

Appendix II: Time Saving Hints



II.A Viewing Multiple Records

II.B Sorting Records

II.C Filtering Records



II.D Creating Favorites for Inventory Records

II.E Creating Favorites for Reports




Viewing Multiple Records


The following illustrates a quick method to edit multiple Records of the same kind, such as Site Records, without having to switch back and forth between the List View and the Detail View each time you want to edit another Record.

This method is particularly helpful when you need to:

- Address new reporting requirements for existing inventory, such as site block/lot information.
- Copy and Paste multiple Inventory Items and then edit them. *(Use of the Copy and Paste feature is recommended for addressing new reporting requirements such as grossing factor spaces, parking lots, playgrounds, and playfields.)*

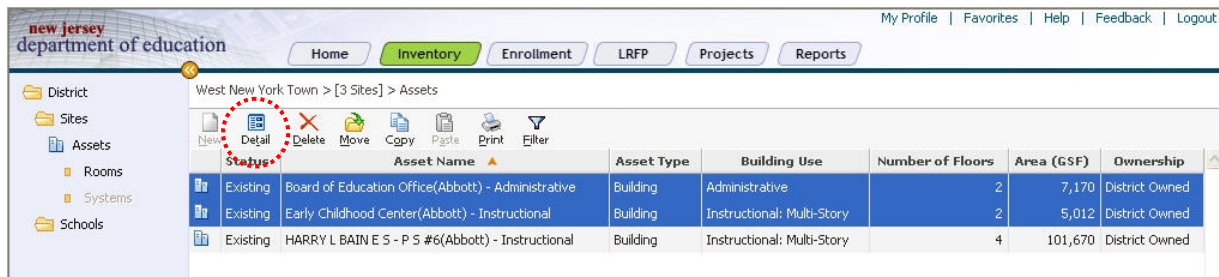
STEP 1 - In the List View, select the records that you would like to view or edit. Highlight the first record, and then hold down the **Shift** Key to select contiguous records or hold down the **Control** Key to select non-contiguous records.

STEP 2 - After you have selected the records that you want to view, “click” on the Detail Icon .

STEP 3 - After you “click” on the Detail Icon, you will see the Detail View of that first record that you selected. Review and edit the record as needed. When you are finished, “click” on the arrow in the Record Counter  in the top right-hand corner of the screen. The Record Counter allows you to move forward or backward through the Detail View of each selected record.

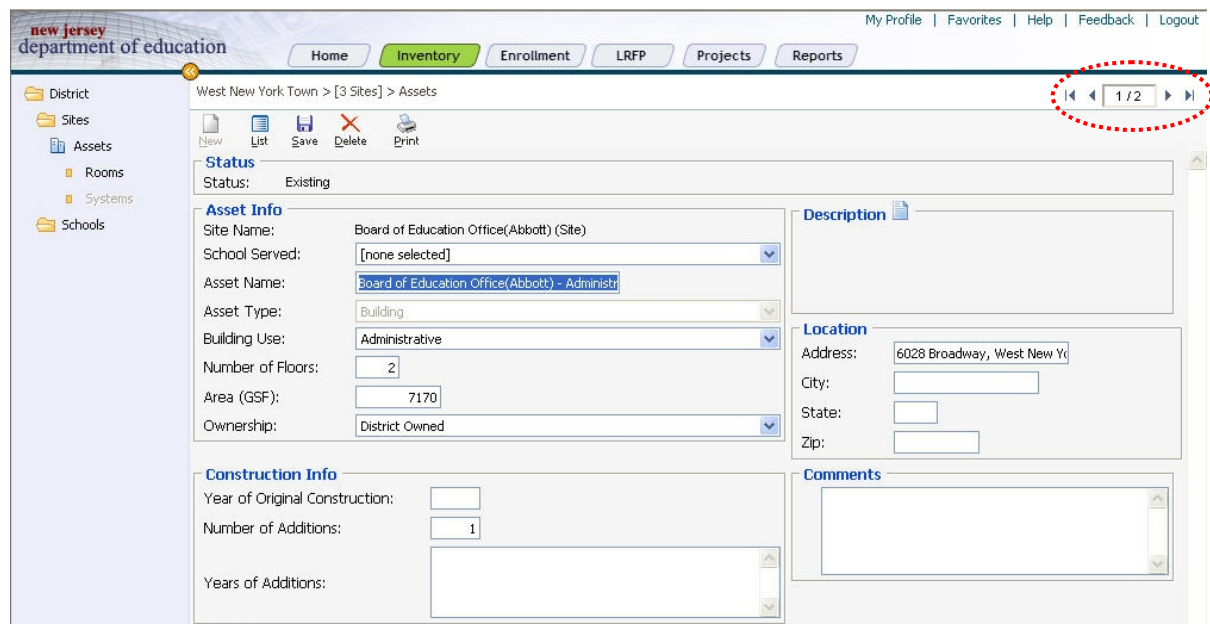
Note: An Asset List is shown, but you can select multiple records in any List View.

Assets – List View



Status	Asset Name	Asset Type	Building Use	Number of Floors	Area (GSF)	Ownership
Existing	Board of Education Office(Abbott) - Administrative	Building	Administrative	2	7,170	District Owned
Existing	Early Childhood Center(Abbott) - Instructional	Building	Instructional: Multi-Story	2	5,012	District Owned
Existing	HARRY L BAIN E 5 - P 5 #6(Abbott) - Instructional	Building	Instructional: Multi-Story	4	101,670	District Owned

Assets – Detail View



Status
Status: Existing

Asset Info
 Site Name: Board of Education Office(Abbott) (Site)
 School Served: [none selected]
 Asset Name: Board of Education Office(Abbott) - Admini
 Asset Type: Building
 Building Use: Administrative
 Number of Floors: 2
 Area (GSF): 7170
 Ownership: District Owned

Location
 Address: 6028 Broadway, West New Yc
 City:
 State:
 Zip:

Construction Info
 Year of Original Construction:
 Number of Additions: 1
 Years of Additions:

Comments

Sorting Records

The **Sort** feature can help you quickly find and select records in the **List View**. This feature is particularly helpful if you have a long list of records from which to choose, such as Room Records.

Ascending and Descending Sorts: In the List View, records can be sorted alphabetically and numerically, in ascending or descending order, by “clicking” on any of the column headers. Each List View defaults to sorting records by the first column in ascending order. The first time you “click” on a column header, the records will sort in ascending order. The second time you “click” on the same column header, the records will sort in descending order. When a list is sorted, a triangle appears next to the column heading indicating the direction (*ascending or descending*) that the column has been sorted.

Multiple Sorts: Once a Primary Sort has been selected, the records can be sorted by one or more of the remaining column headers. The records in the pictures to the right have been sorted first by Status in descending order, and then by Area in ascending order.

Note: A Room List is shown, but you can select sort records in any List View.

Room – List View / Primary Sort Ascending

Status	Room Name	Room Type	District Class Size Practice	Area (NSF)	Quantity
Existing	Principal's Office	Admin./Student Serv.		150	1
Existing	Rm. 101 Pre-Kindergarten Classroom	Pre-Kindergarten	15	950	1
Existing	Rm. 130 Pre-Kindergarten Classroom	Pre-Kindergarten	15	900	1
Existing	Corridors/Student Play Commons	Lobby/Vestibule/Corridor		4,000	1
Existing	Rm. 125 Resource Room	Small Group Instruction		375	1
Existing	Rm. 120A Speech Room	Small Group Instruction		225	1

Room – List View / Descending Order

Status	Room Name	Room Type	District Class Size Practice	Area (NSF)	Quantity
Potential	Corridors/Student Commons	Lobby/Vestibule/Corridor		1,700	1
Potential	Corridor to Addition	Lobby/Vestibule/Corridor		225	1
Potential	Pre-Kindergarten Classroom	Pre-Kindergarten	15	900	4
Potential	Custodial Closets	Custodial Support		50	2
Potential	Mechanical/Electrical Closets	Building System		300	1
Potential	Staff Toilets	Toilet		60	2


Room – List View / Multiple Sorts

Status	Room Name	Room Type	District Class Size Practice	Area (NSF)	Quantity
Potential	Custodial Closets	Custodial Support		50	2
Potential	Staff Toilets	Toilet		60	2
Potential	General Storage	Storage		200	1
Potential	Corridor to Addition	Lobby/Vestibule/Corridor		225	1
Potential	Mechanical/Electrical Closets	Building System		300	1
Potential	Warming Kitchen	Food Services/Large Group		300	1

Filtering Records

If you have a long list of records, you can “filter” the records to only view those that you are interesting in reviewing.

Filters take sorting one more step. Sorting allows you to order the records by the column headers, whereas Filtering allows you not only to order the records but also exclude from view any records that do not match the criteria of the filter. This feature will be particularly useful when editing rooms.

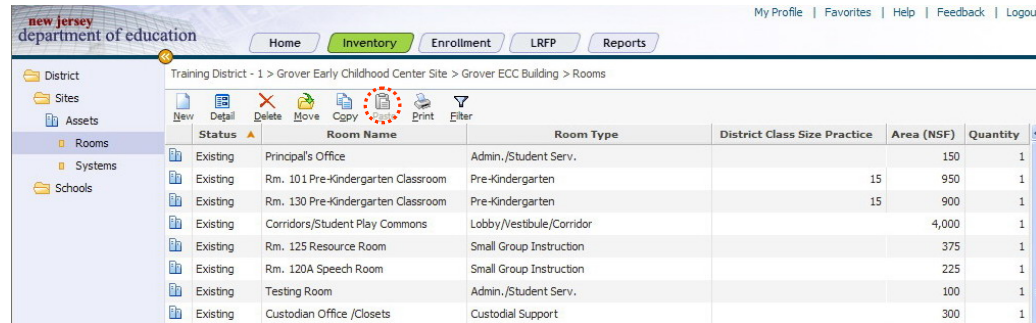
STEP 1 – While in the List View, “click” on the Filter Icon . The Select Filter Criteria Dialog Box appears.

STEP 2 – In the Select Filter Criteria Dialog Box, set the Field, Operator, and Value. You can filter by multiple fields. Choose “And” if you want the record to match all the selected criteria. Choose “Or” if the record only needs to match one of the selected criteria.

STEP 3 – After you have selected the Fields you want to include, “click” on the OK Icon.

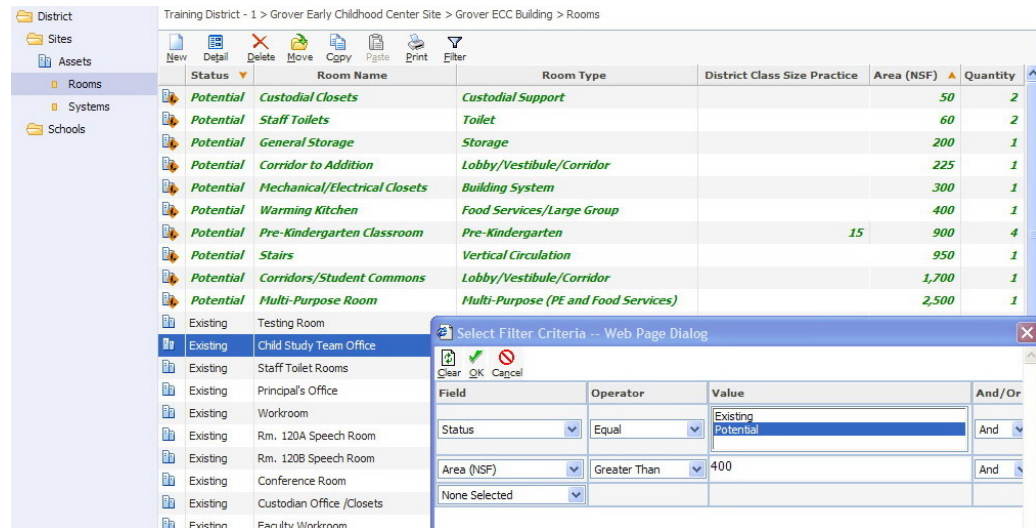
In the example to the right, we wanted to filter the Room List to only view Potential Rooms that are sized greater than 900 square feet. The criteria selection for the filtering were (1) a Status of Potential and (2) an Area greater than 900 square feet. *(Note: A Filter is not limited to only two criteria.)*

Room – List View



Status	Room Name	Room Type	District Class Size Practice	Area (NSF)	Quantity
Existing	Principal's Office	Admin./Student Serv.		150	1
Existing	Rm. 101 Pre-Kindergarten Classroom	Pre-Kindergarten	15	950	1
Existing	Rm. 130 Pre-Kindergarten Classroom	Pre-Kindergarten	15	900	1
Existing	Corridors/Student Play Commons	Lobby/Vestibule/Corridor		4,000	1
Existing	Rm. 125 Resource Room	Small Group Instruction		375	1
Existing	Rm. 120A Speech Room	Small Group Instruction		225	1
Existing	Testing Room	Admin./Student Serv.		100	1
Existing	Custodian Office /Closets	Custodial Support		300	1

Room – List View (Showing Filter Criteria Selection)



Status	Room Name	Room Type	District Class Size Practice	Area (NSF)	Quantity
Potential	Custodial Closets	Custodial Support		50	2
Potential	Staff Toilets	Toilet		60	2
Potential	General Storage	Storage		200	1
Potential	Corridor to Addition	Lobby/Vestibule/Corridor		225	1
Potential	Mechanical/Electrical Closets	Building System		300	1
Potential	Warming Kitchen	Food Services/Large Group		400	1
Potential	Pre-Kindergarten Classroom	Pre-Kindergarten	15	900	4
Potential	Stairs	Vertical Circulation		950	1
Potential	Corridors/Student Commons	Lobby/Vestibule/Corridor		1,700	1
Potential	Multi-Purpose Room	Multi-Purpose (PE and Food Services)		2,500	1
Existing	Testing Room				
Existing	Child Study Team Office				
Existing	Staff Toilet Rooms				
Existing	Principal's Office				
Existing	Workroom				
Existing	Rm. 120A Speech Room				
Existing	Rm. 120B Speech Room				
Existing	Conference Room				
Existing	Custodian Office /Closets				
Existing	Faculty Workroom				

Select Filter Criteria -- Web Page Dialog

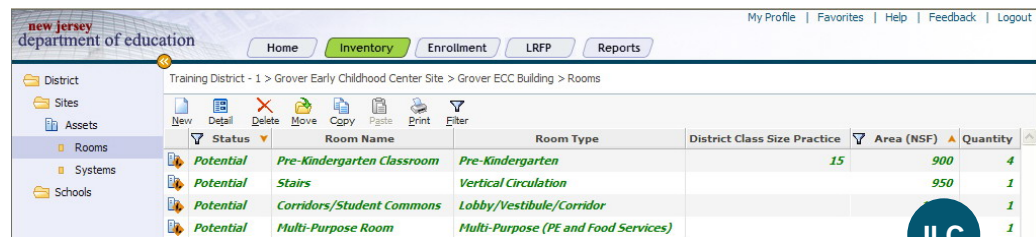
Field Operator Value And/Or

Status Equal Existing Potential

Area (NSF) Greater Than 400

None Selected

Room – List View (Results of Filter)



Status	Room Name	Room Type	District Class Size Practice	Area (NSF)	Quantity
Potential	Pre-Kindergarten Classroom	Pre-Kindergarten	15	900	4
Potential	Stairs	Vertical Circulation		950	1
Potential	Corridors/Student Commons	Lobby/Vestibule/Corridor			1
Potential	Multi-Purpose Room	Multi-Purpose (PE and Food Services)			1

Note: A Room List is shown, but you can filter records in any List View.

Creating Favorites for Inventory Records

A Favorite is a saved context. Favorites are especially helpful if you need to return to a context, or area of the website, on multiple occasions. For example, you can save a particular Inventory Record List View as a Favorite. Favorites can also be used to save Report Selection Criteria.

STEP 1 - In the example to the right, we are using the results of the Filter we ran on the previous page. Once the desired context has been determined, “click” on Favorite in the top right hand corner of the screen. “Click” on Add Favorite and a Save Favorite Dialog box will appear.

STEP 2 - Enter a Name and “click” on OK to save the Favorite.

STEP 3 - Once a Favorite is saved, it can be accessed from either the Home Page or from the Favorites pull-down menu, which can be accessed from anywhere on the website.

Room – List View (From Filter on Previous Page)

Status	Room Name	Room Type	District Class Size Practice	Area (NSF)	Quantity
Potential	Pre-Kindergarten Classroom	Pre-Kindergarten	15	900	4
Potential	Stairs	Vertical Circulation		950	1
Potential	Corridors/Student Commons	Lobby/Vestibule/Corridor		1,700	1
Potential	Multi-Purpose Room	Multi-Purpose (PE and Food Services)		2,500	1

Save Favorite Dialog Box

Save FACILITY -- Web Page Dialog

Enter Name:
Grover Potential Rooms >/= 900 SF

Or Save As:
[none selected]

OK Cancel

Accessing a Saved Favorite

LRFP

County	District	LRFP	Status
Training County	Training District - 1	Proposed LRFP	Work In Progress

1 of 1

Favorites

- Assets
- Grover Potential Rooms >/= 900 SF

Links

- NJDOE
- NJSCC
- VFA

Creating Favorites for Reports

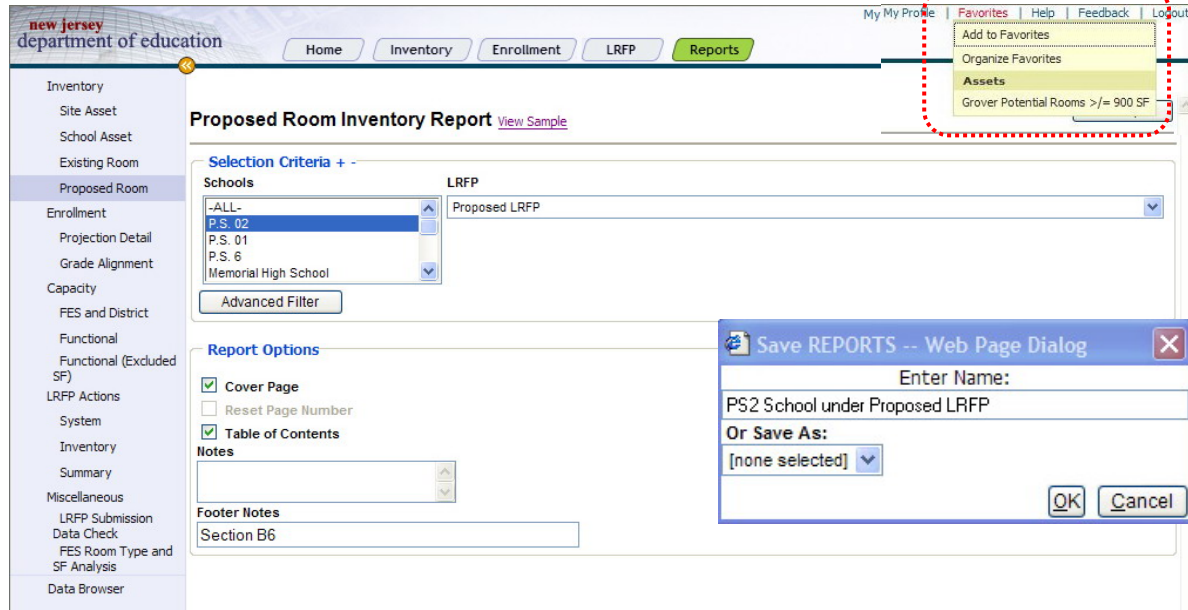
Report – Selection Screen

You can add a Report to your Favorites. Favorites are especially helpful if you need to return to a report on multiple occasions. In the example below, we are creating a Favorite for the Proposed Room Inventory Report for P.S. 2.

STEP 1 - After you have selected the desired Selection Criteria and Report Options, “click” on Favorite in the top right corner of the screen. “Click” on Add Favorite and a Save Favorite Dialog box will appear.

STEP 2 - Enter a Name and “click” on OK to save the Favorite.

STEP 3 - Once a Favorite is saved, it can be accessed from either the Home Page or from the Favorite pull down, which can be accessed from anywhere on the website at the top right-hand corner of the screen.



Accessing a Saved Favorite

