BRITISH COLUMBIA | MyEducationBC

Fundamentals

August 2026 v3.9

FUJITSU

Version History

Version	Date	Description
1.0	Apr 2015	Initial version
1.1	Sep 2015	Added description of basic system filters on Student top tab.
1.2	Nov 2015	Removed reference to records per page. Replace Ctrl + F instructions with the search tool. Various screen shot updates.
2.0	Apr 2018	Complete review, rewrite, and change in format
2.1	Jul 2018	Added the section on Save functionality
2.2	Jan 2019	Updated Online Help (Release 5.9)
2.3	Apr 2019	Added hyperlinks to Table of Contents
2.4	Apr 2019	Updated section 6.2 Reports with publish functionality
2.5	Jul 2019	Emphasized the Default Locale preference for language and date
2.6	Jul 2019	Release 5.10 update section 2 user preferences
2.7	Apr 2020	Add Online Forms to Task widget information
3.0	Jul 2020	Release 6.1 updates
3.1	Oct 2020	Email Functionality
3.2	Feb 2022	Updated Section 6.2, and 11.3
3.3	Sep 2022	Updated Section 6.2 email message & Heat ticket information Updated Section 1.1 BC Services Card Log In Screen
3.4	Nov 2022	Added Section 12 for enhanced characters
3.5	Jul 2023	Updates enhanced character list & Upgrade 6.6 information
3.6	Aug 2024	Section 5.0 - Added Information on Quick Status Alert Updated Section 2.2.3.2 – Task Widget enabled by default Updated screenshots for 6.9 Release
3.7	Dec 2025	Upgrade to 2025.2 – Email Templates (section 11)
3.8	Jan 2026	Using Single sign on
3.9	August 2026	Interactive Analytics

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1.0 Fundamentals

1.1 Logging In

Users can login using either one of the following two methods:

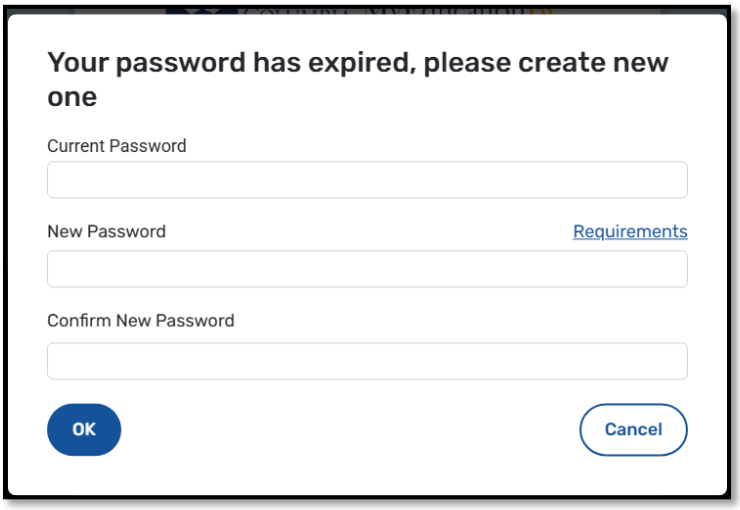
1. **Using Aspen Credentials**:
   Individuals will receive their login name (username) and temporary password from their school or district support staff.
   Go to https://www.myeducation.gov.bc.ca/aspen/logon.do

Enter the username and temporary password in the Login screen, and click **Log On**:

On initial log in, users will be required to change the temporary password before they can proceed. Passwords must meet the following criteria:

- Minimum length is 8
- At least one number
- At least one capital and lowercase letter
- At least one symbol that isn't a letter or number
- Cannot contain 'password', login name, first name, middle name, last name, date of birth, personal id, or only sequential letters or numbers.

Enter the following information in the Change Password pop-up that displays next:

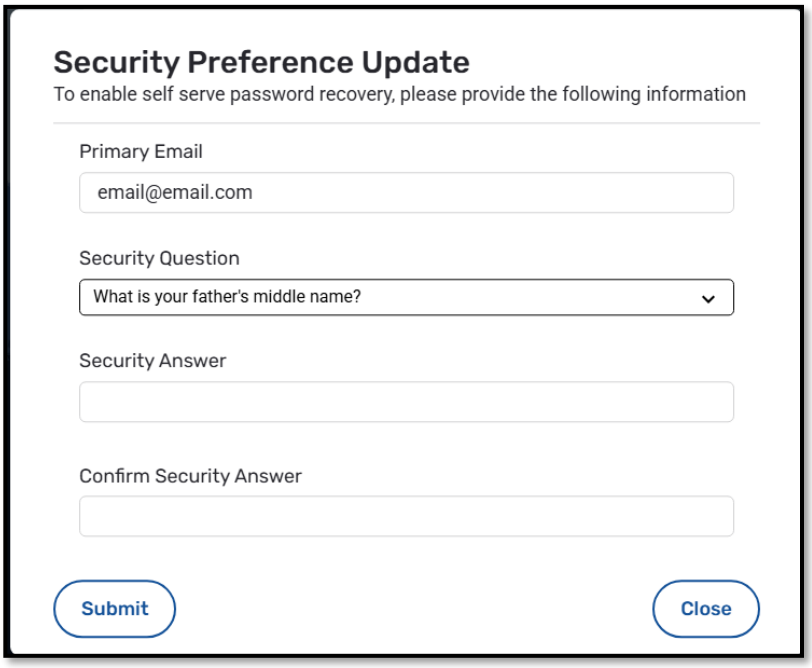


- **Current Password** – enter the assigned temporary password
- **New Password** – enter the new user created password
- **Confirm New Password** – enter the new user created password a second time

Click **OK**.

The Security Preferences Update pop-up window opens next. Setting security preferences will make it possible for a user to use the *Reset your password* option that displays on the trouble logging In? screen. Enter the following information:

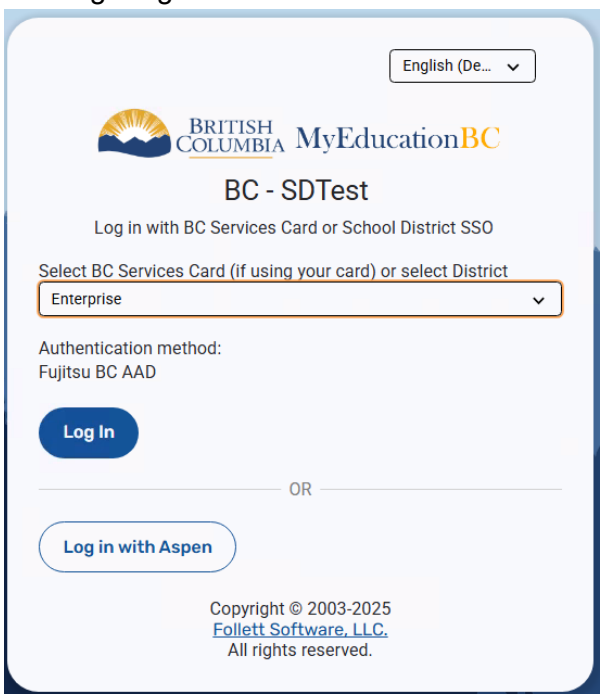
- **Primary email** - confirm or enter the user email that will be used for password recovery
- **Security question** – select a question from the dropdown list
- **Security answer** – enter the answer to the selected question
- **Confirm answer** – enter the answer to the selected security question a second time



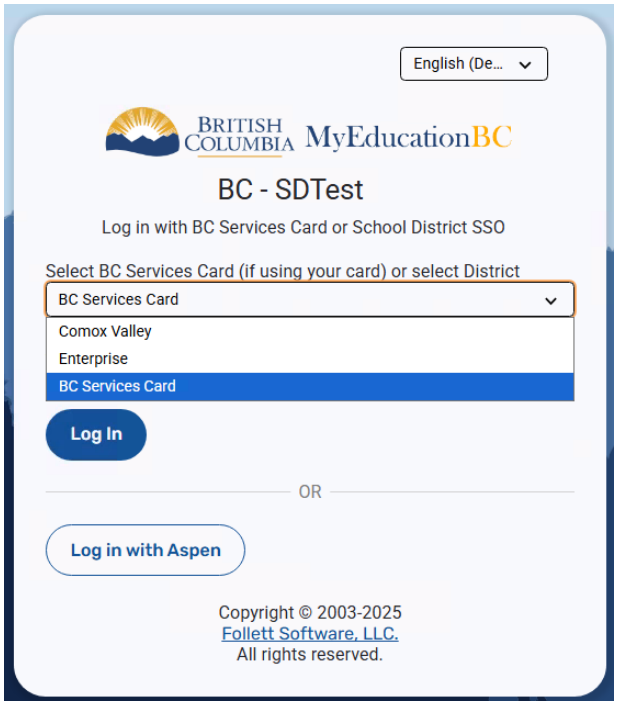
- Click **Submit**

1.2 Using Single Sign On:

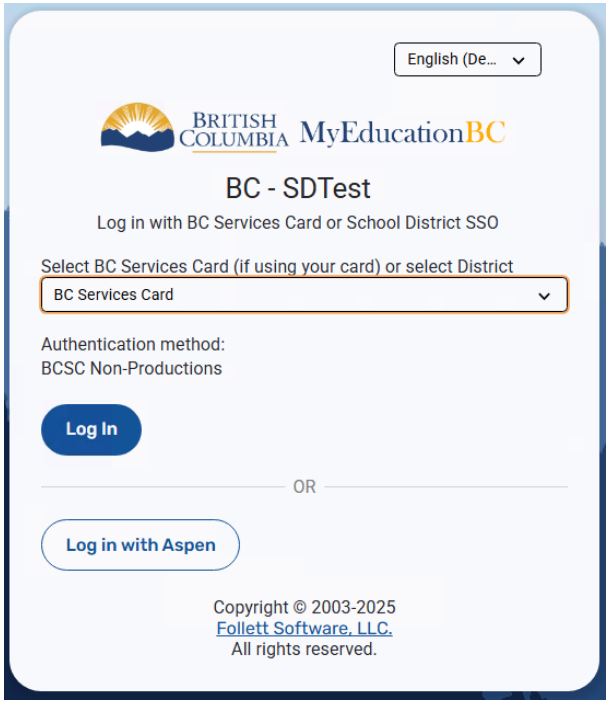
a. Clicking “Log in with BC Services Card or School District SSO” will bring up the below view.



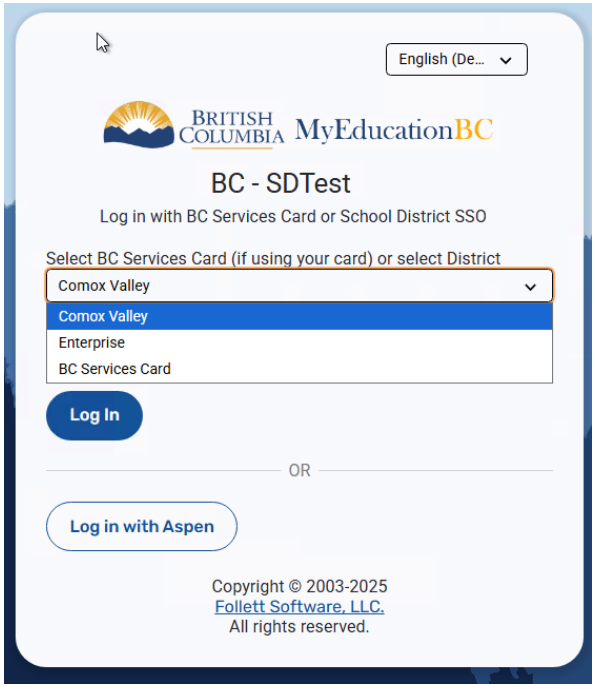
b. To log in with a BC Services Card, users can select “BC Services Card” from the drop-down menu.



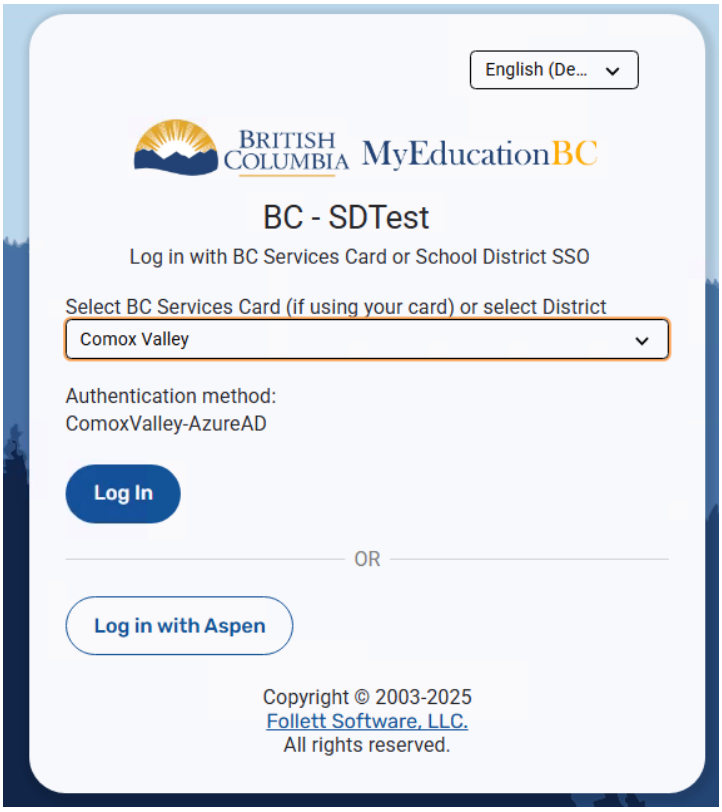
c. Users can then click “Log In”. Doing so will redirect them to the BC Services Card Login Page.



d. To log in with a District Active Directory Single Sign-On (SSO), the district first needs to opt-in to the process by submitting a Heat ticket and complete the configuration. Documentation will be available to outline the set-up process. Once this is done, users can select their district name from the drop-down menu.

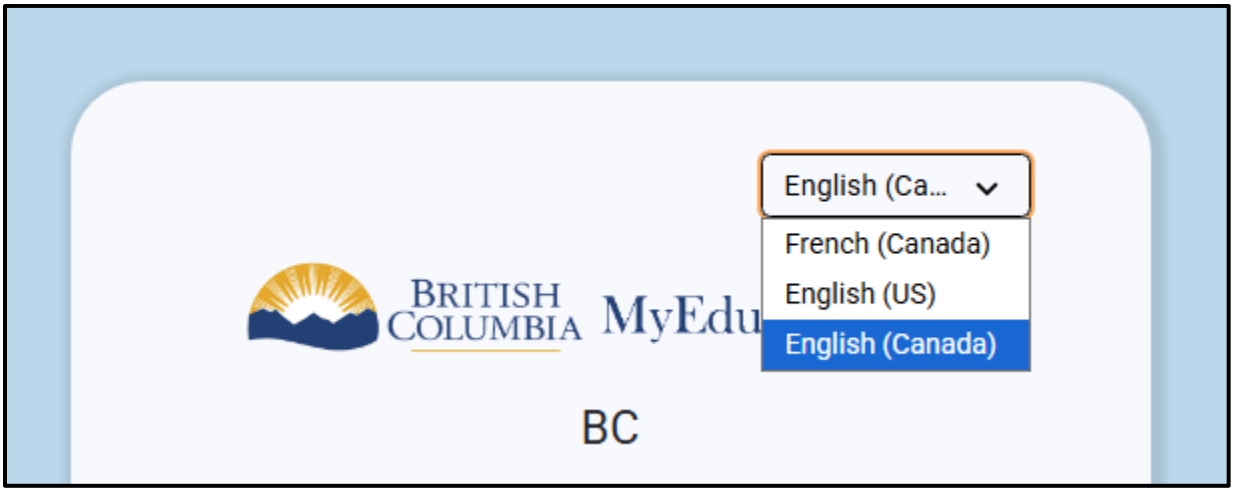


e. Users can then click “Log In”. Doing so will redirect them to the District SSO and if already signed in it will redirect to the Aspen Application without any additional authentication.



1.2.1 Language functionality

Users can now set their preferred language on the Login pop-up. The change is applied immediately across MyEducation BC.



1.3 Multi-factor Authentication

Districts now have the option of using multi-factor authentication to add a layer of security to MyEduction BC. Please refer to the security management guide for setting up multi- factor authentication. If your mobile device doesn't already have an authenticator app, there are many available to download, including Google Authenticator, Microsoft Authenticator, and Authy.

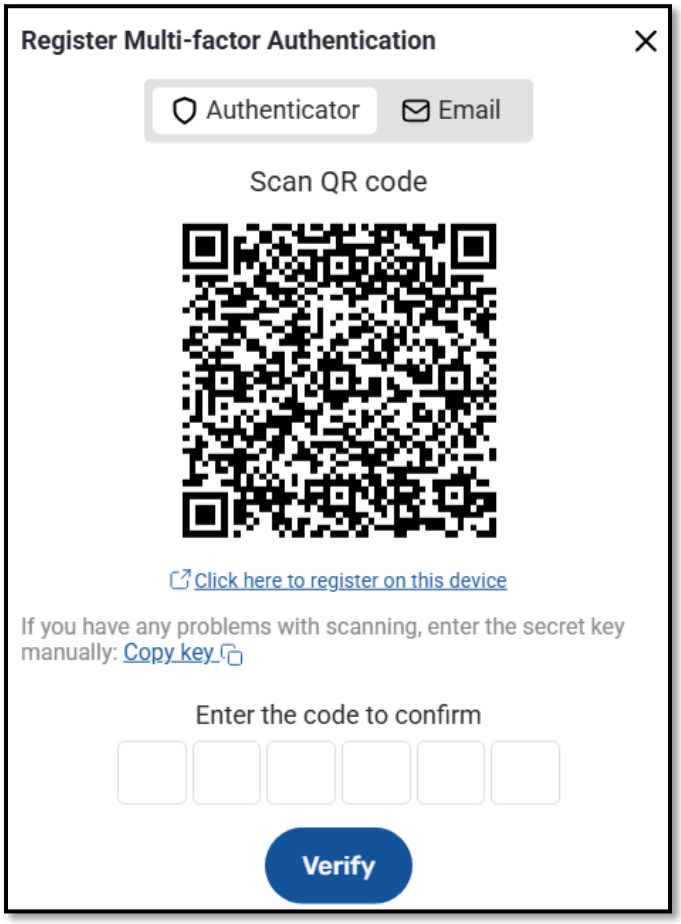
The first time users log in, they have a choice:

- Verify using an authenticator app on their mobile device, or
- Receive a code via email.

1.3.1 To Register multi-factor authentication method:

1. On the login page, enter the username and password.

The Register Multi-factor Authentication pop-up appears when user first login.



2. Select how you want to use multi-factor authentication. The selection will be the default sign-in method:
   - Scan a QR code –

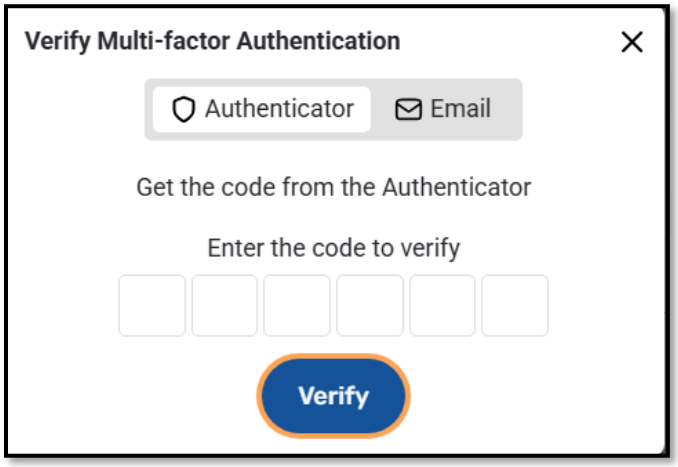
    - Open an authenticator app on your mobile device and use it to scan the QR code that appears in the Register Multi-factor Authentication pop-up on your desktop or laptop.
    - A new entry appears in your authentication app, labeled Follett Software, LLC (*your username*)
    - Enter the six-digit code to confirm
- Receive a code via email
    - In the Register Multi-factor Authentication pop-up, click or tap the **Email** sub-tab.
    - Find a new email from MyEducation BC Support with the subject **Verification code**.
    - Copy the confirmation code, and paste it into the pop-up in MyEducation BC.
- Register your mobile device –
    - Using your mobile device, tap **Click here to register on this device** to open your default authenticator app. The authenticator should automatically add an entry.
    - Enter the six-digit code into the Register Multi-factor Authentication pop-up.
- Copy a key –
    - Using your mobile device, click **Copy key.**
    - Start a new email message,and paste the key you copied into it.
    - Open your default authenticator app, click **+**, and use the manual entry method in your authentication app to paste the key again. A six-digit code appears.
    - In the Register Multi-factor Authentication pop-up, paste or enter the six-digit code.

3. Click Verify. The Security Preference Update pop-up appears.

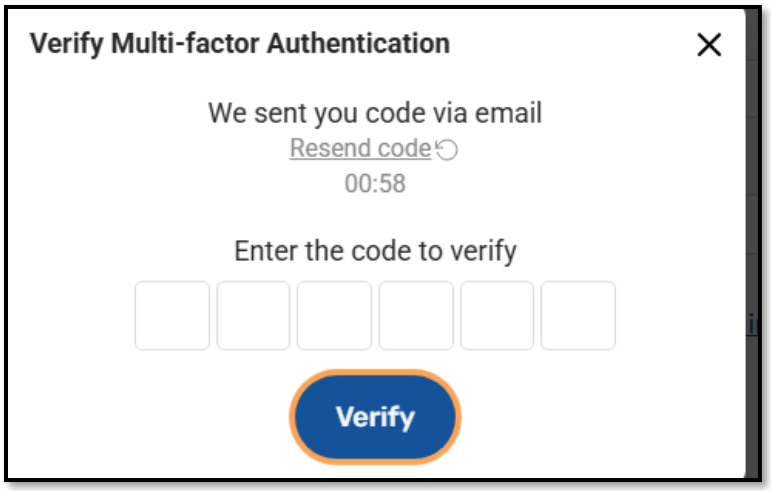
1.3.2 To log in using multi-factor authentication:

1. On the login page, enter your username and password.
2. On the Verify Multi-factor Authentication pop-up, in the **Enter the code to verify** boxes, type the six digit confirmation code from your authenticator app or the email received from MyEduction BC.

Verify multi-factor authentication using Authenticator

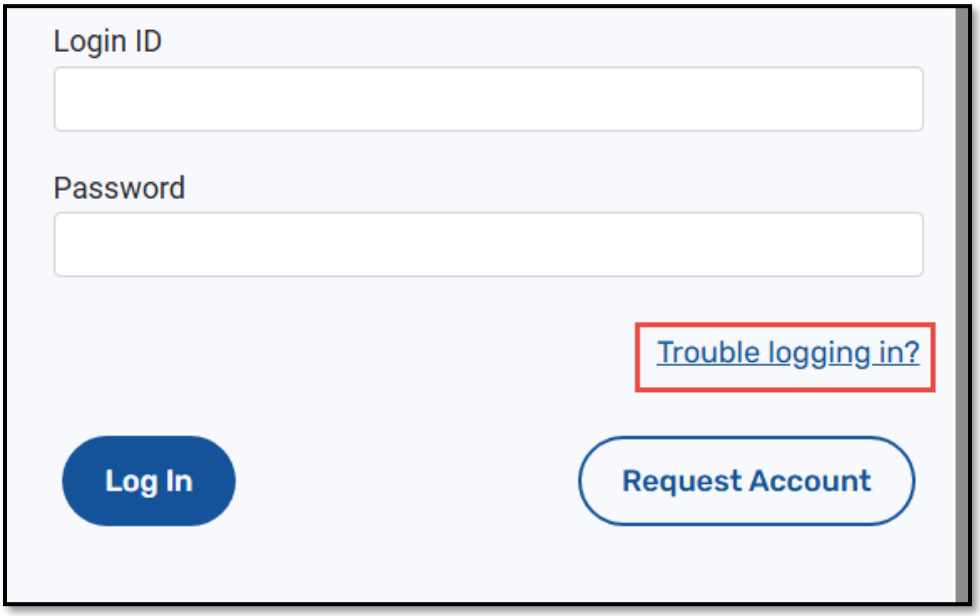


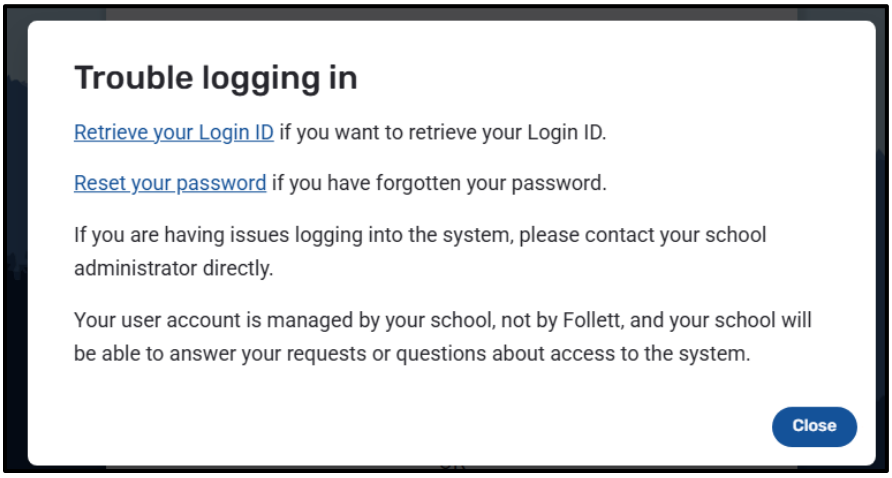
Verify multi-factor authentication using code received via email



1.4 Trouble logging in

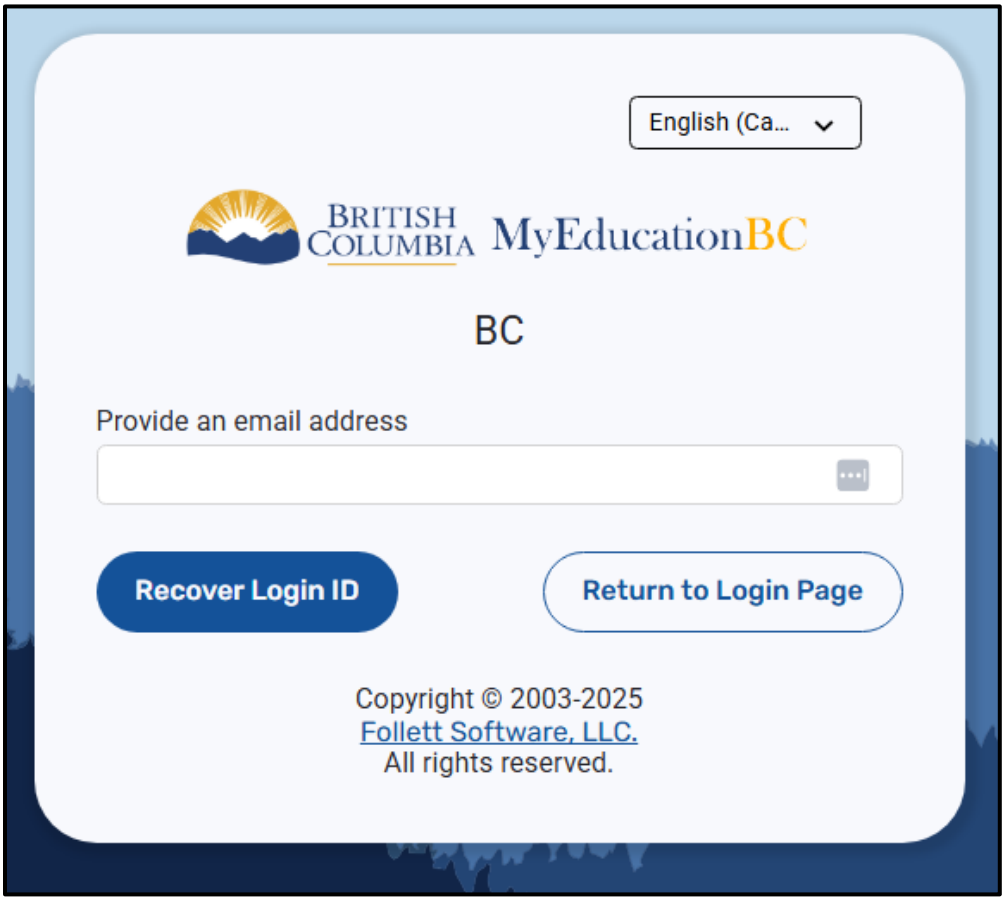
Users can now retrieve their Login ID and reset or retrieve their existing passwords, from the login pop-up by selecting the link 'Trouble logging in?'.





1.5 Retrieve your Login ID

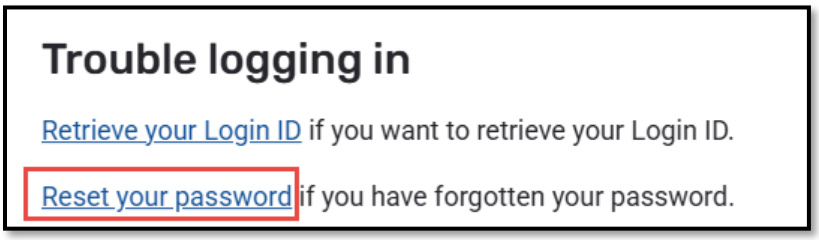
Users can recover their login ID, by selecting the link ‘Retrieve your Login ID’ on the pop up



Enter the email address associated with your MyEducation BC account on the screen and select the ‘Recover Login ID’ button. Open the message with the subject "Login Retrieve Request" to find your Login ID

1.6 Reset your Password

To reset your password, select ‘Reset your password on the pop up



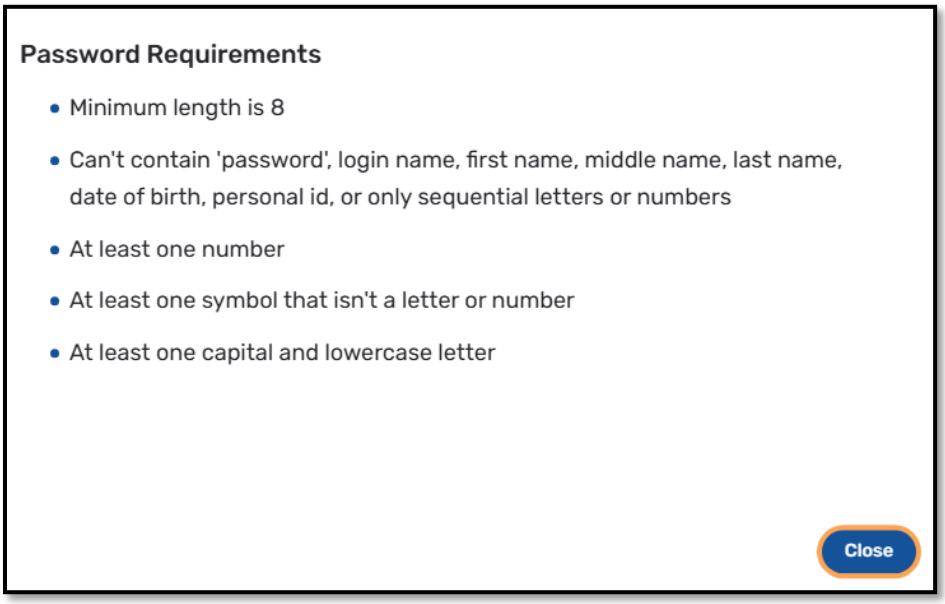
To reset a password, enter your Login ID and click the 'Recover Password' button. You will receive an email with the subject 'Password Reset Request.'

Users can change the password by clicking ‘Reset password’ link to open the pop up and change your password

- **New Password** – enter the new user created password
- **Confirm New Password** – enter the new user created password a second time

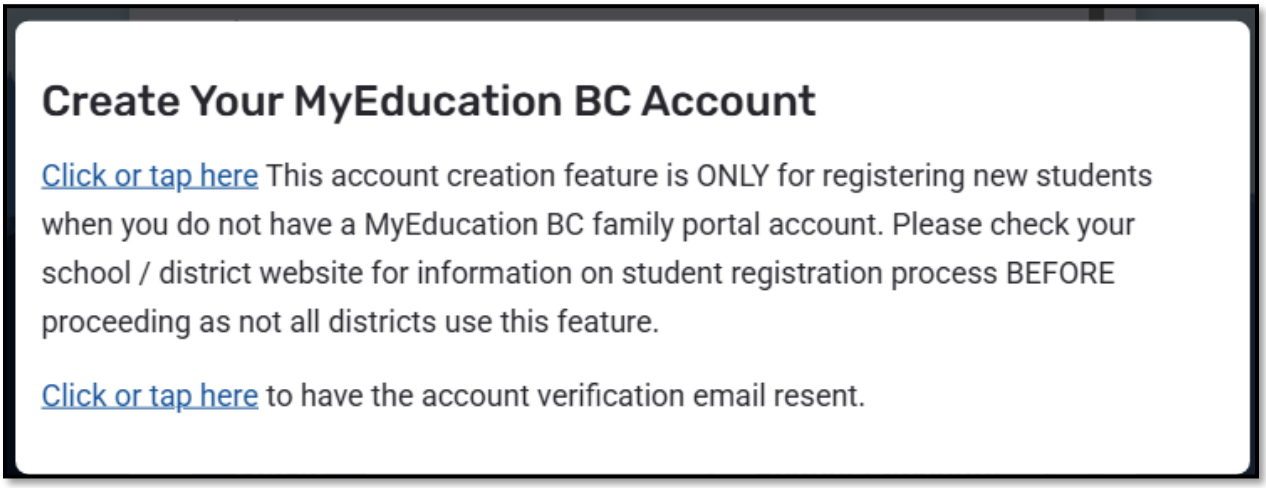
Click **Reset Password**

To view password requirements, click the 'Requirements' link.



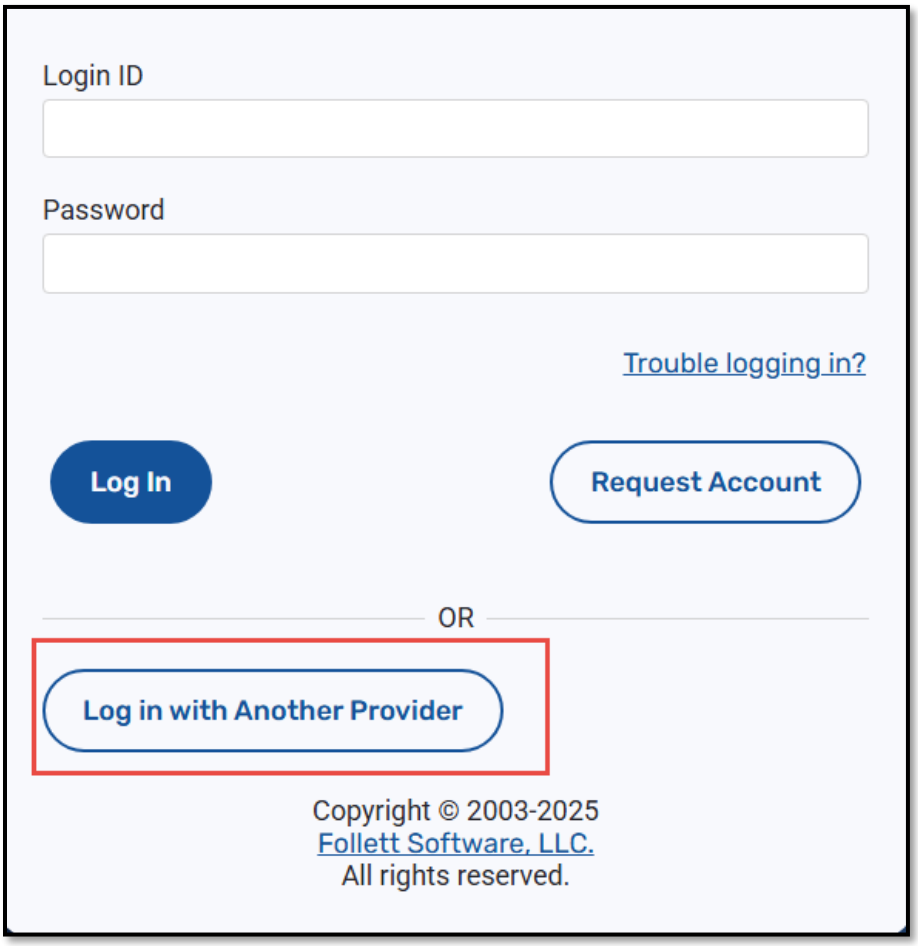
1.7 Request Account

Request account creation feature is ONLY for registering new students when you do not have a MyEducation BC family portal account.



1.8 Login with another provider

The '*Log in with* Another Provider' is for the BC Services Card and is only for students and/or parents. For more information please contact your school district.



2.0 Managing User Preferences

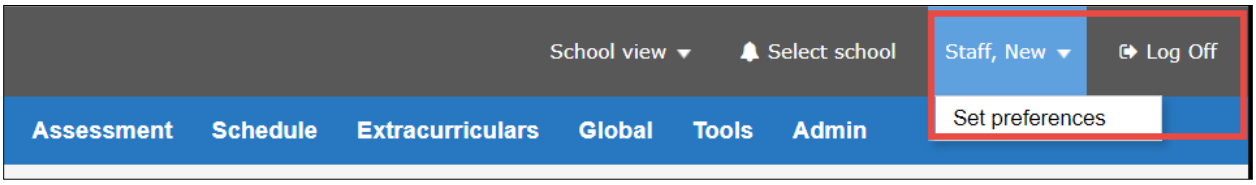
2.1 Security

The level of access each individual has in MyEducation BC, i.e., what data elements and menu items they can see, etc., is determined by the security role(s) assigned to their user account by their district or school.

2.2 Settings Bar

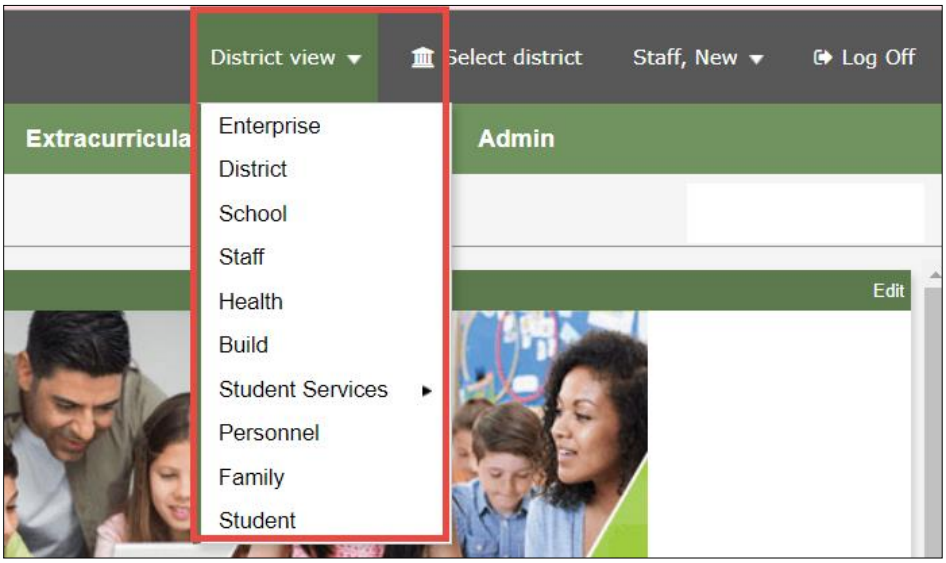
The settings bar is the first level of navigation in MyEducation BC. The options visible to the user are determined by the security access granted by the district. *Select School*, for example, will only appear if the user has access to more than one school.

All users see ***Set Preferences***, in the drop-down menu under their name, and ***Log Off.***



2.2.1 View Navigation

The View that individuals see when they login, e.g., District, School, Staff, etc., is the default view for the security role assigned to their user account. If a user has several roles assigned, the preferred View can be set as default under user preferences. Users with access to multiple views, as illustrated below, have a dropdown selection for view navigation. Selecting a different view from the dropdown changes the way the information is displayed and scopes the information to the selected view. The example below shows the options typically available to a District level user.



To change views:

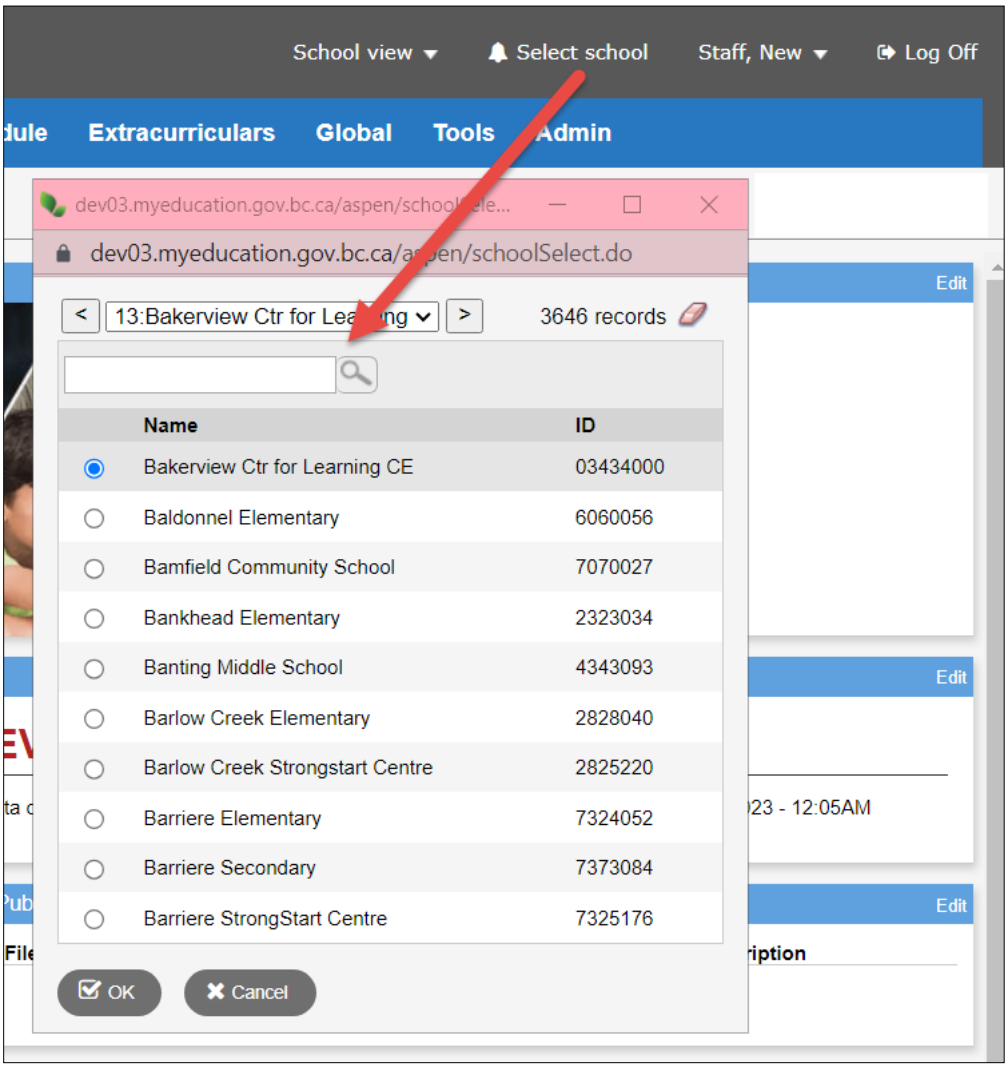
1. Click the drop-down menu under the current **View** on the settings bar
2. Select a view.

2.2.2 Select School

If the user account has access to more than one school, the Select School option will appear on the settings bar menu.

To select a school:

1. Click **Select School** on the settings bar.
2. In the pop-up window that displays, click the radio button beside the appropriate school.
3. Click **OK**.

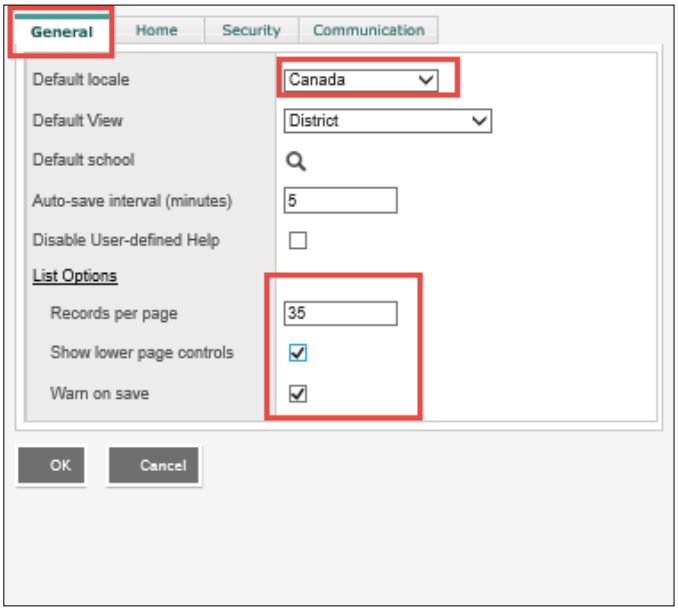


2.2.3 Set Preferences

This option on the settings bar allows users to personalize MyEducation BC. The preferences that display in the pop up are specific based on the roles assigned to the user account and depend on the view the user is in, e.g., District view is different from School view.

2.2.3.1 General

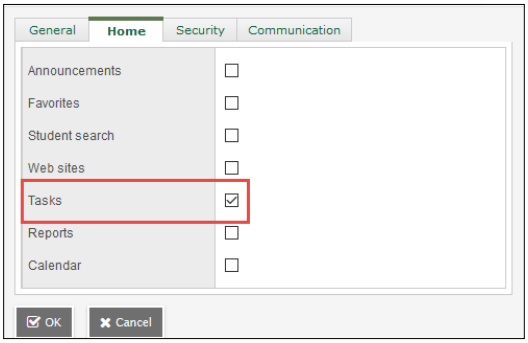
The settings under the General tab determine the default presentation of screens for the user – i.e., the default view and school as well other options of a general nature. A user with a Teacher Security Role you will be also see Gradebook Top Tab. See the table following the screenshot for a definition of each of these fields.

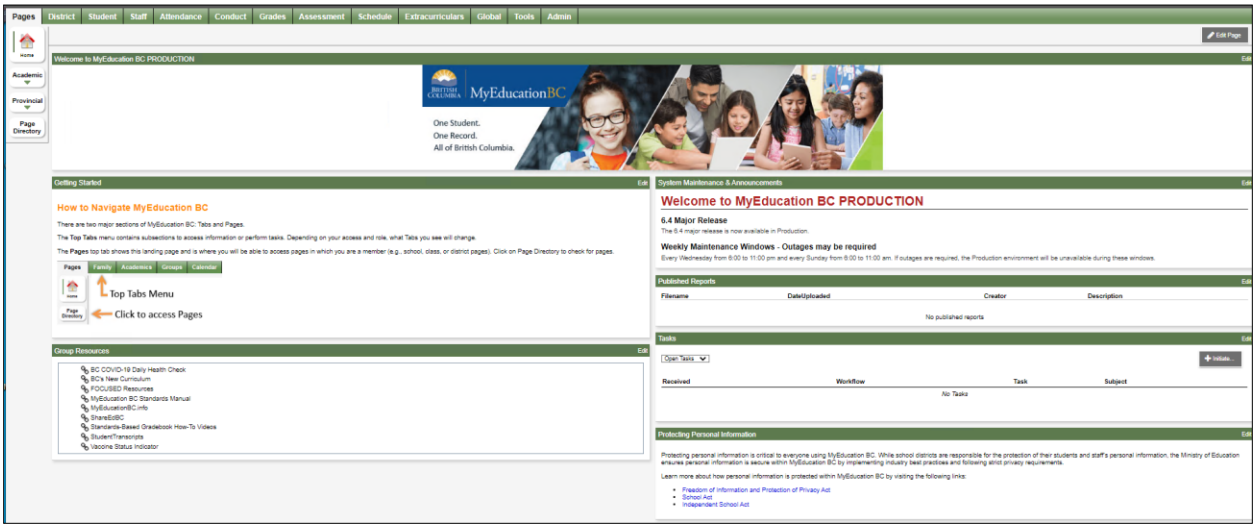


Field	Description
Default Locale	Default Locale determines the **Language** and **Date** format for each individual user. **French (Canada)** displays French text and report options, while **Canada** will display English text and report options. This selection also affects the display of dates in MyEducation BC: **Canada**: Dates appear as *date/month/year* **French (Canada)**: Dates appear as *year/month/date* **US**: Dates appear as *month/date/year* **Note:** ***A Default Locale must be set to prevent exception errors when saving preferences, including the Gradebook Preference Settings.***
Default View	Click this drop-down to select the default view when logging on to MyEducation BC if the user has more than one view.
Default School	Click the to select the default school when accessing the School view if the user has more than one school.
Auto-save interval (minutes)	Type the number of minutes to lapse before the system automatically saves the information entered on a detail page. The system displays a message to the right of the **Save** and **Cancel** buttons on detail pages, alerting the user of the time of the last auto-save, or why the auto-save failed.
Disable User-defined Help	This disables the user-defined help icon for fields. This icon gives brief "tip" information on what is expected in that field.
Records per page	This determines how many records display on the screen in a list before moving to the next page to see more. Set at the Enterprise level, the maximum records per page is 35.
Show lower page controls	Page controls display at the top of a page where the number of records in the list exceeds one page. To display the page controls at the bottom of all list pages, select this checkbox.
Warn on save	Check this box to display a warning when the user clicks Save on a list page after using the Modify List option. This is specific to the Modify List function and does not affect the user prompts to save when changing screens or tabs in the application.

2.2.3.2 Home

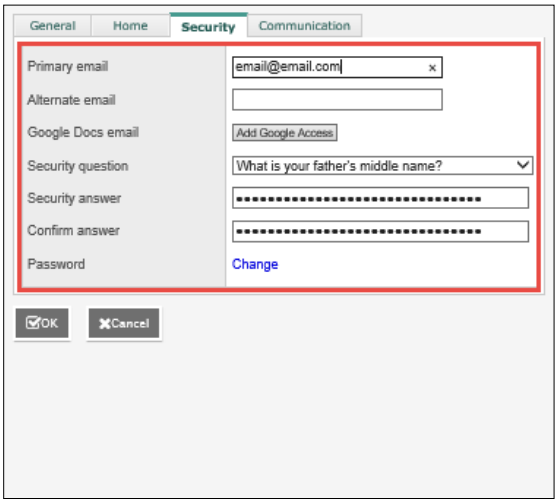
The **Home** top tab in Set Preferences has one setting used in BC. The **Tasks** checkbox allows the user access to the Tasks widget on the user home page. The Tasks widget is used with the Student Self Assessment and Online Forms functionality. Check the Tasks box to display the Tasks widget. Tasks widget is enabled by default.





2.2.3.3 Security

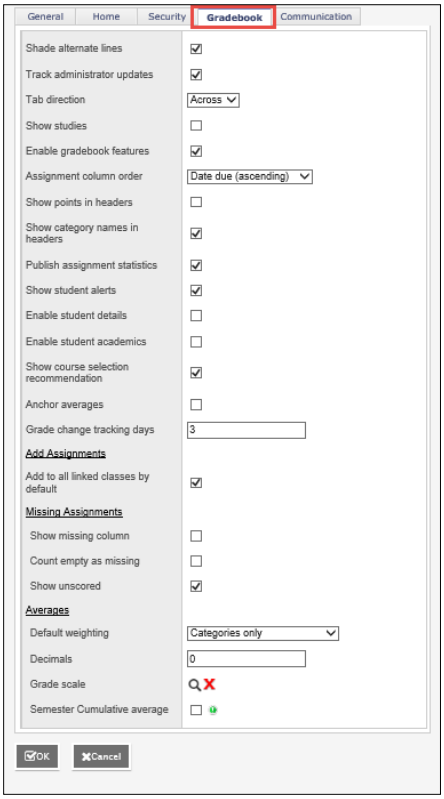
The Security sub-top tab in Set Preferences records the user's email address, and the security question and answer, that are required to enable the *I forgot my password* functionality on the login screen. User Passwords can be changed here by clicking the blue hyperlink *Change* then entering the current password and new password in the pop-up screen.



Field	Description
Primary email	Type the primary email address. The system sends the password to this address when the 'I forgot my password' link on the logon page is used. Note: This is the address that displays in the From field when using the Send Email option.
Alternate email	If an alternate email address is entered, that address displays. This has no functionality in MyEducation BC.
Google Docs email	This has no functionality in MyEducation BC.
Security question	Click this drop-down to select the security question to be used for the "I forgot my password" function.
Security answer	Type the answer for the security question. This will be case-sensitive.
Confirm answer	Type the security answer again.
Password	Click Change to change a user password. Password requirements can be viewed by clicking Click to view.

2.2.4 Gradebook

Grade book only appears if you are in the Staff View. Teachers can also set their preferences on the Scores page and the Class List page by clicking on the gear icon



2.2.5 Communication

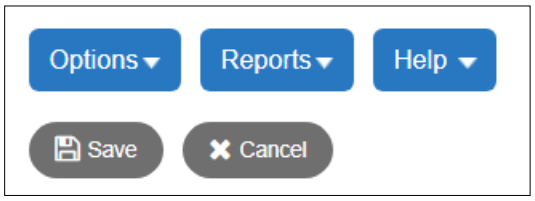
The communication tab holds Forum Options, where you can set the number of Forum posts per page. Setting used in the student portal.

2.2.6 Log Off

Use the **Log Off** button in the top right hand corner of the *Settings Bar* to exit MyEducation BC. This will properly terminate the session.

3.0 Save Functionality

As with any software, users should ensure that they are saving often to avoid loss of work. Save buttons are available at the top and bottom of screens throughout the application.



3.1 Auto-Save

In addition to the save buttons, many screens in MyEdBC have an Auto-Save feature. While this is handy functionality, users should not rely on it as a means of saving their work. Regular use of the save buttons should ALWAYS be the primary method for saving. See the separate *Fundamentals Appendix: Auto-Save Statistics* for a list of screens that provide the Auto-Save functionality as a back-up measure.

Note: The auto-save interval (number of minutes before a screen is auto-saved) is determined by the user preference settings as outlined in the *Preferences - General* section above.

3.2 Gradebook and Grade Input Scores Save Functionality

Staff > Gradebook > Scores

School > Grades > Grade Input > Input Grid

The grade entry screens in School and Staff view have a save-as-you-go functionality. When a score is entered and the user moves out of the cell, the message: *Saving, Please Wait….* displays above the score grid and the cell will turn yellow. The mark column entry is saved when both the message and the yellow cell colour have cleared the screen. To avoid loss of work, do not begin entering information into the next cell until both the message and the yellow colour are no longer displayed on the screen, indicating the save has completed.

3.3 Removing Browser Buttons (F11)

Browser buttons for back and forward and cancel should not be used to navigate the application. Navigating with the browser buttons can generate *application errors* or *browser out of synch* errors.

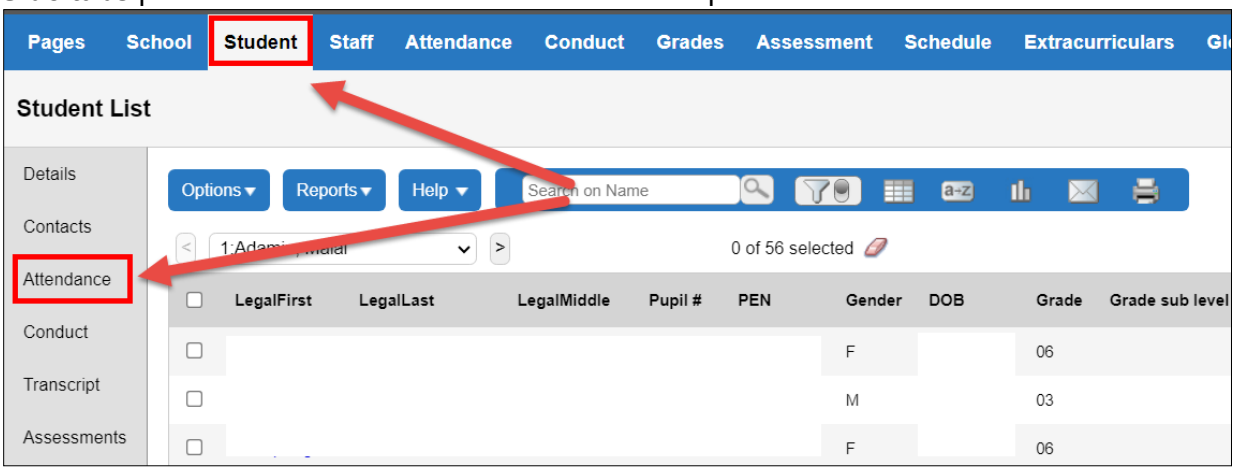
F11 will hide the browser menu, removing the back, forward and cancel browser navigation. This is a toggle function; pressing F11 again will return the browser buttons.

4.0 Navigation Tools & Selecting Records

4.1 Top Tabs and Side Tabs

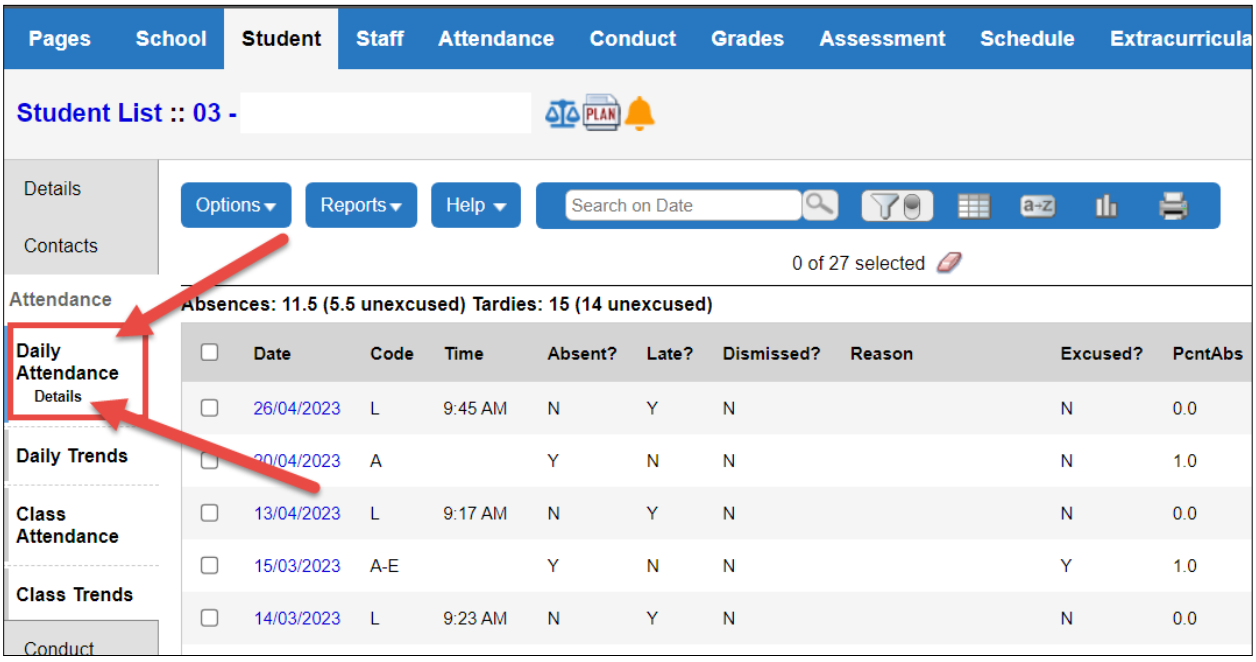
Top tabs represent functional areas of MyEducation BC. These are scoped to the user view and role so a user will only see what they have been given access to view and work with. The top tab that is highlighted indicates where the user is in the application.

Side tabs provide access to additional details of the top tab functional area.

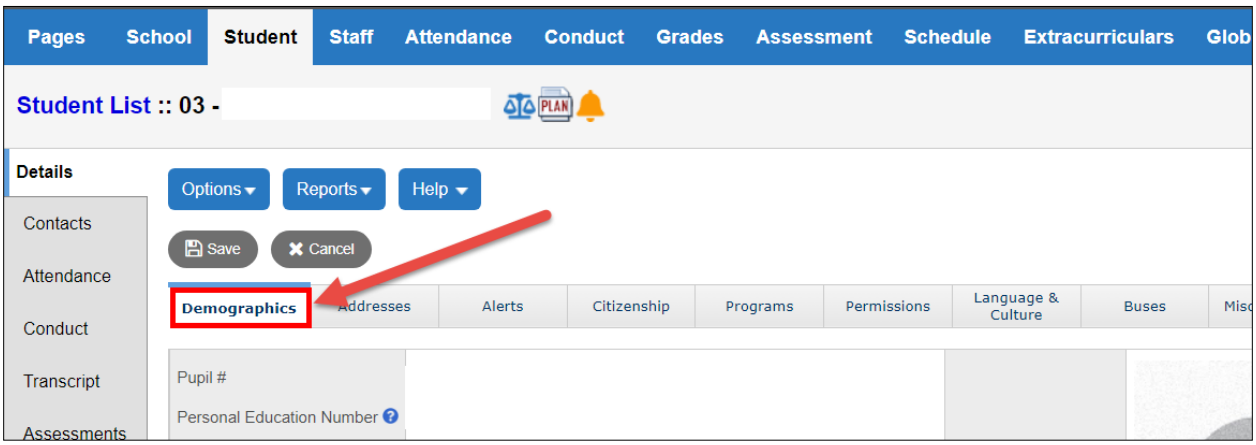


4.2 Sub-side Tabs, Sub-top Tabs and Leaves

Side tabs usually contain **sub-side tabs, leaves** and **sub-top tabs.**



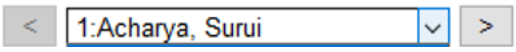
Sub-top tabs display at the top of a list, when a side tab is selected.



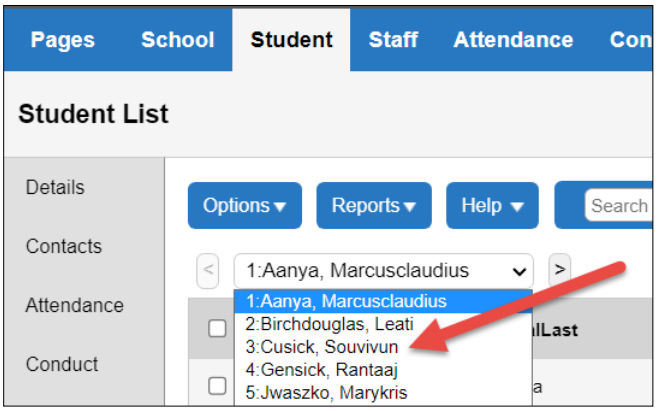
4.3 Page selector

This navigation tool allows the user to select a range of records. The tool displays by default at the top of the list of data, and will display at the bottom of the list as well if the preference to *Show lower page controls* has been set.

Use the drop-down arrow to select a page in the list, or the back and forth arrows at either side to move through the pages consecutively.

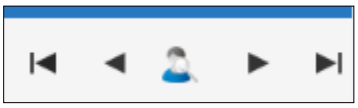


In the drop down menu, the first record on each page is indicated. The number of records that display on each page is determined by the user preference setting *Records per page*.



4.4 Record Navigation Bar

The *Record Navigation Bar* can be used to change the record being viewed.



For example, if the user is in the **Student** top tab > **Details** side tab, only one student is displayed. The user can:

- Use the in the record navigation bar to search for a new student without returning to the student list.
- Use the forward and back arrows on the record navigation bar to move to the next consecutive record.
- Use the first and last record buttons to move to the first record in the page selector or to the last record in the page selector.

4.5 Search Tool

The search tool is present throughout the application to provide the ability to search the values in a field set or pop-up list. The user can enter the search criteria. The search is conducted on the first column of information in the field set, **or** the column of data that represents the primary sort. Clicking on a column header will sort the data on that column, and the search function will work on the selected column. The Search tool indicates which column the search is using with a *Search on …* prompt before text is entered in the field.

Filters determine the students included in the search. For example, if the filter is set to Primary Active Students in the student list, the search will not return results for a student who is a secondary student. For details on Filters see the Filters section.

Results are returned with the closest match the system can make. The closest match record will be selected in the list.

1. Enter the value to search for in the search field.
2. Click the magnifying glass or the enter key to execute the search.

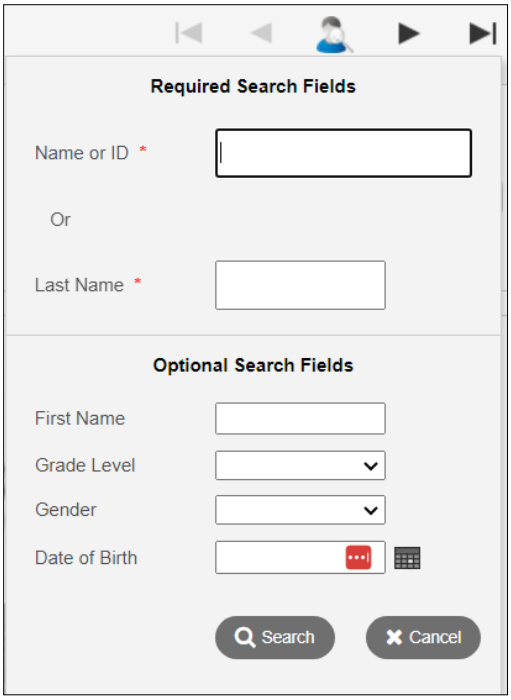
4.6 Finding and Selecting a Student by Name

There are four ways to find that student on the Student List:

- Type the name in the Search box , and then click .
- Use the Find pop-up (CTRL+F).
- Use the Page drop-down .
- Press CTRL+I to search for a student by initials.

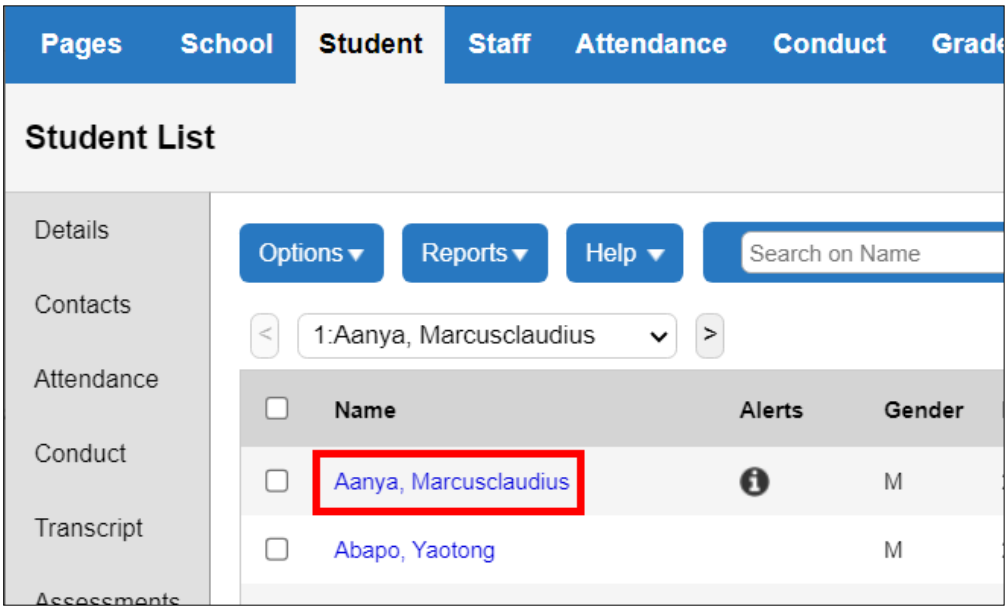
If you are on a student details page (Student > Details) and want to look for a different student, click on the record navigation bar and search through the student pick list.

Depending on your district's Student preferences, the Student Search icon appears in the record navigation bar (in place of). To search for a different student, click . A pop-up appears:



4.7 Hyperlinks

Hyperlinks are in blue lettering and an underscore displays when the user hovers over them with a mouse. Clicking on a hyperlink will take the user to the details of that particular record.



4.8 Breadcrumbs

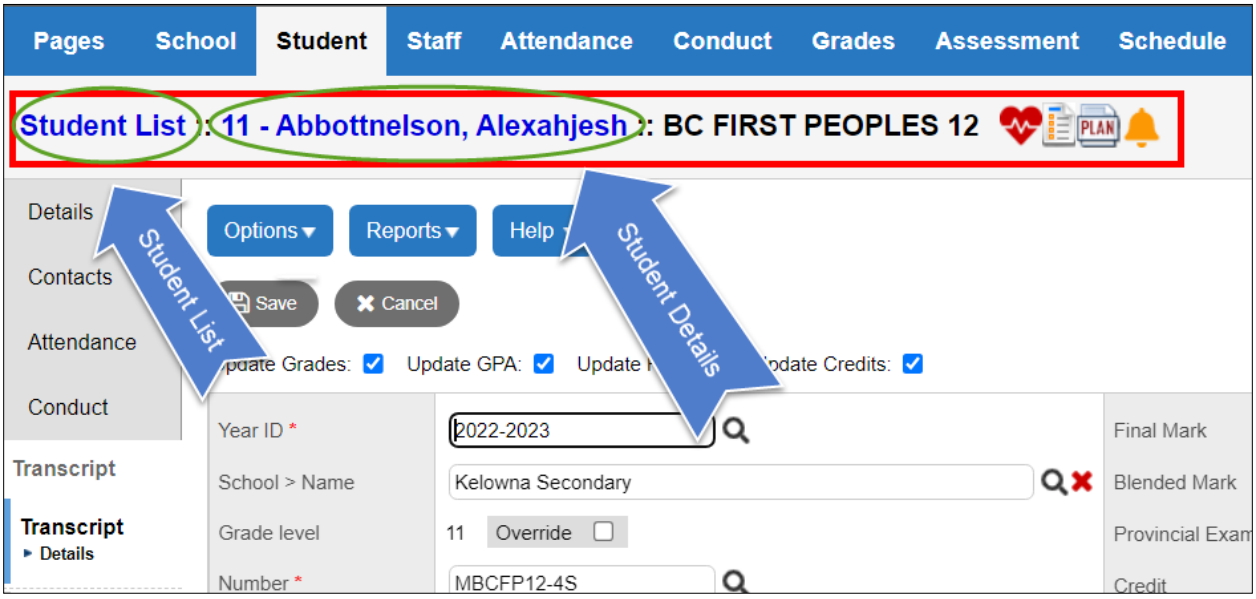
When a user has selected a record and is viewing the details, a *breadcrumb* trail will appear at the top of the list to indicate the path used to arrive at that location. The breadcrumb presents with blue hyperlinks, clicking on any of the hyperlinks within the breadcrumb will return the user to that location.

In the example below, the user is viewing student transcript record for a sample student in the **School** view.

The user arrived at this screen by following this path: **Student > Transcript > Details.** The steps to follow the path are:

- Click the **Student** top tab
- Select the checkbox next to the student name in the **Student List**
- Click the **Transcript** side tab
- Click the **Details** leaf (or click into the blue hyperlink on the transcript record)

The user can return to the *Student Details* by clicking on the **Student Name** in the breadcrumb trail, or return to the *Student List* by clicking on **Student List** in the breadcrumb trail.


Pages
School
Student
Staff
Attendance
Conduct
Grades
Assessment
Schedule
Student List : 11 - Abbottnelson, Alexahjesh : BC FIRST PEOPLES 12
Details
Contacts
Attendance
Conduct
Transcript
Transcript
Details
Student List
Student Details
Options
Reports
Help
Save
Cancel
Update Grades:
Update GPA:
Update Credits:
Year ID *
2022-2023
School > Name
Kelowna Secondary
Grade level
11
Override
Number *
MBCFP12-4S
Final Mark
Blended Mark
Provincial Exam
Credit

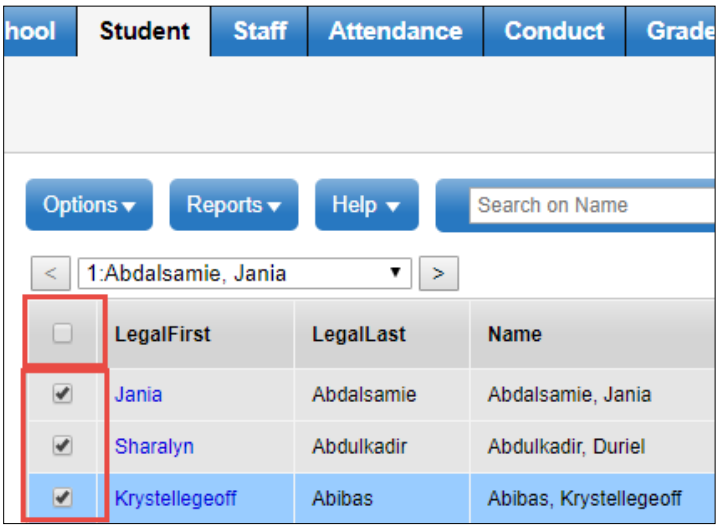
4.9 Checkboxes vs Radio Buttons

There are many selection lists throughout MyEducation BC. If a list shows round radio buttons, it indicates that only one record can be selected. If a list shows square checkboxes, then multiple records can be selected.

4.9.1 Checkboxes

A sample of the Checkboxes are found on the Student list:

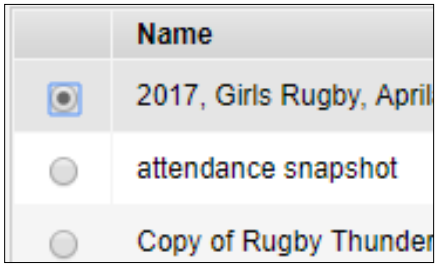
- More than one student can be selected at a time using the checkboxes in front of their names. Checking the checkbox at the top of the list will select all of the records visible on the page.



4.9.2 Radio Buttons

A sample of Radio Buttons is found in Student > Options menu > Snapshots:

- Only one snapshot can be selected because there are radio buttons in front of them.



4.10 Clearing Record Selections

When multiple records have been selected in a list, a user may clear them using one of the following options:

- Manually uncheck the box in front of a record. This will de-select an individual record.
- Use the icon at the top of the list of selected records. This will clear ALL selections.
- Changing the filter to generate a new list.
- Leaving the top tab to navigate to another area of the application. This is only true if the user is on the main list and has not performed an Options > Show Selected on the records.
- Logging out of MyEducation BC.

5.0 Icons and Alerts

MyEducation BC will display a number of icons throughout the application to indicate additional information or alert information. Hovering over these icons will provide a tool tip that displays what type of information the icon contains. Clicking on the icon will generate additional information. These icons include:

- **Medical and health alerts**:
- **Legal alerts:**
- **Other alerts:**

- **Quick Status for locating a student:**
- **Student Services alerts:**

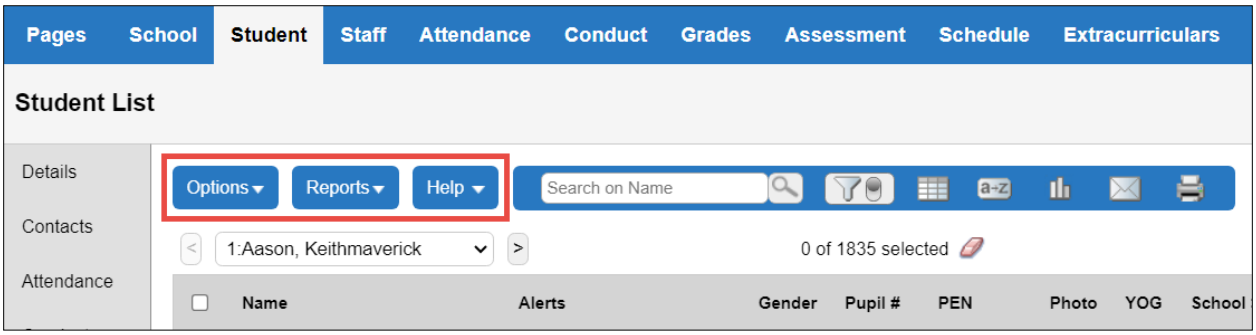
- **Family alerts:**

Information on maintaining student alerts is included in the Enrollment Management and Student Demographics and Student Services documentation.

For secondary students both schools must configure the DayNum value for their calendar dates in session or the Quick Status alert will not work for either school.

6.0 Menu Bar Buttons

The menu bar buttons display just below the top tabs in MyEducation BC. The menu bar buttons are the same regardless of the top tab the user selects, and the list of items in the list display based on the screen.

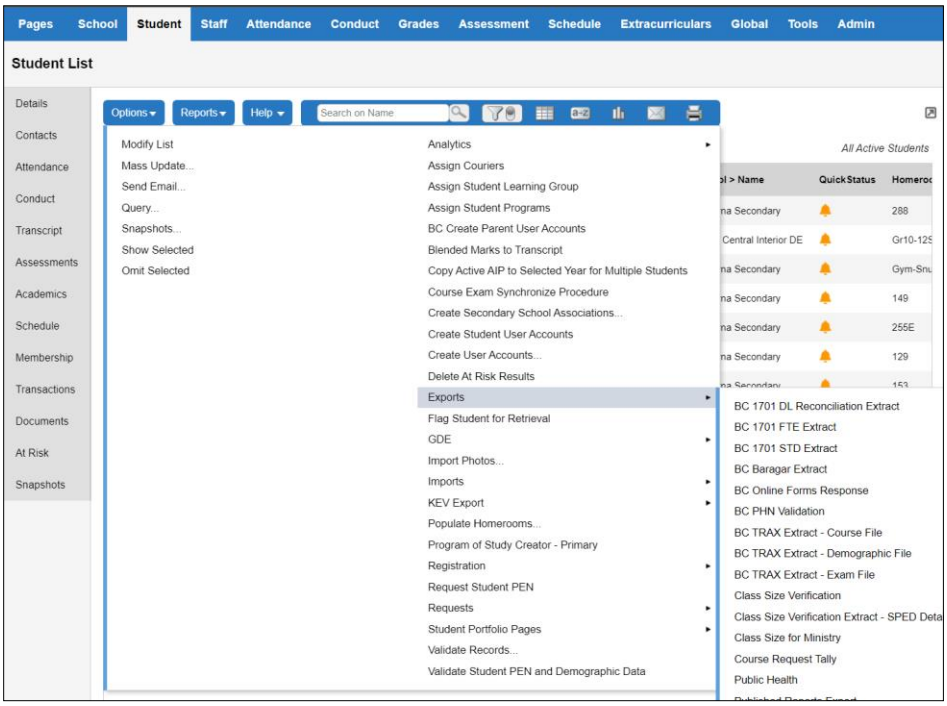


The items displayed in the dropdowns of the menu will change, depending on the top tab *and* side tab the user has selected.

The various tools in the menu bar are described in the following sections.

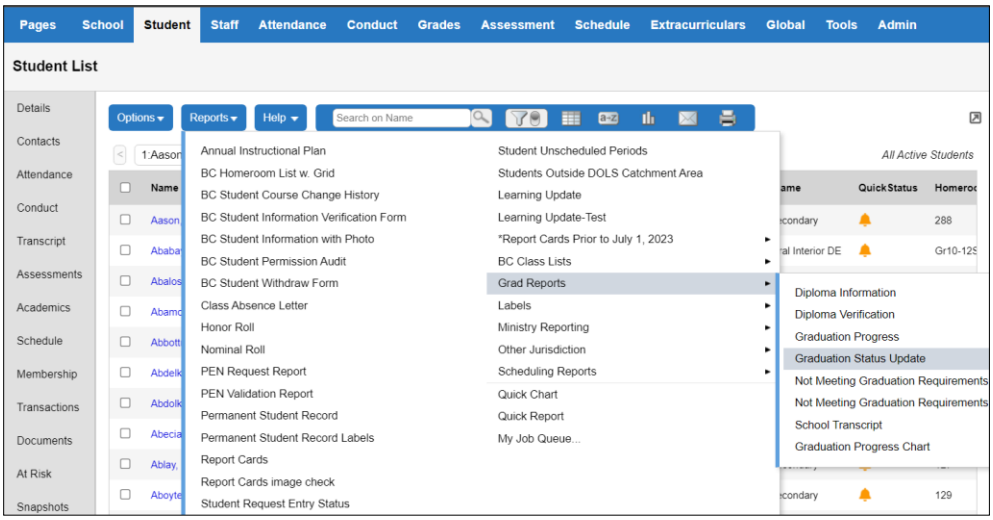
6.1 Options

The **Options** menu is an action centre where a user can initiate actions on the data that is displayed on the screen. The Options list may include items with an arrow, indicating a fly out menu with additional options.

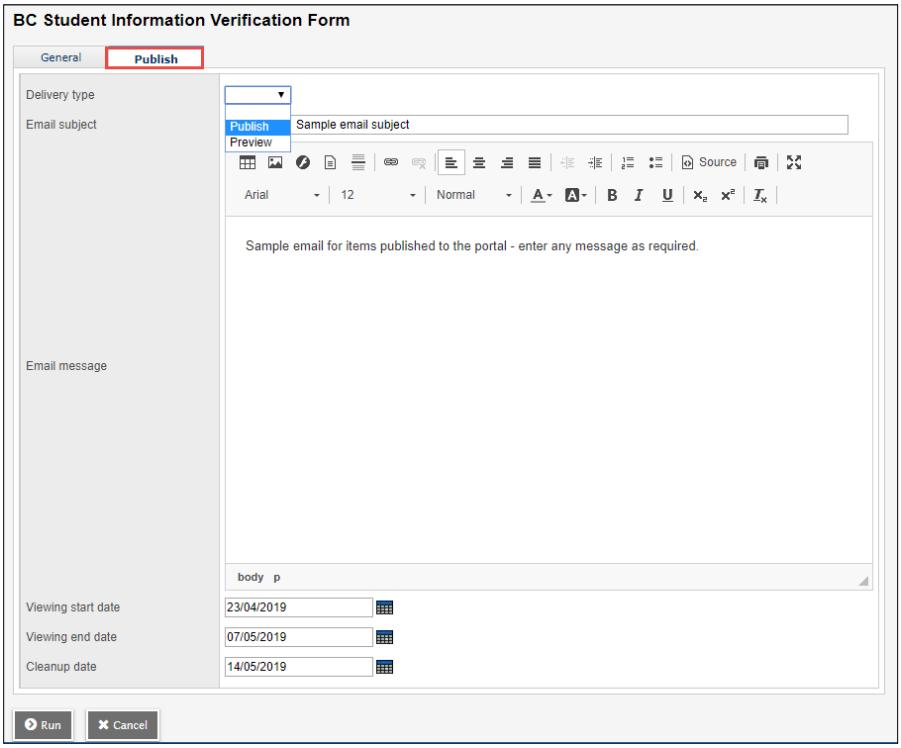


6.2 Reports- Print and Publish

The Reports button displays a list of reports available. This list is based on the top tab, side tab and leaf currently selected. For example: When in *School* > *Student* > *List* the Reports button provides a number of reports related to student demographics which can be printed for multiple students. When in *School* > *Schedule* > *Master* > *Sections* the Reports button provides a list of reports related to scheduling and course sections. The Reports list may include items with an arrow, indicating a fly out menu with additional reports.

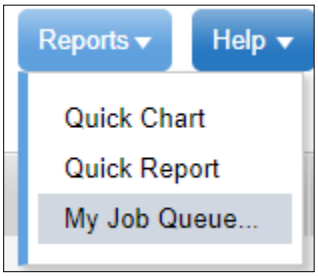


Selecting a report brings up a parameter form with items to select before running the report. Reports with publish functionality will display an additional tab for the outgoing message sent to parents/students when the report is published to the Family or Student Portal. To use the publish functionality the user must have a Security Role to see the Publish Sub Top Tab.



Fields	Descriptions
Publish Preview	Previewing a report does everything except send a notification email and put the report into the Published Reports widget.
Email Subject	Type a subject for your email message. Limit of 100 characters.
Email Message	Enter the desired content for your report.
Viewing Start Date Viewing End Date	This is the date that you want the report to appear in the Published Reports widget. Default value is today. Edit if needed. This is the date that you want the report to disappear from the Published Reports widget. Default value is two weeks from today. Edit if needed. Note: All published reports must have a viewing end date. They cannot display in the widget indefinitely.
Cleanup Date	This is the date that the report and publish log are completely removed from the system. Default value is one week after the viewing end date. Edit if needed.

The My Job Queue item in the Reports list will present a window that shows reports the user has run and the report status. It is not necessary to wait for a report to finish once Run has been selected. The report can be retrieved later from My Job Queue.



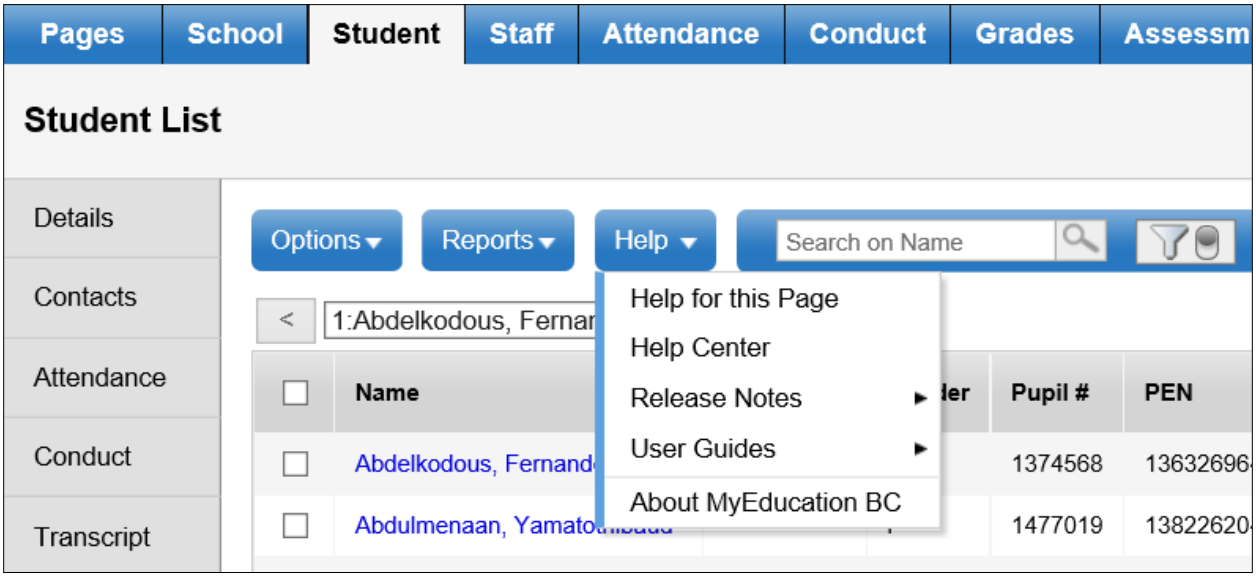
Helpful Tip:

If a school realizes they published the wrong data, a Service Request (using template Change Report Viewing Dates) can be submitted through HEAT by the District L1 and the Service Desk can roll back the dates, which removes the report from the parent portal. This can only be done for the entire report card run and not for an individual student.

6.3 Help

The Help button provides several options for online instructions and tools that are core to the Follett product. The Help list may include items with an arrow, indicating a fly out menu with additional tools.

Note: The tools in the Help menu are not customized for MyEducation BC and may reference options or functions that are not available to District and School Users due to BC specific standards and configuration.



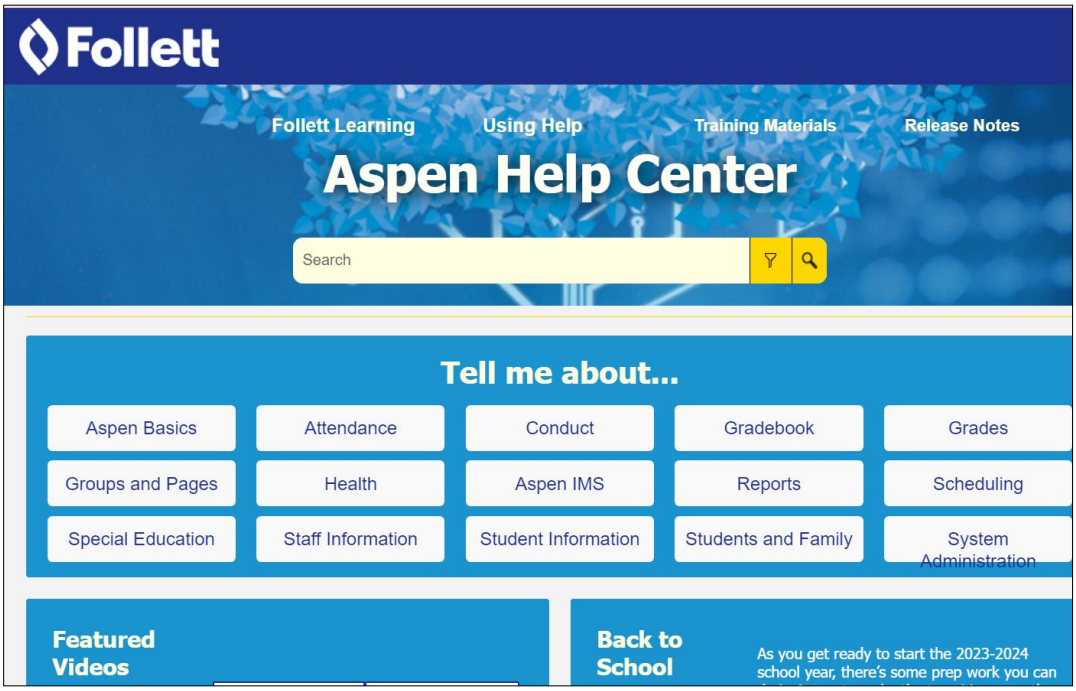
The ***About MyEducation BC*** item provides information about the server to which the user's session is connected. This will display below the copyright information and can be useful information for the service desk if users are experiencing problems with performance or report running in MyEducation BC. Example: vaspnapprd5 indicates that the user is on server 5.

6.3.1 Online Help

Help for this Page and *Help Center* open in a new window and provide a variety of ways to search for information.

The *Help for this Page* functionality identifies where the user is, and directs them to information related to that top and side tab. For example, if the user is in *School* > *Student* > *Membership* and selects the Help for this Page option, they are directed to *Working With Student Enrollment Information* in the online guide. In addition, Help topic(s) are listed to the left of the screen.

The *Help Center* functionality displays a screen with a search bar, results page and topic icons to assist with navigation.



If the user enters a specific search term, a results page will display related results and to the left of the screen Help topics will be listed. If the user selects a topic icon, a drop-down of related topics will display for selection. Once selected, the specific topic page will display and Help topics will list on the left of the screen.

The information in the On-line help is not customized for MyEducation BC and may reference options or functions that are not available to District and School Users due to BC standards and configuration

6.3.2 Release Notes

Release notes will provide information about the latest changes to the software product. This information refers to the Follett application as a whole; it is not customized for MyEducation BC. The release notes will reference options or functions that are not available to District and School Users based on BC standards and configuration.

6.3.3 User Guides

User guides open up as documents with hyperlinks in the table of contents. These guides are not customized for MyEducation BC.

7.0 Queries

A query is *dynamic*. A query performs a new search and displays current information each time the query is run. For example, the list of students assigned to a homeroom may be different today than it was yesterday because a new student enrolled and was assigned to the homeroom.

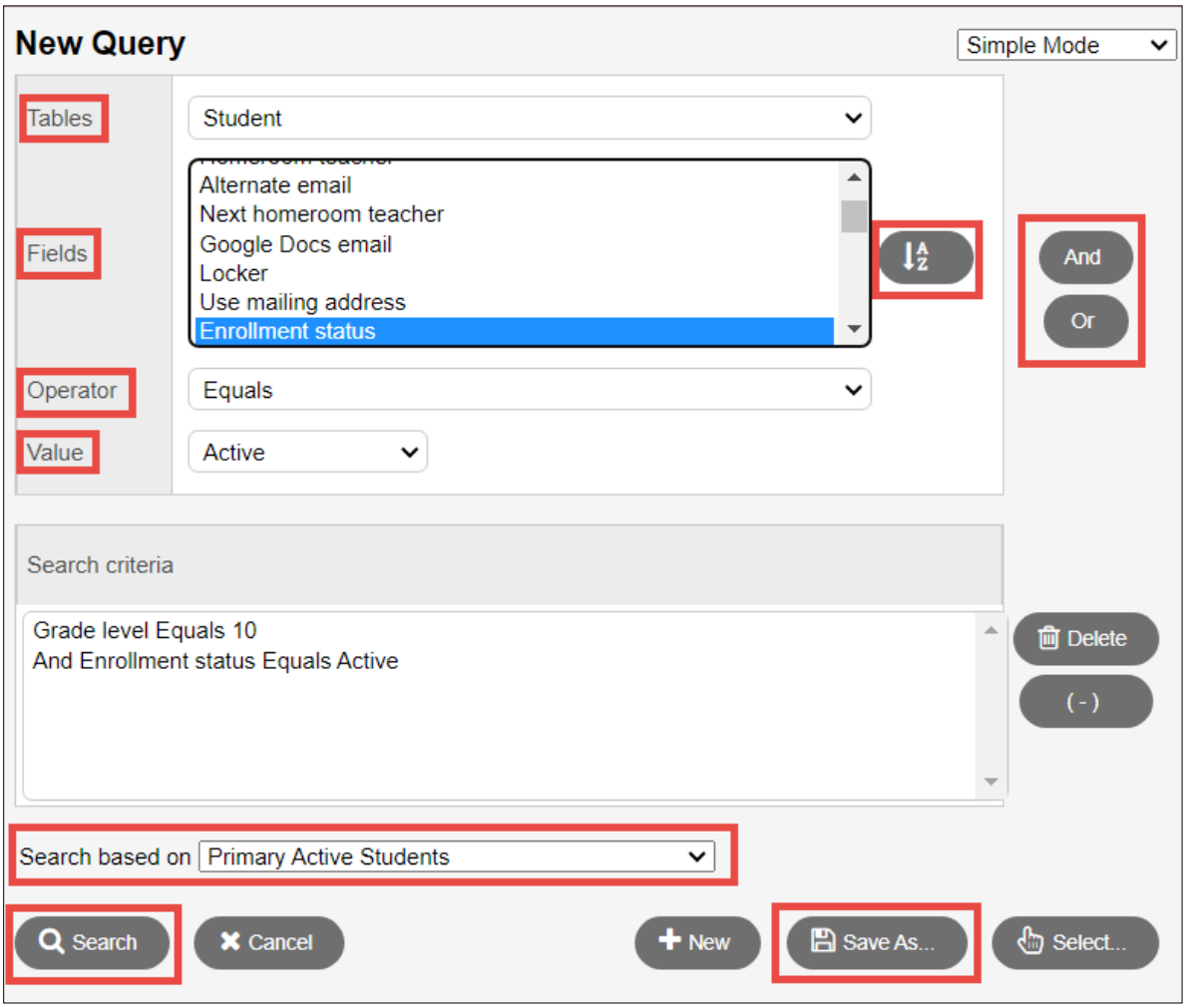
7.1 Creating a Simple Query

1. In the **Options** menu, select **Query**.
2. In the *New Query* window, use the following table to select appropriate fields:

Fields	Descriptions
Tables	Select the table where the search information resides. The selected table determines the selections in the Fields area. For example, if the Student table is selected, fields in the student details appear.
Fields	At Fields, select the field to be included in the search criteria. Note: Fields within each reference table are listed from most commonly used to least commonly used. To change this order to alphabetical, click the Alpha Sort button a→z
Operator	Select an appropriate operator. For example, if the search is for students with a specific year of graduation, select Year of graduation in the Fields box, and select the Equals operator.
Value	Enter the search value. In some cases, this may be a pick list or drop down menu.

3. Click **Add** to add the criteria to the Search criteria box. To add other criteria, select the **Table**, **Field**, and **Operator**, and enter the Value, if appropriate.
4. Click **And** or **Or** to determine if the students should meet the first criteria, the second criteria, or both to be included in the search.
5. Confirm the correct search criteria are displayed in the Search criteria box. To delete the criteria from this search, highlight it in the Search criteria box and click **Delete**.
6. In the **Search based on** field, use the drop-down to select which students should be included in the search.
7. Click the **Search** button to execute the search.

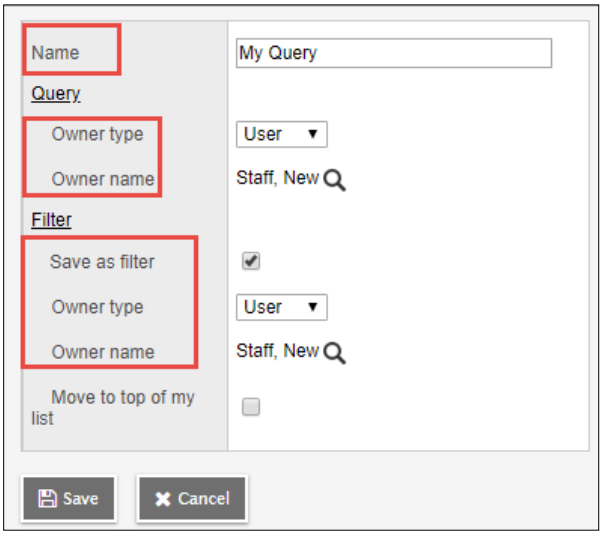
Once a query has been executed, the records matching the search criteria will be displayed on the screen. The upper right corner of the screen, above the list, will indicate that the records displayed are a custom selection. Use the icon to return the list to all records or another selection.



7.2 Saving a Query

If a query will be used frequently, it can be saved for quick retrieval.

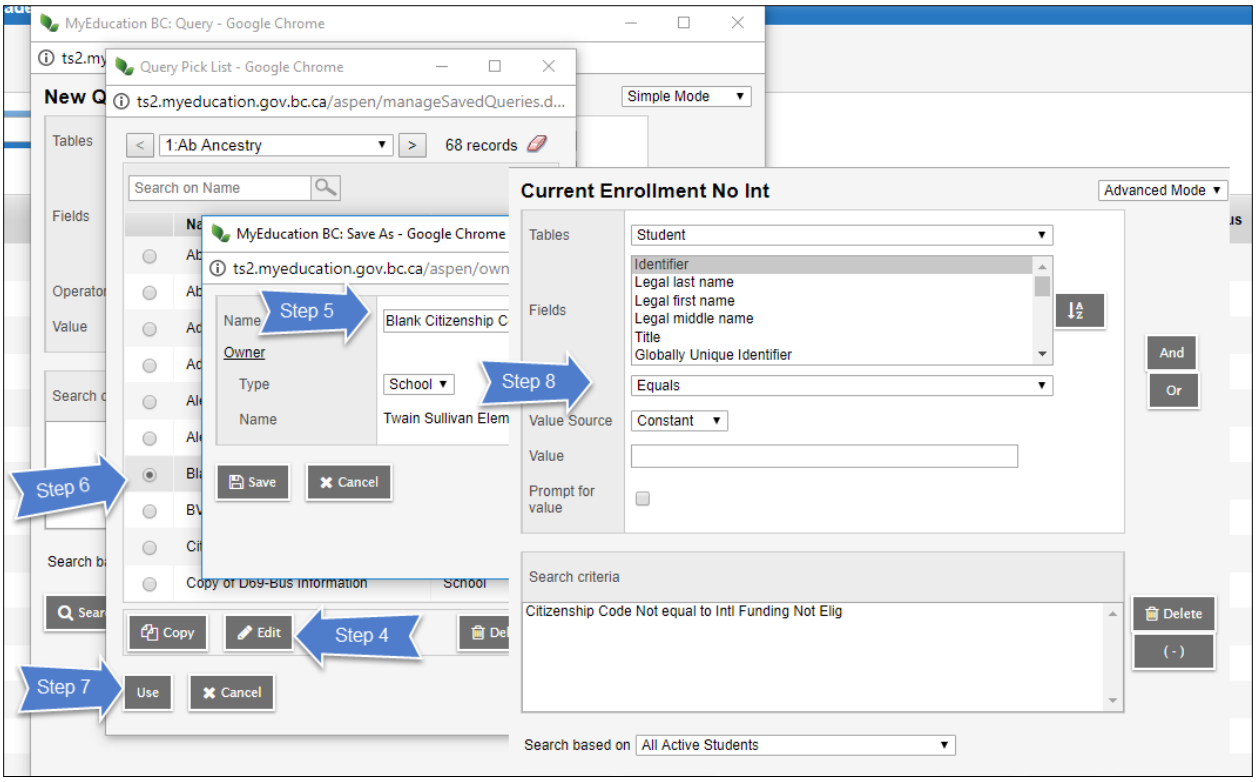
1. Create a query using the instructions above.
2. Click **Save as. . .** The *Save as* dialogue box displays.
   a. **Name:** Give the query a name that will make sense later. If it will be saved as a filter, it is best to keep the name concise.
   b. **Owner type:** Click the drop-down to select one of the following:
      - **User**: to give an individual user access to the query.
      - **School**: to give users at a school access to the query. User must have access to the school view to use this option.
      - **District**: to give all users in a district access to the query. User must have access to the district view to use this option.
   c. **Owner Name**: click the magnifying glass to change the owner of the query. The owner can edit a saved query.
   d. **Save as filter**: Select this checkbox to have this query automatically appear on the menu for all users who have access to it. If this checkbox is selected, the next three fields are accessible.
   e. **Filter Owner type:** Click the drop-down to select the owner type as appropriate. These options are defined the same as the **Query Owner Type** options.
   f. **Filter Owner name:** click the magnifying glass to change the owner of the query. The owner can edit a saved filter.
   g. **Move to the top of my list**: Checking this box will place the query at the top of the menu. If a query is first on the filter menu, it becomes the default filter for that screen.
3. Click **Save.**



7.3 Editing a Query

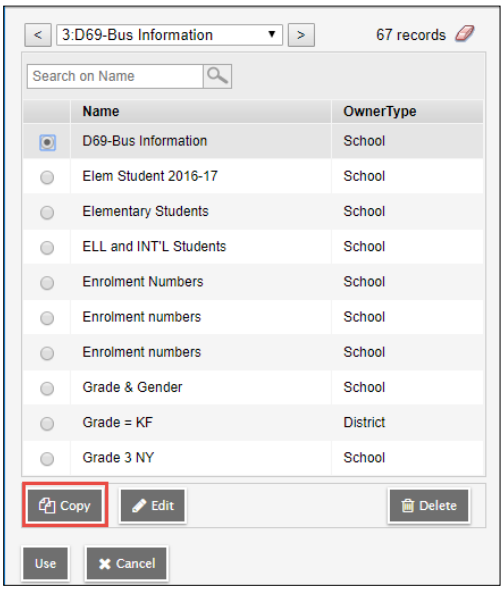
Users must have the appropriate permissions to edit the query.

1. In the **Options** menu, select **Query.**
2. In the *New Query* pop-up window, click the **Select** button. A list will pop up with all the queries.
3. Click the radio button beside the query to be edited.
4. Click **Edit**.
5. Adjust the **Name** and **Owner** fields, if necessary.
6. Click **Save.**
7. Ensure the query is still selected and click **Use.**
8. Adjust search criteria as necessary.
9. Click **Save**.



7.4 Copying a Query

Users can copy a query that contains elements they want and adjust it to suit their need.



1. In the **Options** menu, select **Query.**
2. In the *New Query* pop-up window, click the **Select** button. A list will pop up with all the queries.
3. Click the radio button beside the query to be copied.
4. Click **Copy**.
5. Give the new query a **Name** and **Owner** type.
6. Click **Save.**
7. Ensure the query is still selected and click **Use.**
8. Adjust search criteria as necessary.
9. Click **Save**.

7.5 Deleting a Query

If a query has become obsolete, it can be deleted

1. In the **Options** menu, select **Query.**
2. In the *New Query* pop-up window, click the **Select** button. A list of queries will pop up.
3. Click the radio button beside the query to be deleted.
4. Click **Delete**.
5. Click **Cancel** to close the query list popup.
6. Click **Cancel** to close the *New Query* window.

8.0 Snapshots

A snapshot is different from a filter. Where a filter is dynamic and always returns the latest data, a snapshot is a static list. It always displays the same records unless it is manually edited. Only the user who created the snapshot can add or remove students from it.

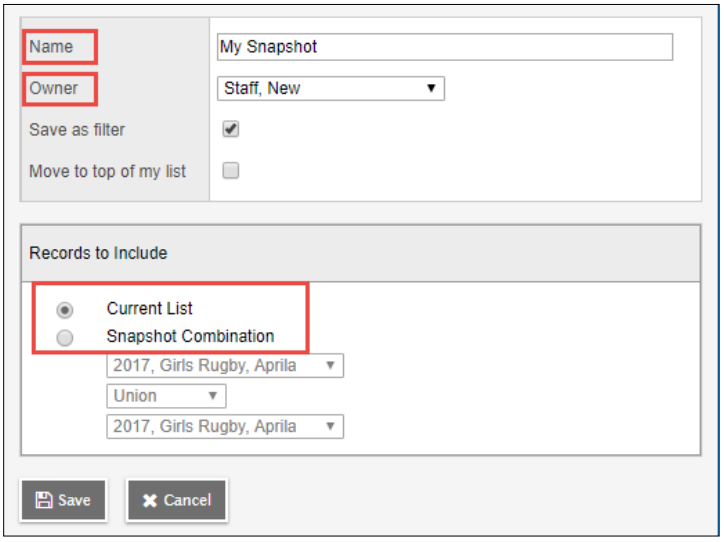
8.1 Creating and Deleting Snapshots

8.1.1 Creating a Snapshot

1. In the **School** view, click the **Student** top tab. Select the records to be included in the snapshot.

2. If records have been manually selected in a large list, be sure to go to the **Options** menu and click **Show Selected**. Users can also use a filter or query to isolate the records for a snapshot. Snapshots will include any records that appear on the current list.

3. In the **Options** menu, select **Snapshots.**
4. In the pop-up window, click the **New** button.
    a. **Name:** Give the snapshot a name that represents the data in the snapshot.
    b. **Owner:** Who will see and use this snapshot? If the user has district or school access, they have the ability to set this to all users with those views. If the user sees no other option, they are creating a user snapshot.
    c. **Save as filter:** If this is selected, the snapshot will appear in the filter menu under the icon.
    d. **Move to the top of my list**: If this is selected the snapshot will appear as the first item in the filter menu and will become the default filter for that screen.
5. In the **Records to Include** box, select one of the following:
    a. **Current List**: includes records selected on the list page.
    b. **Snapshot Combination**: this will combine two existing snapshots and is only available if two or more snapshots have already been defined. This provides 3 options:
        i. **Union**: Any records that appear in the first snapshot selected ***or*** the second snapshot selected. For example, for a snapshot of students who are in grade 12 **or** have a program of study, select **Union**.
        ii. **Intersection**: Only records that appear in both the first ***and*** the second snapshots selected. For example, for a snapshot of students who are both in grade 12 **and** have a program of study, select **Intersection**.
        iii. **Difference**: Any record that displays in the first snapshot selected, but not in the second. For example, for a snapshot of students who are in grade 12 but do not have a program of study, select **Difference**.
6. Click **Save**.



8.1.2 Removing a Snapshot from the Filter Menu

If a snapshot was saved as a filter in error, or is no longer needed as a filter, it can be removed from the filter menu.

1. Click on the icon and select **Manage Filters**.
2. In the *Manage Filters* window, click on the snapshot so it is highlighted.
3. Click the **Delete** button.
4. Click **Close**.

Note: Deleting the filter does not delete the snapshot behind it. The filter can be restored by creating a new filter and selecting the snapshot.

8.1.3 Deleting a Snapshot

If a snapshot has become obsolete, it can be deleted from the snapshot menu.

1. In the **Options** menu, select **Snapshots**.
2. Select the snapshot to be deleted.
3. Click **Delete.** Note that it warns the user that any filter associated with the snapshot will be deleted.
4. Click **OK.**

8.2 Add a Snapshot to a Student

Snapshots are static lists and will not update automatically when a new student meets the criteria the snapshot was based on.

8.2.1 Adding a Snapshot to a Student

1. In the **Student** top tab, select the student to be included in the snapshot.
2. Click the **Snapshots** side tab.
3. In the **Options** menu, select **Add.**
4. Select the snapshot from the list.
5. Click **OK.**

8.3 Removing a Snapshot from a Student

If a student no longer meets the criteria for the snapshot, a user may want to delete them from that snapshot.

8.3.1 To remove a snapshot from a student.

1. In the **Options** menu, select **Snapshots**.
2. Select the snapshot to be modified. Click **Use**. The list of students in the snapshot will appear.
3. Check the box beside the student(s) to be removed from the snapshot.
4. Click the **Snapshots** side tab.
5. In the **Options** menu, select **Delete.**
6. Click **OK.**

9.0 Menu Bar Tools

The menu bar provides several tools for filtering, displaying, sorting and exporting data in MyEducation BC. The menu tools are the same regardless of the top tab the user has selected, with the exception of the quick letter function on the Student top tab. The options that display when using these tools will vary depending on the top tab and side tabs selected.

9.1 Filters and Advanced Filter mode

The Filter functionality is used to determine the records that display on a page. Selecting the Filter icon displays a list of filters currently available to the user. This list is based on the top tab, side tab and leaf currently selected, as well as the security role(s) assigned to the user.

Filters are built from queries that provide a real time list of the students meeting the criteria defined in the query. For example: The Filter Homeroom = ? returns all the current students with the selected homeroom assigned. If a new student is assigned to the selected homeroom, they will immediately display in the filter list.

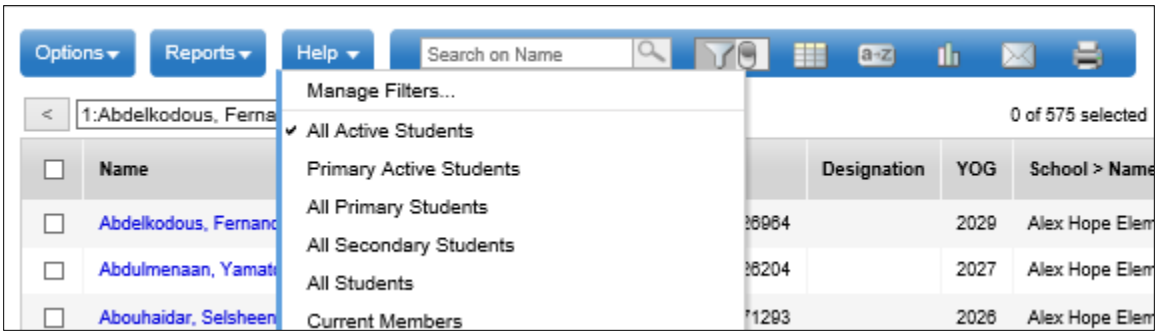
Filters can be created at the District, School or individual user level.

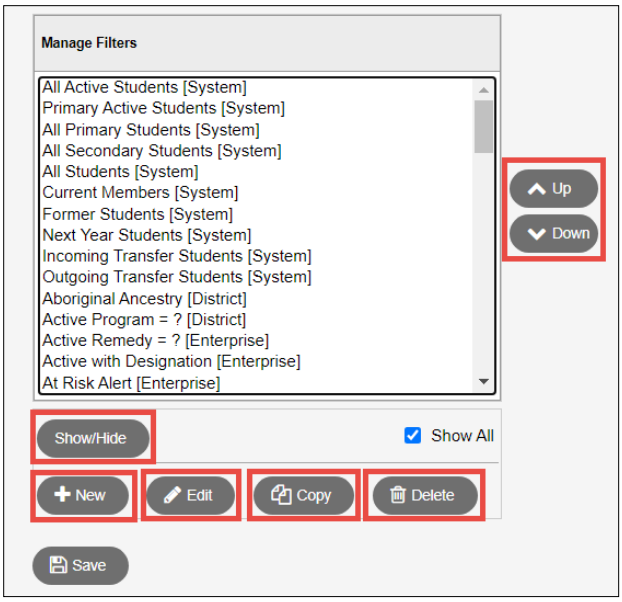
System Filter	Description
All Active Students	Primary Active, Active No Primary and Secondary Active Students
Primary Active Students	Primary students with a status of Active or Active No Primary.
All Primary Students	All Primary students for which this school is or was the last school of record, regardless of the current student Enrollment Status.
All Secondary Students	Students that have a secondary school association to this school, with a status of Active or Active No Primary.
All Students	All Primary students for which this school is or was the last school of record, regardless of the current student Enrollment Status, Active No Primary and Secondary students.
Current Members	All students with current admission dates, including students with secondary school associations that have a current start date. This filter does not include students with a future admission date, or students with future secondary school association start dates.
Former Students	Students who were withdrawn, but have a former school association to this school. If this association record is deleted, the student will no longer appear in the filter.
Next Year Students	Students with a Next School value field populated with the name of this school.

The filters that appear in the list have been created at the system, enterprise or district level.

Click the icon and select **Manage Filters.** In the *Manage Filters* pop-up window, users see the following in brackets beside the name of the filters:

a. **System**: these filters are part of the core application. They can be hidden or moved up or down in the list, but cannot be modified.
b. **Enterprise**: these filters have been created at the enterprise level and display for all districts and schools. They can be hidden or moved up or down in the list, but cannot be modified.
c. **District**: these filters have been created at the district level for the district level views. They can be hidden or moved up or down in the list, but cannot be modified unless the user has access to the District view.
d. **School**: these filters have been created either by a school user, or by a district user in the school view. They are visible to all users with access to the School view. These filters can only be modified or deleted by a school user or a district user with school view access.
e. **User**: these filters have been created by an individual user. They will only show in the list for the user who created them and therefore can only be modified or deleted by the user who created them.





9.1.1 Moving a Filter

A user can set the filter they use most often as the default for that screen by moving it to the top of the list.

1. Click the icon and select **Manage Filters . . .**
2. In the *Manage Filters* pop-up window, click on the name of the filter to be moved. It will be highlighted.
3. Click the Up or Down buttons to position the filter in the list. The filter at the very top of the list is the default filter when entering that screen.
4. Several filters can be moved at once by using Shift + click and using the Up or Down buttons.
5. Click **Close.**

9.1.2 Hiding a Filter

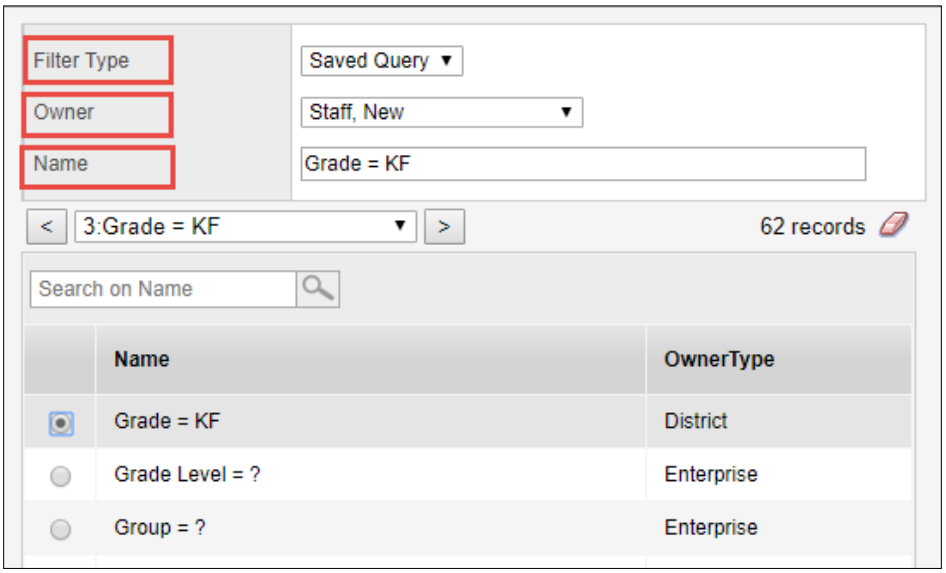
1. Click the icon and select **Manage Filters . . .**
2. In the *Manage Filters* pop-up window, click on the name of the filter to be hidden. It will be highlighted.
3. Click the Show/Hide button. If the **Show All** box is checked, the filter will still appear here, but is now greyed out. This means the filter will no longer appear in the list when the icon is clicked. The item can be restored at any time by clicking the Show/Hide button to put it back in the list. If the **Show All** box is not checked, the filters which have been hidden will no longer be visible. This checkbox will need to be enabled in order to restore a hidden filter.
4. Click **Close**.

9.1.3 Creating a New Filter

Filters are connected to queries and snapshots. Users can access those queries and create them as a filter by using the **New** button in the *Manage Filters* window.

1. Click the icon and select **Manage Filters . . .**
2. In the *Manage Filters* pop-up window, click the New button. A list of available queries will appear.
    a. **Filter Type**: This allows a filter to be created from an existing query or snapshot. Changing this selection will change the list of options below.
    b. **Owner:** Who will see and use this filter? If the user has district or school access, they will have the ability to set this filter for all users with those views. If the user sees no other selection, they are creating a User filter.
    c. **Name:** Give the filter a name that makes sense for its function.

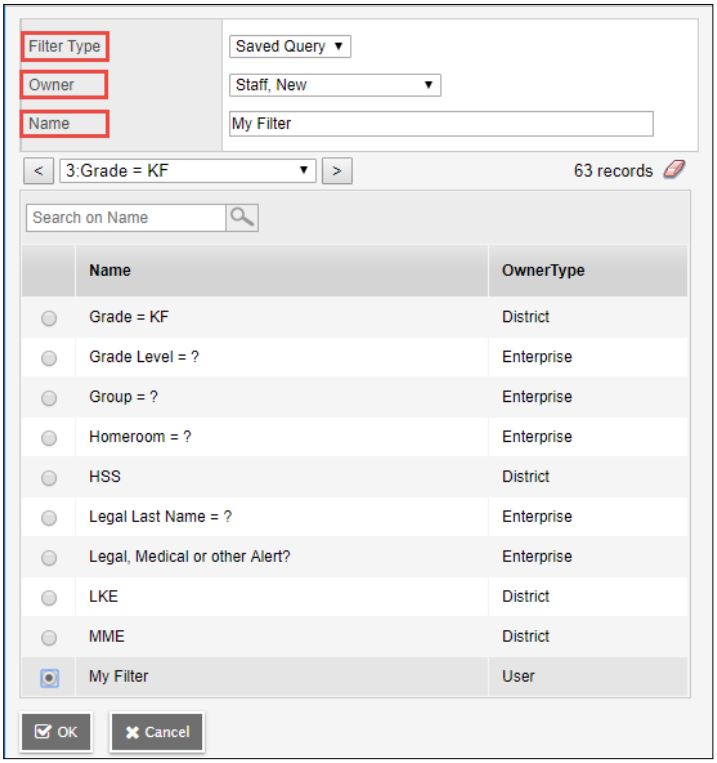
3. Click the radio button beside the query or snapshot in the list that the filter will be based on.
4. Click **OK**. The filter will now appear in the Manage Filters window and in the list below the icon for this screen.
5. Click **Close** on the *Manage Filters* window.



9.1.4 Editing a Filter

A user can only edit a filter that exists at the level of their user role view. In other words, a district user who has access to both district and school views can edit a *District* or *School* filter. A school user can edit a *School* filter because they have school view access. A user with staff view will only be able to edit their own *User* filters.

1. Click the icon and select **Manage Filters . . .**
2. In the *Manage Filters* pop-up window, click the Edit button.
3. In the pop-up window:
   a. **Filter Type**: This allows a filter to be changed from its current query or snapshot, to a new query or snapshot. Changing this selection will change the list of options below.
   b. **Owner:** Who will see and use this filter? If the user has district or school access, they will have the ability to set this filter for all users with those views. If the user sees no other selection, they are creating a User filter.
   c. **Name:** Give the filter a name that makes sense for its function.
4. Click **OK.**
5. Click **Close** on the *Manage Filters window.*

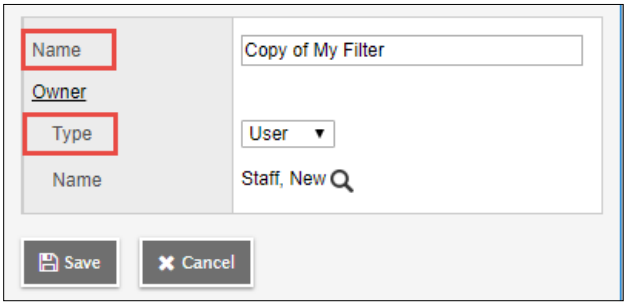


9.1.5 Copying a Filter

Because a filter is connected to a query or a snapshot, there are few reasons to copy a filter. A user may decide to copy a filter in order to rename it to something that is more meaningful.

1. Click the icon and select **Manage Filters . . .**
2. In the *Manage Filters* pop-up window, click on the name of the filter to be copied. It will be highlighted. Click on the Copy button.
3. In the pop-up window:
   a. **Name:** Give the filter a name that makes sense for its function.
   b. **Owner:** Who will see and use this filter? If the user has district or school access, they will have the ability to set this filter for all users with those views. If the user sees no other selection, they are creating a User filter.
4. Click **Save.**
5. Click **Close** on the *Manage Filters* window.

If a filter has been copied, it may be practical to hide or delete the original to avoid confusion.



9.1.6 Deleting a Filter

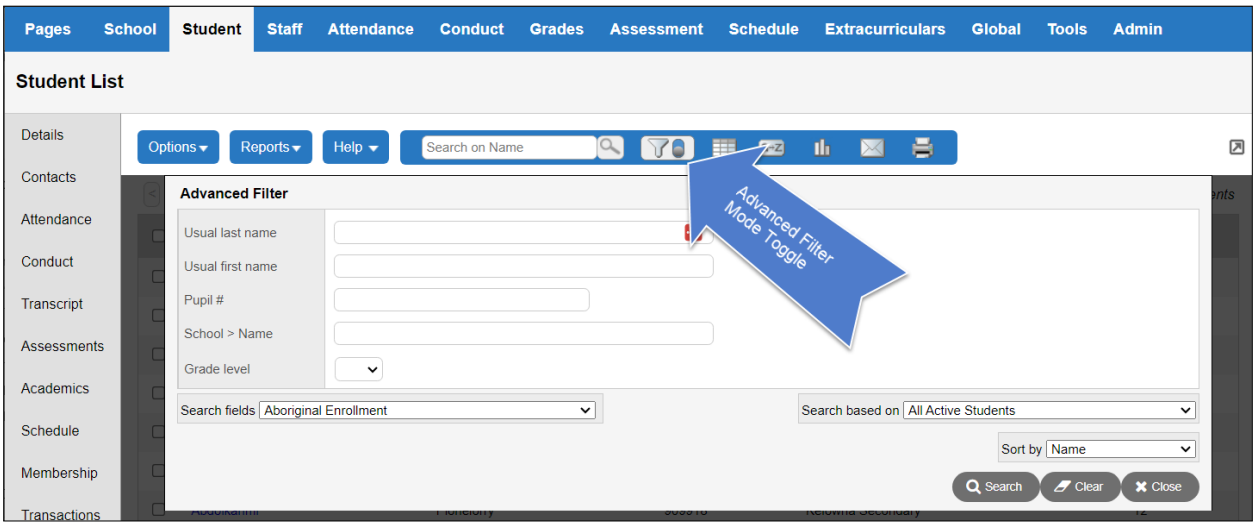
A user can only delete a filter that exists at the level of their user role view. In other words, a district user who has access to both district and school views can delete a *District* or *School* filter. A school user can delete a *School* filter because they have school view access. A user with staff view will only be able to delete their own *User* filters.

1. Click the icon and select **Manage Filters . . .**
2. In the *Manage Filters* pop-up window, click on the name of the filter to be deleted. It will be highlighted.
3. Click the Delete button.
4. Click **Close** on the *Manage Filters window*.

Deleting a filter does not delete the query behind it. If a filter is deleted in error, it can be restored by using the **Add** button.

9.1.7 Advanced Filter Mode

Some list pages now have an Advanced Filter mode. Use this mode to filter the list of records before Aspen loads data to the page. This saves time on pages with many records. Click the Advanced Filter mode toggle switch to turn it on or off. The system remembers your choice of whether to display the Advanced Filter on each list.



When the Advanced Filter mode is on, an overlay appears. The overlap displays the fields for that page's field set.

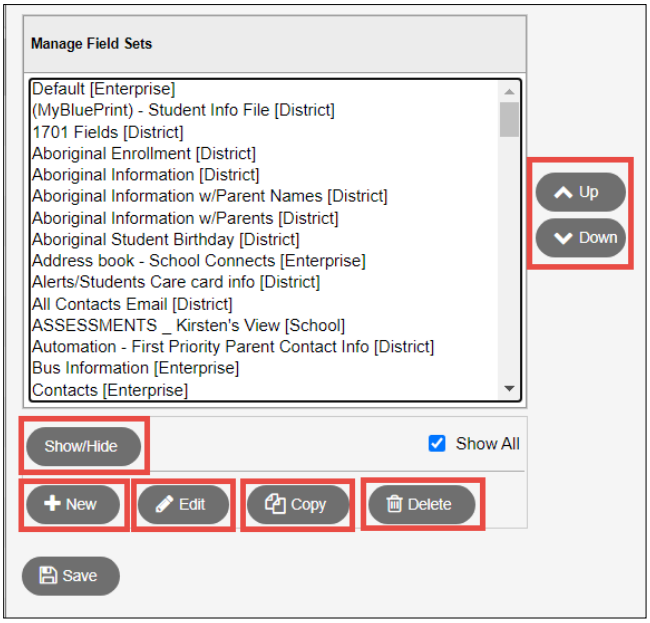
Enter values in the fields, and then click Search. MYEDBC displays the filtered records. See the Help topic " Use the Advanced Filter Mode" for more information.

9.2 Field Sets

Field sets display information in a list. By selecting a different field set, the user is choosing to display different columns of information for the same records in the list. Field sets are useful for grouping commonly used sets of information and then extracting those into a spreadsheet for analysis or manipulation.

The field sets that display in the list have been created at the Enterprise level or have been created by district users who may have created them for their schools.

1. Click the icon and select **Manage Field Sets . . .**
2. In the *Manage Field Sets* pop-up window, users may see the following in brackets beside the name of the field sets:
    a. **System**: these field sets are part of the core application. They can be hidden or moved up or down in the list, but cannot be modified.
    b. **Enterprise**: these field sets have been created at the enterprise level and display for all districts and schools. They can be hidden or moved up or down in the list, but cannot be modified.
    c. **District**: these field sets have been created at the district level for the district level views. They can be hidden or moved up or down in the list, but cannot be modified unless the user has access to the District view.
    d. **School**: these field sets have been created either by a school user, or been created by a district user in the school view. They will be visible to all users who have access to the School view. These field sets can only be modified or deleted by a school user or a district user with school view access.
    e. **User**: these field sets have been created by an individual user.



9.2.1 Moving a Field set

A user can set a field set they use the most as the default in that screen by moving it to the top of the list.

1. Click the icon and select **Manage Field Sets . . .**
2. In the *Manage Field Sets* pop-up window, click on the name of the field set to be moved. It will be highlighted.
3. Click the Up or Down buttons to position the field set in the list. Any field set placed at the very top of the list will become the default field set when entering the screen.
4. Several field sets can be moved at once by using Shift + click and using the Up or Down buttons.
5. Click **Close.**

9.2.2 Hiding a Field Set

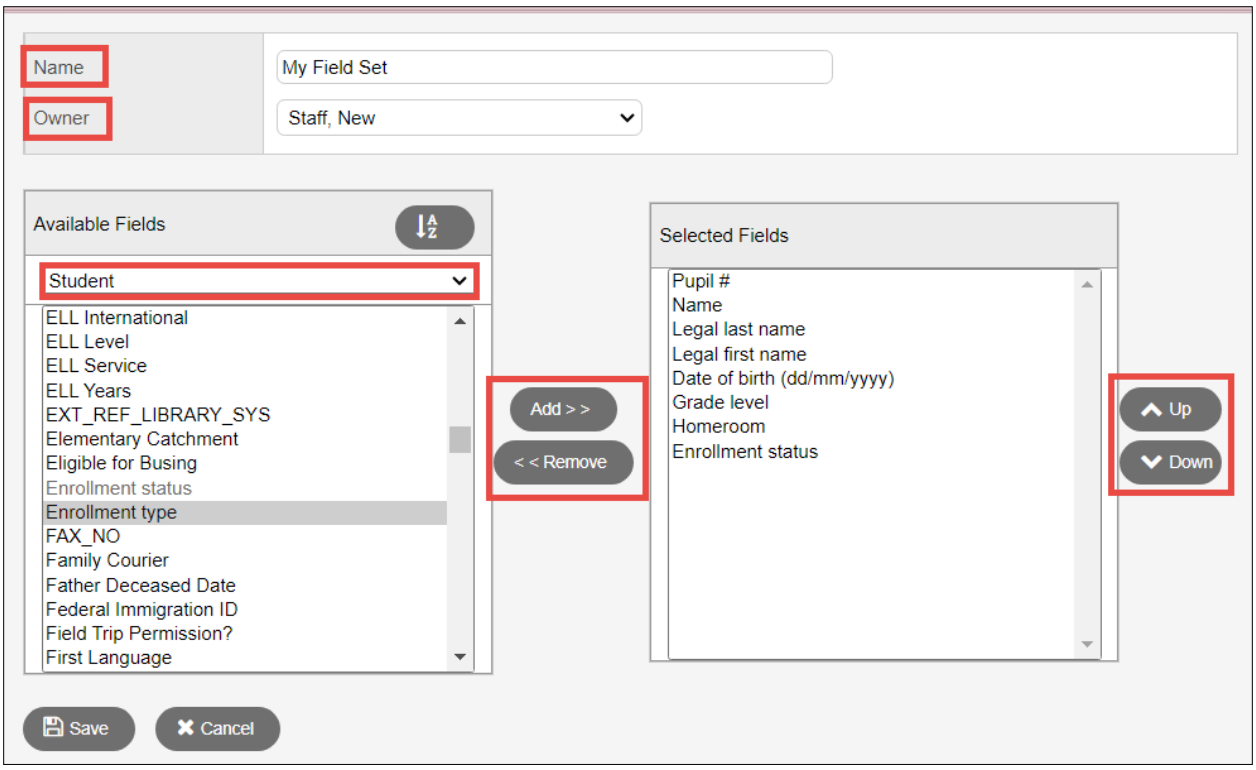
1. Click the icon and select **Manage Field Sets . . .**
2. In the *Manage Field Sets* pop-up window, click on the name of the field set to be hidden. It will be highlighted.
3. Click the Show/Hide button. If the **Show All** box is checked, the field set will still display here, but is now greyed out. This means the field set will no longer appear in the list when the icon is clicked. The item can be restored at any time by clicking the Show/Hide button to put it back in the list. If the **Show All** box is not checked, the field sets which have been hidden will no longer be visible. This checkbox will need to be enabled in order to restore a hidden field set.
4. Click **Close**.

9.2.3 Creating a New Field Set

1. Click the icon and select **Manage Field Sets . . .**
2. In the *Manage Field Sets* pop-up window, click the New button.
3. In the pop-up window:
   a. **Name**: Give the field set a name that makes sense for its data set.
   b. **Owner**: Who will see and use this field set? If the user has district or school access, they will have the ability to set this field set for all users with those views. If the user sees no other option, they are creating a User field set.
   c. In the **Available Fields** window, use the drop-down menu to select the table from containing the desired data fields. These are listed in the order most frequently used. If the user is having trouble finding a field, use the Sort A-Z button to sort them into alphabetical order.
   d. Click on the desired field to select so it is highlighted in the list.

e. Click the Add > > button. This will move the field into the **Selected Fields** window.
Note: Multiple fields from multiple tables can be selected for the same field set.

4. Once all fields have been selected, click **Save**.
5. Click **Close** on the *Manage Field Sets* window. The field set will now appear in the list for selection.

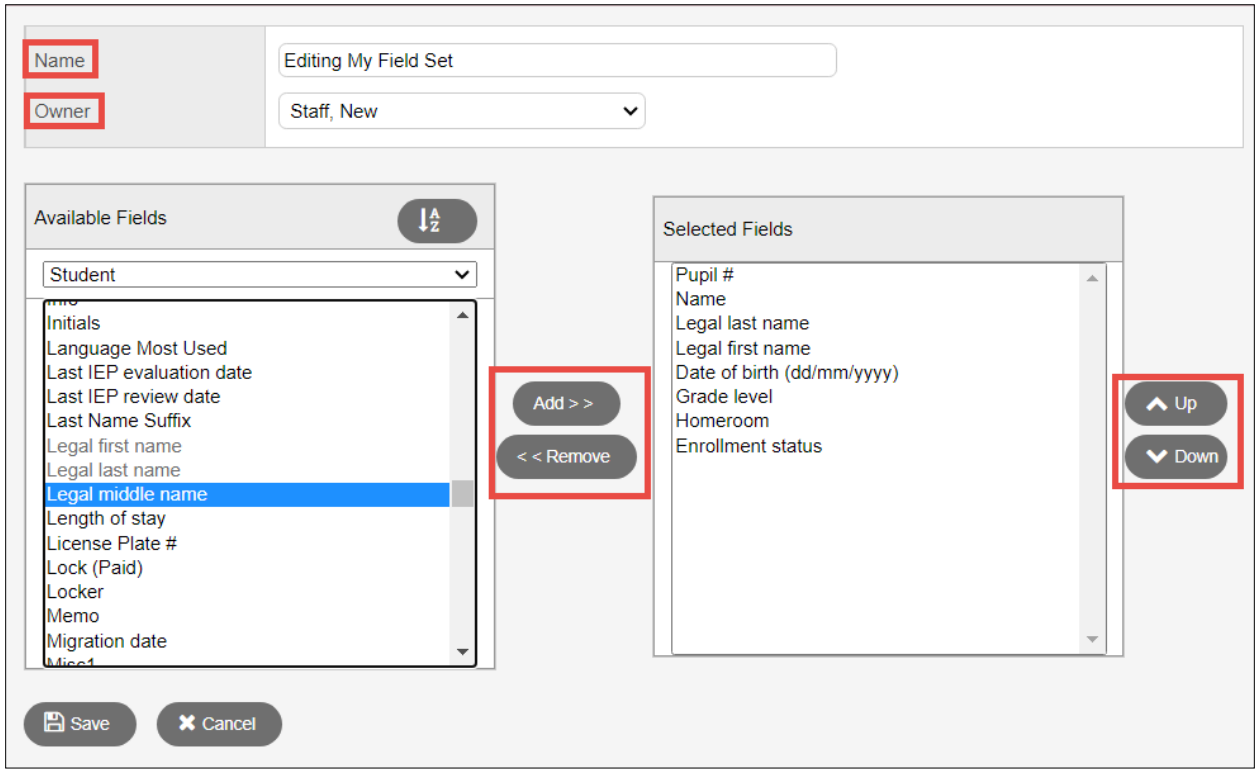


9.2.4 Editing a Field Set

A user can only edit a field set that exists at the level of their user role view. In other words, a district user who has access to both district and school views can edit a *District* or *School* field set. A school user can edit a *School* field set because they have school view access. A user that only has staff view will only be able to edit their own *User* field sets.

1. Click the icon and select **Manage Field Sets . . .**
2. In the *Manage Field Sets* pop-up window, click on the name of the field set to be edited. It will be highlighted.
3. Click the Edit button.
4. In the pop-up window:
   a. **Name**: Enter the new name for the field set, if appropriate.
   b. **Owner:** Who will see and use this field set? If the user has district or school access, they will have the ability to set this field set for all users with those views. If the user sees no other selection, they are creating a User field set.

5. In the *Available Fields* window, click the fields of information to add to the field set. Click the Add > > button. Alternatively, in the *Selected Fields* window, click the fields of information to be removed from the field set. Click the < < Remove button.
6. Click **Save**.
7. Click **Close** on the *Manage Field sets* window.

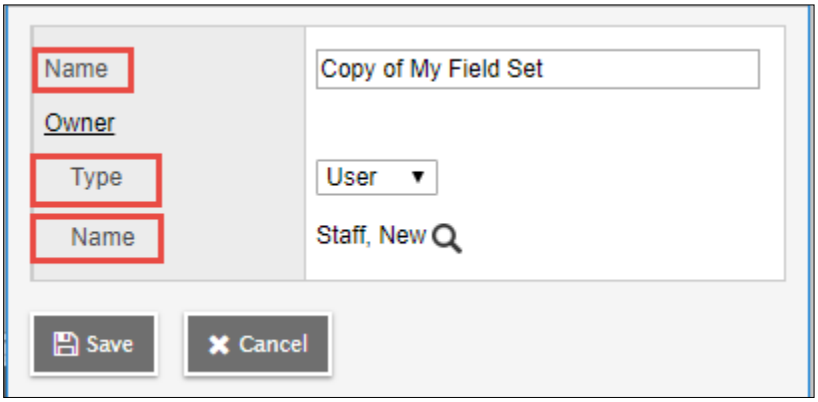


9.2.5 Copying a Field Set

A user may see a field set in the list that suits their needs, but would like to add or remove some information from it. If the user does not own the field set, a copy can be made and adjusted to suit the need.

1. Click the icon and select **Manage Field Sets . . .**
2. In the *Manage Field Sets* pop-up window, click on the name of the field set to be copied. It will be highlighted.
3. Click the Copy button.
4. In the pop-up window:
   a. **Name:** Give the field set a name that makes sense for its data set.
   b. **Owner:** Who will see and use this field set? If the user has district or school access, they will have the ability to set this field set for all users with those views. If the user sees no other selection, they are creating a User field set.
5. Click **Save.**
6. Click **Close** on the *Manage Field sets* window.

If a field set has been copied, the user may want to consider hiding or deleting the original to avoid confusion or duplication in the field set list.



9.2.6 Deleting a Field Set

A user can only delete a field set that exists at the level of their user role view. In other words, a district user who has access to both district and school views can delete a *District* or *School* field set. A school user can delete a *School* field set because they have school view access. A user that only has staff view will only be able to delete their own *User* field sets.

1. Click the icon and select **Manage Field Sets . . .**
2. In the *Manage Field Sets* pop-up window, click on the name of the field set to be deleted. It will be highlighted.
3. Click the Delete button.
4. Click **Close** on the *Manage Field Sets* window.

9.3 Sorts

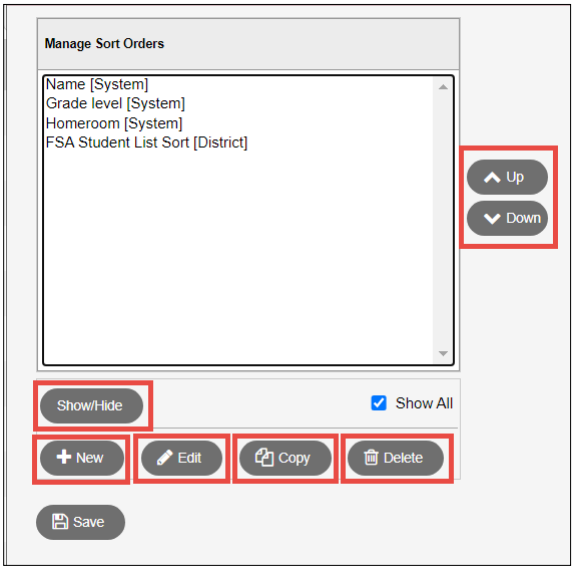
There are different ways to sort data in a field set, which are defined below. The options for sorting data in a field set are:

- Click the header of a column of data, a triangle displays pointing up or down in the column header to indicate the sort column and order. The field set sorts by the data in that column, opposite to its original sort order. Clicking the header again sorts the data back to its original order. This function can be used for multi-level sorts of up to 3 columns of data at a time. For example: clicking the *Gender* column in the **Student** top tab, then clicking the *Pupil #* column, then the *Grade* column, the grade would be the primary sort. Data displayed will be in order by *Grade*, then by *Pupil #*, then by *Gender*.

- Use the a→z icon, which simply sorts the data in the field set by the list value chosen for the sort. The sort icon can also be used to set any sort back to the default.

The field sets that appear in the list already have been created at the Enterprise level or by district users who may have created field sets for their own schools.

1. Click the a→z icon and select **Manage Sort Orders. . .**
2. In the *Manage Sort Orders* pop-up window, the following will appear in brackets beside the name of the field sets:
   a. **System**: these sort orders are part of the core application. They can be hidden or moved up or down in the list, but cannot be modified.
   b. **Enterprise**: these sort orders have been created at the enterprise level and appear for all districts and schools. They can be hidden or moved up or down in the list, but cannot be modified.
   c. **District**: these sort orders have been created at the district level for the district level views. They can be hidden or moved up or down in the list, but cannot be modified unless the user has access to the District view.
   d. **School**: these sort orders have been created either by a school user, or been created by a district user in the school view. They will be visible to all users who have access to the School view. These sort orders can only be modified or deleted by a school user or a district user with school view access.



9.3.1 Moving a Sort Order

A user can set the sort order they use the most as the default in that screen by moving it to the top of the list. Users can also create custom sorts.

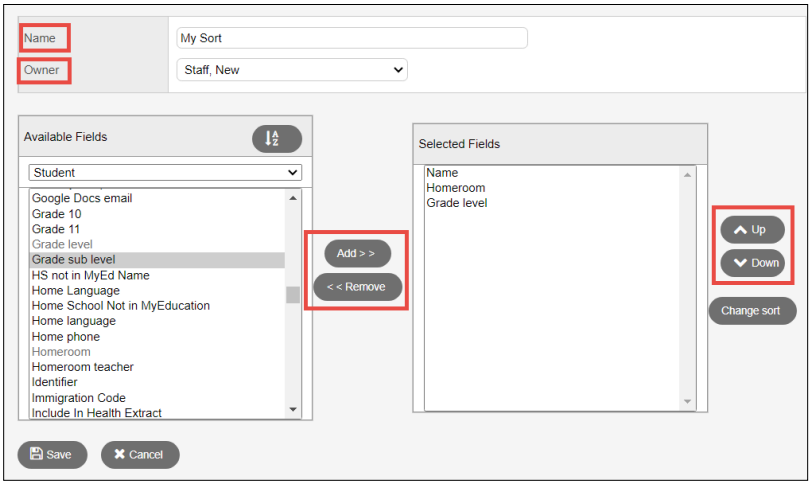
1. Click the a→Z icon and select **Manage Sort Orders . . .**
2. In the *Manage Sort Orders* pop-up window, click on the name of the sort order to be moved. It will be highlighted.
3. Click the Up or Down buttons to position the field set in the list. Any sort order placed at the very top of the list will become the default sort order when entering the screen.
4. Several sort orders can be moved at once by using Shift + click and using the Up or Down buttons.
5. Click **Close.**

9.3.2 Hiding a Sort Order

1. Click the a→Z icon and select **Manage Sort orders . . .**
2. In the *Manage Sort orders* pop-up window, click on the name of the sort order to be hidden. It will be highlighted.
3. Click the Show/Hide button. If the **Show All** box is checked, the sort order will still appear here, but is now greyed out. This means the sort order will no longer appear in the list when the a→Z icon is clicked. The item can be restored at any time by clicking the Show/Hide button to put it back in the list. If the **Show All** box is not checked, the sort orders which have been hidden will no longer be visible. This checkbox will need to be enabled in order to restore a hidden sort order.
4. Click **Close**.

9.3.3 Creating a New Sort Order

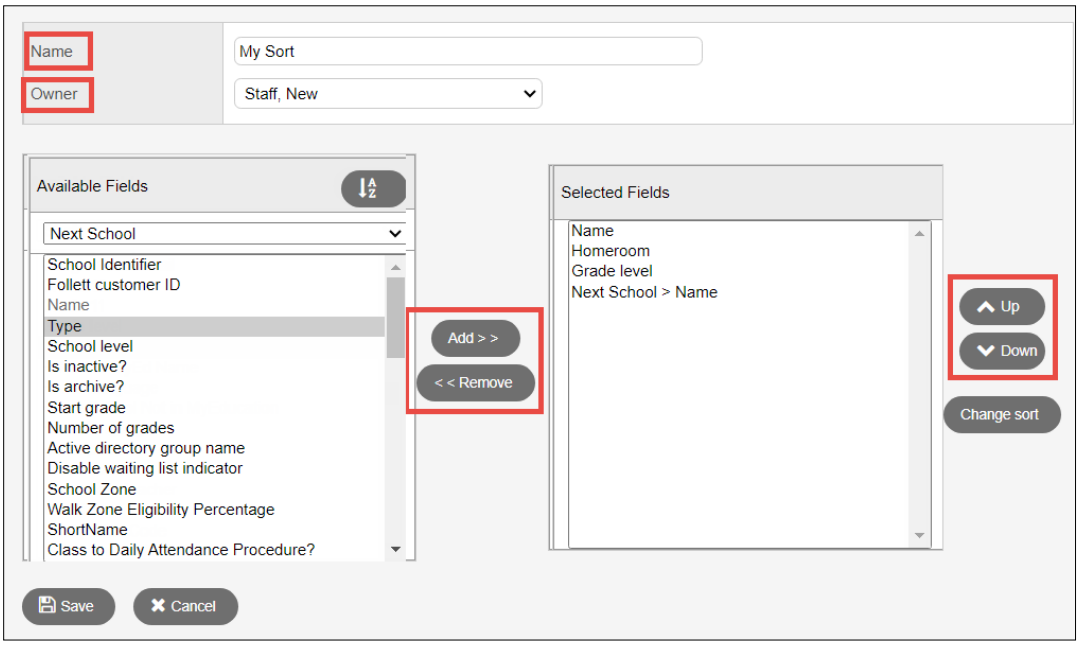
1. Click the a→z icon and select **Manage Sort Orders . . .**
2. In the *Manage Sort Orders* pop-up window, click the New button.
3. In the pop-up window:
   a. **Name**: Give the sort a name that makes sense for its function.
   b. **Owner**: Who will see and use this sort? If the user has district or school access, they will have the ability to set this sort for all users with those views. If the user sees no other selection, they are creating a User sort.
   c. In the **Available Fields** window, use the drop-down menu to select the table from which to sort fields. These are listed in the order most frequently used. To help find a field, use the Sort A-Z button to sort them into alphabetical order.
   d. Click on the field to select it. It will be highlighted in the list. Click the Add > > button. This will move the field into the **Selected Fields** window.
   Note: Multiple fields from multiple tables can be selected or the same field set.
4. Once all fields have been selected, click **Save**.
5. Use the Up and Down buttons to arrange the fields in the desired sort order. The Change sort button will cause (desc) to appear beside the field highlighted when clicked. This means the data in that field will be sorted in reverse (descending) order when this new sort is applied to a field set.
6. Click **Close** on the *Manage Sort Orders* window. The sort order will now display in the list for selection.



9.3.4 Editing a Sort Order

A user can only edit a sort order that exists at the level of their user role view. In other words, a district user who has access to both district and school views can edit a *District* or *School* sort order. A school user can edit a *School* sort order because they have school view access. A user with staff view will only be able to edit their own *User* sort orders.

1. Click the a→z icon and select **Manage Sort Orders . . .**
2. In the *Manage Sort Orders* pop-up window, click on the name of the sort order to be edited. It will be highlighted.
3. Click the Edit button.
4. In the pop-up window:
   a. **Name**: Enter the new name for the sort order, if appropriate.
   b. **Owner:** Who will see and use this sort order? If the user has district or school access, they will have the ability to set this sort order for all users with those views. If the user sees no other selection, they are creating a User sort order.
5. In the *Available Fields* window, click the fields of information to be added to the sort order. Click the Add > > button. Alternatively, in the *Selected Fields* window, click the fields of information to be removed from the sort order. Click the < < Remove button.
6. Click **Save**.
7. Click **Close** on the *Manage Sort Orders* window.



9.3.5 Copying a Sort Order

A user may see a sort order in the list that suits their needs, but wants to add or remove some information from it. If the user does not own the sort order, a copy can be made and adjusted to suit the need.

1. Click the a→z icon and select **Manage Sort orders . . .**
2. In the *Manage Sort orders* pop-up window, click on the name of the sort order to be copied. It will be highlighted.
3. Click the Copy button.
4. In the pop-up window:
   a. **Name:** Give the sort order a name that makes sense for its data set.

b. **Owner:** Who will see and use this sort order? If the user has district or school access, they will have the ability to set this sort order for all users with those views. If the user sees no other selection, they are creating a User sort order.

5. Click **Save.**
6. Click **Close** on the *Manage Sort Orders* window.

If a sort order has been copied, it may be practical to hide or delete the original to avoid confusion.

9.3.6 Deleting a Sort Order

A user can only delete a sort order that exists at the level of their user role view. In other words, a district user who has access to both district and school views can delete a *District* or *School* sort order. A school user can delete a *School* sort order because they have school view access. A user with staff view will only be able to delete their own *User* sort orders.

1. Click the a→z icon and select **Manage Sort Orders . . .**
2. In the *Manage Sort Orders* pop-up window, click on the name of the sort order to be deleted. It will be highlighted.
3. Click the Delete button.
4. Click **Close** on the *Manage Sort Orders* window.

9.4 Quick Charts

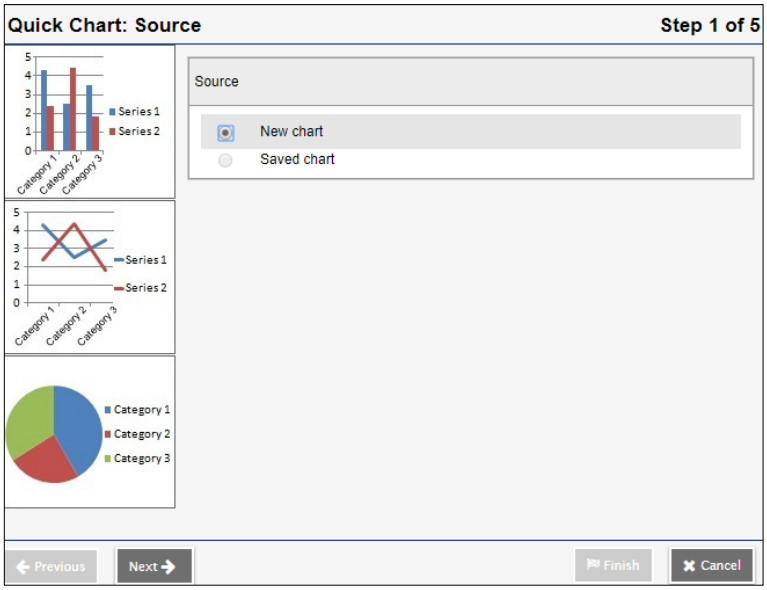
Charts provide an organized way to represent data visually. The Quick Chart feature enables the user to create bar, line, and pie charts from any standard list page. These charts can be saved for future use. Users with privileges to manage school and/or district resources can create charts to share at both the district and school levels.

Click the icon to access the following options:

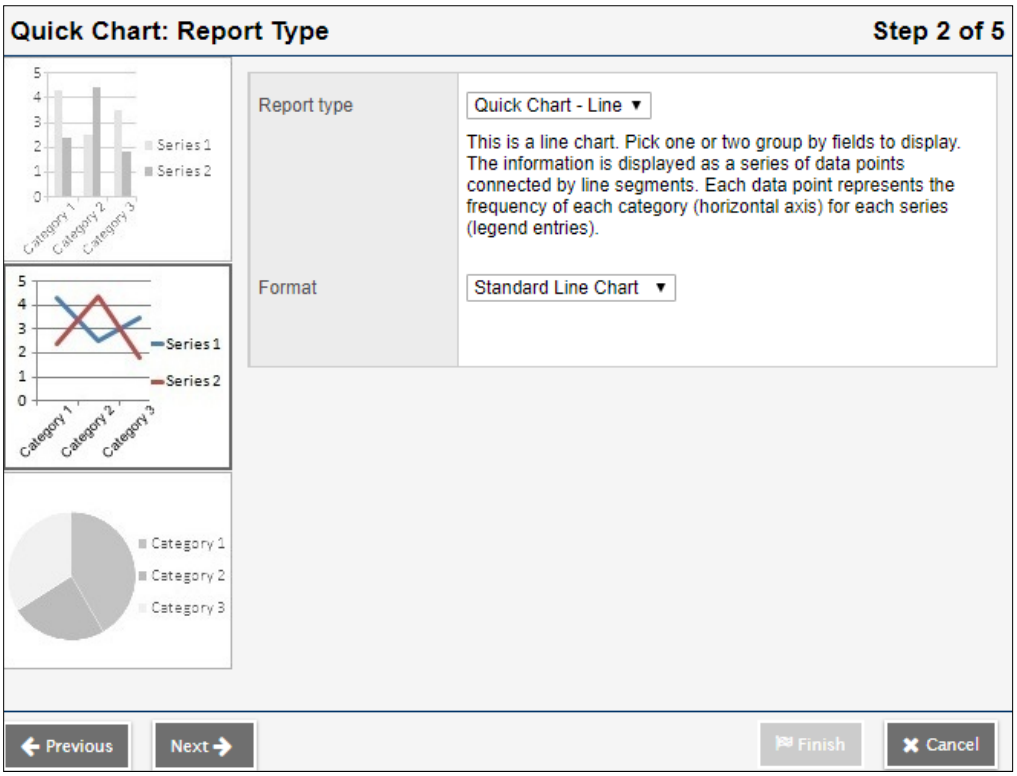
- **Create Quick Chart**: Brings up the Quick Chart Wizard, which allows the user to customize many different areas of the resulting chart.
- **Bar Chart**: Brings up a streamlined Quick Chart screen, which requests only minimal information required to create the bar chart.
- **Line Chart**: Brings up a streamlined Quick Chart screen, which requests only minimal information required to create the line chart.
- **Pie Chart**: Brings up a streamlined Quick Chart screen, which requests only minimal information required to create the pie chart.

9.4.1 To Create a Quick Chart:

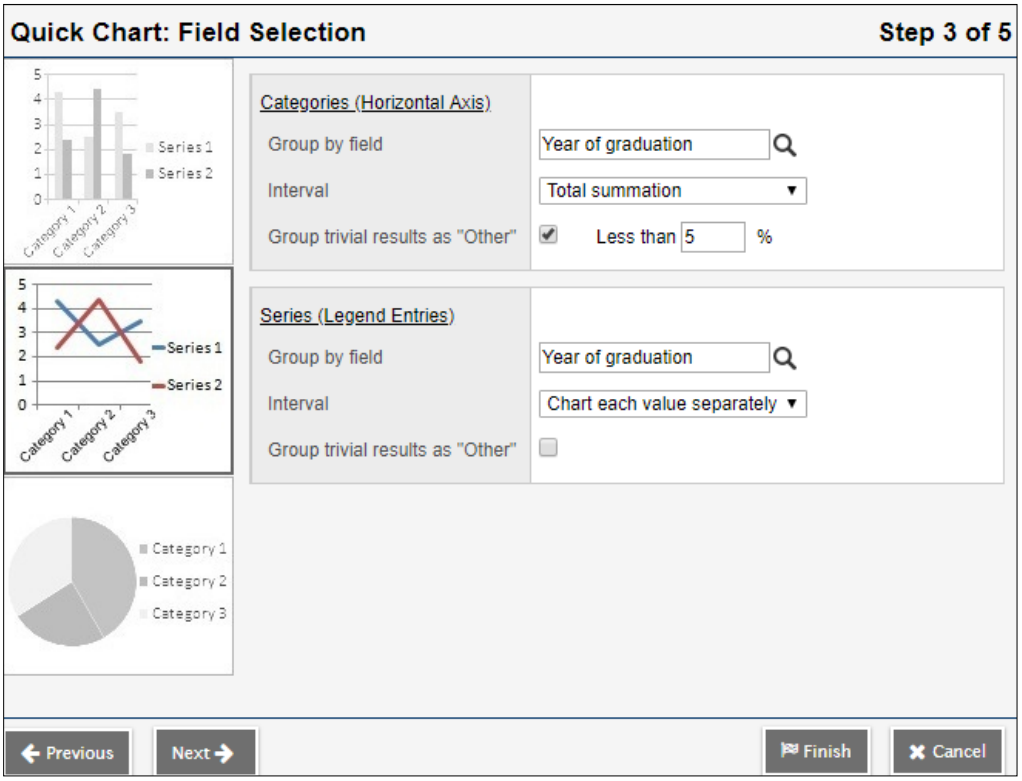
1. Click the icon and select **Create Quick Chart** to open the *Quick Chart* wizard, or select *Quick Chart* from the **Reports** menu. The *Create Quick Chart wizard* displays:



2. *Step 1: Source*.
    a. Select **New chart**.
    b. Click **Next**.
3. *Step 2: Report Type*
    a. Click the **Report Type** drop-down to select one of the following:
        i. **Quick Chart—Bar**
        ii. **Quick Chart—Line**
        iii. **Quick Chart—Pie**
4. Click the **Format** drop-down to select the format for the chart. Select one of the following:
    a. Standard
    b. Enhanced



5. *Step 3: Field Selection*.
    a. In the **Categories (Horizontal Axis)** box, click the icon at **Group by field** and make a selection. The user can choose from the tables and fields that are related to the records in the current list. The **Categories (Horizontal Axis)** box, sometimes called the independent variable, sets the data to measure. If the choice is a Numeric, Date or Time field, additional options appear to further organize the data which will be displayed on the chart.



b. For bar and line charts, a **Series (Legend Entries)** box is available. Click the icon at the **Group by field** and make a selection. Series groups appear in a legend to the right of the chart and provide a color-coded guide to data shown in the chart.

Note: Bar and line charts do not require both a category and series to be selected. Charts that exclude a category will not have x-axis labels. Charts that exclude a series will not include a legend.

6. The Interval drop-down menu for numeric has the following options:
   a. **Chart each value separately**: Each numeric value gets its own data point.
   b. **Interval group**: The **Interval** field groups the results according to the number entered in the **Interval group size** field. For example, to display the group Year of Graduation in the chart in pairs, a 2 would be entered in this field.
   The **Interval group size** displays. The value in this field sets the number of data points that get combined into a single category.
   c. **Interval group summations**. The **Interval group size** displays. The value in this field sets the number of data points that get combined into a single category.
   d. **Total summation**: Sums the values of the Group by field.
7. If the list of data being charted contains trivial cases which should be excluded from the chart, the option **Group trivial results as "Other"** is provided. Select this checkbox if the users wants to group all data points of less than a certain percent together into a single point called Other. For example, if the user is only concerned with viewing the most common conduct codes, select this option and enter a value of 5% in the Less

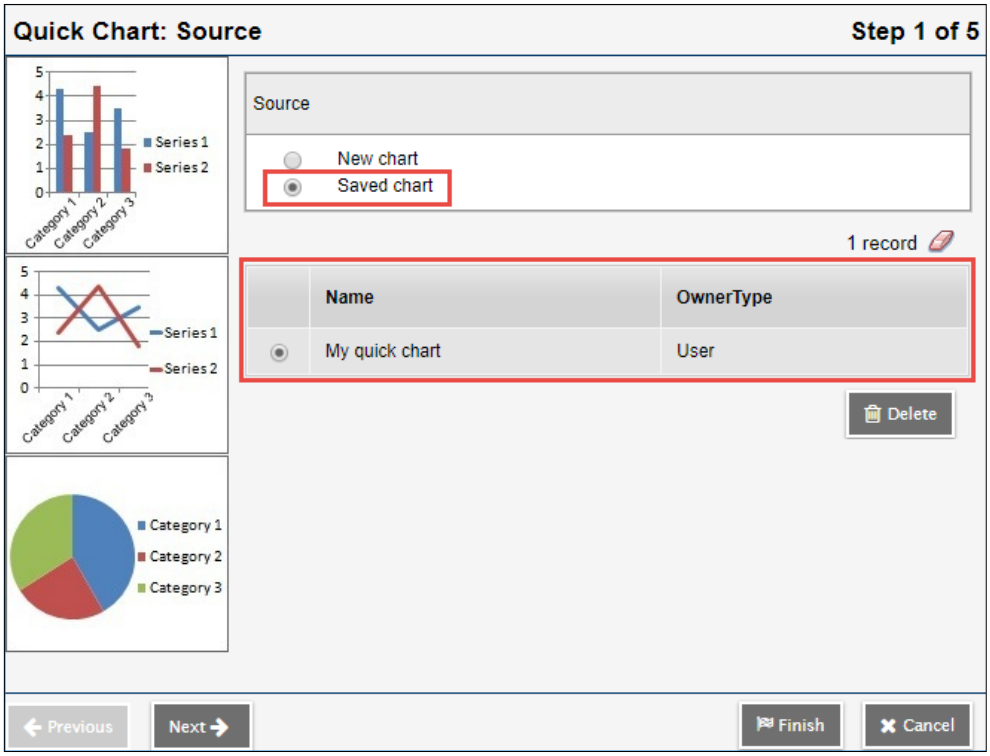
than % field. This will group all codes which total less than 5% of the total data into a single Other group.

Note: This option can only be used in the Categories ***or*** Series, not both.

8. Click **Next** to continue the wizard and set chart header and footer display options.
9. Click **Finish** to create the chart.
   Note: The **Finish** button can be clicked at any point in the wizard. New charts use the default format options if **Finish** is clicked at any point before the final step in the wizard.

9.4.2 To Use a Saved Quick Chart

1. Click the icon and select **Create Quick Chart** to open the *Quick Chart* wizard, or select *Quick Chart* from the **Reports** menu. The *Create Quick Chart wizard* displays:

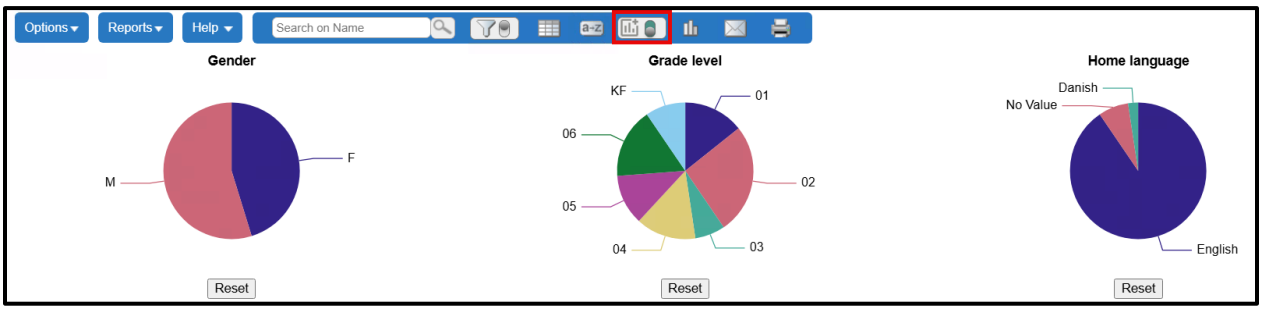


2. *Step 1: Source*. Click **Saved report.** A table of saved Quick Charts displays in the dialog box. Select the Quick Chart to be viewed or edited.
3. Click **Next** to continue editing, or click **Finish** to show the chart.

9.5 Interactive Analytics

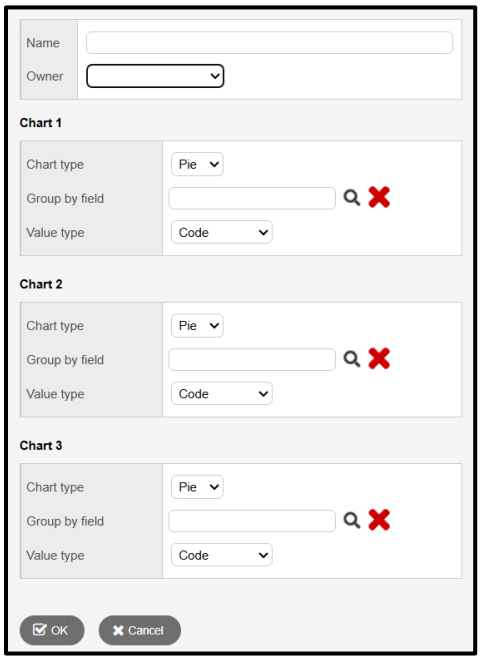
Interactive Analytics lets users create and view data sets using current information in MyEducation BC. A data set can display up to three categories of information at the same time, allowing users to review patterns and identify records that may require attention or planning.

Each category displays as a pie, bar or line chart. Users can click a slice of any chart to refresh the list and display only the associated records. Additional chart selections can be applied to narrow the list further.



9.5.1 To create an Interactive Analytics data set:

- On a screen with the List layout, click the Interactive Analytics menu icon then select Manage Interactive Analytics.
- Click +New. The New Interactive Analytics pop-up appears.



- Enter a Name for the data set.
- Use the Owner drop-down to select who will have access to the data set.
- The Chart type defaults to Pie.

- At Group by field, click the search icon, select an Available Field, and then click OK.
- Use the Value type drop-down to select how the data should display, such as by Code or Description.
- Repeat the Group by field and Value type selections for Chart 2 and Chart 3, if needed.
- Click OK.
- Click Save.
- To view the data set, click the Interactive Analytics menu icon and select the saved data set from the drop-down list.

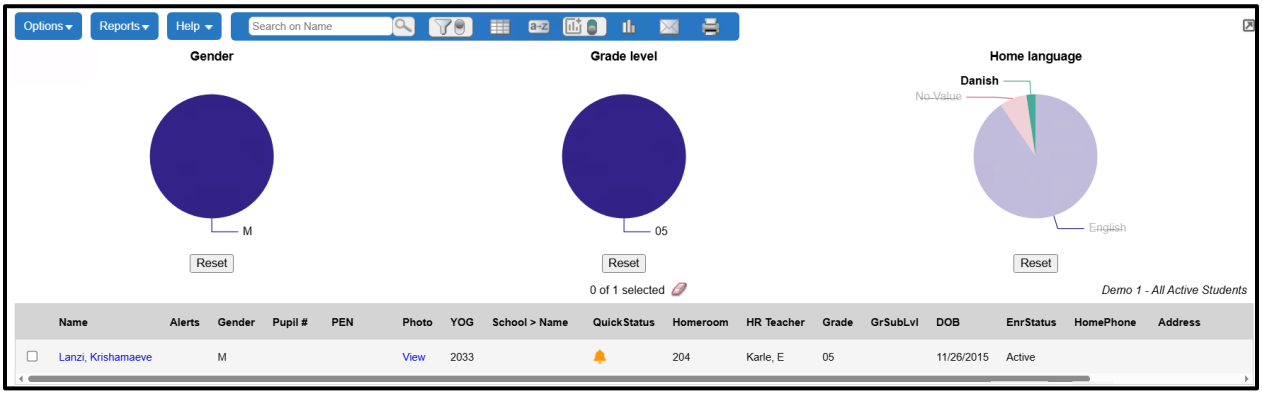
Note: The Interactive Analytics toggle in the menu bar must be in the on position for data sets to display on the page. Click Reset to return to the original data set.

9.5.2 Example: Using Interactive Analytics to narrow a student list

An administrator wants to review Grade 5 male students whose home language is Danish. From the Student top tab, they open the Interactive Analytics menu and create a data set using the following chart selections:

- Chart 1: Gender
- Chart 2: Grade level
- Chart 3: Home Language

To narrow the list, click the 5 slice in the Grade level chart, click the M slice in the Gender chart, and then click the Danish slice in the Home Language chart. The page refreshes after each selection to show only the records that match the selected criteria.



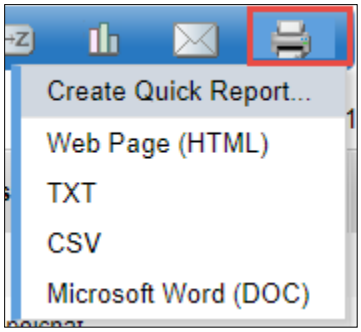
Users can hover over a chart slice to view the number of records and the percentage of the total represented by that slice.

9.6 Quick Print

Users can generate a **Quick Print** using the icon in the menu bar on any list page.

9.6.1 To generate a Quick Print using the Quick Print icon:

1. Go to the list page containing the type of data to be reported on.
2. Select the records to be included in the report.
3. If individual records have been manually selected from a large list, be sure to go to the **Options** menu and click **Show Selected**. Users can also use a filter or query to isolate the records to report on. Quick Prints include any records that appear on the current list.
4. Click the Quick Print icon in the menu bar.



5. Select one of the format options.
   a. **Web Page (HTML)**: to view the information in an HTML file.
   b. **CSV**: to view the information in a text file that separates each field with a comma. If saved, the file will have a .CSV extension
   c. **TXT**: to view the information in a text file that separates each field with a comma. If saved, the file will have a .TXT extension.
   Note: The two comma-separated values formats (CSV and TXT) create identical files; the only difference is the file extension. Some Web browsers only handle one extension properly.
   d. **Microsoft Word (DOC)**: to view the information in a Word document.

Note: Different browsers handle quick prints in different ways. Users may need to change browser settings to allow downloads, or use shortcut keys such as Ctrl + S to save the data prior to opening it.

9.6.2 Maximize & Minimize

Users can click on these icons to hide top tabs to allow more records per page to be visible or to return top tabs to their view.

10.0 Quick Reports

Quick Reports provide an opportunity for a user to create a customized report that contains specific data elements from one or more tables. If the report is something that would be run multiple times or by multiple users, a Quick Report can be created and saved, then selected from the list as needed.

Quick reports can be created in different areas of the application with elements that are relevant to the chosen area (top tab and side tab) of the application.

10.1 Creating a Quick Report

Quick Reports can be created with different presentations. The following sample reports use the same fields, but are present differently:

- **Simple:** A list of records and the selected fields

Release of Info
04/04/2018

Student	Pupil #	Alerts	DOB	YOG	Grade	GrSubLvl	EnrStatus	School > Name	Homeroom	PAC	Release of Info
Adedoyinbolaji, Liamjames	706925		05/06/2003	2021	09		Active	Claremont Secondary	2021-06	Yes	No
Critch, Pushwinder	706809		20/11/2001	2019	10		Withdrawn	Claremont Secondary	ZU02	No	Yes
Achenn, Kaivalya	304269		24/10/1998	2017	12	SU	Graduate	Claremont Secondary	2017-07	No	No
Linharesdeoliveira, Mihaisebastian	215916		28/11/1997	2018	12		Active	SD63 Continuing Ed	BRMD10		

- **Detail:** A page for each record with selected fields aligned vertically

Release of Info
04/04/2018

Student:	Adedoyinbolaji, Liamjames
Pupil #:	706925
Alerts:	
DOB:	05/06/2003
YOG:	2021
Grade:	09
GrSubLvl:	
EnrStatus:	Active
School > Name:	Claremont Secondary
Homeroom:	2021-06
PAC:	Yes
Release of Info:	No

Release of Info
04/04/2018

Student:	Critch, Pushwinder
Pupil #:	706809

- **Group:** A list of records and the selected report fields, grouped by a selected field (School Name in the sample)

Release of Info
04/04/2018

School > Name: Claremont Secondary

Student	Pupil #	Alerts	DOB	YOG	Grade	GrSubLvl	EnrStatus	School > Name	Homeroom	PAC	Release of Info
Adedoyinbolaji, Liamjames	706925		05/06/2003	2021	09		Active	Claremont Secondary	2021-06	Yes	No
Critch, Pushwinder	706809		20/11/2001	2019	10		Withdrawn	Claremont Secondary	ZU02	No	Yes
Achenn, Kaivalya	304269		24/10/1998	2017	12	SU	Graduate	Claremont Secondary	2017-07	No	No

School > Name: SD63 Continuing Ed

Student	Pupil #	Alerts	DOB	YOG	Grade	GrSubLvl	EnrStatus	School > Name	Homeroom	PAC	Release of Info
Linharesdeoliveira, Mihaisebastian	215916		28/11/1997	2018	12		Active	SD63 Continuing Ed	BRMD10		

- **Summary:** Cumulative values based on the records selected (School Name in the sample)

Release of Info
04/04/2018

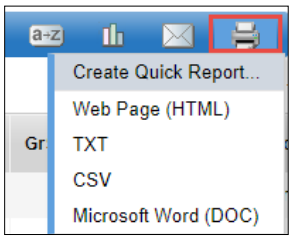
Summary School > Name: Claremont Secondary		
Totals	School > Name: Claremont Secondary	3

Summary School > Name: SD63 Continuing Ed		
Totals	School > Name: SD63 Continuing Ed	1

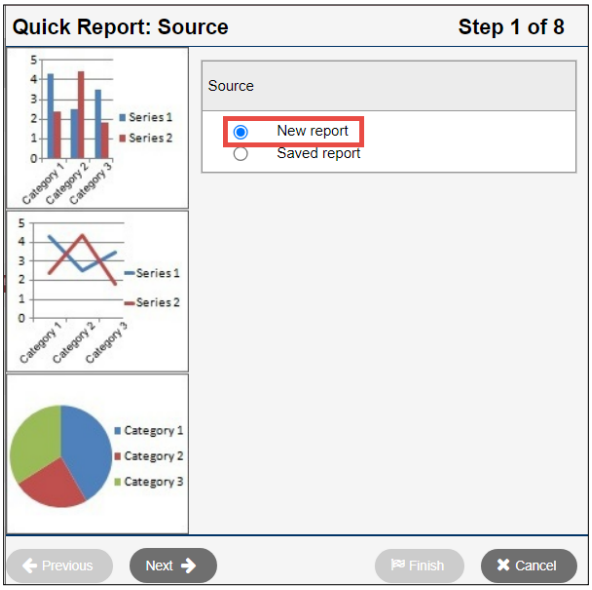
Report Summary		
Totals	Overall	4

In the example below, the simple Quick Report will provide a school with a report indicating which students have Release of Information indicators, and is created from the **Student** top tab.

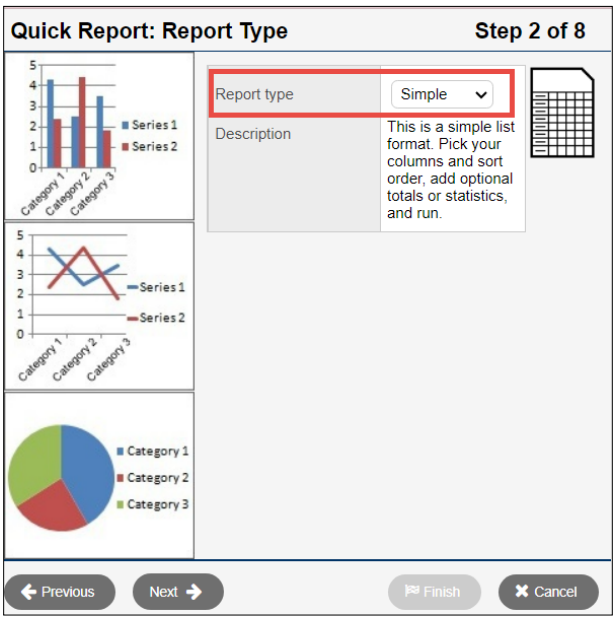
1. In the **School** view, click the **Student** top tab
2. Click the Quick Reports Icon and Select Create Quick Report or, Click the **Reports** menu item and select **Quick Report**



3. In Step 1 of the Wizard, select **New Report**. Click **Next.**

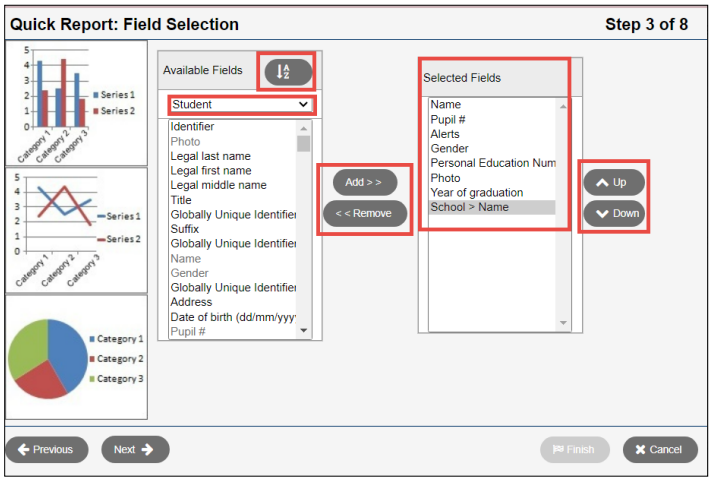


4. In Step 2 of the wizard, select **Simple.** Click **Next**.

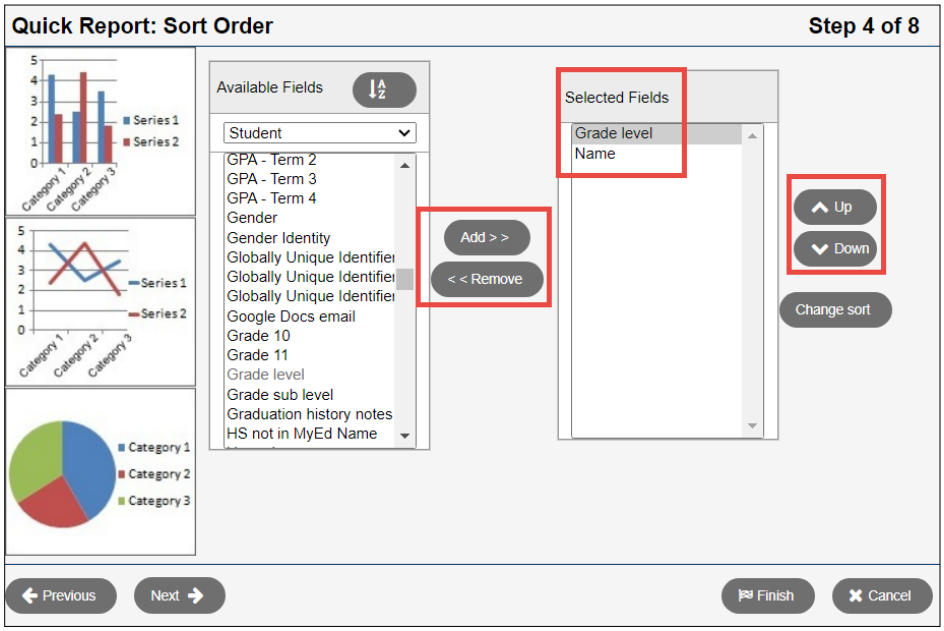


5. In Step 3 of the wizard, the current field set will display as the selected fields
6. Select the desired fields and click the **Add >>** button to move it to the *Selected Fields* box.
    a. The drop-down menu Under Available Fields can be changed from the Student table to a different table to combine data elements from other areas of the application.
    b. The Sort button will sort the available fields for the selected table in alphabetical order, making it easier to locate specific fields.

7. In the *Selected Fields* box, click on any fields not needed and click the **Remove** button.

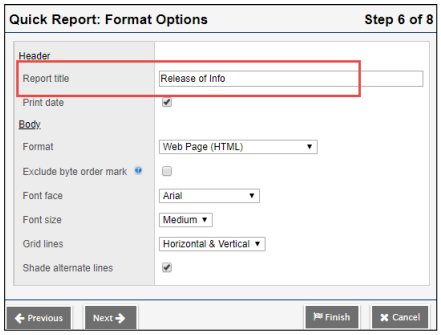


8. Click **Next**.
9. In step 4 of the wizard, select the field(s) to sort by in the *Available Fields* list and use the **Add** button to move them to the *Selected Fields* box. The primary sort will be the first field in the *Selected Fields* box; the secondary sort will be the second field, etc.

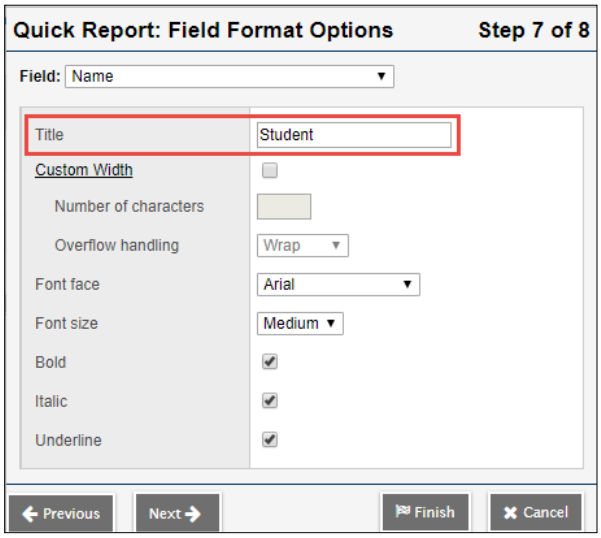


10. Click **Next**.
11. Step 5 of the wizard is optional. Use these functions to create counts, and page breaks if desired.
12. Click **Next**.

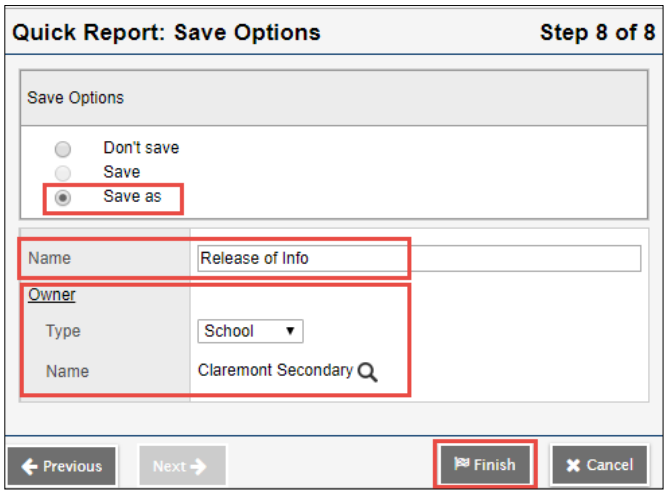
13. In Step 6 of the wizard:
    a. **Report Title:** Enter a title for this report.
    b. **Print date:** If selected, the date the report was generated will appear on the report.
    c. **Body > Format:** Select the format for the report.
    d. **Exclude byte order mark:** Can be checked if the report will be loaded to a system requiring limitations in text. Hover over the question mark symbol for details.
    e. **Body > Font Face:** Select the font for the report.
    f. **Body > Font Size:** Select the font size for the report.
    g. **Body > Grid lines:** Select whether the report should have grid lines for horizontal, vertical, or both, or none.
    h. **Shade alternate lines**: If selected, the data will appear with grey shading on alternate lines.



14. Click **Next**.
15. Step 7 of the wizard is optional. It allows the user to rename the fields that will appear on the report. To adjust the name of a field, select it from the **Field** drop-down. In the **Title** field, enter a name. Note that the field is only being re-named for the report – not for the application. *Font, Size, Bold, Italic* and *Underline* can be selected to tailor the field name in the report.



16. Click **Next**.
17. In Step 8 of the wizard, the report may be saved for future use. To save this quick report, click the **Save As** radio button.
    a. **Name:** Enter a name for the saved report.
    b. **Owner Type**: Select from the drop down list.
        i. **District**: Report will be available for District users
        ii. **School**: Report will be available for School users in the selected school
        iii. **User**: Report will be available for only the user creating the report
    c. **School**: Select the school (if applicable)



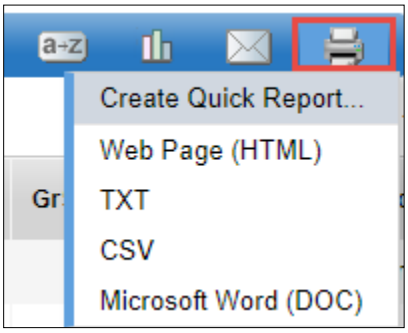
18. Click **Finish.**

10.2 Running a Saved Quick Report

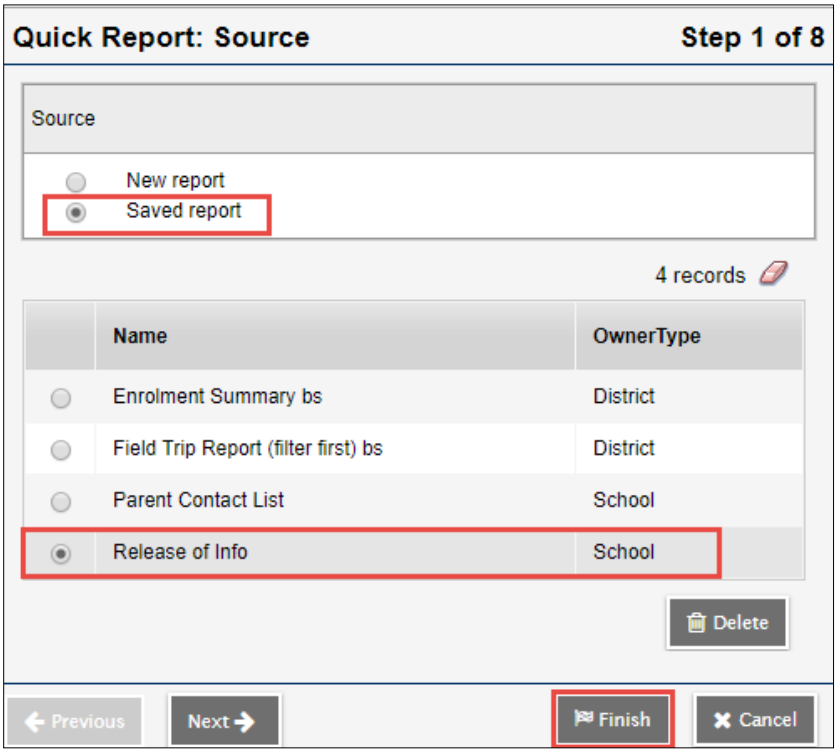
If a report was saved, it is now available in Quick Reports based on the Owner type selected.

Quick Reports provide an opportunity for a user to create a customized report that contains specific data elements. For the example below, this is done from the Student top tab, but quick reports can be created in different areas of the application with elements that are relevant to the chosen area of the application.

1. In the **School** view, click the **Student** top tab
2. Click the Quick Reports Icon (printer) and Select Create Quick Report OR Click the **Reports** menu and select **Quick Report**



3. In Step 1 of the Wizard, select **Saved report.**
4. The available saved reports will display, select the report.
5. Click **Finish** to run the report as is or click Next to make changes to the report an proceed through the steps of the wizard as outlined in *Creating a Quick Report.*



11.0 Email Functionality

11.1 Email

A Primary Email Address must be entered in User Preferences > Security tab for email functionality to work

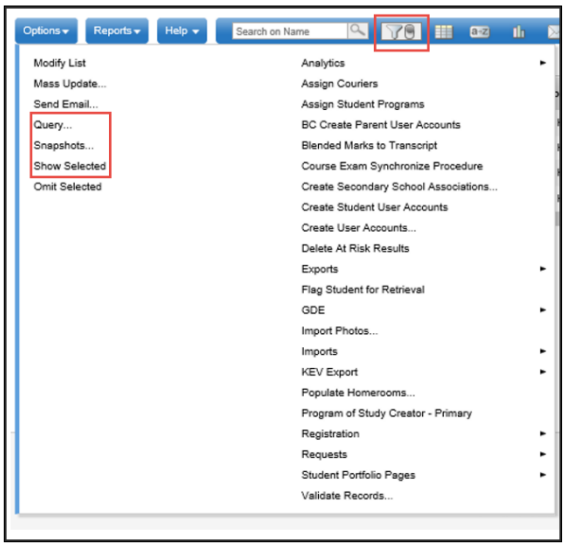
11.2 School View Send Email

Whenever you are on a person based list in MYEDBC, such as Student List or Staff List you can send:

- A mass email to everyone on the list
- An email to a selected group on the list
- An email to one person on the list

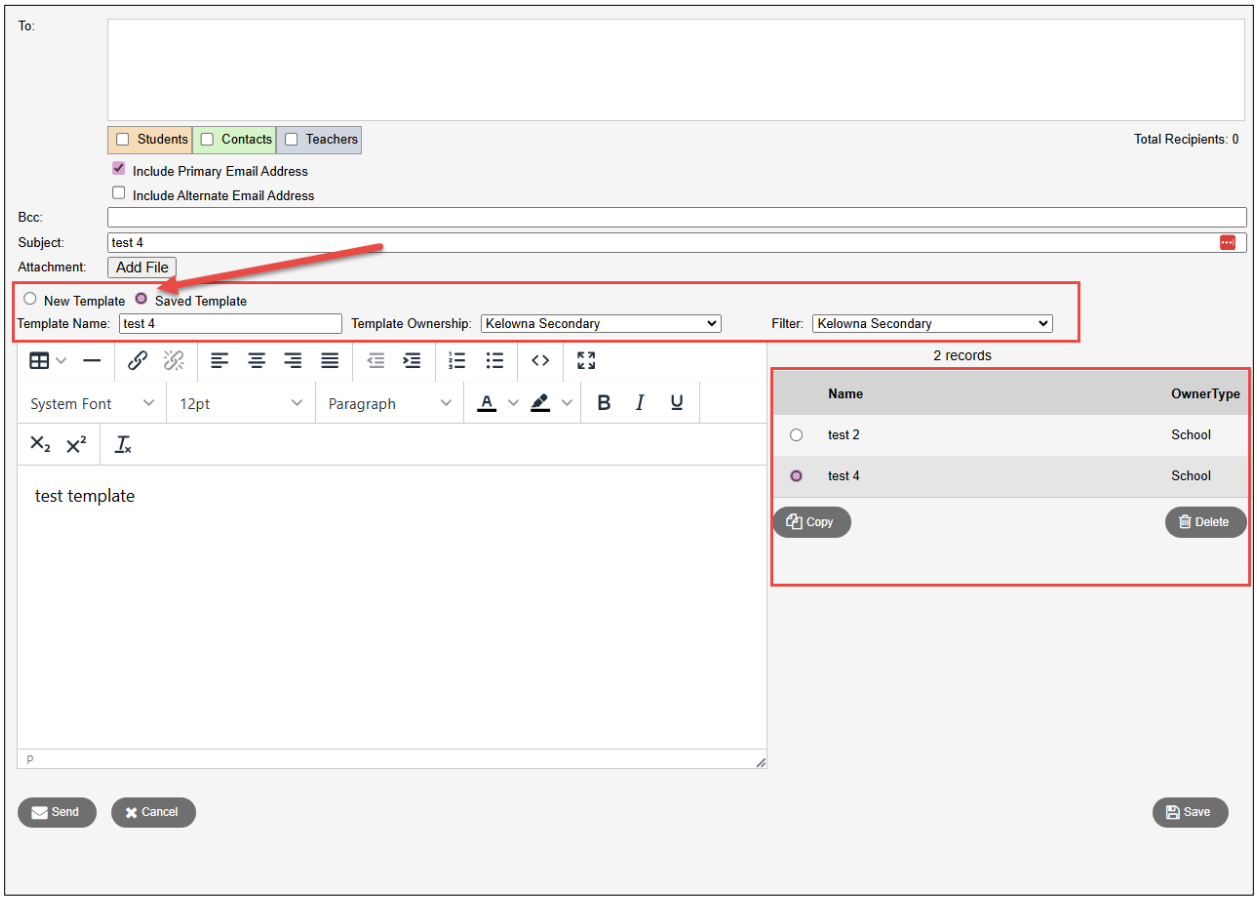
11.2.1 To send an email from a person based list.

1) Go to the list containing the records of the people you want. Note – you can narrow down this list of records by using Show selected, Omit Selected, a query, a filter, or a snapshot.



2) From the Options menu, click Send Email. The Mass Email pop-up appears:

Note: The email functionality in MyEducation displays a maximum of 150 email addresses, regardless of the number of recipients selected when sending emails. This is a performance safeguard, View the email log in School, District or Staff view for a complete list of recipients.



3) Use the following table to fill in the fields:

Field	Description
From	This address is the primary email address listed in your user preferences.
To	The names of the recipients who will receive the message appear. Note: Attempting to send while there are no addresses in the To field, will result in an error message. This can occur if you manually delete all addresses by clicking the x in the corner of each address,

	for example, or if you open the Mass Email pop-up after creating a query that returns no results. Note: Within a subset of email addresses, you can delete a particular address by clicking the x in the corner. The Total Recipients number updates accordingly.
Bcc	To use multiple email addresses use commas between each email address
Students Contacts Teachers	Use these checkboxes to select or deselect students, their contacts who opt to receive email (according to the student contacts details page), and their teachers as recipients of the email.
Include Primary Email Address	Select this checkbox if to send an email to the primary email address(es) of the recipient(s) included in the To field. Note: This checkbox might be selected by default, depending on your district's communication preferences.
Include Alternate Email Address	Select this checkbox to send the email to the alternate email address(es) of the recipient(s) listed in the To field. Note: This checkbox might be selected by default, depending on your district's communication preferences.
Subject	Type a subject for your email message. Limit of 200 characters
Attachment	If you want to attach a file to your message, click Choose File to navigate to the file you want to send. Emails sent from the MyEducation BC application have a **combined attachment size limit of 7.1MB** (total limit for all attachments in an email). If the total attachment size is larger than 7.1MB the email will not send successfully. There is also a **limit of 56 characters for the file name** of each attachment. If a file name exceeds 56 characters the email will send successfully, however an error message will appear: **The error message is related to how the application is trying to handle the attachment, not the actual process of sending out the message. The message will send successfully.**
New Template	Create an email template with a subject and name to save for future use

Saved Template	Choose from saved template(s) by selecting the radio button and choosing from the list of saved templates.
Template Name	Give the template a unique name
Template Ownership	Templates can be saved for use by the user, the school, or the district if the user has access.
Text Box	Type your message inside the text box. A rich text editor provides the following formatting options: • Font • Font size • Formatting, including bold and italics, bullets and numbering • Color • Hyperlinks and images Note: To insert an image, click in the URL field, copy and paste the URL of the image. Then click OK.

4) Click Send, a confirmation message displays. Confirm the details.
5) Click yes or No. If you click yes, a progress meter appears
   a) Note: There are only two direct recipients of the email message – the sender and the districts incoming email address. Everyone else on the list is the blind carbon copied (Bcc'd) If you would like a copy of the message, include your own email address in the Bcc: field.

11.3 School or District View Email Log

Use the email log to review a list of emails sent by MYEDBC users through Send Email on the Options menu. The log contains records for messages sent from the District, School, Staff, Health, Personnel, and Student Services views.

Users who need to see the Email Logs will need to have a security tag in their existing base role or added.

In Admin top tab > Security side tab, create a role or add the security tag to a created role with the following: School View > Core > Email Log > Read (checkbox). Please refer to security documentation on the L1 Information Station for assistance with security roles.

From the log, you can see the details of a particular email that was sent.

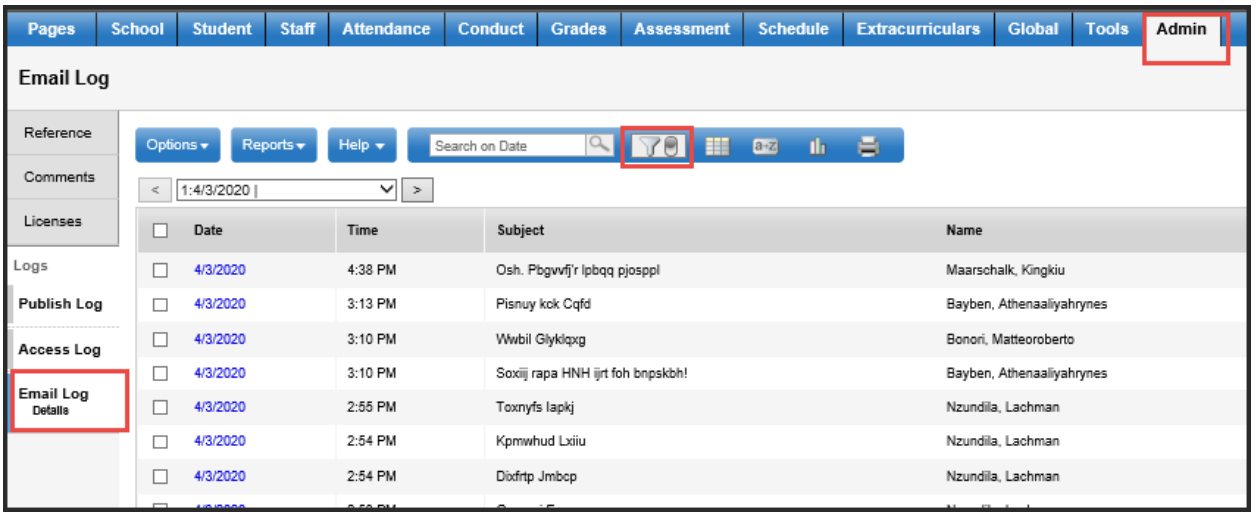
To view the email log:

1) Log on to the District, or School view.
2) Click the Admin tab, and then click the Logs side-tab.
3) Click Email Log.
4) Use the Filter menu to view records for the following:
   a) Today (default)
   b) This Week
   c) This Month
   d) All Records
5) For each record, the list displays the following:

To review an email's details:

1) Select the checkbox in the row of the email you want to review.
2) On the side-tab, under Email Log, click Details. The emails details page appears.

In addition to the information in the table above, the details page displays the email's message, and lists any attachments that were sent. It is not possible to open the attachment.



11.4 Mass communications via email

MyEducation BC has functionality to send out mass communications via email. When School and/or District send out mass communications to staff it is important to note the difference between sending email messages via the **Student Top Tab** versus **Staff top tab**.

The following functionality is the same in both School, Staff and District View.

Student Top Tab:

- Emails sent using the Student top tab **scope to the student**. When selecting teachers from here, the system will send an email to **ALL teachers of ALL students in the list, regardless of the School or District the applicable teacher resides.**

Student Top Tab > Contacts Side Tab:

- Emails sent from this screen will send to all contacts with a valid email address, it does not limit to only those with receive email selected.

Staff Top Tab:

- Emails sent using the Staff top tab **scope to the school or district** sending the email and will limit the recipient list to **staff members within in the School/District**.

Troubleshooting

- If a teacher reports receiving emails from an out-of-district source; look for students that have secondary associations for the schools/districts that sent the emails. Next, look at courses and homerooms associated to those students. These steps will help determine if the recipient is a teacher for any of those students.

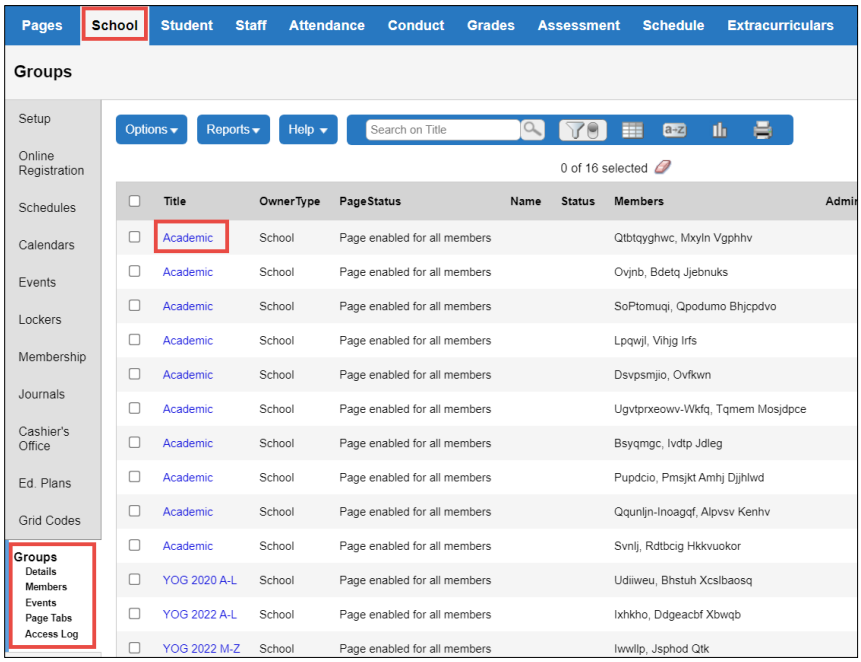
11.5 Send an Email to Group Members

Whether your group or Page is for the high school chorus, j.v. soccer team, or English department faculty, it is likely that at some point you will want to send members an email. You can send your message to all or just some of the group members.

To send an email to group/Page members:

- Log on to the District view. Click the District tab, then the Groups side-tab.
- Log on to the School view. Click the School tab, then the Groups side-tab.
- Log on to the Staff view. Click the My Info tab, then the Groups side-tab.

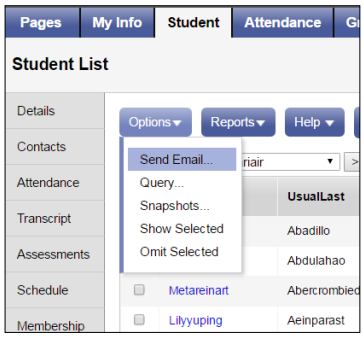
1) Select the checkbox of the group you want to work with.
2) On the Groups side-tab, click Members > People.
3) On the Options menu, click Send Email. The following pop-up appears:

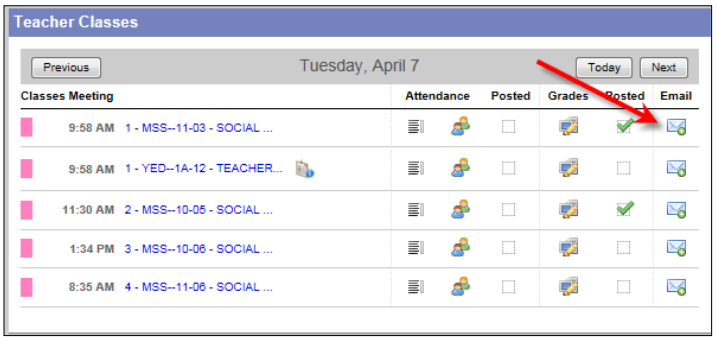


11.6 Staff View Send Email

A Primary Email Address must be entered in User Preferences > Security tab for teacher email functionality to work.

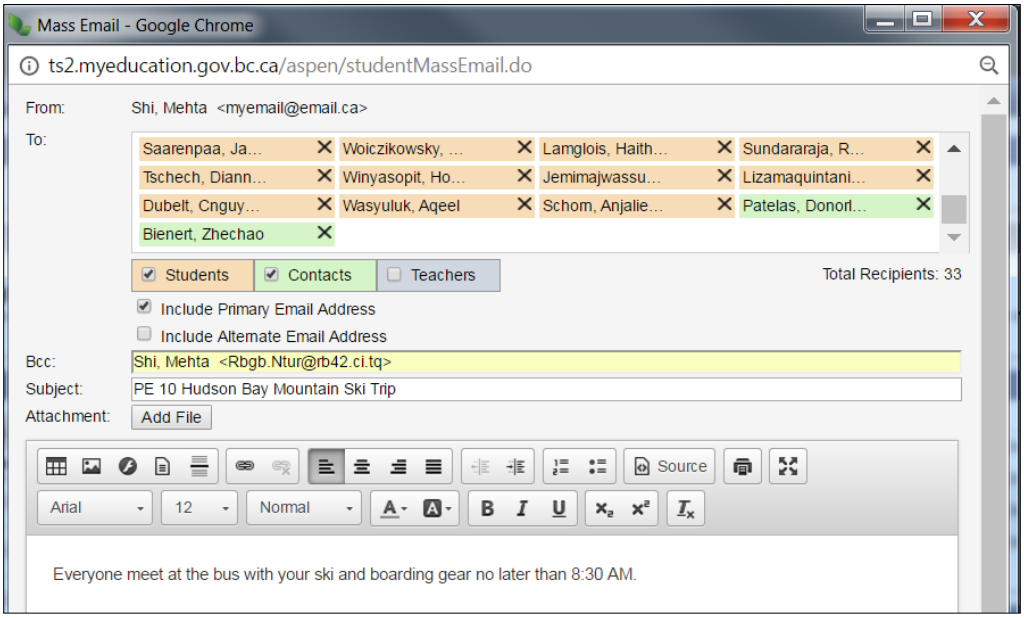
Send Email can be found in the **Options** menu under the **Student** top tab or from a class roster. The former will default to send to all of the teacher's students, the latter only to the roster of a selected class. A quick access icon to email a class is also found on the Teacher Classes widget at the far right of the class.





Provided there is a *Student email* address in the student's basic demographic details, they will be selected for email. Teachers can also include parent/guardian contacts for their students. Contacts must have a *Primary email* and *Receive email* checked on their details.
When using email in MyEd all recipients are Bcc'd.

Recipients are colour coded according to students, contacts or teachers. Note the option to Include Alternate Email Address as well as the primary. Sending emails to all teachers will include teachers from other Schools or Districts that also teach the student(s).



11.6.1 Staff View Email Log

Use the email log to review a list of emails sent by MYEDBC Staff View users through Send Email on the Options menu.

From the log, you can see the details of a particular email that was sent.

To view the email log:

1) Log on to the Staff view. Staff View>My Info Top Tab>Email Log Side Tab
2) Click the My Info Top Tab, and then click the Email Log side-tab.
3) Use the Filter menu to view records for the following:
   a) Today (default)
   b) This Week
   c) This Month
   d) All Records

To review an email's details:

1) Select the checkbox in the row of the email you want to review.
2) On the side-tab, under Email Log, click Details. The email's details page appears.

In addition to the information in the table above, the details page displays the email's message, and lists any attachments that were sent. It is not possible to open the attachment.

11.7 BC Student Email Import

The BC Student Email Import will help district users to mass load both student primary and alternate email addresses.
Please refer to documentation BC Student Email Import located on the L! Information Station
Records in the import file are validated based on following criteria:

- District ID in the file matches the District ID on the parameter screen
- District ID matches the District ID in MyEducation BC
- Pupil number is active and primary to the District ID on the parameter screen
- Primary email contains both an @ symbol and a (.)
- Alternate email address contains both an @ symbol and a (.)

Notes: Students can change the Primary email address in the user preferences. Student alternate email addresses can be added to a field set for viewing in School and Staff view

12.0 Enhanced Characters

Some tables and fields will support Unicode characters. Users will be able to enter, store, and print progress comments with BC Sans Font which includes many indigenous language characters and other special characters in the fields.

Some fields connect to ministry and downstream legacy systems that cannot support Unicode characters. Some validations are on those fields, so they remain unaffected by the rollout of Unicode characters and Users will not be able to enter, store, and print progress comments with Indigenous language text and other special characters in the fields.

Student records cannot accept any Enhanced Characters in any of their name fields.

Staff Records cannot accept any Enhanced Characters in there Usual First and Last Name fields.

Contact records can accept Enhanced Characters in both Legal and Usual Name fields.

Not all fields support enhanced characters yet. You can enter them, and you will see them in the front end of the application until your cache is refreshed, at which time those characters will revert to question marks. (???). We are working with Follett to get all fields supported, but it is a long term, process. If the user gets question marks they need to remove those characters for the time being.

The fields that have validations (cannot use Unicode characters) are as follows:

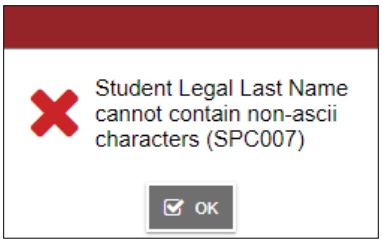
Table	Field	GDE Appearances
Address	City	Student Demographic Student Demographic—Enhanced
Address	City Prov PC	N/A
Address	Country	Student Demographic Student Demographic—Enhanced
Address	RR Number/PO Box	Parent Information
Address	State/province	N/A
Address	Street address	Student Demographic Student Demographic—Enhanced
Address	Street name	Parent Information Student Demographic Student Demographic—Enhanced
Address	Street type	N/A
Person	Gender	Student Demographic Student Demographic—Enhanced Student Next Year New GDE

Table	Field	GDE Appearances
Person	Legal first name	Accident Information Admission/Withdraw Information Course Marks Cross Enrolled School Information Curriculum Marks Information Curriculum Marks History Emergency Contact Information Emergency Contact Information—Enhanced ESL Number of Year Homeroom and Staff Assignments Incident Information Medical Information Parent Information School Team Sibling Information Standardized Tests Student Course History Student Course Request Student Course Selection Student Daily Absences Student Demographic Student Demographic—Enhanced Student Next Year New GDE Student Period Absences Student Period Absences—Enhanced Student Programs Student Schedule Drops Transportation Information User Account Information
Person	Legal last name	Accident Information Admission/Withdraw Information Course Marks Cross Enrolled School Information Curriculum Marks Information Curriculum Marks History Emergency Contact Information Emergency Contact Information—Enhanced ESL Number of Year Homeroom and Staff Assignments Incident Information Medical Information Parent Information School Team Sibling Information Standardized Tests

Table	Field	GDE Appearances
		Student Course History Student Course Request Student Course Selection Student Daily Absences Student Demographic Student Demographic—Enhanced Student Next Year New GDE Student Period Absences Student Period Absences—Enhanced Student Programs Student Schedule Drops Transportation Information
Person	Legal middle name	Student Demographic Student Demographic—Enhanced Student Next Year New GDE
Person	Usual first name	Published Reports Export School Messenger Address Book Sibling Information Student Demographic Student Demographic—Enhanced
Person	Usual last name	Published Reports Export School Messenger Address Book Sibling Information Student Demographic Student Demographic—Enhanced
Person	Usual middle name	Published Reports Export School Messenger Address Book Sibling Information Student Demographic Student Demographic—Enhanced
Person	Preferred Second Name	Published Reports Export School Messenger Address Book Sibling Information Student Demographic Student Demographic—Enhanced
School	Name	Build View Workspace Course Marks Cross Enrolled Student Information Curriculum Marks Information Curriculum Marks History Published Reports Export School Details School Team Student Course History

Table	Field	GDE Appearances
		Student Course Request Student Demographic Student Demographic—Enhanced Student Next Year New GDE Student Programs User Account Information
School	School Email	N/A
School Course	Description	Build View Workspace Course Information Course Information—Enhanced Student Course Request Teacher Course
Staff	Name	Admission/Withdraw Information Build View Workspace Course Marks Cross Enrolled School Information Curriculum Marks Information Emergency Contact Information Emergency Contact Information—Enhanced ESL Number of Years Homeroom and Staff Assignments Incident Information Medical Information School Team Sibling Information Staff Information Staff Information—Enhanced User Security Information

If you enter a character that is not supported in any of the fields above, you will receive an error message saying "***Field Name*** cannot contain non-ascii characters"



12.1 Reports and Extracts

The following reports and extracts will display enhanced characters where available

- Learning Update
- Competency Based IEP Report
- Individual Education Plan Report
- Competency Summary Report
- Annual Instructional Plan Report
- Interim IB MYP Report Card
- International Baccalaureate Report Card
- International Baccalaureate – New Report Card