*Quick Reference Guide:*

Ad Hoc Reporting

This guide will help districts utilize the Ad Hoc Reporting tools in the MT Edition. Use of the Ad Hoc Reporting tool is essential for data verification.

Topics covered in this Quick Reference Guide include:

- *Creating an Ad Hoc Report*
- *Using an Ad Hoc Report*
- *State Published Ad Hoc Reports*
- *Sharing Ad Hoc Reports within a district*
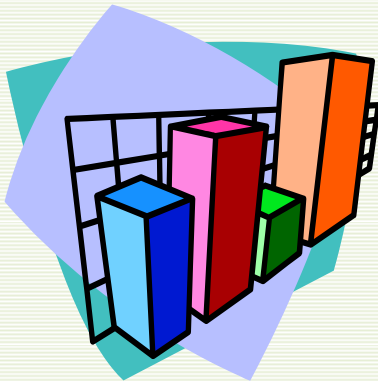
This guide is designed familiarize users with the Ad Hoc Reporting tools available in the MT Edition of Infinite Campus. Ad Hoc Reports are essential for the verification of data, and their proper use will facilitate comparisons between a district's source data and MT Edition data.

Before beginning, consider the following:

1. **What is Ad Hoc Reporting?**
   - Ad hoc reporting is "at hand" reporting – tools that can be used for a particular task. *page 2*
2. **Why should I use the Ad Hoc Reporting tools in my MT Edition?**
   - Ad Hoc reports are essential for verifying both data *within* the MT Edition and *between* the district's source data and the MT Edition. *page 2*
3. **What can I do with Ad Hoc Reports once I create them?**
   - Ad Hoc reports can be used for a variety of tasks, including verifying enrollment numbers, checking program counts and generating a list of students. *page 2*
4. **What are State Published Ad Hoc Reports?**
   - The state has the option to create Ad Hoc reports and share them directly with districts. These reports are a great starting tool for districts. *page 3*
5. **Can I share these Ad Hoc Reports I created with other district users?**
   - Districts may share Ad Hoc reports with other users, depending upon user rights. *page 6*

March 2017

Ad Hoc Reports

Ad Hoc Reports

The Merriam-Webster online dictionary defines "Ad Hoc" as "*for the particular end or case at hand without consideration of wider application*".

Ad Hoc reporting in the AIM MT Edition is just that – the creating of simple reports for a specific set of data elements.

Common Ad Hoc reports are enrollment counts, program counts (e.g., number of students in Title I), graduate counts, etc. These reports, of themselves, do not draw conclusions or show relationships between sets of data. Their primary purpose is to verify data.
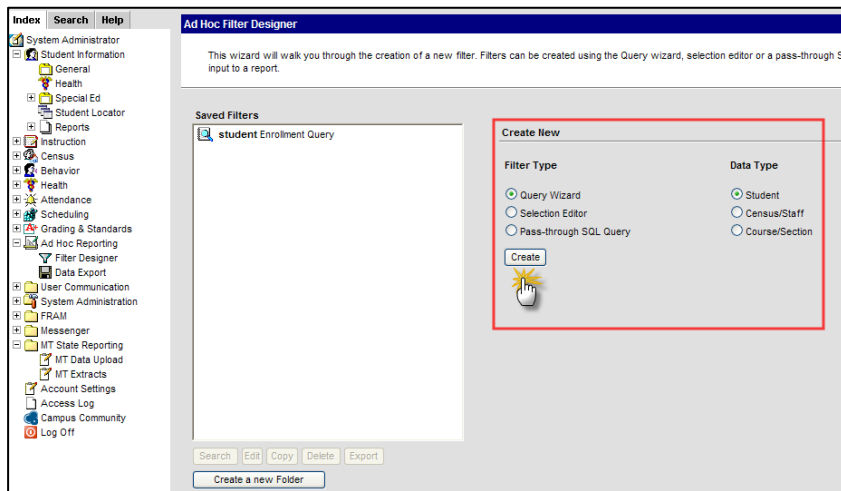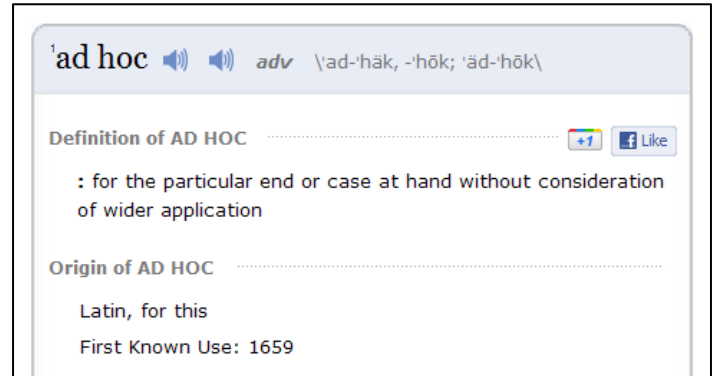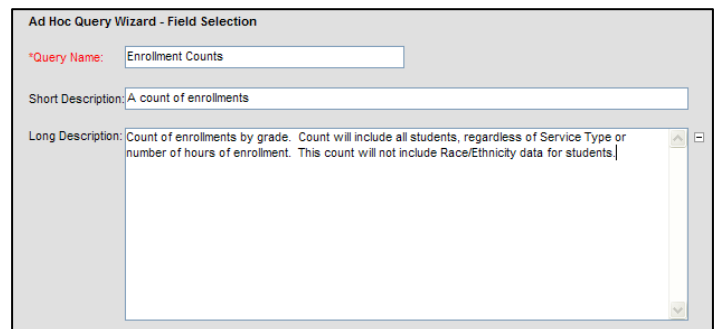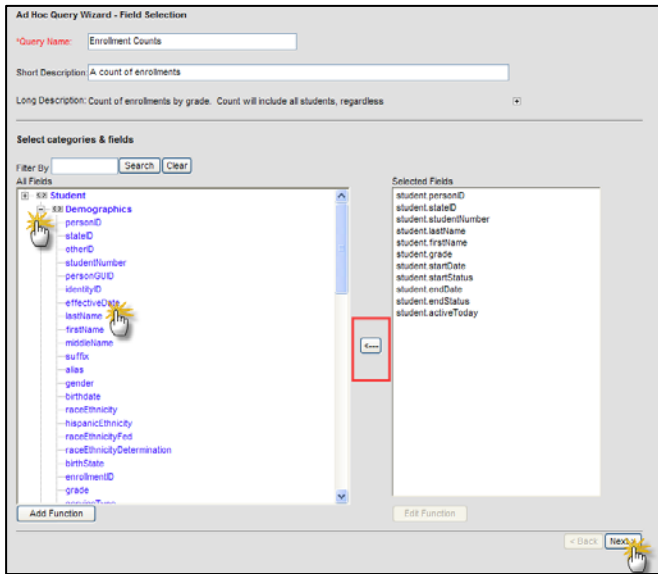

Creating Ad Hoc Reports

From the **Index**, expand Ad Hoc Reporting and select *Filter Designer*.

Under **Create New**, select **Filter Type**: *Query Wizard* and **Data Type**: *Student*. Click *Create*.

Give the Query a name. Enter a *Short* and *Long Description* if desired.

Expand/close sections by clicking the plus (+) and minus (-) signs next to the name.

Select data elements by clicking the field names. Data elements can be removed by selecting the field name from *Selected Fields* and then clicking the back arrow between *All Fields* and *Selected Fields*.

Click **Next**.

*See **page 13** for a listing of suggested fields for specific **Ad Hoc Reports**.*

Filter the Data

To set filters, select the type of filter from the Operator field and enter the Value.

Example:

To create a report for Kindergarten enrollment, select *equals (=)* from the **Operator** and enter *KF* in the **Value** field.

Click **Next**.

Format the Output File/Report

The next screen establishes the format of the report. Formatting is most important when printing in PDF format, or if the report is being used for a presentation.

Output

If the Output box is checked, a data element will appear on data export.

Example:

If the report is titled _Grade KF Enrollment_, the element may be needed to filter for grade KF, but does not have to appear on the actual printed report.

Field	Output
student.personID	☑
student.stateID	☑
student.studentNumber	☑
student.lastName	☑
student.firstName	☑
student.grade	☐
student.startDate	☑
student.startStatus	☑
student.endDate	☑
student.endStatus	☑
student.activeToday	☑

Format the output file/report.

Field	Output	Seq
student.personID	☑	
student.stateID	☑	
student.studentNumber	☑	
student.lastName	☑	
student.firstName	☑	
student.grade	☐	
student.startDate	☑	1
student.startStatus	☑	2
student.endDate	☑	
student.endStatus	☑	
student.activeToday	☑	

Sequence

Sequence determines the order of the data elements in the report. Enter a "1" in the field that should be listed first, "2" in the second, etc.

NOTE: If only "1" and "2" are entered, the rest of the elements will appear in the order they are listed.

Format the output file/report.

Field	Output	Seq	Sort	Direction
student.personID	☑			
student.stateID	☑			
student.studentNumber	☑			
student.lastName	☑		1	Ascend ⌄
student.firstName	☑		2	Ascend ⌄
student.grade	☐			
student.startDate	☑	1		
student.startStatus	☑	2		
student.endDate	☑			
student.endStatus	☑			
student.activeToday	☑			

Sort

The Sort field determines how the report should be sorted. Enter a number "1" in the first Sort field, "2" in the second, etc, then indicate the sort direction (ascending or descending).

Format the output file/report.

Field	Output	Seq	Sort	Direction	Column Header
student.personID	☑			⌄	
student.stateID	☑			⌄	State ID
student.studentNumber	☑			⌄	
student.lastName	☑		1	Ascend ⌄	
student.firstName	☑		2	Ascend ⌄	
student.grade	☐			⌄	
student.startDate	☑	1		⌄	
student.startStatus	☑	2		⌄	
student.endDate	☑			⌄	
student.endStatus	☑			⌄	
student.activeToday	☑			⌄	

Column Header

What is entered in Column Header changes the name of the field on the export file. For example, entering a Column Header in the second line will change student.stateID to State ID on the export file.

**Ad Hoc Reports**

AIM
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Montana's State Student Information System

Montana
Office of Public Instruction
Denise Juneau, State Superintendent
opi.mt.gov

Alignment

Alignment determines the justify of the column header – left, right or center.

Format the output file/report.

Field	Output	Seq	Sort	Direction	Column Header	Alignment
student.personID	☑					Center ▾
student.stateID	☑			▾	State ID	Center ▾
student.studentNumber	☑					Center ▾
student.lastName	☑		1	Ascend ▾		Center ▾
student.firstName	☑		2	Ascend ▾		Center ▾
student.grade	☐			▾		▾
student.startDate	☑	1		▾		Center ▾
student.startStatus	☑	2		▾		Center ▾
student.endDate	☑			▾		Center ▾
student.endStatus	☑			▾		Center ▾
student.activeToday	☑			▾		Center ▾

Format the output file/report.

Field	Output	Seq	Sort	Direction	Column Header	Alignment	Formatting	Length
student.personID	☑			▾		Center ▾	▾	
student.stateID	☑			▾	State ID	Center ▾	▾	
student.studentNumber	☑					Center ▾	▾	
student.lastName	☑		1	Ascend ▾		Center ▾	▾	
student.firstName	☑		2	Ascend ▾		Center ▾	▾	
student.grade	☑			▾		▾	Zero Pad ▾	2
student.startDate	☑	1		▾		Center ▾	▾	
student.startStatus	☑	2		▾		Center ▾	▾	
student.endDate	☑			▾		Center ▾	▾	
student.endStatus	☑			▾		Center ▾	▾	
student.activeToday	☑			▾		Center ▾	▾	

Formatting and Length

Formatting is how the column will appear on the report. Zero padding adds zeros to a number to make it a set length.

Length is how many characters the field should be. Setting the length at 2, with Zero Padding selected, will make the grade appear as 01, 02, 03, etc.

Click *Next*.

Grouping and Aggregation

Grouping and Aggregation allows the user to group results by type and produces a count of that type.

Example:
To group by grade, choose Grouping, Tier 1, **Group by**: *student.grade* and **Group Order**, *Ascending*, then **Aggregate/Sub Total by**: *student.state ID* and **Aggregate Type**, *Record Count*.

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

Grouping	Group by	Group Order
Tier 1	student.grade ▾	Ascending ▾
Tier 2	▾	Ascending ▾
Tier 3	▾	Ascending ▾
Tier 4	▾	Ascending ▾
Tier 5	▾	Ascending ▾

Aggregate/Sub Total by	Aggregate Type
student.stateID ▾	Record Count ▾
▾	▾
▾	▾
▾	▾

Save To: ⦿ User Account
Folder: / ▾

○ User Groups

[Save] [Save & Test]

Ad Hoc Reports

Using Ad Hoc Reports

Ad Hoc reports are useful for comparing data between the district's source data and the MT Edition of AIM. If the district does not have a Student Information System, Ad Hoc reports can be used to verify data with district staff.

Exporting Ad Hoc Reports

Once filters are created, they can be exported in a variety of formats.

The three most common types of formats are HTML list report, Delimited values (CSV) and PDF report.

The HTML list report view opens in a new internet window. It cannot be sorted and does not print well. It is best used for viewing results on screen or copying into a spreadsheet (Ctrl A, Ctrl C, then Ctrl C into an Excel spreadsheet).

Ad Hoc Reports

The Delimited Values (CSV) format exports the report to Excel. It is the best format for sorting, but may require modification to print well. It is best used for advanced reporting or combining with additional data.

The PDF report format exports the report to Adobe. It is the best format for viewing, but does not allow additional sorting. It is best used for printing reports for verification or presentation of data.

It is important to note that Ad Hoc reporting results are determined by the *Year*, *School*, and/or *Calendar* selected. Reports do not have to be re-created for each calendar year – simply select the *Year* and *School* you wish to view data for. If a field such as "*End Year*" is selected, and a filter entered for a particular year, the results may be skewed if a different year is selected on the User Interface.

Ad Hoc Reports

Using Ad Hoc Reports with Search Tools

Ad Hoc reports are also used in conjunction with Infinite Campus search tools.

Click the **Search** tab. *Search for a: Student*. Click *Advanced Search*.
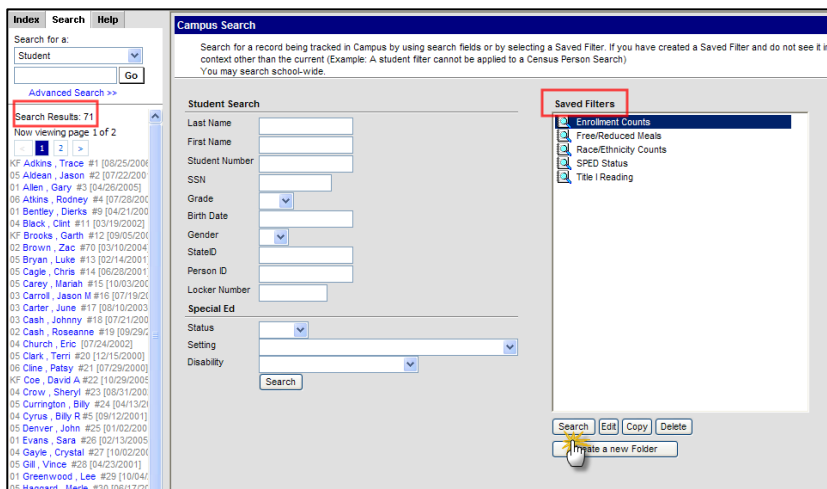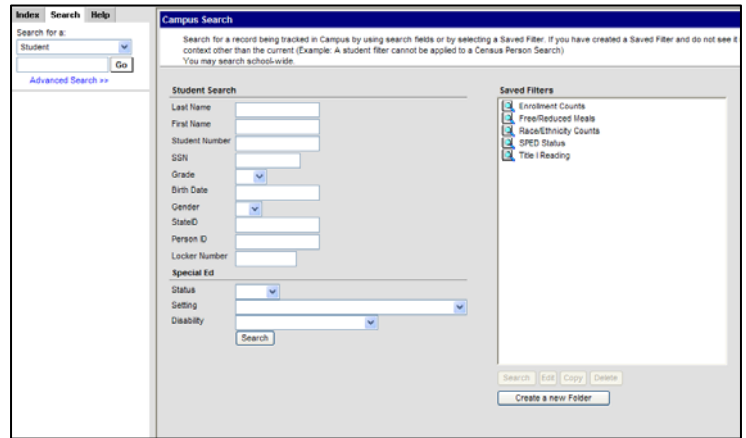
Select a filter from **Saved Filters**. Click the *Search* button directly under the **Saved Filters** box. The results appear as *Search Results* on the left.

Search results may be further refined by using the Student Search tools.

Example:
Select a filter from **Saved Filters**. Choose additional filters from the **Student Search** (e.g., *grade level 02*). Click the *Search* button under **Student Search**.

The results appear as *Search Results* on the left.

Ad Hoc Reports
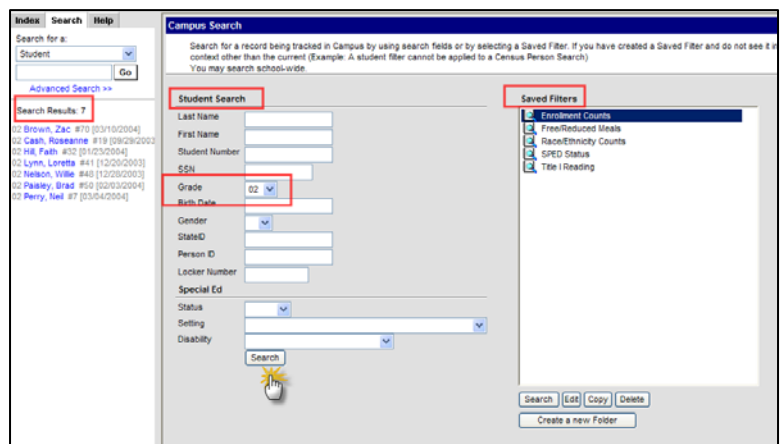
State Published Filters

OPI AIM Staff will be publishing filters specific to upcoming collections. Districts may opt to use these filters, or save and modify them for their reporting purposes.

State Published filters appear under their own header under **Saved Filters**.
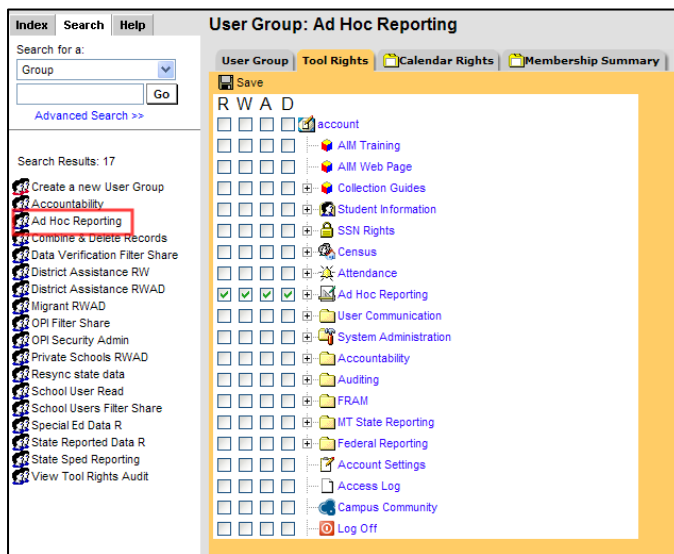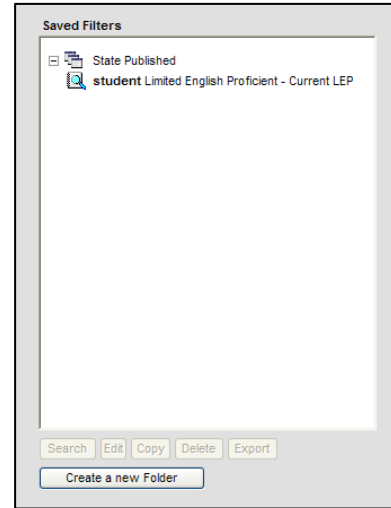
Only staff with *All Tools/All Calendars* will have access to the State Published Filters, unless **User Rights** are modified**.**

Click the **Search** tab. *Search for a:* **Group**. Click *Ad Hoc Reporting* under **Search Results**.

Select the **Tool Rights** tab.

Expand **Ad Hoc Reporting** and **Filter Designer**. Check **R**, **W**, **A** and **D** for *State Owned Filters*.

Click *Save*.
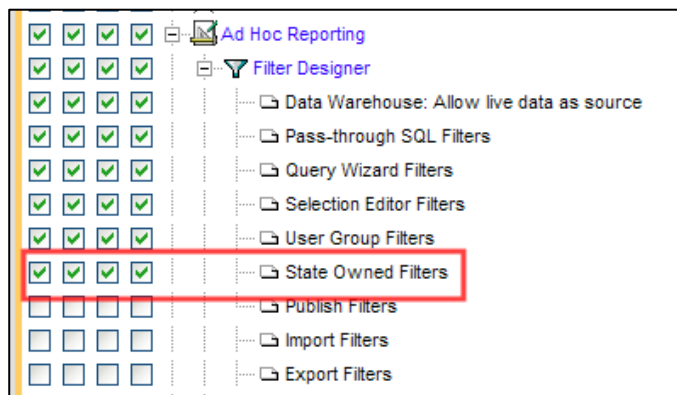
Ad Hoc Reports

Organizing and Sharing Ad Hoc Filters

Ad Hoc filters can be organized into folders and shared with others users and/or groups.
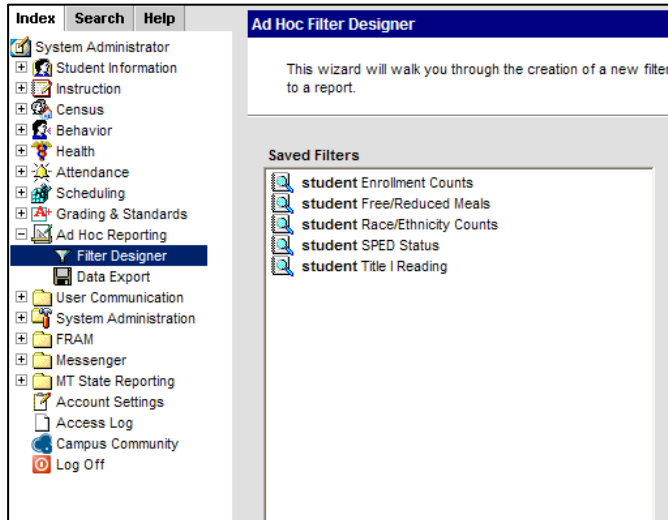
Organizing Ad Hoc Filters

Folders can be created for Ad Hoc Reports, so that like filters may be stored together.

From the **Index**, expand **Ad Hoc Reporting** and select *Filter Designer*.

Click *Create New Folder*.

Folders can be independent (enter *Folder Name*) or connected to other folders (select *Parent Folder* and enter *Folder Name*).

Click *Save*.
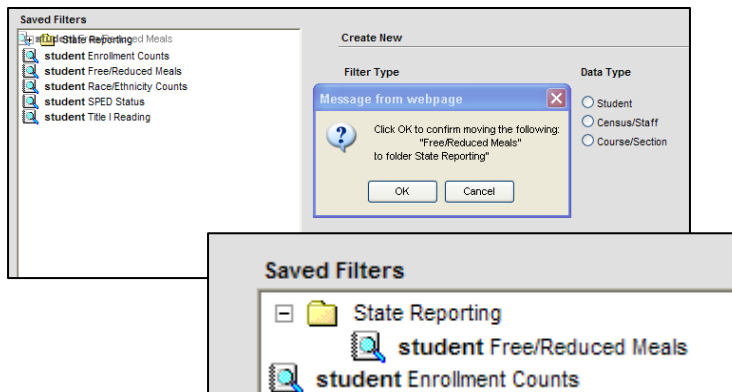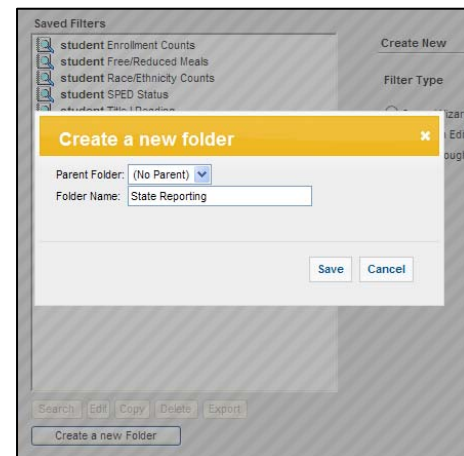
To move items into folders, click the name of the filter under **Saved Filters**, and drag to the folder.

Confirm the move by clicking *OK*.

Ad Hoc Reports

Filters may also be added to folders as they are created. The **Filter**, **Output**, and **Group** pages all have options to save filters into a folder.
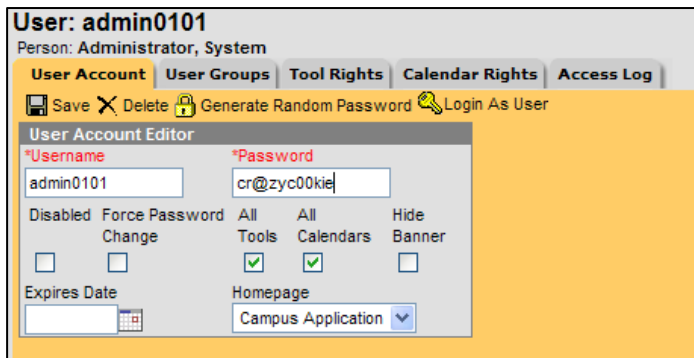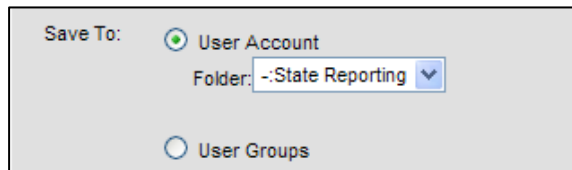
Sharing Ad Hoc Filters

Ad Hoc filters may also be shared with groups. Both the person creating the filter and the person using the filter must have access to the same group.

If a user has access to *All Tools/All Calendars*, they must also be added to the group to share filters.

Click the **Search** tab. *Search for a:* **User**. Enter the user's last name and click *Go*.

Click the grey *User Name* and select the **User Groups** tab.

Click the **User Groups** to add (users can share Ad Hoc reports with any group they are a member of). Click *Save*.
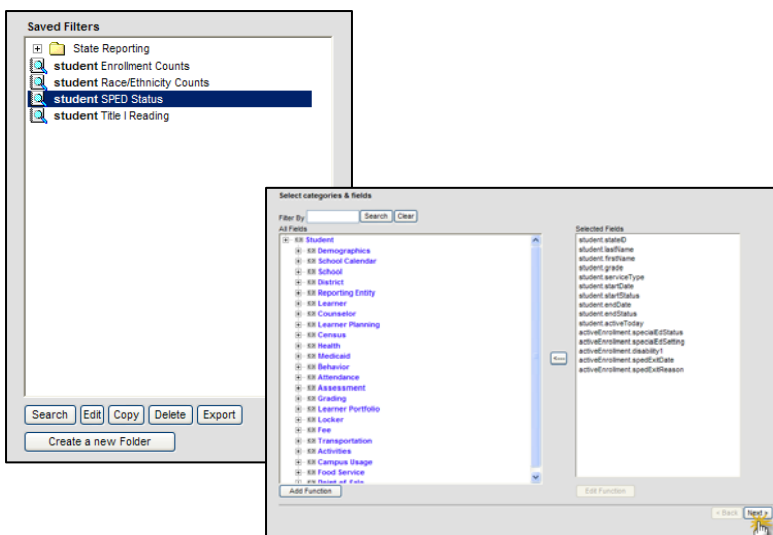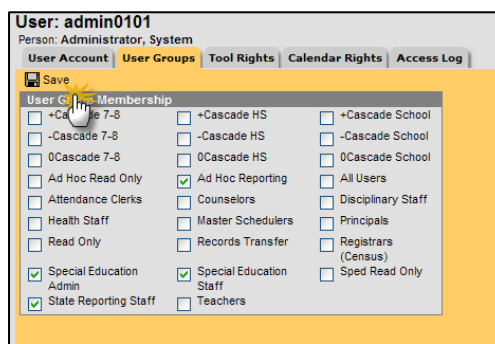
Return to Ad Hoc Reporting/Filter Designer.

Select a **Saved Filter** and click *Edit*.

Click *Next*.

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Montana's State Student Information System

Montana Office of Public Instruction
Denise Juneau, State Superintendent
opi.mt.gov

Under *Save To:* choose *User Groups*. Select the user group to share the filter with.

Click **Save**.

Copying Ad Hoc Filters

State Published or User Group filters should not be modified by a user.

Copying filters to a User Account maintains the integrity of the filter.
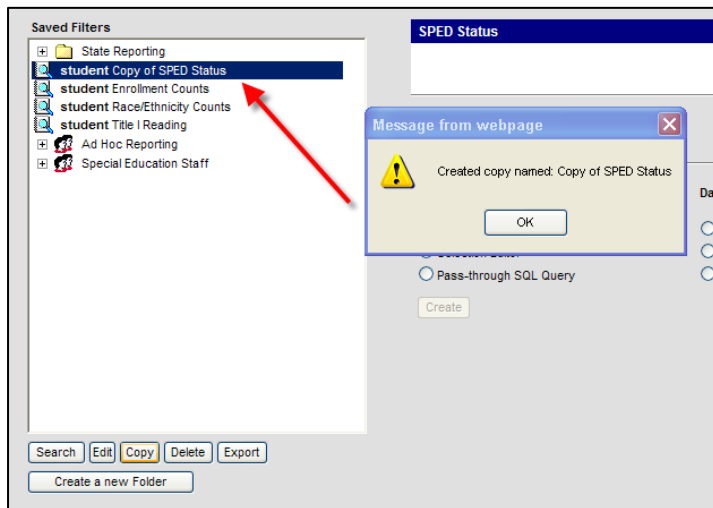
From **Filter Designer**, select a *Saved Filter*. Click **Copy**.

Click **OK**. A copy of the filter will save to your User Account. Click Edit to re-name the filter or add it to a different folder (if desired).

Ad Hoc Reports

Ad Hoc Reporting Examples

SECTION	SUB-SECTION	SUB-SECTION	FIELD	OPERATOR	VALUE
Active Enrollment as of Today					
This Ad Hoc reports shows all currently enrolled students as of the current date.					
Demographics			stateID		
Demographics			studentNumber		
Demographics			lastName		
Demographics			firstName		
Demographics			gender		
Demographics			grade		
Demographics			startDate		
Demographics			startStatus		
Demographics			endDate		
Demographics			endStatus		
Demographics			raceEthnicity		
Demographics			serviceType		
Demographics			activeToday	=	1
Demographics			endYear		

Dropouts

This Ad Hoc report shows all students with an End Status of 300, 310, 320, 330 or 340 in the year selected on the Campus Toolbar. These students will count as dropouts in the year they were last enrolled.

SECTION	SUB-SECTION	SUB-SECTION	FIELD	OPERATOR	VALUE
Demographics			stateID		
Demographics			studentNumber		
Demographics			lastName		
Demographics			firstName		
Demographics			startDate		
Demographics			startStatus		
Demographics			endDate		
Demographics			endStatus	LIKE	3%
Learner	Active Enrollment	State Reporting elements	dropoutCode		
Demographics			grade		
Demographics			gender		
Demographics			raceEthnicity		
School			name		
Demographics			label		

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Graduates

This Ad Hoc reports shows all students with an End Status of 400: Graduated in the year indicated on the Campus Toolbar.

SECTION	SUB-SECTION	SUB-SECTION	FIELD	OPERATOR	VALUE
Demographics			stateID		
Demographics			studentNumber		
Demographics			lastName		
Demographics			firstName		
Demographics			endStatus	=	400
Learner	Active Enrollment		diplomaDate		
Learner	Active Enrollment		diplomaType		
Learner	Active Enrollment		diplomaPeriod		

Ad Hoc Reports

Race/Ethnicity

This Ad Hoc reports shows Race/Ethnicity for students enrolled in the year indicated on the Campus Toolbar.

SECTION	SUB-SECTION	SUB-SECTION	FIELD	OPERATOR	VALUE
Demographics			stateID		
Demographics			studentNumber		
Demographics			lastName		
Demographics			firstName		
Demographics			grade		
Demographics	Federal Race		hispanicLatino		
Demographics	Federal Race		americanIndian	To verify Native American student counts, set Operator to =	To verify Native American student counts, set Value to 1
Demographics	Federal Race		asian		
Demographics	Federal Race		blackOrAfricanAmerican		
Demographics	Federal Race		pacificIslander		
Demographics	Federal Race		white		
Demographics			activeToday	=	1

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Ad Hoc Reports