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Ad Hoc Reporting Manual

Infinite Campus

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About Infinite Campus

Infinite Campus is a comprehensive, Web-based K-12 student information system (SIS) with real-time access to administration, instruction, communication, curriculum, reporting and analysis, data warehousing functionality and more. For 25 years, Infinite Campus has successfully implemented its solutions for customers of all sizes. Managing 7.8 million students in 45 states, Infinite Campus is the most trusted name in student information. Infinite Campus customers range from school districts with fewer than 100 students to those with more than 600,000, as well as regional consortia, state departments of education and the federal government.

About Custom Computer Specialists, Inc.

Headquartered in Hauppauge, NY, Custom Computer Specialists, Inc., is a leading privately held Long Island based technology solution provider. Custom delivers a wide array of technology services including: project management, on-site staffing, managed services, networking and wireless solutions, desktop installation, and service and support.

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AD HOC REPORTING

Description

The Ad Hoc Module allows the user to create filters that can be used within Infinite Campus to search or run reports based on a selected group of students/courses/census data. In addition, filters can be used to create reports not available through Infinite Campus. These reports can be exported out of Infinite Campus into different programs (i.e., Excel).

Target Audience

This manual is intended for District and School staff who need to consistently search for groups of students, or who need to create customized reports.

Objective

The purpose of this manual is to assist staff in understanding how the Ad Hoc Filters (and report writing) functions operate.

Vocabulary

Data – Information entered into a *field* and stored in the Infinite Campus database.

Export – The data collected using a *filter* can also be taken out of Infinite Campus for use with other programs, such as Microsoft Excel, or sent directly to a PDF report to be emailed or printed.

Filter – This term is used to designate a list (of students, courses, staff/parents).

Field – Spaces in Infinite Campus holding *data*. The *field* labeled 'First Name' contains the *data* of every student's first name.

Field Name – The internal designation of a *field*. Using the above example, inside Infinite Campus it is 'firstName', and in Ad Hoc it may be seen as 'student.firstName' which is the table.fieldname listing.

Function – the ability to create a combined *field* in a filter, or use a stored command.

Operator – a method of comparison between the *data* and a listed *value* for the *Query Wizard* criteria.

Query Wizard – The Query Wizard allows the user to set up a *filter* that will use Infinite Campus' *fields* with *data* that match specific criteria. (For example, all students named 'Thomas' that have a GPA over 3.5).

Selection Editor – allows the user to manually 'select' the individual students or people, or staff for the *filter*. This is generally used for filters that cannot be created using the *Query Wizard*.

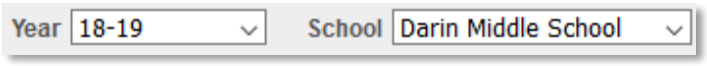
Value – the target for a comparison when using the *Query Wizard.* Example: all students whose grade level = '07'. ('Grade level' is the *data*, '07' is the *value*, '=' is the *operator*.)

SELECTION EDITOR

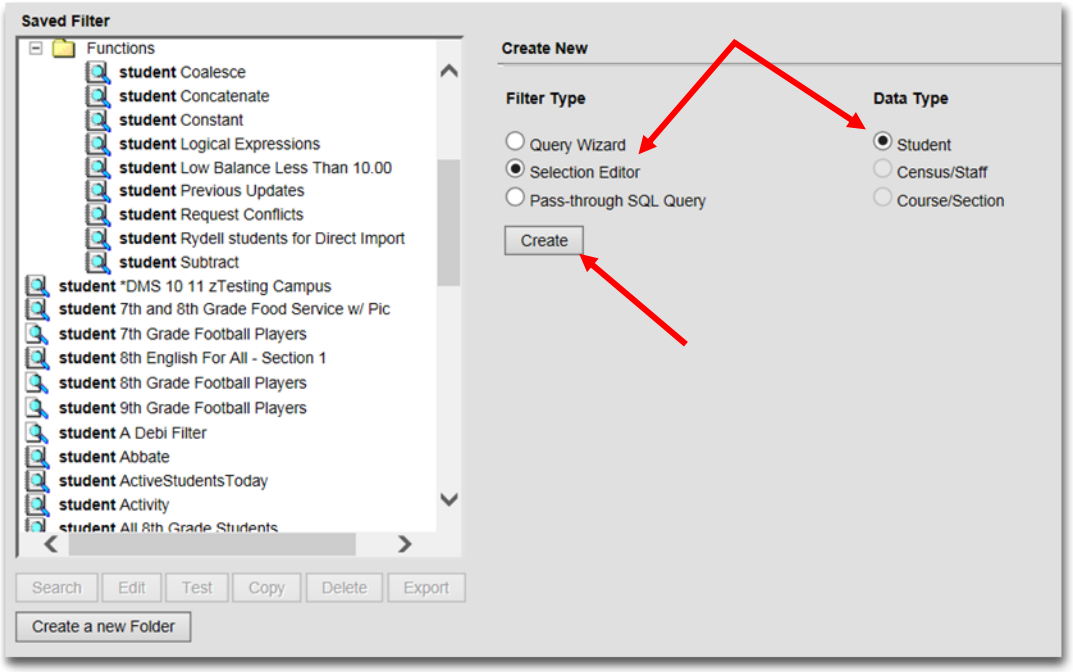
Selection Editor is used to create filters for students who have nothing in common inside the Infinite Campus system; as well as, for census/staff records. For example, the Selection Editor might be used to create a filter for the students in the Chess Club – there is no field in Infinite Campus that designates these students as being members of the Chess Club. This filter creates a static list, which must be manually maintained by the user.

Creating a Student Selection Editor Filter

1. Choose the correct school on the Infinite Campus toolbar.

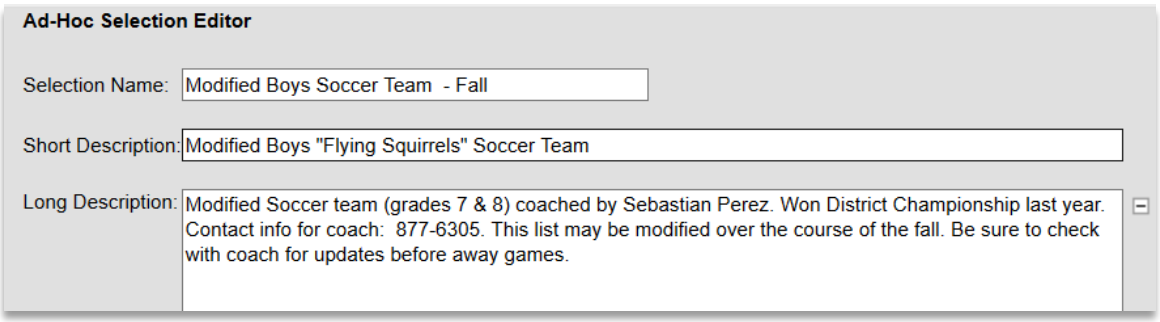


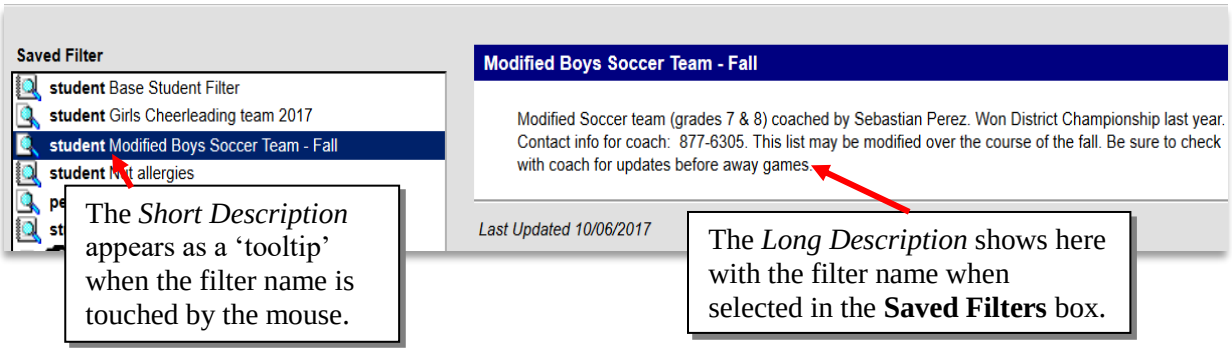
2. Under the Index, select *Ad Hoc Reporting > Filter Designer*.
3. Under **Create New** – click on the <Selection Editor> button for **Filter Type**.
4. Click on the <Student> button for **Data Type** (when creating a filter using the Selection Editor, currently the only available Filter Data Types are Student or Census/Staff).



5. Click on the <Create> button.
6. Type the *Selection Name* of the filter. This should be descriptive of the students listed (i.e., Chess Club, After School Students, Football Team).

7. Type a *Short Description*, if desired. This will be the 'tool tip' that is seen when the mouse hovers over the filter name in the **Saved Filters** list.
8. Type a *Long Description*, if desired. Click on the + to expand the text box. This description will display when the filter is selected from **Saved Filters** list. Click the – (minus symbol) to collapse the text box.





9. The students will display by grade level in alphabetical order in the **All Students** box.

   To choose a student:

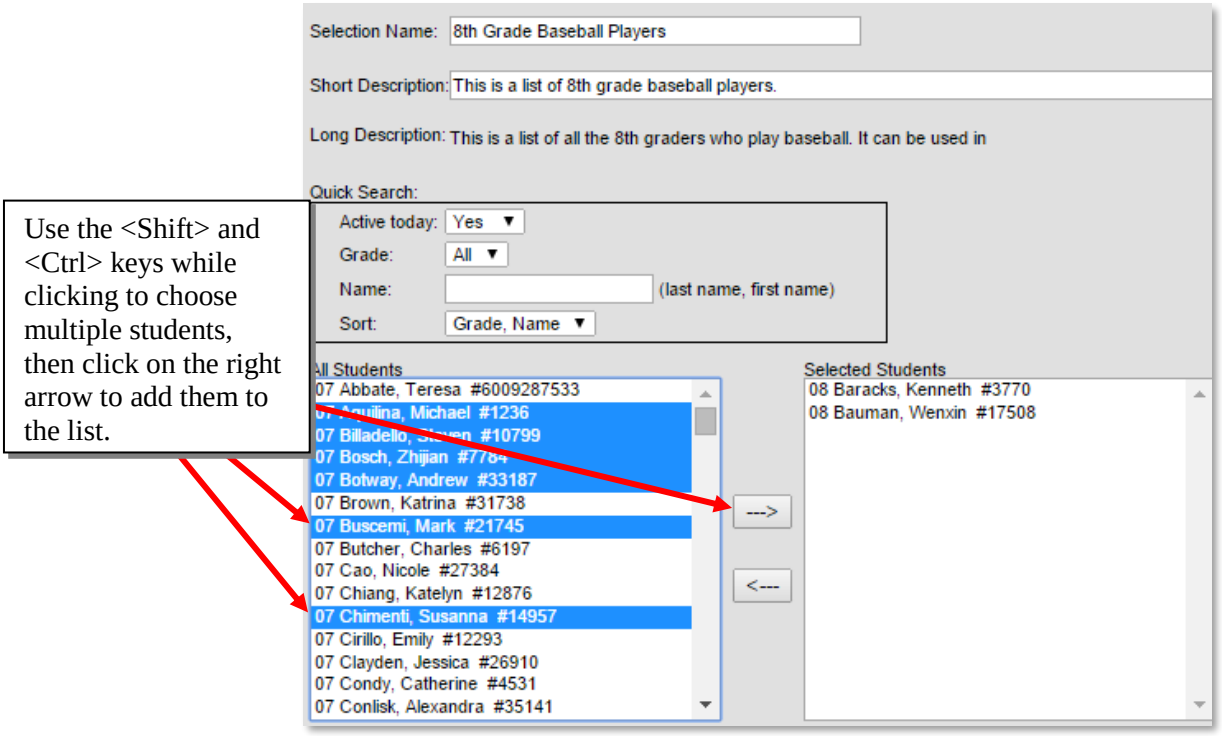
   a. Click on the student's name.

   b. Click on the right arrow between the boxes. This will place the student in the **Selected Students** box.

   To choose several students:

   a. Click on the first student's name. Hold the mouse button down and drag up or down to select all students in adjacent on the list. To pick a number of individual students, press and hold the <Ctrl> key (on the keyboard) and click on each student.

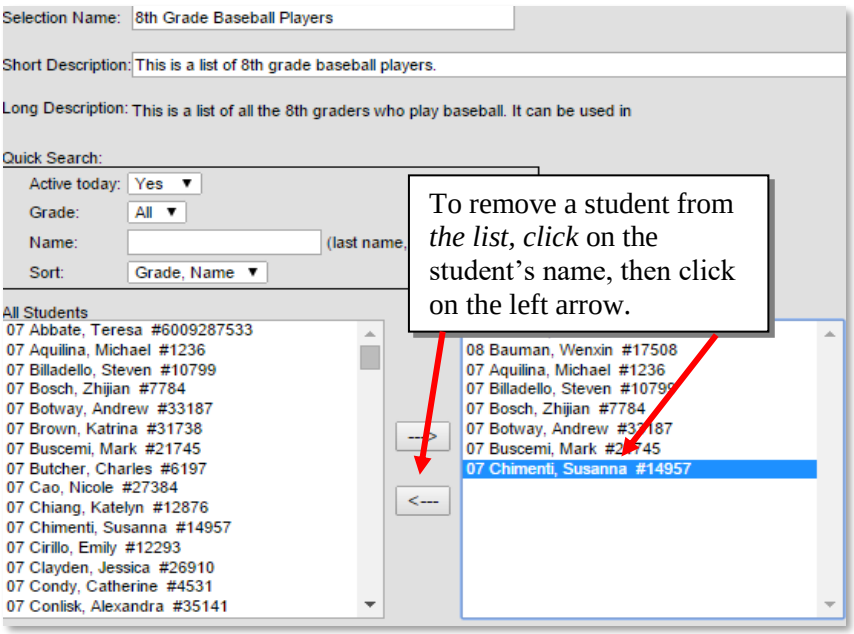
   b. Once selected, click on the right arrow between the boxes. This will place the highlighted students into the **Selected Students** box.



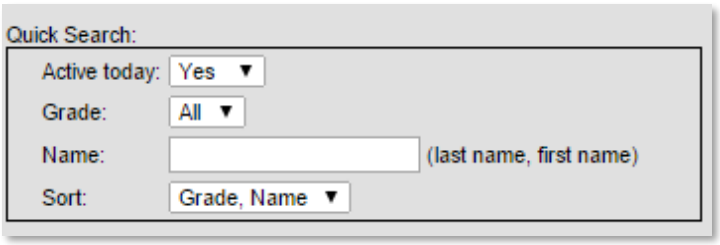
10. To remove students from the **Selected Students** box:

    a. Click on the student's name in the Selected Students box. (Multiple students can be selected using the same steps as above).

    b. Click on the left arrow between the boxes.



11. *The Quick Search* allows the user to display and/or narrow down the 'All Student' column using filters.



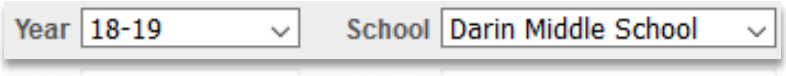
    a. *Active Today*: When set to ***yes***, only students with active enrollments as of the current date display. When set to ***no***, only students without active enrollments as of the current date display. When set to ***both***, active and inactive students will display. Inactive students will display in red.
    b. *Grade*: If a grade level is selected, only students with an active enrollment record in that grade will display.
    c. *Name*: This tool (last name, first name) filters to look up a particular student. Students are actively filtered as characters are entered into the field
    d. *Sort*: Users have the ability to display the student list by grade/alpha or just alpha.

12. *Save To:* – this section allows the user to save the filter to his/her account or to share with others.
    a. Choosing *User Account* will save the filter to be used by the creator only.
    b. If the user has created at least one folder, they can select a folder within his/her account. See the Folder section for more information.
    c. Other options include sharing to any group listed. These are the Security Groups to which the user belongs.

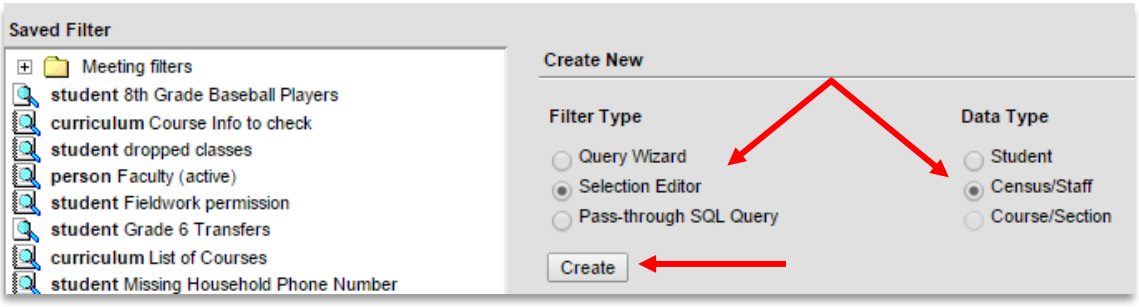
13. Click on the <Save> button.

Creating a Census/Staff Selection Editor Filter

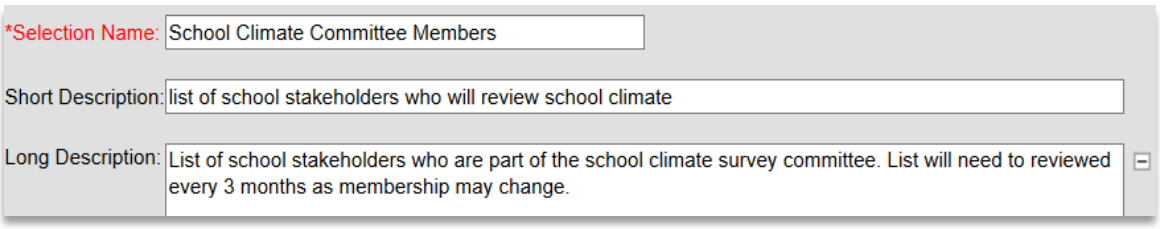
1. Choose the correct school on the Infinite Campus toolbar. Note: Census data is not stored in a calendar.

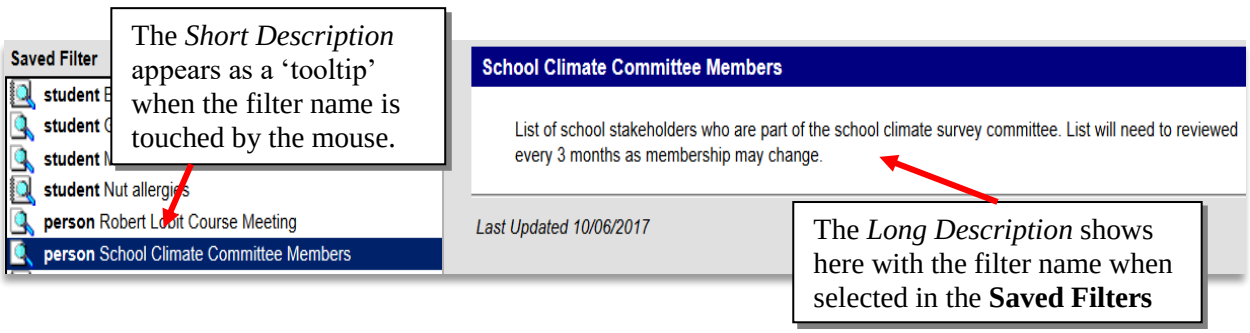


2. Under the Index, select *Ad Hoc Reporting > Filter Designer*.
3. Under **Create New** – click on the <Selection Editor> button for **Filter Type**.
4. Click on the <Census/Staff> button for **Data Type** (when creating a filter using the Selection Editor, currently the only available Filter Data Types are Student or Census/Staff).



5. Click on the <Create> button.
6. Type the *Selection Name* of the filter. This should be descriptive of the List needed (i.e., School Climate Committee Members, Trip Chaperones).
7. Type a *Short Description*, if desired. This will be the 'tool tip' that is seen when the mouse is moved over the filter name in the **Saved Filters** list.
8. Type a *Long Description*, if desired. Click on the + to expand the text box. This description will display when the filter is selected from **Saved Filters** list. Click the – (minus symbol) to collapse the text box.

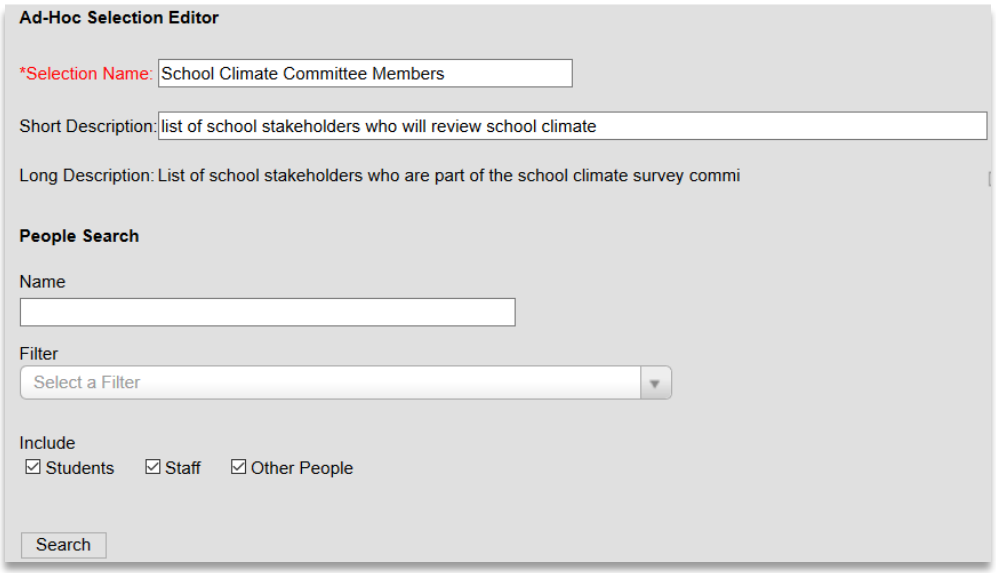


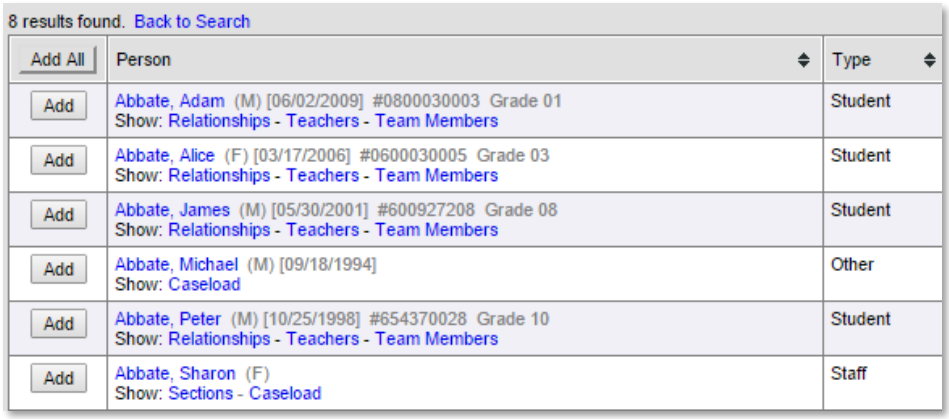


9. In the People Search area, enter the name of those to include in the filter (at least one letter must be entered to return results). If needed, select a filter from the dropdown list.

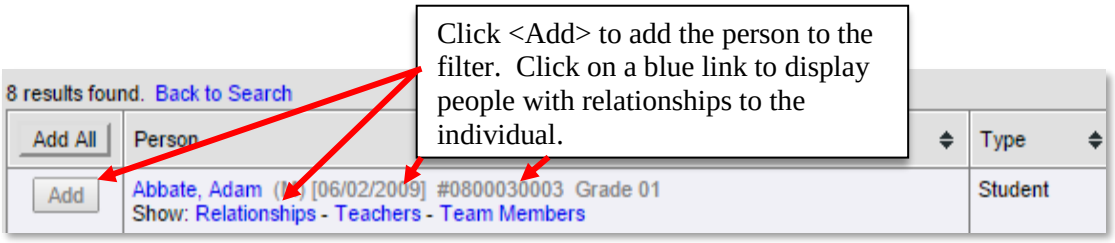
Special Note:
Both the Name field and a filter can be used, resulting in an intersection of the data. For example, if a user enters "Smith" and selects the "football filter', then the search will only return football players with the last name Smith.

10. Determine which type of data to include in the search: students, staff, other people (all checkboxes can be selected)
11. Click the <Search> button. Results will display with the person's name, identifying information, and person type (student, staff, other).
    a. Clicking on the person's name displays a Person Summary Report
    b. Clicking one of the ***show links*** for the person displays secondary results (i.e. Relationships, Teachers, Team members, caseloads, Sections)

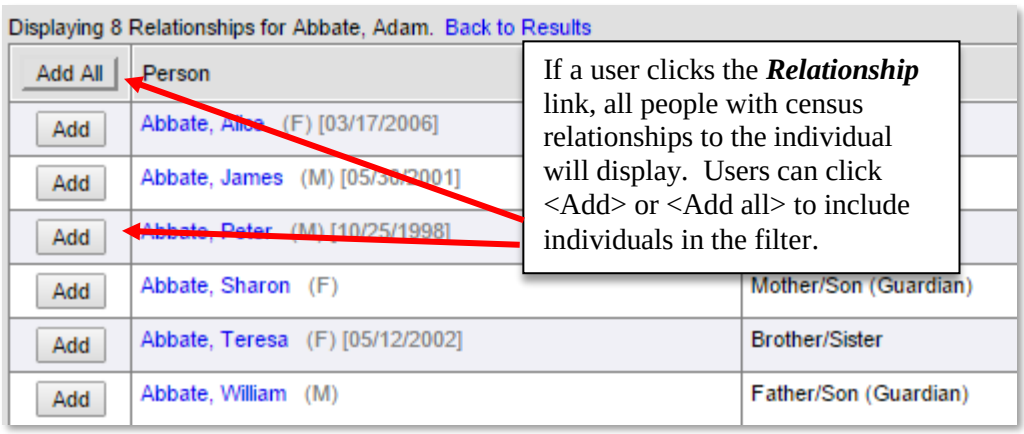




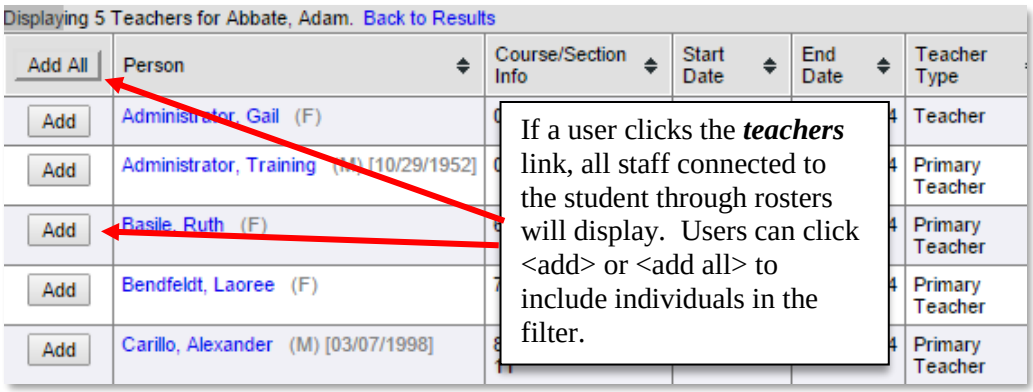
12. Click the <Add> button to add the person to the filter. His/her name will display in the selected people box. Click the <Add all> button to add all the people in the results list.
    a. To add secondary relationships, click the desired blue link. People connected to the individual will display. Click the <Add> button to select the person for the filter.



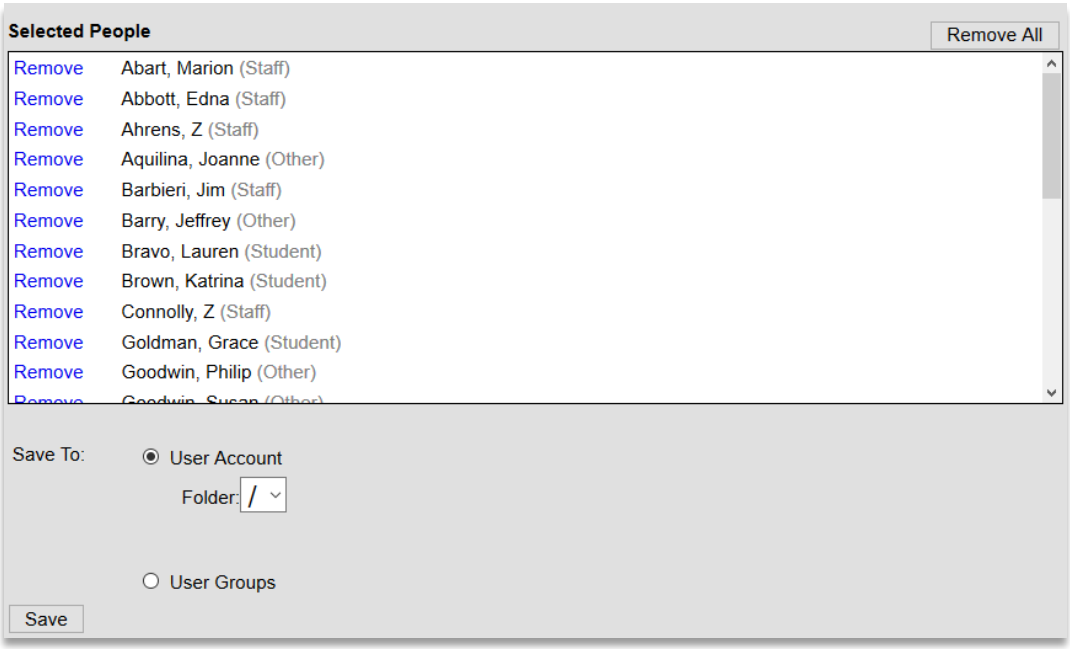
Example of adding People with Relationship Links



Example of adding People with Roster Links



13. Click **Back to Results** to search for additional people to add to the filter and to view the list of ***Selected People***.

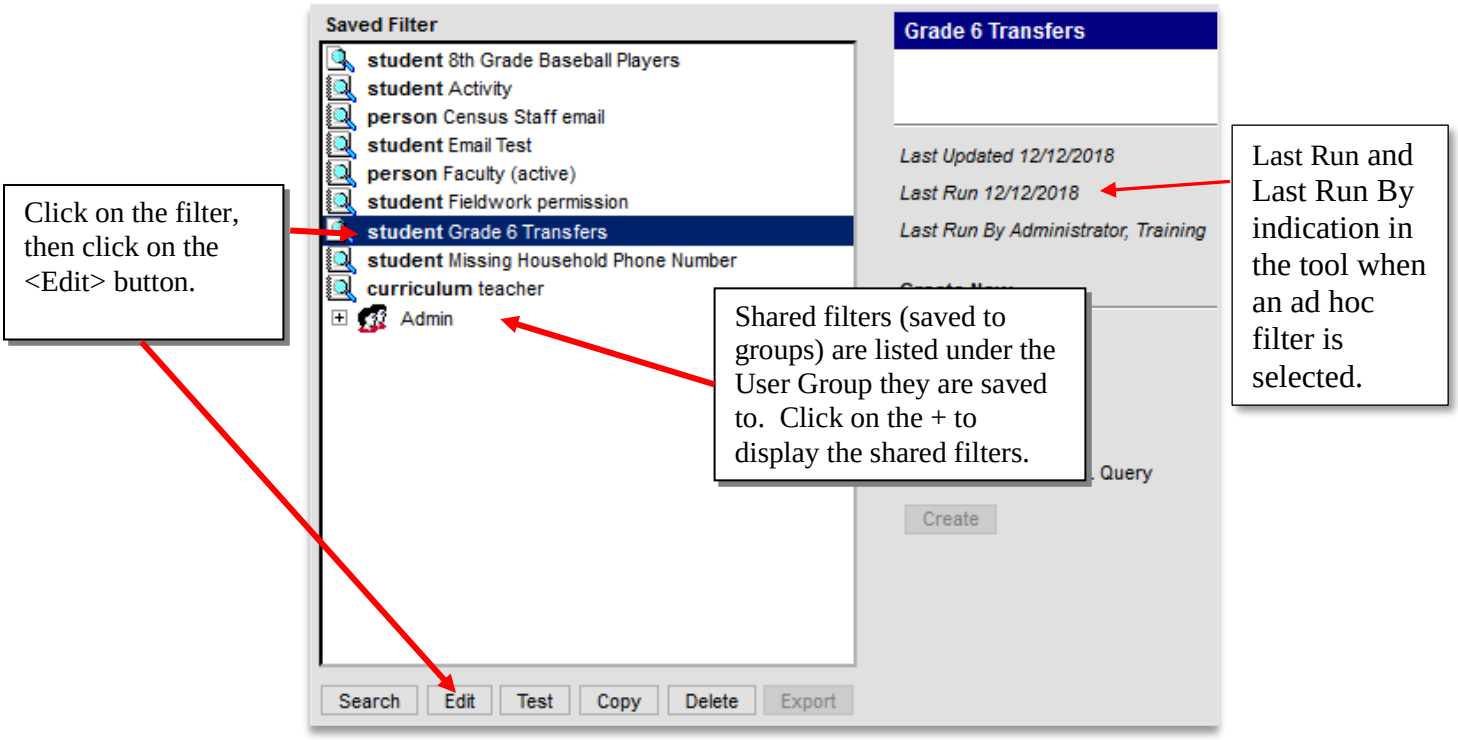


14. Repeat Steps 9-12 until all individuals have been added to the filter
15. *Save To:* This section allows the user to save the filter to his/her account or to share with others.
    a. Choosing <User Account> will save the filter for use by the creator only.
    b. If the user has created at least one folder, they can select a folder within his/her account. See the Folder section for more information.
    c. Other options include sharing to any group listed. These are the Security Groups to which the user belongs.
16. Click on the <Save> button.

Editing a Saved Selection Editor Filter

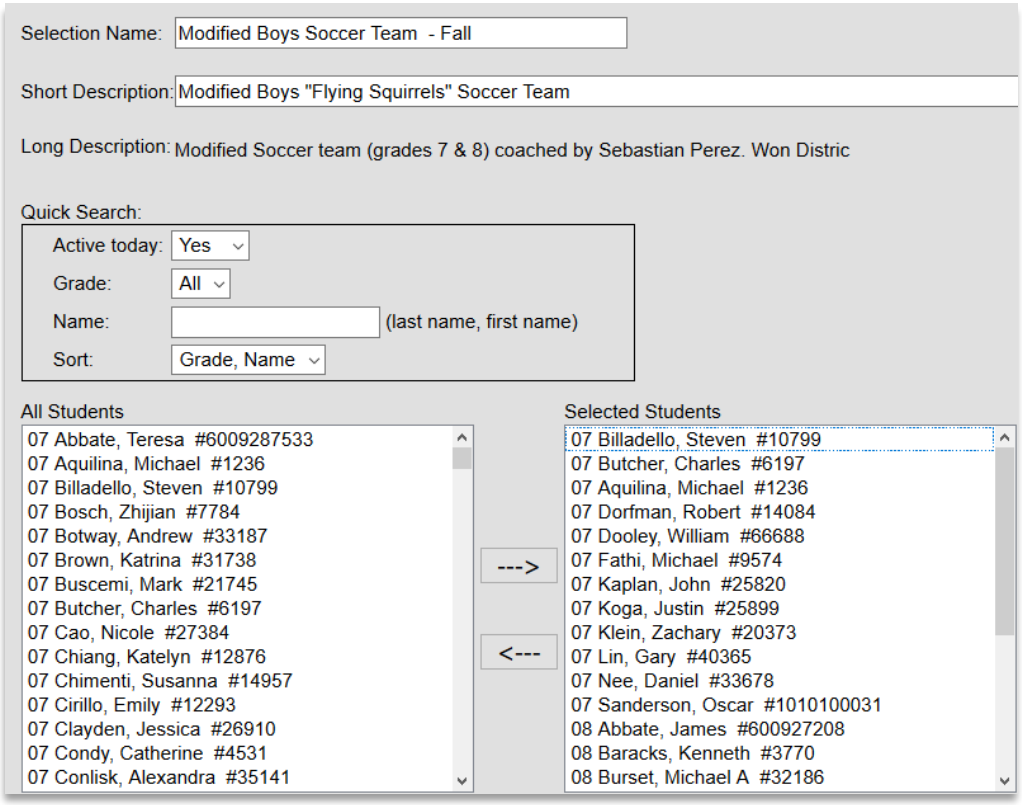
With a Selection Editor filter, whenever the list of students/people in the group needs to be changed, the user must manually update the list in the Filter Designer.

1. Navigate to *Ad Hoc Reporting > Filter Designer*.
2. In the **Saved Filters** box, click on the filter to edit. (If saved to a group, click on the + next to the group to expand the list.)

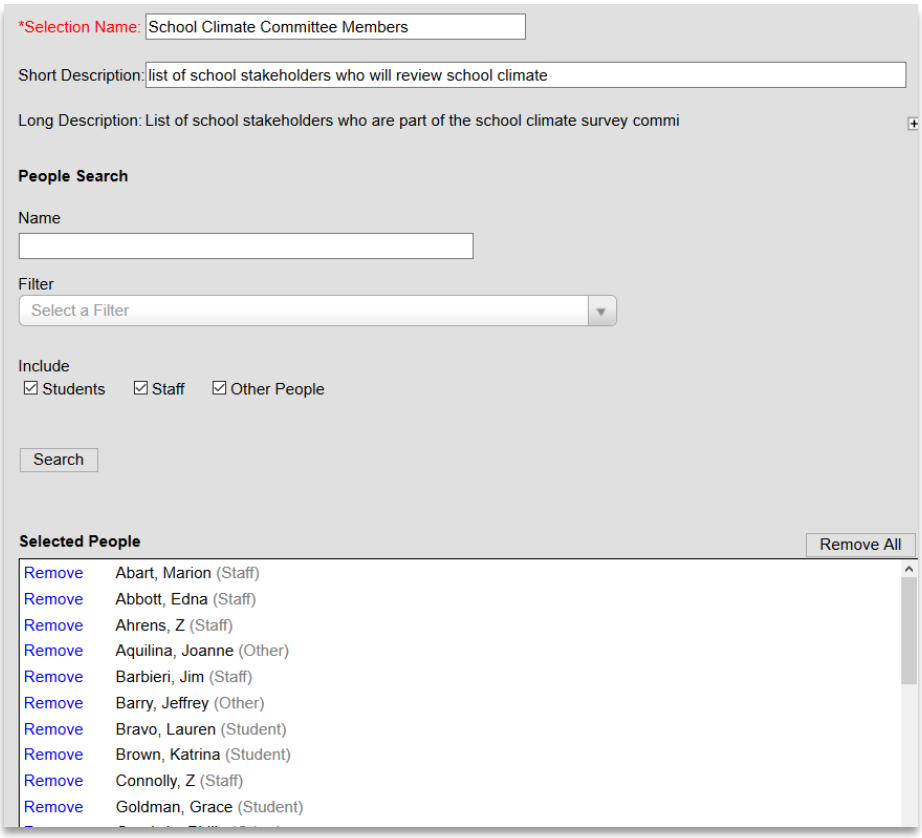


3. Click on the <Edit> button.
4. The filter will display. Edit the filter by adding or deleting students/people.

Example of Editing a Student Selection Editor



Example of Editing a Census/Staff Selection Editor

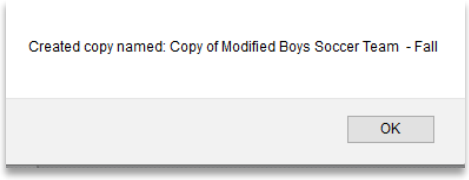


5. When done, click on the <Save> button.

Copy the Selection Editor Filter

Filters can be copied for a variety of reasons. If two filters are needed that are similar, a copy can be made and then edited to reflect the different students/people. In addition, filters can be copied so a user can keep the filter in their 'User Account' and then save the copy to group to share with others. This ensures that their original filter will not be edited by other users.

1. Navigate to *Ad Hoc Reporting > Filter Designer*.
2. In the **Saved Filters** box, click on the filter to copy. Any filter saved to a group will display under the group name, click on the + next to the group to display all the shared filters.
3. Click on the <Copy> button.
4. A notice will display that the filter has been copied. Click on the <OK> button. Copies are always added to the User Account, regardless of source.



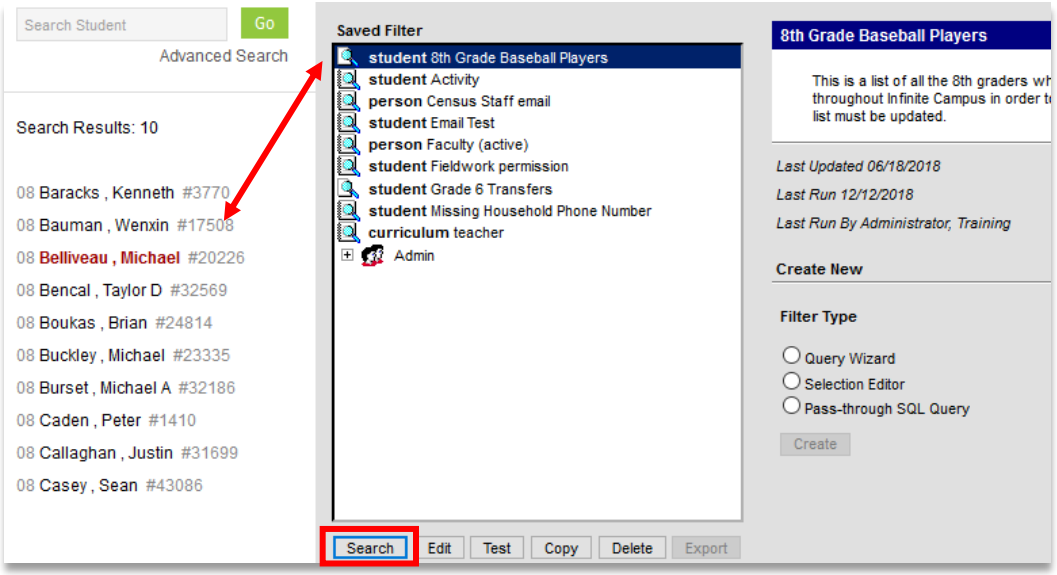
5. Click on the copied filter, then click on the <Edit> button to make any changes needed (i.e., new name, change the students in the list, share with other users).

Delete the Selection Editor Filter

1. Navigate to *Ad Hoc Reporting > Filter Designer*.
2. In the **Saved Filters** box, click on the filter to delete. Any filter saved to a group will display under the group name, click on the + next to the group to display all the shared filters.
3. Click on the <Delete> button.
4. A warning will display. Click on the <OK> button to delete the filter.

Searching Using the Selection Editor Filter

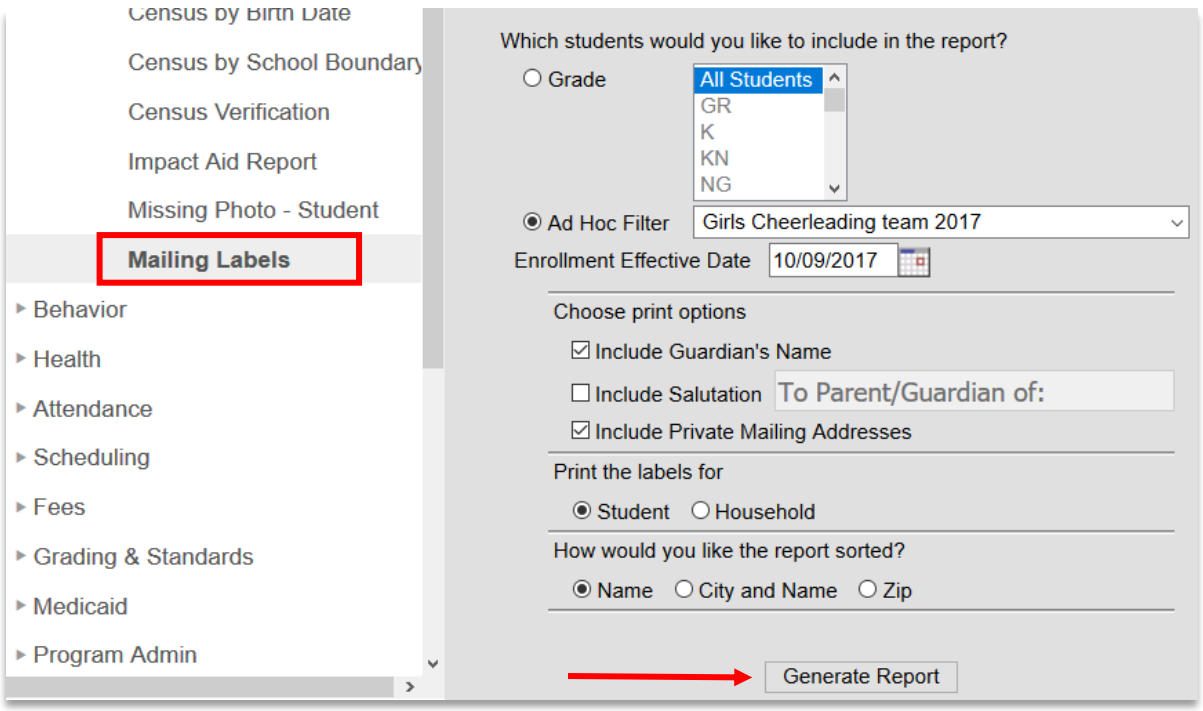
1. Navigate to *Ad Hoc Reporting > Filter Designer*.
2. In the **Saved Filters** box, click on the filter. (Any filter saved to a group will display under the group name, click on the + next to the group to display all the shared filters. Then select the filter needed.)
3. Click on the <Search> button at the bottom of the **Saved Filters** box. The people included in the filter will display in the **Search Results** box in the Navigation Pane.



Using the Selection Editor Filter

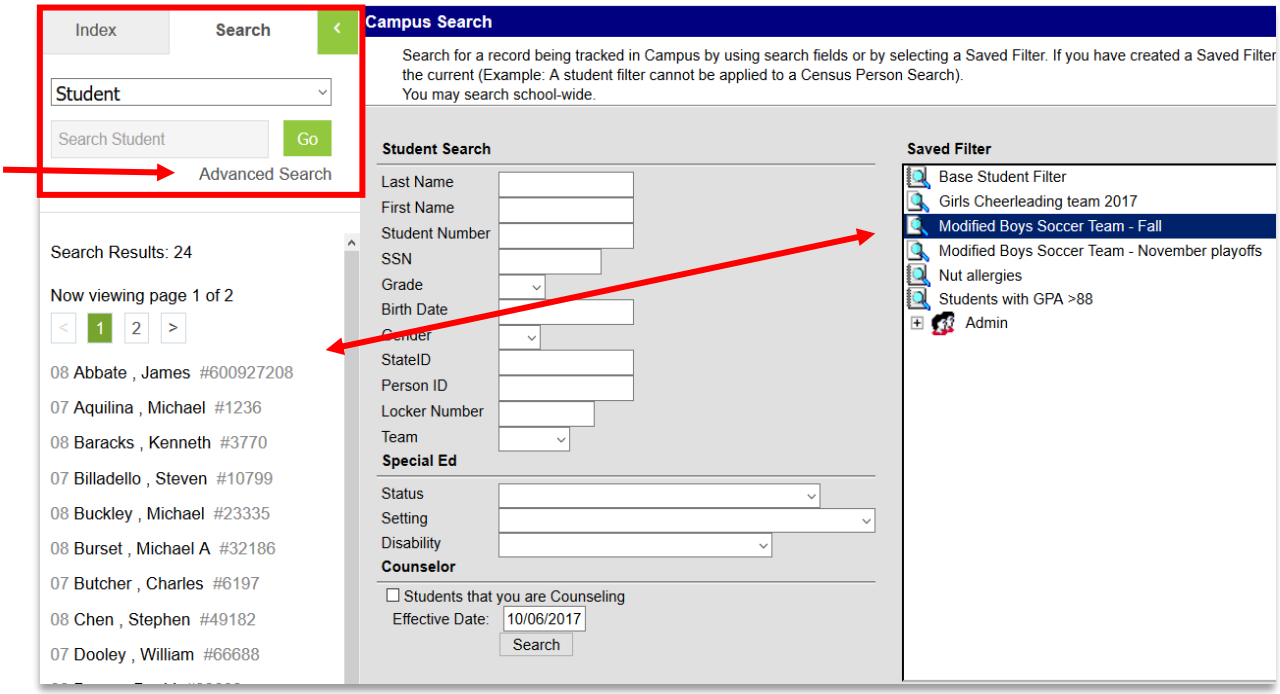
The power of filters is that they can be used on their own, as the search above, or in conjunction with many of the pre-configured reports within Infinite Campus.

1. Go to *Census* > *Reports* > *Mailing Labels*
2. Chose the <Grade/Ad Hoc> radio button.
3. In the 'Ad Hoc' dropdown list, note that *all* the Filters the user has access to – ones the user has created, as well as ones shared with the user – are available. Choose the filter created above.
4. The Enrollment Effective date defaults to today's date. This will eliminate any students on the list that are not currently enrolled in the school.
5. Click the <Generate Report> button. A PDF of the report will appear. (With this report, if a child has membership in two separate households two mailing labels will print for that student – one with each address.)
6. Close the Print Preview without printing.



Many, though not all, of the Infinite Campus reports allow users to choose a filter to limit the report output to only the students on that filter. Examine the individual reports to see which ones allow this. This is a very powerful feature. For example, a user could find the Behavior Incidents for a club, or run a Grades report only for a specific group, rather than searching individually for each student.

Filters may be accessed from the *Ad Hoc* > *Filter Designer* page, or from *Search* > *Advanced Search (as shown below):*



Filters can be used to limit or shape reports found within each module (see the USING THE FILTERS section of the manual);

Filters can also be used to create letters (See the

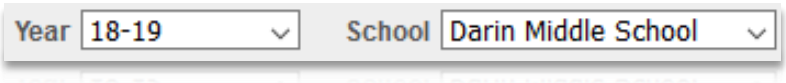
LETTER DESIGNER & LETTER BUILDER section of this manual.), with Programs, Requests, and many other items within Infinite Campus. The data the filter represents can also be Exported to another type of program (for example, Microsoft Excel, or to a web use using HTML or XML); or simply to a printed paper report.

QUERY WIZARD

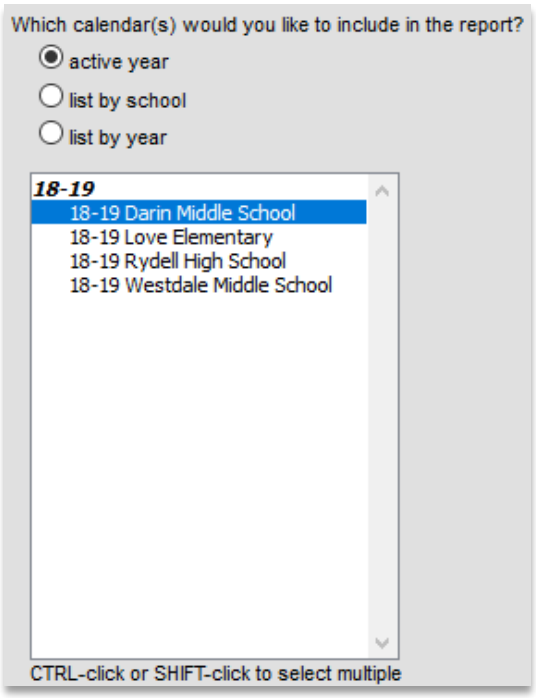
Creating a Query Wizard Filter

The Query Wizard is used to create a filter when the Infinite Campus system criteria can be used to choose the information (i.e., all the students with a peanut allergy, all the courses in the English department). Entering criteria in the pertinent fields will automatically filter (or choose) the information. Every time the filter is executed, it will return the current data in the query's fields. In addition, unlike the Selection Filter, a Query Filter will return all the fields chosen, so it can be used to create custom reports. This filter can be exported out of Infinite Campus into other programs (i.e., Excel) to be further utilized. (See the *Exporting Filters* section of the manual).

The data returned will be from the school and calendar selected in the Infinite Campus toolbar unless a calendar or calendars are chosen.



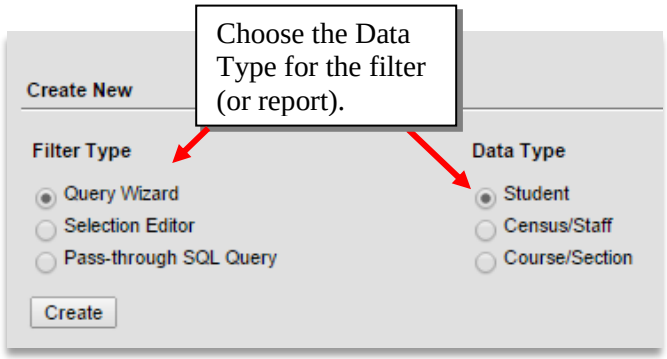
Meaning: Any Query Wizard filter can be applied to any school and calendar year. This makes the Query Wizard much more powerful than the Selection Editor. The user is able to choose which calendar, or choose multiple calendars.



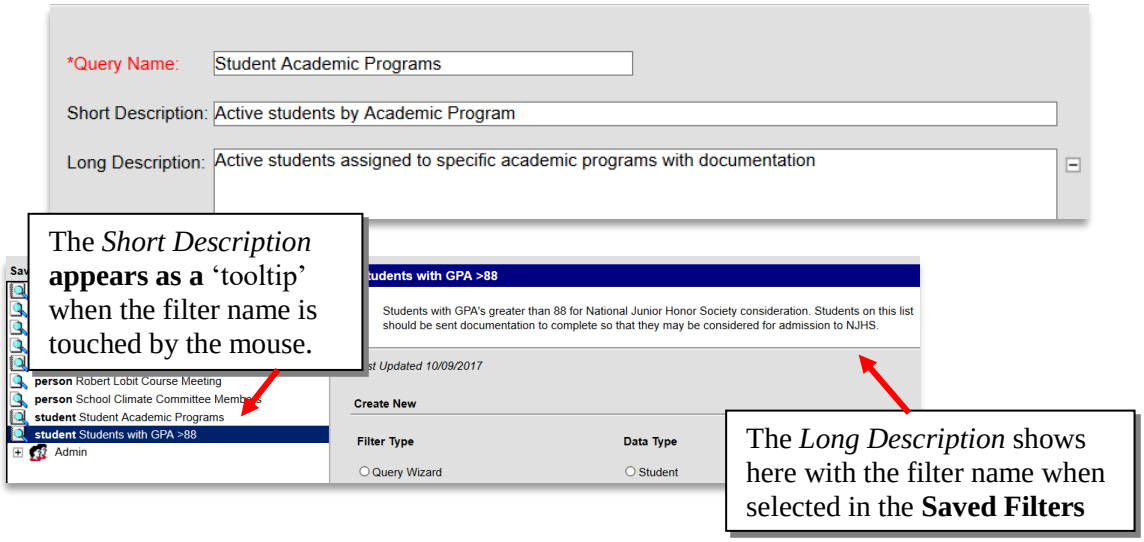
Starting a New Query Filter

1. Select the school in the Infinite Campus Toolbar.
2. Navigate to *Ad Hoc Reporting > Filter Designer*.

3. Create a New Filter by clicking on the <Query Wizard> button.
4. **Filter Data Type** – select the radio button for the type of data needed. Filters and reports can be created using Student, Census/Staff, or Course/Section information.



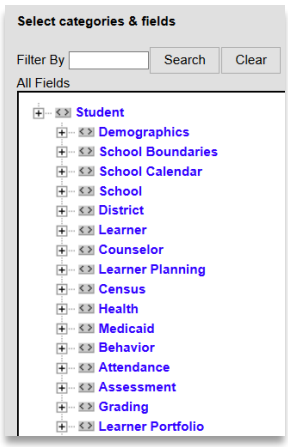
5. Click on the <Create> button to continue**.** Note that the <Create> button is unavailable until both the Filter Type and the Data Type have been selected.
6. Type the ***Query Name*** of the filter**.** To be useful later, this name should be descriptive of the data listed (i.e., Free/Reduced Lunch, Students with Unexcused Absences). A name *must* be entered before a filter can be executed.
7. Type a ***Short Description***, if desired. This will be the 'tool tip' that is seen when the mouse is moved over the filter name in the **Saved Filters** list.
8. Type a ***Long Description***, if desired. Click on the + to expand the text box. This description will display when the filter is selected from **Saved Filters** list. Click the – (minus symbol) to collapse the text box.



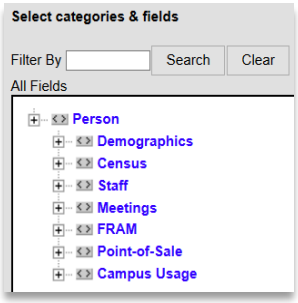
Choosing Data Fields for the Filter or Report.

Infinite Campus organizes the Ad Hoc database information into 'Views.' These consist of fields from different tables connected (joined) into definable groups. These views will be broken into Categories in the **All Fields** box. (The categories and fields shown will depend on the Filter Data Type selected, and the user's tool rights. The 'Students' Data Type will offer different field options than the 'Courses' Data Type.)

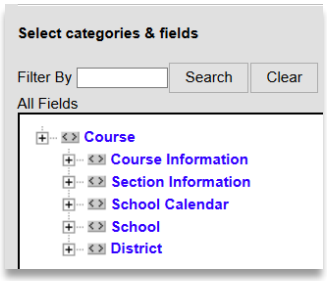
Categories & fields when using *Student Data Type*



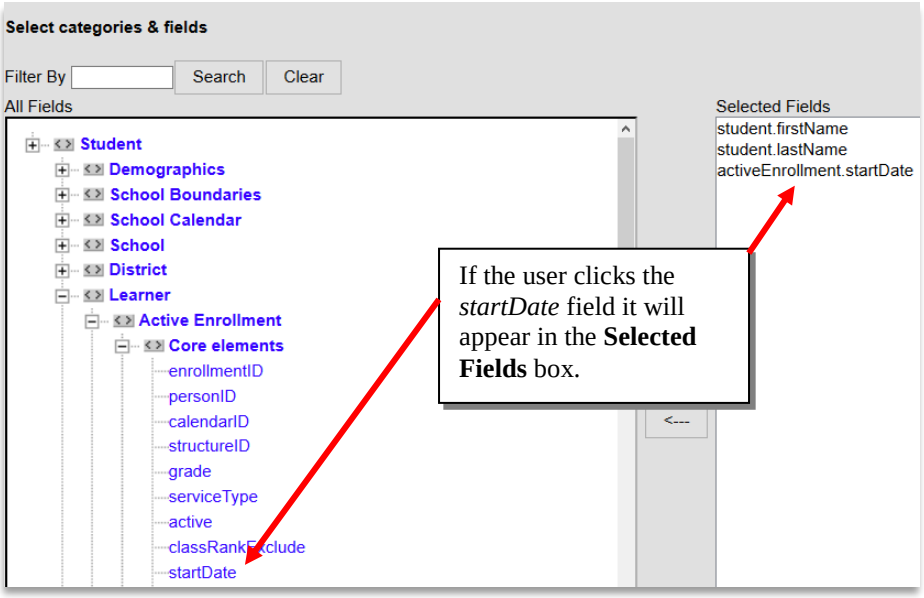
Categories and fields when using *Census/Staff Data Type*



Categories and fields when using *Courses Data Type*



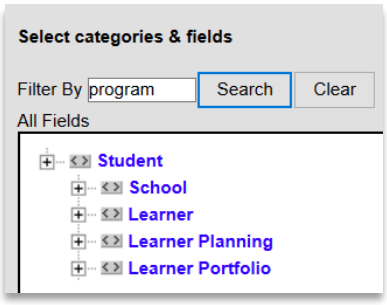
9. Click on the + next to the view name to display the fields included in that view.
10. Click the field holding the data needed in the filter**.** It will place the field in the **Selected Fields** box. (The *field* 'lastName' holds that *data*.)



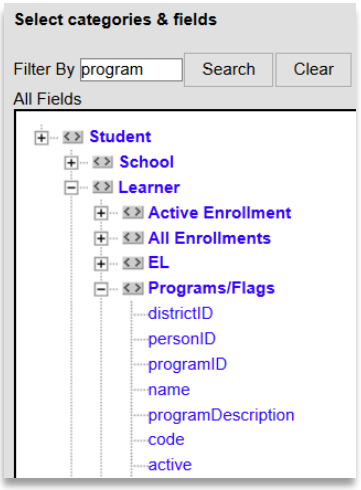
Finding Data Fields

Finding the fields that hold the data is the hardest part of using Ad Hoc effectively. The *Filter By* option offers a powerful tool to search for needed fields.

1. Using the ***Filter By*** box**:**
    a. Type the desire field name in the *Filter By* box.
    b. Click the <Search> button.
    c. The system will display all the Views that have fields with a match to the field name.

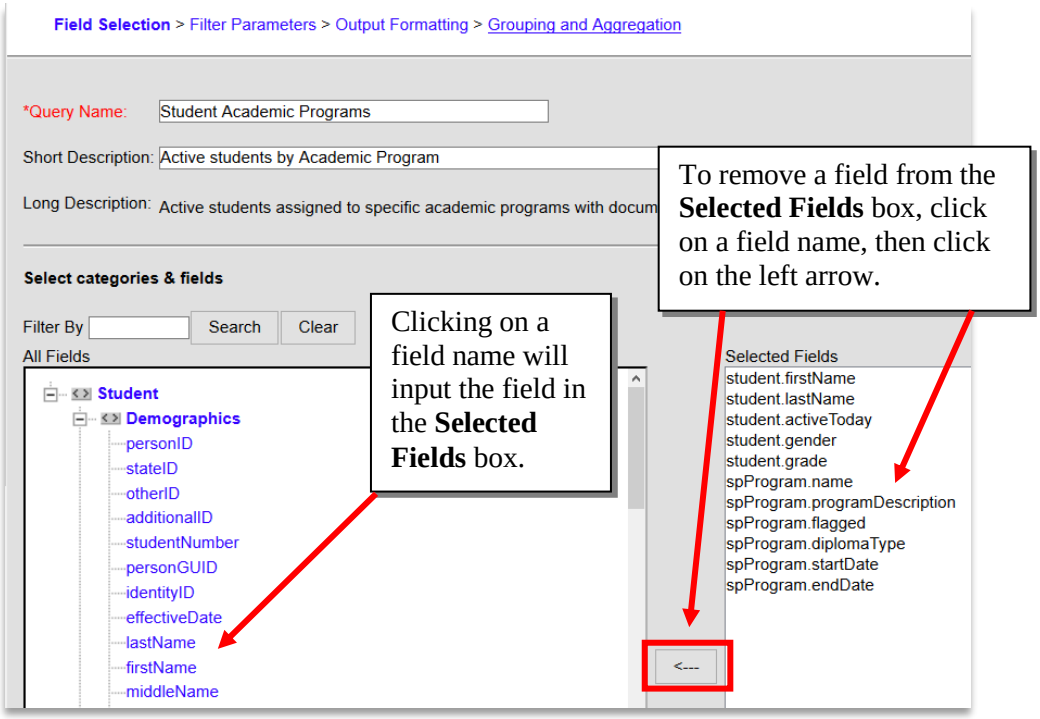


    d. Click on the + to expand the View and see the searched field.



    e. To add the field to the filter, click on the field name. It will display in the **Selected Fields** box.
    f. To clear the *Filter By* box and enter a different search (or display original Views), click on the <Clear> button and repeat steps above.

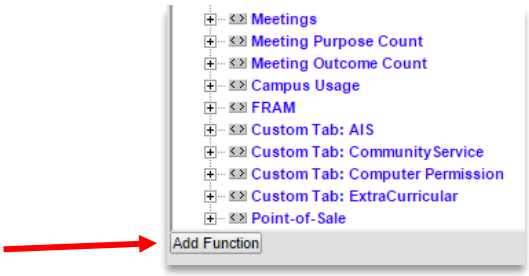
2. To remove fields from the **Selected Fields** box:
    a. Click on the field name in the **Selected Fields** box.
    b. Click on the left arrow between the boxes. The highlighted field is removed from the **Selected Fields** box.



3. Repeat steps until all of the fields need for the Filter have been added.
    a. Select the fields that hold the data required.
    b. A filter may also need data to allow criteria to be limited in the filter or report: to a specific grade level, school or year, course or assessment.
    c. Since this filter will also be used to create a report, be certain to have collected any fields needed to display on the report.

Insert Functions

In addition to selecting fields, functions can be added to a filter, which allows logic to be applied to the field columns.



1. Navigate to *Ad Hoc Reporting > Filter Designer*.
2. Click the <Add Function> button below the data fields. The Function Editor will appear.
3. *Name* the function. This will be the header for the field column.

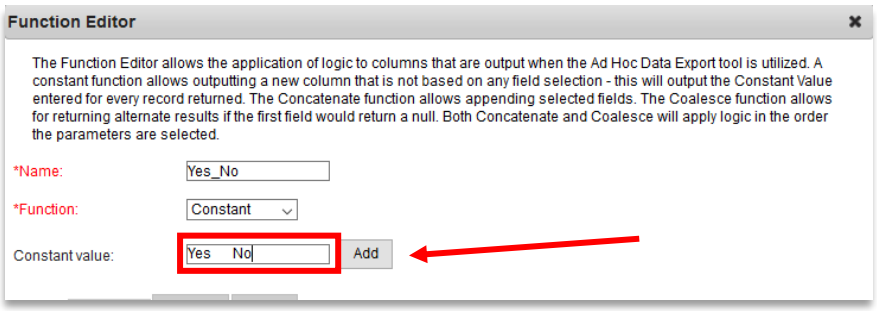
4. *Select the function* from the dropdown list.

   a. **Constant**: allows outputting a new column that is not based on any field selection. This will output a constant value entered for every record (i.e., a "yes/no" field on a permission slip check off list for a trip.)

      i. Select 'Constant' from the 'Function' drop down.

      ii. Enter "Yes No" the *Constant Value* field.

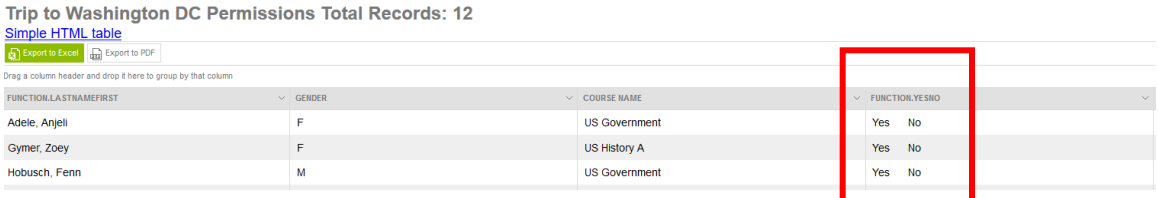
      iii. Click <Add>.



      iv. The *Constant Value* added will appear in the Parameters box.

      v. Click <Save> to save function.

      vi. Click <Save & Test> to view results in a separate window.

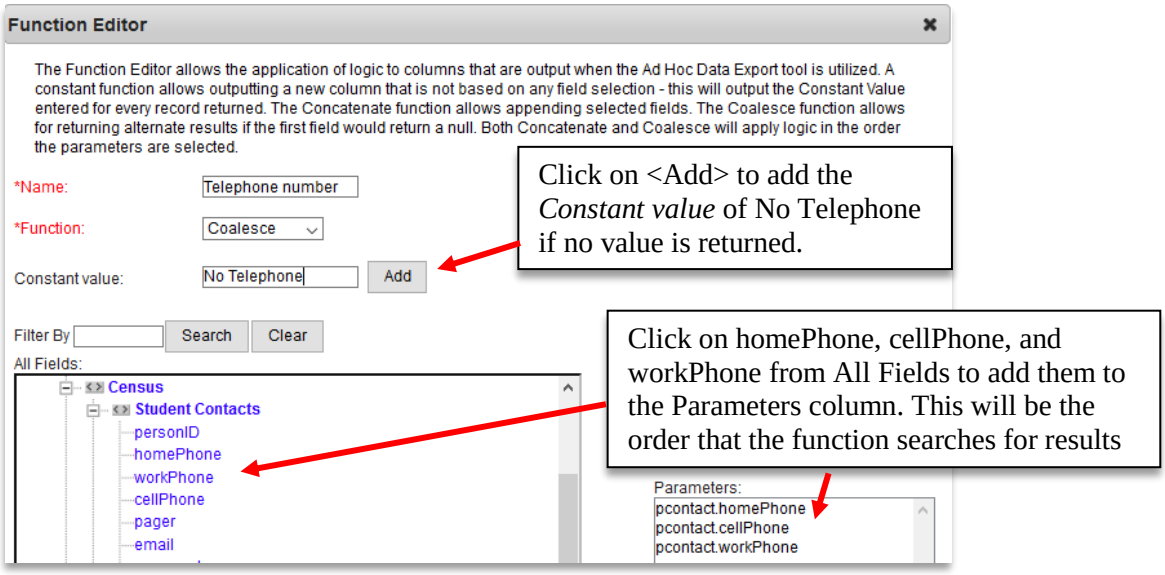


   b. **Coalesce:** allows for returning alternate results if the first field would return a null (i.e., If the home phone number field is null, look at the cell phone number, then work number.) Coalesce applies logic in the order of the parameters selected.

      i. Name the function *Telephone number*. The User would like a list of telephone contacts for the students on the Washington DC trip.

ii. Select 'Coalesce' from the 'Function' dropdown list.

iii. Add *No Telephone* to the Constant value field.



iv. Click <Save> to save function.

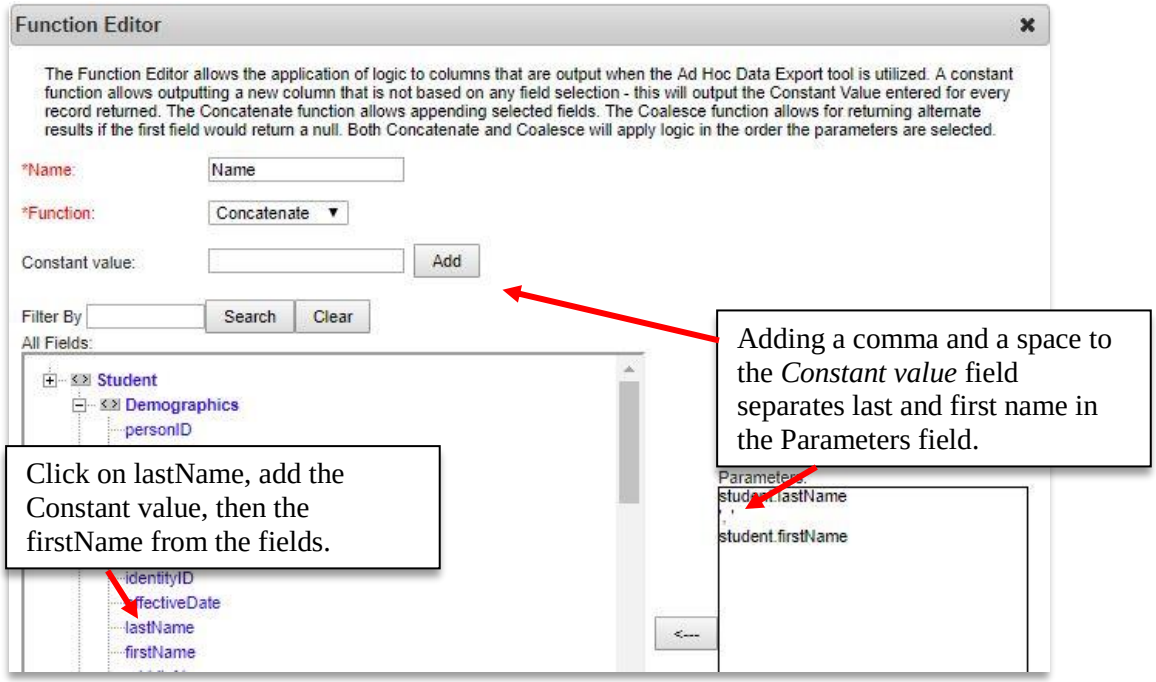
v. Click <Save & Test> to view results in a separate window.

c. **Concatenate**: appends selected fields (i.e., rather than a column for first name and a column for last name, concatenate the fields to have the first name and last name in one column). Concatenate applies logic in the order of the parameters selected.

i. Name the function *Name*.

ii. Select 'Concatenate' from the 'Function' dropdown list.

iii. Add *(comma space)* to the *Constant value* field to separate last and first names.



iv. Click <Save> to save function.

v. Click <Save & Test> to view results in a separate window.

FUNCTION.NAME	STUDENT.GENDER	STUDENT.BIRTHDATE	STUDENT.GRADE
Jetson, Elroy	M	01/01/2014	10
Jetson, Judy	F	01/01/2013	11
Rubble, Bam Bam	M	01/01/2013	11
Smurf, Baby	F	01/01/2002	12

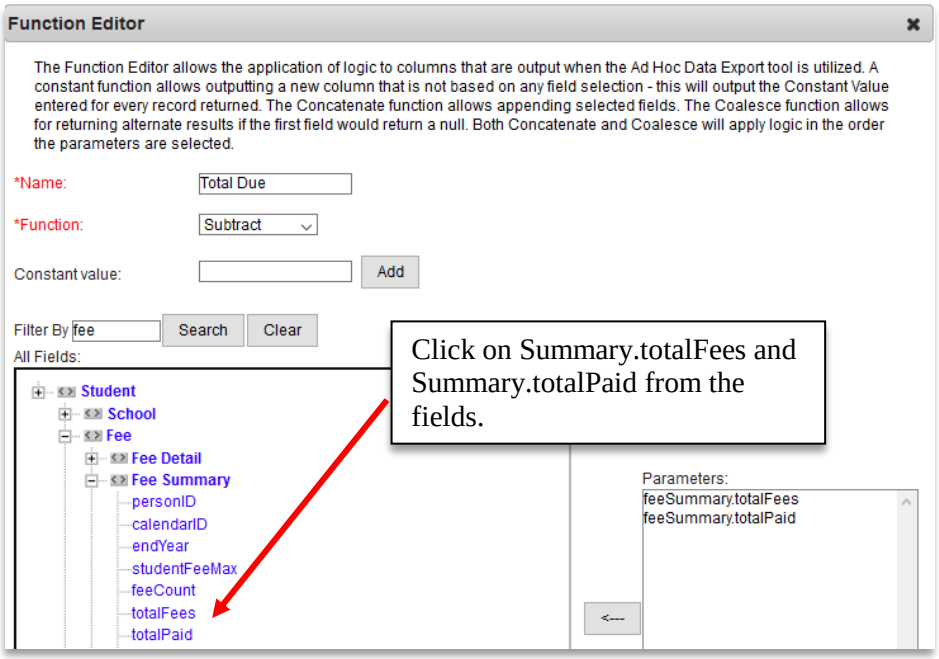
d. Mathematical Functions (**Add, Subtract, Multiply, Divide**): These functions can be performed on numerical fields and are generally used with fees.

i. Name the function *Total Due*. The Field Trip to Washington DC costs $650, but some students have already paid for a portion of the trip.

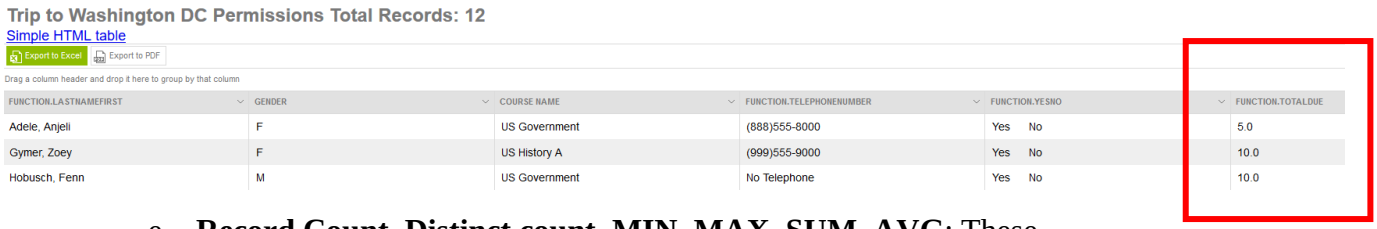
ii. Select 'Subtract' from the 'Function' dropdown list.

iii. Select Summary.totalFees and Summary.totalPaid for the Parameters. Note the order of fields in the parameters column.

iv. Click on <Save> to save the function.



v. Click on <Save & Test> to view the results in a separate window.



e. **Record Count, Distinct count, MIN, MAX, SUM, AVG**: These functions can be used to determine minimum, maximum, sum, and average counts as well as record and distinct counts in fields (i.e., class size)

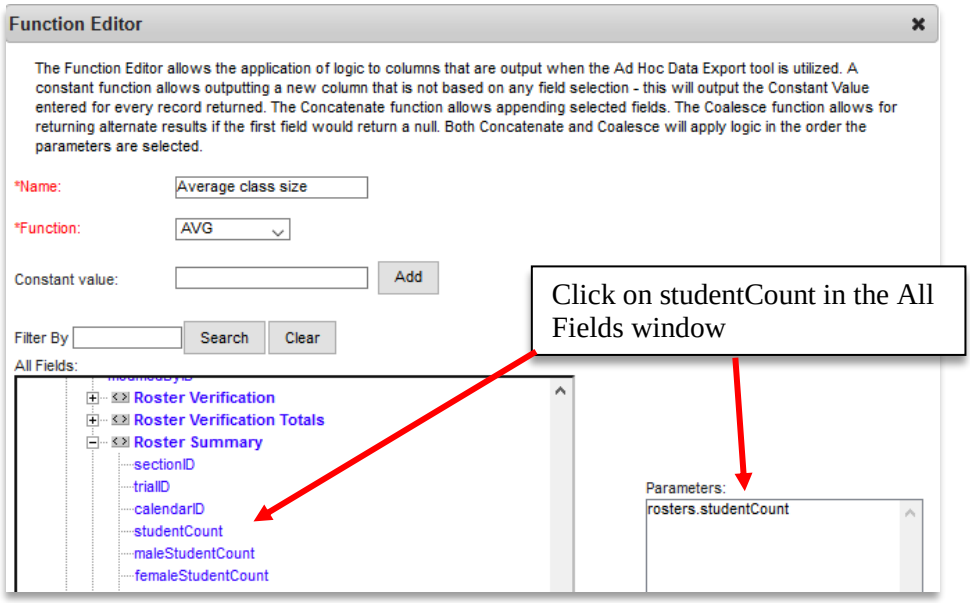
i. Name the function *Average*. The user would like to know the average number of students in each course.

ii. Select 'AVG' from the 'Function' dropdown list.

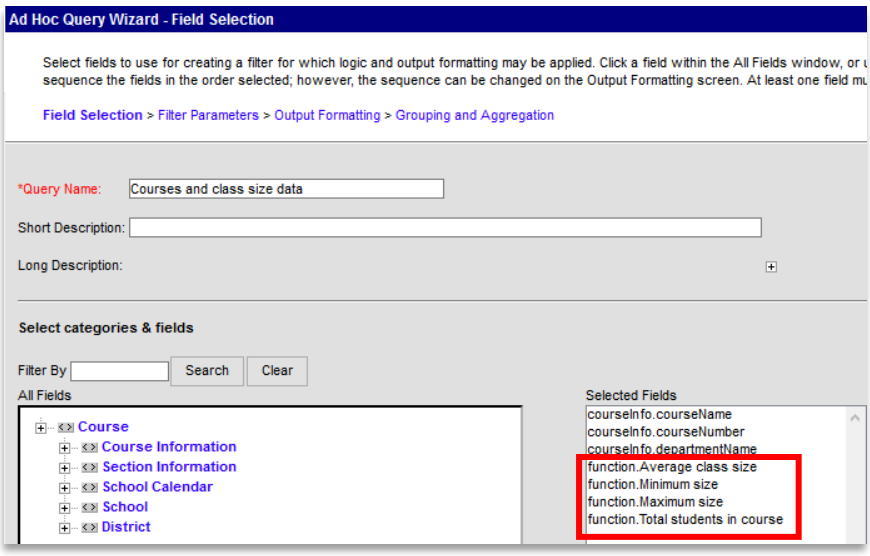
iii. Select rosters.studentCount from All Fields so that it appears in the parameters column.

iv. Click on <Save>.

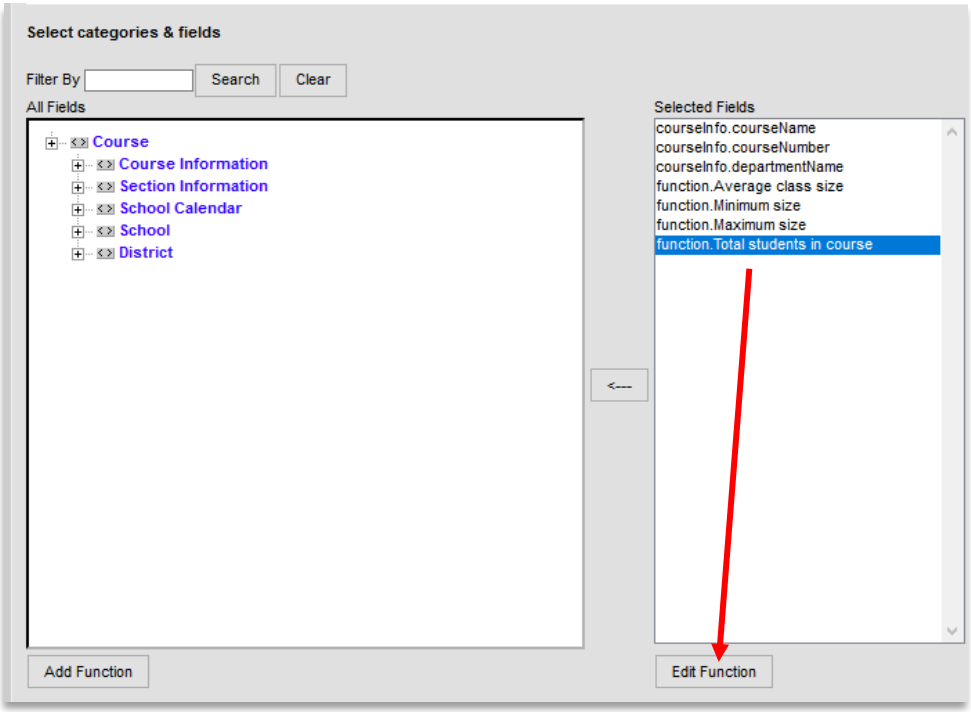
v. Click on <Save & Test> to view the results.



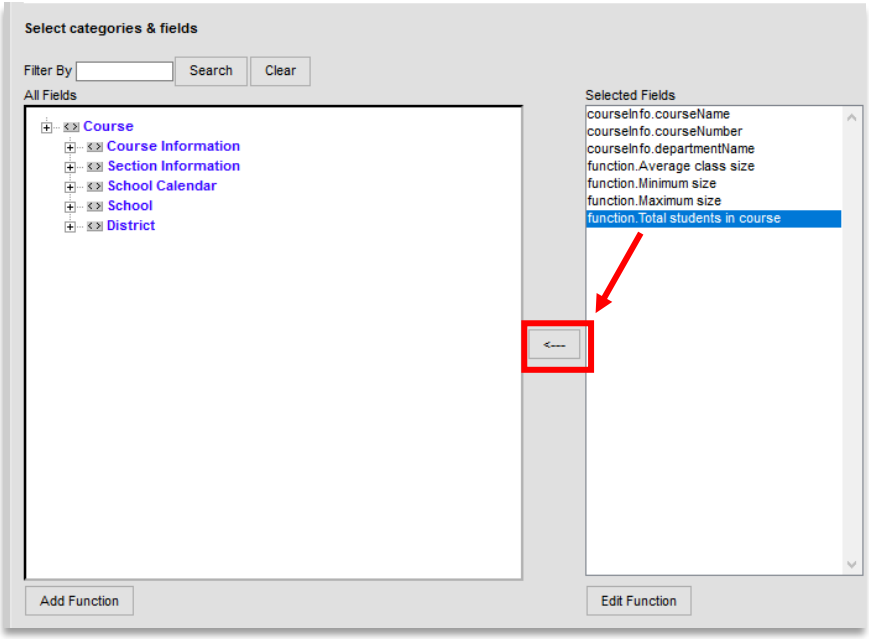
5. Add additional functions as necessary. Saved functions will appear in the Selected Fields column of the Field Selection screen.



6. Functions can be edited by clicking on the function in the Selected Fields column and selecting the <Edit Function>. Users will be redirected to the Function Editor screen to make changes.



7. Functions can be removed from the query by clicking on the function in the Selected Fields column of the Function Editor and clicking on the left arrow. Click <Save> to save the edited query.



8. Once all of the fields that are required have been selected, continue to create the filter by clicking the <Next> button at the bottom of the page. This will take the user to the page where criteria and operators for the filter can be selected (see the

9. Adding Criteria to an Ad Hoc Filter section of the manual).

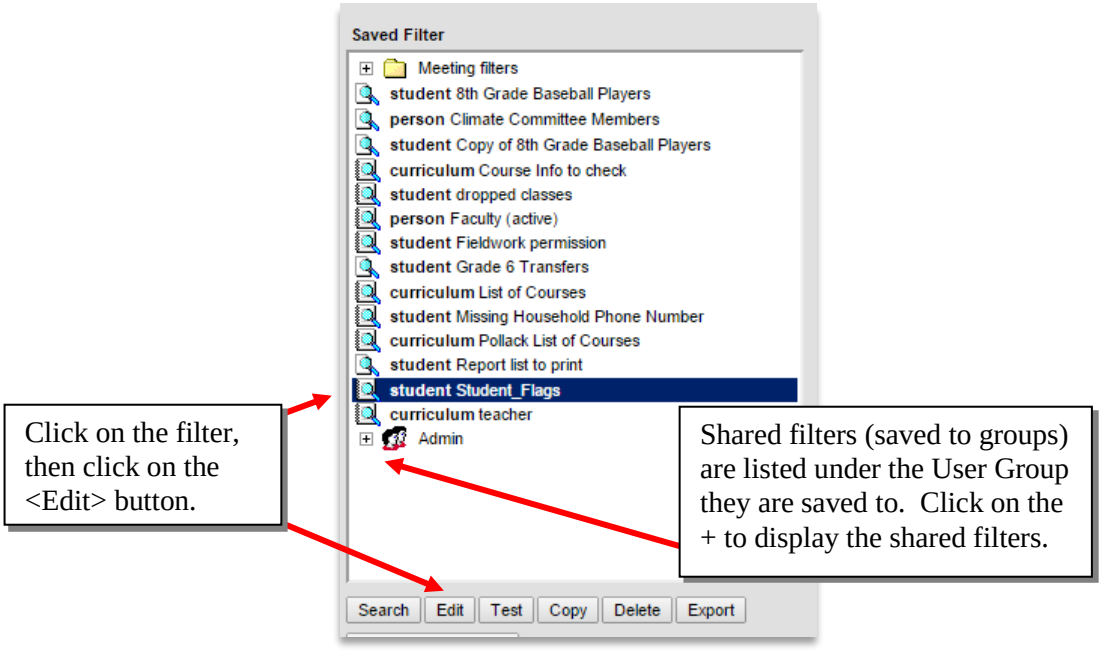
Saving a Query Filter

A user can save filters to use or edit later. Infinite Campus allows users to save filters to their User Account for private use, or to share filters with co-workers by saving to a User Group to ensure all members of the group are using the same information criteria.

1. Set the Pop-up Blocker to 'Always allow pop-ups from this site' as 'test. Reports will display as pop-ups.
2. Clicking the <Save> button will save the filter with the name the user gave it.
3. Saving changes to a filter will overwrite the previous version, even if the name of the filter is changed first.
4. To see the results of a query, click on the <Save & Test> button (this function will both save the filter and run a test).

Edit the Query Wizard Filter

1. Navigate to *Ad Hoc Reporting > Filter Designer*.
2. In the **Saved Filters** box, click on a filter to edit. Filters saved to a group will display under the group name. Click on the + next to the group will display shared filters.
3. Click on the <Edit> button.

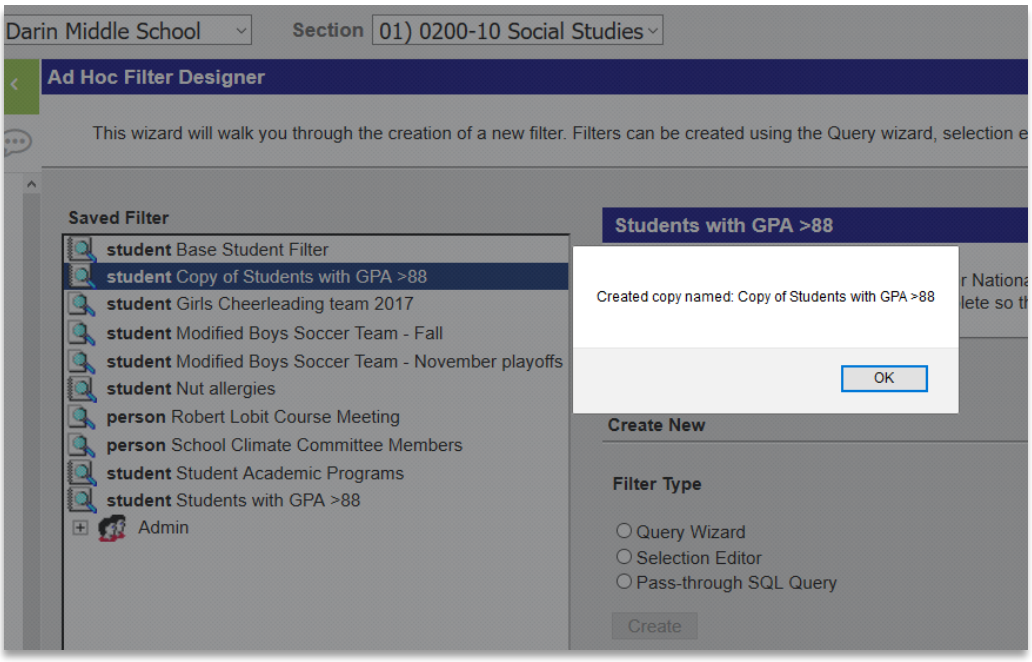


4. The filter will display. Edit the filter by adding or deleting fields and changing the filters (refer to ***Choosing Data Fields for the Filter or Report***.)
5. Click on the <Save> or <Save & Test> button.

Copy the Query Wizard Filter

Filters can be copied for a variety of reasons. If two filters are needed that are similar, a copy can be made and then edited to reflect the different information needed. In addition, filters can be copied so a user can keep the filter in their 'User Account' and then copy it to share with others (ensuring that their original filter will not be edited by other users).

1. Navigate to *Ad Hoc Reporting > Filter Designer*.
2. In the **Saved Filters** box, click on the filter to copy. Any filter saved to a group will display under the group name – click on the + next to the group to display all the shared filters.
3. Click on the <Copy> button.
4. A notice will display that the filter has been copied. Click on the <OK> button.



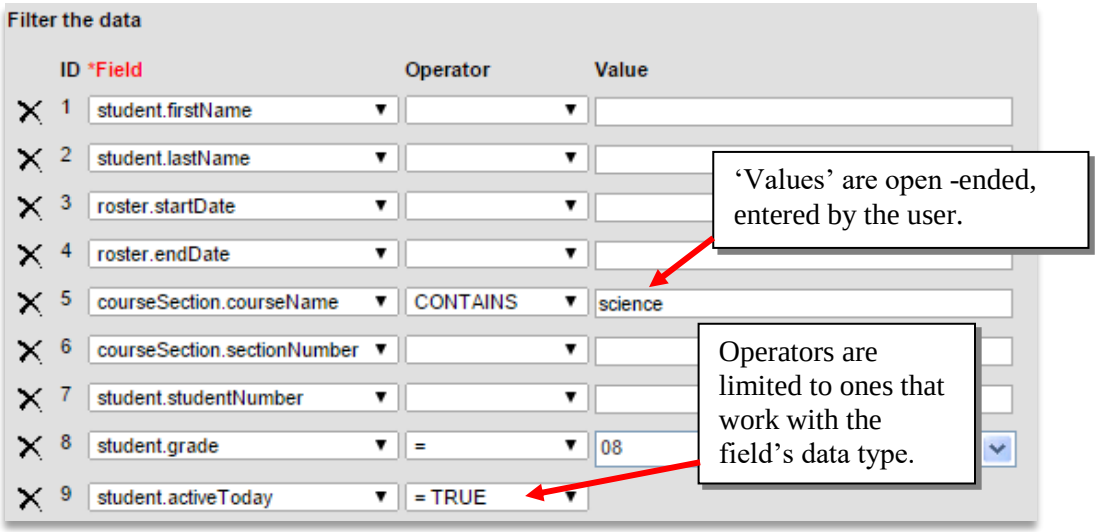
5. Click on the copied filter, then click on the <Edit> button to make any changes needed (i.e., new name, change filter, share with other users).

Special Note:
Users wishing to share a filter should first save it to their user account, and then use the copy feature to save it with a new name to a User Group. Anyone in a User Group can change or delete filters within the Group. Filters can be lost!

Adding Criteria to an Ad Hoc Filter

Set the 'Operators' and *Values* of the filter to get only the specific information needed.

To continue, be certain the **Filter the data** screen is visible (an example is shown below.)



On this screen, criteria are added to the filter. Use *Operators* to define how to compare the data in the tables to the *Values* identified here.

To compare data to values, a user needs know which data types are being pulled from Infinite Campus. To see the data currently used in the filter, use the <Save & Test> button to run the filter. It is strongly suggested that this is done *before* adding *anything* to the criteria.

> **Special Note:**
> Be certain to have a NAME in the *Query Name* field or the system cannot save the filter. If the popup blocker resets the system and the filter was not saved first, the filter will have to be rebuilt!

If the filter was successful, look closely at the data returned to understand the format needed to compare the values of the data. Be knowledgeable of the data types.

Birthdate (and any date in Infinite Campus) is in the form of MM/DD/YYYY; If using a date, there are date-based operators available.

Grade in Infinite Campus is a text field, so '7' or '07' are not the same. Text will sort differently than numbers so that 1 is followed by 10, 11, 12 to 19, etc. before finding 2, then 21, 22, 23, etc.

Gender: To look for all of the boys in a school, criteria would need to match 'M' (not 'Male,' and not 'Boys' or 'B')!

Active Today: Look how the system returns data for the a*ctiveToday* field. The answers are either 1 or 0. This is an example of a Logical data field, meaning the data has only two possible answers, as in it either 'is' or it 'isn't'.) It is also known as a 'True/False' or 'Yes/No' question. If the answer is 'True' the field has a '1', and 'False' returns '0'.

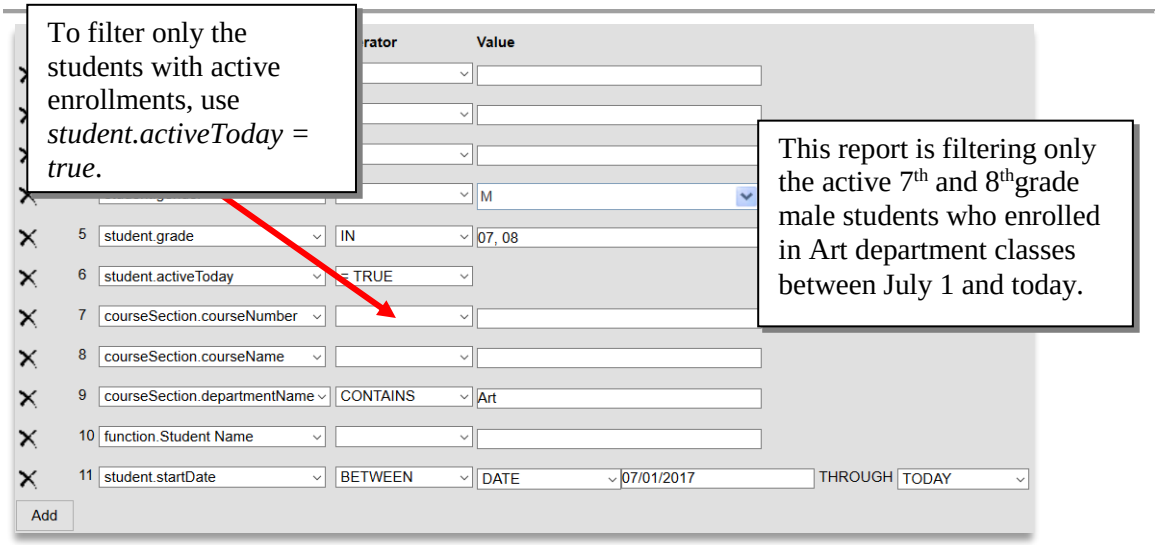
Special Note:
It is also important to understand that a field with a 'zero' in it is NOT an empty field. An empty field returns no data. Empty fields are also called NULL fields.

1. To filter using a field, click on the dropdown button to choose the O*perator*. Enter the filter data in the *Value* field. The system will only display the operator allowed in each field (i.e., students with assigned grade levels will not display if *student.grade IS NULL*).
2. **Comparison Operators – math symbols**: Although mathematical symbols are used, the symbols match the data versus the value chosen. These symbols work with Text, Integers and Date fields. Operators include:
    - **Equal (=)** results in an exact match of value entered (i.e., *gender = M* - will display all the males)
    - **Unequal (< >)** results are not equal to the value entered (i.e., *grade <> 07* - will display all students not in 7th grade)
    - **Greater than (>)** returns values greater than the one entered (i.e., *student.age > 17* - will display all students older than 17)
    - **Greater than or equal to (>=)** returns values greater than the one entered (i.e., *student.age >= 18* - will display all students 18 or older)
    - **Less than (<)** returns values less than the one entered (i.e., *student.age < 12* - will display all students under 12 years of age)
    - **Less than or equal to (<=)** returns values less than or equal to the one entered (i.e., *student.age <= 12* - will display all students 12 years of age or less)
    - **IN/NOT IN** allows for a number of non-sequential data to be gathered. (i.e., *grade IN 01,03* - will display all students who are in the 1st or 3rd grade, *grade NOT IN 01,03* - will display all students who are **not** in the 1st or 3rd grade). Values must be separated with a comma but no spaces.
    - **BETWEEN** resets the value area to allow placement of a two **inclusive** amounts to test the data.
    - **IS NULL/IS NOT NULL** allows the user to look for fields that are blank or not blank (i.e., *birthdate IS NULL* - will display all students who do not have a birthdate entered.) **When using IS NULL or IS NOT NULL, the user cannot input data in the value area**.

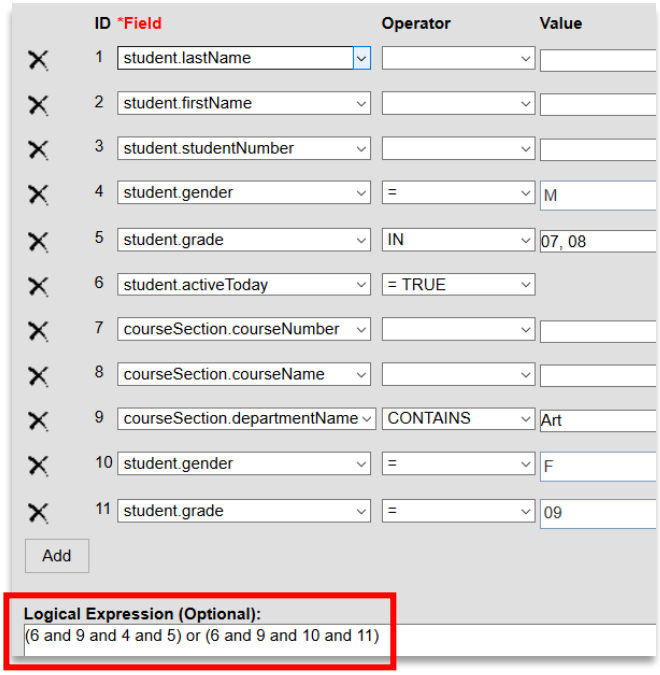
Special Note:
Not all operators are available on all data types.
Text fields allow the use of comparison of values using LIKE and NOT LIKE, SOUNDS LIKE, CONTAINS, and ENDS WITH.
Date fields offer added operators to test what month is contained in a date by using IN THE MONTH OF and a value. Dates also IS TODAY, IS YESTERDAY, or IS TOMORROW to designate a value to test data against a current date.
Integers do not allow use of the LIKE types of operators.

3. Comparison Operators – using LIKE operators:
    - **LIKE allows the user to enter wildcards:**
        - **%** does not need to be entered if needed both before and after the pertinent word (i.e., *healthCondition.userWarning LIKE %nut%*). The system will assume both wildcards if '*LIKE*' is used without a wildcard (i.e., *healthCondition.userWarning LIKE nut* - will display all students who have a program user warning that has the word 'nut' in it – for example 'allergic to peanuts, 'peanut allergy', 'nuts').
        - **_ (underscore)** - used as a single character wildcard, this is used to put a wildcard for one or more characters (i.e.,
        - **[ ] (token)** – used to allow a range of possible characters (i.e., *Lastname LIKE L[ae]%* - will display all students whose last name starts with la or le).
        - *Lastname LIKE sm_th* - will display all students whose last name is 'smith', 'smyth', 'smath', etc.). It can be used multiple times as well (i.e., *Lastname LIKE smi_ _* will display all the students whose last name is smiaa, smiab, etc).
        - **[^] (negative token)** – the opposite of token (i.e., *Lastname LIKE L[^ae]%* - will display all students whose last name does **not** start with la or le).

Special Note:
The values are not case sensitive, but to use a Wildcard, the 'Like' operator *must* be used.



4. Entering a Logical Expression is optional. This field allows the user to incorporate OR, AND, and NOT conditions between fields within a filter. The example below returns a list of active 7th and 8th grade male students enrolled in art classes and active 9th grade female students enrolled in art classes.



5. Click <Save & Test> to review output, then click the <Next> Button.

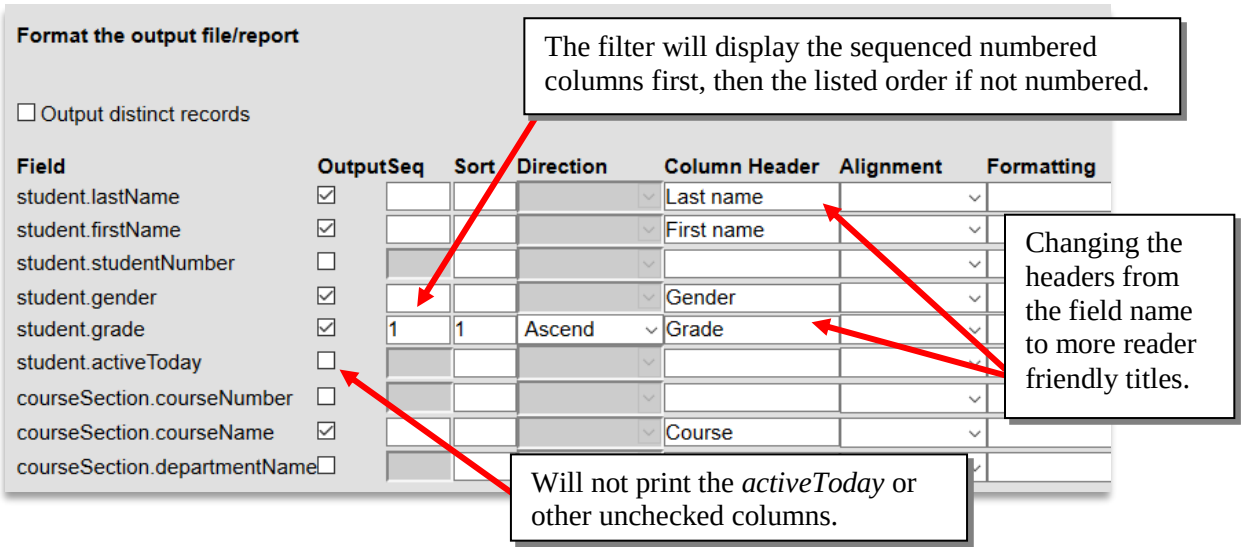
Special Note:

Only fields assigned an operator can be included in logical expressions

Setting Order and Output Values for Ad Hoc Filter

The order in which the data fields are displayed may be important to the user. Additionally, the user may wish to confine the output, such gathering data on students who are currently enrolled, but not displaying enrollment status field on the report. The user may also want the report data based on the highest ranked value rather than alphabetical reporting, as in the case of class rank lists. To achieve this, the user can use the **Output Formatting** screen.

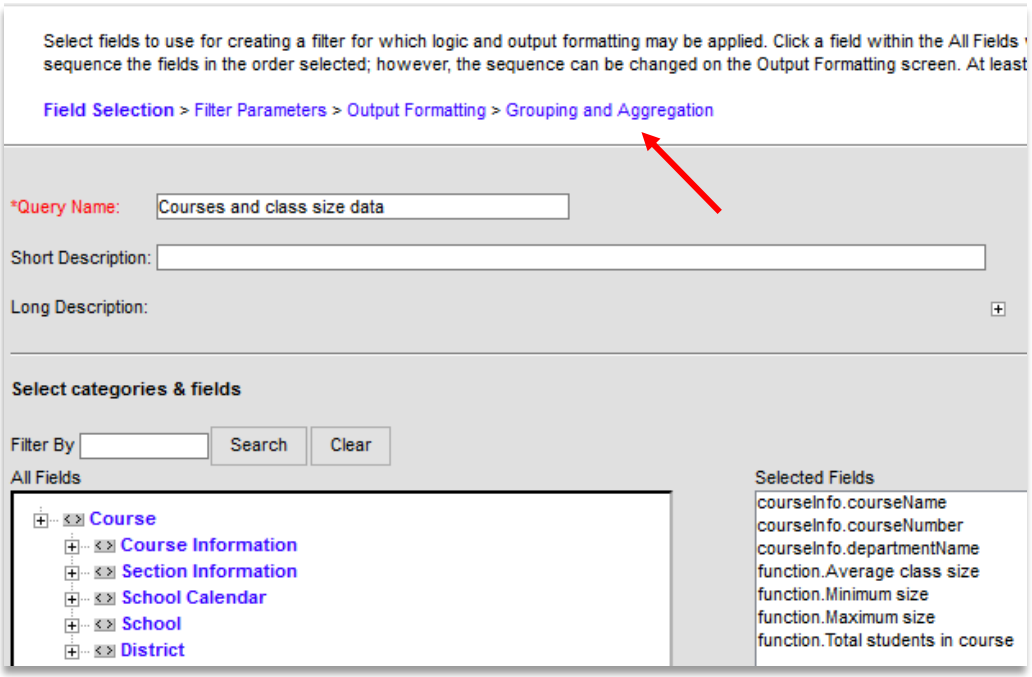
1. **Format the output file/report** – the report can be changed in several ways:
    a. **Output** – The system will automatically print all fields selected on the report. Uncheck the box for any field not needed on the report. For example, the *student.activeToday* field is only needed to filter the active students. It is not needed to print on the report. This box can be unchecked.
    b. **Seq** – The report will print the fields in the order they were entered (top to bottom on the screen will print left to right on the report). The fields for the report can be re-sequenced here, if needed. Type in the number (from 1-99999999) to re-sequence the report.
    c. **Sort** – Each report has a default sort order (i.e., student reports will automatically sort by last name). Type in the number (from 1-9999999999) to re-sort the report. The report can be sorted using any (or all) the fields including fields not printing although that is not recommended.
    d. **Direction** – For any of the sort fields, choose the direction needed. Ascend will sort in alpha/numeric order (i.e., A-Z, 1-999) and Descend will sort in reverse alpha/numeric order (i.e., Z-A, 999-1)



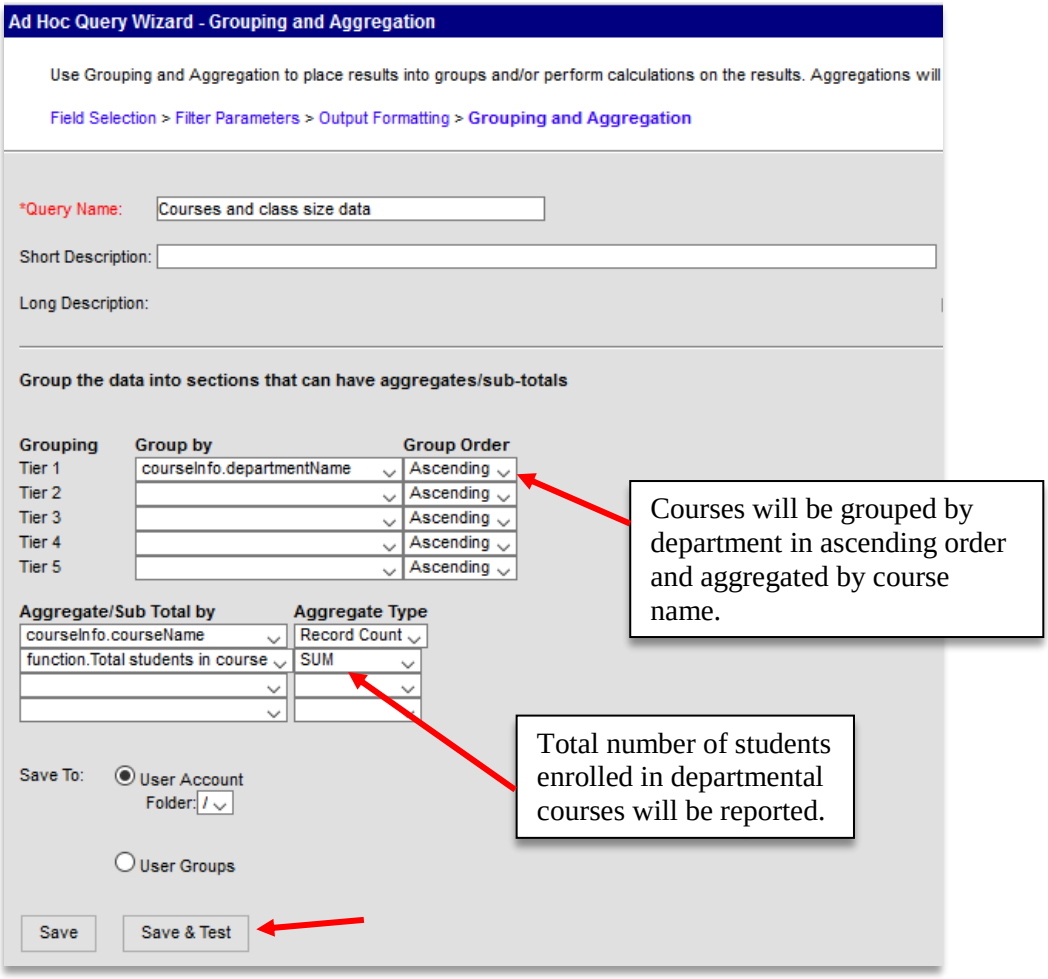
Grouping and Aggregation

Data can also be grouped and specific aggregates/subtotals can be calculated for each grouping.

1. Navigate to *Ad Hoc Reporting > Filter Designer*.
2. Create a new filter adding appropriate fields, functions, and operators OR click on a filter in the Saved Filter box, to edit.
3. Click on <Grouping and Aggregation> at the top of the in the main Field Selection screen OR click on <Next> at the bottom of the screen.



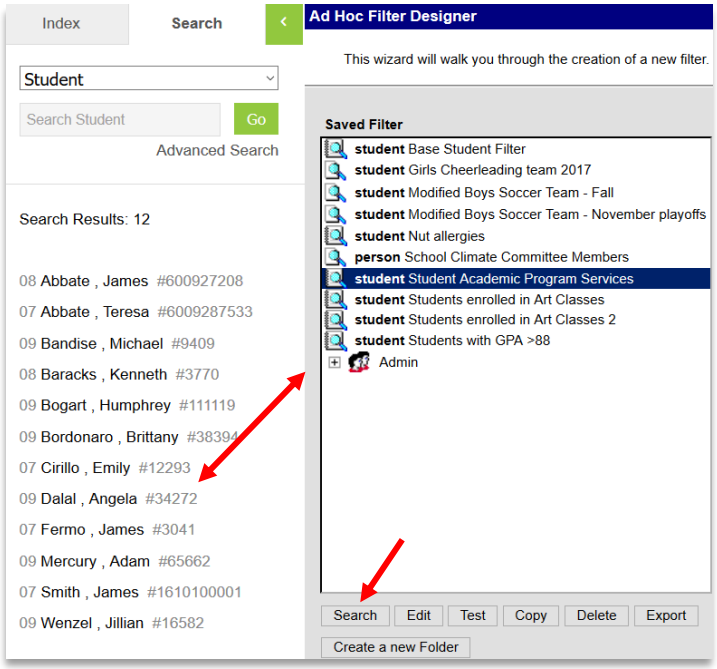
4. Select each field to include in each tier in the 'Group By' dropdown list to determine which fields will be grouped into sections and allow the field to have subtotals reported.
5. Determine how aggregate/sub-total data should be reported by selecting ascending or descending in the 'Group Order' dropdown.
6. Select how the data fields selected should be aggregated/subtotaled from the 'Aggregate Type' dropdown list.
    a. **Record Count** is the number of records for the field selected.
    b. **Distinct Count** is the number of distinct record types for the field selected.
    c. **MIN, MAX, AVG,** and **SUM** allow the user to report the minimum value, maximum value, average value, or sum of the values for the field.



7. Click <Save & Test> to view results. The results will be in HTML format and may not be further sorted on the test page.

Search Using the Query Wizard Filter

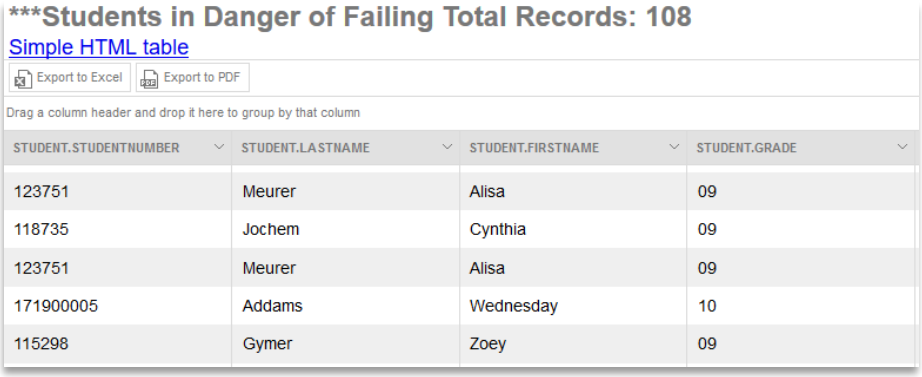
1. Navigate to *Ad Hoc Reporting > Filter Designer*.
2. In the **Saved Filters** box, click on the desired filter. Any filter saved to a group will display under the group name – click on the + next to the group to display all the shared filters.
3. Click on the <Search> button. The information included in the filter will display in the **Search Results** box in the outline.



Delete a Query Wizard filter

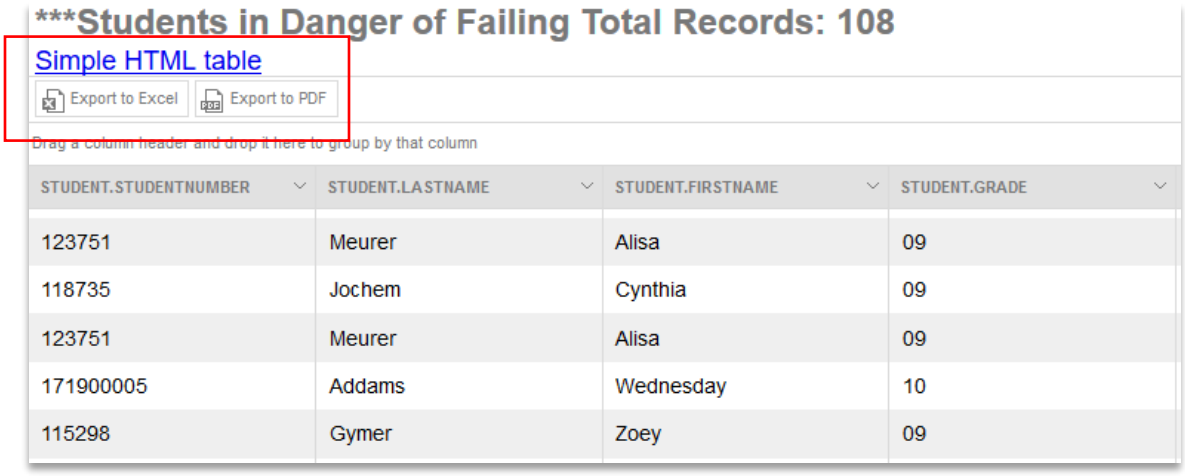
1. Navigate to *Ad Hoc Reporting > Filter Designer*.
2. In the Saved Filters box, click on the filter to delete. Any filter saved to a group will display under the group name – click on the + next to the group to display all the shared filters.
3. Click on the <Delete> button.
4. A warning will display. Click on the <OK> button to delete the filter.

Query Wizard Output

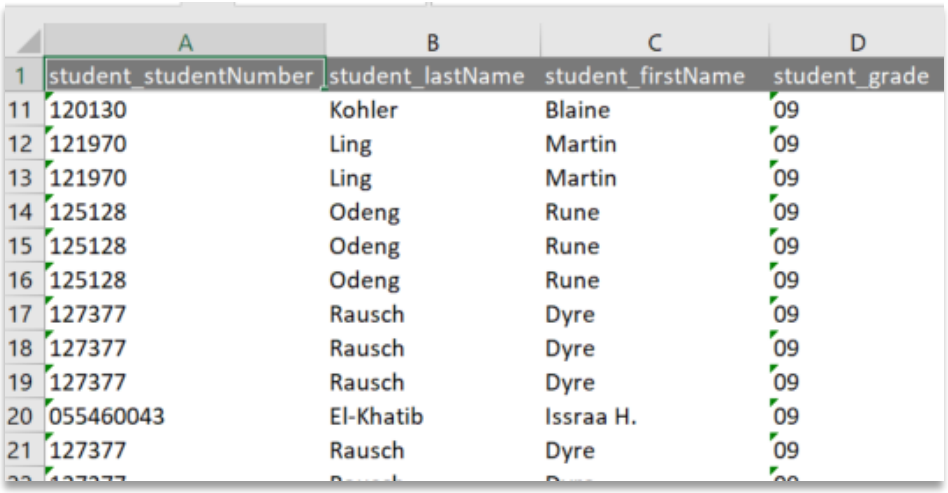


Users can manipulate and export Ad Hoc Query Wizard output in a multitude of ways, as well as continue to utilize the options within the Ad Hoc module (such as Data Export, etc.)

Exporting

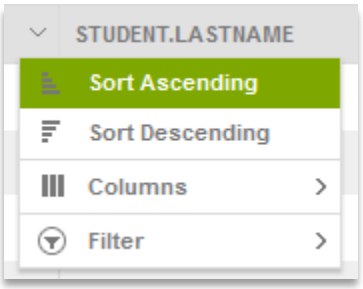


Export to Excel or to PDF directly from the output.

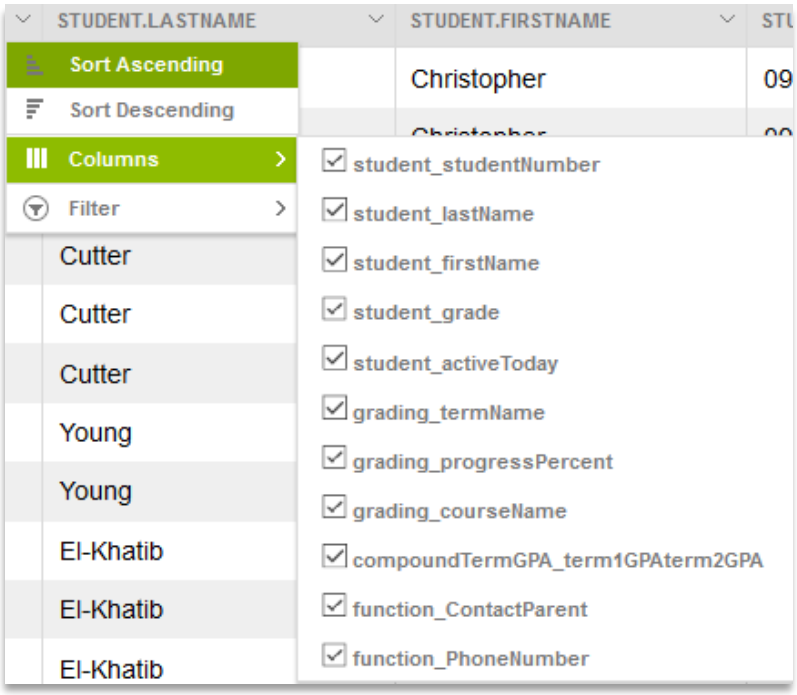


	A	B	C	D
1	student_studentNumber	student_lastName	student_firstName	student_grade
11	120130	Kohler	Blaine	09
12	121970	Ling	Martin	09
13	121970	Ling	Martin	09
14	125128	Odeng	Rune	09
15	125128	Odeng	Rune	09
16	125128	Odeng	Rune	09
17	127377	Rausch	Dyre	09
18	127377	Rausch	Dyre	09
19	127377	Rausch	Dyre	09
20	055460043	El-Khatib	Issraa H.	09
21	127377	Rausch	Dyre	09

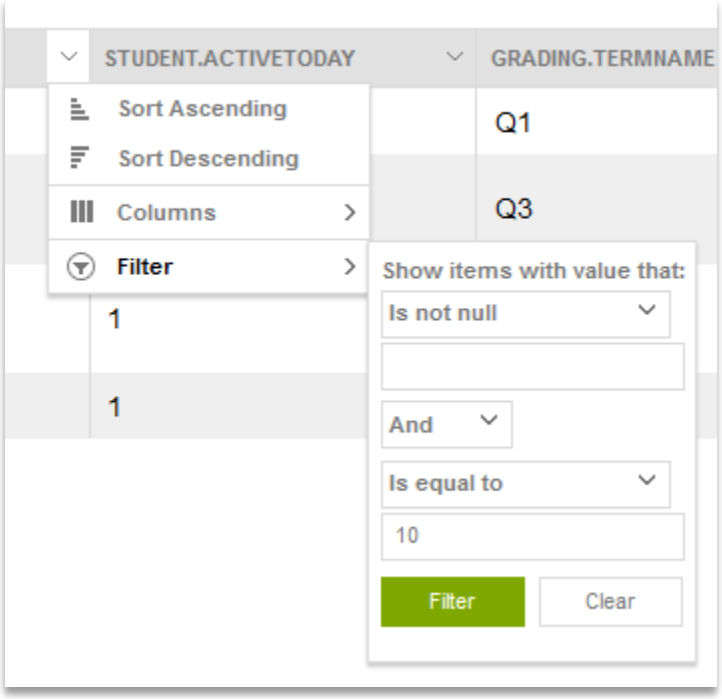
Sort the output ascending or descending:



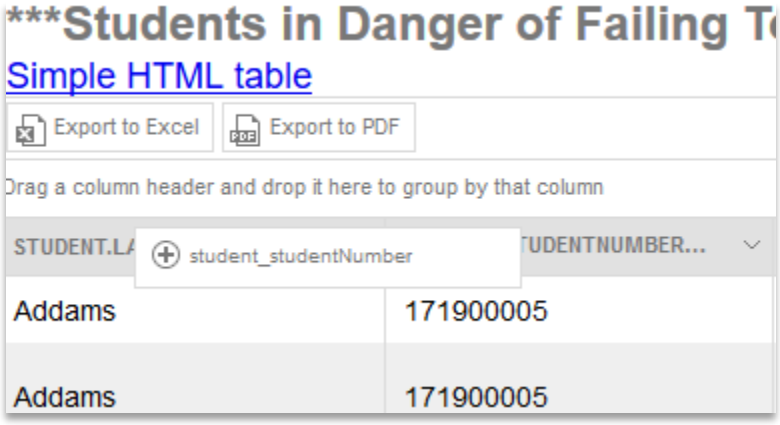
Remove viewing the output of the columns included:



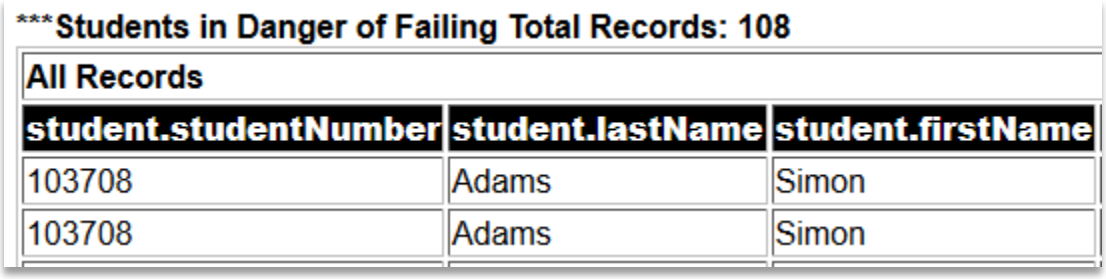
The user may filter the data directly from the output report:



It is also possible to re-order your columns without sequencing by utilizing a "drag and drop":



If the user prefers a "Simple HTML Table", click the link in the output report:



Special Note:

Users may still utilize all previous options for building of Ad Hocs and output options.

PASS-THROUGH SQL QUERY

Description

Users can return data by using a pass-through SQL query. A pass-through query uses SQL language to gather information. Pass-through queries allow users to search data using SQL functions. (A basic understanding of SQL and knowledge of Campus data schema is helpful in using SQL Queries.)

Unless 'All Schools' is selected in the Campus Toolbar, only students and course information from the selected calendar will be displayed in the query. Census/staff information is not calendar-dependent.

Creating a Pass-Through Query

Once created and saved, a pass-through query can be used to generate reports. As SQL queries may be difficult for users not versed in SQL language, sample pass-through queries using SQL language are available for users in the Campus Community for copying and pasting.

- For **Census/Staff** queries, see Documentation for Census/Staff SQL Queries in Campus Community.
- For **Course/Section** queries, see Documentation for Course/Section SQL Queries in Campus Community.
- For **Student** queries, see Documentation for Student SQL Queries in Campus Community

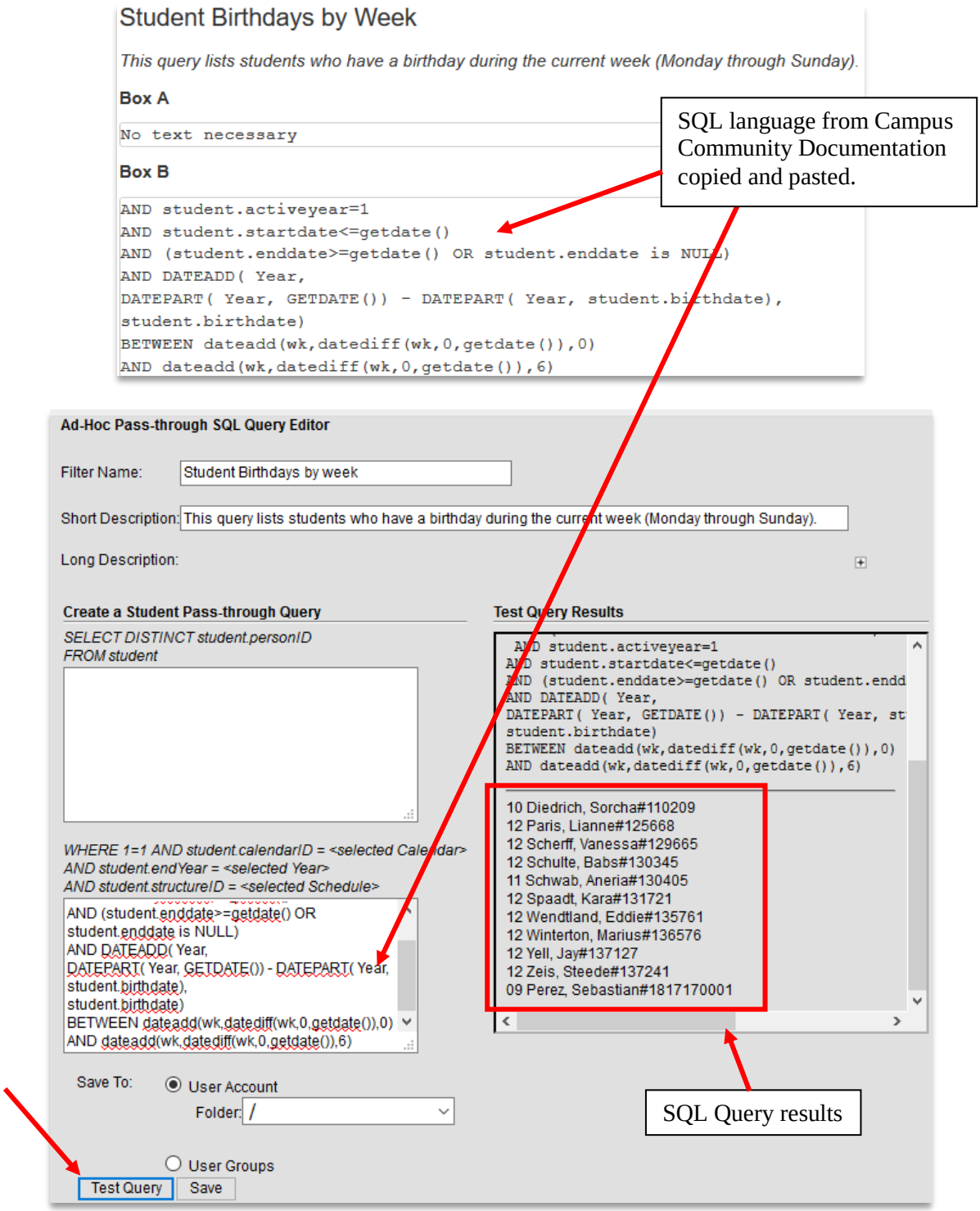
Some of the above queries may require adjustment to obtain district specific results. The articles above indicate which SQL queries require adjustment in the description.

Users should review documentation for Pass-through SQL Queries before creating an SQL Query. To create a new filter:

1. Navigate to *Ad Hoc Reporting > Filter Designer*.
2. Under Filter Type, select <Pass-through SQL Query>.
3. Select Data Type. Options include Student, Census/Staff, and Course/Section. Select <Student>. Click on <Create>. Enter the 'Filter Name'.
4. Enter a Short and/or Long Description as needed to identify query.
5. Compose Pass-Through SQL Query using SQL language **OR** copy and paste SQL language from Campus Community Documentation (See above for links to Campus Community) as appropriate. "Box A" refers to the upper text box that contains the SQL statement. "Box B" refers to the lower text box that specifies conditions of returned results.
6. Click <Test Query> and review results in Test Query Results window. Click <Save>.

7. The saved query will appear in the Saved Filter window of the Ad Hoc Filter Designer screen.

Sample SQL Query

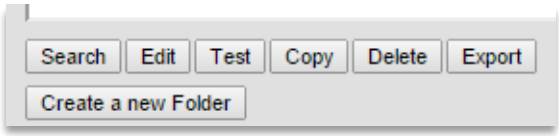


8. Copying and pasting from word processing programs is **NOT** recommended.

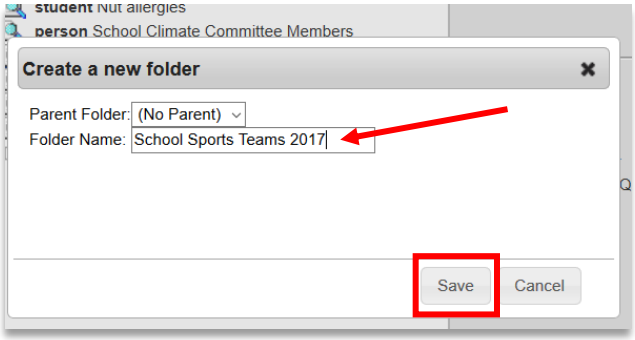
ORGANIZE THE FILTERS

Creating Folders

1. Navigate to *Ad Hoc Reporting > Filter Designer*.
2. Click the button named <Create a new Folder>.



3. Type a descriptive name in the 'Folder Name' box, and click <Save>.



Creating Nested Folders

1. If any previously created folders exist and the user wants a folder 'nested' inside the other folder, the user can create a new folder, and select the other folder in the 'Parent Folder' dropdown list. (If this is the user's first folder, the dropdown will be empty.)
2. Click <Save>.

Placing Filters in Folders

The easiest way to put already created filters into a folder is to drag and drop the filter into the folder.

1. Select a previously created filter by clicking on it, and hold the mouse key.
2. Drag the filter to one of the new folders. Letting go of the filter will drop it in the folder.
3. Confirm the selection by clicking <OK> on the resulting dialogue box.
4. Note the Filter is now 'within' the folder. It can be dragged back out of the folder the same way.

A folder may be placed within an existing folder by editing the folder.

Editing, Renaming, or Moving Folders

Folders can be renamed or the title edited:

1. Simply select the folder by clicking it once. Note the <Edit> and the <Delete> buttons at the bottom of the Saved Filters window are now available.
2. Click the <Edit> button.
3. Highlight the *Folder name*, and re-type the new name in the field.
4. Click <Save>.

While Editing a Folder, it is also easy to move it by editing its location, if at least two folders exist:

1. Click the folder once. Again, Note the <Edit> and the <Delete> buttons at the bottom of the Saved Filters window are now available.
2. Click <Edit> and open the *Parent Folder* drop list. All other folders in the Saved Filters window will be on the list.
3. Select a folder, and click <Save>. The folder will now be located within the other folder.

Deleting Folders

If there is a filter within a folder, the filter must be moved or deleted before the system will allow the folder to be deleted. Once the filter has been moved, deleting a folder is simple:

1. Click the folder once. The <Delete> button at the bottom of the Saved Filters window is now available.
2. Click <Delete>. Click <OK> in the dialog box to confirm the deletion of the folder.
3. The folder is deleted.

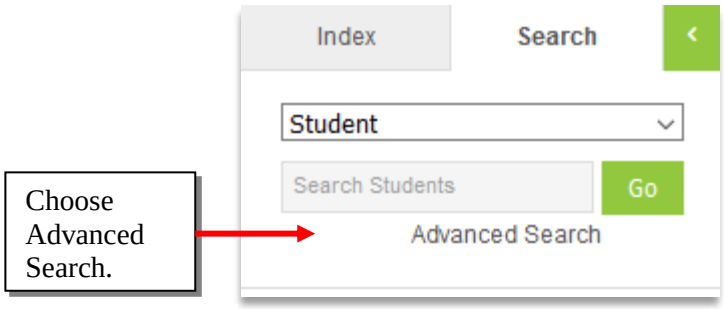
USING THE FILTERS

Description

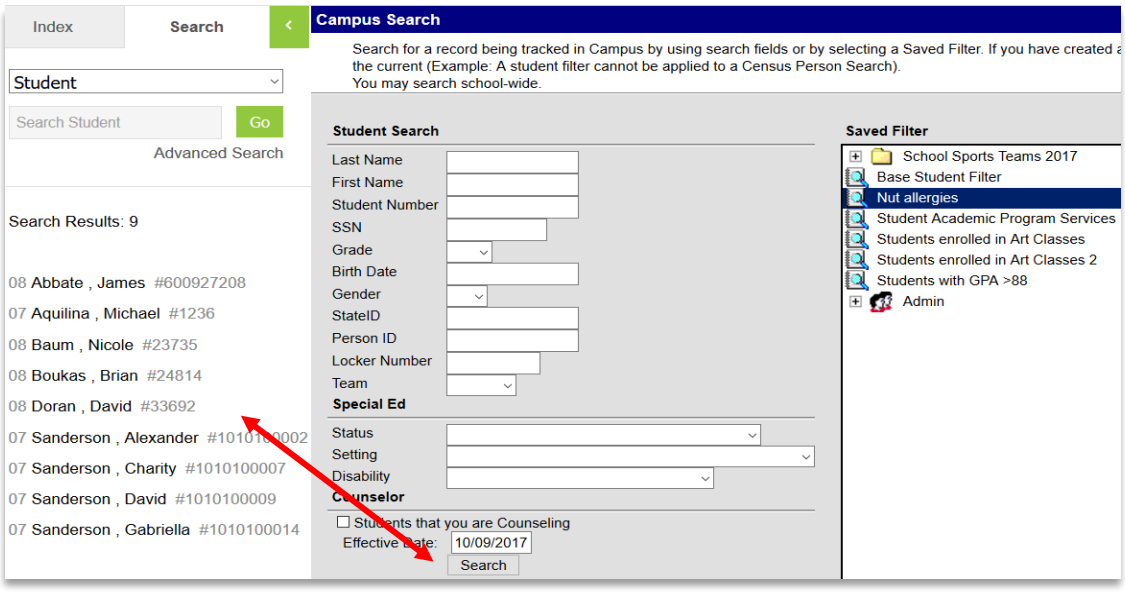
The filters can be used to search for the information (i.e., students) or run reports based on filtered information.

Search Using the Filters

1. Navigate to **Search** tab.
2. Choose the correct *Search* criteria (i.e., Student, All People, Course/Section).
3. Click on the <Advanced Search> link.



4. The system will display the search criteria and the **Saved Filters** box. Choose the filter needed and double click or click on the <Search> button within the box.



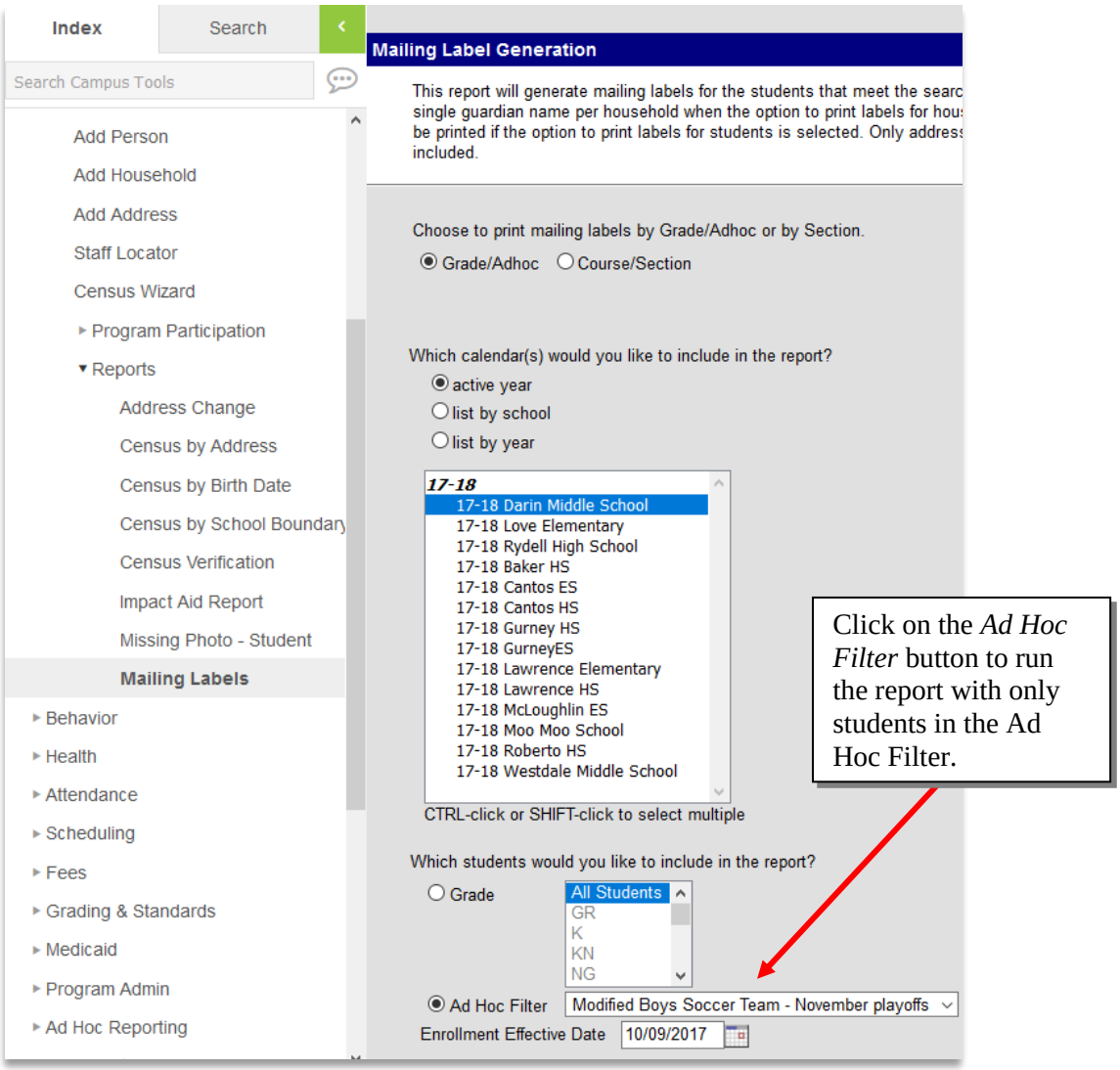
5. The information included in the filter will display in the **Search Results** box in the outline.

Note: Only the pertinent filters will display. For example, only Student filters will display when choosing to *Search: Student*, only Course/Section filters will display when choosing to *Search: Course/Section*.

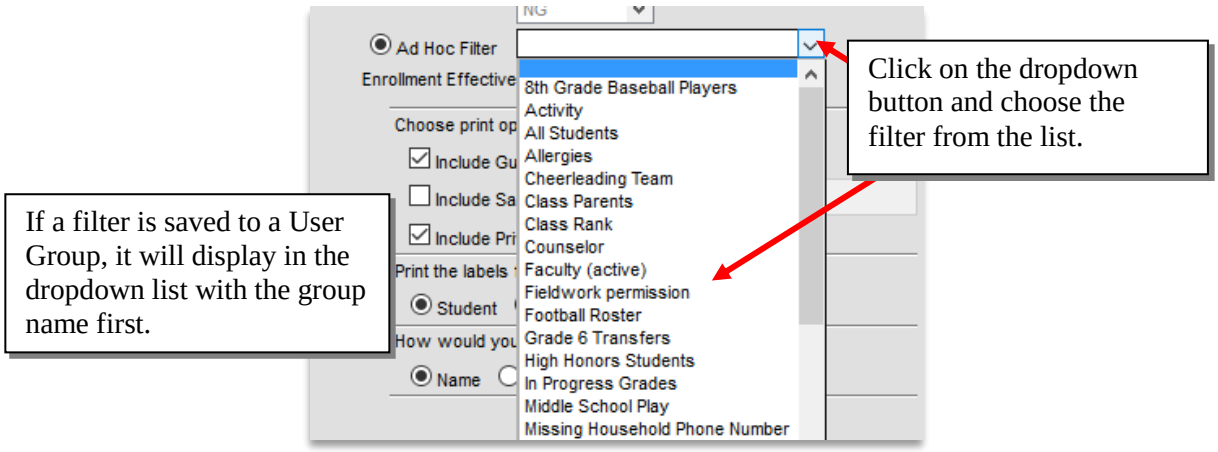
Use the Filter in a Report

Filters can be used to limit the information printing on Infinite Campus' canned reports (i.e., run labels only for the Free Lunch students (*Census > Reports > Mailing Labels),* look for failing grades *(Grading & Standards > Reports > Grades Report)* for the Chess Club students).

1. Navigate to the report needed. Below is *Census > Reports > Mailing Labels*
2. If the report has an option to choose information by <Ad Hoc Filter>, click the radio button. If there is no *Ad Hoc Filter* option, the report can't be filtered.



3. Click on the dropdown button and choose the filter from the list.



4. Complete all fields needed and run the report. It will use only the students included in the filter.

DATA VIEWER

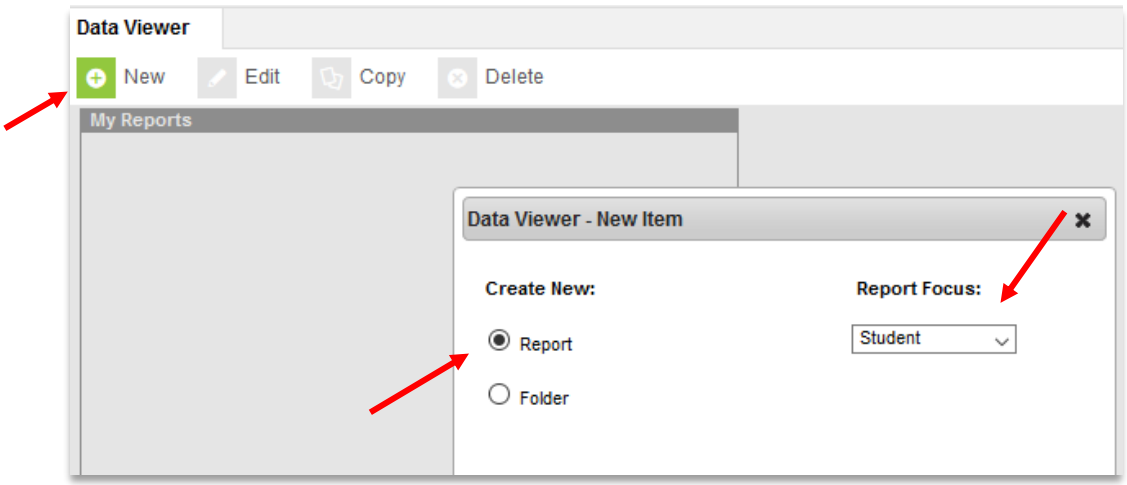
Description

The Data Viewer is a user-friendly report building tool which allows users to drag and drop fields into a real-time view of the report as it is being built. Each report must have a unique name in order to save correctly. The Data Viewer has less functionality than the Filter Designer and is used primarily for quick reports.

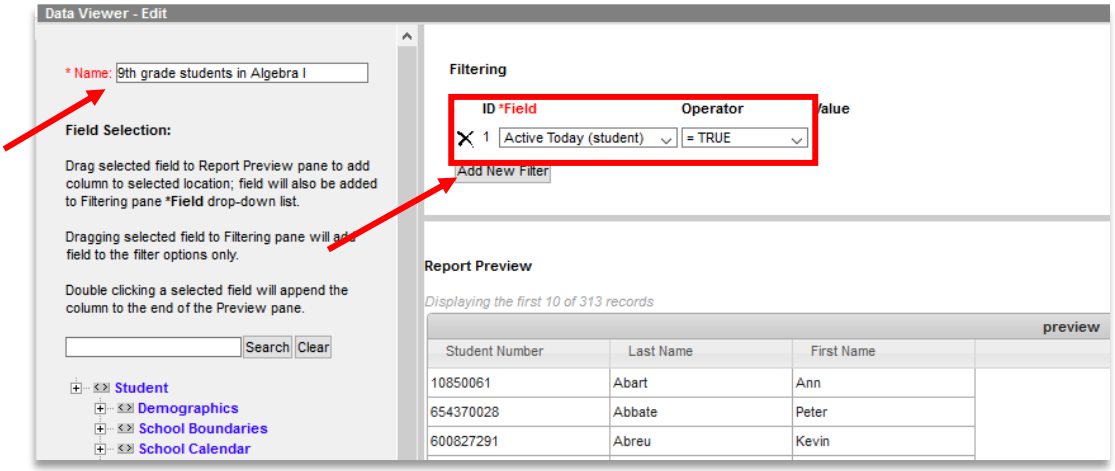
Create a New Report

1. Navigate to *Ad Hoc Reporting* > *Data Viewer*.
2. To create a new report, click on the <New> button.
3. Select 'Report'.

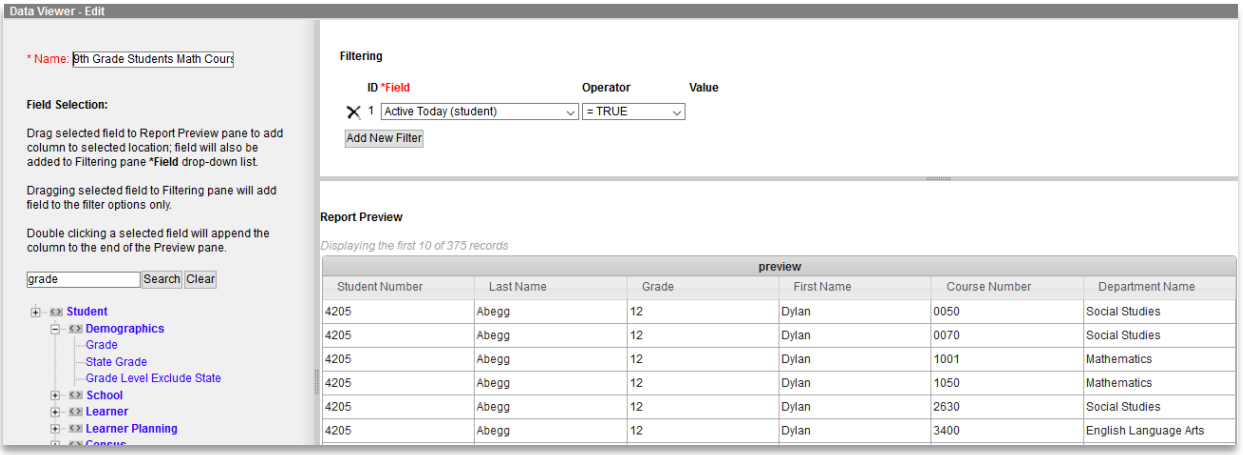
Select the type of Report Focus from the dropdown list. The options are Student, Census/Staff, or Course/Section. When finished click <OK>.



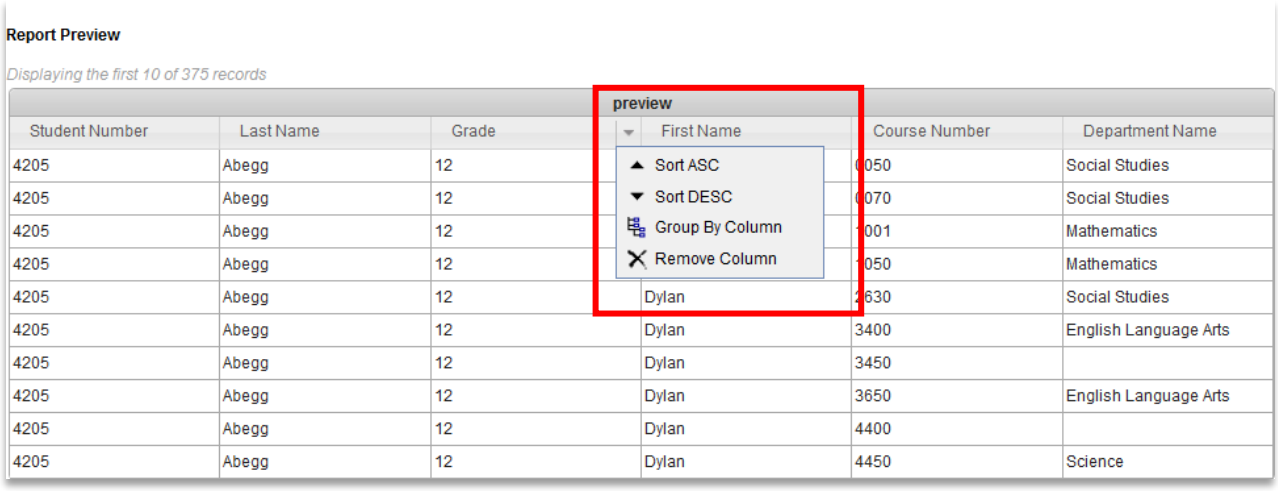
4. Enter the name of the report in the 'Name' field. Notice that the report is automatically filtered to 'Active Today' and that the Student Number, Last Name, and First Name fields are pre-populated by default.



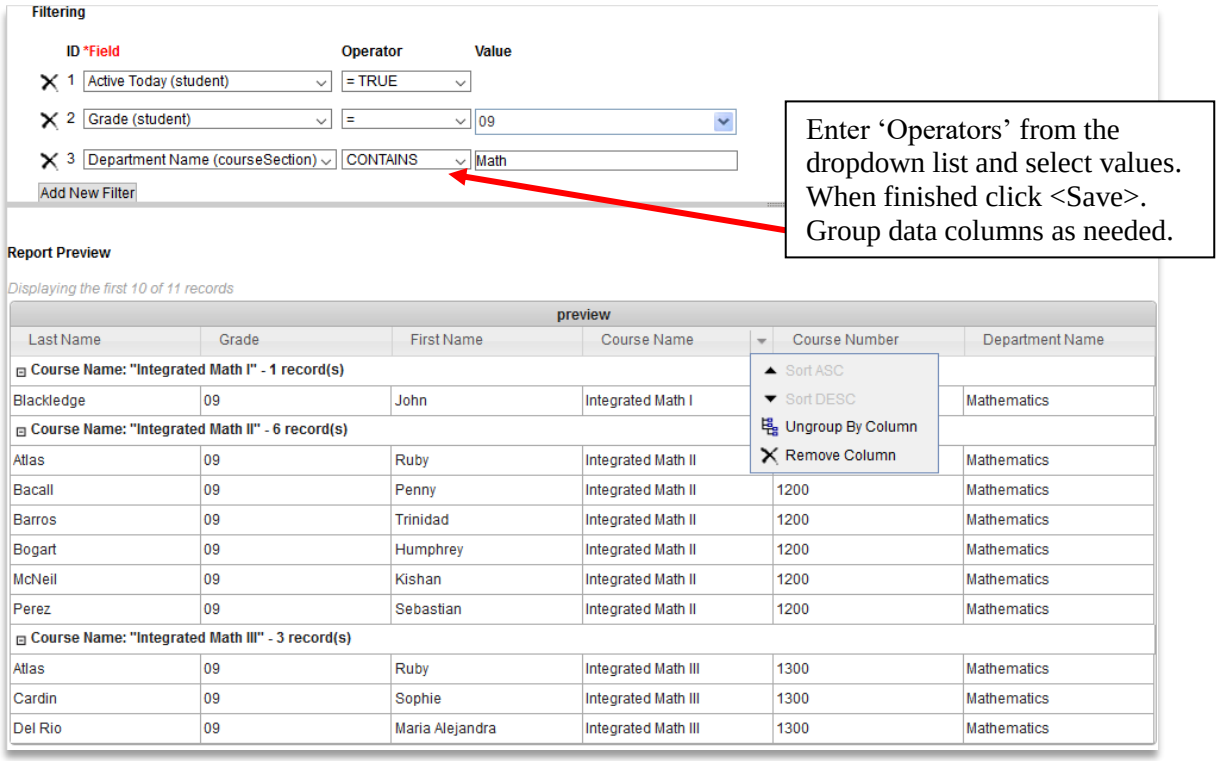
5. Fields from the Field Selection list can be added to the Report Preview screen by dragging them into a column location in the Report Preview area. The first 10 records will display in the Report Preview.
6. Select the fields to be included in the report. Double-clicking on a field will automatically place the field at the far right of the report. Columns can be rearranged by dragging into the desired location. The report will refresh in real-time each time a new field is added. The first ten records of the report will display.



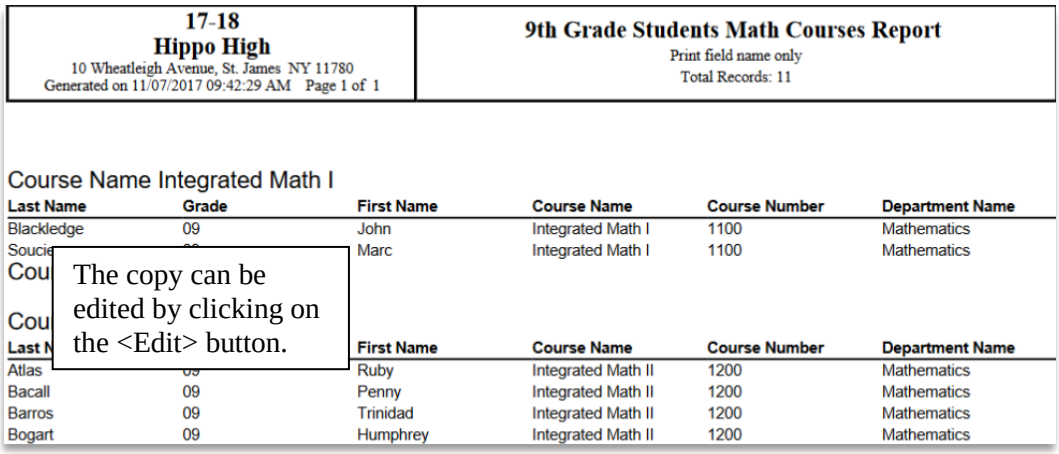
7. Column names can be changed by double clicking the header.
8. Each column can be sorted or removed by clicking the arrow on the right side of each column heading. Selecting 'Group By Column' will organize each record by the data reported in the selected column.



9. Filtering allows users to apply operators to report fields. Select fields from the list on the left to be used as filters and drag them to the filtering editor.
10. Apply operators to the filters using the dropdown list and add the appropriate values to filter the data.
11. To remove a filter click on the 'X' in front of the appropriate filter.
12. Deleting a filter will not delete the fields displayed in the Report Preview pane.
13. When finished, click <Save>.



14. Users may print the report in pdf format by selecting <Print>. A report will generate in a separate window.



17-18
Hippo High
10 Wheatleigh Avenue, St. James NY 11780
Generated on 11/07/2017 09:42:29 AM Page 1 of 1

9th Grade Students Math Courses Report
Print field name only
Total Records: 11

Course Name Integrated Math I

Last Name	Grade	First Name	Course Name	Course Number	Department Name
Blackledge	09	John	Integrated Math I	1100	Mathematics
Soucie		Marc	Integrated Math I	1100	Mathematics

Cou

Cou

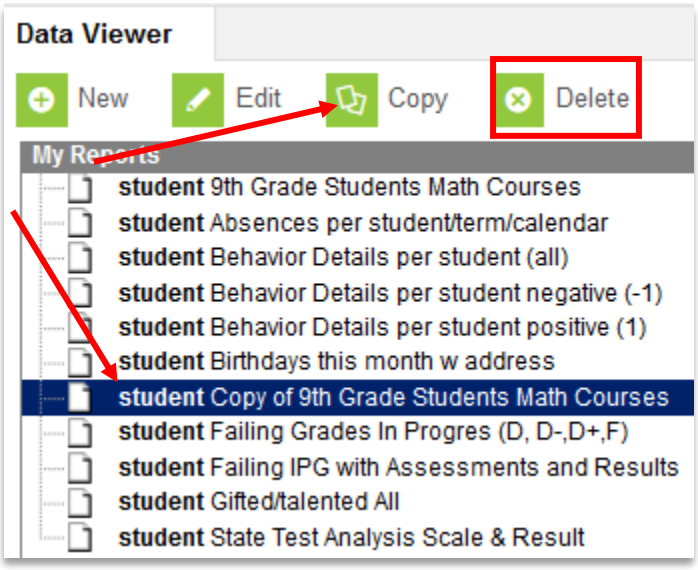
Last N		First Name	Course Name	Course Number	Department Name
Atlas		Ruby	Integrated Math II	1200	Mathematics
Bacall	09	Penny	Integrated Math II	1200	Mathematics
Barros	09	Trinidad	Integrated Math II	1200	Mathematics
Bogart	09	Humphrey	Integrated Math II	1200	Mathematics

The copy can be edited by clicking on the <Edit> button.

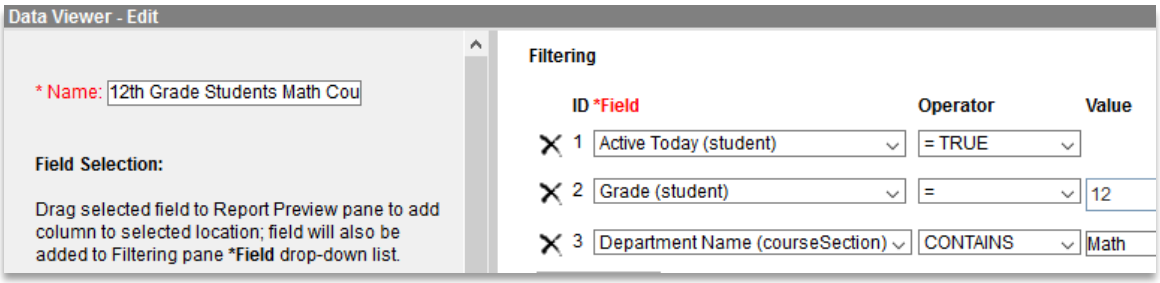
Copying and Editing an Existing Report

Users can also copy and edit an existing report from the My Reports window.

1. Navigate to *Ad Hoc Reporting* > *Data Viewer*.
2. Selecting the desired report from the My Reports window.
3. Click on the <Copy> button.



4. Change the name of the copy. Change operators and/or fields as needed.

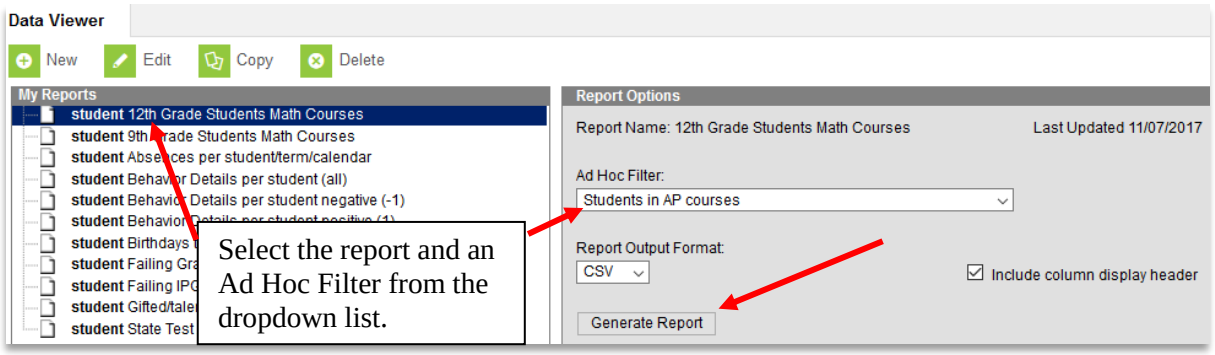


5. When finished. Click on <Save>. Print report.
6. A report will generate in a separate window.

Add an Ad Hoc Filter to an Existing Report

An Ad Hoc filter can be applied to an existing report to further filter data.

1. Navigate to *Ad Hoc Reporting > Data Viewer*.
2. Select a report from the My Reports window.
3. Select a filter from the Ad Hoc Filter dropdown list.
4. Select the 'Report Output Format'. Reports can be created in PDF, HTML, or CSV format.
5. If selecting a CSV file, indicate whether column headers should display.
6. Click the <Generate Report> button.



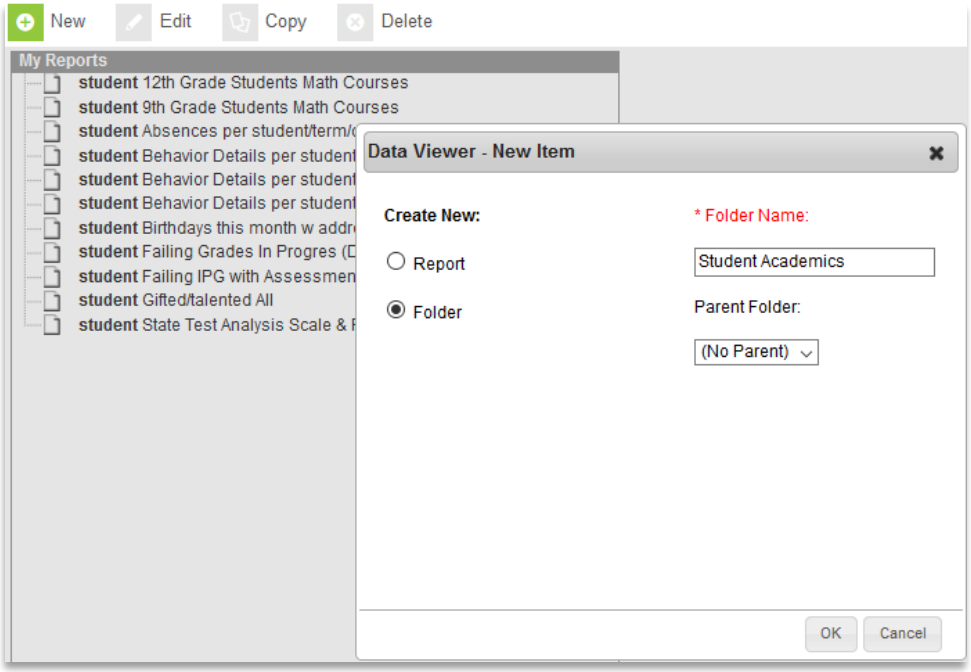
7. A report will generate in a separate window.

	A	B	C	D	E	F	G
1	Last Name	Grade	First Nam	Course Na	Course Nu	Department Name	
2	Abegg	12	Dylan	AP Calculu	1050	Mathematics	
3	Abegg	12	Dylan	AP Statisti	1001	Mathematics	
4	Gilgian	12	Alula	AP Statisti	1001	Mathematics	
5	Paternost	12	Tobias	AP Statisti	1001	Mathematics	
6	Schopf	12	Tamara	AP Statisti	1001	Mathematics	
7	Vonderbo	12	Leal	AP Statisti	1001	Mathematics	
8	Wedell	12	Zahid	AP Statisti	1001	Mathematics	
9	Weyrauch	12	Tanner	AP Statisti	1001	Mathematics	
10	Wolffert	12	Lara	AP Statisti	1001	Mathematics	
11	Zimmer	12	Gamze	AP Statisti	1001	Mathematics	
12	Zutavern	12	Barney	AP Statisti	1001	Mathematics	

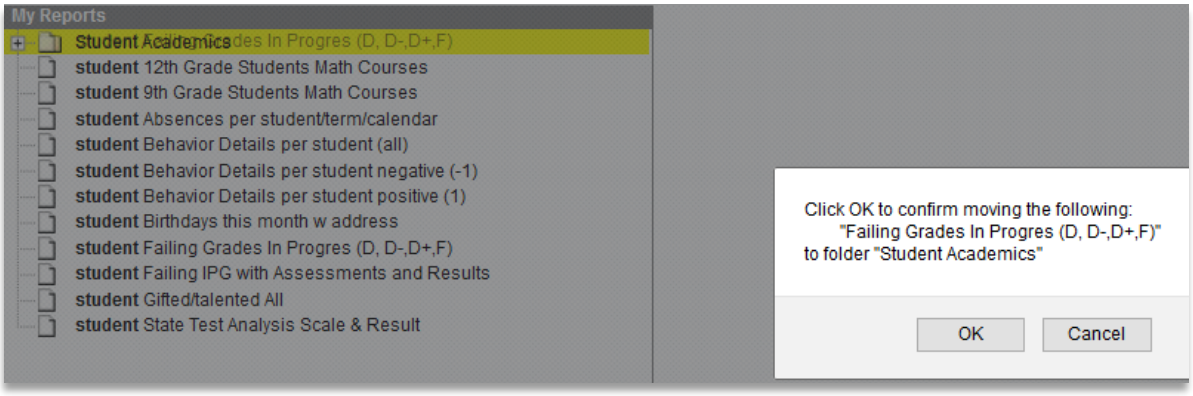
Creating Folders

Reports can be organized into folders.

1. Navigate to *Ad Hoc Reporting* > *Data Viewer*.
2. Click on <New>.
3. Select <Folder>.
4. Enter Folder Name in the *Folder Name* field.



5. Select 'Parent Folder' if applicable.
6. Click <OK> to create folder.
7. The folder will be added to the My Reports window or within the selected Parent Folder.
8. Reports can be moved in and out of folders by clicking and dragging the report into a folder or dragged out of a folder. The folder receiving the moving report will appear in yellow.



9. See ORGANIZE THE FILTERS for more information on managing filters in campus.

DATA EXPORT

Description

The Query Wizard and Selection Editor filters can be exported out of Infinite Campus to other programs.

The Student Selection Editor will only export the Grade, Last Name, First Name, Middle Name and Student Number. The Census/Staff Selection Editor will only export the First and Last name.

The Query Wizard filter will export whatever fields were chosen within the Query.

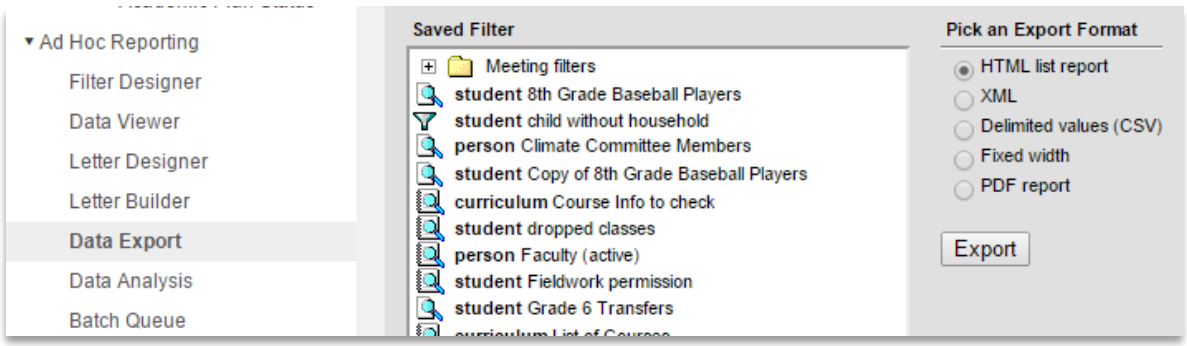
These filters can be exported as the following files:

- HTML list report (the default view observed when each filter is run.)
- XML – excellent for porting the data to other programs
- **Delimited Values(CSV) – this is used most often as it will export into Excel**
- Fixed Width – used if field length need to be controlled.
- **PDF report –** formatted with headers matching Infinite Campus reports

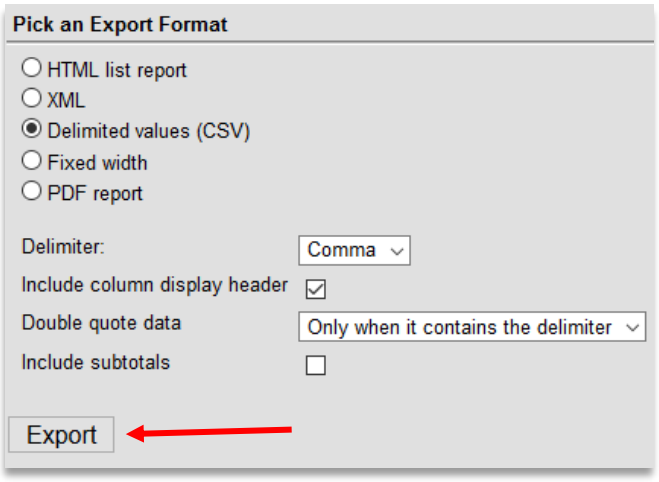
Exporting a Filter to a CSV / Excel File

Once the filter/report is outside of Infinite Campus as a CSV file, it can be saved / edited within Excel as needed.

1. Navigate to *Ad Hoc Reporting* > *Data Export* to export any filter type.
2. In the **Saved Filter** box, click on the filter to export. (Click on the + next to the group to display all the shared filters.) Any filter a user has access to can be exported, including ones created using the *Selection Query* and *Pass-Through SQL Query* method.



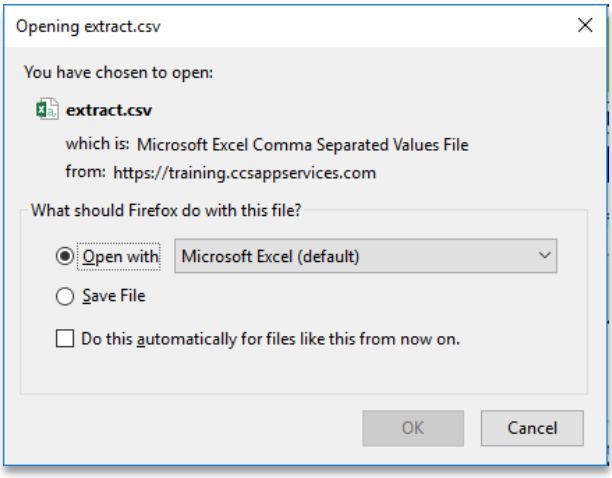
3. In the **Pick an Export Format** section, choose the export format needed. Note the options vary with the Format selected.



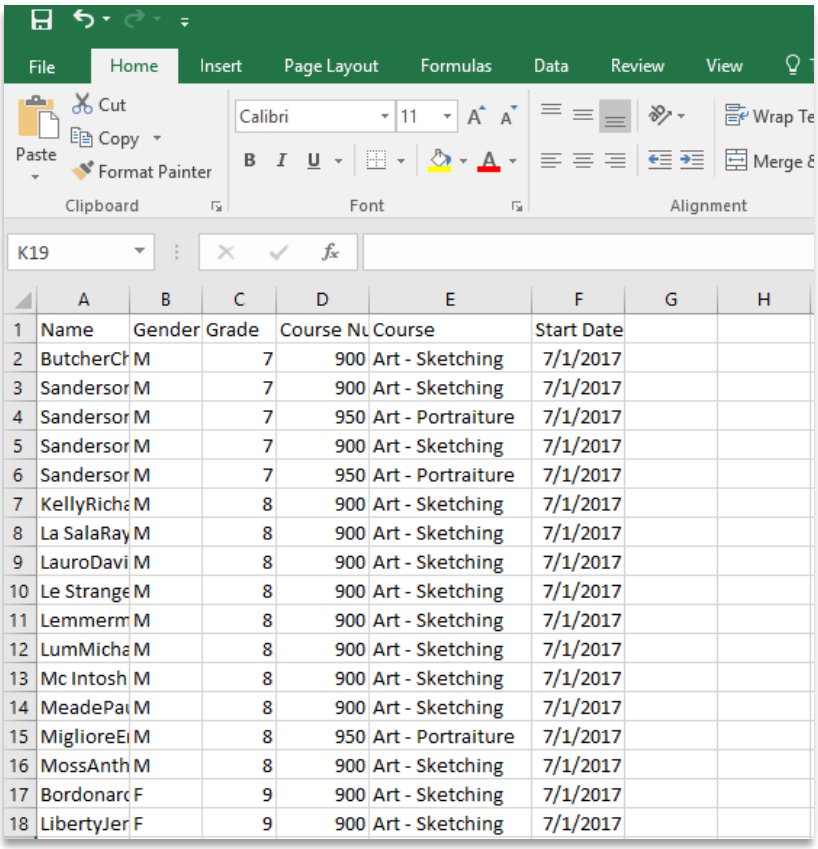
Use **Delimited values (CSV)** as shown above to transfer the data to Excel for further filtering, or to use the data in other Microsoft Office programs such as Word.

4. Click on the <Export> button.
5. A **File Download** box will display. Choose to <Open> or <Save> the file.

   Note: The File download will display differently based on the browser.



6. The report will open (or save) in the format needed. Following is an example of the Flag filter created above, opened in Microsoft Excel 2016. All of the fields selected when building the filter are shown in a separate column. Each student's information that matched the criteria value selections are on a separate row. (Database users call each row a *record*.)



	A	B	C	D	E	F	G	H
1	Name	Gender	Grade	Course Nu	Course	Start Date		
2	ButcherCh	M	7	900	Art - Sketching	7/1/2017		
3	Sandersor	M	7	900	Art - Sketching	7/1/2017		
4	Sandersor	M	7	950	Art - Portraiture	7/1/2017		
5	Sandersor	M	7	900	Art - Sketching	7/1/2017		
6	Sandersor	M	7	950	Art - Portraiture	7/1/2017		
7	KellyRicha	M	8	900	Art - Sketching	7/1/2017		
8	La SalaRay	M	8	900	Art - Sketching	7/1/2017		
9	LauroDavi	M	8	900	Art - Sketching	7/1/2017		
10	Le Strange	M	8	900	Art - Sketching	7/1/2017		
11	Lemmerm	M	8	900	Art - Sketching	7/1/2017		
12	LumMicha	M	8	900	Art - Sketching	7/1/2017		
13	Mc Intosh	M	8	900	Art - Sketching	7/1/2017		
14	MeadePat	M	8	900	Art - Sketching	7/1/2017		
15	MiglioreEl	M	8	950	Art - Portraiture	7/1/2017		
16	MossAnth	M	8	900	Art - Sketching	7/1/2017		
17	Bordonarc	F	9	900	Art - Sketching	7/1/2017		
18	LibertyJer	F	9	900	Art - Sketching	7/1/2017		

7. Note that a .csv file is NOT an Excel file. It is recommended to save the file as an Excel file before a user begins to work with it. The screen will look like an Excel file however the report is actually saving as a .csv unless the file type is changed.

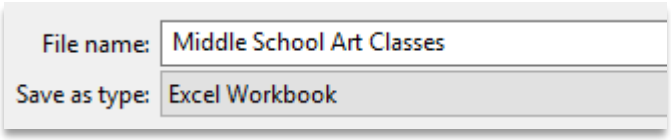
Special Note:

There are a number of things that should be changed before saving the exported .csv file to prevent future difficulties:

- **The worksheet name**
- **The file name** (*choose a descriptive name, without parentheses, punctuation, or brackets.*)
- **The file type** (*choose an Excel workbook type, or formatting added to the data file will be lost.*)
- **The location** of where the file will be saved (*otherwise it will default to a Temp location that may be difficult to locate.*)

The following are the steps to make these changes. It is suggested to make these changes BEFORE working with the data in Excel, to prevent accidentally losing the data by forgetting to make the chances before saving.

8. Save the file as an Excel file where it can be found later and use a descriptive name.
    a. Click on the <File> tab
    b. Choose <Save As> in the subsequent menu on the far left (Do not select <Save As> Read-Only Workbook.)
    c. Choose (or create) a folder in which to save the file. This is important, since the default location folder is often very difficult for users to locate later.
    d. In the *File Name* field, type a descriptive name without parentheses. Do not use '/', ',' or '.' in this name. Excel will add the appropriate file extension when designated as an Excel file type and save. (See next step.)
    e. In the 'Save as type' dropdown, select 'Excel Workbook'. (By default on PCs, this is usually the highest item in the 'Save as type' dropdown list.)



    f. Click on <Save>. The file is now saved as an Excel file and all changes will be saved.

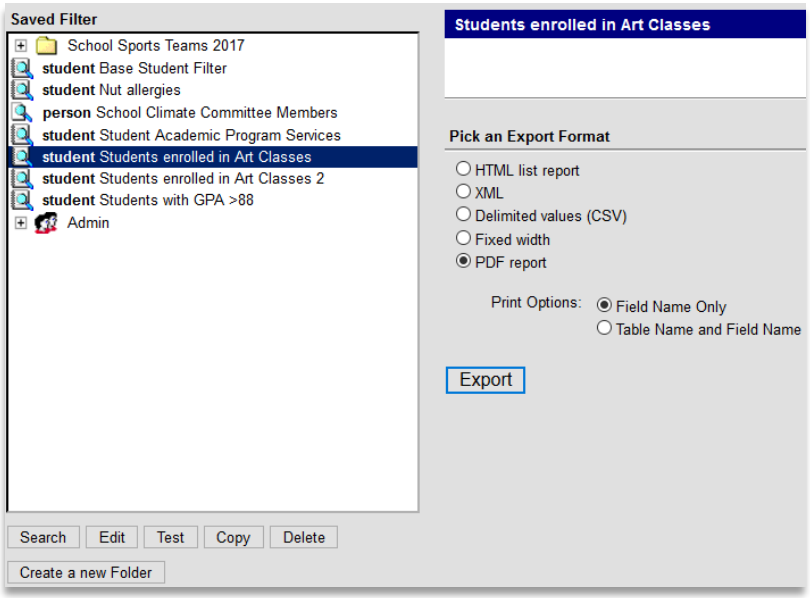
Changes may now be made to the file and the formatting and functions will not be lost if the <Save> tool button is used in Excel. After making changes, be sure to save when finished working with the file. Close Excel.

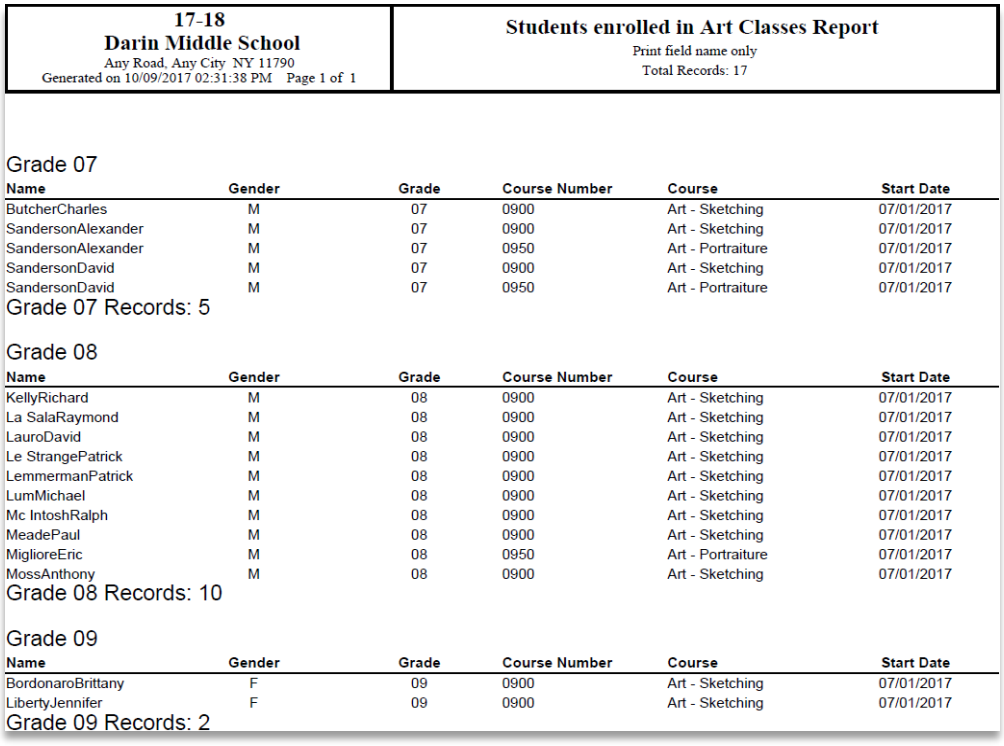
Special Note:
Opening directly into Excel will reformat data, most commonly to remove leading zeros. To retain source data download file and import data into a blank Excel workbook. This will give the user an opportunity to define the data type and format.

Exporting a Filter to a PDF / Print Report

1. Navigate to: *Ad Hoc Reporting* > *Data Export* to export any filter type.
2. In the **Saved Filter** box, click on the filter to export. (Click on the + next to the group to display all the shared filters.) Any filter to which the user has access can be exported, including ones created using the *Selection Query* and *Pass-Through SQL Query* method.
3. Select the Filter, then choose the *PDF Report* button. This will trigger a further choice of <Field Name Only> or <Table and Field Name>. The usual choice is to accept the default <Field Name Only>.

4. Click the <Export> button. Click <Open> button on the File Download dialog box.
5. The PDF (Portable Document File) will open. The file can be saved or printed.





17-18
Darin Middle School
Any Road, Any City NY 11790
Generated on 10/09/2017 02:31:38 PM Page 1 of 1

Students enrolled in Art Classes Report
Print field name only
Total Records: 17

Grade 07

Name	Gender	Grade	Course Number	Course	Start Date
ButcherCharles	M	07	0900	Art - Sketching	07/01/2017
SandersonAlexander	M	07	0900	Art - Sketching	07/01/2017
SandersonAlexander	M	07	0950	Art - Portraiture	07/01/2017
SandersonDavid	M	07	0900	Art - Sketching	07/01/2017
SandersonDavid	M	07	0950	Art - Portraiture	07/01/2017

Grade 07 Records: 5

Grade 08

Name	Gender	Grade	Course Number	Course	Start Date
KellyRichard	M	08	0900	Art - Sketching	07/01/2017
La SalaRaymond	M	08	0900	Art - Sketching	07/01/2017
LauroDavid	M	08	0900	Art - Sketching	07/01/2017
Le StrangePatrick	M	08	0900	Art - Sketching	07/01/2017
LemmermanPatrick	M	08	0900	Art - Sketching	07/01/2017
LumMichael	M	08	0900	Art - Sketching	07/01/2017
Mc IntoshRalph	M	08	0900	Art - Sketching	07/01/2017
MeadePaul	M	08	0900	Art - Sketching	07/01/2017
MiglioreEric	M	08	0950	Art - Portraiture	07/01/2017
MossAnthony	M	08	0900	Art - Sketching	07/01/2017

Grade 08 Records: 10

Grade 09

Name	Gender	Grade	Course Number	Course	Start Date
BordonaroBrittany	F	09	0900	Art - Sketching	07/01/2017
LibertyJennifer	F	09	0900	Art - Sketching	07/01/2017

Grade 09 Records: 2

6. Note: The document automatically decides:
    - Portrait or landscape, based on the number of columns needed.
    - The title of the report, based on the title of the filter.

- The name of the columns based on the output formatting of fields in the filter.
- It also prints the date and time the report was run.
- And it counts the records in the completed report (if aggregated in the original filter, they will also aggregate in the pdf filter report.

7. Close the document before running another file.

Setting the Column Headers for Exported Filters

If Ad Hoc Filter column headers have not been formatted using the Output Formatting Screen in the Filter Designer, users can also use the Data Export tool to edit a filter.

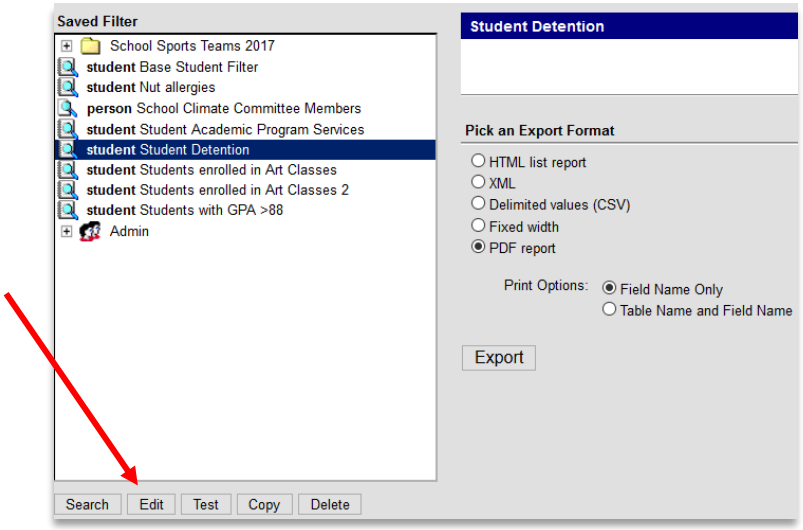
17-18
Darin Middle School
Any Road, Any City NY 11790
Generated on 10/09/2017 03:33:03 PM Page 1 of 1

Student Detention Report
Print field name only
Total Records: 5

firstName	lastName	gender	detentionStatus	resolutionStartDate	resolutionStatus	duration
Olivia	Alvarez	F	CM	06/23/2017	CM	4
Olivia	Alvarez	F	CM	09/29/2017	CM	4
Wenxin	Bauman	M	CM	09/29/2017	CM	4
John	Hanks	M	CM	09/29/2017	IP	4
Erick	Smith	M	CM	09/29/2017	IP	4

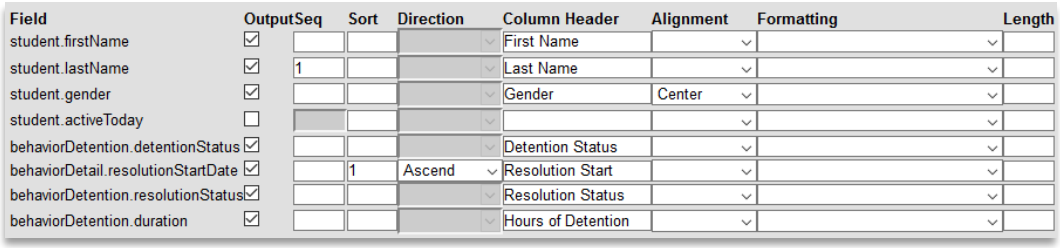
Filters can be edited either in *Ad Hoc Reporting > Filter Designer* or in *Ad Hoc Reporting > Data Export.*

1. In the **Data Export** window, choose *PDF Report.*
2. Select one of the Filters.



3. Click on <Edit> at the bottom of the Saved Filters window.

4. The fields used in this report on this page can be edited. Once the fields needed for the report are as required, click <Next>.
5. The filtering criteria may be changed on this page. Once the criteria is correctly filtered for this report, click <Next>.
6. The **Format the output file/report** page will appear. (See picture below).



Field	Output	Seq	Sort	Direction	Column Header	Alignment	Formatting	Length
student.firstName	☑				First Name			
student.lastName	☑	1			Last Name			
student.gender	☑				Gender	Center		
student.activeToday	☐							
behaviorDetention.detentionStatus	☑				Detention Status			
behaviorDetail.resolutionStartDate	☑		1	Ascend	Resolution Start			
behaviorDetention.resolutionStatus	☑				Resolution Status			
behaviorDetention.duration	☑				Hours of Detention			

Special Note:

- Check Output columns to print or export. *The Student.activeToday column has been unchecked, since it does not needed to be printed.*
- The *Seq* column decides the order the columns will print. *In the example, the Last Name column will move to the first column.*
- The *Sort* column shows which order the fields will be sorted. *In the example, by resolution start.*
- 'Direction' notes the resolution start date will be ascending in the sort order.
- Under column header, "reader friendly" names replace the data field names.
- If any of the columns must be a fixed width, use 'zero pad' – but the length must be designated if this option is selected.
- The option to force the column fields into Upper Case is also available.

Save these changes, return to *Ad Hoc Reporting > Data Export* and export this filter to PDF. Below is output example of the report.

17-18
Darin Middle School
Any Road, Any City NY 11790
Generated on 10/09/2017 03:42:57 PM Page 1 of 1

Student Detention Report
Print field name only
Total Records: 5

Last Name	First Name	Gender	Detention Status	Resolution Start	Resolution Status	Hours of Detention
Alvarez	Olivia	F	CM	06/23/2017	CM	4
Alvarez	Olivia	F	CM	09/29/2017	CM	4
Bauman	Wenxin	M	CM	09/29/2017	CM	4
Hanks	John	M	CM	09/29/2017	IP	4
Smith	Erick	M	CM	09/29/2017	IP	4

LETTER DESIGNER & LETTER BUILDER

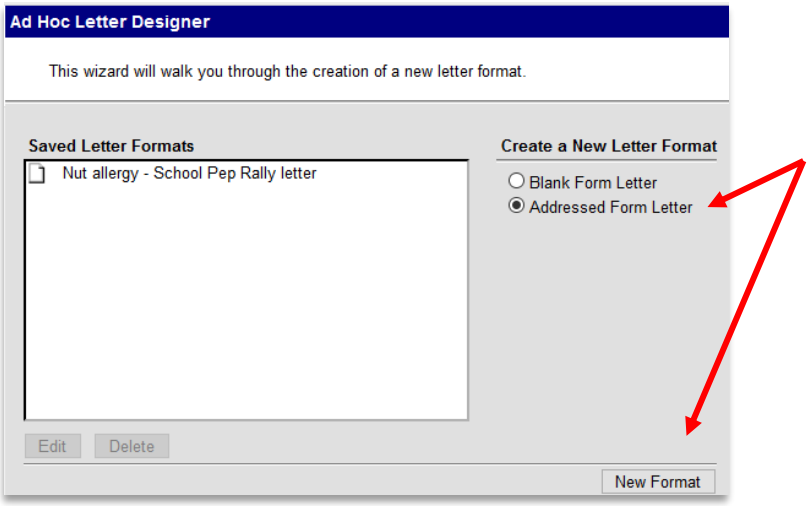
Description

The Ad Hoc Reporting tool can be used to create student letters. Although the system will create the letters for all students, they can be filtered using one or more Ad Hoc Filters to print the letters for a limited number of students. These letters are available for viewing in the *Student Information > General* module, **AdHoc Letters** tab by the user who created them (or if saved to a Group, any user in the group).

Letter Designer

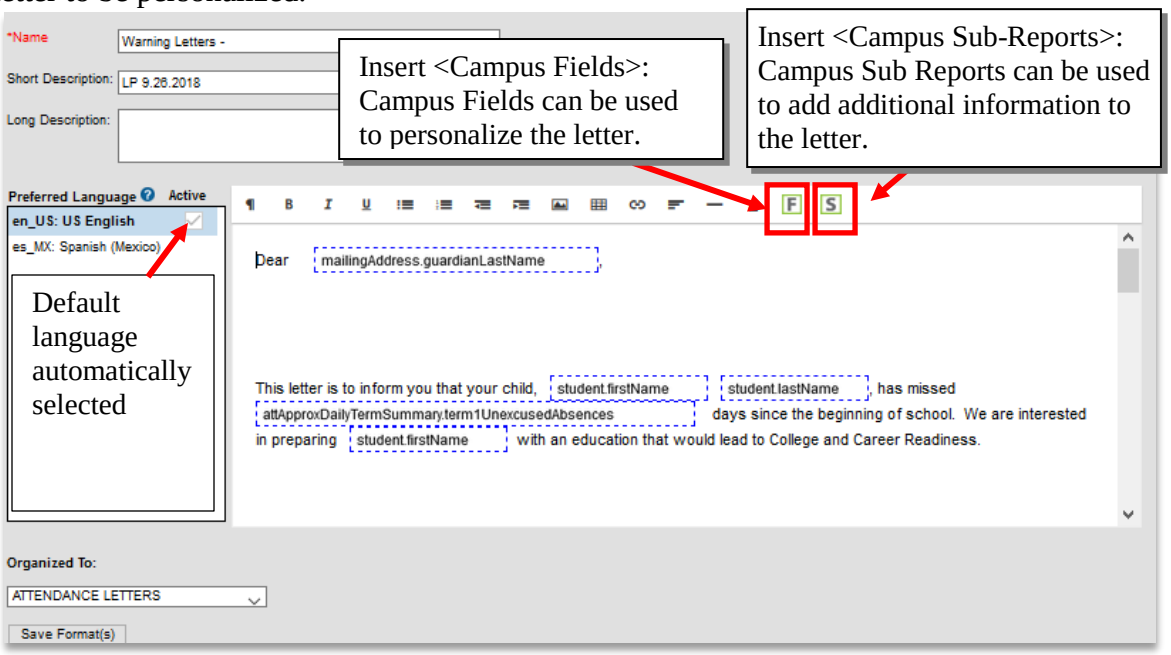
The *Ad Hoc Reporting > Letter Designer* is used to create a letter with fields that can be merged with information from Infinite Campus fields. This tool designs the letter which can be matched with the filter(s) in *Ad Hoc > Letter Builder. (*See *Letter Builder on p. 65.)* to mass print all the letters; to print a copy of one of these letters for a single student, see *Ad hoc Reports*, also below)

1. Navigate to *Ad Hoc Reporting > Letter Designer*.
2. **Create New Letter Format** – click on the button needed. The <Addressed Form Letter> will print the letter with a header including the school name and address as well as the student's mailing address. The <Blank Form Letter> will not add this header.
3. Click on the <New Format> button.



4. The letter format screen will open on the next page.
5. Type the *Name* of the letter. This should be fairly descriptive of the letter's purpose (i.e., 'Field Trip to MOMA' letter, 'Chess Club meeting schedule').
6. Note the Short Description and Long Description areas. These work exactly as they do with the Filters.

7. The screen provides an area for typing and formatting text as well as merging the entered text with Campus Fields and/or Campus Sub Reports that allows each letter to be personalized.



8. Create the letter template first by typing the text in the box as it should appear in the default language. There are several formatting tools that can be used to customize the letter, including **B**old, *I*talics, Underline, and changing the font & font size.

9. In order to customize the letter with the student's name, etc., Campus Fields can be inserted into the body of the letter. Position the cursor where the information should be inserted.

    a. Click on the <Campus Fields> button. The system will display the Campus Fields available.

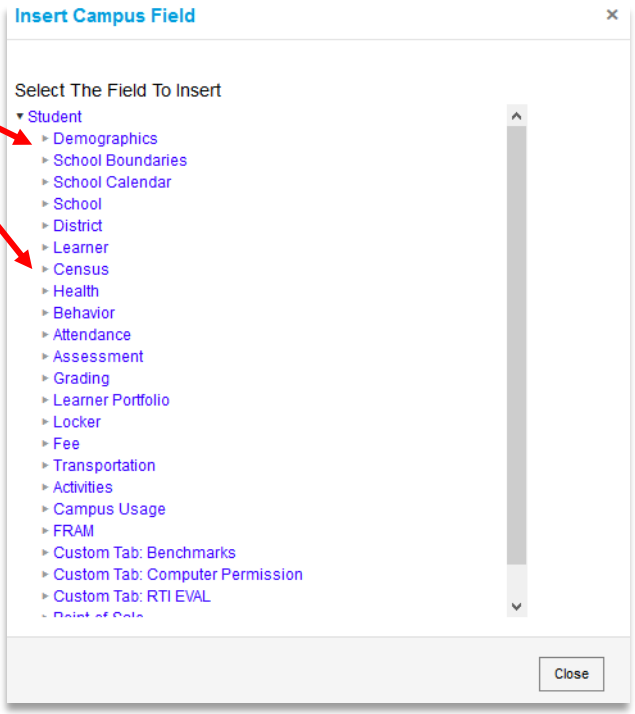
    b. Expand the records by clicking on the ► sign to the left of the Field category needed.

    c. Click on the field name needed in the letter (i.e., first name, last name). HINT: Usually Demographic information is used in these letters.

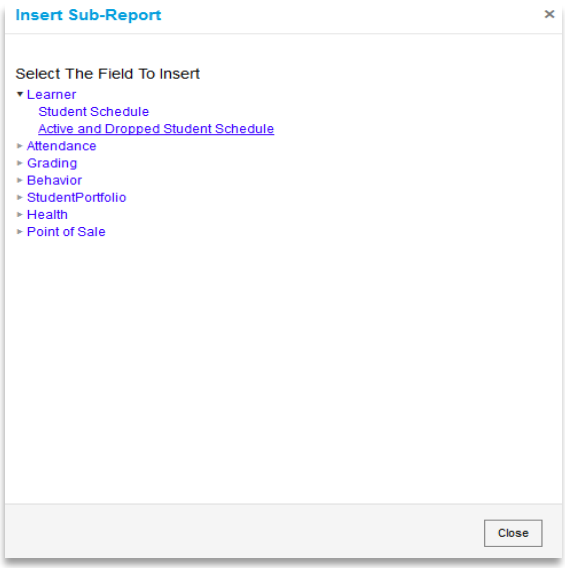
    d. Click on the <Close> button or the <x> in the Insert Campus Field screen to close.

Click on the arrow (►) to open up the record, then choose the field needed.

Most Student information is in *Student > Demographics*.



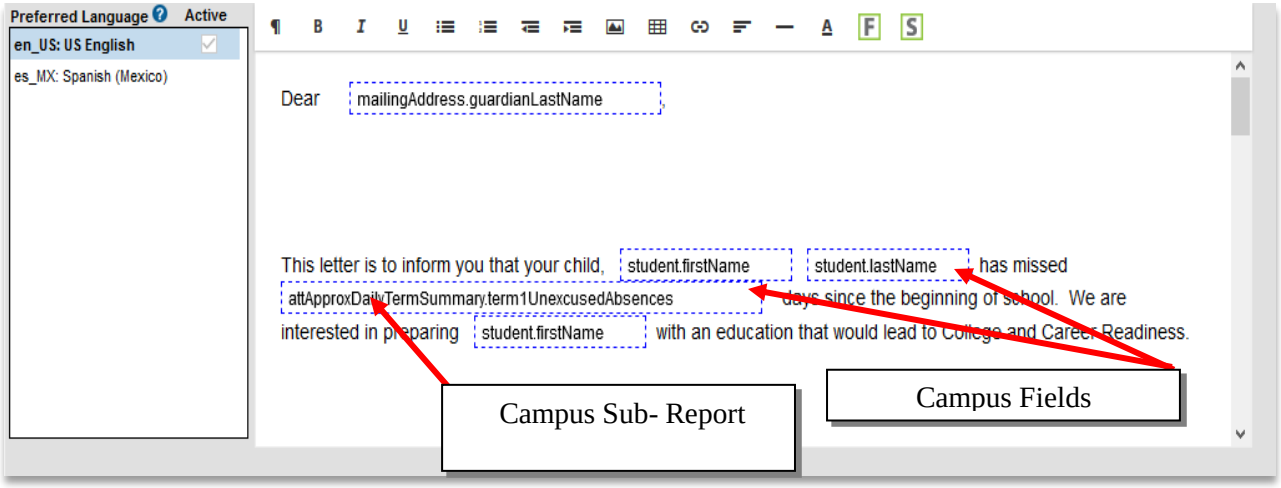
10. Repeat Step 9 (a-d) to add additional fields.
11. Sub-Reports can be added to the letter. These reports pull grouped information from the student's file. Use the Campus <Sub Report> button:



12. Click in the letter to position the cursor where the sub-report needs to be inserted.

a. Click on the <Sub-Report> button. The system will display all the Campus sub report records. Click on the report needed to insert into the letter.

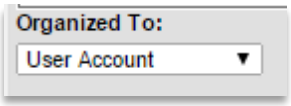
b. Click on the <Close> button in the Insert Sub-Report screen or <x> to close the screen.



c. The Campus Fields show in the letter format with the field name surrounded by a dashed blue line.

d. The Sub Reports show in the letter format with the name of the Sub Report surrounded by a dashed red line.

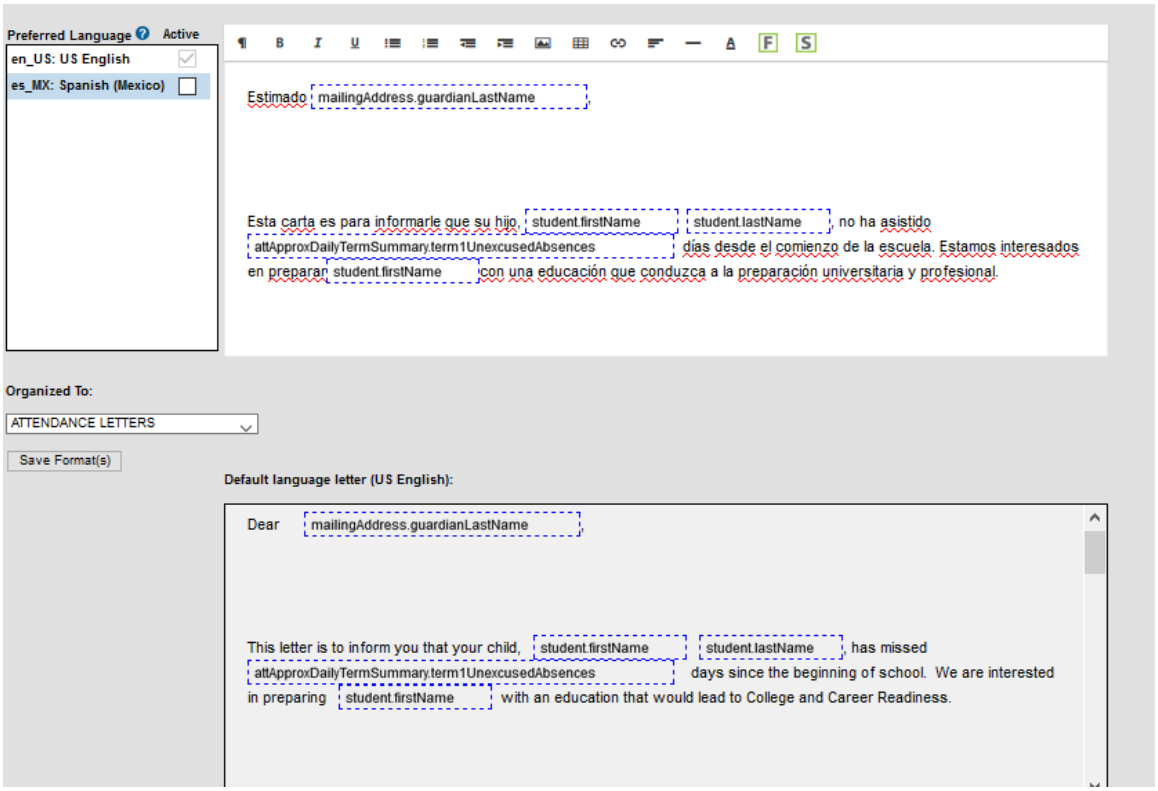
13. *Organize To:* – this box allows the user to save the report to their account or to share with others. Choosing *User Account* will save the report to be used by the creator only. Other options include any Security Group the user belongs to.



14. After creating the letter, click on the <Save Format> button. As soon as the report/letter is created, it can be viewed (and optionally printed) on the *Student Information* > *General* module, **Ad Hoc Reports** tab.

Creating the Letter in Additional Languages-

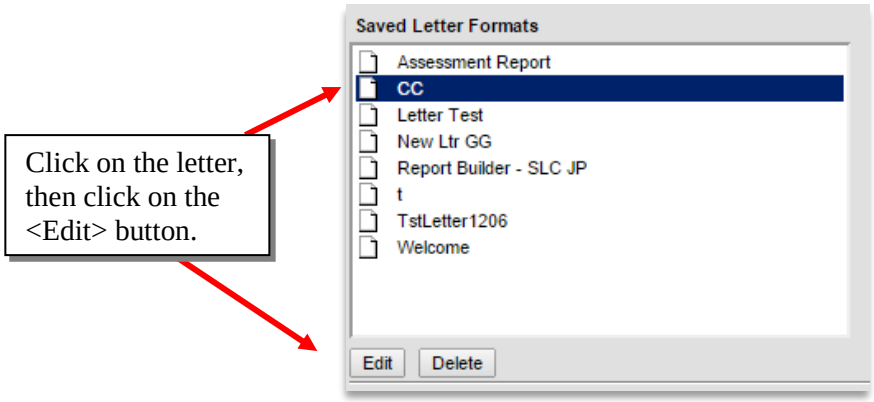
1. After creating the letter in the Default Language, enter text for this same letter in a different language by selecting the language in the Preferred Language list and type/paste translated text into the WYSIWYG editor. That language becomes bold, and an Active checkbox becomes available. A language version of the letter is only a draft until the Active checkbox is marked.
2. When it is determined that the draft letter can be sent, mark the Active checkbox, indicating the letter is now ready to print for those individuals assigned that Preferred Language.



Edit a Saved Letter

1. Navigate to *Ad Hoc Reporting > Letter Designer*.
2. In the **Saved Letter Formats** box, click on the letter to edit. Any letter saved to a group will display under the group name – click on the + next to the group to display all the shared letters.

3. Click on the <Edit> button.



4. The letter will display. Edit the letter as needed.
5. Click on the <Save Format> button to save changes.

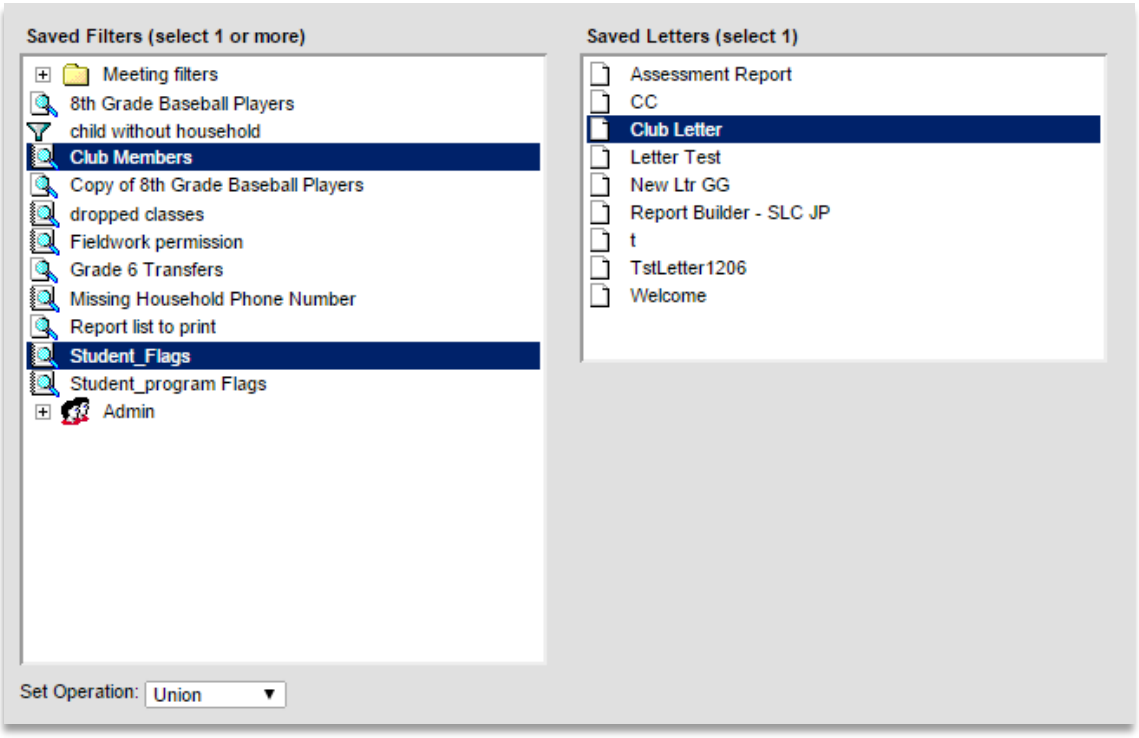
Delete a Letter

1. Navigate to *Ad Hoc Reporting* > *Letter Designer*.
2. In the **Saved Letter Formats** box, click on the Letter to delete. Any Letter saved to a group will display under the group name – click on the + next to the group to display all the shared letters.
3. Click on the <Delete> button.
4. A warning will display, giving the user a chance to reconsider. (Once deleted, a letter cannot be restored.) Click on the <OK> button to delete the letter, or <Cancel> to retain the letter.

Letter Builder

The Ad Hoc *Letter Builder* is used to mass print the letters created in Ad Hoc Letter Designer. This will merge the fields placed in the letters with information specific to the students designated by the selected filters. When the *Letter Builder* is run, the letters can be printed immediately or saved to be printed at a later date.

1. Navigate to *Ad Hoc Reporting* > *Letter Builder*.
2. In the **Saved Filters** box, click on the filter(s) needed. More than one filter can be chosen. Any filter saved to a group will display under the group name – click on the + next to the group to display all the shared filters. At least one filter must be chosen.
3. In the **Saved Letter** box, click on the letter needed. More than one filter can be selected, but only one report can be chosen.



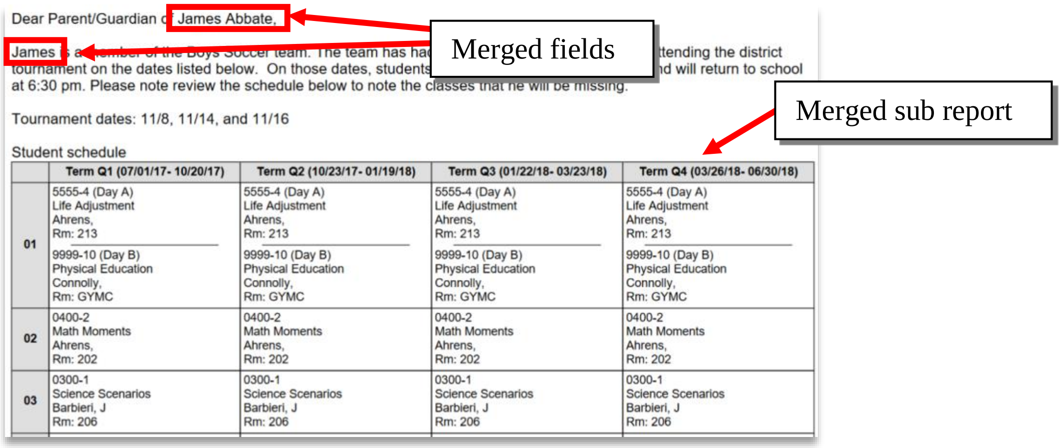
4. *Set Operation* – If more than one filter is chosen, the *Set Operation* field must be used. The default is 'Union' (if only one filter is chosen, the choice in this field won't change the functionality).

   Union – this option will choose all the students from all the filters chosen. For example, if choosing the *Chess Club* filter and the *Student_Flags* filter, a letter will be produced for any student in the chess club **or** any student with free lunch.

   Intersection – this option will choose only the students who are in *all* the filters chosen. For example, if choosing the *Chess Club* filter and the *Flagged_students* filter, a letter will be produced for only those students in the chess club who also have a Program flag. i.e., If 10 students are in the chess club and only three of them have a Program flag, only letters for those three students will be produced. (It may be more than three letters if the household is split. See Step 9 below.)

5. *Sort Options* – choose the sort option needed.
6. Click on the <Build Letters> button.
7. This will produce a PDF document of all the letters generated, based on the list of students in the selected Filters.
8. Note the letters will merge the student's name / information into the fields inserted into the letter.

9. If a student is in split household with each guardian retaining Guardianship and Mailing, one letter for each household will be generated.
10. These letters can be printed immediately or saved for printing at a later time.



Dear Parent/Guardian of James Abbate,

James is a member of the Boys Soccer team. The team has ha... tending the district tournament on the dates listed below. On those dates, students... nd will return to school at 6:30 pm. Please note review the schedule below to note the classes that he will be missing.

Tournament dates: 11/8, 11/14, and 11/16

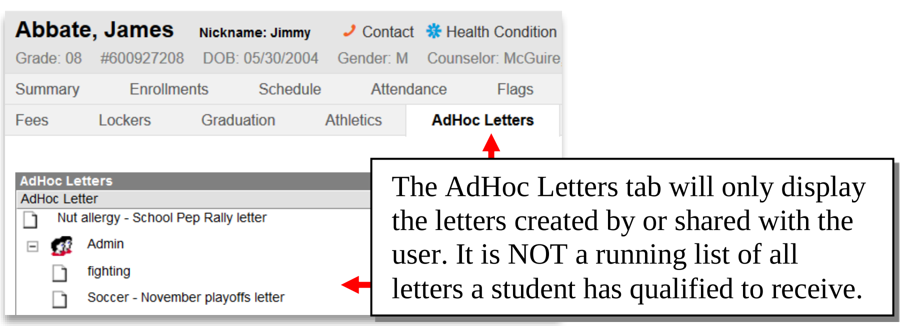
Student schedule

	Term Q1 (07/01/17- 10/20/17)	Term Q2 (10/23/17- 01/19/18)	Term Q3 (01/22/18- 03/23/18)	Term Q4 (03/26/18- 06/30/18)
01	5555-4 (Day A) Life Adjustment Ahrens, Rm: 213 9999-10 (Day B) Physical Education Connolly, Rm: GYMC	5555-4 (Day A) Life Adjustment Ahrens, Rm: 213 9999-10 (Day B) Physical Education Connolly, Rm: GYMC	5555-4 (Day A) Life Adjustment Ahrens, Rm: 213 9999-10 (Day B) Physical Education Connolly, Rm: GYMC	5555-4 (Day A) Life Adjustment Ahrens, Rm: 213 9999-10 (Day B) Physical Education Connolly, Rm: GYMC
02	0400-2 Math Moments Ahrens, Rm: 202	0400-2 Math Moments Ahrens, Rm: 202	0400-2 Math Moments Ahrens, Rm: 202	0400-2 Math Moments Ahrens, Rm: 202
03	0300-1 Science Scenarios Barbieri, J Rm: 206	0300-1 Science Scenarios Barbieri, J Rm: 206	0300-1 Science Scenarios Barbieri, J Rm: 206	0300-1 Science Scenarios Barbieri, J Rm: 206

Viewing/Printing a Single Student's Letter, Using the Ad Hoc Letters Tab

The letter created in the *Ad Hoc Reporting > Letter Builder* module is also saved in the individual student's **AdHoc Letters** tab.

1. Navigate to *Student Information > General* module, **AdHoc Letters** tab.
2. Search for and select the student.
3. To view/print the letter, select the report, then click the <Print> button. This will produce a PDF document of the letter generated. These letters can be printed immediately or saved for printing at a later time.



Special Note:
Only the letters created by the user or shared with the user will display. Therefore, other users will not be able to view or print confidential information. Any report saved to a group will display under the group name. Letters displayed on the tab are not indicative of ones the student has qualified to receive. The list is all letters the user has access to through Ad Hoc Letter Designer.

DATA ANALYSIS

Description

The Data Analysis tool analyzes Campus data and allows users to measure student progress as well as understand and visually present school, district and state-wide performance data. This tool allows users to cross-reference student information by dimension and produce visual results of this data.

Student demographic data can be cross-referenced with attendance records, behavior incidents, grades, and Special Education status. This data can then be visually produced on a grid, bar chart, line chart or pie chart, facilitating comparison and analysis.

Data Analysis uses pivot table functionality. A pivot table is a data summation tool often found in spreadsheets and other business intelligence software. Pivot table tools can sort, count and total the data stored in a table or spreadsheet, then display the data in a new table in real time.

> **Special Note:**
> It is recommended that the Data Analysis tool be used with the Firefox Browser. Users will also need to install Adobe Flash Player in order to display results.

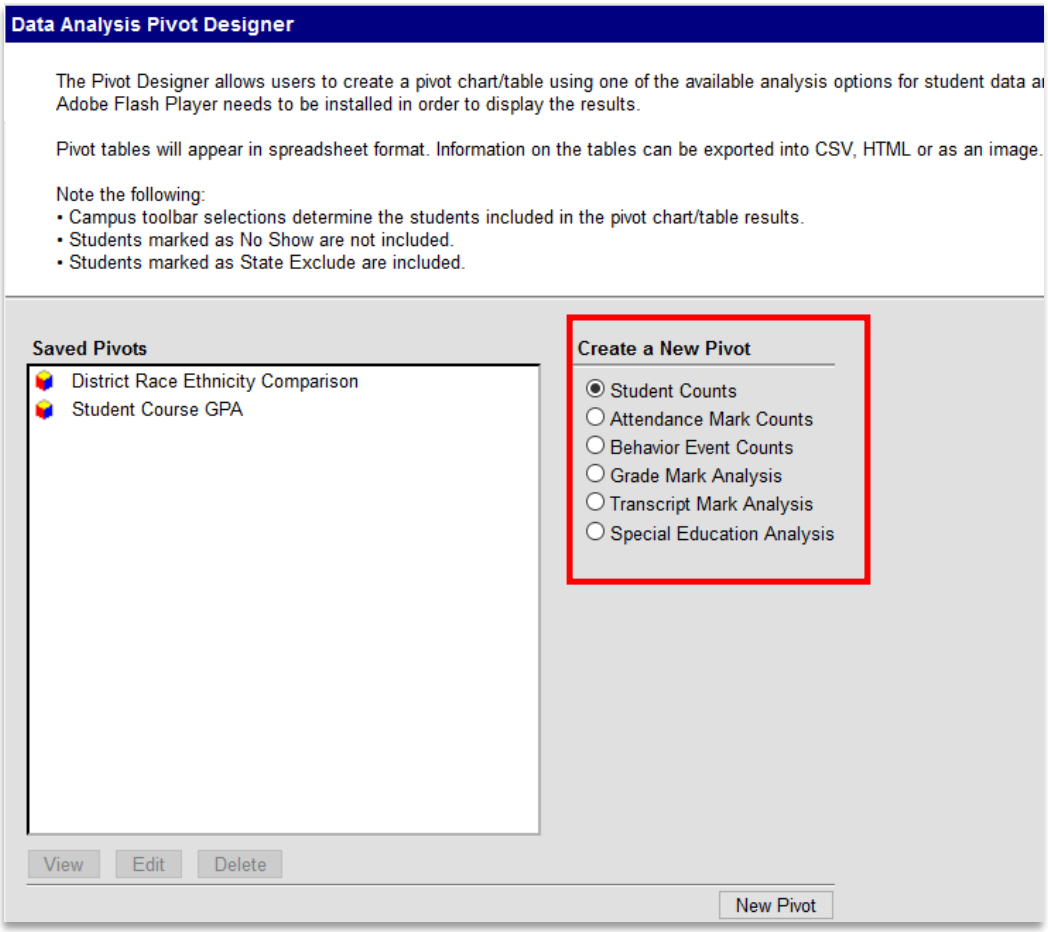
Pivot Options

Users can create different pivots depending on their needs.

1. Navigate to *Ad Hoc Reporting > Data Analysis*.
2. In the Data Analysis Pivot Designer, Create a New Pivot from the radio options available.
3. Some measures will apply to every pivot created.
   - No show students are not included.
   - Students marked as State Exclude are included.
   - Counts will report as the default measure on the field list.
4. Below are descriptions of Pivot Type Options.
   - **Student Counts** are based on total number of students enrolled.
   - **Attendance Mark Counts** are based on student attendance records. Students must appear on a roster and have at least one attendance event. Each attendance event displays as one count.
   - **Behavior Event Counts** are based on student behavior records. Each behavior event displays as one count.
   - **Grade Mark Counts** are based on Total Number of Students Enrolled + GPA + Credits Earned. In this pivot, the GPA is derived from the Grades tab

(Weighted Term GPA), and the Credits Earned is based on information on the Transcript tab. Each credit displays as one count.

- **Transcript Mark Counts** are based on student transcript information. Student must have transcript credit on the Transcript tab to display. Each posted transcript credit displays as one count. In this pivot, the Transcript GPA is the default.
- **Special Education Analysis** is based on students with a special education record. Student must have a locked IEP in order to report.

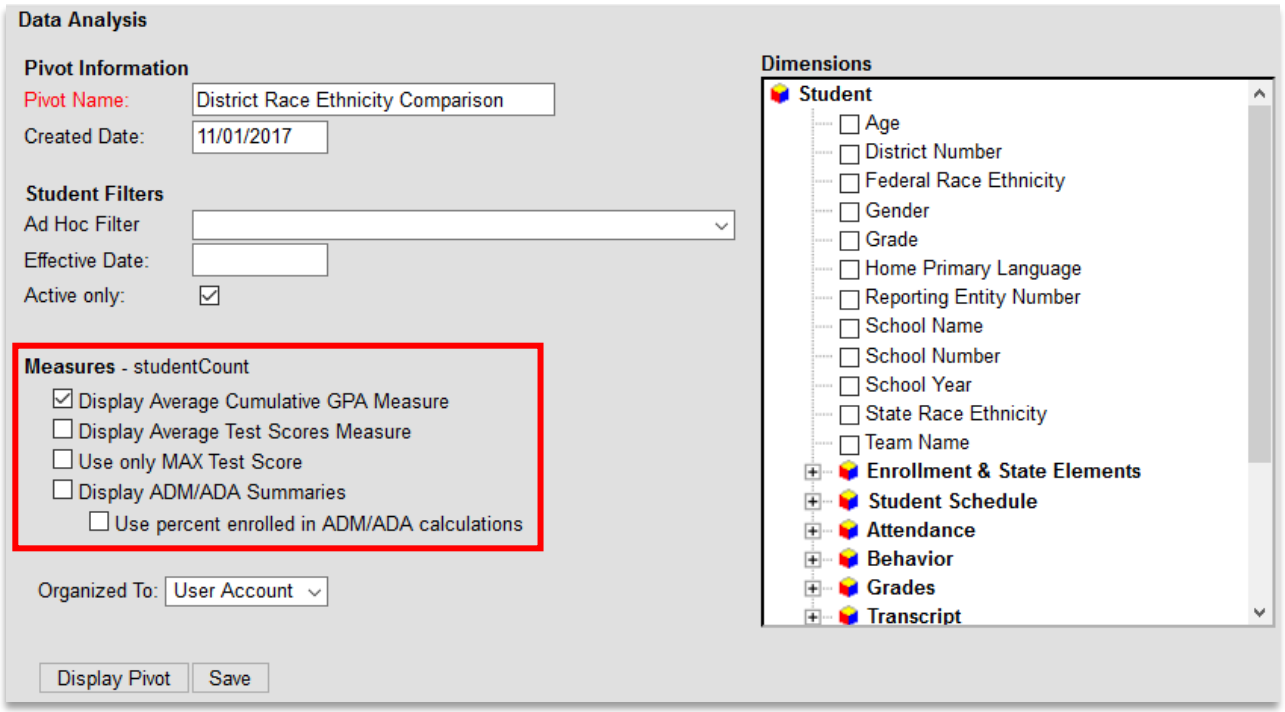


Data Analysis Pivot Details

After selecting the desired pivot type, users can enter additional details to analyze the data.

1. Users must enter a *Pivot Name*. This is a required field for identification.
2. Users can enter a *Created Date*.
3. Users can select an 'Ad Hoc Filter' from the dropdown to narrow the data used.

4. Entering an *Effective Date* will include students who are actively enrolled as of the entered date. Marking 'Active Only' will cause the pivot to only return data for students who are actively enrolled on the effective date entered.
5. Select Measures for student counts if appropriate.
    a. **Display Average Cumulative GPA Measure** will display the Average Cumulative GPA for all reported students.
    b. **Display Average Test Scores Measure** will display students' average test scores.
    c. **Use only MAX Test Score** will display the students' highest test score.
    d. **Display ADM/ADA Summaries** show the Average Daily Membership and Average Daily Attendance. This feature will only be available for 'Student Counts' pivots.
        - **Use percent enrolled in ADM/ADA calculations** is used to determine which views are used for calculating ADM/ADA or whether or not Percent Enrolled is taken into account.



6. A pivot can be 'Organized To' the User Account or to a User Group as appropriate.

Data Analysis Dimensions

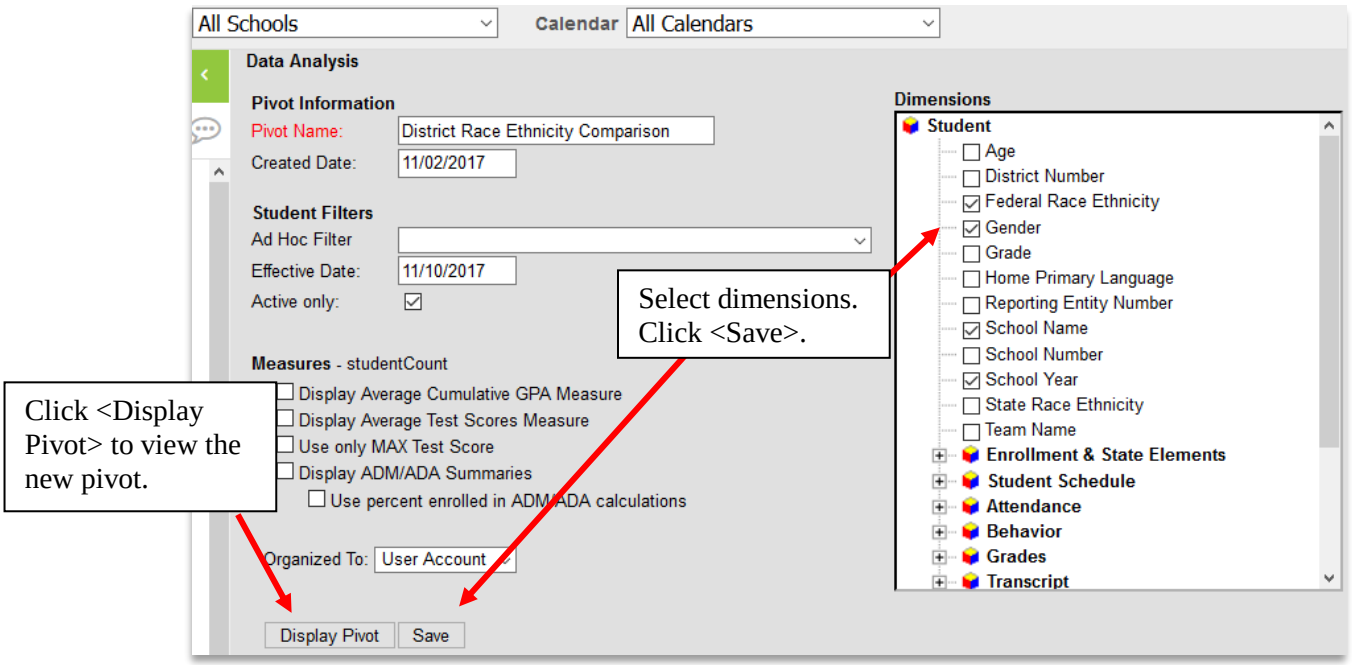
Dimensions allow users to specify the data source from which data will be pulled into the pivot table. Users must select at least two dimensions in order to use a pivot. Users can open the (+) next to Dimensions to determine the data they wish to analyze. There may

be state-specific or reporting entity-specific fields available for some users. Depending on the database setup, users may also pull in information from custom tabs and fields.

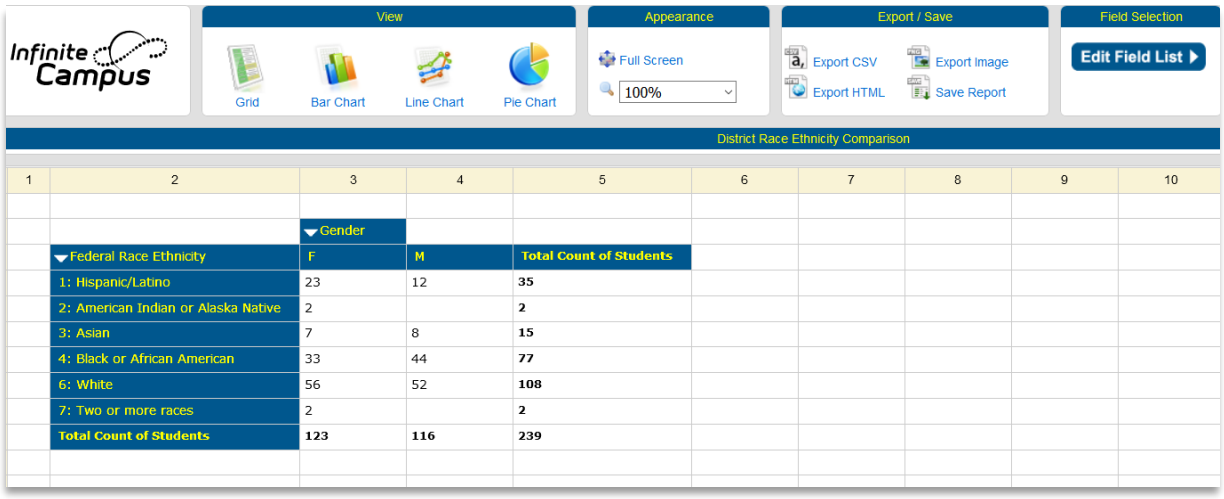
> **Special Note:**
>
> If 'All Years' and 'All Schools' are selected in the Campus toolbar dropdowns, the <School Name> and <School Year> dimensions must be checked in order for the pivot to display correct data.

Creating a Pivot Table

1. Navigate to *Ad Hoc Reporting > Data analysis*.
2. Click on the <Student Counts> radio button under Create a New Pivot.
3. Enter a *Pivot Name*. This should be fairly descriptive so that it can be easily located.
4. If the date is not entered, the *Created Date* will automatically populated with the current date upon saving.
5. If desired, select an 'Ad Hoc Filter' from the dropdown list.
6. Enter an *Effective Date*. Mark the <Active Only> checkbox, if desired.
7. Select the appropriate Measures and Dimensions. Click <Save>.
8. Click <Display Pivot> to view the new pivot.

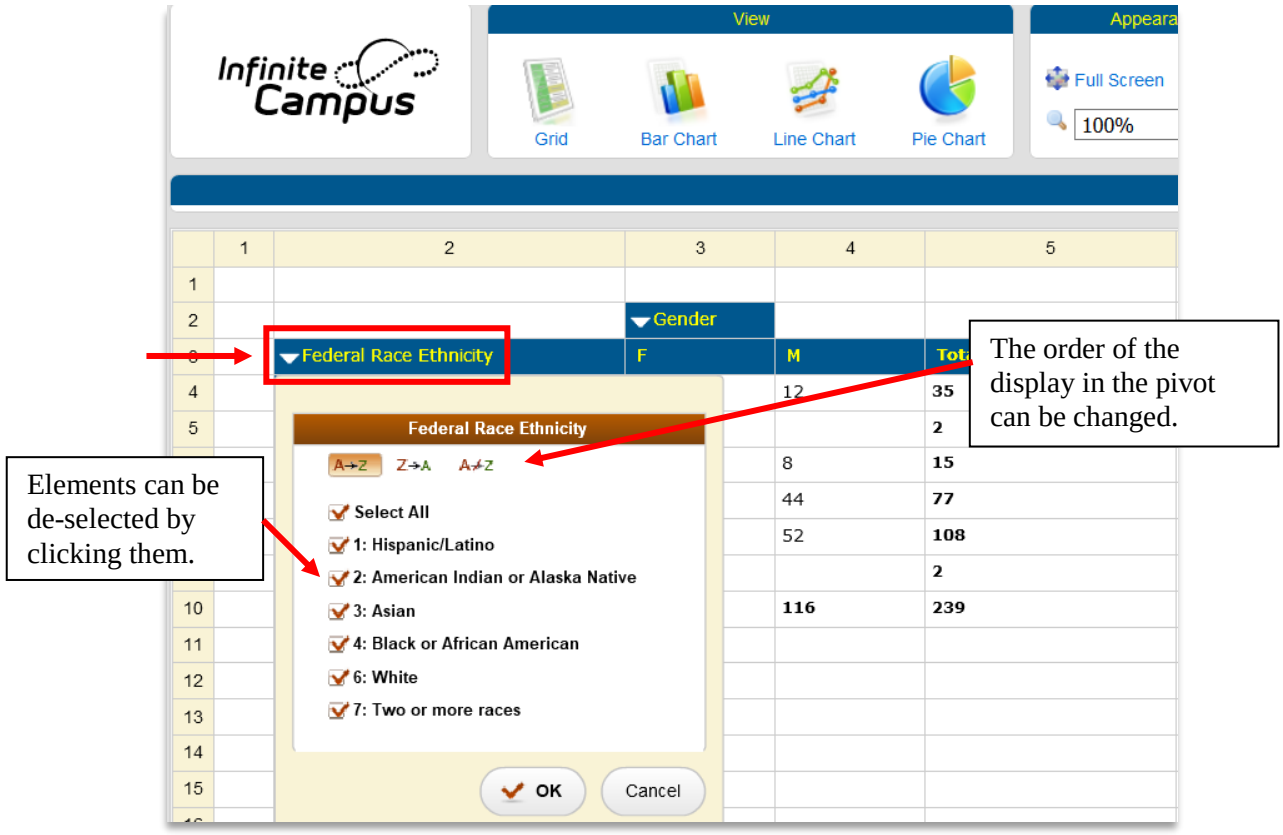


9. Pivot will display in a new window.

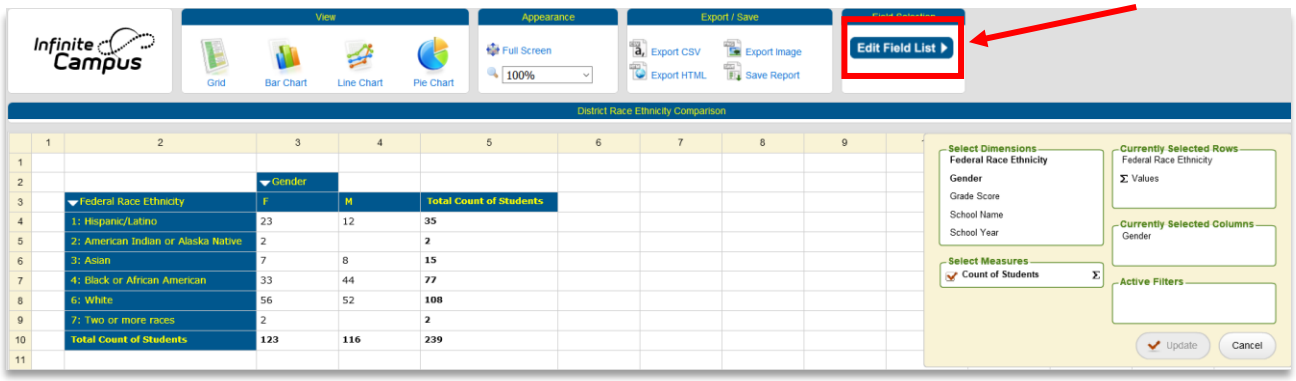


	Gender		
Federal Race Ethnicity	F	M	Total Count of Students
1: Hispanic/Latino	23	12	35
2: American Indian or Alaska Native	2		2
3: Asian	7	8	15
4: Black or African American	33	44	77
6: White	56	52	108
7: Two or more races	2		2
Total Count of Students	123	116	239

10. By default, only two dimensions will display. A breakdown of the dimensions can be viewed by clicking on the white arrow next to a column or row header. The order of the display can be changed (ascending, descending, user defined) and elements can be de-selected by clicking them off as needed from this view. Click <OK> to save.



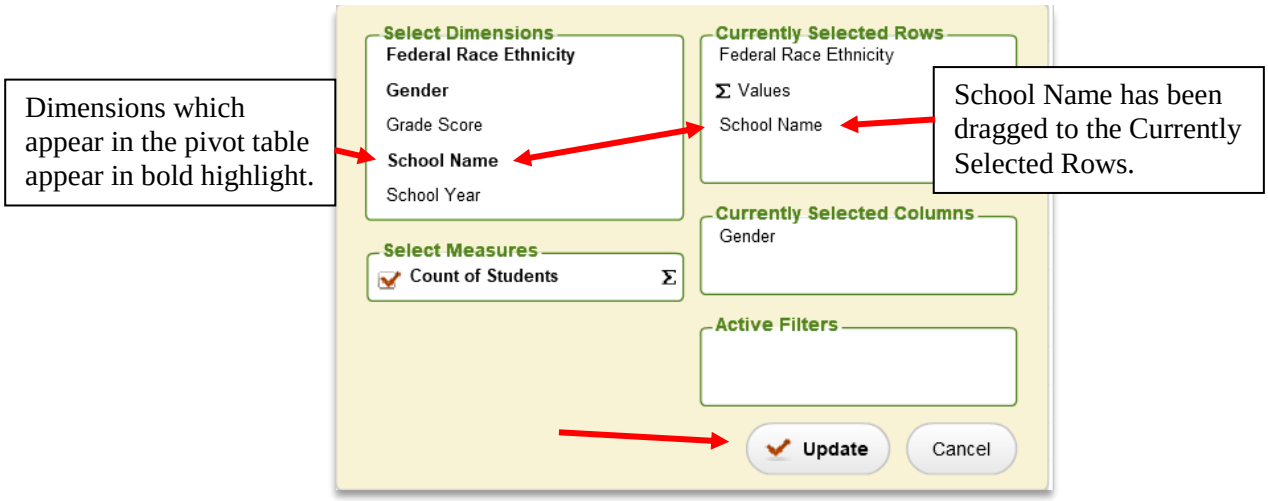
11. One important feature of the Data Analysis tool is the ability to freely move and remove dimensions from columns and rows. To modify the pivot table dimensions, click on the <Edit Field List> button.



12. An editor will appear displaying all available dimensions (based on dimensions originally selected when creating the pivot) as well as applied Measures and Active Filters. The dimensions currently appearing in the pivot appear in **bold** in the Select Dimensions window.

13. To add a dimension to a row or column, click and drag the dimension into the **Currently Selected Rows, Currently Selected Columns** or **Active Filters** sections.

14. Once all dimensions have been moved accordingly, select the **Update** button to apply these changes to the pivot table.

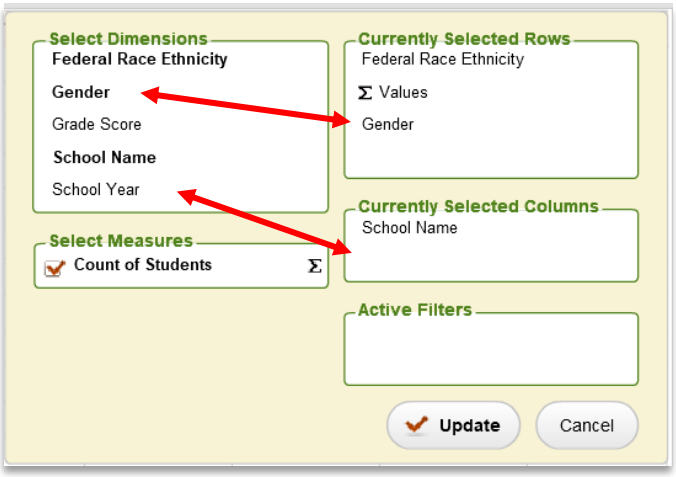


3. The changes will be reflected in an updated pivot table. The new pivot table now displays the Federal Race Ethnicity data by school if the pivot table is expanded by clicking the (+) next to each specific Federal Race Ethnicity.

When the (+) is expanded, the Federal Race Ethnicity displays by school.

	1	2	3	4	5
1					
		Federal Race Ethnicity	Gender		
		School Name	F	M	Total Count of Students
		− 1: Hispanic/Latino	23	12	35
		Angliss Elementary School	3	2	5
		Baylor High School	20	10	30
7		+ 2: American Indian or Alaska Native	2		2
8		− 3: Asian	7	8	15
9		Angliss Elementary School	2	8	10
10		Baylor High School	5		5
11		+ 4: Black or African American	33	44	77
12		+ 6: White	56	52	108
13		+ 7: Two or more races	2		2
14		Total Count of Students	123	116	239

4. Likewise, users can also change the display so that the schools appear in the columns and student gender appears in a row.



When the (+) is expanded, the Federal Race Ethnicity displays by gender.

	1	2	3	4	5
1					
2		Federal Race Ethnicity	School Name		
3		Gender	Angliss Elementary School	Baylor High School	Total Count of Students
4		− 1: Hispanic/Latino	5	30	35
		F	3	20	23
		M	2	10	12
		+ 2: American Indian or Alaska Native		2	2
		+ 3: Asian	10	5	15
		+ 4: Black or African American	25	52	77
		+ 6: White	49	59	108
11		+ 7: Two or more races		2	2
12		Total Count of Students	89	150	239

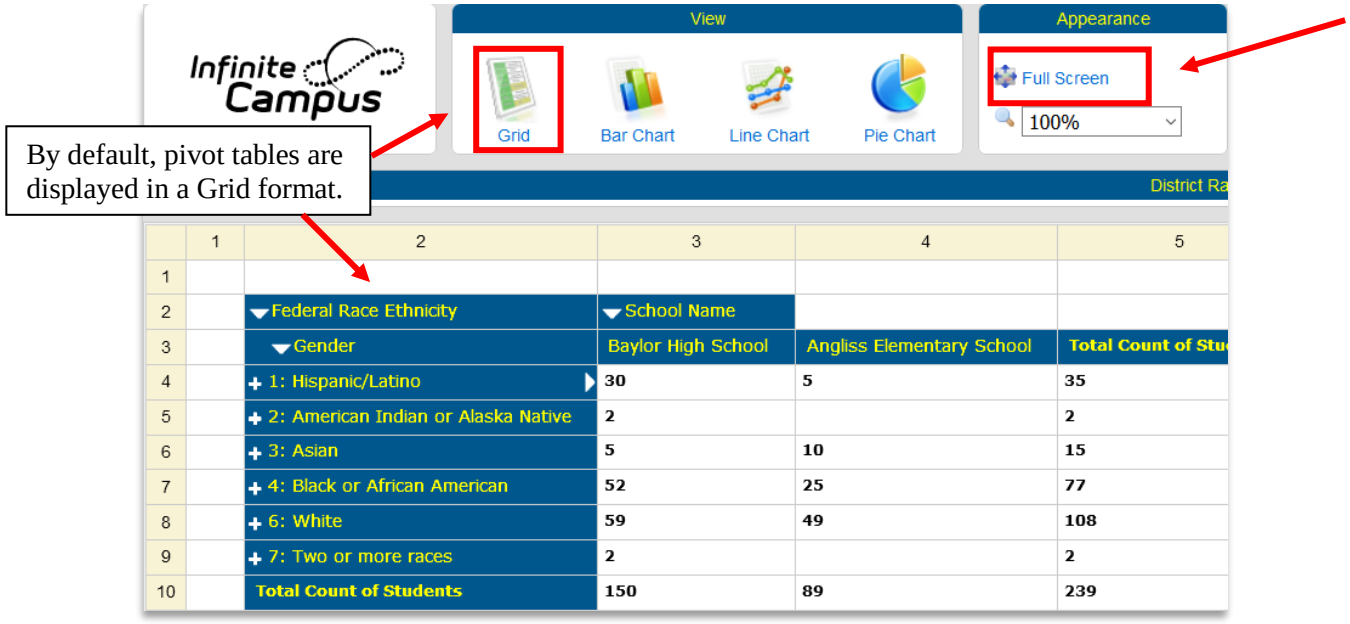
5. Users can also sort the data by column by clicking on the triangle. Selecting will sort the columns or rows by ascending value. Selecting the will sort the rows and columns by descending value.

	1	2	3	4	5
1					
2		Federal Race Ethnicity	School Name		
3		Gender	Baylor High School	Angliss Elementary School	Total Count of Students
4		+ 1: Hispanic/Latino	30	5	35
5		+ 2: American Indian or Alaska Native	2		2
6		+ 3: Asian	5	10	15
7		+ 4: Black or African American	52	25	77
8		+ 6: White	59	49	108
9		+ 7: Two or more races	2		2
10		Total Count of Students	150	89	239

Data Visualization Options

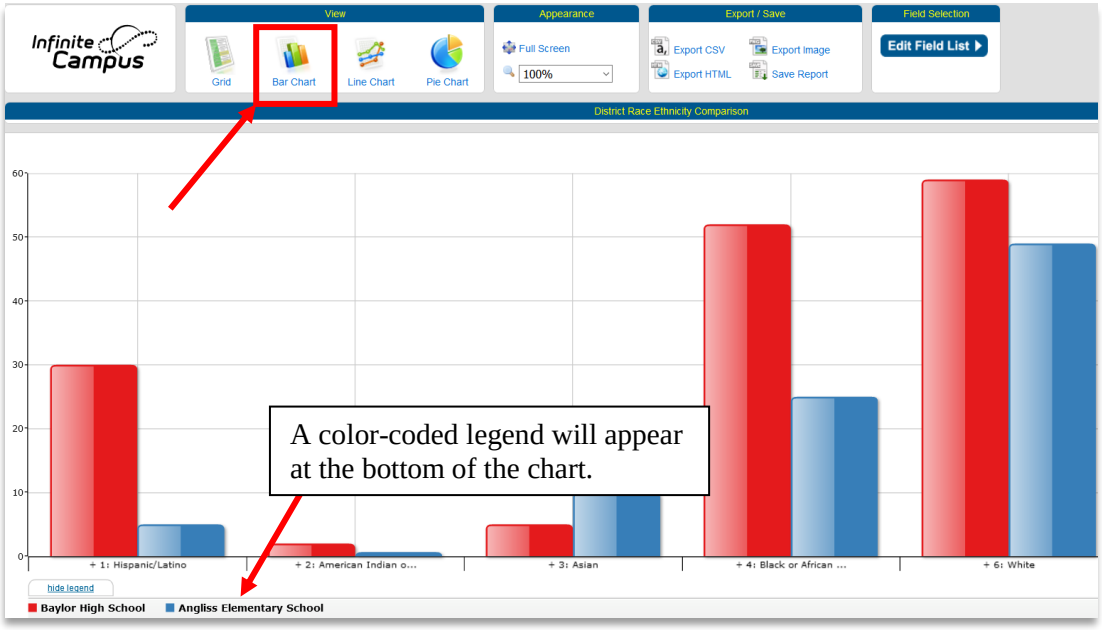
Users can display pivot table data in several formats depending on user needs. Options include **Grid**, **Bar Chart**, **Line Chart**, and **Pie Chart**.

1. Clicking on the <Full Screen> button in the Appearance section at the top of the screen is useful for presentation purposes in all formats, but does not allow users to modify the pivot table. Users can exit full screen mode, by using the <Esc> key.
2. **Grid**: The default Grid format is a spreadsheet-like presentation of data and also serves as the format for manipulating and organizing and manipulating dimensions, filters, and measures.

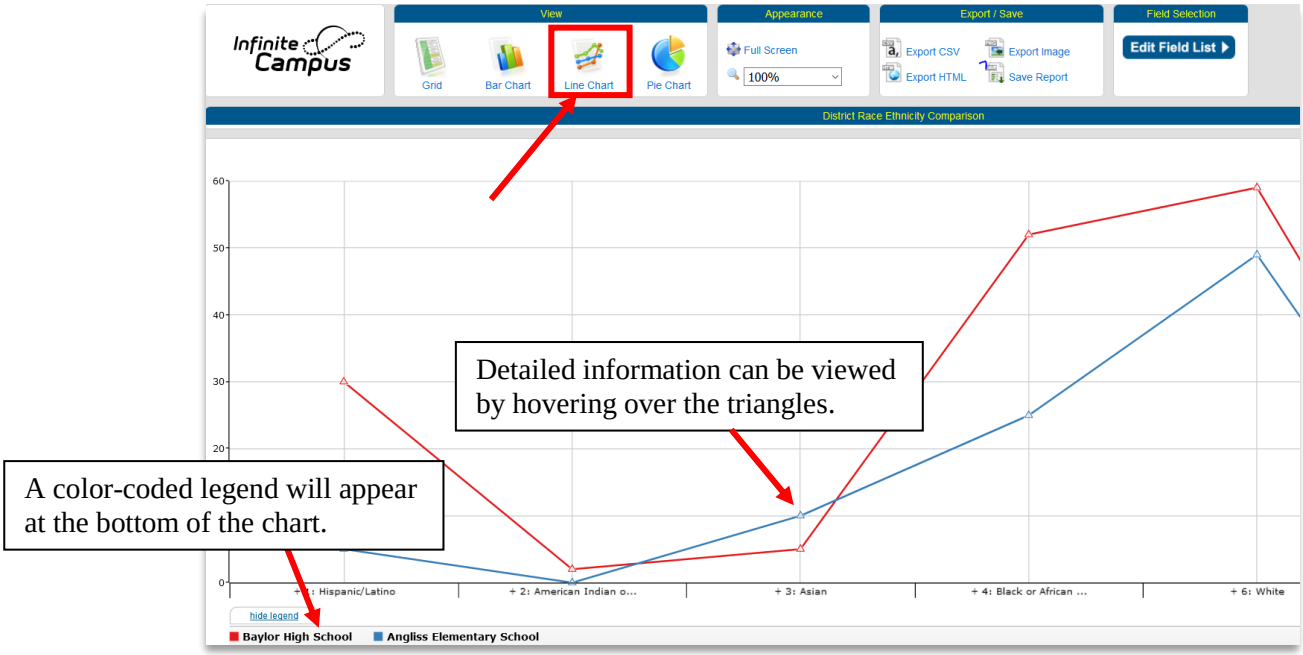


	1	2	3	4	5
1					
2		Federal Race Ethnicity	School Name		
3		Gender	Baylor High School	Angliss Elementary School	Total Count of Stu
4		+ 1: Hispanic/Latino	30	5	35
5		+ 2: American Indian or Alaska Native	2		2
6		+ 3: Asian	5	10	15
7		+ 4: Black or African American	52	25	77
8		+ 6: White	59	49	108
9		+ 7: Two or more races	2		2
10		Total Count of Students	150	89	239

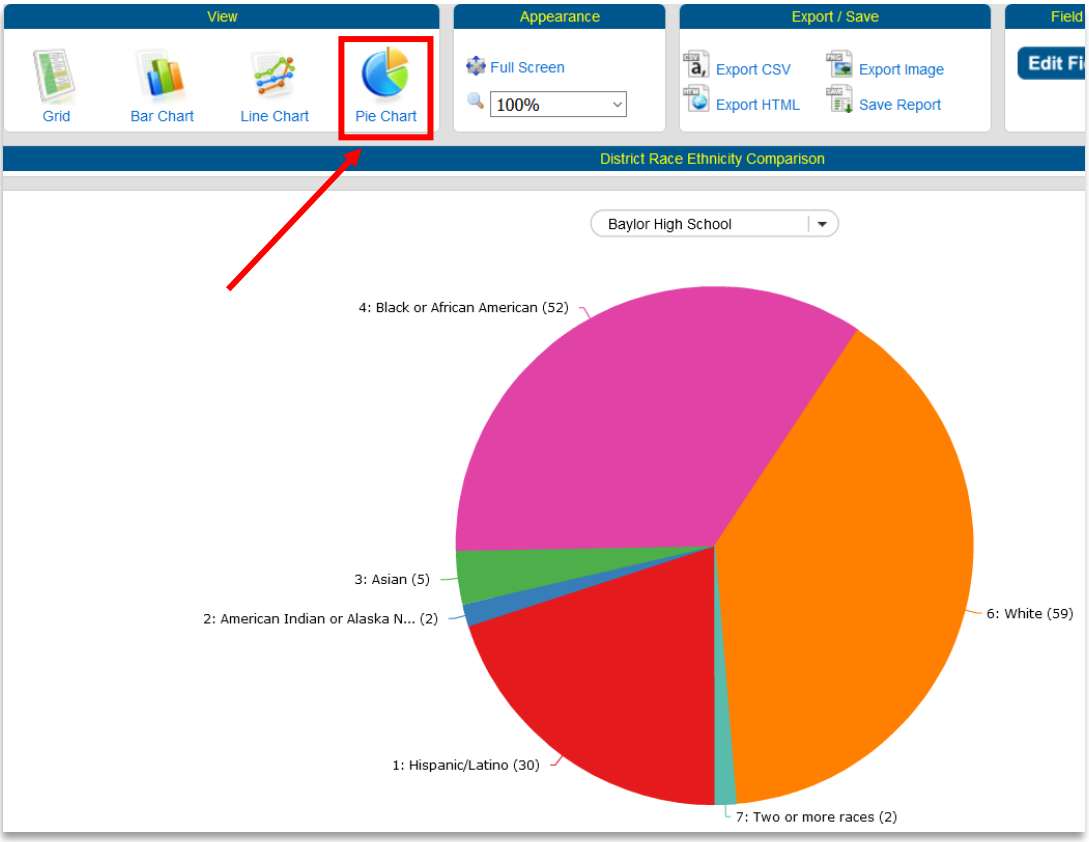
3. **Bar Chart**: Pivot table data can be displayed in a Bar Chart format by clicking on the <Bar Chart> icon. Detailed information on the column or row can be viewed by hovering the mouse cursor over the bar.



4. **Line Chart**: Pivot table data can be displayed in a detailed Line Chart format by clicking on the <Line Chart> icon. Detailed information can be viewed by hovering the mouse cursor over the triangle or the corresponding color and line.

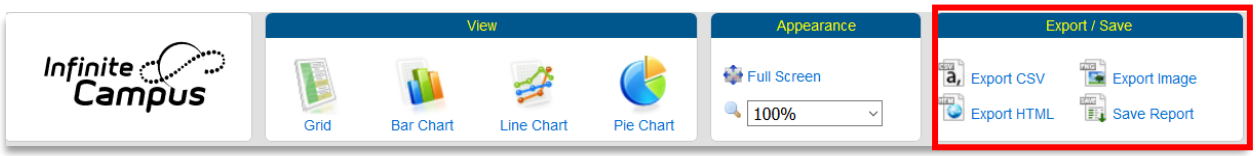


5. **Pie Chart**: Pivot table data can also be displayed in a detailed Pie Chart format by clicking on the <Pie Chart> icon at the top of the screen. Detailed information for Baylor High School can be viewed by hovering over the individual pie slice.



Exporting and Saving Data and Images

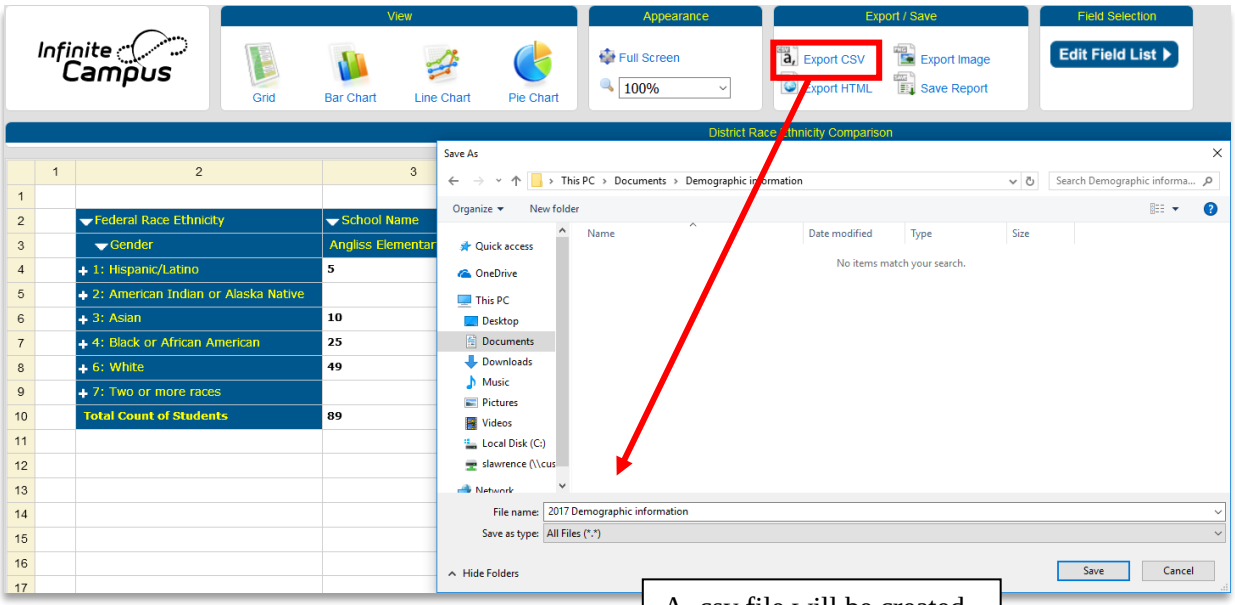
Pivots contain all data from the *Effective Date* entered on the Data Analysis editor to the current date. As a result, it is not possible to do a comparative historical analysis of data. Exporting data will facilitate comparative data analysis. Users have the ability to export pivot data into html or .csv format or save the exact organization and data within a pivot. Images can be exported as .png files.



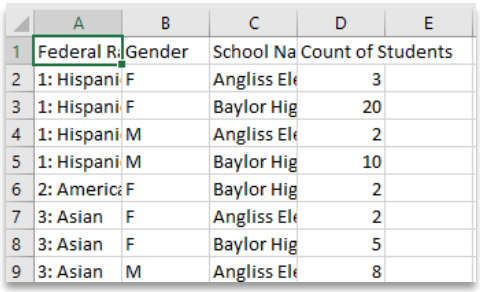
1. **Save Report**: The organizational layout of a pivot can be saved by selecting the <Save Report> button. A new pivot will appear in the Saved Pivots window, allowing users to access the pivot in the desired layout.
    a. Enter a report name in the pop-up box.
    b. Click <OK> button.

Users should always save a Pivot Name when creating a pivot. If a Pivot Name has not been saved in the Data Analysis editor, the <Save Report> button will not be available.

2. **Export CSV**: Users can export the data from a pivot for comparative historical analysis, by selecting <Export CSV>.
    a. Click on <Export CSV>.
    b. Enter a report name and a file destination in the pop-up box.
    c. Click <Save>.
    d. A .csv file will be created.



A .csv file will be created that can be converted to an Excel file.

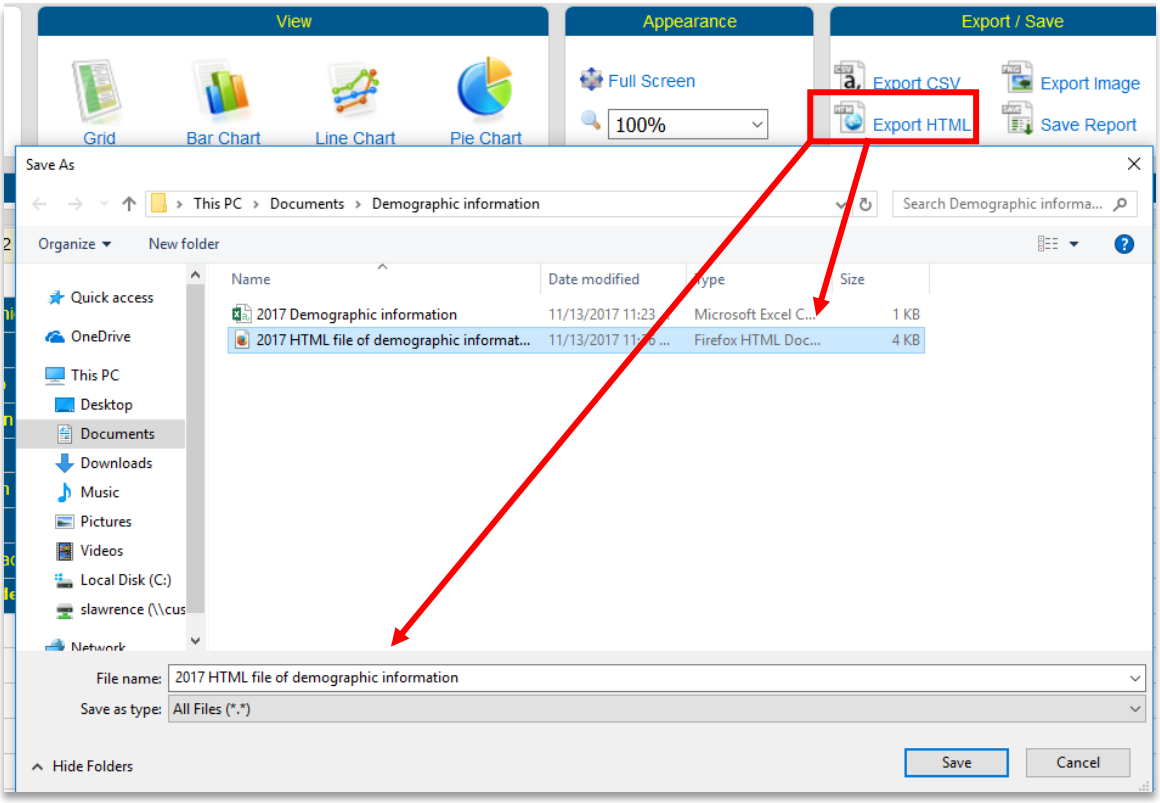


	A	B	C	D	E
1	Federal R	Gender	School Na	Count of Students	
2	1: Hispani	F	Angliss Ele	3	
3	1: Hispani	F	Baylor Hig	20	
4	1: Hispani	M	Angliss Ele	2	
5	1: Hispani	M	Baylor Hig	10	
6	2: Americ	F	Baylor Hig	2	
7	3: Asian	F	Angliss Ele	2	
8	3: Asian	F	Baylor Hig	5	
9	3: Asian	M	Angliss Ele	8	

    e. Save as an Excel file to work with data.

3. **Export HTML**: Users can export data from a pivot to an html file.
    a. Click on <Export HTML>.
    b. Enter a report name and a file destination in the pop-up box.
    c. Click <Save>.

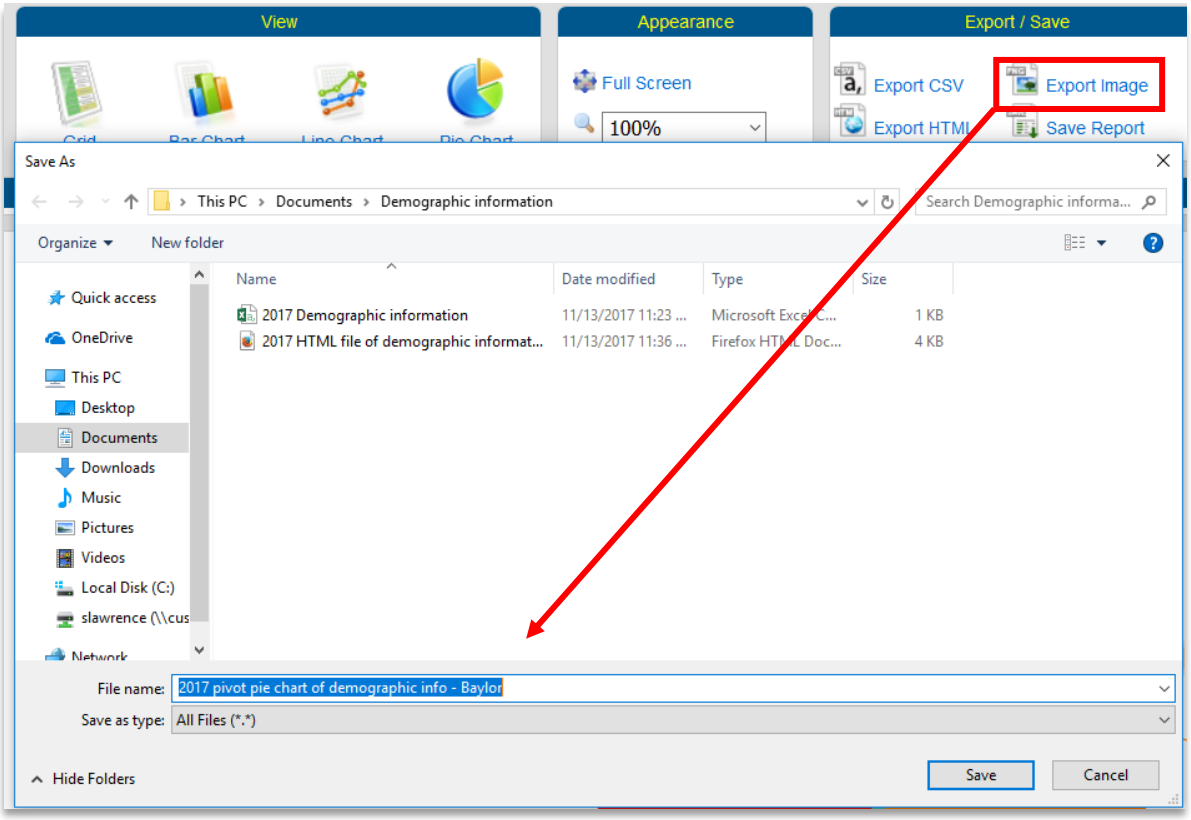
d. An html file will be created.



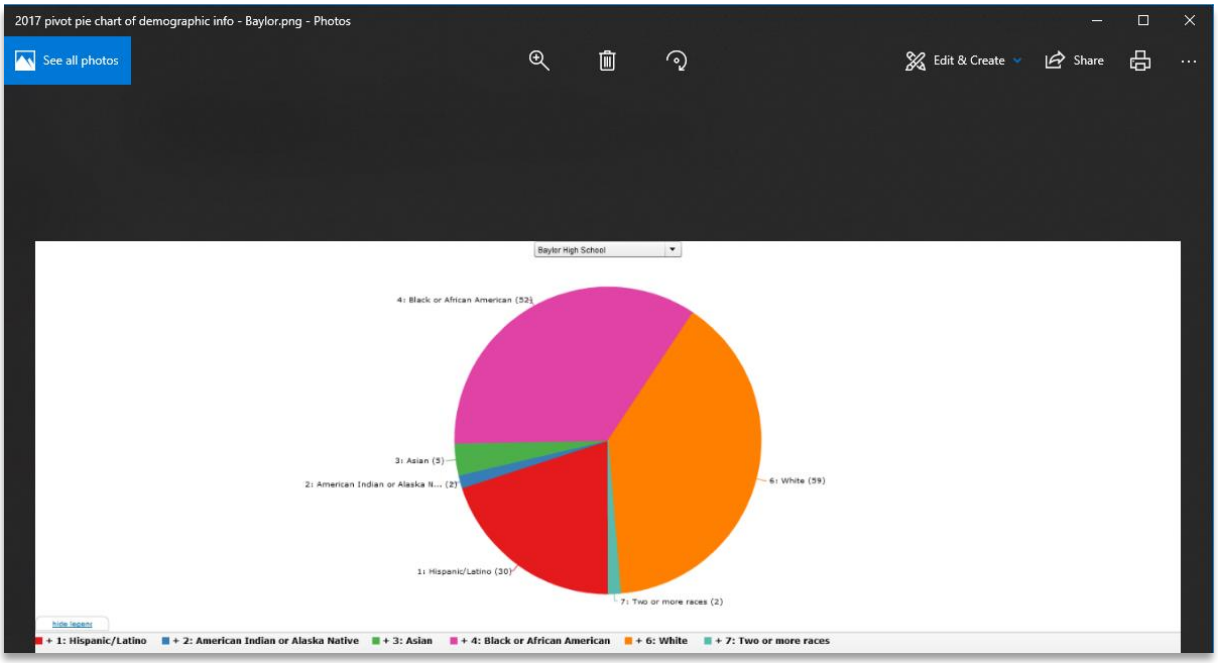
View of html file created.

	Angliss Elementary School	Baylor High School	Total Count of Students
+ 1: Hispanic/Latino	5	30	35
+ 2: American Indian or Alaska Native		2	2
+ 3: Asian	10	5	15
+ 4: Black or African American	25	52	77
+ 6: White	49	59	108
+ 7: Two or more races		2	2
Total Count of Students	89	150	239

4. **Export Image**: Users may wish to export an image for a report. Images saved will appear exactly as shown on the screen.
    a. Click on <Export Export Image>.
    b. Enter image name and a file destination in the pop-up box.
    c. Click <Save>. An png file will be created.



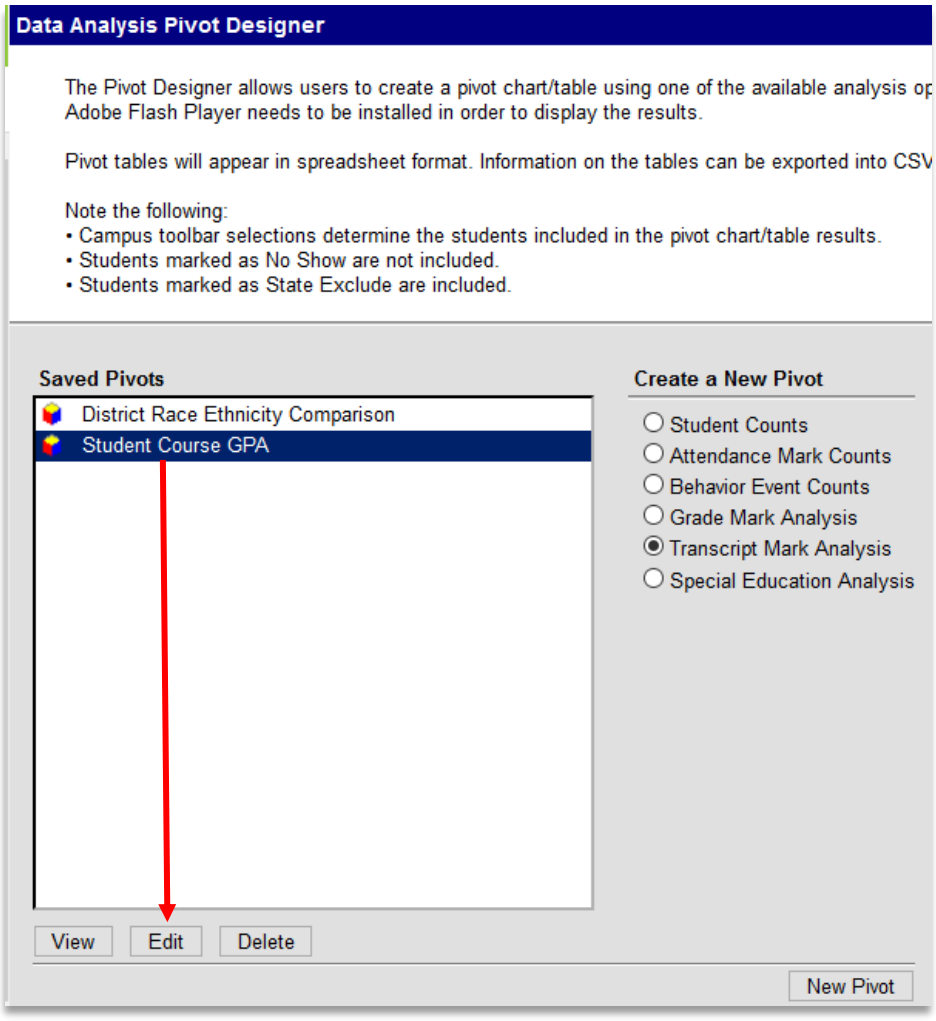
View of .png image created.



Editing Pivots

Users can edit an existing pivot.

1. Navigate to *Ad Hoc Reporting* > *Data Analysis*.
2. Select an existing pivot to edit.
3. Click the <Edit> button.
4. Users are directed to the Data Analysis editor where changes can be made to the dimensions.
5. Users can save the modified pivot by clicking on the <Save> button.

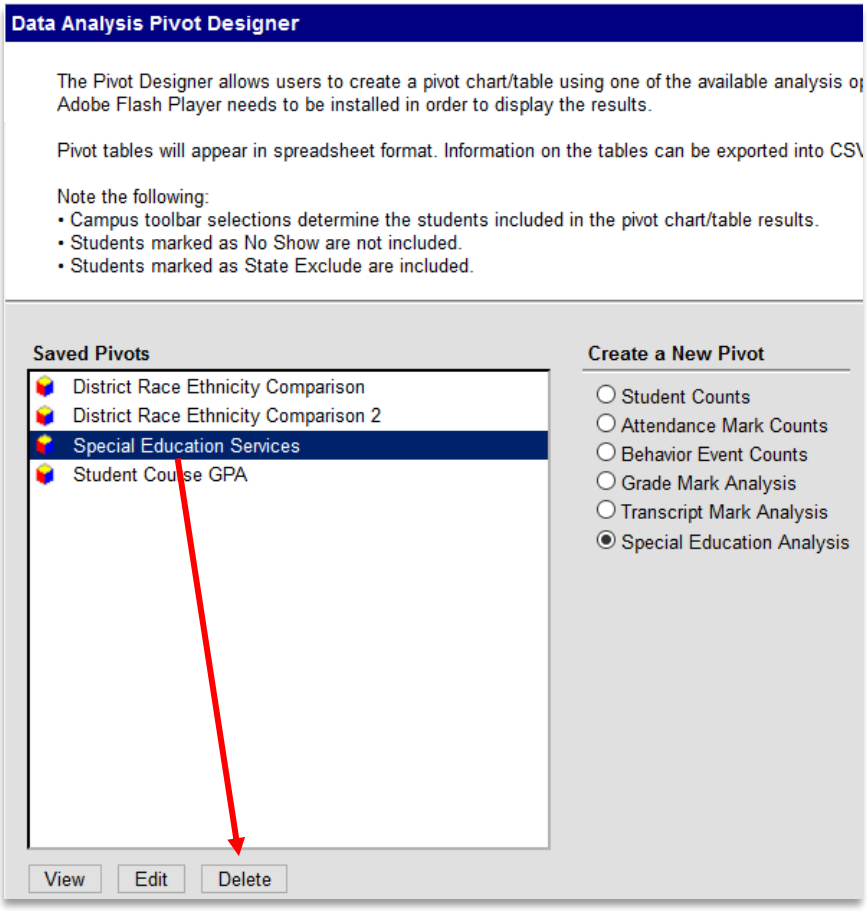


Deleting a Pivot

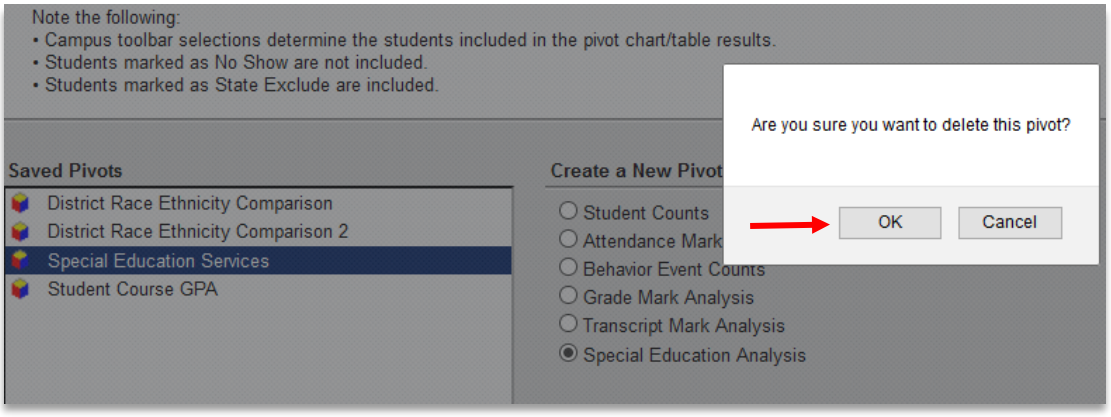
Users can edit an existing pivot.

1. Navigate to *Ad Hoc Reporting* > *Data Analysis*.
2. Select an existing pivot to delete.

3. Click the <Delete> button.



4. Users will receive a warning message. Click <OK> to delete the pivot.



APPENDIX A: Finding Data in Infinite Campus

Troubleshooting Problems

- **If an Ad Hoc Report returns no data, the most common errors are:**
  - Check the Campus toolbar settings. The correct school may not have been selected.
  - Entering data in a format that the program cannot read (studentGrade = 7 when the grades in this school are entered as two digits in a text field (i.e., studentGrade = 07).
  - The fields selected may exist. If the user connects to a field that holds a student's program flag – spProgram.Name – and students have not been assigned a program or flag, the user will not get any results.
  - Selecting multiple fields with multiple operators that may be at cross-purposes and may limit the possible returns or eliminate any returns. When a user first starts, less can be more until the data fields are identified. If the user creates a filter with student.lastName, student.firstName, student.grade and no operators, every student in the system will be returned. Adding fields and operators by testing fields and operators first may help to identify the desired returned data. See Learning which data fields matter below.

Learning Which Data Fields Matter

Learning which fields to use in an Infinite Campus Ad Hoc Query Wizard can be a daunting task. Here are a few tips to consider.

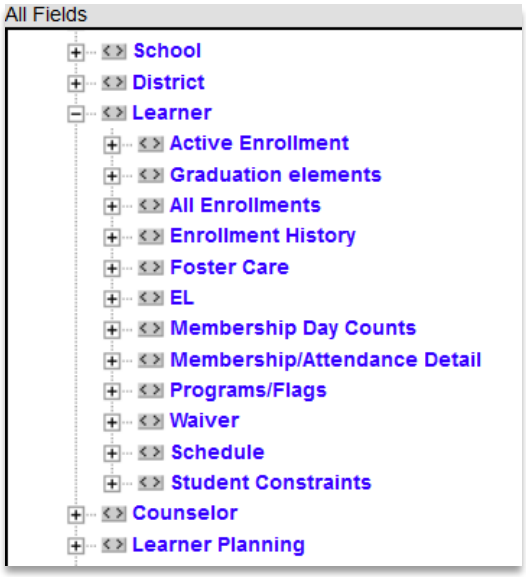
- **Look in Infinite Campus** – Before creating the filter/report, use Infinite Campus to find where the fields are physically located on the system's tabs. (i.e., find a student with the criteria needed [food allergy, free lunch, excessive tardiness, etc.]; find a course with the criteria needed [English courses]).
- **Document the tab names and data labels –** Note the names that display next to the field on the screen. Check the tabs on which the fields are located, and the module which contains those tabs. When creating a new Filter, use the **Filter By** search in **Select categories & fields** to find field names. *While they are not the actual name of the data field, the programmer may have chosen a field name similar to the label!*
- **Run a test WITHOUT filtering** – Test the filter/report before entering the criteria (and look for the information displayed). Match this data to the information found in the step above.
- **Choose nearby fields that MIGHT work to discover what they hold** – When choosing the fields in the first Query Wizard screen, select any field within the same view that might display the information needed. Then compare the information retrieved when the filter is run. The user should be able to see which

field name goes with the field label in the tab this way. Unwanted fields can then be removed by editing the filter.

- **A field with a suffix of 'ID' is rarely helpful in the Query Wizard** – it is a primary key, a unique number the computer uses to internally name the item.
- **A field called Name is often the right field –** While *Name* seems nondescript, it is often the field for a specific tab, identifying the data. In the picture on p. 7, the field with the label 'Course*'* is called '*courseName'* inside Ad Hoc. This is frequently true on tabs.
- **Student filters should almost always include the 'activeToday' field** – When running a filter/report searching for student information, if only currently enrolled students are needed, include the '*ActiveToday'* field from Demographics.

Special Notes for Learner Category Fields

Learner – While most fields are easy to find (Attendance fields are under the Attendance view, Grade fields are under the Grade view), there are some important sub-categories under Learner. These include:



- Active Enrollment (includes State Reporting fields, Special Ed fields, etc.)
- Graduation elements (includes Diploma Date fields, Cohort fields, etc.)
- All Enrollments (includes prior years' enrollments for State Reporting fields, Special Ed fields, etc.)
- Programs (includes student flags [i.e., document, custody order, contact], NY State program fact reporting)
- Waiver (includes fields on the Waiver tab used in California school districts)
- Schedule (includes the student's schedule information, courses, sections, teacher names)