

# WORK PROCESS FOR PRODUCING A CSV FILE WITH CUSTOM FIELD SET, FILTER AND SORT

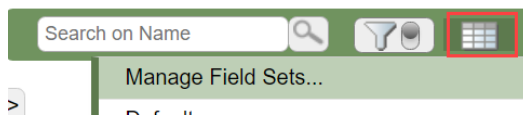
It could be useful to anyone who wants to make their own custom report on anything.

## IN SCHOOL VIEW > STUDENT TT

(All icons referred to below are to the right of the search box)

### CREATE A NEW FIELD SET

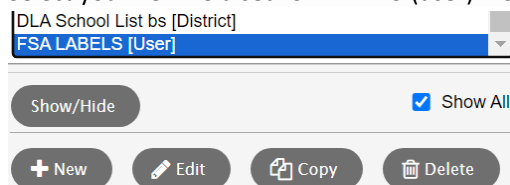
- Field Sets icon > Manage Field sets



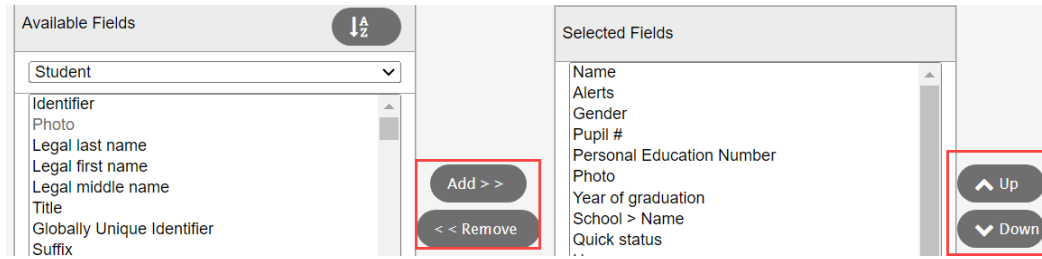
- Select Student Info (Enterprise) > Click Copy (You have to do this because you can't edit an enterprise Field Set)
- Name your new field set i.e. FSA Labels
- Save

### EDIT YOUR NEW FIELD SET

- Select your new field set FSA LABELS-(user) > Click Edit



- "Define Field Set Window"
  - Left side = Available fields (already used fields are light grey)
  - Right side = Selected fields
- Click on fields on each side and use Add or Remove until Selected Fields includes all the required fields ie.
  - legal last name
  - legal first name
  - personal education number
  - homeroom
  - homeroom teacher



- Click on field names under Selected and use Up and Down to order your fields from right to left
- Click Save
- Click Close to leave pop up window

### CHOOSE YOUR NEW FIELD SET

- Click on the Field Set Icon and choose your new Field Set

### CHANGE YOUR FILTER

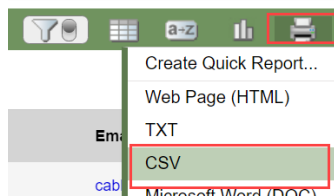
- Click Filters icon
- Choose Grade =? > Select Grade level > Click Submit

### SORT YOUR STUDENTS

- Click on the Homeroom column header to Sort by homerooms

### CREATE YOUR REPORT

- Click the Quick Print Menu icon > Select csv



- The file may open automatically in MS Excel. If it doesn't, then the file will be in your downloads folder.
- Open the CSV file in MS Excel to view the data