Pearson Inform 5.1

User Guide

Organizing Your Report Library

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Table of Contents

1 Report Library Overview

The Report Library is an area in Inform 5.1 that holds saved reports and dashboards for easy reuse.

1.1 Reviewing the Report Library Layout

This section will review the standard layout of the *Report Library*.
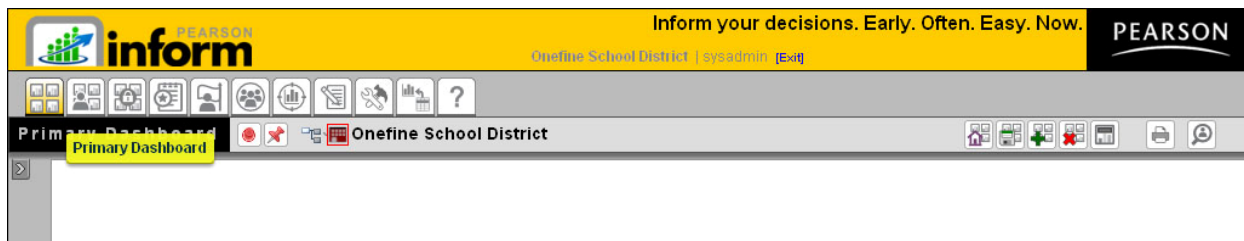
- **Click** the [ ] *Primary Dashboard* icon.

Figure 1-1

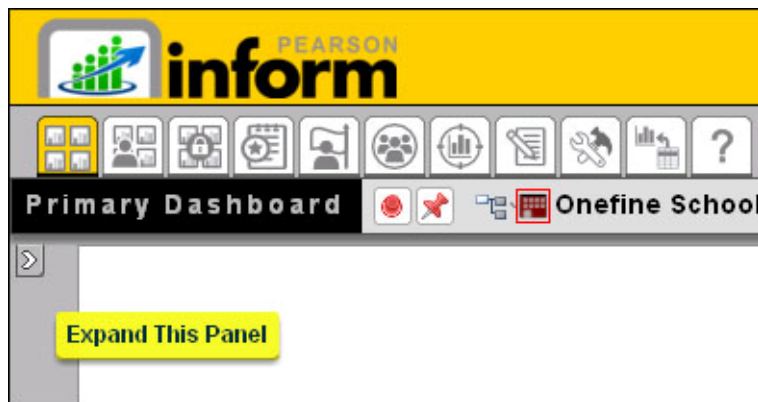- **Expand** [ ] the *Report Library* panel.
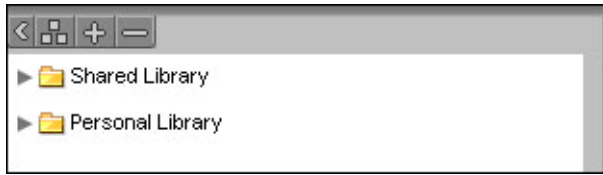

Figure 1-2

- A toolbar and two folders will display:

Figure 1-3

 Collapse This Panel

 Organize Report Library

 Expand Report Library

 Collapse Report Library

 Shared Library

 Personal Library

o *Shared Library*

> o The *Shared Library* can contain selections of folders, dashboards, and reports saved and shared by users.
>
> o **Click** on the dropdown arrow to view the list of Shared Library reports. An example of this is shown in *Figure 1-4*. Since this is a customizable area, your Shared Library may contain different information, but will be organized in the same fashion.
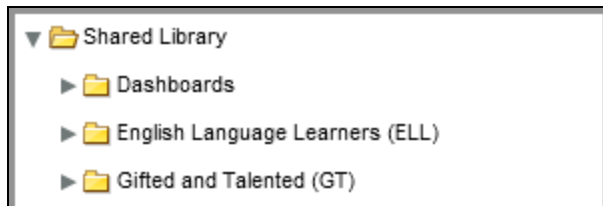

Figure 1-4

o *Personal Library*

> o The *Personal Library* contains selections of folders, dashboards, and reports created by the user that is logged in. The items stored in the Personal Library cannot be viewed by other Pearson Inform users.
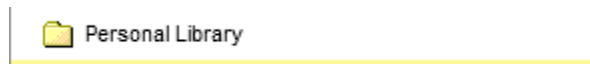

Figure 1-5

2 Organizing Folders in the Report Library

When organizing the folders in the Report Library, you will need to enter into edit mode. **Click** on the ⊞ *Organize Report Library* icon to do so. The Report Library area will then turn yellow, to indicate you are in edit mode.

2.1   Adding a Folder

To add a folder:

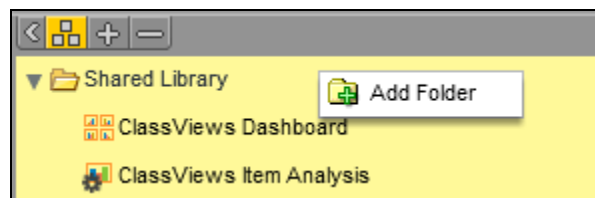- **Click** anywhere inside the panel.
- The ⊕ *Add Folder* option displays.

Figure 2-1

- **Click** ⊕ *Add Folder.*
- The *Add Folder* pop-up window displays.

Figure 2-2

- **Click** in the *Folder Name:* text box and type the desired name for the folder.
- **Click** the drop down arrow for School and select a school name.
- **Click** on the drop down arrow for Classification, and choose the desired setting for this folder.
- **Click** the *Add* button to save details or *Cancel* to cancel your actions.

2.2   Editing a Folder

To edit a folder:

- **Click** on the 🔳 *Organize Report Library* icon.
- **Click** on a folder name in the list.
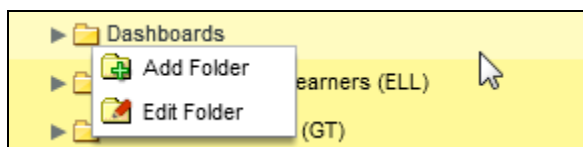- The 📝 *Edit Folder* and ➕ *Add Folder* options display.

Figure 2-3

- **Click** 📝 *Edit Folder*.
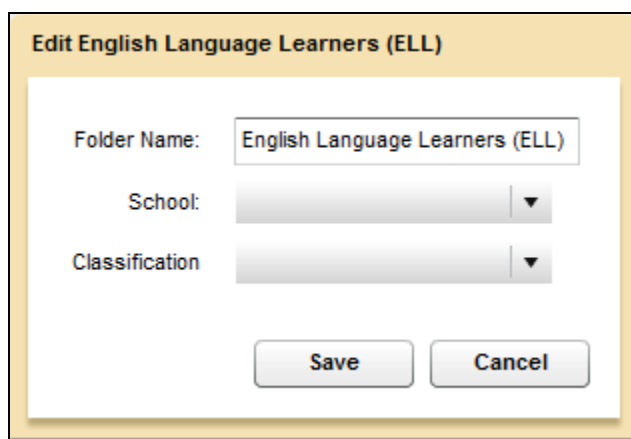- The *Edit <Folder Name>* pop-up window displays.

Figure 2-4

- **Click** in the *Folder Name:* text box and type the desired name for the folder.

- **Click** the drop down arrow for School and select a school name.
- **Click** on the drop down arrow for Classification, and choose the desired setting for this folder.
- **Click** *Save* or *Cancel.*

2.3   Deleting a Folder

Deleting shared folders is a security-driven feature of Inform. You may only delete a shared folder if you were the creator. Personal folders, however, can be deleted at any time.

NOTE: If necessary, first add a folder to your Personal Library. (See Section *1.1 Adding a Folder*)

To delete a folder:

- **Click** on the ⊞ *Organize Report Library* icon.
- **Click** the folder name.

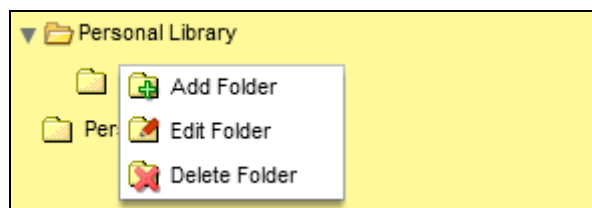- The ⊞ *Add Folder,* ⊞ *Edit Folder* and ⊠ *Delete Folder* options display.

Figure 2-5

- **Click** ⊠ *Delete Folder.*

- The delete *Confirmation* box displays.
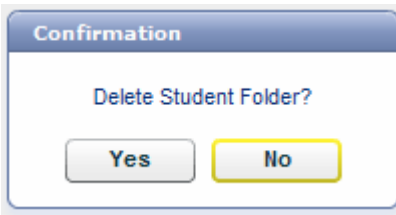
- **Click** *Yes* or *No.*

Figure 2-6

- Your library will update based on your selection.

When you are finished organizing your Report Library, **click** to exit the edit mode. The *Organize Report Library* icon and *Report Library* panel will display in their default view. (See **Figure 1-3**)

3 Organizing Reports in the Report Library

3.1 Adding a Report

The Report Library can be organized according to your preferences. This section will provide the steps for adding a folder to your library.
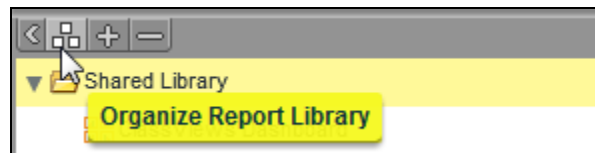
- **Click** the ⊞ *Organize Report Library* icon.

Figure 3-1

- The icon and panel will change to yellow to reflect that you are now in edit mode.
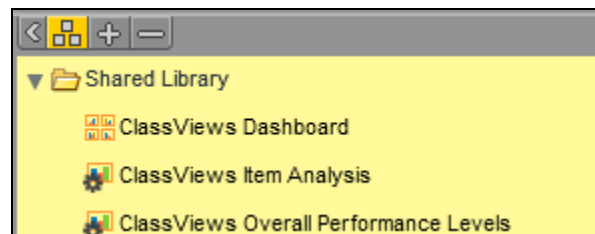

Figure 3-2

- **Click** on a folder row inside the panel.
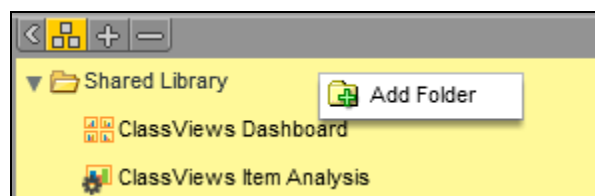- The ⊞ *Add Folder* option displays.

Figure 3-3

- **Click** ⊞ *Add Folder.*

- The *Add Folder* pop-up window displays.

Figure 3-4

- **Click** in the *Folder Name:* text box and type the desired name for the folder.
- **Click** the drop down arrow for School and select a school name.
- **Click** on the drop down arrow for Classification, and choose the desired setting for this folder.
- **Click** the *Add* button to save details or *Cancel* to cancel your actions.

3.2 Editing Report Settings

- **Click** the ▶| dropdown arrow for a folder in the list.
- **Click** a report name.
- The *Edit Saved Report* and *Delete Saved Report* icon options display.
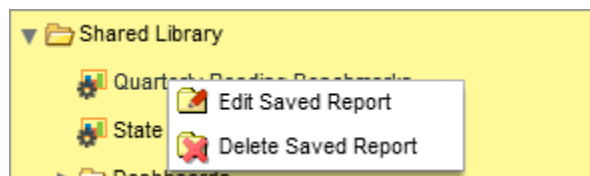

Figure 3-5

- **Click** Edit Saved Report.

- The *Edit <Report Name>* pop-up window displays.

Figure 3-6

- **Edit** the settings.
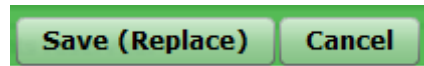- **Click** the *Save (Replace)* or *Cancel* button.

Figure 3-7

3.3   Deleting a Report

- **Click** a report name.
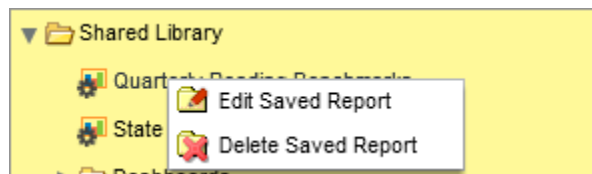- The *Edit Saved Report* and *Delete Saved Report* icon options display.

Figure 3-8

- **Click** ![icon] *Delete Saved Report.*
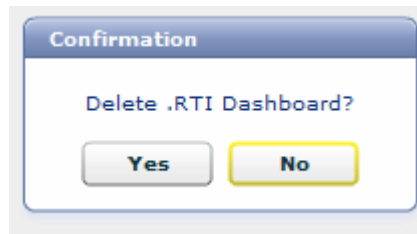- The delete *Confirmation* pop-up window displays with a *Yes* or *No* option.

Figure 3-9

- **Click** the appropriate button.