



Navigating Radius

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Quick Reference: Navigating Radius

Login Screen



Home Page

- Shortcut Set
- **Main Functions**
- Sub Menus
- Your Recent Items •
- Dashboard



Shortcut Set

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Menu

Select to see submenu. Expand each function to access links to menu items.



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Switch Locations

Select to move between Radius Parent Portal and Ravenna applications.

Switch Location	8
6	
Radius Parent Portal	
Senior Academy:	
Log in to Radius Parent Portal	
Ravenna	
Log in to Ravenna	
	Close



Notifications

Select to read notifications. A red notification badge will appear here to indicate a new alert.

Not	ifications	0 New 48 Total
	A new checklist item has been submitted for your approval.	Ê
	11/15/2018 02:34 PM	
	A new checklist item has been submitted for your approval.	Â
	11/15/2018 02:34 PM	
	A new checklist item has been submitted for your approval.	m ·
	11/15/2018 02:34 PM	W
	A new checklist item has been submitted for your approval.	m
	View All Notifications	

Support S.

User Settings

Select your username to change password or email notifications.

Home / User Settings			
User Settings			
<< Hide	Change Password		
Change Password Notifications Settings	Current Password*:		
	Confirm Password*:	Lines (Line Cattless	
	Continue	User Settings	
		<< Hide Change Password Notifications Settings	Notifications Settings Email notifications:



Main Functions

Enrollment, Administration and People are the main menus.



Sub Menus

Select the down arrows to expand each sub menu to see a series of tasks related to the function selected.

Enroliment	*	Enrollment	~	Enrollment	*
Enrollment Center	•	Administration	*	Administration	•
Enrollment		Settings	٠	People	۲
Re-Enrollment		Companies	۲	People	٠
Approvals		Organization	٠	Setup	0
Data Explorer		Setup	٠		
Prospects	· •	Radius	۰		
Reports	•	Communications	۲		
Setup		Communication Cent	er		
Admissions		Communication Temp	plates		
Administration	*	People	× •		
People					

Your Recent Items

A list of the last 23 names or tasks that have been recently visited will build on the right side of the home page. This list is relative to the logged in user and not shared.

The blue text indicates a hyperlink. Click on hyperlink to drill down to your recent item.



Hyperlinks, indicated by **light blue** text, are used throughout Radius to allow the user to quickly access a task or person record.

Dashboard – Enrollment Center

Four interactive charts display statistics and status. Drill into a segment to see more details.

ENROLLMEN	NT STATISTICS							ENROLLMENT CONTRACT STATUS
Enrollment	and Re-E 💙	Year: Curre	ent: 2019-2020	v b	y Grade	~		Year: Current: 2019-2020 V
PK2 PK2 PK3								No Data Posted: 6
PK4 K			-					
2 3 4		-						
5			_					
8 9								
10 11 12								
0	5	10	15	20	25	30	35	 No Data Posted Published In Progress Approved
GENDER AN	D ETHNICITY							RE-ENROLLMENT CONTRACT STATUS
GENDER AN	DETHNICITY	Year: Curre	ent: 2019-2020	► b	y Gender	~		RE-ENROLLMENT CONTRACT STATUS Year: Current: 2019-2020
GENDER AN	D ETHNICITY and Re-E 💙	Year: Curre	ent: 2019-2020	✓ b	y Gender	~		RE-ENROLLMENT CONTRACT STATUS Year: Current: 2019-2020
GENDER AN	D ETHNICITY	Year: Curre	ent: 2019-2020	▶ Þ	y Gender	~		RE-ENROLLMENT CONTRACT STATUS
GENDER AN	DETHNICITY	Year: Curre	ent: 2019-2020	▼ b	y Gender	~		RE-ENROLLMENT CONTRACT STATUS Year: Current: 2019-2020
GENDER AN Enrollment a Female Male	D ETHNICITY	Year: Curre	ent: 2019-2020	✓ Þ	y Gender	~		RE-ENROLLMENT CONTRACT STATUS Year: Current: 2019-2020 V
GENDER AN Enrollment a	D ETHNICITY	Year: Curre	ent: 2019-2020	✓ Þ	y Gender	~		RE-ENROLLMENT CONTRACT STATUS Year: Current: 2019-2020 V
GENDERAN Enrollment a	D ETHNICITY	Year: Curre	ent: 2019-2020	✓ Þ	y Gender	~		RE-ENROLLMENT CONTRACT STATUS Year: Current: 2019-2020 V

Use the "Skip To" menu to navigate to each record identified in the data segment.

≡ ≠	Support S.	Q
< 1 of 6 > Skip to:	Martha Allen	~
	Martha Allen	
	Jennifer Barnes	
	Michael Barnes	

Search Window

- Quick Filters
- Filter Sets
- Settings and Export
- Search Grid and Pivot View -
- Enrollment Tasks
- Page Navigation

Quick Filters

Enter a First or Last name in the **Quick Search** field to sort the Search Grid by name.

ef 1

Sac Filter v Reset Ø v

Quick	k Search:	Y
★ × Se	lect 3 students	IVOT TABLE
	Last Name	First Name
	Allen	Gloria
	Allen	Martha
	Davis	Allen

Enter the name "Allen" and select the Search button for any student with first or last name containing Allen will appear in the list. Filters by Year, Division, Grade, Decision, Contract Status and Student Group can be used alone or in any combination to review a subset of student data in the Search Grid.

Quick Search:	Year:	Division:		Grade:		AR Group:		
Allen	Current: 2019-2020 🗸	Upper School	~	All	~	All	~	Search
		Enrollment Status:		Contract Status:		Student Grou	ip:	Clear
		All	~	In Progress	~	All	~	

Filter Sets

Filters are used in place of queries. Filter sets are created by the user and can be saved for loading later.

Create a Filter

Example: boarding students who have paid their deposits:

1. Find Boarding Students

- Expand Matriculation menu by clicking + icon
- Select Board/Day from the list
- Refine the filter
 - Select an operator: Is Equal To
 - Select the value: Board
- 2. Find by Deposit Status
 - Expand Re-Enrollment Information
 - Select Deposit Paid



- Refine the filter
 - Select an operator: Is One of
 - o Select multiple values: Yes, Waived
- 3. Select Apply button





Save Filters

- 1. Refine the filter
- 2. Select Save Filter
- **3.** Enter a name for the filter
- 4. Select Save icon

Saved filters are relative to the logged in User, these are not shared.

Load Saved Filters

- 1. Select Load Saved Filters
- 2. Select from list (i.e. Board)
 - Use the Reset button to remove loaded filters

Reset Filters



Select the reset button to clear loaded filters

Filter Settings



Load Saved Filter

Load Saved Filter

Board Deposit Paid

Yh

Settings and Export



Settings: select gear icon



COLUMNS

• Select/deselect column headings to customize visibility of data on Search Grid.

Settings

• Select Restore Default Settings and Save to clear all filters and to reset column headers and sort order back to the default set.

Search Settings	8
To restore the default settings for this search screen please click the button below.	
Kestore Detault Settings	Save Cancel

Export: select worksheet icon



EXPORT VISIBLE

- Download data, specific to visible columns on the Search Grid
- File name = SearchGridResults.xlsx

EXPORT ALL DATA

- Download all relative data regardless if the column is visible on the Search Grid
- File name = SearchGridResults.xlsx

Selecting checkboxes next to a student name does not affect exported data. If the Search Grid results reflects 44 items the exported file will contain one row of information for each of the 44 items.

Search Grid and Pivot Table

Toggle between Search Grid and Pivot Table to explore your data.

SEARCH GRID is the list view of data.

SEARCH G		TABLE			10 ⁻	
ID	Last Name	First Name	Grade 🕳	Year	Division	Enrollment
BEGA012	Begamanian	Carol	РК	2018-2019	Lower School	Re-Enrolled
LERO012	Lerondar	Lisa	РК	2018-2019	Lower School	Re-Enrolled
STON012	Stonnagan	Samantha	РК	2018-2019	Lower School	Pending

Pivot Tables work with the records on the current search screen. The pivot table will display results for up to 500 records. Best Practice is to use Search Filters to filter records to less than or equal to 500.

PIVOT TABLE is the chart view of data.

- Select a View on the left (Heatmap, Table and Charts)
- Select a Function on the right(defaults to Count)

Table 🔻		Count 🔹 🗘 🗧	→ Gender	*				
Re-Enrollment Denosit Paid *	-	Board Day *			Gender	Female	Male	Totals
Re Enrollment Deposit Faid			Board Day	Grade		Terrare	1- Indice	Totala
Re-Enrollment Signature Complete *		Grade *		9		1	5	6
				10		4	4	8
Enrollment Status *			Board	11		8	7	15
Division *				12		4	11	15
BIVISION -					Totals	17	27	44
Age * Grade Type * City *	I							

• Drag and drop fields from left to right

Enrollment / Re-Enrollment Task Buttons

Post Re-Enrollment Data	Send Email View Saved Contracts	9 Unpublish Contract

Frequently used tasks can be initiated from the search screen using the buttons shown above. Select at least one person from the Search Grid and then choose the appropriate task button.

Page Navigation

- Use page numbers and controls to scroll through Search Grid pages
- Set Items per page to 15, 25, 50 or 100



User Experience

Common Navigation and Icons

	Toggle editing button On/Off to switch between Data Entry and View mode		
Home / Search / Re-Enrollment	Breadcrumb navigation allows user to click		
< 1 of 46 > Skip to: John Lane 🗸	"Skip to" navigation. Use arrows or drop down menu to select a record		
+	Add		
2	Alert badge count		
Katherine Clark (Katie)*	Asterisk next to record name indicates an unsaved change has been made to the record		
Last*:	Asterisk (Red) indicates a required field		
₩ O	Date and Time		
\$	Default settings: Set columns or reset default columns		
-	Delete		
(U)	Edit		
x	Export to Excel		
۲ MERGE	Merge records		
~	Review		
	Row order: drag and drop rows up and down		
۹	View		

Quick Tips

Column order

• Single click on a column and drag and drop into place



Column Sort Ascending/Descending

 Click on column head one time to sort in ascending order. A small arrow appears next to column header to indicate the sort direction. (up for ascending, down for descending)

Tuition Amount 👻

Column Width

• Hover over border of column heading until double arrows appear. Drag to adjust.



Changing dates

- Select Calendar icon to change dates
- Select the Year at the top of a date box to see array of years
- Select the year and see array of months
- Select the day



Hyperlink Options

Hyperlinks, indentified by **Blue text**, allows the user to open record details.

• **Right click** on hyperlinked name to open the record in a new tab, preserving the sorted list on the Search Grid in a separate tab

	Last Name	F	First Name	Grade	
	Evans	Emm		10	Linnar C
	Hall	с	Open link in new tab		
1	Bell	Jo	Open link in	n new window	N

- **Single Click** on the hyperlinked name to open the record
- Note the "Skip To" menu in upper right corner of the record
 - The list in the "Skip to" menu mirrors the sorted list on the Search Grid

1 of 19	>	Skip to:	Emma Evans	~
			Emma Evans	A
			Charles Hall	-0
			Jonathan Bell	
			Kayla Adams	
			Benjamin Adams	
			Angela King	-

Shortcuts to Home

To return toHome screen

• Select "home" form breadcrumb navigation



• Select the Radius logo to return to Home screen

