ACHIEVEMENT IN MONTANA

Quick Reference Guide

AD HOC REPORTING

AD HOC REPORTING – FILTER DESIGNER

STUDENT INFORMATION

From the **Index**, expand the **Ad Hoc Reporting** outline by clicking on the plus (+) sign.

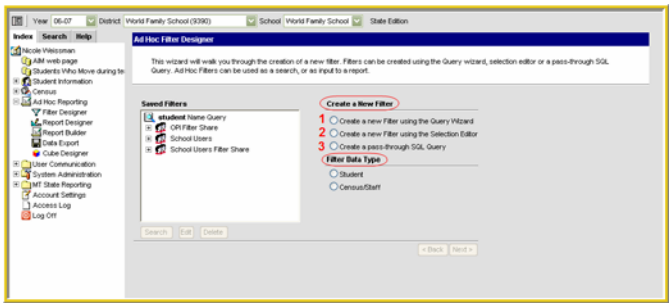
Select the ***Filter Designer*** option.

To create a new filter, choose a filter from **Create a New Filter**.

There are three types of filters:

1. **Query Wizard** filter
2. **Selection Editor**
3. **Pass-Through Query**

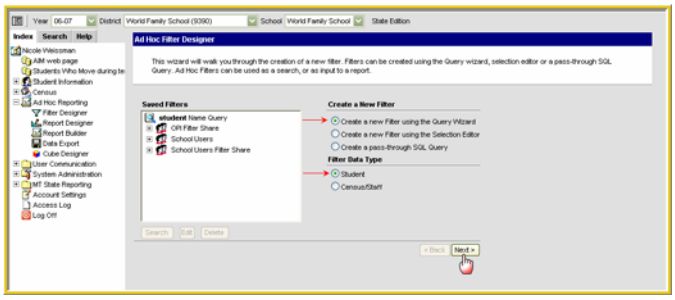
Select the type of data to be filtered.



QUERY WIZARD FILTER

Select *Query Wizard* from **Create a New Filter** and *Student* from **Filter Data Type**.

Click **Next**.



Linda McCulloch, Superintendent
Montana Office of Public Instruction
PO Box 202501
Helena, Montana 59620-2501
www.opi.mt.gov

AD HOC REPORTING – FILTER DESIGNER

Expand the various Infinite Campus outlines by clicking on the plus (+) signs.

Select the individual data elements by double clicking on the element name.

The elements selected appear on the right.

Click **Next**.

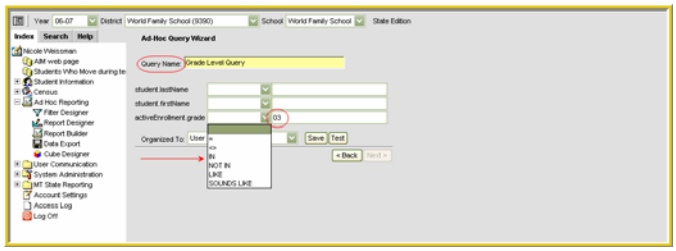
NOTE: The order of the elements cannot be re-arranged once they are selected.

Enter a name for the query.

Filter Options can help narrow the focus of a query.

Select the **Filter Option** and type in the criteria for the filter.

(See ***Filter Options*** at the end of this guide)

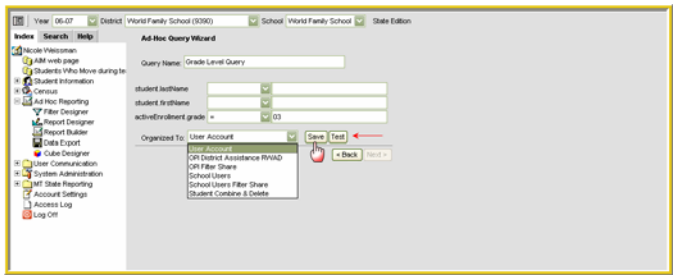


School district generated queries should only be saved to their **User Account.**

Select **Test** to ensure that the query is properly constructed. The query will open in HTML format in a separate window.

Click **Save** to save the query to the **Saved Filters**.

NOTE: OPI generated queries, under **School Users**, should not be modified in any way by school district users (see ***Using Ad Hoc Filters with Advanced Search*** below).



Linda McCulloch, Superintendent
Montana Office of Public Instruction
PO Box 202501
Helena, Montana 59620-2501
www.opi.mt.gov

AD HOC REPORTING

USING AD HOC FILTERS WITH ADVANCED SEARCH

The **Ad Hoc** filters can be used in conjunction with the ***Advanced Search*** tool to generate student reports.

Choose the year from the **Selection Toolbar**.

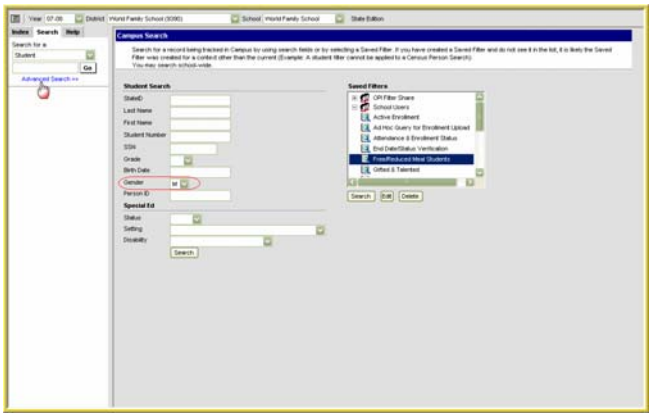
From the **Index**, expand the **Student Information** outline by clicking on the plus (+) sign.

Select ***General*** (the search screen should appear automatically, or click on the **Search** tab.

Click on ***Advanced Search***.

Select a filter from the **Saved Filters** list.

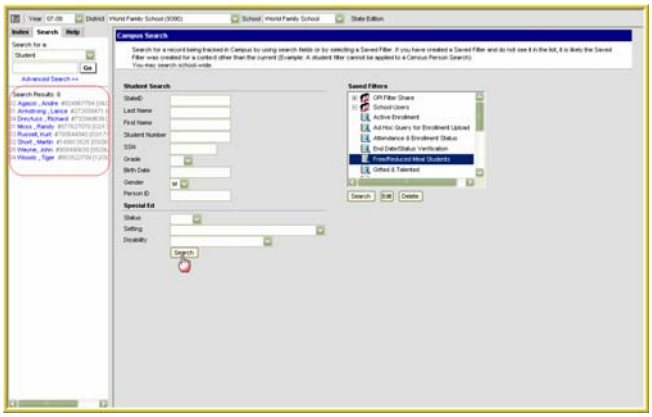
Choose a filter from the **Student Search**.



In this example, we are searching for all *Free/Reduced Meal Students* who are *male*.

Click the ***Search*** button under the **Student Search** filters (clicking the ***Search*** button under **Saved Filters** returns **all** *Free/Reduced Meal Students*).

A list of the *Free/Reduced Meal Students* who are *male* appears on the left.



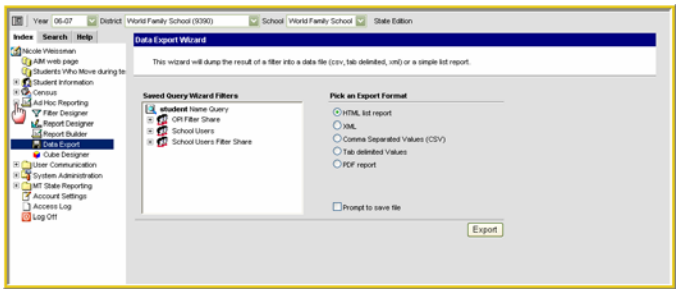
Linda McCulloch, Superintendent
Montana Office of Public Instruction
PO Box 202501
Helena, Montana 59620-2501
www.opi.mt.gov

AD HOC REPORTING

AD HOC REPORTING – DATA EXPORT

From the **Index**, expand the **Ad Hoc Reporting** outline by clicking on the plus (+) sign.

Select the ***Data Export*** option.

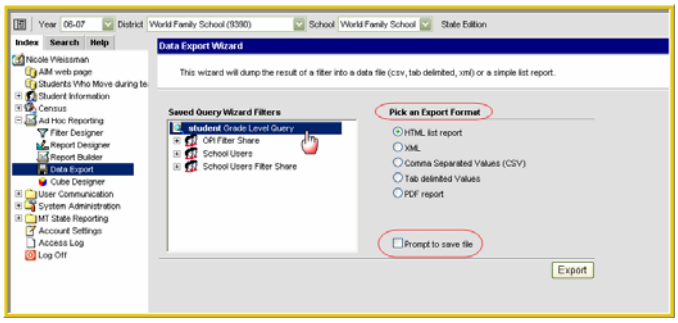


Select one of the **Saved Query Wizard Filters**.

Choose an **Export Format**.

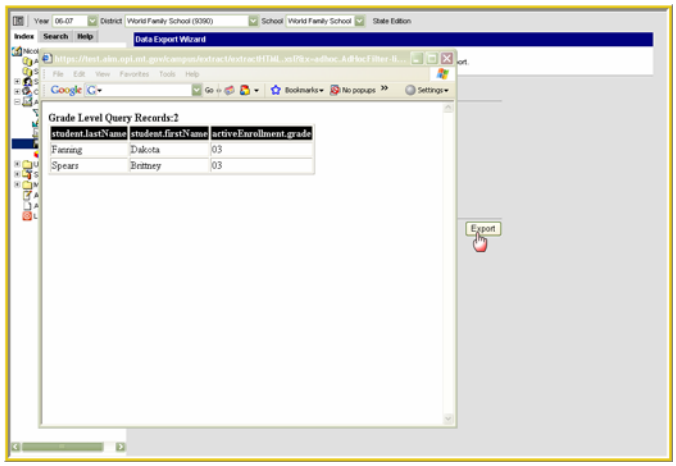
Optional: Check the *Prompt to save* file box to automatically have the option to save the export.

(See ***Export Formats*** at the end of this guide)



Click **Export**.

The **Data Export** will open in a new window based on the export format you chose.



Linda McCulloch, Superintendent
Montana Office of Public Instruction
PO Box 202501
Helena, Montana 59620-2501
www.opi.mt.gov

AD HOC REPORTING

FILTER OPTIONS	
Equal to (=)	This option will only pull students that are equal to the data entered. If only students in grade 3 are wanted on the report, select = and type 03.
Not equal to (<>)	This option will pull every student except those meeting the criteria. For example, an elementary school wanting a list of all students, except kindergarten, would select <> and type KG.
In/Not In	This option pulls students for all the values selected. The values must be separated by a comma. For example, if a K-12 school wanted all tested grades they would select In and type 03,04,05,06,07,08,10.
Like	This is a wildcard search. If a school wanted a list of all students with a last name starting with T, select Like and enter T in the criteria box. If a school is looking for an ending combination use a hyphen before the letters (e.g. (–T) – last names ending in T).
Sounds Like	This option will find similar sounding words or names. This option would be used to find students with the first name that sounds like Ann. It will find An, Ann or Anne.
Is Null/Is Not Null	These selections are used for finding data entries that are blank (null) or fields that might have data in them, but the user is unsure of what that entry might be.
Greater Than (>)	This option will return results that are greater than the value entered. This search is used for numerical values only (e.g. date, grade level).
Less Than (<)	This option will return results that are less than the value entered. This search is used for numerical values only (e.g. date, grade level).
Greater Than/Equal To (>=)	This option will return results that are greater than or equal to the value entered. This search is used for numerical values only (e.g. date, grade level).
Less Than/Equal To (<=)	This option will return results that are less than or equal to the value entered. This search is used for numerical values only (e.g. date, grade level).

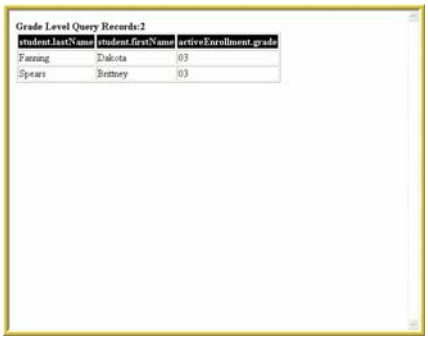
Linda McCulloch, Superintendent
Montana Office of Public Instruction
PO Box 202501
Helena, Montana 59620-2501
www.opi.mt.gov

AD HOC REPORTING

EXPORT FORMATS

HTML LIST REPORT

This option opens the report in a web-based browser.



Grade Level Query Records:2

student.lastName	student.firstName	activeEnrollment.grade
Fanning	Dakota	03
Spears	Brittney	03

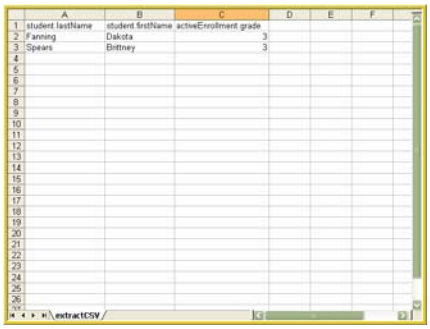
XML

This option returns the data in Extensible Markup Language.

```
<?xml version="1.0" encoding="UTF-8" ?>
- <campusRoot>
  - <Header baseURL="https://test.aim.opi.mt.gov/campus/"
      date="06/21/2007" time="04:09:50 PM" calendarCookie="876"
      calendarScope="876" schoolScope="876" districtScope="476"
      structureScope="876" yearScope="2007" appName="training2007"
      appServer="MTTestApp1" state="MT" group="" edition="state"
      userAgent="Mozilla/4.0 (compatible; MSIE 6.0; Windows NT 5.1; SV1;
      .NET CLR 1.1.4322; .NET CLR 2.0.50727)" messengerEnabled="false"
      isIE="true" isMac="false" isGecko="false" isSafari="false"
      clientIP="/10.194.52.159" appletGZips="false" refreshMinutes="5"
      refreshLimit="12" logoutDelay="5" posEnable="false" taskScheduler="true"
      simsLinked="">
      <Param name="calendarID" value="876" />
      <Param name="x" value="adhoc.AdHocFilter-listQueryData" />
      <Param name="filterID" value="145" />
      <User userID="933" username="cp8823" allModules="1" allCalendars="1"
        hideBanner="true" hideToolbar="false" personID="173779"
        lastName="Weissman" firstName="Nicole" calendarCount="1438" />
    </Header>
  - <ExportWizard>
    - <Extract name="Grade Level Query">
        <student student.lastName="Fanning" student.firstName="Dakota"
          activeEnrollment.grade="03" />
        <student student.lastName="Spears" student.firstName="Brittney"
          activeEnrollment.grade="03" />
      </Extract>
    </ExportWizard>
  </campusRoot>
```

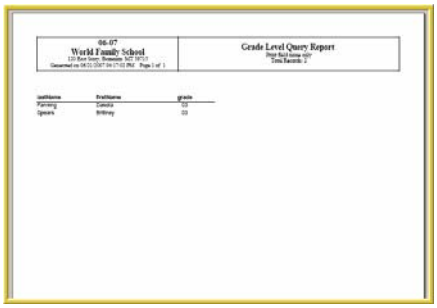

COMMA SEPARATED VALUES (CSV)

This option allows a user to open and save the report in an Excel spreadsheet, or save as a .csv file.



	A	B	C
1	student.lastName	student.firstName	activeEnrollment.grade
2	Fanning	Dakota	3
3	Spears	Brittney	3

Linda McCulloch, Superintendent
Montana Office of Public Instruction
PO Box 202501
Helena, Montana 59620-2501
www.opi.mt.gov

EXPORT FORMATS (CON'T)	
TAB DELIMITED VALUES This option opens the report in a text editor with the data values separated by tabs.	
PDF REPORT This option opens the report in a PDF report format. The school user can choose to display field name only or both field and table names.	

Linda McCulloch, Superintendent
Montana Office of Public Instruction
PO Box 202501
Helena, Montana 59620-2501
www.opi.mt.gov