

SELECTION EDITOR

Path: *Ad Hoc Reporting > Filter Designer > Selection Editor*

- The Selection Editor Provides a list of all Students or Census/Staff to be selected for a report.
- Steps:
 1. Input a Descriptive **Selection Name** (*The Short and Long Description are optional*)
 2. Enter one or all of the selections under **Quick Search**
 - ❖ **Active Today:** Yes, No or Both
 - ❖ Select the **Grade** to filter the students
 - ❖ Enter a **Name** to filter the students (*Must be entered in last name, First name format*)
 - ❖ Choose a **Sort** option to filter students by:
 - Grade, then by last and first name- default
 - Last name, First name only
 - **NOTE:** If a grade is selected, sort options will be disabled
 3. Select the students to include in the selection report from the **All Student** list on the left
 - ❖ Highlight students from the **All Student** list
 - ❖ Click the ---> button to move students to **Selected Students** list on the right
 - ❖ **NOTE:** To select all students on the list highlight the first student name, hold the shift key on the keyboard and select the last student name.
 4. Removing students from the **Selected Student** list
 - ❖ Highlight the students
 - ❖ Click the <--- button to move them back to the **All Student** list
 5. Save the report by choosing
 - ❖ **User Account** radio button: to save to a folder or your account
 - ❖ **User Groups** radio button: to save to one or multiple user groups
 - If saved to multiple user groups, each group can independently edit the filter without effecting another user groups copy
 6. Click **Save** icon when complete

DATA EXPORT

Path: *Ad Hoc Reporting > Data Export*

- This tool allows users to view the Ad Hoc results in various report formats
- Steps to export the ad hoc report
 1. Select the report from the **Saved Filter** window
 2. Choose the desired **Export Format** by clicking the desired radio button
 3. Click **Export**
- You are also able to **Search, Edit, Test, Copy and Create a new Folder** on the main Data Export Page
 1. **Search:** Displays students within the Report to show on the left, Search list
 2. **Edit:** Redirects to the edit area where the report was created in order to edit the Filter
 3. **Test:** Auto-populates an HTML view of the report
 4. **Copy:** Creates a copy of the report (Will be titled *Copy of 'report name'*)
 5. **Create a new Folder:** Creates a folder
 - To create a sub-folder, select the main folder under the **Parent Folder** dropdown
 - To create a main Parent Folder, leave the **Parent Folder** selection to (No Parent) *default*