*Quick Reference Guide:*

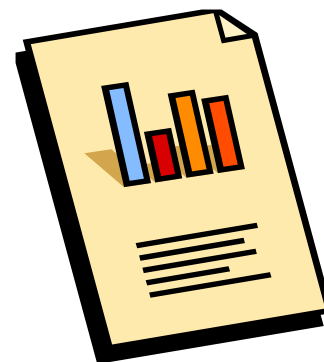# *State Published Ad Hoc Reports*

This guide will show districts how state published filters can be used and/or modified at the district level.

Topics included in this Quick Reference Guide include:

- *Finding state published Ad Hoc filters*
- *Copying state published Ad Hoc filters*
- *Modifying state published Ad Hoc filters*
- *Using state published Ad Hoc filters*
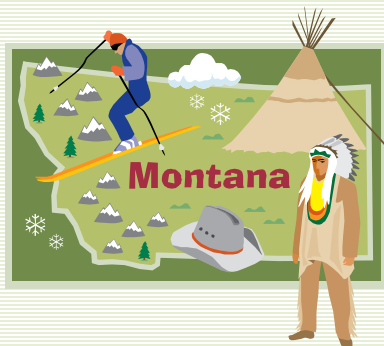
State published Ad Hoc Reports is a tool new to MT Edition applications. With this tool, the state can create Ad Hoc reports, then publish them to districts for use in verifying data.

AIM System Administrators can copy the reports and/or share them with other district users who have access to Ad Hoc Reporting groups.

Districts may not modify the actual state published Ad Hoc Report – allowing districts to have an original to return to if necessary.

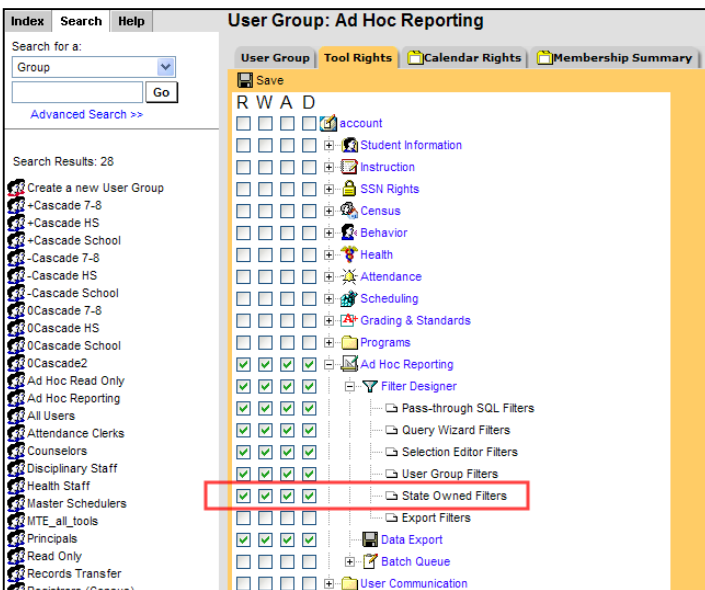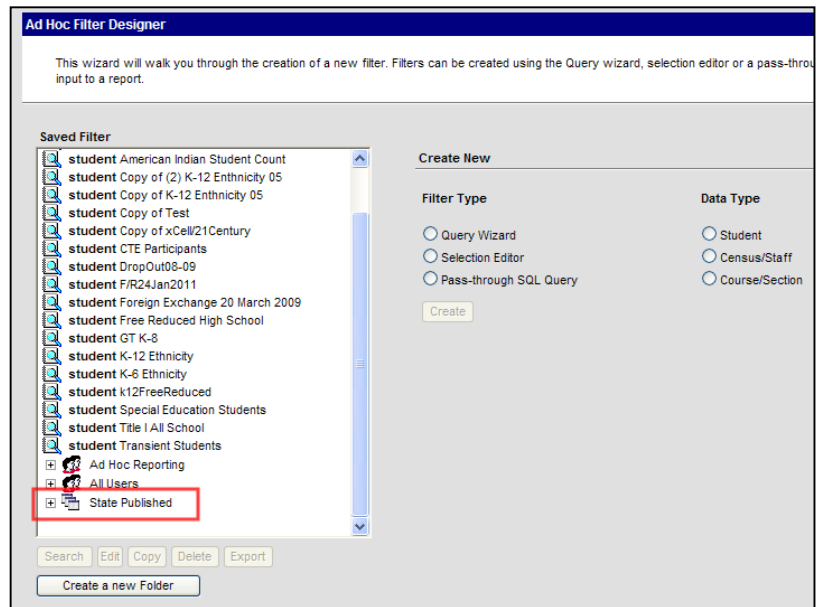Before beginning this process, there are a few considerations:

1. **How do I access state published Ad Hoc Reports?**
   - Users must have access to MTE_all_tools or the district must modify the Ad Hoc Reporting Group to have access to state published Ad Hoc Reports. *page 2*
2. **Why should state published Ad Hoc Reports be copied?**
   - Copying state published Ad Hoc Reports allows a district to see the report logic and make district level modifications to the Ad Hoc Report. *Page 4*
3. **How do I modify a state published Ad Hoc Report?**
   - To modify a state published Ad Hoc Report a user will first need to copy the report to their Saved Filters or to another Ad Hoc Reporting group. *page 4*
4. **How are state published Ad Hoc reports used?**
   - Districts may use state published Ad Hoc Reports just as they do any other Ad Hoc Report. The parameters of the report are set to verify a particular set of data (as determined by the current collection). *page 5*

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State Published Ad Hoc Reports

STATE PUBLISHED AD HOC REPORTS

State published Ad Hoc reports are shown as a separate group – the same as other Ad Hoc Reporting groups.

A user must either belong to the group MTE_all_tools (formerly All Tools), or have rights to state published filters through another user group.

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 input to a report.

Saved Filter

- student American Indian Student Count
- student Copy of (2) K-12 Enthnicity 05
- student Copy of K-12 Enthnicity 05
- student Copy of Test
- student Copy of xCell/21Century
- student CTE Participants
- student DropOut08-09
- student F/R24Jan2011
- student Foreign Exchange 20 March 2009
- student Free Reduced High School
- student GT K-8
- student K-12 Ethnicity
- student K-6 Ethnicity
- student k12FreeReduced
- student Special Education Students
- student Title I All School
- student Transient Students
- Ad Hoc Reporting
- All Users
- State Published

Create New

Filter Type | Data Type
○ Query Wizard | ○ Student
○ Selection Editor | ○ Census/Staff
○ Pass-through SQL Query | ○ Course/Section

Create

Search | Edit | Copy | Delete | Export

Create a new Folder

User Group: Ad Hoc Reporting

Index | Search | Help

Search for a:
Group

Go

Advanced Search >>

Search Results: 28

Create a new User Group
+Cascade 7-8
+Cascade HS
+Cascade School
-Cascade 7-8
-Cascade HS
-Cascade School
0Cascade 7-8
0Cascade HS
0Cascade School
0Cascade2
Ad Hoc Read Only
Ad Hoc Reporting
All Users
Attendance Clerks
Counselors
Disciplinary Staff
Health Staff
Master Schedulers
MTE_all_tools
Principals
Read Only
Records Transfer
Registrars (Census)

User Group | Tool Rights | Calendar Rights | Membership Summary

Save

R W A D
- account
- Student Information
- Instruction
- SSN Rights
- Census
- Behavior
- Health
- Attendance
- Scheduling
- Grading & Standards
- Programs
- Ad Hoc Reporting
  - Filter Designer
    - Pass-through SQL Filters
    - Query Wizard Filters
    - Selection Editor Filters
    - User Group Filters
    - State Owned Filters
    - Export Filters
  - Data Export
  - Batch Queue
- User Communication

Modifying an Existing Ad Hoc Group

Click the **Search** tab. *Search for a: Group*. Click *Go*.

Choose an existing user group. Click the **Tool Rights** tab.

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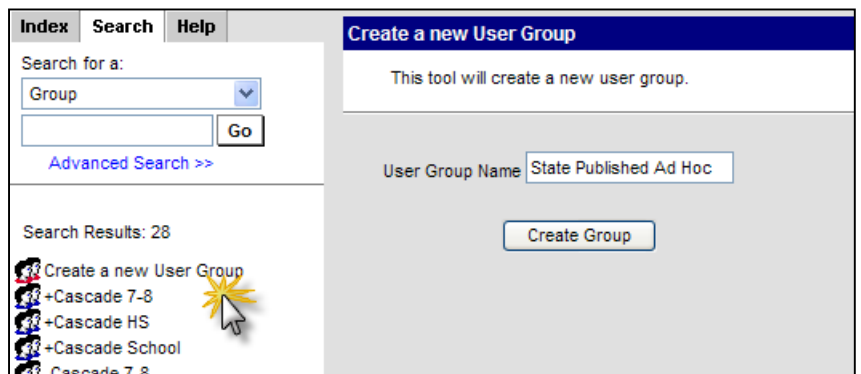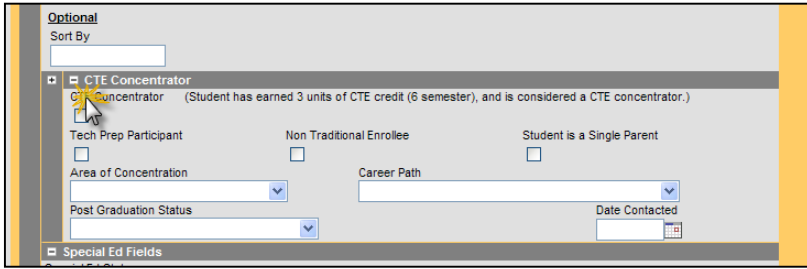
Click *Save*.

Creating a New Ad Hoc Group

Districts may wish to create a new **Tool Rights** group for state published Ad Hoc Reports.

Under *Search Results*, click **Create a New User Group**.

Enter *Group Name* and click **Create Group**.

Index | Search | Help

Search for a:
Group

Go

Advanced Search >>

Search Results: 28

Create a new User Group
+Cascade 7-8
+Cascade HS
+Cascade School
-Cascade 7-8

Create a new User Group

This tool will create a new user group.

User Group Name | State Published Ad Hoc

Create Group

opi.mt.gov

Click the **Tool Rights** tab. Expand *Ad Hoc Reporting* and *Filter Designer*.

Check **R**, **W**, **A**, and **D** for *State Owned Filters*.

Click *Save*.

Assign users to the new **User Group**.

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

Click the grey user name and the **User Groups** tab.

Check *State Published Ad Hoc* (or the group with access to state published Ad Hoc Reports).

Click *Save*.
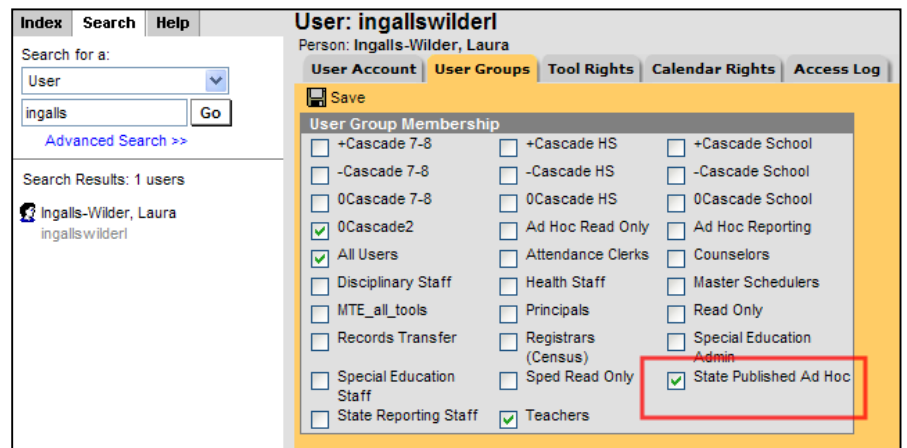
PLEASE NOTE:

New functionality in Infinite Campus prevents a user from having access to data through Ad Hoc Reporting they do not have access to through Tool Rights. For example, a Special Education teacher who has access to State Published filters will not be able to run a Free/Reduced Meal Status report from that group, unless the teacher first has access to those fields through User Groups and/or Tool Rights.
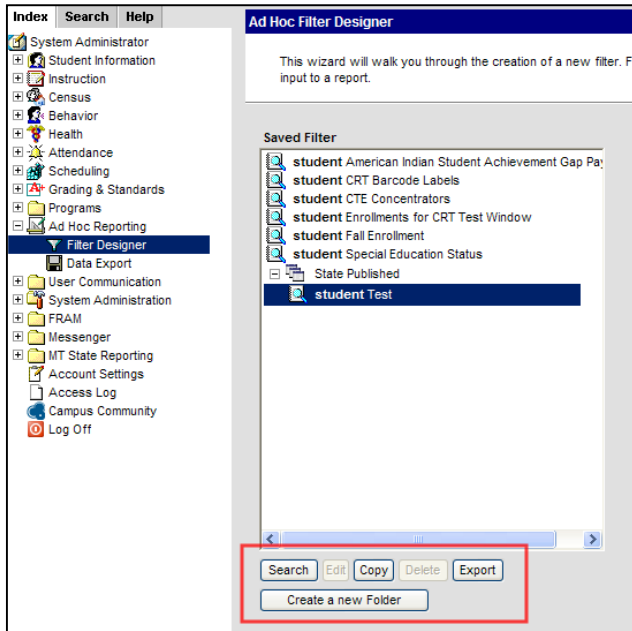
Once published at the state level, Ad Hoc filters will be available under the group *State Published*.

From the **Index**, expand **Ad Hoc Reporting** and select *Filter Designer*. Under **Saved Filter**, expand *State Published*.

Choose a filter. The filter may not be edited or deleted.

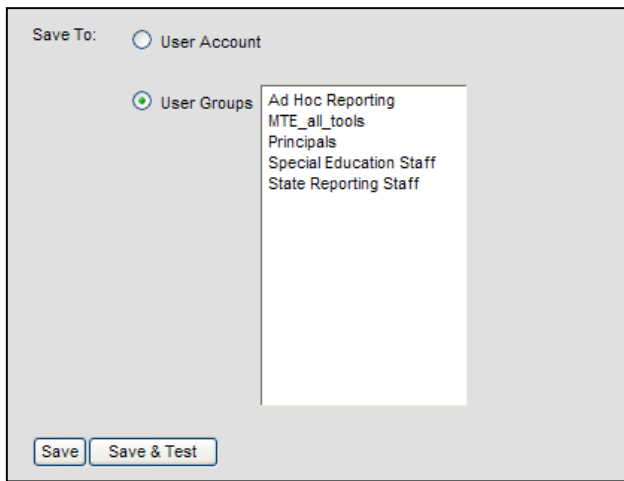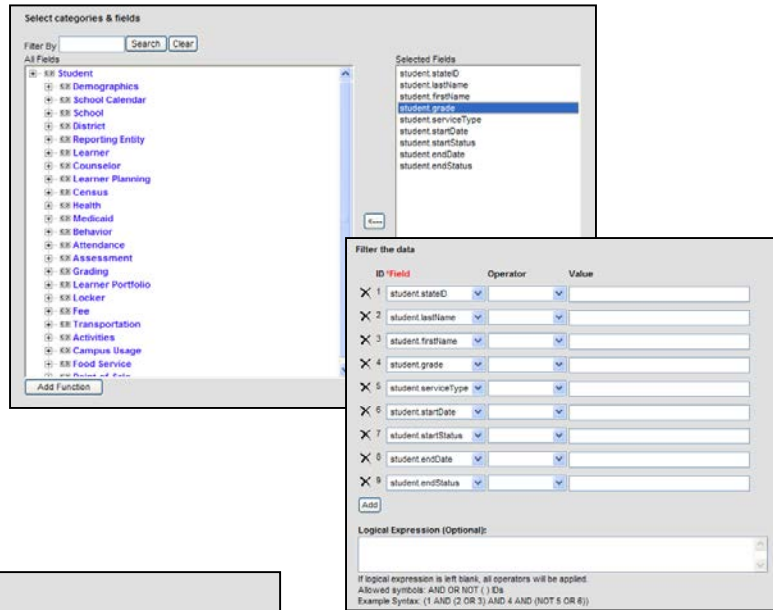To edit or view the parameters of the report, click Copy.

A copy of the report will be created under the user's filters.
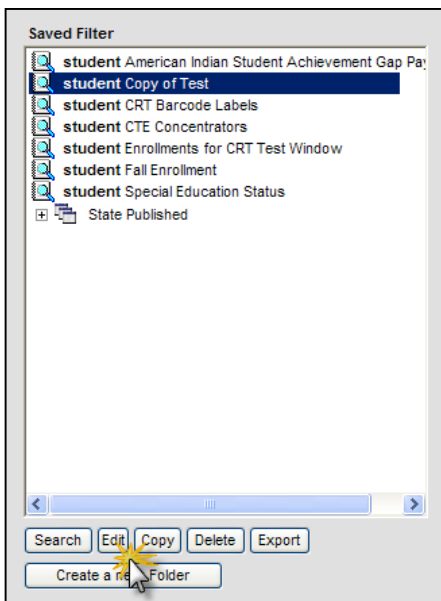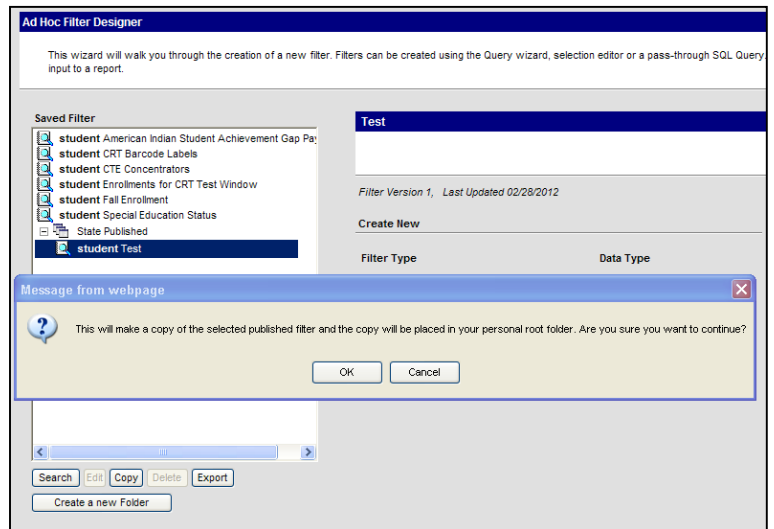
Select the copy of the filter and click *Edit*.

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The user may now add/delete fields or change filter criteria…

Or save to another **User Group**.

NOTE: A filter saved to another User Group may be modified and/or deleted by any user in that group. Only filters in the State Published group are locked.

State published Ad Hoc Reports are used the same as any other Ad Hoc Reports.

From the **Index**, expand **Ad Hoc Reporting** and select *Data Export*.

Option 1: Expand State Published and select a filter

Option 2: Select a copied state published Ad Hoc filter

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State Published Ad Hoc Reports
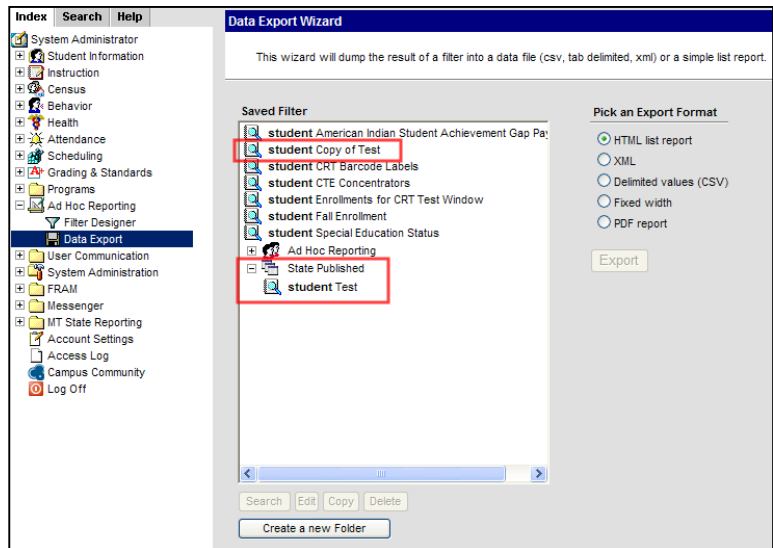
Choose an **Export Format**.

Click *Export*.

Ad Hoc Reports may also be used with **Advanced Search**.

Choose *Year* and *School*.

Click the **Search** tab. *Search for a:* **Student**. Click *Advanced Search*.

Choose a **Saved Filter**. Click *Search* under the **Saved Filter** box.

To add additional criteria, select from the fields under **Student Search**. Click *Search* under **Student Search**.

The results will appear under **Search Results** on the left.