
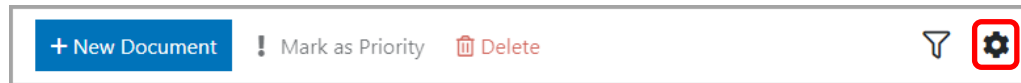




Dashboard & Column Preferences

The **Dashboard Preferences** window on the **Dashboard** screen and the **Column Preferences** window on the **Student Documents** screen **Documents** tab let you set preferences that determine the type of information that displays for your documents. To set your preferences on either of these screens, click .



The preferences window opens.

Toggle any preference to display or hide columns for:

- Document **Priority**
- Birthdate (**DOB**)
- **Grade** level
- **Case Manager**
- **Event Date** (Student Documents screen **Document** tab only)
- **Include in EMIS** (Student Documents screen **Document** tab only)
- Document **Type**
- Document **Status**
- Document **Due Date**
- Document **Progress**

Column Preferences ×

Priority <input checked="" type="checkbox"/>	Type <input checked="" type="checkbox"/>
DOB <input type="checkbox"/>	Include in EMIS <input checked="" type="checkbox"/>
Grade <input checked="" type="checkbox"/>	Status <input type="checkbox"/>
Case Manager <input type="checkbox"/>	Due Date <input checked="" type="checkbox"/>
Event Date <input type="checkbox"/>	Progress <input checked="" type="checkbox"/>
Sort Order <input type="button" value="Use Current Sorting"/>	Filters <input type="button" value="Use Current Filters"/>


Note: Click **Use Current Sorting** or **Use Current Filters** to save your current sort order or your current filters, respectively, for future sessions.

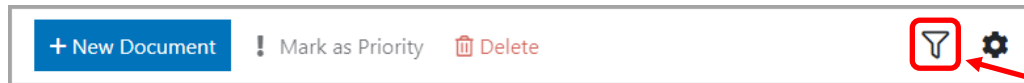
Note: To sort the documents by any column, click the column heading.

		Student	DOB	Grade	Case Manager	Document	Type	Status	Due Date	Progress
<input type="checkbox"/>		EMMONS	10/02/05	05			STP	0	07/10/2016	

**see reverse side for more information*

Document Filters

You can use filter criteria to narrow the list of documents that displays on the **Dashboard** screen or the **Student Documents** screen **Documents** tab. To use the filters on either of these screens, click .

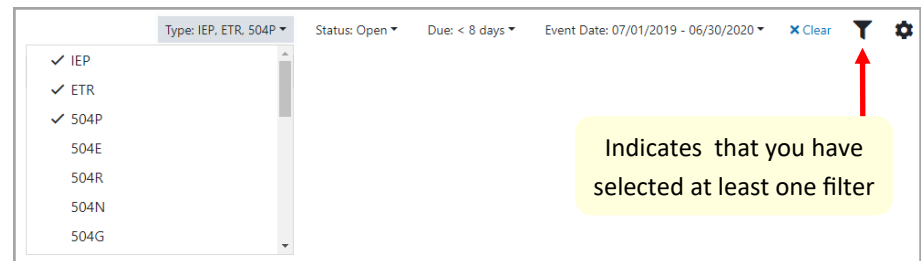


Indicates that you have not selected any filters

All available filters display.

Select any combination of the following filter criteria to view documents that match only those criteria:

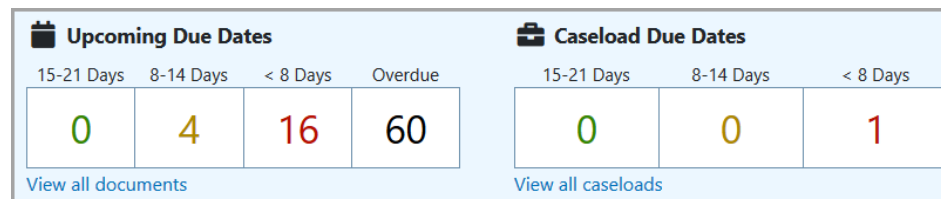
- **Student Name** – (Student Documents screen Documents tab only)
Enter 2 or more letters of a student’s first or last name.
- **Type** – Select one or more document types from the drop-down list.
- **Status** – Select one or more document statuses from the drop-down list (**Open**, **In Review**, **Completed**, **Archived** [Student Documents screen Documents tab only], and/or **Include EMIS** [Student Documents screen Documents tab only]).
- **Due** – Select a due date range from the drop-down list.
- **Event Date** – (Student Documents screen Documents tab only) Enter or select an event date range from the drop-down list.



Indicates that you have selected at least one filter

Note: To clear all selected criteria in a particular drop-down list, scroll to the bottom of the list and click **✕ Clear**. To clear all selected criteria in all drop-down lists, click **✕ Clear**.

You can also filter your documents using the **Upcoming Due Dates** and **Caseload Due Dates** areas at the top of the **Dashboard** screen. Click any of the boxes to filter by that box’s category. To view all documents to which you have access, click **View all documents**.



Note: The **Caseload Due Dates** area displays upcoming due dates by caseload and is used only by administrative users with access to multiple caseloads. For more information, see the ProgressBook SpecialServices Administrator Guide.