Create a Selection Editor filter

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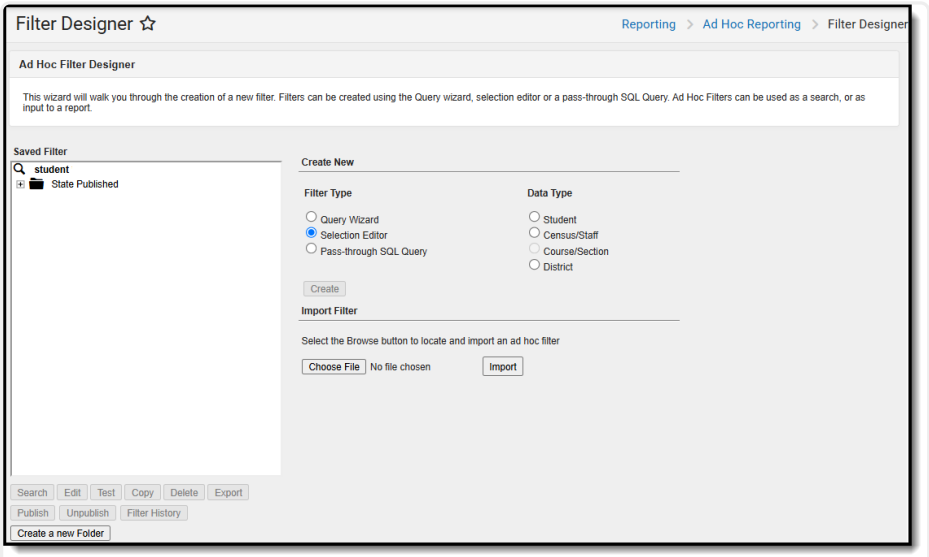
Path: Reporting > Ad Hoc Reporting > Filter Designer

Use the Selection Editor to create static filters that contain specific students, people, or districts. Saved selection filters can be used in reporting tools and other processes, such as attendance tracking, letter generation, and data exports.



Create, organize, and import ad hoc filters for reporting and data searches.

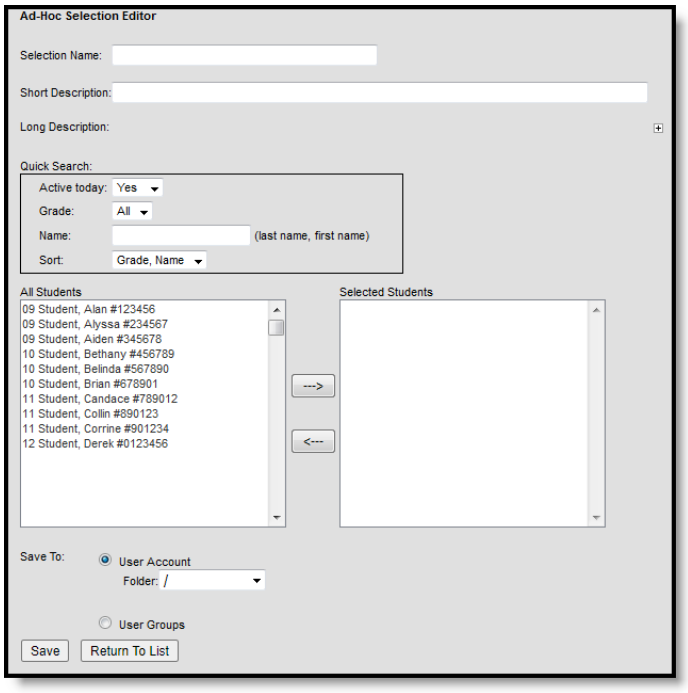
Before you start

- Selection Editor filters:
  - Include **Student**, **Census/Staff**, or **District** (State Edition only) options. Course/Section is grayed out and not available for selection.
  - Can only be saved when more than one person or student is selected. If you only need one individual, search for that person in Census or Student Information instead.
  - Are static. Changes to membership must be made manually after the filter is created.
- Set appropriate tool rights. Refer to the Filter Designer Tool Rights article for more information.

Create a student selection filter

1. Select **Selection Editor** as the **Filter Type**.
2. Select **Student** as the **Data Type**.
3. Click **Create**. A list of students displays. By default, students are listed by grade, last name, and first name. Active and inactive students are included.

4.



Enter a **Selection Name** and optional descriptions.

5. Use the search and filtering options to locate students:

    - **Active Today**
        - **Yes**: Displays students with active enrollments.
        - **No**: Displays students without active enrollments. Inactive students are displayed in red.
        - **Both**: Displays all students regardless of enrollment status.
    - **Grade**: Filters students by grade.
    - **Name**: Filters students by last name or first name as you type.
    - **Sort**: Sorts students by grade and name or by name only.

6. Select students from the **All Students** list and move them to **Selected Students** using the right arrow.

7. Remove students by moving them back to the left list using the left arrow.

8. Choose where to save the filter:

    - **User Account** to save to your account or a folder.
    - **User Groups** to save one or more copies for user groups. Each group receives its own editable copy.

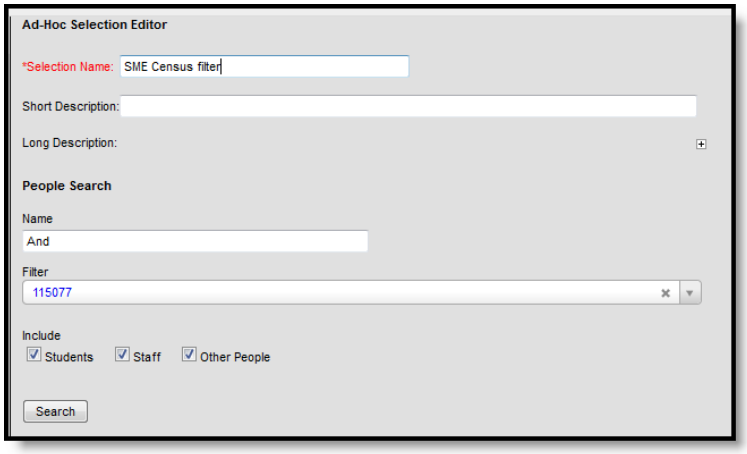
9. Click **Save**.

Impact

The filter appears in the **Saved Filters** list and can be used in reporting processes. The selection remains unchanged until it is manually updated.

Create a Census/Staff selection filter

1. Select **Selection Editor** as the **Filter Type**.
2. Select **Census/Staff** as the **Data Type**.
3. Click **Create**.



4. Enter a **Selection Name** and optional descriptions.
5. Search for people to include in the filter:
    - Enter part of a name in the **Name** field.
    - Optionally select an existing filter from the **Filter** dropdown.
    - Use both fields together to return only matching records from the selected filter.
6. Select at least one search category:
    - Students
    - Staff
    - Other People
7. Click **Search**. Results are limited to the set search limit selected in System Preferences.
    - **Name**: Click on the individual's name to display the Person Summary Report.
    - **Show**: Click the relevant label to display information associated with the person, including relationships, teachers, sections, and caseload.
    - Use the **Back to Search** or **Back to Results** links displayed in blue to navigate.
8. Add individuals from the results using **Add,** or add all results using **Add All**.
9. Remove individuals using **Remove** or **Remove All** as needed.

10. Click **Save**.

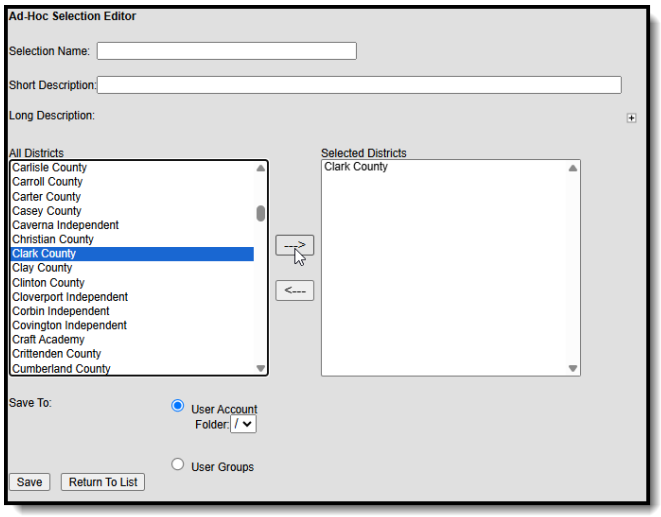
Impact

The filter is added to the **Saved Filters** list and can be reused in other tools. The selection remains static until manually modified.

Create a district selection filter

State Edition only.

1. Select **Selection Editor** as the **Filter Type**.
2. Select **District** as the **Data Type**.
3. Click **Create**.



4. Enter a **Selection Name** and optional descriptions.
5. Move districts from the available list to the selected list using the arrow controls.
6. Select a **Save To** option:
    - **User Account**
    - **User Groups**
7. Click **Save**.

Impact

The district filter appears in the **Saved Filters** list and is available for future reporting activities.

What's next

- Use the saved filter in the Letter Builder to generate targeted communications.
- Use the saved filter in Data Export to export records for selected users.
- Organize filters into folders using the filter management features in Filter Designer.