# **Ad Hoc Filter Designer**

Last Modified on 07/29/2025 7:59 am CD

Query Wizard Features | Create a Filter | Manage Filters

#### Tool Search: Filter Designer

In the Query Wizard, elements are organized in a straightforward pattern, so it is easy to select the elements needed. Filters can be designed with student information, census/staff information or course/section information. Queries for students and course/section data pulls results from the calendar selected in the Campus toolbar. Census/Staff data pulls results from the entire Campus database, regardless of the calendar selected.

Filter Designer 🏠		F	Reporting > Ad Hoc Reporting > Filter Designer
Ad Hoc Filter Designer			
This wizard will walk you through the creation of a new filter. F	ilters can be created using the Query wizard, select	tion editor or a pass-through SQL Query. Ad	Hoc Filters can be used as a search, or as input to a report.
Saved Filter  Saved Filter  Saved Filter  Staff planner  Student 21cdc  Student 21cdc1  Student 21cdc2  Student 21cdc2  Student avard  Student email  Student email  Student Erik Test Frye Elementary 22-23  Student Lelsey SIS-167116  Student Lelsey SIS-167116  Student Lelsey SIS-167116  Student SIS-166745Lesley  Curriculum sme 21st CCLC  Student SIS-16745Lesley  Curriculum sudent_AIMStests  Student Test Filter  Student Est Filter  Student Est Copy Delete Export  Create a new Folder	Create New Filter Type  Create New  Guery Wizard Selection Editor Pass-through SQL Query Create	Data Type Student Census/Staff Course/Section	Current engine version: 2.0

Users need at least **Read** rights to the Filter Designer tool and at least **Add** rights for Query Wizard Filters in order to properly use this tool.

For more information about Tool Rights and how they function, see the <u>Tool Rights</u> article.

Unless using the <u>Data Warehouse</u>, queries should be created in such a way to avoid large results. Generating large queries may cause performance issues.

An ad hoc row limit is set on the database at 5 million rows. Any query that returns more than this is shortened. A warning message displays when this occurs.

When generating large queries and the Ad hoc Row Limit is met:

Select fewer fields to include in the query



- Add more filters (see Functions) to reduce the number of records
- Use direct SQL access

Filters including GPA fields may task the server. It is recommended that these queries be generated after normal school hours.

Filters built in the the Filter Designer display in HTML format. The HTML output allows for column sorting, filtering, grouping, and exporting to Excel or PDF.

Export to Excel Export to PDF				
rag a column header and drop it here to group by	y that column			
STUDENT.LASTNAME A	✓ STUDENT.FIRSTNAME	~	STUDENT.GENDER ~	STUDENT.BIRTHDATE
Anderson	<ul> <li>Sort Ascending</li> <li>Sort Descending</li> </ul>		м	05/21/2003
Anderson	Columns		F	03/22/2001
Anderson		Show items with value that:	F	11/14/2001
Anderson	Benjamin	is equal to 💦 👻	М	03/01/2002
Anderson	Brooke		F	04/25/2001
Anderson	Bryn	And ~	F	03/08/2003
Anderson	Daniel	Is equal to V	м	07/11/1999
Anderson	Ellie	Filter Clear	F	04/16/2000
Anderson	Erin		F	04/03/2001
Anderson	Evan		М	05/01/2000

HTML Filter Display

To view the output in a simple HTML table, click the link at the top of the output. This displays the output without the ability to sort, group and organize the columns.

Query Wizard functionality allows users to easily create Ad hoc filters by organizing elements in a straightforward manner. Query Wizard filters are dynamic and always pull current information from the database based on the fields and filter options selected.

When using Custom Tab fields within Ad Hoc Query Wizard, all students are included in the results even if the student does not have a record within the custom dated tab. To exclude students without records for fields from a custom tab that is a Table or List Element tab type, set the statusDate Operator to **IS NOT NULL**. When pulling in fields from a custom tab that is a Table or List Element tab type, Ad Hoc logic outputs every possible combination based on a specific date and time. The Table Tab Type stores specific times. The List Element Tab type always stores 12:00 AM. See the <u>Custom Tool Setup</u> article for more information.

# **Query Wizard Features**

<u>Short and Long Filter Descriptions | Filter Operators | Logical Expressions | Functions | Output</u> <u>Formatting | Grouping and Aggregation Descriptions</u>



### **Short and Long Filter Descriptions**

This provides additional information and context about the filter. It's displayed when a user selects that filter from the Saved Filters list and when the filter is being modified.

Ad Hoc Query Wizard - Field Selection
Select fields to use for creating a filter for which logic and output formatting may be applied. Click a field within the All Fields window, or use the Add Function option to add the field to the Selected Fields window. To remove a field from the Selected Fields window, select the fields) and click the back arrow < The output will sequence the fields in the order selected; however, the sequence can be changed on the Output Formatting screen. At least one field must be selected to continue.
Field Selection > Filter Parameters > Output Formatting > Grouping and Aggregation
*Query Name: Test Filter
Short Description: [This field is used to enter instructions or a short description of the filter. Maximum of 140 oharacters
Long Description: This field is used to enter more details about the filter. Maximum of 1000 oharacters.
Select categories & fields
Filter By Search Clear All Fields Selected Fields
B SI Student
H - KX Demographics     H - KX School Boundaries
tr swi School Boundarles ⊕ 192 School Calendar
B- SE School
e-s≋ District e-s≋ Learner
⊕- #≵ Counselor
trans versus termina termi
🗈 🕮 Medicaid 🦛
Sehavior     Sehavior     Sehavior
🕀 - KE Assessment
terrer se Grading terrer Portfolio
terret ottobio
€- %X Locker €- %X Fee
th sa Fee ⊕ sa Transportation
D - 52 Activities
Add Function Edit Function
Save To: (i) User Account Folder[/
O User Groups
Force Order
Save & Test Return To List
< Back Next >

Click here to expand...

To attach short and/or long descriptions to a filter, enter this information within the **Short Description** and **Long Description** text fields. To access the **Long Description** text box, select the (+) icon. Once the filter itself is saved, all descriptions entered are saved.

Once a filter has a long description entered and saved, this information displays on the Filter Designer editor when the filter is selected in the **Saved Filters** window. This is useful when determining what filter to use as well as communicating any important information about the filter prior to editing or making modifications. If a short description has been entered, this information displays when the cursor hovers over the filter within the **Saved Filters** window.



Both the Short and Long Descriptions display when a saved filter is edited/modified. Although the Long Description field appears locked, it can be modified by selecting the (+) icon.

Ad Hoc Filter Designer		
This wizard will walk you through the creation of a new fil used as a search, or as input to a report.	ter. Filters can be created using the Query v	vizard, selection editor or a pass-through SQL Query. Ad Hoc Filters can be
Saved Filters	Test Filter	
	This field is used to enter more det	ails about the filter. Maximum of 1000 characters
E E State Published	Last Updated 05/04/2011	
	Create New	
	Filter Type	Data Type
	O Query Wizard	◯ Student
	O Selection Editor	Census/Staff
	Pass-through SQL Query	Course/Section
	Create	
	]	
Search Edit Test Copy Delete Export		
Create a new Folder		
	Filter Description Di	icplay
	THE DESCRIPTION DI	spiay

## **Filter Operators**

Filter operators allow users to set specific parameters per field within a filter. These parameters uniquely filter each field while maintaining the filter as a whole.

*Query Name: Test Filter			
Short Description: This field is	s used to enter instruc	tions or a short description of the filter. Maximum of 140 characters	
Long Description: This field is	s used to enter more d	etails about the filter. Maximum of 1000	+
Filter the data		-	
ID *Field	Operator	/alue	
× 1 sch.schoolID v			
× <sup>2</sup> sch.districtID ×	·		
X <sup>3</sup> sch.number V	· ~		
Add	=		
Logical Expression (Option	<> 1    >		
	>= <		
If logical expression is left bla		//	
Allowed symbols: AND OR N Example Syntax: (1 AND (2 0		5 OR 6))	
	LIKE NOT LIKE		
	SOUNDS LIKE CONTAINS		
Save To: OUser Account	STARTS WITH		
Folder: /		<u></u>	
O User Groups			
Force Order	0		
Save Save & Test	Return To List		
			< Back Next >

Users may apply multiple operators to the same field by clicking the **Add Filter** button and selecting a field. If a **Logical Expression** exists, all fields assigned an Operator must be included within the expression.

#### • Click here to expand...

Infinite (\*1

The following table describes each available filter operators:

Operator	Results	Example
= (Equals)	Returns exact match of value.	student.grade=3
		Only students in grade 3 are returned.



Operator	Results	Example
< > (Does not equal)	Returns results not equal to the value.	<pre>student.gender &lt; &gt; M Students who have a Gender = F assigned on their Identities record or who do not have a value entered in the Grade field are returned. This operator allows NULL values.</pre>
> (Greater than)	Returns results that are greater than the entered numeric value.	student.age > 16 All students older than 16 years of age are returned.
<pre>&gt; = (Greater than or equal to)</pre>	Returns results that are greater than or equal to the entered numeric value.	student.age >= 16 All students 16 years of age and older are returned.
< (Less than)	Returns results that are less than the entered numeric value.	student.age < 16 All students under the age of 16 are returned.
< = (Less than or equal to)	Returns results that are less than or equal to the entered numeric value.	student.age <= 16 All students 16 years of age and younger are returned.
IN	Includes value.	student.grade IN 9,10 All students in 9th and 10 grade are returned.
		When using this format, do not put spaces after the comma.



Operator	Results	Example
NOT IN	Excludes value.	student.grade NOT IN 11,12
		All students not in 11th or 12th grade are returned.
		This operator allows NULL values.
		When using this format, do not put spaces after the comma.
BETWEEN	Filters data between two specified values. Works with numbers, dates and strings.	For <b>BETWEEN</b> : student.stateID BETWEEN 00001 THROUGH 100000.
	If a date field is selected, the	All students with a State ID between 00001 - 100000 are returned.
	following options are available:	100000 are returned.
	• DATE - Returns data based on	For <b>DATE</b> : student.birthDate BETWEEN
	the specified date range (where the starting date is sub-	DATE 10151995 THROUGH DATE 10152010.
	<ul> <li>option 1 and the ending date is sub-option 2).</li> <li><b>TODAY</b> - Filters data based on dates that occur from a specific date through today or vice</li> </ul>	All students with a birth date between 10/15/1995 - 10/15/2010 are returned.
		For <b>TODAY</b> : student.startDate BETWEEN TODAY THROUGH TODAY.
	• <b>TOMORROW</b> - Filters data	All students who began an enrollment in the
	based on dates that occur from a specific date through	school today (current date) are returned.
	tomorrow or vice versa.	For <b>YESTERDAY</b> : student.startDate
	• YESTERDAY - Filters data based on dates that occur from	BETWEEN YESTERDAY THROUGH DATE 10152010.
	<ul> <li>a specific date through yesterday or vice versa.</li> <li>DAYS BEFORE - Filters data based on the number of days</li> </ul>	All students who began an enrollment in the school yesterday through 10/15/2010 are returned.
	(sub-option 1) prior to sub-	
	option 2 through sub-option 2. • MONTHS BEFORE - Filters	For <b>DAYS BEFORE</b> : student.startDate BETWEEN DAYS BEFORE 4 THROUGH
	data based on the number of months (sub-option 1) prior to sub-option 2 through sub- option 2.	YESTERDAY.
		All students who began an enrollment in the school 4 days before yesterday through
	• <b>DAYS AFTER</b> - Filters data based on sub-option 1 through	yesterday are returned.
	the number of days (sub-option	For MONTHS BEFORE: student.startDate



Operator	Results • MONTHS AFTER - Filters data	BETWEEN MONTHS BEFORE 5 THROUGH TODAY.
	based on sub-option 1 through the number of months (sub- option 2) after the sub-option 1 date.	All students who began an enrollment in the school 5 months prior to today through today are returned.
		For <b>DAYS AFTER</b> : student.startDate BETWEEN DATE 10152010 THROUGH DAYS AFTER 5.
		All students who began an enrollment in the school on 10/15/2010 through 10/20/2010 (5 days after) are returned.
		For <b>MONTHS AFTER</b> : student.startDate BETWEEN DATE 10152010 THROUGH MONTHS AFTER 5.
		All students who began enrolling in the school on 10/15/2010 through 3/15/2011 (five months after) are returned.
IS CURRENT USER	Returns the current user's ID.	Learner Plan Manager Setting learningPlan.planManagerPersonID IS CURRENT USER reports the current user's ID, along with data only applicable to that user.
		<b>Current Teacher Sections</b> For courseSection.personID IS CURRENT USER limits the results to students in the current teacher's section. This is useful for a report of student birthdays with a homeroom, or a Spirit Squad Advisor who needs to make locker signs and needs a list of participants and locker information.
LIKE	Searches for test string in the field.	course LIKE hist All courses like History 101 are returned.
NOT LIKE	Searches for test string and filters data that is not like the user-defined value.	course NOT LIKE hist All courses not like Hist are returned.
	value.	This operator allows NULL values.



Operator	Results	Example
SOUNDS LIKE	Uses a database function to return names with similar sound patterns.	student.lastName SOUNDS LIKE Ball Names such as "Ball," "Bell" and "Boll" are returned.
CONTAINS	Searches for strings that include the same data entered by the user in the field. Any string that does not contain the user-defined value is filtered out. Any wildcard characters entered are treated as standard SQL wildcards.	student.birthCountry CONTAINS Cana All students with a Birth Country that contains "Cana" are returned.
STARTS WITH	Searches for strings that begin with the same data entered by the user in the field. Any string that does not contain the user-defined value is filtered out. Any wildcard characters entered are treated as standard SQL wildcards.	student.birthCountry STARTS WITH Mexi All students with a Birth Country that begins with "Mexi" are returned.
ENDS WITH	Searches for strings that end with the same data entered by the user in the field. Any string that does not contain the user-defined value is filtered out. Any wildcard characters entered are treated as standard SQL wildcards.	student.birthCountry ENDS WITH many All students with a Birth Country that ends with "many" are returned.
IS NULL	Returns fields that are completely NULL (0 is considered a value).	student.stateID IS NULL All students who do not have a state ID are returned.
IS NOT NULL	Returns all fields that are not NULL (0 is considered a value).	student.ssn IS NOT NULL All students who do not have a stateID are returned.
IS TODAY	Returns result dates as the current date.	start.date IS TODAY Entries where the start.date is the current date are returned.
IS YESTERDAY	Returns result dates as of yesterday's date.	start.date IS YESTERDAY Results for one day previous to the current date are returned.



Operator	Results	Example
IS TOMORROW	Returns result dates as of tomorrow's date.	end.date IS TOMORROW Results for one day after the current date are returned.
IN THE MONTH	Returns all database field data for the month entered. This operator allows both numbered dates and spelled-out dates (e.g., 10 or October). It also allows for both upper and lower case letters. If spelling out a month, users must	employment.districtStartDate IN THE MONTH October All employees who have a district employment Start Date within the month of October are returned. This operator does not look at the Year or Calendar selected in the Campus toolbar. All historical and current
	enter at least the first three characters (e.g., Oct for October).	district employment records with a Start Date in October are returned.
=TRUE	Returns checkbox values of "true" (checkbox is marked)	enrollment.stateExclude = TRUE All students with the State Exclude checkbox marked on their enrollment records are returned.
=FALSE	Returns checkbox values of "false" (checkbox is not marked)	enrollment.stateExclude = FALSE All students who do not have the State Exclude checkbox marked on their enrollment records are returned.

In addition to the options above, wildcard searching is also available. The following is a list of options:

Wildcard or Pattern	SQL Meaning	Standard Examples
%	0 or more characters	Entering the word <i>Man</i> returns the same results when entering <i>Man%</i> . <i>%son</i> finds names that end in <i>-son</i> : Johnson, Manson, Jason-Benson, etc.
_ (underscore)	One character	<ul> <li>Olson_Zierke and Olson Sierke return the same results.</li> <li>L (with two underscores) does not look only for 3-character names that start with L, but _L_e finds names where L is the first and e the third character (e.g. Lee, Luewenhook).</li> <li>If the three underscores are entered at the end of a name, like Dan, results list names with three additional letters (Daniel).</li> </ul>



Wildcard or Pattern	SQL Meaning	Standard Examples
[token]	A range of possible characters	<i>L[ae]</i> finds names that start with <i>La</i> or <i>Le</i> .
,James	No SQL wildcard	Searches for first name equal to or beginning with James. This can only be used in the Quick Search fields.
Gonzales-Uribe	Compound name	Finds that last name. This returns compound names regardless of whether they are linked by a space or hyphen.
Gonzales Uribe or Gonzales_uribe or Gonzales%uribe	A compound name with a space.	Finds the name with or without a space or hyphen. Try wildcards if there is a space between the compound names.

Users can also use the following combinations when using the *Like* operator:

Wildcard or Pattern	SQL Meaning	Standard Examples
%	0 or more characters	L% finds names that start with L L finds names that contain an L LAN finds names containing LAN (Blanko, Landesburg, Blankenship, etc.)
_ (underscore)	One character	<i>L</i> (two underscores) finds <i>Lee</i> and <i>Lor</i> , not <i>Luewenhook</i> .
[token]	A range of possible characters	<i>L[ae]%</i> finds names that start with <i>La</i> or <i>Le</i> .
^	Negation of token	<i>L[Query Wizard^ae]</i> finds names that do not start with <i>La</i> or <i>Le</i> .

#### **Rules for Operators by Data Type**

The following table describes all rules for allowing or disallowing operators by data type, where Y = Allowed, N = Not Allowed, and D = Depends on Field.

Option	Number	Float	String	Date	Text	Bit
>	Y	Y	Y	Y	Y	Ν

Option	Number	Float	String	Date	Text	Bit
>=	Y	Y	Y	Y	Y	Ν
<	Y	Y	Y	Y	Y	Ν
<=	Y	Y	Y	Y	Y	Ν
< >	Y	Y	Y	Y	Y	Ν
=	Y	Y	Y	Y	Y	Ν
IS NULL	D	D	D	D	D	Ν
IS NOT NULL	D	D	D	D	D	Ν
BETWEEN	Y	Y	Y	Y	Y	Ν
IS TODAY	Ν	Ν	Ν	Y	Ν	Ν
IS YESTERDAY	Ν	Ν	Ν	Y	Ν	Ν
IS TOMORROW	Ν	Ν	Ν	Y	Ν	Ν
IN	Y	Y	Y	Y	Y	Ν
NOT IN	Y	Y	Y	Y	Y	Ν
LIKE	Ν	Ν	Y	Ν	Ν	Ν
STARTS WITH	Ν	Ν	Y	Ν	Ν	Ν
ENDS WITH	Ν	N	Y	N	Ν	Ν
CONTAINS	Ν	Ν	Y	Ν	Ν	Ν
SOUNDS LIKE	Ν	N	Y	Ν	Ν	Ν
=TRUE	Ν	N	Ν	Ν	Ν	Y
=FALSE	Ν	Ν	Ν	Ν	Ν	Y

#### Use a Field as an Operator Value

Depending on the operator chosen for the field, a field may be used as an operator's value allowing a comparison between two fields. Logic only allows fields of the same data type to be used as the Operator's Value. For example, date fields are allowed to use other date fields as an operator value. When the appropriate operator is used, the Value column can act as a dropdown list while remaining static allowing the user to select a field or input a value. Deleting a field also removes it from the Value field, clearing out the operator for the field using it. Additionally, replacing a field with the <u>Element Replacement tool</u> replaces the field and the operator's value if the replaced field is being used as the value.

Ad Hoc Query Wizard - Filter Para	ameters			
*Query Name: Fees charged o	luring a student's enro	oliment		
Short Description:				
Long Description:				+
Filter the data				
ID *Field	Operator	Value		
X 1 student.personID	•	•		
X 2 student.lastName	•	•		
X <sup>3</sup> student.firstName	•	•		
X 4 feeDetail.feeID	•	•		
∑ <sup>5</sup> feeDetail.feeType	•	•		
★ 6 feeDetail.feeAmount	•	•		
X 7 activeEnrollment.startDa	te 🗸	•		
× 8 activeEnrollment.endDat	e 🗸	•		
♀ 9 feeDetail.dueDate	▼ >=	<ul> <li>activeEnrollment.startDate</li> </ul>	~	
🗙 10 feeDetail.dueDate	• <=	➡ activeEnrollment.endDate	~	
Add		activeEnrollment.startDate		
Logical Expression (Optional):		activeEnrollment.endDate		
If logical expression is left blank, Allowed symbols: AND OR NOT (		pplied.		
Example Syntax: (1 AND (2 OR 3)		R 6))		
Save To: Ouser Account Folder: /	~			
rown.	-			
O User Groups				
E Force Order 🕑				
Save Save & Test	Return To List			
				< Back Next >

In the above example, a query was set to report students with fees charged during enrollment. Using the fields activeEnrollment.startDate (7) and activeEnrollment.endDate (8) as operator values for feeDetail.dueDate (9, 10), the query reports students with fees due on or after the student's active enrollment start date AND on or before the student's active enrollment end date.

#### **Operators Allowed to Use a Field as Values**

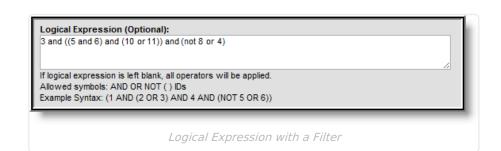


Operator	Allowed
>	Y
>=	Y
<	Y
<=	Y
< >	Y
=	Y
BETWEEN	Y
IS CURRENT USER	Ν
IN THE MONTH OF	Ν
MONTHS BEFORE	Ν
DAYS BEFORE	N
IS NOT NULL	Ν
IS NULL	Ν
IS TODAY	Ν
IS YESTERDAY	Ν
IS TOMORROW	Ν
IN	Ν
NOT IN	Ν
LIKE	Ν
STARTS WITH	Ν
ENDS WITH	Ν
CONTAINS	Ν
SOUNDS LIKE	Ν
=TRUE	Ν
=FALSE	Ν

### **Logical Expressions**

The Logical Expression field allows users to incorporate conditions between fields within a filter. This field effectively uses the OR, AND, and NOT conditions between fields and groups of fields.

- Only fields assigned an **Operator** are allowed to be included within logical expressions.
- Logical Expressions are created using the ID number associated with each field.



Logical expressions can be grouped using () symbols and the ID number to define the order in which the tool should include or exclude a person. In the example above, the () symbols indicate the tool should determine the student's End Date (5) and grade (6) and include these students depending on whether they are Asian (10) or White (11). This determination and group of students is then applied to the remaining parts of the logical expression.

Using () symbols is especially useful when using the OR condition, as users can include or exclude people based on whether or not they meet the criteria for the fields included within a group of fields. For example, students with a State ID less than 1000 (8) or an End Status populated (4) are not included in the remaining calculation for the logical expression.

### **Functions**

Functions can be added to filters, which allow logic to be applied to field columns when the filter is generated via the Data Export tool. To add a function to a filter, select the **Add Function** button. The **Function Editor** appears in a new window.

Filter Designer ☆ Reporting > Ad Hoc Reporting > Filter Designer	
Filter By Search Clear All Fields Selected Fields	
Function Editor	×
The Function Editor allows the application of logic to columns that are output when the Ad Hoc Data Export tool is utilized. A constant function allows outputting a new column that is not based on any field selection - this will output the Constant Value entered for every record returned. The Concatenate function allows appending selected fields. The Coalesce function allows for returning alternate results if the first field would return a null. Both Concatenate and Coalesce will apply logic in the order the parameters are selected.	
*Name: *Function: Constant	
Constant value:     Add       Filter By     Search       Clear	
All Fields:	

Click here to expand...

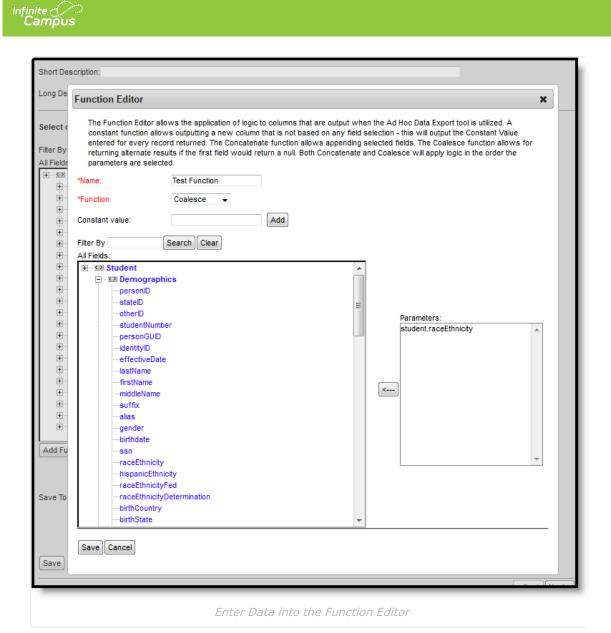


#### **Add Functions to Queries**

- 1. Enter the **Name** of the function. This name differentiates the function from other functions within the **Selected Fields** window and on filters generated via the <u>Data Export</u> tool.
- Select the desired **Function** from the dropdown list. The Function Descriptions section below provides descriptions and examples of each function. Once a function is selected, the **Filter** By Search field (see step 4) becomes active.
- If the Constant Function is selected, enter the Constant Value and click the Add button. The value entered displays in the Parameters window and is reported on every record returned.
- 4. Use the **Filter By Search** field to search for desired fields. Entering a search value and clicking the **Search** button resets the list of fields to only return matching fields. Click the **Clear** button to remove entered search values and see the entire list of fields.
- 5. Select which fields to include within the function by clicking on each field within the **All Fields** window. Selected fields move into the **Parameters** window, indicating which fields have been added to the function.
- 6. Select the **Save** icon.

Ad Hoc Query Wizard - Field Selection			
*Query Name: Test Filter			
Short Description:			
Long Description:			+
Select categories & fields			
Filter By Search Clear			
All Fields		Selected Fields	
. E Student	<u> </u>	student.lastName	*
		student.firstName student.middleName	
En School Calendar		student.endDate	
⊕ School     ⊕ District		ola control de la control de l	
	-		
E ↔ Census	E		
⊞ 🖾 Assessment			
🛨 ··· 🖾 Grading			
Elearner Portfolio			
E → S Locker			
E → S Fee			
FI ≤≥ Food Service			
The Structure Bus Info			
Custom Tab: Certifications	Ŧ		*
Add Function		Edit Function	
			< Back Next >
			- Dacid Mext >

Adding a Function to a Filter



The **Field Selection** editor appears after saving the added function. Functions created and added to the filter are displayed in the Selected Fields window. The function's name always appears to the left of the period (*i.e.*, function.functionName).

uery Name: Test Filter		
hort Description:		
ong Description:	ŧ	
elect categories & fields		
ter By Search Clear		
I Fields	Selected Fields	
	function.Test function	~
🖃 🖙 🗈 Demographics	student.firstName	
personID	student.middleName student.lastName	
stateID	≡ student.lastvarie	
otherID	Student.gender	
studentNumber		
personGUID		
identityID effectiveDate		
lastName		
firstName		
middleName		
suffix	<	
malias		
gender		
birthdate		
<b>SS</b> N		
raceEthnicity		
hispanicEthnicity		
raceEthnicityFed		
raceEthnicityDetermination		
birthCountry		
enrollmentID grade	-	-
dd Function	Edit Function	
dd Farrellong	Later and ton	
		< Back Nex

#### **Edit Functions**

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Existing functions can be edited by selecting the function within the **Selected Fields** window and clicking the **Edit Function** button.

d Hoc Query Wizard - Field Selection	
Query Name: Test Filter 1	
hort Description:	
ong Description:	+
elect categories & fields	
ilter By Search Clear	
II Fields	Selected Fields
±	function.Test function
	student.firstName
	student.middleName
	student.lastName
E Counselor	
	E
	=
T State Custom Tab: Bus Info	
E Custom Tab: Certifications	- · · · · · · · · · · · · · · · · · · ·
Add Function	Edit Function
	< Back

### **Function Descriptions**

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The following describes each available function.

Function	Description	Example
Constant	The Constant function outputs the Constant Value entered on each record returned when the filter is exported. A Constant Value of 5 is entered and added to the filter in the examples to the right. When the filter is exported, a column is reported displaying the <b>Constant Value</b> entered.	Function Editor the two the supportion of high is during that are adead when the 3d Nex Data Eaper that an address are address and a support and address are address and address and address are address and address and address and address and address are address and address and address and address are address and addre



Function	Description	Example
Coalesce	The Coalesce function allows users to define multiple fields where logic pulls the first field, and if NULL, the second field is pulled, and so on down the line of added fields until a value is found. Logic pulls field values in the order fields are selected in the <b>Function Editor</b> .	Function Editor     X       The function Editor into the specification of tage is businers in all excited where the Add the Class Equiparts the addited. A functional additional additadditional additional additadditional additadditinadditi
	A Coalesce function for Federal Race Ethnicity and Race Ethnicity Determination fields was added to the examples to the right. This means logic first pulls and reports student Federal Race Ethnicity field values and for any that are NULL, the student's Race Ethnicity Determination reports. When the filter is exported, the function reports field data within a specific column. Student Federal Race Ethnicity values are reported.	Test Function - Coalesce Total Records: 1039           Simple HTML table <ul></ul>
Concatenate	The Concatenate function allows field values to be appended when the filter is exported. In the example to the right, a Concatenate function for fields Gender and Race Ethnicity was added. When the filter is exported, field values are appended and reported. Student Gender values (M, F) are reported alongside student Race Ethnicity values.	Function Editor       X         The function Editor       The sequence of the local standard and plant and add made the sequence of the local back that the sequence of the sequence of the local back that the sequence of the sequence of the local back that the sequence of the sequence of the local back that that that the local back that the local back that t



Function	Description	Example
Add	The Add function allows field values to be added together to output a single result (i.e., field 1 + field 2). In the example to the right, Fee Debit is added to Fee Credit to generate a total balance. When the filter is exported, field values are added and reported as a single value.	Function Entities         V           The Standbase first the subjection of legs to schemating the production that the schematic that the schemat
		Single FIIK tabb ≩Tearstrait @frees to Have apole for daria Department and have apole for daria Subert of have apole for daria Subert Bian Meny 07182017 20 Subert David Men 07182017 20 Subert David James 07182017 20 Subert David James 07182017 20 Subert Field Louis 0702017 50 Subert Field Louis 0702017 50 Subert Field Louis 0702017 50 Subert Louis 0702017 50 Subert Field Louis 0702017 50
Subtract	The Subtract function allows field values to be subtracted from each other to output a single result. In the example to the right, total Fees are subtracted from Total Paid to report a student's outstanding balance. When the filter is exported, field values are subtracted and reported as a single value.	Function Entropy         P           The Description of registic scheme that purple the the Art for Onto Tigot that at entropy of the the description of the descrip
Multiply	The Multiply function allows field values to be multiplied together to output a single result (i.e., field 1 x field 2). In the right-hand example, employee hours per day are multiplied by the number of days employed for the year. When the filter is exported, field values are multiplied and reported as a single value.	



Function	Description	Example
Divide	<ul> <li>The Divide function allows a field or more fields to be divided and output into a single result (i.e., field 1 / field 2).</li> <li>In the example to the right, the total number of fees is divided by the total amount of fees paid to get the percentage of total fees paid to date. If applicable, decimal places are included in the output.</li> <li>When the filter is exported, field values are divided and reported as a single value.</li> </ul>	First filter         Total filter           Total filter         Total filter
Record Count	<ul> <li>The Record Count function allows users to report a record count for the field selected.</li> <li>In the example to the right, a record count of behavior events is used to report a count of behavior events per grade level.</li> <li>When the filter is exported, a record count of the field is calculated and reported.</li> </ul>	Face for         Sector box           J Trees
Distinct Count	<ul> <li>The Distinct function allows users to report a distinct count for the field selected.</li> <li>In the example to the right, a distinct count of behavior events is used to report the distinct count of behavior events per grade level.</li> <li>When the filter is exported, a record count of the field is calculated and reported</li> </ul>	



Function	Description	Example
MIN	The MIN function allows users to report the minimum value for a field. In the example to the right, the MIN BMI function reports the minimum BMI (Body Mass Index) per grade level. When the filter is exported, the MIN of the field is calculated and reported.	Image: Section
ΜΑΧ	<ul><li>The MAX function allows users to report the maximum value for a field.</li><li>In the example to the right, the MAX student count is used as the function to report the largest class size per course.</li><li>When the filter is exported, the MAX of the field is calculated and reported.</li></ul>	Function film         Image: Control in the problem into the problem intothe problem into the problem intothe problem into the
SUM	The SUM function adds the value or field selected over all other aggregated fields. In the example to the right, the SUM of fee amounts is used to report the SUM of fees per grade. When the filter is exported, the SUM field is calculated and reported.	Function filter The observation of segurity that the the set has the set of the year that the A chain to the problem of the set of th



Function	Description	Example
AVG	The AVG function allows users to report the average value for a field.	Function Editor         X           The Function Editor allows the application of logic to columns that are endput when the Ad Not Data Doport boll is Address A more applications. This will apply the Column Value or intermediate that the second of the Ad Not Data Doport boll is Address A more applications. This will apply the column Value or intermediate that the second of the Address
	In the example to the right, the AVG of roster student count is used to report the average class size per department.	Crontert vale
	When the filter is exported, the AVG field is calculated and reported.	Business     17       Construits     particular busility       Discussions     17       Consummary sequences     14       Exclussions     25       Fashly Consumer Science     21       Cideal Language     22       Health     32       Manh     25       Juac     36

### **Output Formatting**

The Output Formatting editor lets users control how each field is reported and displayed when exported.

*Query Name: <u>new filter</u> Short Description:			]			
Long Description:					+	
Format the output file/report						
Output distinct records						
Field	OutputSeq	Sort Direction	Column Header		ormatting	Length
student.raceEthnicityDeterminatio		1 Ascend	×	 		×
student.birthCountry	_					
student.birthState	3		/	_L		
Save To: OUser Account Folder:						
O User Groups						
🗌 Force Order 🛿						
Save Save & Test	Return	To List				
					< Ba	ck Next >

• Click here to expand...

#### **Output Formatting Descriptions**



Field	Description
Output distinct records	<ul> <li>If marked, data is outputted in unduplicated records based on field values.</li> <li>The following is an example of a filter containing student first name, last name, grade, gender, and behavior event type:</li> <li>If a student has three behavior events for the same behavior event type and the Output distinct records checkbox is not marked, the student reports three records.</li> <li>If the Output distinct records checkbox is marked, the same student now only reports one record.</li> </ul>
Field	Fields selected from the All Fields window in the previous screen.
Output	This checkbox determines whether or not the field is included in outputted data. Deselecting this checkbox means data is still filtered and reported for this field and operators but not included in the output.
Seq	This field determines the sequence of outputted data.
Sort	This field determines the sort order of outputted field data.
Direction	This field determines if data is sorted ascending or descending. This field is only available if a value is entered in the Sort field.
Column Header	This field determines what header is displays for the field on exported files. Users are encouraged to enter a logical and easily identifiable column header for each field, as leaving the field blank results in the field name (i.e., student.stateID) being reported.
Alignment	The field determines how field data is aligned on files exported. Available options include: Left, Center and Right.



Field	Description
Formatting	The field determines how values are reported for the field when used in reports and exported files. Formatting options are important for filters used with reports which require specific formatting in order for the file to be correctly submitted to an entity or system.
	<ul> <li>The following formatting options are available:</li> <li>Zero Pad - numbers are padded with zeros to the left (<i>i.e.</i>, 444 zero padded becomes 000444)</li> </ul>
	<ul> <li>Space Fill - values are filled with spaces in order to reach required field length</li> </ul>
	<ul> <li>Upper Case - values are reported entirely in uppercase (i.e., Course is reported COURSE). This option is only available for text, char and varchar fields.</li> </ul>
	• <b>Lower Case</b> - values are reported entirely in lowercase (i.e., Course is reported course). This option is only available for text, char and varchar fields.
	<ul><li>MM/DD/YYYY</li><li>MM-DD-YYYY</li></ul>
	<ul> <li>MMDDYYYY</li> <li>YYYY/MM/DD</li> </ul>
	YYYY-MM-DD     YYYYMMDD
	• YYYY • YYYY/MM • YYYY-MM
	<ul> <li>YYYYMM</li> <li>MM/YYYY</li> </ul>
	• MM-YYYY • MMYYYY
	<ul> <li>MM/DD/YYYY hh:mm AM</li> <li>MM-DD-YYYY hh:mm AM</li> </ul>
	• <b>YYYYMMDDHHmm</b> - This is similar to military time (e.g.,1:00PM is 1300) because there is no AM/PM.
	<ul> <li>1, 234.5; - 1,234.5</li> <li>1,234.5; (1,234.5)</li> <li>\$1,234.00; -\$1,234.00</li> </ul>
	<ul> <li>\$1,234.00; (\$1,234.00)</li> <li>\$1,234.00; (\$1,234.00)</li> <li>Y/N - Used with bit fields. If bit field is checked, Y is reported. If field is</li> </ul>
	unchecked, N is reported. • <b>YES/NO</b> - Used with bit fields. If bit field is checked, YES is reported. If
	<ul> <li>field is unchecked, NO is reported.</li> <li><b>T/F</b> - Used with bit fields. If bit field is checked, T is reported. If field is</li> </ul>
	<ul> <li>unchecked, F is reported.</li> <li><b>TRUE/FALSE</b> - Used with bit fields. If bit field is checked, TRUE is reported. If field is unchecked, FALSE is reported.</li> </ul>
	<ul> <li><b>1/0</b> - Used with bit fields. If bit field is checked, 1 is reported. If field is unchecked, 0 is reported.</li> </ul>



Field	Description
Length	This field determines the length of the column in the exported data file. This is the maximum amount of characters allowed to be reported in the column. Data which exceeds the defined length is truncated on the right side. Zero padding is added to the left of a value. Space filling is added to the right of a value. A length must be defined for each field when exporting the filter in Fixed Width format within the Data Export tool.
Save To	Indicates whether the filter saves to the current user, a user group(s) or specific folder. If a filter is saved to more than one user group, a separate copy is stored for each group. Each group can independently edit the filter without affecting another group's copy. If a filter with the same name already exists within a group, the filter name is appended with a number in parentheses indicating an incremented version number ( <i>i.e.</i> , HonorStudents already exists for a group so saving a new filter with the same name appends the name to HonorStudents(2)). If the filter was saved across multiple groups, the filter name only displas as appended for groups where a filter with the same name already exists.
Test	This field allows users to test and preview a filter before saving it. Test results display in a separate window. To view the test filter, pop-up windows must be enabled on the web browser.
Save	Saves the filter.

## **Grouping and Aggregation Descriptions**

Grouping and aggregation places results into groups and calculations can be performed on the results. Aggregations display at the bottom of each data group when extracting the data. These options are not available for fixed-width output formats.

nfinite Campus	
*Query Nam	e: Test Filter
Short Descri	ption: This field is used to enter instructions or a short description of the filter. Maximum of 140 characters
Long Descri	ption: This field is used to enter more details about the filter. Maximum of 1000
Group the c	lata into sections that can have aggregates/sub-totals
Commission	Carrier hu Carrier Orden
Grouping Tier 1	Group by Group Order sch.schoolID V Ascending V
Tier 2	✓ Ascending ✓
Tier 3	Ascending V
Tier 4	Ascending V
Tier 5	✓ Ascending ✓
Aggrogatel	Sub Total byAggregate Type
Aggregater	
Save To:	● User Account Folder: // ▼
	O User Groups
	Force Order
Save	Save & Test Return To List

#### • Click here to expand...

The following describes the available options.

Field	Description
Grouping	This is the order in which each group is reported. Users are allowed to report up to 5 tiers (or groups).
Group By	Determines which field is in the group and reports aggregate/sub-totals. Only fields included within the filter are available for selection.
Group Order	Determines how group aggregate/sub-totals are reported when exported via the Data Export tool.
Aggregate/Sub Total by	Determines which field within the filter is used for the 'Group by' fields. For example, a user creating a behavior Ad hoc filter who chooses to Group By behavior events and Aggregate By personID using an Aggregate Type of Distinct Count produces the number of students per Behavior Event Type.



Field	Description
Field Aggregate Type	<ul> <li>Description</li> <li>Determines which calculation is applied to the group when calculating and reporting aggregate/sub-totals. For example, a group containing student last names (student.lastName) with an Aggregate/Sub Total of State ID (student.stateID) and an Aggregate Type of Distinct Count reports individual groups based on student last names with a count of how many students within that group have distinct State IDs.</li> <li>Aggregate Types include: <ul> <li>Record Count - Indicates the total number of records in the group.</li> <li>Distinct Count - Indicates the total number of distinct records within a group based on the fields selected to be counted from the Aggregate By option.</li> <li>MIN—Indicates the minimum value for the designated Aggregate/Sub Total field within a group (e.g., an Aggregate/Sub Total for State ID (student.stateID) with a MIN Aggregate Type reports the smallest State ID value with each group).</li> <li>MAX—Indicates the maximum value for the designated Aggregate/Sub Total field within a group (e.g., an Aggregate/Sub Total for State ID (student.stateID) with a MX Aggregate</li> <li>Type reports the largest State ID value within a group for the Aggregate/Sub Total field within a group for the Aggregate/Sub Total field selected (<i>i.e.</i>, an Aggregate/Sub Total for Present Minutes (attendanceDetail.presentMinutes) with a SUM Aggregate Type reports a sum of all Present Minutes within a group for the Aggregate/Sub Total field selected (<i>i.e.</i>, an Aggregate/Sub Total for Present Minutes (attendanceDetail.presentMinutes) with AVG Aggregate</li> </ul> </li> </ul>
	Type reports the average of Present Minutes for all students within each group)
	See the <u>Rules for Aggregate Calculations by Data Type</u> table below for more information.
Save To	Indicates whether the filter saves to the current user, a user group(s) or specific folder. If a filter is saved to more than one User Group, a separate copy is stored for each group. Each group can independently edit the filter without affecting another group's copy. If a filter with the same name already exists within a group, the filter name is appended with a number in parentheses indicating an incremented version number ( <i>i.e.,</i> HonorStudents already exists for a group so saving a new filter with the same name appends the name to HonorStudents(2)). If the filter was saved across multiple groups, the filter name

Field	Description
Test	This field allows users to test and preview a filter before saving it. Test results display in a separate window. To view the test filter, pop-up windows must be enabled on the web browser.
Save	Saves the filter within Infinite Campus. The filter is now available for use in all Ad hoc Filter fields throughout Infinite Campus (if the user is part of the user group the filter was saved to).

#### **Rules for Aggregate Calculations by Data Type**

The following table describes all rules for allowing or disallowing aggregate calculations based on data type:

Data Type	Number	Float	String	Date	Text	Bit
MIN	Yes	Yes	Yes	Yes	Yes	Yes
MAX	Yes	Yes	Yes	Yes	Yes	Yes
AVG	Yes	Yes	No	No	No	No
SUM	Yes	Yes	No	No	No	No
<b>Record Count</b>	Yes	Yes	Yes	Yes	Yes	Yes
<b>Distinct Count</b>	Yes	Yes	Yes	Yes	Yes	Yes

# **Create a Filter**

The following is a basic workflow for creating a filter. See the <u>Query Wizard Features</u> for additional formatting and modification that can be done for more advanced filters.

### Step 1. Choose Filter and Data Type

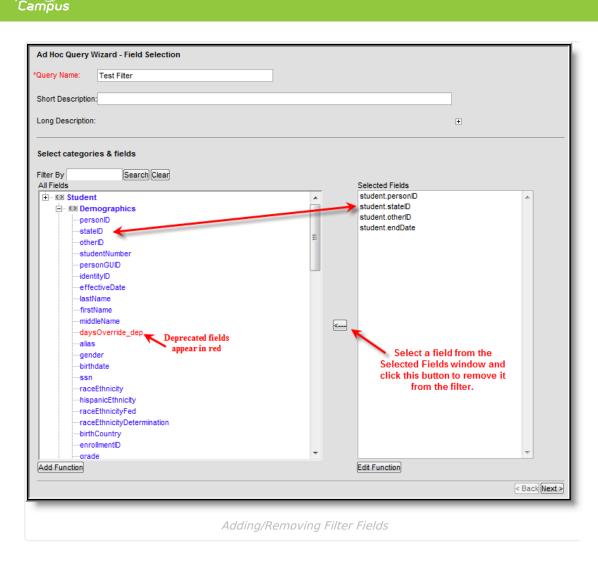
- 1. Select the Query Wizard radio button.
- 2. Select a **Data Type**. This determines which fields are available for selection: **Student**, **Census/Staff**, or **Course/Section**.
- 3. Click the **Next** button. The screen displays a list of fields to select in order to create the filter.

aved Filter		
student * A test for nate OR student * A test for nate	Create New	
<ul> <li>student * MPN Bit Field Translation</li> <li>student * MPN The OR Factor</li> <li>student * MPN Validations for OR</li> <li>student * MN Validations for OR</li> <li>student * Mousy Group Filter</li> <li>student ANareud</li> <li>student CMD Test</li> <li>curriculum Course test</li> <li>student custom tabs</li> <li>student specialServiceHours</li> <li>student wefwef</li> <li>CaICY - 004 (FOE)</li> <li>CaICY - 012 (RSI)</li> <li>CaICY - 020 (PLE)</li> <li>CaICY - 030 (ZLE)</li> <li>Tools - Assessment</li> <li>Tools - Attendance dialer</li> <li>Search Edit Copy Delete Export</li> </ul>	Filter Type	Data Type Student Census/Staff Course/Section

## **Step 2. Select Categories and Fields**

Campus fields are organized into specific categories relating to the Filter Data Type selected on the previous screen. Categories are organized in a hierarchy format, where selecting the (+) open available fields and additional subcategories within the category. Users may include Campus and user-created custom fields when building filters.

- 1. Enter a **Query Name** for the filter.
- 2. Enter a **Short** and or **Long Description** about the filter (if applicable).
- 3. Select the data elements from the **All Fields** list by clicking on them. The fields move to the Selected Fields list. To remove a field from the Selected Fields list, click on it to highlight it and click the left-pointing arrow button.
- 4. Select the Add Function button to add a function to the filter.
- 5. To search for a particular field, enter part of its name in the Filter By section and click the Search button. Select the appropriate options for the query. All fields that contain that name display in the All Fields list. To clear the selection, click the Clear button, and all available fields display again.
- 6. To save the filter right now without testing it or modifying any results of the selected fields, choose **Save** or **Save and Test**.
- 7. To continue, click the **Next** button to continue creating the filter, narrow returned results and sort the filter into the desired order.



## **Step 3. Enter Filter Parameters**

Filter parameters allow users to define specific constraints for how each field is filtered within the filter. This tool allows users to filter very specific data within reports and other exported files.

- 1. Enter the Query Name and a Short/Long Description (if applicable).
- 2. Select the **Operator** for each Field. The available fields are based on the data elements selected in the previous Field Selection screen.
- 3. Enter the **Value** for each Operator. This is the value being used in conjunction with the Operator selected (*i.e.*, student.age > 5, where 5 is the value entered and the output is all students older than 5 years of age).
- 4. If a BETWEEN Operator was selected, fill in all appropriate fields.
- 5. Click the Add Filter button to apply multiple operators to the same field(s). Selecting this button adds an additional field area where users can select an already existing filter field and apply additional operators.
- 6. Enter a Logical Expression, if necessary.
- 7. For complicated filters that report data from several calendars and/or have many fields from many different areas, mark the **Force Order** checkbox. When marked, the database fields in the query are executed in a particular order to increase the filter's performance. When a filter takes several minutes to generate, try generating it again with this checkbox marked. Marking this on every filter is not recommended.



- 8. To save the filter right now without testing it or modifying any results of the selected fields, choose **Save** or **Save and Test**.
- 9. Select the **Next** button if output formatting and/or group data needs to be defined for the filter.

*Ouery Name: Test Filter							
Short Desc	Short Description: This field is used to enter instructions or a short description of the filter. Maximum of 140 characters						
Long Desci	Long Description: This field is used to enter more details about the filter. Maximum of 1000						
Filter the d	lata						
1	D *Field	Operator	Value				
× 1	sch.schoolID 🗸	~					
$\mathbf{X}^{-2}$	2 sch.districtID V	>= 🗸	sch.schoollD				
X 3	sch.number 🗸	~					
Add							
If logical ex Allowed sy	Logical Expression (Optional):  If logical expression is left blank, all operators will be applied. Allowed symbols: AND OR NOT () IDs Example Syntax: (1 AND (2 OR 3) AND 4 AND (NOT 5 OR 6))						
Save To:	User Account Folder	~					
	O User Groups						
	Force Order 🕜						
Save & Test Return To List							
< Back Next >							

### **Step 4. Enter Output Formatting Values**

- 1. Enter the Query Name and a Short/Long Description (if applicable).
- 2. If data should output in unduplicated records based on field values, mark the **Output distinct records** checkbox.
- If the field should appear in the filter output, verify the **Output** checkbox is marked. If it is not marked, the field does not display in the output but is used to filter data. For example, the field student.activeToday might be chosen to filter out inactive students (student.activeToday = 1), but the Output checkbox could be unselected so that field is not included in the output.
- 4. Enter the **Seq**uence. This number places the field in that order on the output.
- 5. Enter a number in the **Sort** field. This determines the order in which fields are sorted.
- 6. If a number was entered in the Sort field, determine how the field should be sorted by selecting a **Direction**. Data can be sorted by ascending or descending direction. If the Sequence and Sort fields are left blank, the fields display in the order selected and sort how the elements appear on the screen.
- 7. Enter a **Column Header** for each field. This is the header that display in the column relating to the field. If no header is entered, the field name is used as the header for the column (*i.e.*, student.otherID displays a column name of student.otherID if no header is entered).
- 8. Determine the field's **Alignment** on files exported via the Data Export tool.
- 9. Select the **Formatting** of outputted field data. These options allow users to specify how data is reported in exported files.
- 10. Enter the field **Length**. This field determines the maximum amount of characters the field



reports data before truncation. If data is exported using the Fixed Width format, each field with the Output checkbox checked must have a length value entered.

- 11. To save the filter right now without testing it or modifying any results of the selected fields, choose **Save** or **Save and Test**.
- 12. To continue, click the **Next** button to continue creating the filter, narrow returned results and sort the filter into the desired order.

*Query Name:	Test Filter								
Short Description:	Short Description: This field is used to enter instructions or a short description of the filter. Maximum of 140 characters								
Long Description:	This field i	s used to	enter more d	etails about the filter. Ma	iximum of 1000		+		
Format the output	ıt file/repo	rt							
Output distinct	records								
Field Outp	utSeq	Sort	Direction	Column Header	Alignment	Formatting		Length	
sch.schoolID				~	×		~		
sch.districtID		i		~	· ·	ĺ	~		
sch.number 🔽		1	-	~	~		~		
Save To:  User Account Folder									
Ou	O User Groups								
Force Order									
Save & Test Return To List									
								< Back Next >	

#### Step 5. Define Data Filter Grouping, Calculations and Subtotals

The Grouping and Aggregation editor allows users to group fields into sections and report specific aggregates/sub-totals for each section.

- 1. Enter the Query Name and a Short/Long Description (if applicable).
- 2. Select each field to **Group By** for each tier. This field determines which fields are grouped into sections, allowing the field to have separate aggregate/sub-totals reported.
- 3. Select each tier **Group Order**. This determines how aggregate/sub-total data is reported for the tier.
- 4. Select the field and determine the **Aggregate/Sub Total by Aggregate Type**. Data within each group aggregates based on the field and Aggregate Type selected. See the table below for information about each available aggregate type

.ampus						
*Query Name: Test Filter						
Short Description: This field is used to enter instructions or a short description of the filter. Maximum of 140 characters						
Short Description. This field is used to enter instructions of a short description of the liner. Maximum of 140 characters						
Long Description: This field is used to enter more details about the filter. Maximum of 1000	+					
Group the data into sections that can have aggregates/sub-totals						
Grouping Group by Group Order						
Tier 1 sch.schoolID V Ascending V						
Tier 2 V Ascending V						
Tier 3 Ascending V						
Tier 4						
Tier 5 🗸 Ascending 🗸						
Aggregate/Sub Total byAggregate Type						
Save To:      User Account						
Folder / V						
O User Groups						
Force Order 7						
Save Save & Test Return To List						
	< Back Next >					

### Step 6. Save the Filter

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To quickly save the filter, click the **Save** button. To quickly save and verify the filter's return data, click the Save and Test button. Both options save the filter and can be found in the Saved Filter list. The Save and Test option saves the filter and generates it in HTML format for a quick review of the selected fields and format. Users must have pop-ups enabled on the web browser in order to view Test results.

For more advanced save features, follow the procedures below.

- Determine if the filter needs to be saved to a User Account Folder. If yes, choose that radio button and select the appropriate folder.
- Determine if the filter needs to be available to particular User Groups. If yes, choose that radio button and select the appropriate user groups. If a filter is saved to more than one User Group, a separate copy is stored for each group. Each group can independently edit the filter without affecting another group's copy.

User Groups in which you are a member are the only groups that will be displayed. You cannot add a filter to a User Group if you are not already a member.



3. For complicated filters that report data from several calendars and/or have many fields from many different areas, mark the **Force Order** checkbox. When marked, the database fields in the query are executed in a particular order to increase the filter's performance. When a filter takes several minutes to generate, try generating it again with this checkbox marked. Marking this on every filter is not recommended.

4. Select the **Save** icon. The filter is now saved and can be selected from the **Saved Filter** list on the main page of the Filter Designer.

Ad Hoc Filter Designer							
This wizard will walk you through the creation of a new filter. Filters can be created using the Query wizard, selection editor or a pass-through SQL Query. Ad Hoc Filters can be used as a search, or as input to a report.							
d     student aw       Q     student aw       Q     student fail       Q     st	bb, Jos contact log vard hall ki Test Frye Elementary 22-23 P School fields test 2 sley SIS-167116 IKE - Arizona Filter - Two Students al S-166745Lesley is me 21course te 21st CCLC out 15 udent. AlMStests st Filter 104 MA-2023-04-03-16-00-39-C:/CampusDocurr MM-2023-05-05-15-28-52-C:/CampusDocurr HER Test Copy Delete Export	Create New  Filter Type  Query Wizard Selection Editor Pass-through SQL Query Create	Data Type Student Census/Staff Course/Section				

#### To generate a saved filter:

- 1. Select the desired filter from the Saved Filter list.
- 2. Choose the appropriate Calendar.
- 3. Click the **Test** button. The filter will appear as a report in a separate window.

Calendars cannot be selected if the query is for Census/Staff Data Types. Only calendars to which the user is assigned calendar rights are available for selection.



Ad Hoc Filter Designer				
This wizard will walk you through the creation of a new filter. Fil	Iters can be created using the Query	vizard, selection editor or a pass-throug	gh SQL Query. Ad Hoc Filters can be used as a	search, or as input to a report.
Saved Filter          G. student 21colo2         G. student Abb, Jos contact log         G. student award         G. student email         G. student Erik Test Frye Elementary 22-23         G. student IEP School fields	test04			
Q       student jw test 2         Q       student Lesley SIS-167116         Image: Student LUKE - Arizona Filter - Two Students         Q       student seal         Q       student SIS-166745Lesley	Created On 06/08/2023 By Administrator, System Create New	Last Updated On 06/08/2023 By Administrator, System	Last Run On 06/08/2023 By Administrator, System	
Q     student sme 21st CCLC       Q     student Stout 15       Q     student student_AIMStests       C     student Tell Filter       Q     student telst04       Student UAM-2023-04-03-16-00-39-C/CampusDocun       E     student UAM-2023-06-05-15-28-52-C/CampusDocun	Filter Type O Query Wizard O Selection Editor O Pass-through SQL Query Create	Data Type Student Census/Staff Course/Section		
Create a new Folder Which calendar(s) would you like to include in the report?     eactive year     Its by school				
Iist by year       2023-24       2023-24 Core School 1       2023-24 Core School 2       2023-24 Unicensed School       2024-AA TEMPE - REGULAR       2024 - AAG - REGULAR       2024 - AAG - REGULAR       2024 - AAG - REGULAR       2024 - ABAC - REGULAR       2024 - ABCE - REGULAR       2024 - ACC - REGULAR				
2024 - ACESP - REGULAR 2024 - ACEST - REGULAR 2024 - ACPE - REGULAR 2024 - ACPO - REGULAR 2024 - AJHS - REGULAR 2024 - ANDE - 4 DAY 2024 - ANDE - 4 DAY 2024 - ANDE - 5 DAY ▼ CTRL-click or SHIFT-click to select multiple				

# **Manage Filters**

Save Filters to Folders | Remove Fields from the Filter Parameters Editor | Create Folders for Filters | Add a Saved Query to a Folder | Move Filters between Folders | Copy Filters | Delete Filters | Modify a Query Created by Another User | Test Saved Filters | Last Updated, Last Run, and Last Run By Information

### **Save Filters to Folders**

Ad hoc filters can be saved to specific folders created within the Filter Designer tool, User Accounts, or User Groups.

For complicated filters that report data from several calendars and/or have many fields from many different areas, mark the **Force Order** checkbox. When marked, the database fields in the query are executed in a particular order to increase the filter's performance. When a filter takes several minutes to generate, try generating it again with this checkbox marked. Marking this on every filter is not recommended.

*Query Nar	me: Test Filter			
Short Desc	cription: This field is	used to enter instruction	ons or a short description of the filter. Maximum of 140 characters	
Long Desc	ription: This field is	used to enter more de	tails about the filter. Maximum of 1000	
Filter the o	lata			
1	D*Field	Operator	Value	
$\mathbf{X}^{-1}$	sch.schoolID 🗸	~		
$\mathbf{X}^{-2}$	2 sch.districtID 🗸	>= 🗸	sch.schoolID	
× ª	3 sch.number 🗸	~		
Add				
	xpression (Optiona	.n.		
	xpression (optione	<i>n</i> j.		
If is signified.			and the d	
Allowed sy	mbols: AND OR NC	nk, all operators will be )T ( ) IDs R 3) AND 4 AND (NOT		
Example a	Syntax. (TAND (2 OI	K 3) AND 4 AND (NOT	5 (K 0))	
Save To:	User Account			
cure re.	Folder: /	~		
	0			
	O User Groups			
	🗌 Force Order 🕻			
Save	Save & Test	Return To List		
				< Back Next >

# **Remove Fields from the Filter Parameters Editor**

Fields can be removed from the Filter Parameters editor without being removed from the filter as a whole. This allows users to reduce the Filter Parameters editor to only those fields in which operators are assigned or only those fields in which the user wants to see.

Fields removed from the Filter Parameters editor are not removed from the filter; they are only the user's view of the editor.

*Query N	lam	e: Test Filter			
Short De	escri	ption: This field is	used to enter instruction	ons or a short description of the filter. Maximum of 140 characters	
Long De:	scri	ption: This field is u	used to enter more de	tails about the filter. Maximum of 1000	÷
Filter the	e da	ita			
<b>_</b>	ID	*Field	Operator	Value	
×	1	sch.schoolID 🗸	~		
×	2	sch.districtID 🗸	>= 🗸	sch.schoolID	
$\mathbf{x}$	3	sch.number 🗸	~		
Add					
Logical	Ex	pression (Optiona	ıl):		
Allowed	syn	nbols: AND OR NO			
Example	e Sy	ntax: (1 AND (2 OF	R 3) AND 4 AND (NOT	5 OR 6))	
Save To:		User Account			
		Folder: /	~		
		O User Groups			
		Force Order 🗹			
Save		Save & Test	Return To List		
Jave		Jave & lest			
					< Back Next >

Select the X next to each field to remove fields from the Filter Parameters Editor.

Removing a field from the list does not remove it from the filter output.

All fields not assigned an Operator were removed, and the field IDs were automatically renumbered. The Logical Expression automatically updates to match new field IDs.

The Filter Designer tool allows users to create folders for organizing and storing Ad hoc filters. Folders can be organized in a hierarchy format, where sub-folders exist within parent folders. By creating folders, users can better manage large volumes of existing Ad hoc filters and group them in a logical order.

If a field in the query has been deactivated (displays in red), use the <u>Element Replacement</u> <u>Tool</u> to update the filter. This removes the deactivated field and adds the equivalent field to the filter.



## **Create Folders for Filters**

Folders allow users to better manage Ad hoc filters within the Filter Designer tool.

Saved Filters	Create New		
Image: State Published         Image: The Published	Filter Type Ouery Wizard Selection Editor Pass-through SQL Query Create	Data Type Student Census/Staff Course/Section	
Search Edit Test Copy Delete Export			

Click here to expand...

To create a new folder, select the **Create a new Folder** button. The **Create a new folder** editor displays.

ed Filters student Copy of Test Filter	Create New	
student Test Filter Counselors	Create a new folder	ata Type
	Parent Folder: (No Parent)	) Student ) Census/Staff ) Course/Section
	Folder Hume. Test Folder	
		Save Cancel

Campus

If the folder should not be tied to a parent folder, leave the **Parent Folder** field as (No Parent), enter a **Folder Name** and select the **Save** button. The folder displays in the **Saved Filters** field and is now available for storing Ad hoc filters.

If the folder should be assigned to a parent folder, select the parent folder from the **Parent Folder** field.

Ad Hoc Filter Designer This wizard will walk you through th used as a search, or as input to a re		rd, selection editor or a pass-through SQL Query. Ad Hoc Filters can be
Saved Filters  Test Folder  Child Test Folder  Child Test Folder  Child Test Folder 2  Student Copy of Test Filter	Copy of Test Filter This is a test filter. This is where a desi Last Updated 05/04/2011	cription appears.
<ul> <li>Student Test Filter</li> <li>         ⊕ Counselors          ⊕ Test Filter      </li> <li>         ⊕ Test Filter      </li> <li>         State Published     </li> </ul>	Create a new folder Parent Folder: (No Parent) Folder Name: (No Parent) -:Test Folder -:Child Test Folder 2	e e snt us/Staff se/Section
Search Edit Test Copy (	Save	Cancel
Create a new Folder	Selecting a Parent Fo	Ider

Locate the appropriate parent folder. The indentation next to each folder name indicates its



relationship to the previous folder (*i.e.*, the Grandchild 1 folder is indented two times because it exists within the Child 1 (Testing) folder which exists within the Parent Folder (Testing) folder). In the example above, the folder being created exists within the Child Test Folder parent folder.

d Hoc Filter Designer		
This wizard will walk you through th used as a search, or as input to a re		izard, selection editor or a pass-through SQL Query. Ad Hoc Filters can b
Saved Filters	Copy of Test Filter	
Child Test Folder      Did Test Folder      Did Test Folder	This is a test filter. This is where a d	lescription appears.
student Copy of Test Filter	Last Updated 05/04/2011	
<ul> <li></li></ul>	Create a new folder	*
	Parent Folder: -: Child Test Folder 🗸	e
	Folder Name: Test Folder - Tim	
		∺nt us/Staff
	1	us/statt se/Section
	1	Ser Section
	Sav	e Cancel
Search Edit Test Copy ( Create a new Folder	Delete Export	
	Entering a Folder No	ame

Once the parent folder has been selected, it displays in the **Parent Folder** field. Enter the **Folder Name** of the folder being created and select the **Save** button. The folder displays in the Saved Filters field and is now available to store Ad hoc filters.

Saved Filters  Test Folder  Child Test Folder 2  Test Folder - Tim  student Copy of Test Filter  student Test Filter  Student Test Filter  State Published	Copy of Test Filter This is a test filter. This is where a Last Updated 05/04/2011 Create New Filter Type Query Wizard Selection Editor Pass-through SQL Query Create	description appears. Data Type Student Census/Staff Course/Section	



As the example above shows, the created folder Test Folder - Tim now exists within its parent folder Child Test Folder.

## Add a Saved Query to a Folder

Once folders have been created, Ad hoc filters can now be assigned to those folders.

Ad Hoc Query Wizard - Filter Parameters	
Query Name: Test People	
Short Description:	
Long Description:	Ŧ
Filter the data	
Field Operator Value	
individual.lastName = Test	
individual.studentNumber	
individual.staffNumber	
individual.staffStateID	
Save To:      User Account     Folder: /	
O User Groups	
Save Save & Test Return To List	
	< Back Next >

Saving an Ad hoc Filter to a Folder

To assign an Ad hoc filter to a folder, click the **User Account** radio button and select the folder from the **Folder** field.

Query Name: Tes	st People						
Short Description:					 		
Long Description:						+	
Filter the data							
Field	Operator	Value					
individual.lastName	=	▼ Test					
individual.studentNum		-					
individual.staffNumber	·	-					
individual.staffStateID		-					
Save To: 💿 User.	Account						
Folde	er: /			-			
O User	-:Nate Tes -:Parent Folder (T	st 3 "esting)					< Back Next
		nild 1 at Grandch Great Great -:Great G nild 2 ting) ting)	t Grandchild 1 Great Great Grandchild				
	-: Test Folder	- Tim	6				

Campus

In the example above, the Ad hoc filter is being assigned to the Test Folder - Tim folder.

Ad Hoc Query Wizard - Filter Parameters	
Query Name: Test People	
Short Description:	
Long Description:	+
Filter the data	
Field Operator Value	
individual.lastName = Test	
individual.studentNumber	
individual.staffStateID	
Save To:  User Account Folder: -: Test Folder - Tim	
O User Groups	
Save & Test Return To List	
	< Back Next >
Saving the Ad hoc Filter to a Folder	

Once the folder is selected, the **Folder** field displays the folder name. Select the **Save** button to save the filter to the folder.

Hoc Filter Designer This wizard will walk you through the creation of a ne used as a search, or as input to a report.	ew filter. Filters can be created using the Que	ry wizard, selection editor or a pass-through SQL Qu	ery. Ad Hoc Filters car
aved Filters	Copy of Test Filter		
Mary     Mary     Mary Testing     Nate Test	This is a test filter. This is when	e a description appears.	
Parent Folder (Testing)     Testing 1 2 3     Test Folder - Tim	Last Updated 05/04/2011		
person Test People     student Aanenson, Jacqueline behavior     person Federal Race Ethnicity	Filter Type	Data Type	
student * 0 SIS-17888 student * JJ percent	O Query Wizard	◯ Student	
student * Jo percent student * Mary Testing Enrollment History	Selection Editor	Census/Staff	
person * Mary Testing SIS-35090 student *** 000 Mary Neville	Pass-through SQL Query	Course/Section	
student *** 001 Mary Neville	Create		
person *Between     student *GPA between			
student *SIS-27122			
student .Fees			
student .HOV	*		
< <u> </u>			
Search Edit Test Copy Delete E	xport		
Create a new Folder			

The Ad hoc filter is now saved and accessible within the assigned folder.

#### **Move Filters between Folders**

Ad hoc filters can be easily moved and organized between folders.

Ad Hoc Filter Designer This wizard will walk you through the creation of a be used as a search, or as input to a report.	new filter. Filters can be created using the Query w	izard, selection editor or a pass-through SQL Query. Ad H	oc Filters can
Saved Filters			
Test Folder	Create New		
Child Test Folder  Child Test Folder 2  Child Test Folder 2	Filter Type	Data Type	
Test Folder - Tim     student Copy of Test Filter	O Query Wizard	◯ Student	
student Test Filter	Selection Editor	Census/Staff	
student Test Filter 2	O Pass-through SQL Query	Course/Section	
± 4 State Published	Create		
Search Edit Test Copy Delete	Export		
Create a new Folder			
			_
	Moving an Ad hoc Filter to	a Folder	

To move an Ad hoc filter into an existing folder, left-click, hold, and drag the filter into the



designated folder. A pop-up message displays, asking the user to confirm the action. Select the  $\mathbf{OK}$  button to move the Ad hoc filter.

Ad Hoc Filter Designer This wizard will walk you through the creation of a new filte be used as a search, or as input to a report.	r. Filters can be created using the Query wiz	ard, selection editor or a pass-through SQL Query. Ad Hoc	Filters can
Saved Filters			
🗆 🧰 Test Folder	Create New		
Child Test Folder  Student Test Filter 2  Child Test Folder 2  Child Test Folder 2	Filter Type	Data Type	
Child Test Folder 2      Test Folder - Tim	Query Wizard	© Student	
student Copy of Test Filter	© Selection Editor	Census/Staff	
Student Test Filter	O Pass-through SQL Query	Course/Section	
	Create		
Search Edit Test Copy Delete Export			
Create a new Folder			
l	/iewing a Moved Ad hoc	Filter	

The moved filter now displays under the appropriate folder. This functionality moves filters in, out, and to another folder.

Existing filters can be easily copied if desired. This maintains the original version of the filter and lets users change a filter to add new fields and functions.

## **Copy Filters**

Filters can be copied for additional editing. Select a saved filter and click the **Copy** button. A popup message displays indicating the filter has been copied. Copied filters are named Copy of [Original Filter Name].

Ad Hoc Filter Designer			
This wizard will walk you through the creation of a new f used as a search, or as input to a report.	ilter. Filters can be created using the Query	wizard, selection editor or a pass-through SQL Quer	y. Ad Hoc Filters ca
Saved Filters	Test Filter		
student Copy of Test Filter     student Test Filter	This is a test filter. This is where a description appears.		
	Last Updated 05/04/2011		
	Create New		
	Filter Type	Data Type	
	© Query Wizard	Census/Staff	
	Pass-through SQL Query	Course/Section	
	Create		
Search Edit Test Copy Delete Export			

#### **Delete Filters**

A saved filter created by a user can also be deleted by that user. However, because filters can be shared with other users, only the person who created the filter can delete it.

District users cannot delete State-Published filters.

ved Filters	Test Filter This is a test filter. This is where a	description appears.		
Counselors	Last Updated 05/04/2011	Last Updated 05/04/2011		
	Create New	Create New		
	Filter Type	Data Type		
	© Query Wizard	© Student		
	Selection Editor Pass-through SQL Query	Census/Staff		
	Create	Course/Section		

Select a filter from the Saved Filters window and click the Delete button to delete it. A pop-up message confirms the deletion. You can also delete multiple filters by holding the **Ctrl** key, selecting each filter, and clicking the **Delete** button.

## Modify a Query Created by Another User

Saved filters can be edited anytime by selecting the filter and clicking the **Edit** button. This displays the filter so users can modify the selected fields and verify the operations and export options.

Search results on the Search tab can be populated with saved filters. When a saved filter is selected, click the **Search** button. Results returned in the filter displays in the Search tab.

idex Search Help	Ad Hoc Filter Designer	
Idex         Search         Help           earch for a:         Student         Image: Constraint of the search	This wizard will walk you through the creation of a new file a pass-through SQL Query. Ad Hoc Filters can be used as a Saved Filters Saved Filters Student Test Filter Student Tree/Reduced/None (Paid) Lunch Status student Free/Reduced/None (Paid) Lunch Status student Free/Reduced/None (Paid) Lunch Status student Grade 12 Seniors - Primary Enrollments curriculum Kuder student test student test student test student test student WJHS Faling Report 0-69 Progress Rep student WJHS Faling Report 0-69 Progress Rep student WJHS Faling Report 0-69 Progress Rep	ard, selection editor or Data Type
	Search Edit Test Copy Delete Export Create a new Folder	

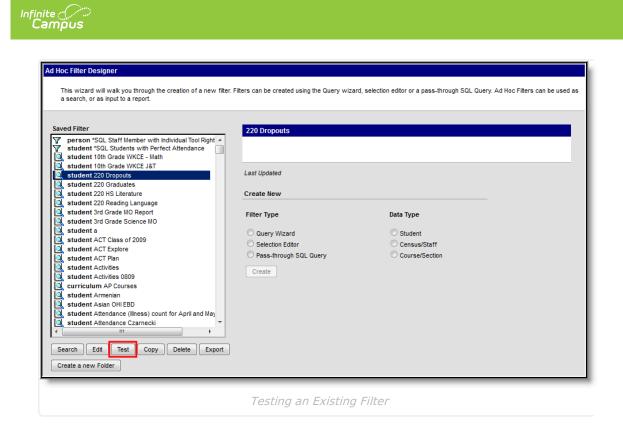
If a saved filter contains deprecated fields, the filter is highlighted in red within the Saved Filters window.

aved Filters	JL	J Test 00		
student idol student ima test hoccer student Jena student Jena student Jilihihi student iii student iii student kid student kid student Mac Kator student M	Cre no longer avail. sed for historic		Data Type Student Census/Staff Course/Section	

#### **Test Saved Filters**

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Select the filter from the Saved Filter window to test an existing filter and click the **Test** button. A separate window displays, displaying filter results in HTML format.



# Last Updated, Last Run, and Last Run By Information

Users can view the last time an existing filter was updated, the last time a test of the filter was run, and who ran the last test of the filter.

If the timestamp or user is unknown, a value of Unknown is reported.

