



MT 2050 Ad Hoc Reporting

August 2009

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AD HOC REPORTING



OVERVIEW

The Ad hoc Reporting module allows a user to create reports and run queries for various types of data in Campus. Ad hoc queries may be used to find data relating to students, staff, all people and courses. These queries may be exported from Campus or used to filter canned reports throughout the product.

In addition, a tool is available in the Ad hoc module to create form letters and complete a mail merge using fields from the Campus database.

OBJECTIVES

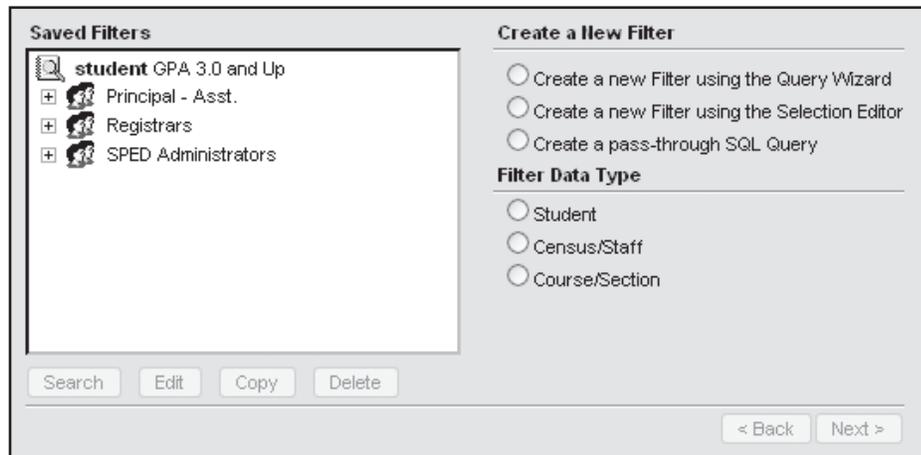
At the end of this lesson, learners will be able to:

- Create an Ad hoc filter using the Query Wizard.
- Create and save an Ad hoc Selection Editor list.
- Utilize an Ad hoc filter elsewhere in the product.
- Create a form letter using the Ad hoc Report Designer.
- Complete a mail merge using Ad hoc Report Builder.
- Export an Ad hoc filter as a CSV file.

Ad hoc **QUERY WIZARD** allows a user to generate dynamic custom searches on any data type.

SELECTION EDITOR is a static list of user-selected students. The list is static and changes must be made manually.

A **PASS-THROUGH SQL** filter can be created on any data type. To use this query you need to reference the schema and understand SQL, the database language used by Campus.



Navigating to the Filter Designer

1. From the Index, expand the Ad Hoc Reporting folder by clicking the plus (+) sign next to the folder or by clicking on the name of the folder.
2. Select the Filter Designer option from within that folder.
3. Existing Ad hoc filters will list in the Saved Filters window. The first filters on the list will be the user's personal Ad hoc Filters. The bottom of this window will have shared filters-- Ad hoc queries that have been created and saved to a particular user group.
4. A user may copy a filter as the starting point of a new query, or to modify that existing query. To copy a filter, select the filter in the list and click Copy.

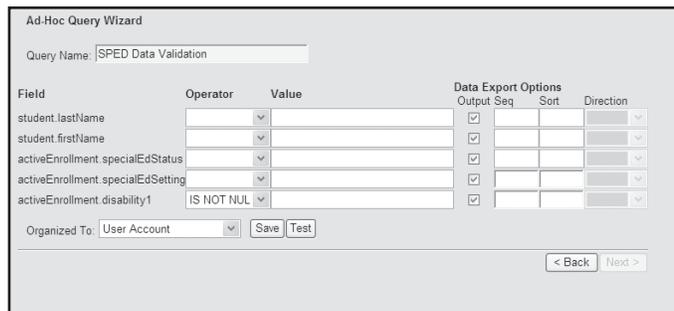
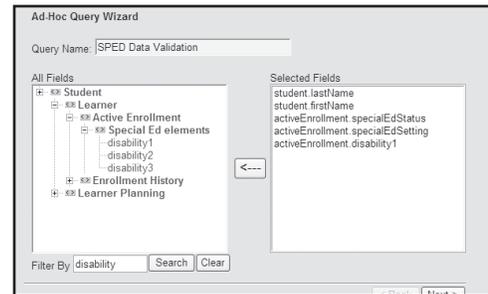
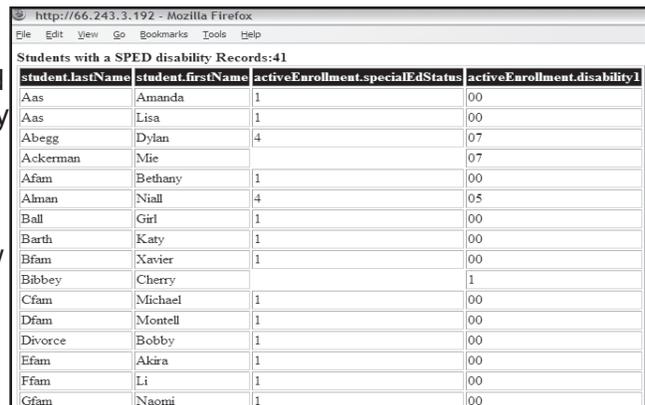


Queries for students and course/section data will pull from the school and calendar selected on the Campus toolbar.

Census/Staff data will pull from the entire Campus database. Queries should be created in such a way to avoid large results. Large queries being ran may cause performance issues district wide.

Using the Query Wizard

- From the main Filter Designer screen, select the first radio button option, Create a New Filter Using the Query Wizard.
- Select a Filter Data Type - Student, Census/Staff or Course/Section. Note: Users may search for field names when defining filters.
- Click the Next button. The screen will display a list of items to select in order to create the filter.
- Enter a Query Name for this filter. The Query Name should be task descriptive.
- In the All Fields table, expand the headers to select the fields to be included in the filter by clicking the field. This will move the field to the Selected Fields list.
- Users may determine the sequence in which the fields will appear in the output. They may also determine the sort order of data: ascending or descending.
- When finished selecting the fields, click the Next button. The screen will list a summary of the chosen fields, with the ability to set a filtering condition on a certain field with a particular operator and criteria.
- To test the query, click Test. The query will run and results will display in a new window.
- Click the Save button when finished. The new filter will be listed in the Saved Filters list on the main page of the Filter Designer.

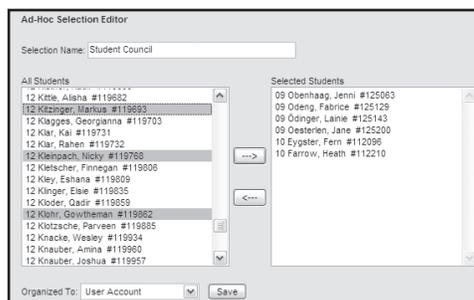



student.lastName	student.firstName	activeEnrollment.specialEdStatus	activeEnrollment.disability1
Aas	Amanda	1	00
Aas	Lisa	1	00
Abegg	Dylan	4	07
Ackerman	Mie		07
Afam	Bethany	1	00
Alman	Niall	4	05
Ball	Girl	1	00
Barth	Katy	1	00
Bfam	Xavier	1	00
Bibbey	Cherry		1
Cfam	Michael	1	00
Dfam	Montell	1	00
Divorce	Bobby	1	00
Efam	Akira	1	00
Ffam	Li	1	00
Gfam	Naomi	1	00

Operator	Function	Example
Equals (=)	An exact match of the user specified value	<i>Student.Grade=12 will return all seniors</i>
Does Not Equal (<>)	Will return all results that do not equal the user-specified value	<i>Student.Gender<>M will return all females or student's whose gender field is null.</i>
IN	Includes	<i>Student.Grade IN 9,10 will return all 9th and 10th grade students</i>
NOT IN	Does not include	
LIKE	Searches for the text string in the field	<i>A course with name LIKE hist will return all "history" classes</i>
SOUNDS LIKE	Phoentic search that searches for text that have similar sound pattern	<i>Last name SOUNDS LIKE "Ball" will return "Bell" and "Boll"</i>
> and >=	Greater than (or equal to)	<i>Students 16 and older could be found with Student.Age >= 16.</i>
< and <=	Less than (or equal to)	<i>Students with last names A through Lon could be found with student.lastname<Lon</i>
IS NULL	Searches for empty fields.	<i>StateID IS NULL will find all students without a stateID</i>
IS NOT NULL	Returns all records that have data in the field.	<i>student.SSN IS NOT NULL will return all students who have a Social Security Number entered in Campus.</i>

Using the Selection Editor

- From the main Filter Designer screen, select the second radio button option, Create a New Filter Using the Selection Editor.
- Select Student as the data type.
- Click the Next button. The screen will display a list of students to select in order to create the filter.
- Enter a name of the Selection Wizard. This name will appear in the Saved Reports lists.
- Select the students from the All Students list on the left by highlighting the name and clicking the right-pointing arrow key. To remove a student from the selected students list, click the left-pointing arrow key.
- Click the Save button when finished. The new filter will be listed in the Saved Filters list on the main page of the Filter Designer feature.



Using the Pass-Through Query

This option requires a basic knowledge of the Campus database schema and SQL terminology.

1. From the main Filter Designer screen, select the third radio button option, Create a pass-through SQL Query.
2. Select a Filter Data Type.
3. Click the Next button.
4. Enter a name for the query in the Filter Name field.
5. In the text fields on the left-hand side of the screen, enter any join statements needed for the query. The beginning part of the query is already written (Select DISTINCT...) for the user.
6. In the second text field, enter conditions to filter the query. For example, if a query is desired that will list all students with the first name of Ashley, the text in this field would be 'and student.first-Name = 'Ashley'.
7. Click the Test Query button to verify that the data returned is the data needed.
8. Click the Save button when finished.
9. The new filter will be listed in the Saved Filters list on the main page of the Filter Designer feature. Once this filter is saved, it can be used to generate custom reports.

Copying Filters

To copy an existing filter that is available in the shared users folders -- or one of your own -- the Filter Designer query wizard aids in the control of output data in the following ways:

- Users may copy, modify and save existing filters for future report needs.
- Users may search for field names when defining filters.
- All elements are flagged for output in the report by default. Users can deselect an element that was used for the data filter purpose.
- Users may determine the sequence in which the fields will appear in the output.
- Users may determine the sort order of data; ascending or descending.

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Report Designer

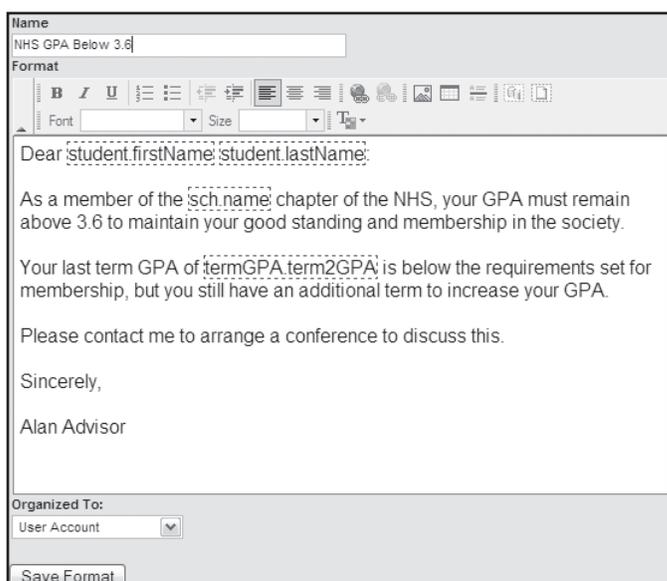
Report Designer is used to create custom letters that will pull data entered into Campus using a WYSIWYG editor. Used in conjunction with a custom filter, it allows you to build a custom report that will import specified data elements for all individuals who meet the filter criteria.

Navigating to Report Designer

From the Index, expand the Ad Hoc Reporting folder by clicking the plus (+) sign next to the folder or by clicking on the name of the folder. Select the Report Designer option from within that folder.

Creating a New Report

1. From the main Report Designer view, select the header format from Blank Form Letter or Addressed Form Letter.
2. Click the New Format button in the lower right-hand corner.
3. On the Ad Hoc Report Format Editor, enter a Format Name for the new report. This name will be displayed in the Saved Reports box.
4. Select the Font, Size and Font Color.
5. Type the layout of the letter in the white text field.
6. To insert a field from the Campus database (such as student name, or a gender-specific pronoun), click the  button. To add a pre-created sub-report (such as an attendance or grades summary) click the  icon. A new window will open where you may select the desired items. These are the last two icons in the first row of the WYSIWYG editor.
7. Select which users should be seeing this report in the Organize To dropdown list – to the user account currently building the report, any person with rights to the selected calendar or teachers.
8. Click the Save button when finished. The new report is listed in the Saved Reports box. Users will need to re-select the Report Designer tool in the outline.
9. Once the reports have been saved, users can use the Report Builder tool to generate the printed version of the report.



The **DATA EXPORT** tool is used to export the filters that were created in the Filter Designer in different formats, depending on what needs to be done with them.

Report Builder

The **REPORT BUILDER** is used to complete a mail merge to send a form letter created in Report Designer to students on one or more Ad hoc filters.

The **UNION** operation combines two queries by performing the equivalent of appending one query onto the other.

An **INTERSECTION** operation is used to generate a report to students who make up the "overlap" of multiple Ad hoc filters.

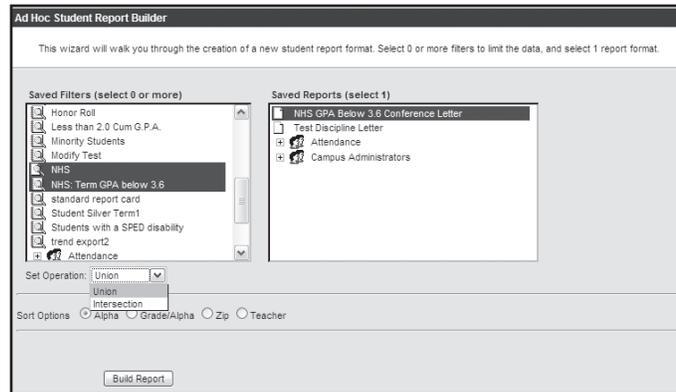
For example, a user has a report (form letter) and two Ad hoc Filters-- the football team and the Honor Society. If union is the operation chosen, the two filters will merge-- students who are in football OR Honor Society will receive the letter. If intersection is chosen, then those students who are in football AND Honor Society will receive a letter.

Saved Filters and Saved Reports are joined together in two ways using Set Operations. A variety of sort options are available for easy distribution and mailing.

From the Index, expand the Ad Hoc Reporting folder by clicking the plus (+) sign next to the folder or by clicking on the name of the folder. Select the Report Builder option from within that folder.

Generating a Report in the Report Builder

1. Select the Filter from the list of saved filters in the left-hand window. At least one filter needs to be selected.
2. Select the Report from the Saved Reports window on the right-hand side of the screen.
3. Select the Set Operation from the dropdown list – union or intersection.
4. Select the appropriate Sort Options – alphabetical, by Grade/Alpha or by Teacher.
5. Click the Build Report button. The report will display in PDF (Adobe) format, listing the students in the filter who were chosen and the report that was built.

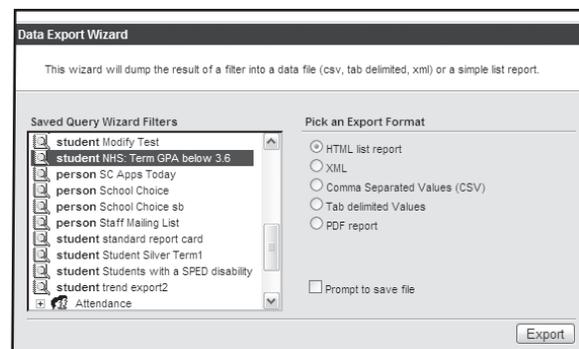


Data Export

From the Index, expand the Ad Hoc Reporting folder by clicking the plus (+) sign next to the folder or by clicking on the name of the folder. Select the Data Export option from within that folder.

Export a Filter in the Data Export

1. Select the Filter from the list of saved filters in the left-hand window. At least one filter needs to be selected.
2. Select the Export Format in which to display the filter.
 - HTML list report – opens report in new Web window
 - XML - shows HTML coding values
 - Comma Separate Values (CSV) - Excel spreadsheet
 - Tab delimited Values - Excel spreadsheet



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- PDF Report
3. Check the box to have the system prompt the user to save the file.
 4. Click the Export button. The report will display in the format chosen.

Using Ad hoc Filters in Reports

Many canned reports in the Campus application may be run for a particular Ad hoc filter. As an example, mailing labels may be run for an Ad hoc filter using Census > Reports > Mailing Labels.

1. From the Index, expand the Census folder by clicking the plus (+) sign next to the folder or by clicking on the name of the folder.
2. From the Index, expand the Reports folder by clicking the plus (+) sign next to the folder or by clicking on the name of the folder.
3. Select the Mailing Labels option from within that folder.
4. Select your filter.
5. Click Generate Report to see a preview of your labels.

Using Ad hoc Filters in Searches

Ad hoc filters can be used as part of a search on the search tab. Student Ad hoc filters may be found in the student search, Census searches may be utilized when searching for a person, and course/section searches may be used when searching for a course or section.

1. Select the Search tab.
2. Choose the type of data to search for.
3. Select Advanced Search from the Search.
4. Select your filter from the list of Saved Filters and click Search.
5. Display results will appear on the left side of the Campus session.

