

Ad Hoc Reporting

Release Pack 1845

Eastern Suffolk BOCES
December 2018

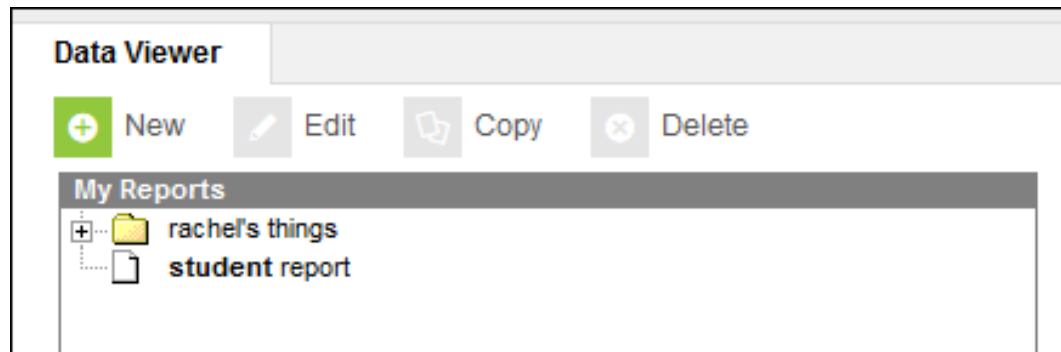
Overview and Agenda

- What is Ad Hoc Reporting?
 - Canned reports provided by Infinite Campus are usually generalized, reporting the most common information required by the majority of Campus district users. Ad hoc reports allow you to pull user-defined detail information from several areas of Infinite Campus into one report. Many canned reports can also be filtered with ad hoc selections.
 - Today's activities:
 - Data Viewer report creation
 - Filter types and creation
 - Inserting a Function
 - Using the Add button and Deleting fields
 - Adding Logical Expressions to your results
 - Query Wizard result formatting
 - Data Exporting
 - Letter Designer creation
 - Letter Builder creation
 - Advanced Searching
 - Sharing filters in the outline

Data Viewer

Ad Hoc Reporting> Data Viewer

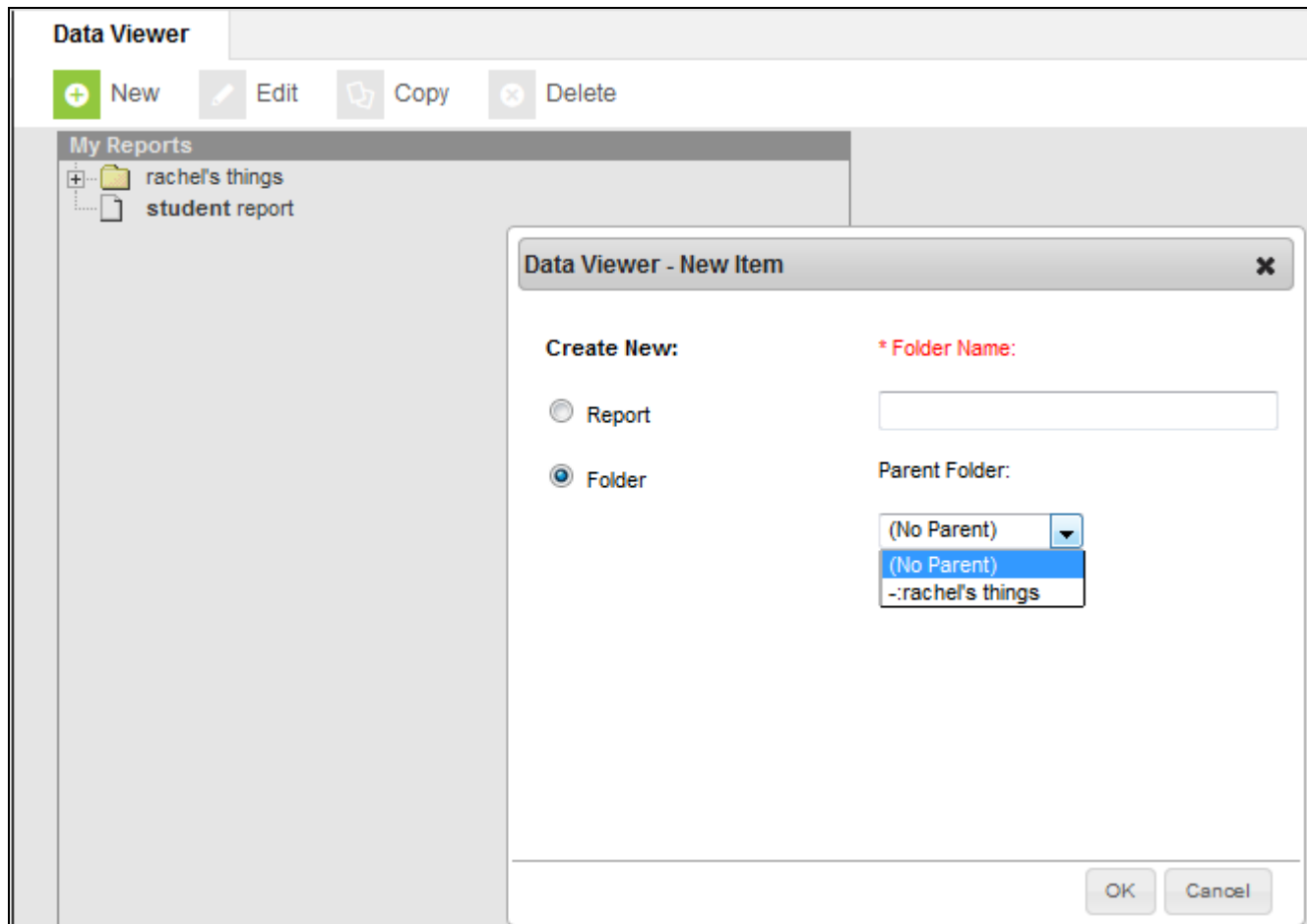
- Data Viewer is a way to make simple reports without the complexity of the ad hoc query wizard. It doesn't have all of the query wizard capabilities, but it is easy to learn and then teach to a novice user.
- The reports use the same views as the more complex query wizard, based on the user's access rights: student, census/staff, or course/section.
- Reports save only to the useraccount (no sharing).
- Reports have the same basic functions as filters , based on the user's access rights: Edit, Copy, Delete, ability to sort in folders.
- Reports display in PDF, CSV, or HTML (webpage) formats.
- Reports can be displayed in comparison to an existing filter.



Data Viewer

- Click New

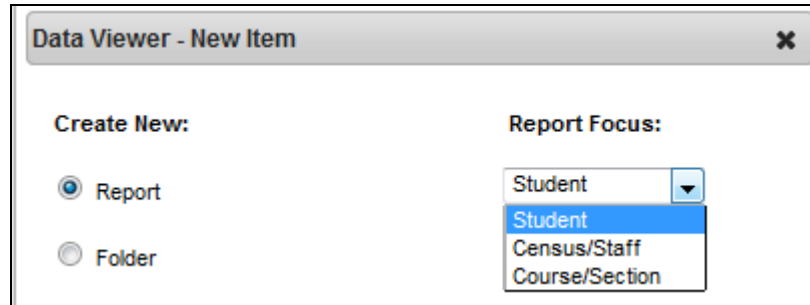
- Create a new folder.
- Folder
 - Name the folder and select whether it should be nested inside another folder.
 - Move filters and folders using drag and drop.



Data Viewer

- Click New

- Create a new report.
 - Select data set.



Data Viewer - New Item

Create New:

☒ Report

☐ Folder

Report Focus:

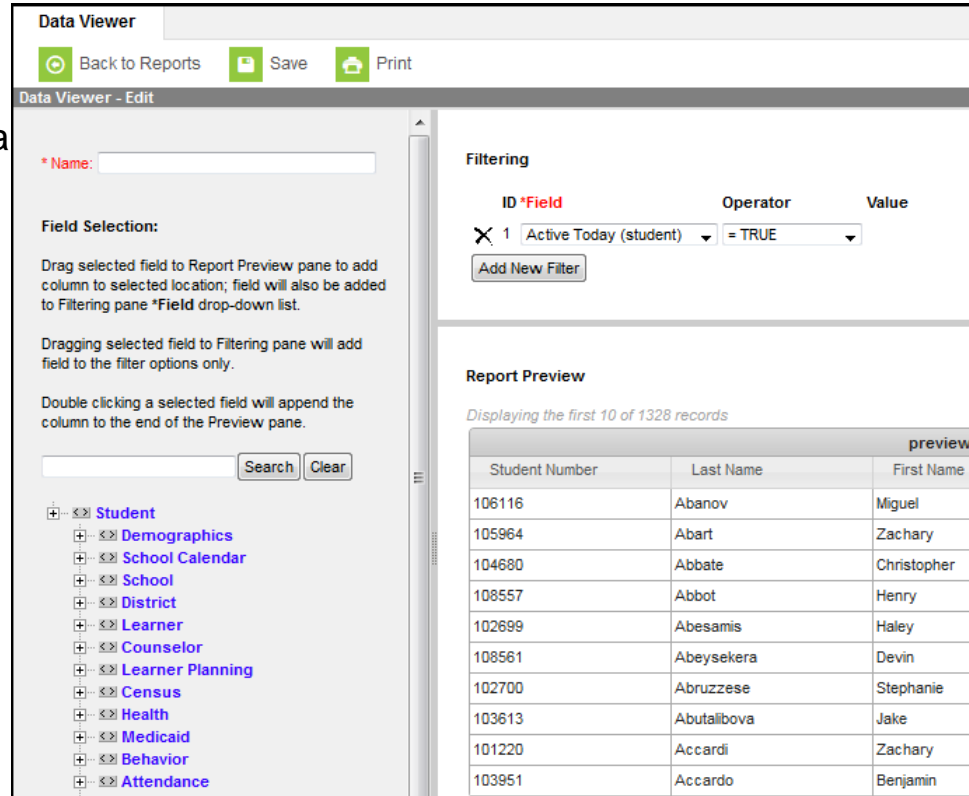
Student

Student

Census/Staff

Course/Section

- Give the report a name (must be unique).
- The basic identifier fields are pre-selected based on your data set.
- Search for additional fields using search/clear boxes or by using expand/collapse plus-minus boxes.
- Add fields by selecting using double-click or drop and drag.
- Filter fields by clicking Add New Filter; basic operators are available based on field data type. Functions and Logical Expressions tools are not available here.



Data Viewer

Back to Reports Save Print

Data Viewer - Edit

* Name:

Field Selection:

Drag selected field to Report Preview pane to add column to selected location; field will also be added to Filtering pane *Field drop-down list.

Dragging selected field to Filtering pane will add field to the filter options only.

Double clicking a selected field will append the column to the end of the Preview pane.

Search Clear

Filtering

ID *Field Operator Value

1 Active Today (student) = TRUE

Add New Filter

Report Preview

Displaying the first 10 of 1328 records

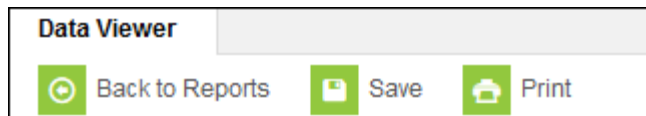
Student Number	Last Name	First Name
106116	Abanov	Miguel
105964	Abart	Zachary
104680	Abbate	Christopher
108557	Abbot	Henry
102699	Abesamis	Haley
108561	Abeysekera	Devin
102700	Abruzzese	Stephanie
103613	Abutalibova	Jake
101220	Accardi	Zachary
103951	Accardo	Benjamin

Data Viewer

- Drag column headers to re-sort left to right order.
- Remove, sort, and group columns by clicking on preview-window column headers.
- Top ten results are displayed, report must be generated for full results.

preview			
Student Number	Last Name	First Name	Start Status
106116		Miguel	0011
105964		Zachary	0011
104680		Christopher	0011
108557		Henry	0011
102699	Abesamis	Haley	0011
108561	Abeysekera	Devin	0011
102700	Abruzzese	Stephanie	0011
103613	Abutalibova	Jake	0011
101220	Accardi	Zachary	0011
103951	Accardo	Benjamin	0011

- Tool selections are Back to Reports (navigate away,) Save, and Print.
 - Print saves the report similarly to “save and test.” Print from the report creation or “edit” view defaults to a PDF print with the report header field.



Data Viewer

- Once a report is saved, it can be re-used to print, copy, or be deleted. The user may re-print the report by filtering with an existing Query Wizard filter.
 - Select the report. Select the ad hoc filter name (if desired) and then choose an export format. Click Generate Report.
 - Calendar selections are less strict with Data Viewer, however, opposing calendar selections (header calendar vs. filter calendar) may cause some report issues.

The screenshot displays the 'Data Viewer' application window. At the top, there is a toolbar with four icons: a green plus sign for 'New', a green pencil for 'Edit', a green document icon for 'Copy', and a green X for 'Delete'. Below the toolbar is a 'My Reports' section with a tree view containing two items: 'rachel's things' (a folder icon) and 'student report' (a document icon, which is currently selected and highlighted in blue). To the right of the 'My Reports' section is the 'Report Options' panel. This panel contains the following information: 'Report Name: report' with 'Last Updated 09/15/2014' to its right; 'Ad Hoc Filter:' with a dropdown menu showing 'CAMPUS COMMUNITY SAMPLE perfect attendance'; 'Report Output Format:' with a dropdown menu showing 'PDF'; and a 'Generate Report' button. At the bottom right of the 'Report Options' panel, it states 'Engine Version: 2.0' and 'Minimum supported engine version: 2.0'.

Filter Designer

- Query Wizard – create a dynamic (real-time) filter by selecting specific data fields to be used for generating custom reports, report cards, mailings, etc.
- Selection Editor – select a static (unchanging) group of students for whom a report/letter can be run.
- Pass-Through SQL Query - use with basic SQL programming language and Campus schema knowledge to build queries from the three data sets.
- Three data set return options: Student, Census/Staff, or Course/Section (based on users' access rights).

Index Search Help

Rachel WALSH

- All SSRS Reports
- InfiniteCampus eBoard
- Student Information
- Instruction
- Census
- Behavior
- Health
- Attendance
- Scheduling
- Fees
- Grading & Standards
- Medicaid
- Programs
- Ad Hoc Reporting
- Filter Designer**
- Letter Designer
- Letter Builder
- Data Export
- Data Analysis

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 to a report.

Saved Filter

- programs extracts
- student find me some kids!
- student regents extract

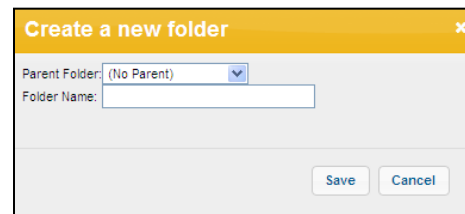
Create New

Filter Type	Data Type
<input type="radio"/> Query Wizard	<input type="radio"/> Student
<input type="radio"/> Selection Editor	<input type="radio"/> Census/Staff
<input type="radio"/> Pass-through SQL Query	<input type="radio"/> Course/Section

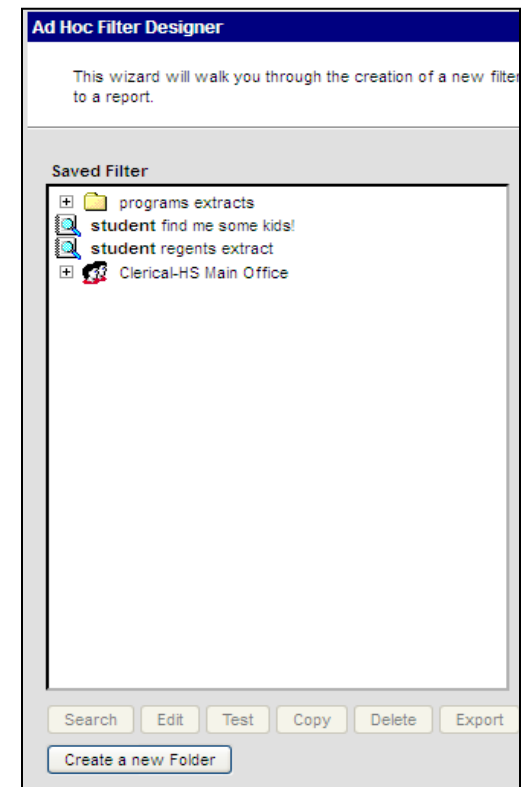
Create

Filter Designer

- The Saved Filter window displays your (accessible to you only) User Account ad hoc folders, then individual filters, and then shared filters (based on your user group memberships). Shared filters, once altered, are altered for the whole group.
- An empty folder can be created by entering a unique name, and folders may be nested within other folders. Folders can't be created within a shared "user group".
- Filters may be edited, tested, copied, deleted, exported and displayed based on user tool right access.
- A filter must be selected for the "action buttons" to become active.
- Results populate in the Index from the Advanced Search tool within Student (student filters), All People (census/staff filters), and Course/Section (course section filters.)



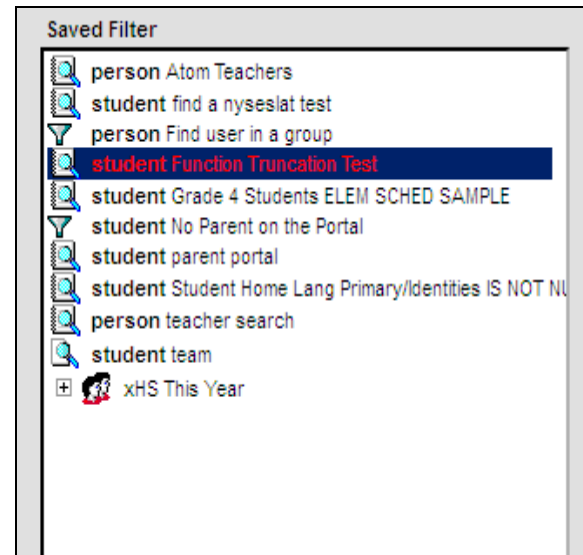
A dialog box titled "Create a new folder" with a close button (X) in the top right corner. It contains a "Parent Folder:" label with a dropdown menu showing "(No Parent)" and a "Folder Name:" label with a text input field. At the bottom right are "Save" and "Cancel" buttons.



A window titled "Ad Hoc Filter Designer" with a blue header bar. Below the header is a message: "This wizard will walk you through the creation of a new filter to a report." Below this is a section titled "Saved Filter" containing a list of filters with expand/collapse icons: "programs extracts", "student find me some kids!", "student regents extract", and "Clerical-HS Main Office". At the bottom of the window is a row of buttons: "Search", "Edit", "Test", "Copy", "Delete", "Export", and a larger "Create a new Folder" button.

Filter Designer

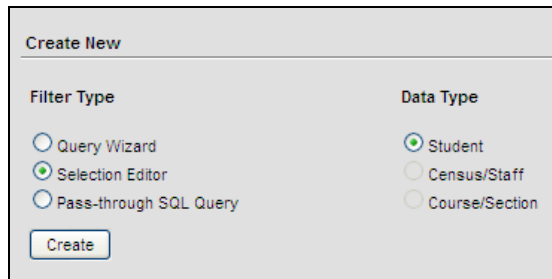
- A filter containing a deprecated field will display in red. It will still be operational, although the deprecated field info will only be historical, since no new data can be saved to the field.
- If you have an ad hoc created to which your tool rights don't allow "read" access, it will generate an error message titled "Security":
 - **Security: Filter contains data that requires one of the following rights: [Student Information > Health > General > Medications, Student Information > Health > General > Health Visits]. Please contact your System Administrator.**



Selection Editor

Ad hoc Reporting>Filter Designer>Selection Editor

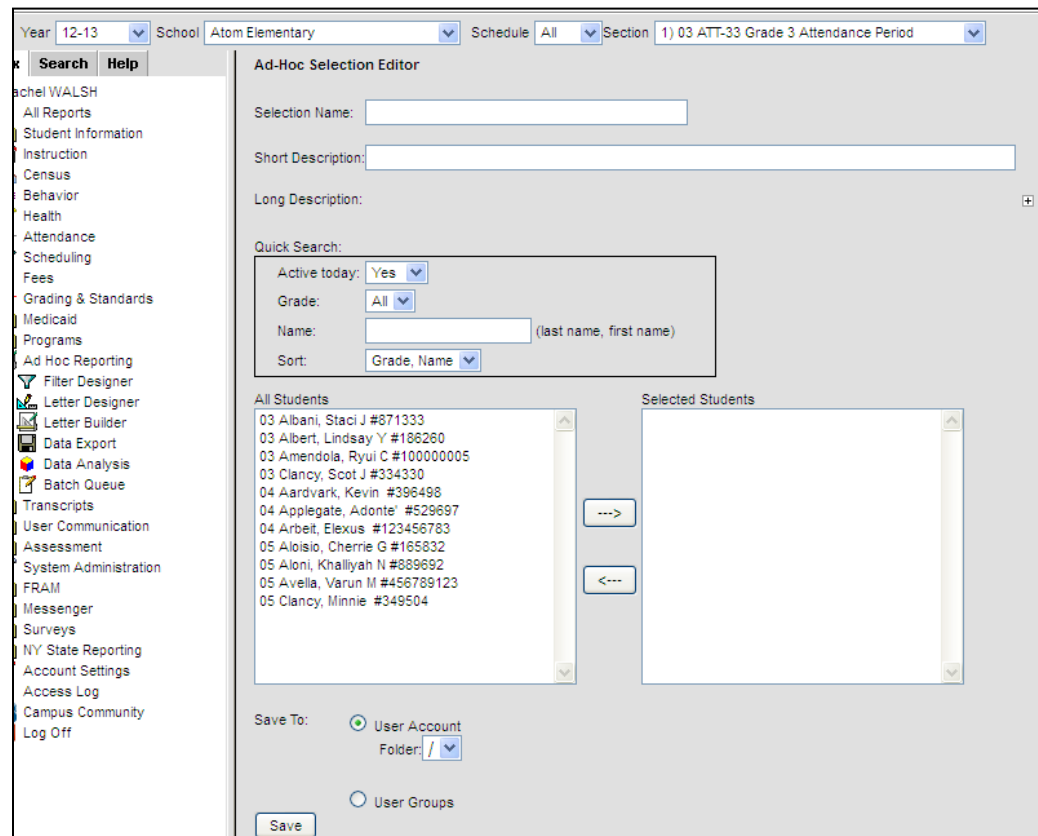
- Student and Census/Staff are the only available Data Sets in this mode.
- Student selection options are driven by the header calendar in which the filter is created.
- Unique name required, description text are boxes optional. A best-practice is to add the calendar name where the filter is created if based on student. This will display on the “saved filters” screen when hovering with the cursor.
- All students contained in calendar are displayed (“no-shows” are excluded!!!). Quick search options narrow the selection list.
- Click and use ← L/R → Arrows to move students, or hold CTRL, click multiple students, and move once.
- Save is the only option, no data filtering is available in this list.



Create New

Filter Type	Data Type
<input type="radio"/> Query Wizard	<input checked="" type="radio"/> Student
<input checked="" type="radio"/> Selection Editor	<input type="radio"/> Census/Staff
<input type="radio"/> Pass-through SQL Query	<input type="radio"/> Course/Section

Create



Year: 12-13 School: Atom Elementary Schedule: All Section: 1) 03 ATT-33 Grade 3 Attendance Period

Search Help

Ad-Hoc Selection Editor

Selection Name:

Short Description:

Long Description:

Quick Search:

Active today: Yes

Grade: All

Name: (last name, first name)

Sort: Grade, Name

All Students

03 Albani, Staci J #871333
03 Albert, Lindsay Y #186260
03 Amendola, Ryui C #100000005
03 Clancy, Scot J #334330
04 Aardvark, Kevin #396498
04 Applegate, Adonte #529697
04 Arbeit, Elexus #123456783
05 Aloisio, Cherrie G #165832
05 Aloni, Khaliyah N #889692
05 Avella, Varun M #456789123
05 Clancy, Minnie #349504

Selected Students

---> <---

Save To: ☒ User Account Folder: /

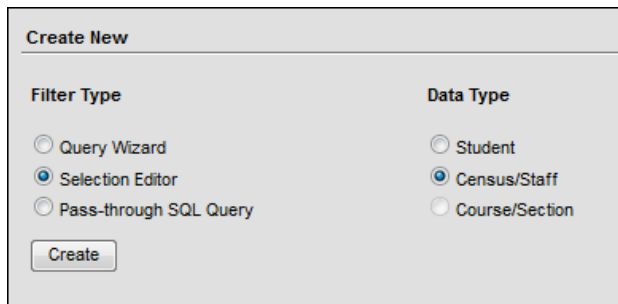
☐ User Groups

Save

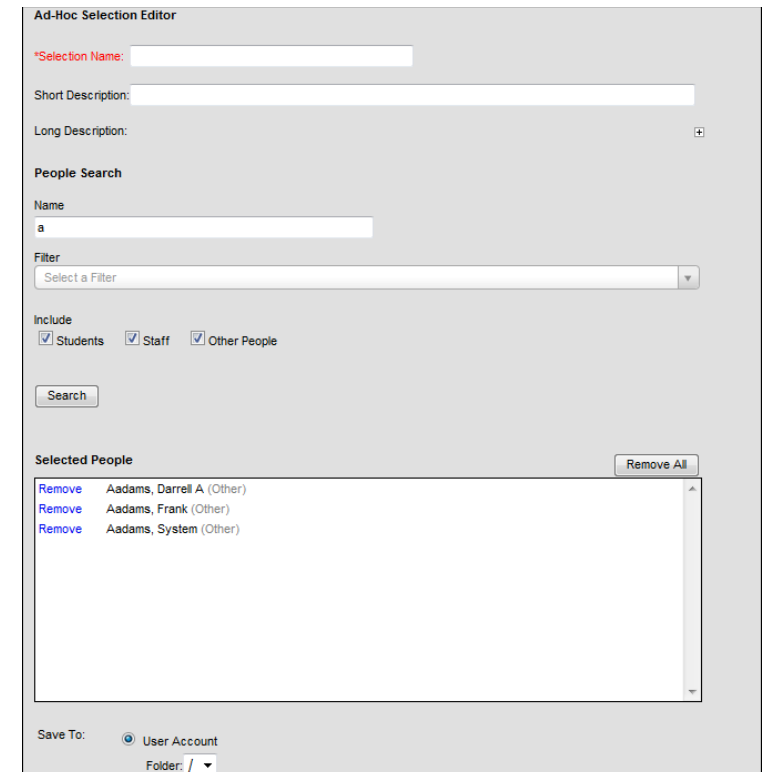
Selection Editor

Ad hoc Reporting>Filter Designer>Selection Editor

- Student and Census/Staff are the only available Data Sets in this mode.
- Census/Staff data set options are driven by census and not limited to the selected calendar.
- Unique name required, description text boxes are optional. This will display on the “saved filters” screen when hovering with the cursor.
- A portion of the name needs to be selected in the text box, or you may select from an ad hoc filter which has already been created, or a combination of the two - the two search fields work in conjunction with one another.
 - i.e. if you search a staff member's name and a student filter at the same time, you will receive 0 persons.
- Click the Add button to add the person to the selection editor list. Clicking the blue name link will display the person summary report. Click the blue Remove link in the selection window to take a person off the list.
 - Each name will have a description of whether they're Student, Staff, or Other
- Save is the only option, no data filtering is available in this list.



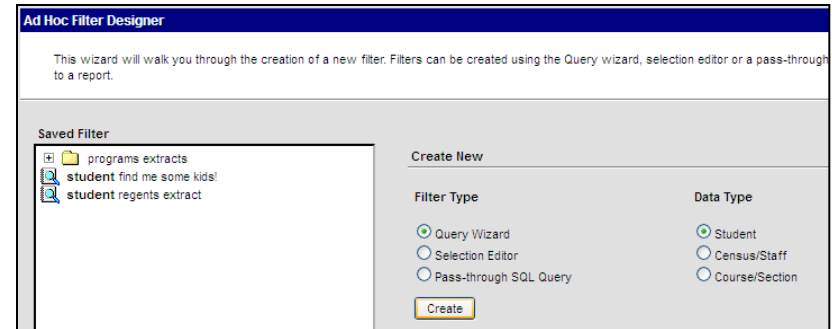
The 'Create New' dialog box has a title bar 'Create New'. It contains two columns: 'Filter Type' and 'Data Type'. Under 'Filter Type', there are three radio buttons: 'Query Wizard', 'Selection Editor' (which is selected), and 'Pass-through SQL Query'. Under 'Data Type', there are three radio buttons: 'Student', 'Census/Staff' (which is selected), and 'Course/Section'. A 'Create' button is at the bottom left.



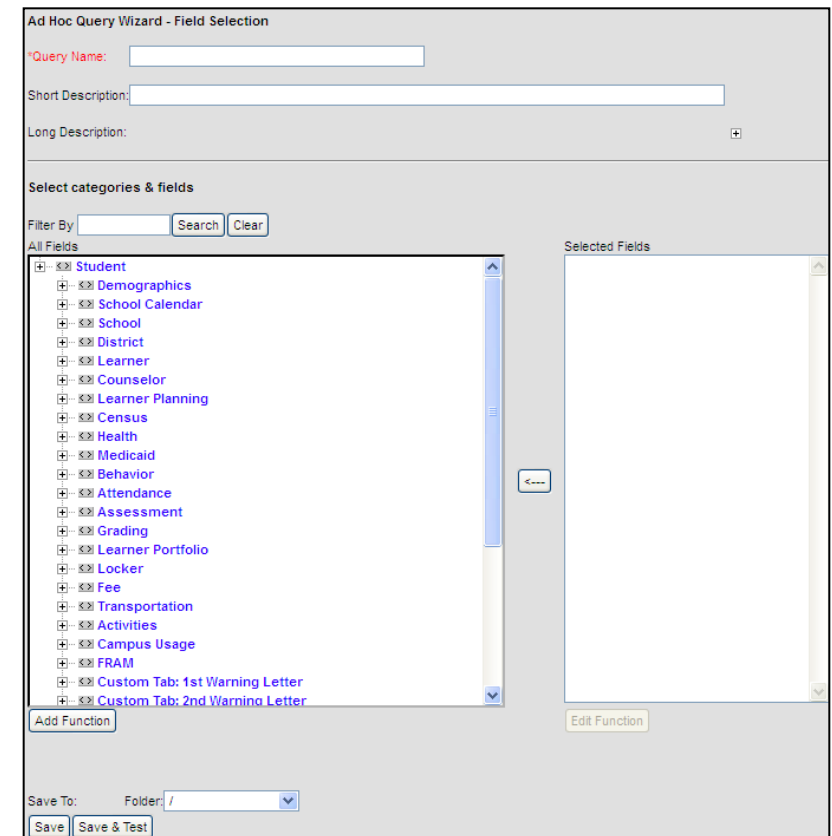
The 'Ad-Hoc Selection Editor' window has a title bar 'Ad-Hoc Selection Editor'. It contains several fields: '*Selection Name:' (text box), 'Short Description:' (text box), 'Long Description:' (text box with a '+' icon), 'People Search' section with 'Name' (text box containing 'a') and 'Filter' (dropdown menu with 'Select a Filter'), 'Include' section with three checked checkboxes: 'Students', 'Staff', and 'Other People', and a 'Search' button. Below these is a 'Selected People' section with a 'Remove All' button and a list of three people: 'Adams, Darrell A (Other)', 'Adams, Frank (Other)', and 'Adams, System (Other)'. Each name has a blue 'Remove' link to its left. At the bottom, there is a 'Save To:' section with 'User Account' selected and a 'Folder:' dropdown menu.

Query Wizard - Creating a New Filter

- Choose Filter Type and Data Type, then click Create. Your school year and calendar selections will affect your result set output.
- Unique name required, description text boxes are optional. This will display on the “saved filters” screen when hovering with the cursor.
- The modules are available based on your initial data set option (student, census, or course.) Each module contains multiple fields to select.
- Filters can *only* pull information saved in the database (for example, you can not create a filter to find a student who has never had a FRAM eligibility, because that studentID does not exist in the FRAM records.)
- Expand the module and click the field name to use it in your filter. To remove a field, highlight it from the “selected” box and click the left arrow button (center.)



The screenshot shows the 'Ad Hoc Filter Designer' window. It has a title bar and a main area with a 'Saved Filter' list on the left containing 'programs extracts', 'student find me some kids!', and 'student regents extract'. On the right, there's a 'Create New' section with 'Filter Type' (Query Wizard selected, Selection Editor, Pass-through SQL Query) and 'Data Type' (Student selected, Census/Staff, Course/Section). A 'Create' button is at the bottom right.



The screenshot shows the 'Ad Hoc Query Wizard - Field Selection' window. It has a title bar and a main area with a 'Query Name' field, a 'Short Description' field, and a 'Long Description' field. Below these is a 'Select categories & fields' section with a 'Filter By' dropdown, a 'Search' button, and a 'Clear' button. The 'All Fields' list on the left includes 'Student', 'Demographics', 'School Calendar', 'School', 'District', 'Learner', 'Counselor', 'Learner Planning', 'Census', 'Health', 'Medicaid', 'Behavior', 'Attendance', 'Assessment', 'Grading', 'Learner Portfolio', 'Locker', 'Fee', 'Transportation', 'Activities', 'Campus Usage', 'FRAM', 'Custom Tab: 1st Warning Letter', and 'Custom Tab: 2nd Warning Letter'. The 'Selected Fields' list on the right is empty. At the bottom, there are 'Add Function' and 'Edit Function' buttons, and a 'Save To:' section with a 'Folder' dropdown and 'Save' and 'Save & Test' buttons.

Query Wizard

- Query Wizard Filters are dynamic and will pull current information from the database.
 - Districts using Tableau third-party software will have an option whether to use Data Warehouse data, or live.
- Fields are organized in a format similar to the tab set modules from the index.
- The “Filter By” search box will narrow the field list to any modules containing your entry. The Clear button will return to the full display of field options.
- Once fields are selected, the header bar has blue links to navigate throughout the Query Wizard (this helps avoid scrolling L/R/Up/Down for users who have zoomed in the view on their browser.)

Ad Hoc Query Wizard - Field Selection

*Query Name:

Short Description:

Long Description:

Select categories & fields

Filter By

All Fields

- Student
 - Demographics
 - School Calendar
 - School
 - District
 - Learner
- Active Enrollment
- Core elements
 - enrollmentID
 - personID
 - calendarID

Selected Fields

- activeEnrollment.startDate

Data source:

- Data Warehouse 09/14/2014 22:03:00 -0400
- Live

Ad Hoc Query Wizard - Field Selection

Select fields to use for creating a filter for which logic and output formatting may be applied. Click from the Selected Fields window, select the field(s) and click the back arrow <--. The output will must be selected to continue.

[Field Selection](#) > [Filter Parameters](#) > [Output Formatting](#) > [Grouping and Aggregation](#)

Query Wizard (cont'd)

Ad Hoc Query Wizard - Field Selection

*Query Name:

Short Description:

Long Description:

Select categories & fields

Filter By

All Fields

- + Student (Data Set Name)
 - + Demographics (Table Module Names)
 - + School Calendar (Table Module Names)
 - + School (Table Module Names)
 - + District (Table Module Names)
 - Learner (Table Module Names)
 - Active Enrollment (Sub-Module Table Names)
 - Core elements (Sub-Module Table Names)
 - enrollmentID (Field Names)
 - personID (Field Names)
 - calendarID (Field Names)
 - structureID (Field Names)
 - grade (Field Names)

Left Arrow to "de"select a Field

Selected Fields

activeEnrollment.startDate

Module "dot" Field Name

Hover over
for Max.
character
length
allowances

Back and Next
buttons are on
the bottom right
to navigate
through the
steps of the
Wizard

OR use the
blue navigation
links to move
through the
steps

Ad Hoc Query Wizard - Field Selection

Select fields to use for creating a filter for which logic and output formatting may be applied from the Selected Fields window, select the field(s) and click the back arrow <--. The one must be selected to continue.

[Field Selection](#) > [Filter Parameters](#) > [Output Formatting](#) > [Grouping and Aggregation](#)

Query Wizard (Cont'd.)

- Parameters uniquely filter each field while maintaining the filter structure.
 - see additional document for operator definitions and use
 - users can employ the following wildcard for searches:
 - % percent sign can be used for an unknown string of values
 - SEARCH > *module.lastName* = "R%z" will return Rodriguez, Ramirez, Ruiz, Rodenzo, Randazzo, etc.
 - _ underscore can be used for a single unknown value
 - SEARCH > *module.lastName* = "Rodri_uez" will return Rodriguez, Rodriquez
 - other wildcards exist, but aren't commonly used
 - ['x'y'] items encased in brackets will return only those values
 - [^z'] bracketed and caret values will not return

Query Wizard (Cont'd.)

- Filter Operators allow a user to define specific constraints about how each field is reported within the filter.
- There is also an Add button to re-use operators on a field multiple times (i.e. grading.score <= 64, grading.score <> 100, grading.score LIKE F).
- Enter the definition information in the Value field.

Filter the data

ID	*Field	Operator	Value
✕ 1	student.firstName		
✕ 2	student.lastName		
✕ 3	student.grade		
✕ 4	courseSection.courseName		
✕ 5	courseSection.courseNumber		
✕ 6	courseSection.homeroom		
✕ 7	courseSection.sectionNumber		
✕ 8	sectionSchedule.termStart		
✕ 9	sectionSchedule.periodStart		

Add

Inserting a Function

- You can add a function to perform tasks in a result column
 - Enter a name for the function. This will serve as the field name.
 - Can contain spaces but not 'special characters'.
 - Choose a function.
 - Constant - creates a new column with a fixed value
 - Enter "constant" value into the text field
 - Coalesce - "substitutes" one field for another if the initial field return IS NULL (max 5 fields)
 - Concatenate - merges the values from two fields/columns into one return column (max 5 parameters)
 - Add, Subtract, Multiply, Divide - mathematical functions between at least two numeric fields
 - For all functions containing multiple field components , each must be selected and entered into the Parameters box.
 - Record Count - number of returned records
 - Distinct Count - number of unique (non-repeated) returned records
 - MIN - returns the "lowest" value of this field for all records returned
 - MAX - returns the "highest" value of this field for all records returned
 - SUM - returns the sum of the numeric values contained within this field (numeric fields only) per unique ID*
 - AVG - returns the average of the numeric values contained within this field (numeric fields only) per unique ID*
 - Any function may be edited by highlighting the *function.name* "field"

*If there are repeated records in the return set, ad hoc will sum and average ALL records, not only those that are unique. i.e. extracting credits earned sum along with two guardian contacts will result in double the sum of the credit value (double the rows, double the values)

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 value:

All Fields:

- Student
- Demographics
- School Calendar
- School
- District
- Learner
- Counselor
- Learner Planning
- Census
- Health
- Medicaid
- Behavior
- Attendance
- Assessment
- Grading
- Learner Portfolio
- Locker
- Fee
- Transportation
- Activities
- Campus Usage
- FRAM
- Custom Tab: 1st Warning Letter

Parameters:

Using the Add Button and Deleting Fields

- You may add a field multiple times within the same filter, so multiple definitions may be used against it
 - In the example below, the user can find all third grade-linked courses, but can exclude the “lunch” and “attendance” courses.

*Query Name:

Short Description:

Long Description: +

Filter the data

	ID *Field	Operator	Value
✕	1 student.studentNumber		
✕	2 student.firstName		
✕	3 student.lastName		
✕	4 student.grade		
✕	5 courseSection.courseNumber	LIKE	03
✕	6 courseSection.courseNumber	NOT IN	003LUN, 03 ATT

- You may also delete repeated fields from your results by clicking the “x” next to the field ID. If a non-repeated field is deleted from display, it will still be available in the list from step 1 of the Query Wizard, and you may return it to the result set by choosing it from the list under “Add”.
 - All selected fields “tie in” records, the deletion will not display a different result set until it is removed from the Selected Fields list.

Adding a Logical Expression

- A filter can be tested and re-tested using the Logical Expressions text box
- Fields are referenced by their field IDs, and not the field names
- ()Parentheses must be used for grouping, and only the SQL expressions AND, OR, and NOT may be used in this field
 - AND means all conditions must fit the statement
 - OR means only one condition needs to fit the statement
 - NOT means the condition must not fit the statement

Field IDs to
be used in
statements

Location for
entering
conditions

Filter the data

	ID *Field	Operator	Value
X	1 student.studentNumber		
X	2 student.firstName		
X	3 student.lastName		
X	4 student.grade		
X	5 courseSection.courseNumber	LIKE	03
X	6 courseSection.courseNumber	NOT IN	003LUN, 03 ATT

Add

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))

Adding a Logical Expression

- A sample filter

***Query Name:** Logical Expression - which LEP program area

Short Description: determine if any kids still have LEP in their "program" flags rather than the LEP module

Long Description:

All fields containing an operator must be added into the expression, or their qualifiers will be ignored. In the case below, ID7 student.activeToday will report both true and false.

The AND operator can't be used on the same field twice, because one record can never return two conflicting results. For example, student.lastName = Adams AND student.lastName = Anderson will never be true for one person's identity.

Filter the data

	ID *Field	Operator	Value
✕	1 student.firstName		
✕	2 student.lastName		
✕	3 student.grade		
✕	4 lep.currentProgramStatus	=	LEP
✕	5 spProgram.code	=	0231
✕	6 spProgram.endDate	IS NULL	
✕	7 student.activeToday	= TRUE	

Add

Logical Expression (Optional):

4 OR (5 AND 6)

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))

Query Wizard (Cont'd.)

- Output Formatting allows users to control how each field will be reported and displayed when exported.

Format the output file/report

☒ Output distinct records

Field	OutputSeq	Sort	Direction	Column Header	Alignment	Formatting	Length
student.studentNumber	<input checked="" type="checkbox"/> 1			Student ID	Center	Zero Pad	9
student.firstName	<input checked="" type="checkbox"/> 2						
student.lastName	<input checked="" type="checkbox"/> 3	1	Ascend	Last	Center	Upper Case	
student.activeToday	<input type="checkbox"/>						
contacts.relatedBy	<input type="checkbox"/>						
contacts.secondary	<input type="checkbox"/>						
contacts.mailing	<input type="checkbox"/>						
contacts.guardian	<input type="checkbox"/>						
contacts.portal	<input type="checkbox"/>						
contacts.addressLine1	<input checked="" type="checkbox"/> 5						
contacts.addressLine2	<input checked="" type="checkbox"/> 6						
contacts.privateAddress	<input type="checkbox"/>						
mailingAddress.guardianName	<input checked="" type="checkbox"/> 4						
contacts.personGUID	<input checked="" type="checkbox"/>						

Save To: ☐ User Account

☒ User Groups

xHS Last Year
xHS Next Year
xHS This Year

Save Save & Test

- Output - determines whether or not a column will display with the data results. The filtering criteria is still factored into the ad hoc results.
- Sequence - displays the columns (numerically) left-to-right if you want to change the field order in the results
- Sort - will sort the result data alphanumerically in the numeric order in which you choose (i.e. sort last name **0-##-A-Z**, then first name **0-##-A-Z**. Without sorting, the ID columns are the primary sort - in this filter's case, studentNumber.)
- Direction - is Ascending (low to high) or Descending (high to low **Z-A-##-0**)

Query Wizard (Cont'd.)

- Output Formatting allows users to control how each field will be reported and displayed when exported.

Format the output file/report

☒ Output distinct records

Field	Output	Seq	Sort	Direction	Column Header	Alignment	Formatting	Length
student.studentNumber	<input checked="" type="checkbox"/>	1			Student ID	Center	Zero Pad	9
student.firstName	<input checked="" type="checkbox"/>	2						
student.lastName	<input checked="" type="checkbox"/>	3	1	Ascend	Last	Center	Upper Case	
student.activeToday	<input type="checkbox"/>							
contacts.relatedBy	<input type="checkbox"/>							
contacts.secondary	<input type="checkbox"/>							
contacts.mailing	<input type="checkbox"/>							
contacts.guardian	<input type="checkbox"/>							
contacts.portal	<input type="checkbox"/>							
contacts.addressLine1	<input checked="" type="checkbox"/>	5						
contacts.addressLine2	<input checked="" type="checkbox"/>	6						
contacts.privateAddress	<input type="checkbox"/>							
mailingAddress.guardianName	<input checked="" type="checkbox"/>	4						
contacts.personGUID	<input checked="" type="checkbox"/>							

Save To: ☐ User Account

☒ User Groups

xHS Last Year
 xHS Next Year
 xHS This Year

Save Save & Test

- Column Header - replaces the field name with the text entered.
- Alignment - determines what justification the column header and result data displays (left, right, center)
- Formatting - allows you to change the spacing, padding, and text formatting of the results, and Length applies to Fixed Width export formatting only (isn't honored in HTML, .CSV, etc.)
- If data is exported using the Fixed Width format, fields with the Output checkbox checked should have a Length value entered

Query Wizard (Cont'd.)

- Output Formatting allows users to control how each field will be reported and displayed when exported.

Format the output file/report

☒ Output distinct records

Field	OutputSeq	Sort	Direction	Column Header	Alignment	Formatting	Length
student.studentNumber	<input checked="" type="checkbox"/>	1		Student ID	Center	Zero Pad	9
student.firstName	<input checked="" type="checkbox"/>	2					
student.lastName	<input checked="" type="checkbox"/>	3	1	Ascend	Last	Center	Upper Case
student.activeToday	<input type="checkbox"/>						
contacts.relatedBy	<input type="checkbox"/>						
contacts.secondary	<input type="checkbox"/>						
contacts.mailing	<input type="checkbox"/>						
contacts.guardian	<input type="checkbox"/>						
contacts.portal	<input type="checkbox"/>						
contacts.addressLine1	<input checked="" type="checkbox"/>	5					
contacts.addressLine2	<input checked="" type="checkbox"/>	6					
contacts.privateAddress	<input type="checkbox"/>						
mailingAddress.guardianName	<input checked="" type="checkbox"/>	4					
contacts.personGUID	<input checked="" type="checkbox"/>						

Save To: ☐ User Account

☒ User Groups

xHS Last Year

xHS Next Year

xHS This Year

Save Save & Test

- Output distinct records - will report only those records WITHOUT duplicate field results. For example, a “grayed out” (with Output unchecked) field may be different, while all of the “displayed” fields are identical. This will eliminate the duplicates.
- Users must have pop-ups enabled on the web browser in order to view Test results**
- Filters can't be saved to multiple users or user groups. Each must have a separate stored copy so alterations may be made without affecting another group.

Query Wizard (Cont'd.)

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

Group the data into sections that can have aggregates/sub-totals

Grouping	Group by	Group Order
Tier 1	contacts.personGUID	Ascending
Tier 2		Ascending
Tier 3		Ascending
Tier 4		Ascending
Tier 5		Ascending

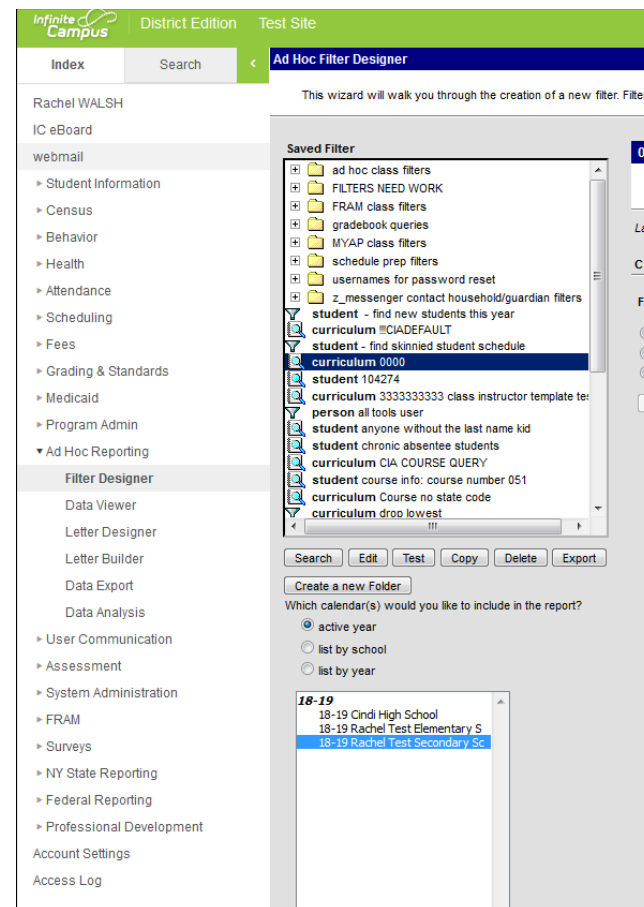
Aggregate/Sub Total by	Aggregate Type
student.studentNumber	Distinct Count

- In this example, each Group [collective students] will be displayed in a separate “block” for each parent (*contacts.personGUID*)
- Since a student may have more than one contact/parent, a “distinct record count” student numbers is added to the Aggregation
- Results have Grouping by GUID/parent and a Record (student) Count per Group, and for the entire report
- Grouping and Aggregation headers are NOT honored in .csv and fixed width export formats**

contacts.contactGUID 912C748E-88CA-4C44-A21D-E13773AAB34C							
Student ID	student.firstName	Last	contacts.firstName	contacts.lastName	contacts.addressLine1	contacts.addressLine2	contacts.contactGUID
349504	Minnie	CLANCY	Daniel	Clancy	52 Miller Rd	Mattituck, NY 11952	912C748E-88CA-4C44-A21D-E13773AAB34C
334330	Scot	CLANCY	Daniel	Clancy	52 Miller Rd	Mattituck, NY 11952	912C748E-88CA-4C44-A21D-E13773AAB34C
contacts.contactGUID 912C748E-88CA-4C44-A21D-E13773AAB34C Distinct Student ID: 2							
contacts.contactGUID 507F070F-8E52-4FA8-A3FA-F86427C3967D							
Student ID	student.firstName	Last	contacts.firstName	contacts.lastName	contacts.addressLine1	contacts.addressLine2	contacts.contactGUID
889692	Khalliyah	ALONI	Neal	Aloni	33 Brook St	Mattituck, NY 11952	507F070F-8E52-4FA8-A3FA-F86427C3967D
contacts.contactGUID 507F070F-8E52-4FA8-A3FA-F86427C3967D Distinct Student ID: 1							
All Records Distinct Student ID: 11							



Re-Using Saved Filters

- When selecting a saved filter to enable “action buttons”, Campus displays a calendar picker below the saved filter window. This defaults to the calendar selected in the header, but will override the calendar header if the selection is changed. Click and drag or CTRL+click to select multiple calendars from the list.



Re-Using Saved Filters

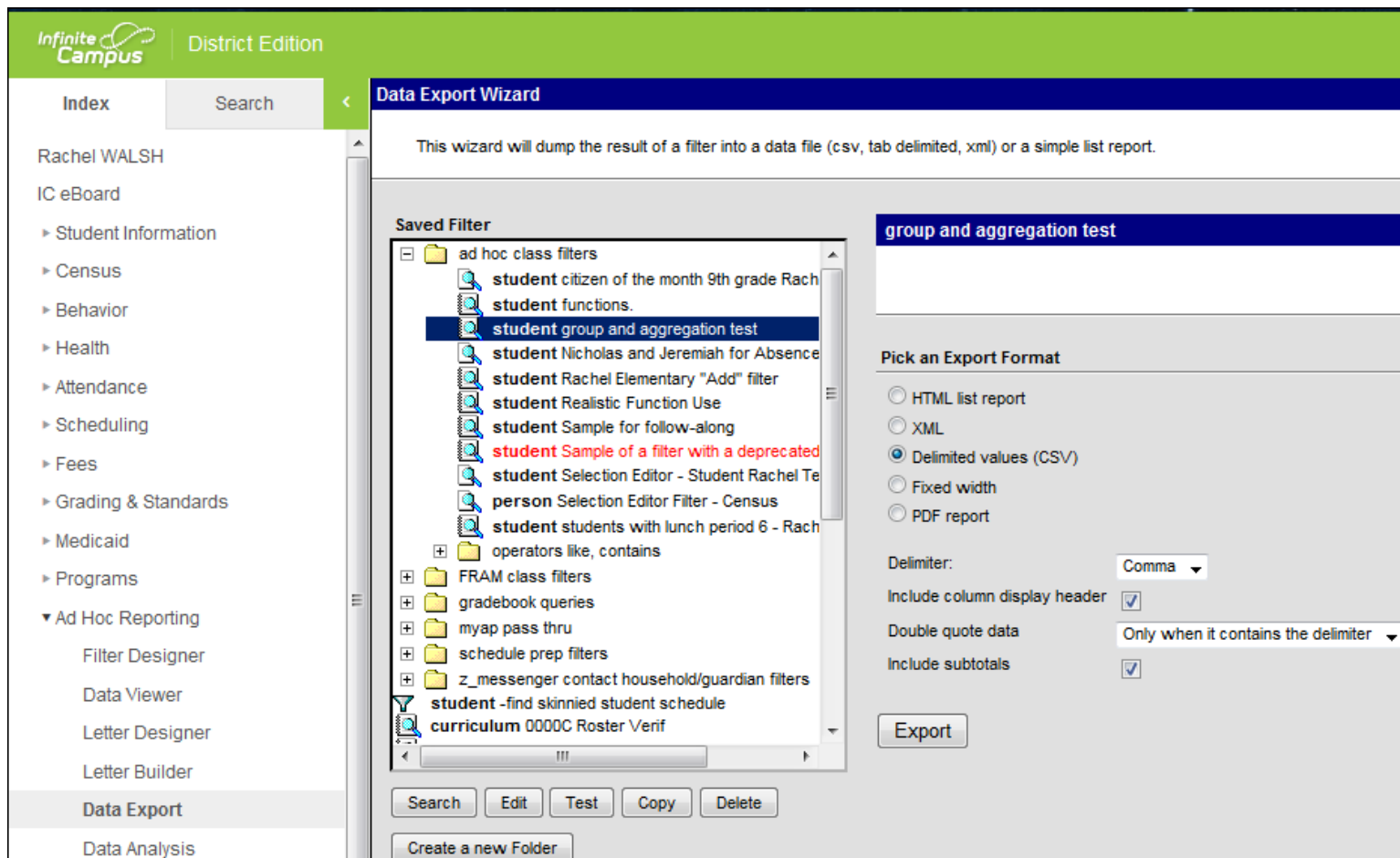
- When testing a filter, Campus will display any *non-formatted* filter in a mobile-friendly view. It uses the same sort, hide, and filter functions as a spreadsheet program, as well as the option to 'group by' when using click-and-drag on the column headers. It also has options to display as an HTML table (traditional popup), to export to Excel, or to export as PDF.

Realistic Function Use Total Records: 54	
Simple HTML table	
 Export to Excel  Export to PDF	
Drag a column header and drop it here to group by that column	
FUNCTION.FUNCTION	STUDENT.LASTNAME
Test Homeroom	Sort Ascending
Test Homeroom	Sort Descending
Test Homeroom	Columns >
Test Homeroom	Filter >
Test Homeroom	Aguilar
Test Homeroom	Bard
Test Homeroom	BATCH ASSIGNMENT
Test Homeroom	Bernt
Test Homeroom	ENROLL CHANGE
Test Homeroom	FALSE
Test Homeroom	FULL SCHED
Test Homeroom	FULL SCHED
Test Homeroom	KID
Test Homeroom	KID
Test Homeroom	KID

Data Export

Ad Hoc Reporting>Data Export

- Allows users to view the results of Ad Hoc filters created via the Filter Designer in multiple report formats and files. The Data Export fields include: HTML list report, XML, Delimited values (CSV), Fixed Width, PDF report.
- Users have the ability to Edit, Copy, and Delete from this tool based on the user rights toolset.



Letter Designer

Ad Hoc Reporting>Letter Designer

- Ability to select either a Blank or Addressed Form Letter
- Letter templates are user-specific and can also be saved to shared ad hoc User Groups.
 - It's helpful to indicate the filter to be used with the template, to avoid printed letters for the wrong student(s).
- Highlight saved letter name to Edit, or click New Format to create a new template.
- Letters can be created in each Census> People> Demographics> Personal Contact Information> Preferred Language option, and will be auto-selected by recipient's [guardian's] language field.
 - English is selected automatically, other languages must be marked active before the letters will populate in an alternate (saved as draft until activated).

The screenshot shows the Infinite Campus web application interface. At the top, there's an orange header with the Infinite Campus logo and the text "District Edition Sandbox Test Site". Below this is a navigation bar with "Year 18-19", "School Rachel Test School", and "Calendar 18-19 Rachel Test School HS". The main navigation menu on the left includes "Index", "Search", and "Ad Hoc Letter Designer" (which is highlighted). Below the navigation menu is a sidebar with a search bar and a list of categories: Rachel WALSH, Student Information, Census, Behavior, Health, Attendance, Scheduling, Fees, Grading & Standards, Medicaid, Program Admin, and Ad Hoc Reporting. The "Ad Hoc Reporting" category is expanded, showing "Filter Designer" and "Data Viewer". The main content area is titled "Ad Hoc Letter Designer" and contains a wizard instruction: "This wizard will walk you through the creation of a new letter format." The wizard has three steps: "Name", "Short Description", and "Long Description". The "Name" step is active, showing a text input field with "blank letter". Below the "Name" step is a "Preferred Language" section with a "Active" checkbox. Under "Preferred Language", there are two options: "en_US: US English" (checked) and "es_MX: Spanish (Mexico)" (checked). To the right of the "Preferred Language" section is a rich text editor with a toolbar containing various formatting options. The editor contains the text "This is a blank letter to show there isn't any auto-inserted data." and two placeholder fields: "student.firstName" and "student.lastName".

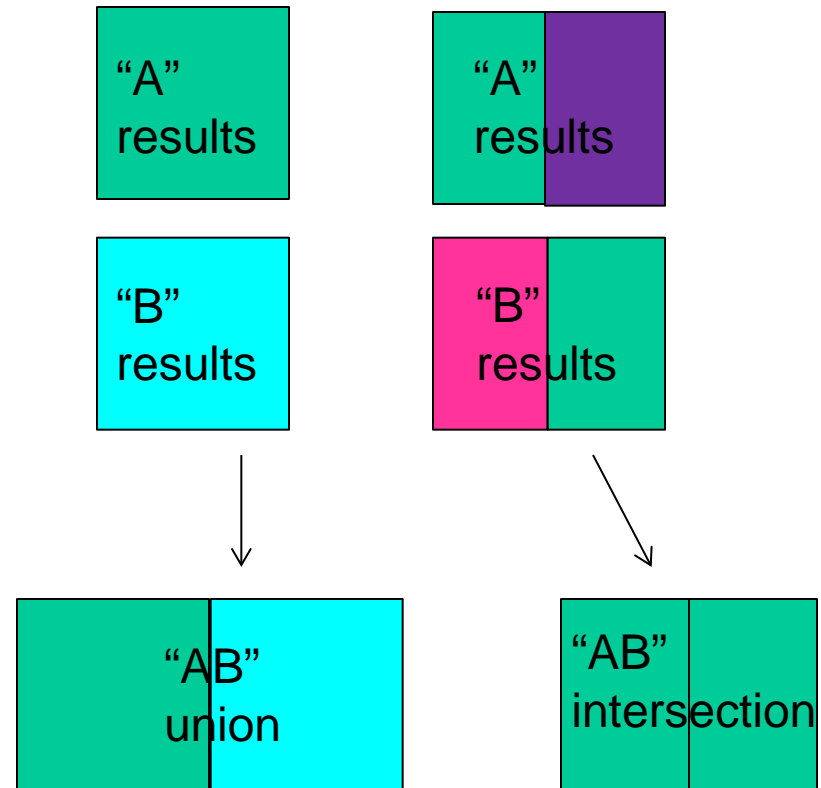
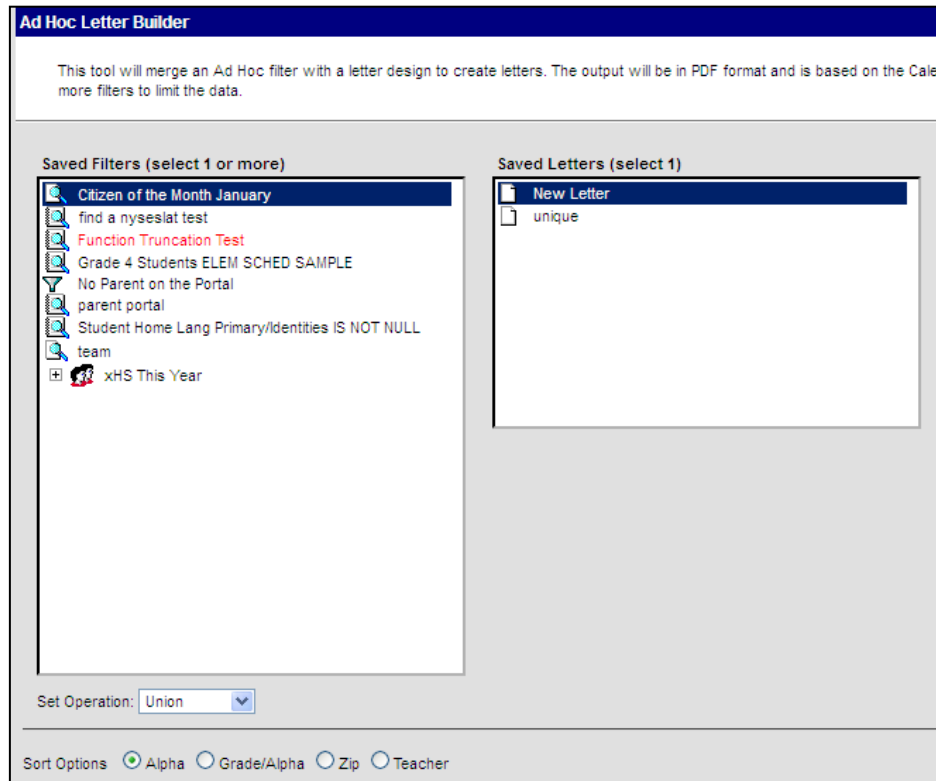
Letter Designer

- Free-text type the letter body
- Click the “Link” icon (Campus ‘barrels’ in the blue dashes) in the HTML editor bar to insert customized school and student/census fields into your letter.
- Click the “Document” icon (Campus ‘paper’ in the red-dashes) to add a student-specific sub report to the letter. Choices are: Schedule, Attendance, Grading, Behavior, GPA/Class Rank, Immunization, and POS Account Balance reports.
- When finished formatting the letter, choose whether to save to your account or share in a User Group, and click Save Format.

The screenshot displays the 'Ad Hoc Letter Designer' application. The main window has a title bar 'Ad Hoc Letter Designer' and a subtitle 'This wizard will walk you through the creation of a new letter format.' Below this, there are input fields for 'Name' (containing 'New Letter'), 'Short Description' (containing 'Citizen of the Month Award'), and 'Long Description'. A 'Format' section includes a warning 'Cutting and pasting from third party products, e.g., Microsoft Word, is not recommended.' and a toolbar with various icons. The main text area contains 'Dear Parent/Guardian of {student.firstName}' where the '{student.firstName}' is highlighted with a blue dashed border. At the bottom, there is an 'Organized To:' dropdown set to 'User Account' and a 'Save Format' button. A 'Campus Field Properties' dialog box is open on the right, showing a tree view of fields under 'Student' and 'Demographics'. The 'Demographics' section is expanded, listing fields like 'personID', 'stateID', 'otherID', 'studentNumber', 'personGUID', 'identityID', 'effectiveDate', 'lastName', 'firstName', 'middleName', 'suffix', 'alias', 'gender', 'birthdate', 'ssn', 'raceEthnicity', 'hispanicEthnicity', 'raceEthnicityFed', and 'raceEthnicityDetermination'. A 'Cancel' button is at the bottom right of the dialog.

Letter Builder

- Allows users to create letters combining Ad Hoc Filters (Filter Designer) with saved Letter Designer templates to create multiple student letters based on filtered student data.
 - More than one saved Ad Hoc filters may be selected. Users select one of two set operations:
 - Union – Combines 2 or more filters by appending one to the other. (Includes all results from Filter A and all results from Filter B)
 - Intersection – Locates only data that is reported in BOTH (ALL) filters. (Includes ONLY results that are repeated on Filter A and Filter B.)
- Different sort options are available for ease of distribution.



Letter Builder

- Letters are created in PDF format, and are generated based on the calendar selection in the header (an ad hoc locating 3rd-grade students will not generate letters when the High School is selected in the header.)
- Letters generated using this tool will be saved in Student Information>General>Ad Hoc Reports and can be regenerated individually from that student's tabset.
 - If the letter contains a Campus *field* that isn't applicable to the student (i.e. "termsAbsences" and the student has zero,) the report will remove the student from the list or print with "No Students Found" in the text body (if there is only one student in the filter). Sub-reports print student name only, without sub-report data.

The screenshot displays the Infinite Campus District Edition interface. At the top, the header shows 'Infinite Campus District Edition' with a green background. Below the header, there are dropdown menus for 'Year' (14-15) and 'School' (Jefferson Middle School). The main content area is divided into a left sidebar and a central panel. The sidebar contains a search bar with 'abb' entered and a 'Go' button. The central panel shows the student profile for 'Abbazia, Tammy' with various tabs for different report types. The 'AdHoc Letters' tab is selected, showing a list of letter types including 'ADDRESSED letter'. A preview of the generated letter is shown on the right, displaying school information, student details, and a welcome message for orientation night.

Search Results: 4

- 08 Abbazia, Tammy #108559 [05/19/2015]
- 06 Abbazia, William B #108556 [12/12/2014]
- 07 Abbott, Krish #888888 [06/29/2002]
- 06 Abbruzzese, Ahmed W #106845 [01/12/2015]

AdHoc Letters

- ☐ 56
- ☐ Absence letter
- ☒ ADDRESSED letter
- ☐ Citizen of month lunch invitation
- ☐ NON-ADDRESSED letter

Letter Preview:

Jefferson Middle School
440 Jefferson Avenue
Islip Terrace, NY 11752
(631)555-1234

Report generated:
04/13/2015

Student #108559
Grade: 08
Birthdate: 05/19/2001

Parent/Guardian of: Abbazia, Tammy
7 Ln
East Islip, NY 11730

Good morning,

We at Jefferson Middle School would like to welcome both parents and students to orientation night on Friday. There will be a short address at 6:30 p.m. by the principal, Jeffrey Thompson, and afterward you will have the opportunity to tour the building to locate your child's classroom.

Letters in Student Information

- Ad hoc letters are available in Student Information> AdHoc Letters tab, based on user rights.
 - Letters must be created by the user or accessible through a shared group.
 - Shared letter titles should contain a description (i.e. the “Freshman Seminar” letter should not be printed for tenth-grade students).
 - If a letter contains a data field not applicable to the student, the letter will generate “No Students Found”.

Yangala, Opal L
Grade: 09 #100011746 DOB: 05/04/2004 Gender: F

Summary Profile Enrollments Schedule Attendance Flags Grades Transcript Credit Summary

Athletics **AdHoc Letters** Waiver Athletics -Eligibility Records Transfer AUP Student Activities Miscellaneous

Print

AdHoc Letters

AdHoc Letter

- [-] .rachel ad hoc
- [+] absence letter sample
- [+] Freshman Seminar Invitation

report-32.pdf - Adobe Acrobat Pro

File Edit View Window Help

Create [Icons]

1 / 1 75%

Rachel Test School
123 Road Street
Westhampton Beach, NY 11978
(631)244-4214

Parent/Guardian of: Yangala, Opal L
62 Drive
Sayville, NY 11782

Dear Parent,
Mr. Prince E. Pal would like to invite your stu
Thursday, January 24. Please note lunch wil
Although this is not a mandatory scheduling
will assist Opal in making practical high scho

CENSUS MISSING, Student
Grade: 09 #100013419 Gender: M

Summary Profile Enrollments Schedule Attendance Flags

Athletics **AdHoc Letters** Waiver Athletics -Eligibility Records Transfer

Print

AdHoc Letters

AdHoc Letter

- [-] .rachel ad hoc
- [+] absence letter sample
- [+] Freshman Seminar Invitation

report-34.pdf - Adobe Acrobat Pro

File Edit View Window Help

Create [Icons]

1 / 1 122%

No students found.

Advanced Search

- Advanced Search allows a user to populate the index with the filter's unique IDs, based on the source of the filter.

The image displays three overlapping screenshots of the 'Campus Search' application interface, demonstrating different search filters. Each screenshot has a yellow 'Advanced Search' label pointing to the search button.

Screenshot 1 (Top Left): Student Search

- Index:** Student
- Search:** Search Student, Go
- Search Results:** 2
- Results:** 09 ABSENCE, Test #100013418 [04/04], 12 Zevon, Alfred R #100011768 [05/06]
- Search Fields:** Last Name, First Name, Student Number, SSN, Grade
- Saved Filter:** ad hoc class, stunum, .rachel ad hoc, students with medication

Screenshot 2 (Middle): All People Search

- Index:** All People
- Search:** Search All People, Go
- Search Results:** 42
- Navigation:** Now viewing page 1 of 3 (1, 2, 3)
- Results:** ABSENCE, Parent, ABSENCE, Test #100013418 [04/04], Counselor, James Helkin, Micki, Yahil, Nathaniel A #100011742, Volkmann, Jessica S #100011742
- Search Fields:** Last Name, First Name, Student Number, SSN, Birth Date
- Saved Filter:** ad hoc class, my peeps with useraccounts

Screenshot 3 (Bottom Right): Course/Section Search

- Index:** Course/Section
- Search:** Search Course/Section, Go
- Search Results:** 6 Courses
- Results:** 9359 INTEGRATED MATHEMATICS, 9366 ALGEBRA I R, 9372 GEOMETRY R, 9375 GEOMETRY H, 9378 ALGEBRA II R, 9383 MATHEMATICS 9
- Search Fields:** Course #, Course Name, Section #, Teacher Display Name, Room #, Term, Period, Department
- Saved Filter:** ad hoc class, courses taught by Rachel Teacher

Share a Filter in the Index

- Embed a frequently - used filter in the Index through Sys Ad> Custom> Outline Links tool.
- Create the filter.
- Save and Test.
- Select all and copy the entire URL from the result window's browser bar.

The screenshot shows the 'Ad Hoc Filter Designer' interface. On the left, a sidebar lists various filters, with 'Filter Designer' highlighted and marked with a red '1'. The main area displays a 'Saved Filter' list with 'student second share' selected and marked with a red '2'. Below this, the 'Filter Type' section shows 'Query Wizard' selected. To the right, a 'second share' window displays the results of the filter, showing a table of student records. The table has columns for 'STUDENT.STUDENTNUMBER', 'STUDENT.FIRSTNAME', and 'ABSENCE'. The results show six rows of data, all with 'Test' as the first name and 'ABSENCE' as the status. A red '3' is placed next to the table. A context menu is open over the table, showing options like 'Undo', 'Cut', 'Copy', 'Paste', 'Paste & Go', 'Delete', and 'Select All'.

Index Search < Ad Hoc Filter Designer

Search Campus Tools

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

Rachel WALSH

Medications Ad Hoc filter

second share

Student Information

Census

Behavior

Health

Attendance

Scheduling

Fees

Grading & Standards

Medicaid

Program Admin

Ad Hoc Reporting

Filter Designer 1

Data Viewer

Letter Designer

Saved Filter

- ad hoc class
- person my peeps with useraccounts
- student stunum
- student second share
- student students with medication

second share

Last Updated 12/11/2018

Last Run 12/11/2018

Last Run By NO RIGHTS, USER

Create New

Filter Type

- Query Wizard
- Selection Editor
- Pass-through SQL Query

Create

Search Edit Test Copy Delete Export

second share Total Records: 225

Simple HTML table

Export to Excel Export to PDF

Drag a column header and drop it here to group by that column

STUDENT.STUDENTNUMBER	STUDENT.FIRSTNAME	ABSENCE
100013418	Test	ABSENCE
100013418	Test	ABSENCE
100013418	Test	ABSENCE
100013418	Test	ABSENCE
100013418	Test	ABSENCE
100013418	Test	ABSENCE

Undo

Cut

Copy

Paste

Paste & Go

Delete

Select All

Share a Filter in the Index

- Index> Sys Ad> Custom> Outline Links> New Tool.
- Paste the URL in the text field.
- Give the tool a unique name.
- Give the tool a unique code value (to display on hover-over).
- Select a Parent Tool from the tool tree.
 - Make sure it is a folder, and not an existing outline link. Otherwise, there's a warning message:
Warning! The selected Parent Tool is not a folder. Placing an outline link under this tool will cause the selected Parent Tool to behave as a folder in the outline.
- When completed, Save.

The screenshot displays the 'Outline Links' application window. At the top, there are three buttons: '+ New Tool', 'Save', and 'Delete'. Below these is a list of 'Custom Campus Links' on the left and a 'Campus Tool' configuration form on the right.

Custom Campus Links List:

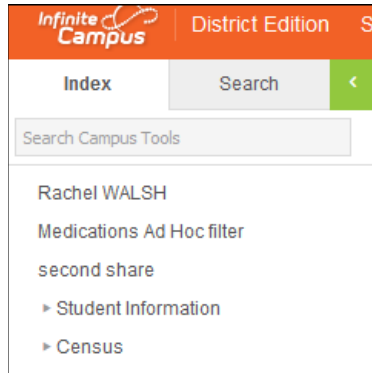
- Census
- Census Mailing Addresses (Extract)
- Course Request Batch
- Course Request Units
- Custom Transcript
- Dictionary Entries (Extract)
- District Mailing Addresses (Extract)
- Medications Ad Hoc filter
- Portal Accounts
- Race Ethnicity Verification
- Race Ethnicity Verification Mailing Addresses (Ex)
- Reports
- second share
- Student Birthdays
- Student Course Absences
- Student Course Absences Mailing Addresses (Ex)
- Student Demographics

Campus Tool Form Fields:

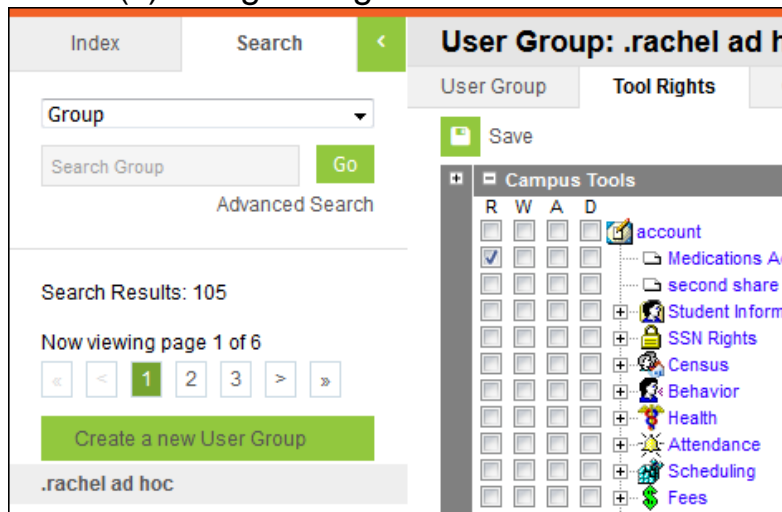
- *Name:** Text input field.
- *Parent Tool:** Dropdown menu.
- *Code:** Text input field.
- Seq:** Text input field.
- URL:** Text input field.
- Note:** External links should begin with the protocol (Ex: http://www)
- Target:** Dropdown menu with 'New Window' selected.
- Pass User Session:** Dropdown menu with 'None' selected.

Share a Filter in the Index

- Log off, and log back in to refresh the index outline.
- Test the filter/report for yourself.



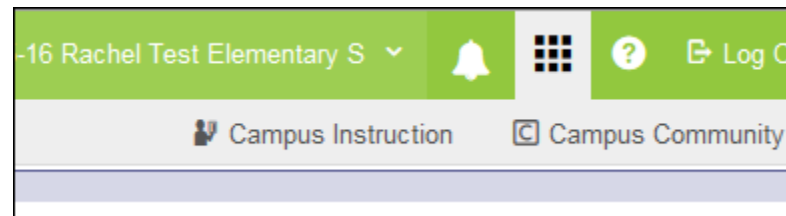
- Once you've confirmed it's functioning, go to the user group (or create new) to add Read rights to this element in the tool tree.
- Navigate to its Tool Rights tab.
- Click the Read box for the element.
- Ask user(s) to log off/log in to confirm use.

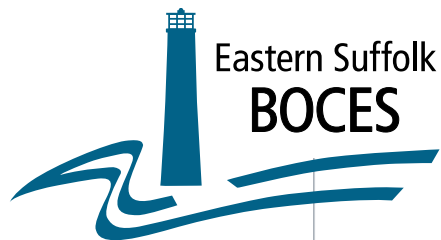


- **Questions?**

Need more help?

Campus Community is a great resource! Click the Campus Community link in your Campus header, and search the Knowledge Base.





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