

Manage State Ad hoc Filters

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Publish State Filters to Districts | Manage State Filters in District Edition | Copy State Filters | Unpublish State Filters | Republish State Filters | Export and Import Ad hoc Filters

PATH: Ad hoc Reporting > Filter Designer

Ad hoc filter publishing allows State Edition users to create and maintain Ad hoc filters which are automatically published to districts connected to the State Edition via DIS. Through this functionality, State Edition users can publish filters to connected districts, unpublish or remove State filters, and revise and republish filters back to districts, as necessary. District users also have the ability to export Ad hoc filters into a file which can be imported into State Edition.

Publish State Filters to Districts

Published filters are placed in a State Published folder (or BIE Published folder) where districts can then generate and use the filter.

Users must have Filter Desig use this functionality.	gner, State Owned Filters and Publish Filters tool rights in order
used as a search, or as input to a report.	filter. Filters can be created using the Query wizard, selection editor or a pass-through SQL Query. Ad Hoc Filters can be
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student ZZZ-All Enrollments for 09-10	Import Filter
ODE Admin ODE Admin ODE Admin (Read Only)	
E I State Published	Select the Browse button to locate and import an ad hoc filter
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4	Browse Import
Search Edit Test Copy Delete Expor	rt.
Publish Unpublish Filter History	
Create a new Folder	

Publishing an Ad hoc Filter

To publish a filter, select the filter within the **Saved Filter** window and click the **Publish** button. The filter will move to the State Published folder (or BIE Published folder).

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Ad Hoc Filter Designer			
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This wizard will walk you through the creation of a new t 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 Que	ery. Ad Hoc Filters can b
Saved Filters	TJF Resident Town problem		
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State Published	Filter Version 1, Last Updated	05/04/2011	
Student Incorrect Enrollments			
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student tif grade codes			
student TJF Resident Town problem	Filter Type	Data Type	
person TJF Staff Assignments	C Query Wizard	◯ Student	
🔍 🖹 student tif test	Selection Editor	Census/Staff	
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student ZZZ - Incorrect Enrollments - RSU75			
person ZZZ - Staff by district AAA	Create		
student ZZZ-SR-Maine- StateRequiredFields	Import Filter		
Student ZZZ-Student			
person ZZZ-Student Contacts	Select the Browse button to loca	te and import an ad hoc filter	
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		BrowseImport	
Search Edit Test Copy Delete Expo	đ		
Publish Unpublish Filter History			
Create a new Folder			

Published Filter Moved to State Published Folder

All published filters are moved and maintained within the State Published folder. This folder indicates what state filters are currently published or unpublished (greyed out) and requires unique tool rights as a means of protecting and controlling the filters from other Filter Designer users.

Once a filter has been published, users can select the filter within the State Published folder and click the **Filter History** button to view the current status of the filter's publishing process.

Status Status DELIVERED DELIVERED
5:08 DELIVERED
08 DELIVERED
:08 PENDING
:08 PENDING
:08 PENDING
:08 PENDING
5:08 PENDING -

Viewing the Status of a State Published Filter

The **Ad Hoc Filter Publish History** detail window displays the current status of a filter's publishing activity. Information is broken down by district and the **Status** indicates where the filter

is along the publishing process. A status of **DELIVERED** means the filter was successfully published to the district. A Status of **PENDING** means the filter is attempting to publish to the district but has not completed the process. A Status of **TIMEOUT** means the filter was not published to the district. A status of **TIMEOUT** is often an indication that the district is not properly synced to the State Edition via DIS.

To refresh the window and view the most up-to-date information, click the **Refresh** button. If the filter has been previously published, users may view publish history information about all versions of the filter by checking the **Show history for all versions** checkbox. See the Republishing State Filters section for more information about republishing filters.

Manage State Filters in District Edition

State-published filters can be added or removed from districts at any time. In order to properly manage these filters, notifications are provided in the Process Inbox and filters are stored in a State Published folder. When a filter is published from the state and received by the district, schools within that district will receive an indication of this within their Process Inbox.

District users **MUST** have State Owned Filters tool rights in order to access State Published filters.

Index Search Help	District Notices		
🚮 System Administrator	•		
E 🖸 Student Information	Welcome to Infinite Campus for the schools	of Vassalboro, Waterville, and Winslow.	
Instruction			
E Census	School Notices		
	 [Waterville Junior High School] 		
Attendance			
E 🔐 Scheduling	1		
🛨 🕉 Fees			
Grading & Standards	Process Inbox		
E D Medicaid	Date Range to	Display All Processes - Find Messages	
Transcripts Ad Hoc Reporting			
Ad Hoc Reporting User Communication	Delete Selected Messages		
E System Administration			
E 💼 FRAM	Process Name		Posted Date Due Date
Surveys ME State Reporting	Filter Designer The State	e of ME has just published new filter 'TJF Resident Town problem'.	05/04/2011
ME State Reporting Account Settings			04/00/0044
Access Log		e of ME has just published new filter 'Incorrect Enrollments RSU75'.	
Campus Community	Filter Designer The State	e of ME has just published new filter 'tijf grade codes'.	04/19/2011
0 Log Off	The State	e of ME has just unpublished filter 'tif test'.	04/14/2011
	Filter Designer The State	e of ME has just updated filter 'ZZZ - Staff by district AAA' to version 10.	04/14/2011

Notification of a New State Published Filter

Users can click the notification to be directed to the filter or go to the Filter Designer tool and view/generate the filter from within the State Published folder.



Viewing a Moved Ad Hoc Filter

As seen in the image above, the state-published filter **TJF Resident Town problem** was indicated in the Process Inbox notification and has been placed within the State Published folder. This filter is now ready for use by district users.

Ad Hoc Filter Designer This wizard will walk you through the creation of a new used as a search, or as input to a report.		Query wizard, selection editor or a pass-through SQL	Query. Ad Hoc Filters can be
	ZZZ - Staff by district AAA Filter Version 1, Last Updated Create New Filter Type Query Wizard Selection Editor Pass-through SQL Query Create	05/04/2011 □ Data Type □ Student □ Census/Staff □ Course/Section	

Viewing Filter Versions

Because filters can be unpublished, modified and then republished back to districts, the **Filter Version** indicates what version is currently being used. This indication is important for coordinating with the state or other schools/districts when sharing or discussing information based on the filter. The **Last Updated** field serves as a good indication of how new or recent a filter version may be. Each time a filter is modified and republished by the state, the Filter Version is



updated to reflect this change.

Copy State Filters

Once a filter is unpublished by the State it is no longer available for use by the school or district. For this reason, users may copy state published filters for personal use. Once copied, the filter will remain amongst other standard filters within the Saved Filters window and can coexist with newer, more recent versions of the state published filter.

A copied state filter becomes the user's personal filter and will not be updated when the corresponding State Published filter is updated to a newer version.

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Saved Filters	ZZZ - Staff by district AAA		
Test Folder Child Test Folder Test Folder - Tim student Copy of Test Filter student Test Filter 2 Counselors State Published student tif grade codes person sad student xinPassthroughTest student ZZZ - Staff by district AAA student ZZZ-Staff by district AAA student ZZZ-Staff by district AAA student ZZZ-Staff by Delete Edit Test Copy Delete Exp	Filter Version 10, Last Updated 05/0 Create New Filter Type © Query Wizard © Selection Editor © Pass-through SQL Query Create	4/2011 Data Type Student Census/Staff Course/Section	

Copying State Filters

To copy a filter, select the filter from within the Saved Filters window and click the **Copy** button.



Viewing a Copied State Filter

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A copy of the state filter is placed amongst other non-state published filters and can now be edited, deleted or exported as necessary.

Unpublish State Filters

State Edition users can unpublish State Published filters at any time. Once a filter has been unpublished, District Edition users can no longer view or use the filter.

Users must have Filter Designer, State Owned Filters and Publish Filters tool rights in order to use this functionality.

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		Filters can
TJF Resident Town problem		
This is where a description of	of the filter is displayed.	
Filter Version 1, Last Updated 0:	5/04/2011	
Create New		
Filter Type	Data Type	
O Query Wizard	○ Student	
Selection Editor	Census/Staff	
Pass-through SQL Query		
Create		
Create		
Import Filter		
Select the Browse button to locate	e and import an ad hoc filter	
	Browse_ Import	
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Unpublishing a State Published Filter

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To unpublish a filter, select the filter from within the State Published folder and click the **Unpublish** button. The filter will become a light grey color, indicating it is currently unpublished.

Index Search Help	District Notices		
System Administrator	•		
🗄 👧 Student Information	Welcome to Infinite Campus for the	schools of Vassalboro, Waterville, and Winslow.	
Instruction	· · · · · · · · · · · · · · · · · · ·		
🗄 🥵 Census	School Notices		
E Sehavior			
Health	• [Waterville Junior High School]]	
E Attendance			
E A Scheduling			
+ S Fees			
	Process Inbox		
Medicaid			
Transcripts	Date Range to	Display All Processes 👻 Find Messages	
Ad Hoc Reporting			
User Communication	Delete Selected Messages		
System Administration			
FRAM Surveys	Process	Name	Posted Date Due Date
Surveys ME State Reporting	🔲 🕴 🚰 Filter Designer	The State of ME has just unpublished filter 'TJF Resident Town problem'.	05/04/2011
	🔲 🚦 🚰 Filter Designer	The State of ME has just published new filter 'Incorrect Enrollments	<u>- RSU75'.</u> 04/26/2011
Access Log	🔲 🚦 📅 Filter Designer	The State of ME has just published new filter 'tijf grade codes'.	04/19/2011
O Log Off	🔲 🚦 🚟 Filter Designer	The State of ME has just unpublished filter 'tijf test'.	04/14/2011

Viewing a Moved Ad Hoc Filter

Once a filter has been unpublished by the state, users with State Published filter tool rights will receive notification of this change within their Process Alerts. This notification means the filter is no longer visible or available for generation.

Republish State Filters

Previously published and then unpublished filters can be republished back to districts.

Users must have Filter Designer, State Owned Filters and Publish Filters tool rights in order to use this functionality.



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.
Saved Filters TJF Resident Town problem TJF Resident Town problem This is where a description of the filter is displayed. This is where a description of the filter is displayed. Title Resident Town problem This is where a description of the filter is displayed. Filter Version 2, Last Updated 05/04/2011 Create New Student TJF Resident Town problem Out a Type Student TJF Resident Town problem Out a Type Outra Type Student XiP Assignments Student XiP Assignments Student XiP Staff Assignments Student XiP Staff Assignments Student XZZ - Nocrrect Enroliments - RSU75 Student ZZZ - Staff by district AAA Student ZZZ - Staff by district AAA Student ZZZ - Student Person ZZZ - Student Contacts Person ZZZ - Student Contacts
Search Edt Test Copy Delete Export Publish Unpublish Filter History Create a new Folder

Republishing a State Published Filter

To republish a filter, select the filter from the Saved Filters window and click the **Publish** button. The filter will turn from a light grey color to regular black font. This indicates the filter has been published. In the image above, because the filter has been previously published (Version 1) and then modified, the filter is now considered Version 2.

If a published filter has been edited after being published, an editing icon will display to the left of the filter name. This icon indicates the filter has been modified and must be republished in order for district users to receive modifications.

Ad Hoc Filter Designer			
This wizard will walk you through the creation of a new used as a search, or as input to a report.	filter. Filters can be created using the l	Query wizard, selection editor or a pass-through SQL Que	rry. Ad Hoc Filters can b
Saved Filters	TJF Resident Town problem		
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DOE Admin (Read Only) State Published	Filter Version 3, Last Updated 0	5/04/2011	
student Incorrect Enrollments			
🔍 🖹 person sad	Create New		
student tjf grade codes	Filter Type	Data Type	
student TJF Resident Town problem	The type	bata type	
person TJF Staff Assignments	O Query Wizard	Student	
🔍 🖹 student tjf test	Selection Editor	Census/Staff	
student xinPassthroughTest	Pass-through SQL Query		
student ZZZ - Incorrect Enrollments - RSU75	Create		
person ZZZ - Staff by district AAA			
student ZZZ-SR-Maine- StateRequiredFields	Import Filter		
Image: student ZZZ-Student Image: student ZZZ-Student Contacts	Select the Browse button to local	e and import an ad hoc filter	
4		Browse_ Import	
Search Edit Test Copy Delete Expo	rt		
Publish Unpublish Filter History			
Create a new Folder			

Understanding Filter Versions

Once the filter has been modified and republished to districts, the Filter Version is now 3 because logic treats every modification to the filter's movement in the publishing workflow as a version.

Index Search Help	-		
	District Notices		
System Administrator	•		
E 🖸 Student Information	Welcome to Infinite Campus for the	schools of Vassalboro, Waterville, and Winslow.	
Instruction			
🛨 💁 Census	School Notices		
🛨 ք Behavior	[Waterville Junior High School]	1	
🕀 🌹 Health	· [water ville Sumor High School]	1	
🗄 ở Scheduling			
🕀 💲 Fees			
Grading & Standards	Process Inbox		
🛨 🪞 Medicaid	Date Range to	Display All Processes Find Messages	
Transcripts	Date Range	Display All Flocesses + Filld Messages	
🕀 🔤 Ad Hoc Reporting	Delete Selected Messages		
E Diser Communication			
E System Administration			
E C FRAM	Process	Name	Posted Date Due Date
Surveys ME State Reporting	🔲 ! 🚏 Filter Designer	The State of ME has just updated filter 'TJF Resident Town problem' to version 3.	05/04/2011
Account Settings	🔲 ! 🚏 Filter Designer	The State of ME has just published new filter 'Incorrect Enrollments RSU75'.	04/26/2011
Access Log	🔲 🚦 📅 Filter Designer	The State of ME has just published new filter 'tif grade codes'.	04/19/2011
0 Log Off	🔲 🚦 🚰 Filter Designer	The State of ME has just unpublished filter 'tif test'.	04/14/2011

Notification of Republished Filter in District Edition.

Once a filter has been republished by the state, schools within the district will receive notification of this change within their Process Inbox. If selected, this notification will direct users to the newly updated filter as well as indicate the filter's version.

District and State Edition users have the option of exporting Ad hoc filters into a file format that can be imported into the State Edition.

Users must have Filter Designer and Export Filters tool rights in order to use this functionality.



Exporting an Ad hoc Filter

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To export a filter, select the filter from the Saved Filters window and click the **Export** button. A pop-up message will appear, asking where to locally save the file.

Ad Hoc Filter Designer This wizard will walk you through the creation of a new filt used as a search, or as input to a report. Saved Filters Test Folder Child Test Folder 2 Child Test Folder - Tim Student Copy of Test Filter Student Test Filter Counselors Counselors State Published	er. Filters can be created using the Query wizard, selection editor or a pass-through SQL Query. Ad Hoc Filters can be Tes Opening update_AdHocFilter.xml.F7C9E528-89E0-44C3-84FB-43F019C Vou have chosen to open te_AdHocFilter.xml.F7C9E528-89E0-44C3-84FB-43F019CCAD96 which is a: F7C9E528-89E0-44C3-84FB-43F019CCAD96 File from: http://10.35.172.28:888 What should Firefox do with this file? Open with Browse @ Save File Do this automatically for files like this from now on.
	OK Cancel
Search Edit Test Copy Delete Export Create a new Folder	

Saving an Exported Ad Hoc Filter

Select whether to open the file using an installed program or save it locally to a hard drive or storage device. Once saved, the file can then be imported into the State Edition.

• When opening the file, click the Browse button to select the desired program in which the filter opens. This selection applies to this and every future time the same filter is selected by the user.



- It is best to open filters in Notepad, Textpad, Wordpad, etc., unless there is a reason to export it to another format.
- A program must be chosen for every filter available to the user.

Do not modify the file name or any data within the file. Modification of these items will result in the file not being allowed to be imported.

Export and Import Ad hoc Filters

Exported Ad hoc filters can be imported into State Editions of Campus using Import Filter functionality.

Users must have Filter Designer > Import Filters tool rights in order to use this functionality. This functionality only exists within State Editions of Campus. Filters are published down to districts using Publish functionality and districts are able to send filters to the State for import using Export functionality.

Ad Hoc Filter Designer This wizard will walk you through the creation of a new filter used as a search, or as input to a report.	Filters can be created using the Query	wizard, selection editor or a pass-through SQL Qu	uery. Ad Hoc Filters can be
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	Select the Browse button to locate an	d import an ad hoc filter BrowseImport	
Search Edit Test Copy Delete Export Publish Unpublish Filter History Create a new Folder			

Importing an Ad hoc Filter

To import an Ad hoc filter, select the **Browse** button. A pop-up editor will appear, asking to select the filter from a locally stored location.



Importing the Exported Filter File

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Once the file has been selected, the file path will populate the field to the left of the Browse button and is now ready to be imported. Select the **Import** button to import the file.

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.				
Saved Filters Saved Filters C Student Imported Copy of Test Fit C student Incorrect Enrollments C person JonDistrict C	Created copy named: Imported Copy of Test Filter			
	OK Selection Editor Pass-through SQL Query Create Import Filter Select the Browse button to locate and im C:\Users\nate.miller\Desktop\update_Adit + elete Export			
Create a new Folder				

Confirmation of Imported File

Once the Import button is selected, a pop-up message will appear, indicating the filter was imported and listing the filter name.



Viewing an Imported Filter

The imported filter will now appear within the Saved Filters window and is able to edited, copied, deleted or published as desired.