

## Appendix B – Comment Bank Variables and Setup

### Create Comments in a Comment Bank

After you create a comment **bank**, define the comments that are available within the **bank**.

When you create a comment, you can use variables to call information specific to the record or student the comment is being entered for. For example, if you use the variable `{{person.firstName}}`, the system inserts the student's first name where the variable appears in the comment text:

*{{person.firstName}}* is a pleasure to have in class = **Jane is a pleasure to have in class**

To create comments in a comment **bank**:

1. Do one of the following:
  - For a district: Log on to the District view. Click the Admin tab, then the Data Dictionary side-tab. On the Data Dictionary side-tab, click Comments.
  - For a school: Log on to the School view. Click the Admin tab and the Comments side-tab.
  - For staff members: Log on to the Staff view. Click the Tools tab and the Comments side-tab.
2. A list of any comment banks already created appears. Select a comment bank, and click Codes on the Data Dictionary side-tab.
3. On the Options menu, click Add. The New Comment Bank Code page appears.
4. In the ID field, type an identifier for the comment, such as a number or short combination of letters and numbers to identify the comment for users. Users can use this ID to search for the comment.
5. In the Preview field, type the text of the comment to let users know what will be inserted in the field if they select this comment. This does not have to match the value you enter in the comment field. For example, you might type (Student) is disruptive in class so that users will know the student's name is inserted once they select it.
6. In the Code field, type the actual comment. You can include a variable, which is text enclosed in double curly braces `{{xxx}}` and a filter, which is pipe-delimited text after a variable (hold the Shift key while clicking the backspace key to create the `|` symbol). For example, `{{studentName|capitalize}}` prompts the system to insert Jon instead of jon.

7. Use the following table to enter the available filters in your variables:

Filter Type	Description	If you type this:	This appears in the comment:
Count	The number of elements in a collection.	{{student.conductIncidents count}}	2 (the student has 2 conduct incidents on record)
Capitalize	The system capitalizes the first letter.	{{person.firstName capitalize}}	Elizabeth
Titlecase	The system enters the text in titlecase format.	{{"parents and caregivers" titlecase}}	Parents and Caregivers
Titlecase	The system enters the text in titlecase format.	{{"parents and caregivers" titlecase}}	Parents and Caregivers
Ordinal	The system enters a numerical value in ordinal format.	{{person.firstName}}'s {{student.conductIncidents count ordinal}}incident was the last documented offense.	Timothy's third incident was the last documented offense.
Upper	The system enters the text in all uppercase.	{{person.firstName upper}}	JANE
Lower	The system enters the text in all lowercase.	{{person.firstName lower}}	jane

Filter Type	Description	If you type this:	This appears in the comment:
Trim	The system enters the text with all white space trimmed.	{{person.physicalAddress.addressLine01 trim}}, such as xxx123 Main Streetxxx	123 Main Street (the address without any spaces before or after the text)
Gender	The system enters the gender term based on "Male" or "Female".	{{"Male" gender:boy,girl,it}}	Gender
Length	The number of characters in text.	{{person.firstName length}}, such as Jane	4 (number of characters in the student's name)

**Note:** You can chain filters by adding more filters separated by pipe (|) characters. For example, if you wanted to lower a text and then immediately capitalize it, you could use {{variable|lower|capitalize}}.

8. In the Category 1-3 fields, you can enter specific names for the categories defined for the comment bank itself. For example, if the comment bank has Category 1 defined as Department, Category 2 defined as Course, and Category 3 defined as Level, the specific categories you might enter for a comment could be English, Creative Writing, and AP.
9. Select the Disabled indicator checkbox if you do not want this comment to appear in the pick list for any users. For example, this would let you remove it from view without deleting it permanently.
10. Click **Save**.

**Note:** Staff members who create comment bank codes for school-owned banks will lose the codes if they move to a different school. However, codes created for comment banks owned by the Enterprise or district will remain if the user who created them changes schools within the Enterprise or district.