Define Roll-Ups

This How-To-Guide describes the use and purpose of Roll-Ups along with how to create them within KSA.

Roll-Ups are used to name a grouping of like transaction types for users who prefer to see a minimized view of a student's transactions. Roll-Ups are attached to each transaction type and used by the Account Roll-Up Transaction view. When viewing an account using the Roll-Up Transaction, each grouping or Roll-Up can be further opened by selecting the + sign to display all of the transactions that are within that Roll-Up.

This guide covers the following topics:

Terminology

The page KS Glossary of Terms Template could not be found.

How-To Steps

The following outlines the steps for adding Roll-Ups and their purpose in KSA .

Once you have signed into KSA and have the appropriate permissions, select the Settings tab from the top navigation tabs, then select Roll-Ups from the Navigation on the left side. The currently added Roll-Ups are displayed.

Add a New Roll-Up

Roll-Ups are added to transaction types for grouping that transaction type with others of like nature. For example; all Tuition Charges transaction types might carry a Roll-Up of Tuition.

In the initial view of Roll-Ups, a new Roll-Up can be easily entered by filling in the blank fields at the top of the Roll-Up Summary screen. Enter a unique Roll-Up Symbol or Code (up to 45 characters), the Name (up to 100 characters), and Description (up to 2000 characters). Select the Add button to the far right to insert the new Roll-Up into the database. Upon saving, a unique Roll-Up ID is assigned to the Roll-Up Code. A message will be displayed at the top to indicate whether or not the Roll-Up was inserted successfully. Scrolling thru the Roll-Ups listed the newly added Roll-Up should be displayed and is now eligible for editing.

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Edit an Existing Roll-Up

When a user wishes to Edit an existing Roll-Up to be used with transaction types, navigate to Settings/ Roll-Ups.

From the initial display of Roll-Ups, a user with appropriate permission can modify or Edit an existing Roll-Up by selecting the Edit button to the far right of the Roll-Up to be edited. The Roll-Up dialog box is opened for editing. This dialog box allows modification to the Roll-Up 's Name and Description. Once the desired modifications are complete select the Submit button at the bottom and the changes will be saved to the database. A message is presented to the user at the top to signify whether or not the change was successful or if there were any errors. If everything is complete, select the Roll-Up Type Summary link at the top to navigate back to the Roll-Up Summary listing.

Reference Documentation

- Add and link some reference, such as a related Technical Guide
- Add and link another reference, such as a related How-To-Guide

Internal Resources

- Add and link an internal reference, such as a Google Doc
- Add and link another internal reference, such as a user story or requirement
- Add and link another internal reference, such as a milestone demo