

Ad Hoc Reporting

AIM User Guide

This AIM User Guide is designed to familiarize users with the Ad Hoc Reporting tools available in AIM/Infinite Campus. Ad Hoc Reports (aka Filters) are essential for the verification of data and their proper use will facilitate comparisons between a district's source data and AIM.

Helpful Link:

[Student Filter Fields for Ad Hoc Reporting](#)

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FAQ:

1. What is Ad Hoc Reporting?

Ad hoc reporting is "at hand" reporting – tools that can be used for selecting specific sets of data within AIM/Infinite Campus.

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.

3. Why should I use the Ad Hoc Reporting tools in my District Edition or MT Value Added Edition?

Ad Hoc reports are essential for verifying data *between* the district's Infinite Campus data and the State Edition of AIM.

4. What can I do with Ad Hoc Reports once I create them?

Ad Hoc reports can be used for a variety of tasks, such as verifying enrollment numbers, checking program counts and generating a list of students based on a variety of criteria.

5. What are State Published Ad Hoc Reports?

The state has the ability to create Ad Hoc Filters and share them directly with districts so they can generate reports from their district data in AIM. These filters are a great starting tool for districts.

6. Can I share these Ad Hoc Reports I created with other users in my district?

Districts may share Ad Hoc reports with other users, depending upon user rights.

What are Ad Hoc Reports

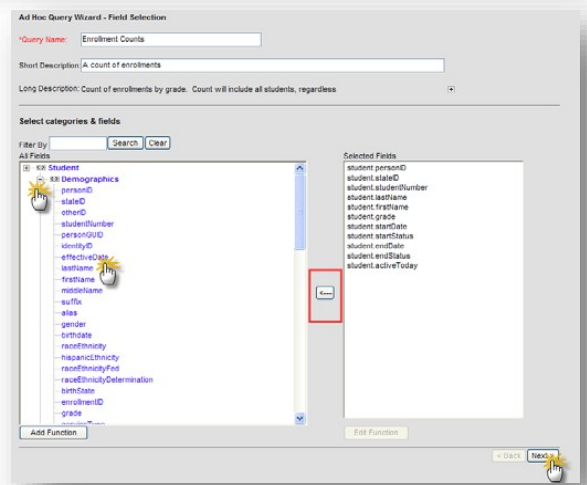
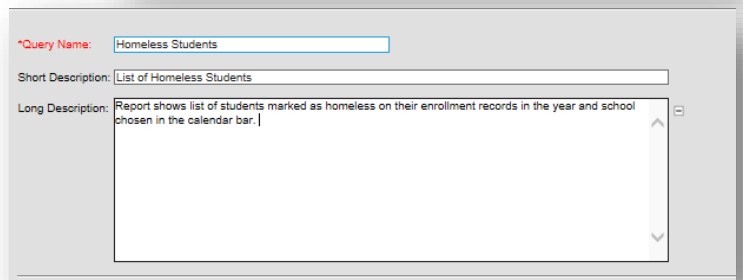
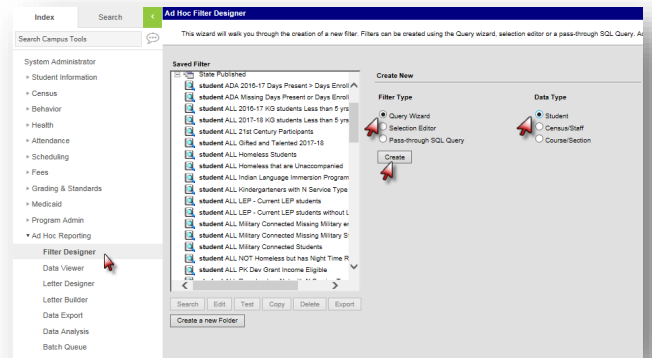
Ad Hoc is defined as: *formed or used for specific or immediate problems or needs.* Ad Hoc reporting in AIM/Infinite Campus is just that – the creating of simple reports for a specific set of data elements.

Common Ad Hoc filters can generate 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 Filters

Initial Setup

1. From the **Index** tab, select **Ad Hoc Reporting**.
2. Select **Filter Designer**.
3. Under **Create New**, select **Filter Type: Query Wizard** and **Data Type: Student**.
4. Click **Create**.
5. Give the Query a name.
6. Enter a *Short* and *Long Description* if desired. (The Long Description will display when you click on a saved report, so it may be useful to identify what the report is used for or if an existing report meets your needs.)
7. Select the categories and fields. Expand/close sections by clicking the plus (+) and minus (-) signs next to the name. If you're not sure where the field you need is located, type the field name into the **Filter by** search box.
8. Select data elements by clicking the field names. Data elements can be removed by selecting the field name from *Selected Fields* section and then clicking the back arrow between *All Fields* and *Selected Fields*.
9. Click **Next**.



Filter Parameters

Filter operators allow users to set specific parameters per field within a filter. These parameters uniquely filter each field while maintaining the filter as a whole. Some of the more commonly used filter parameters are the less than, greater than, or equal to symbols, but many other options are available. Please visit Campus Community to read more about [Managing Filters](#). Search Campus Community for more details on filtering and logical expressions. If you have yet to set up an account in Campus Community, please refer to our guide: [Creating a Campus Community Account](#).

Once you have set your filter parameters, click **Next**.

Formatting the Report

The next screen establishes the format of the report generated. Formatting is most important when printing in PDF format, or if the report is being used for a presentation as it allows you to organize your data columns as desired.

The following are elements which can be selected for formatting:

- 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.

- Seq:** 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.

- c. **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).
- d. **Column Header:** That which is entered in Column Header changes the name of that field on the export file. For example, entering a Column Header to State ID in the second line will change it from student.stateID to read **State ID** on the export file.
- e. **Alignment:** Alignment determines the justify of the column header – left, right or center.
- f. **Formatting:** Formatting is how the column will appear on the report. For example, zero padding adds zeros to a number to make it a set length.
- g. **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.
- h. 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 choose **Group Order,** *Ascending*, then choose **Aggregate/Sub Total by:** *student.state ID* and choose **Aggregate Type,** *Record Count*. Click **Save or Save & Test**.

The screenshot shows a dialog box titled "Group the data into sections that can have aggregates/sub-totals". It contains two main sections: "Grouping" and "Aggregate/Sub Total by".

Grouping: This section has a table with columns "Grouping", "Group by", and "Group Order".

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: This section has a table with columns "Aggregate/Sub Total by" and "Aggregate Type".

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

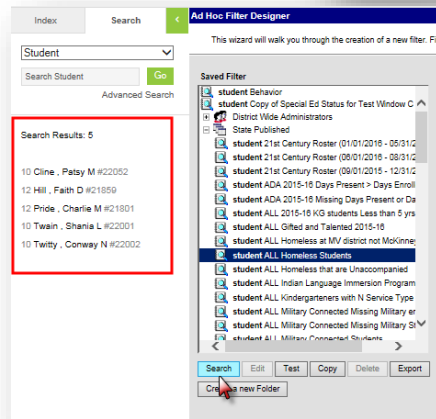
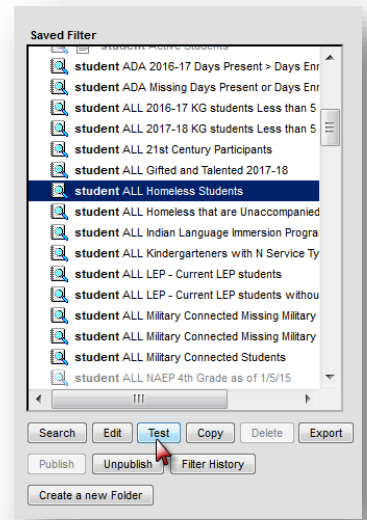
At the bottom, there are "Save To:" options: "User Account" (selected) and "User Groups". A "Folder:" dropdown is also present. At the very bottom are "Save" and "Save & Test" buttons.

Viewing Ad Hoc Reports

It is important to note that Ad Hoc filter results are determined by the *Year, School, and/or Calendar* selected from the toolbar. Reports do not have to be 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 toolbar.

To generate an ad hoc report:

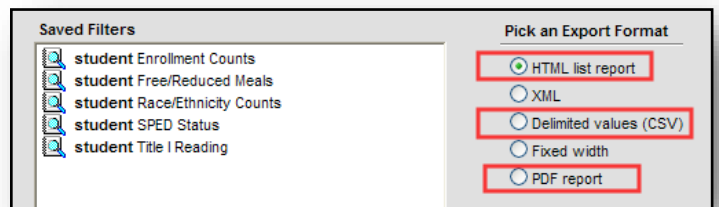
1. From the **Index** tab, expand **Ad Hoc Reporting**.
2. Select **Filter Designer**.
3. Select a Saved Filter.
4. Click the **Test** button to see the results in a pop-up HTML format.
5. You can also view results by selecting **Search**. Students names will appear to the left under **Search Results**, which allows you to then select a student from the list results generated.



Exporting Ad Hoc Reports

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

1. From the **Index** tab, select **Ad Hoc Reporting**.
2. Select **Data Export**.
3. Select a Saved Filter and select an **Export Format**. The three most common types of formats are **HTML list report**, **Delimited values (CSV)** and **PDF report**.



- a. 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).

student grade 02	student_startDate	student_personID	State ID	student_studentNumber	student_lsnName	student_gtnName
08/31/2011	02	839	34406078	3	Allen	Gary
08/31/2011	02	848	807787521	9	Bowley	Dorcas
08/31/2011	02	862	538019007	26	Evans	Sara
08/31/2011	02	868	51217076	29	Orenwood	Lee
08/31/2011	02	902	212117740	67	Judd	Wynonna
08/31/2011	02	876	78762308	39	LeDon	Chris
08/31/2011	02	879	281099487	43	McCoy	Neal
08/31/2011	02	883	149165791	45	Malap	Rosalee
08/31/2011	02	894	650667666	69	TBL	Mel
08/31/2011	02	898	765625916	62	Toome	Shana

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

1	student.startDate	student.student.p	State ID	student.s	student.l	student.f	student.g	student.e	student.e	s
2	8/31/2011	2	839	359046078	3	Allen	Gary	1		
3	8/31/2011	2	845	807787521	9	Berkeley	Diarks	1		
4	8/31/2011	2	862	536939007	26	Evans	Sara	1		
5	8/31/2011	2	885	512717078	29	Greenwood	Lee	1		
6	8/31/2011	2	903	212117740	67	Judd	Wynonna	1		
7	8/31/2011	2	875	787682308	39	LeDoux	Chris	1		
8	8/31/2011	2	879	281099467	43	McCoy	Neal	1		
9	8/31/2011	2	881	149165791	45	Milap	Ronnie	1		
10	8/31/2011	2	895	650867586	59	Tillis	Mel	1		
11	8/31/2011	2	896	765622916	62	Twain	Shania	1		
12	8/31/2011	2	906	240183925	70	Brown	Zac	2		
13	8/31/2011	2	855	520296697	19	Cash	Roseanne	2		
14	8/31/2011	2	868	726113477	32	Hill	Faith	2		
15	8/31/2011	2	877	180735107	41	Lynn	Loretta	2		
16	8/31/2011	2	884	406454610	48	Nelson	Willie	2		
17	8/31/2011	2	886	119459608	50	Paisley	Brad	2		
18	8/31/2011	2	841	878671361	7	Perry	Neil	2		

- c. 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.

11-12
Cascade School
131 Central Ave N, Cascade, MT 59401
Created on 08/02/2011 09:12:49 AM Page 1 of 3

Enrollment Count
Print Field List
Total Rows

All Records

student.grade 01

startDate	startStatus	personID	State ID	studentNumber	lastName	firstName	grade
08/31/2011	02	839	359046078	3	Allen	Gary	01
08/31/2011	02	845	807787521	9	Berkeley	Diarks	01
08/31/2011	02	862	536939007	26	Evans	Sara	01
08/31/2011	02	885	512717078	29	Greenwood	Lee	01
08/31/2011	02	903	212117740	67	Judd	Wynonna	01
08/31/2011	02	875	787682308	39	LeDoux	Chris	01
08/31/2011	02	879	281099467	43	McCoy	Neal	01
08/31/2011	02	881	149165791	45	Milap	Ronnie	01
08/31/2011	02	895	650867586	59	Tillis	Mel	01
08/31/2011	02	896	765622916	62	Twain	Shania	01

student.grade 01 Records: 10

student.grade 02

Using Ad Hoc Filters with Search Tools

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

1. Click the **Search** tab.
2. Select **Student** from the menu box.
3. Click **Advanced Search**.
4. Select a filter from **Saved Filters**.
5. Select from any of the fields listed under Student Search, such as Grade. Click the **Search** button directly under the list of search criteria fields. The results appear as *Search Results* on the left.

Index Search

Student

Search Student Go

Advanced Search

Search Results: 3

- 10 Cline, Patsy M #22052 [10/14/2001]
- 10 Twain, Shania L #22001 [03/01/2001]
- 10 Twitty, Conney N #22002 [03/07/2001]

Student Search

Last Name
First Name
Student Number
SSN
Grade
Birth Date
Gender
StateID
Person ID
Locker Number
Special Ed
Status
Setting
Disability
Counselor

Students that you are Counseling
Effective Date: 02/28/2018
Search

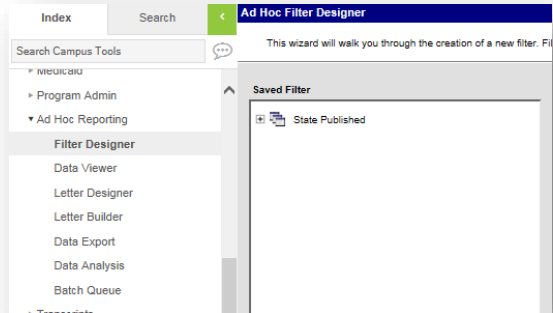
Saved Filter

- Behavior
- Copy of Special Ed Status for Test Window C
- District Wide Administrators
- State Published
- 21st Century Roster (01/01/2016 - 05/31/2016)
- 21st Century Roster (06/01/2016 - 09/31/2016)
- 21st Century Roster (09/01/2016 - 12/31/2016)
- ADA 2015-16 Days Present > Days Enrolled or >1
- ALL 2015-16 I/G students Less than 5 yrs. old
- ALL Gifted and Talented 2015-16
- ALL Homeless at MV district not McKinney/Vento
- ALL Homeless Students
- ALL Homeless that are Unaccompanied
- ALL Indian Language Immersion Program Student
- ALL Kindergartners with N Service Type
- ALL Military Connected Missing Military entry/exit
- ALL Military Connected Missing Military Status
- All 11 Military Connected Students

State Published Filters

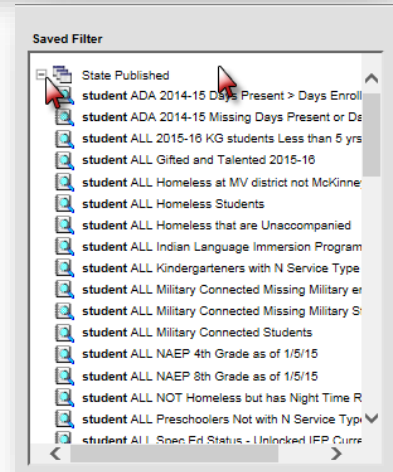
The OPI AIM Staff publishes ad hoc filters specific to collections. Districts may opt to use these filters or copy and modify them for their own reporting purposes.

State Published filters appear under their own folder under **Saved Filter**.



Click on the plus sign next to **State Published** to expand the list. For further details about using these filters, please refer to the AIM User Guide [State Published Ad Hoc Reports](#).

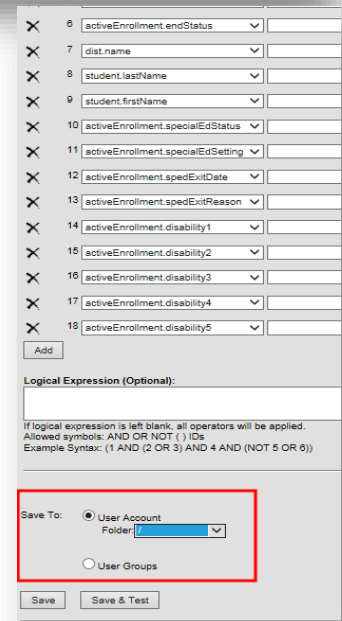
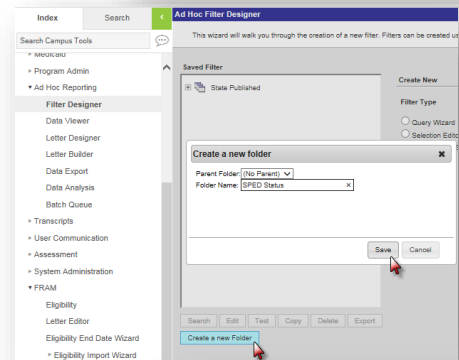
NOTE: Users must have access to MTE_All_tools or the district must modify the *Ad Hoc Reporting* User Group to have access to State Published Filters.



Organizing Ad Hoc Filters

Ad Hoc filters can be organized into folders and shared with other users and/or groups. Folders are created so that similar filters may be stored together.

1. From the **Index** tab, select **Ad Hoc Reporting**.
2. Select **Filter Designer**.
3. Click **Create New Folder**. Folders can be independent (*No Parent*) or connected to other folders (select *Parent Folder* and enter *Folder Name*).
4. Click **Save**.
5. 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**.
6. 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.

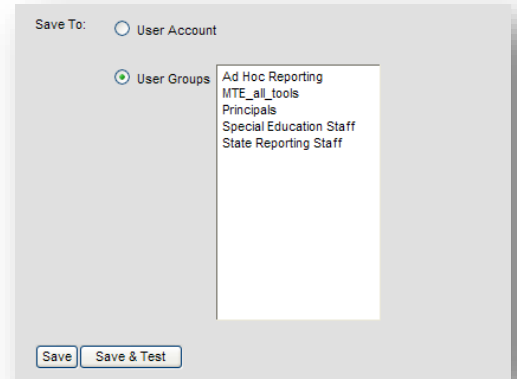


Sharing Ad Hoc Filters

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 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.*

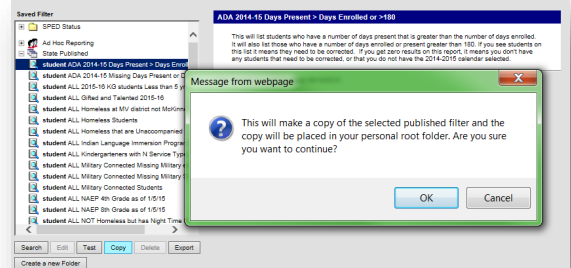
1. From the **Index** tab, select **Ad Hoc Reporting**.
2. Select **Filter Designer**.
3. Select a **Saved Filter** and click **Edit**.
4. Click **Next**.
5. Under **Save To:** choose **User Groups**.
6. Select the user group(s) to share the filter with.
7. Click **Save**.



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 original filter.

1. From the **Index** tab, select **Ad Hoc Reporting**.
2. Select **Filter Designer**.
3. Select a **Saved Filter**.
4. Click **Copy**.
5. Click **OK**. A copy of the filter will be saved to your personal root folder.



For more information, contact the AIM Help Desk at 1- 877-464-6681 or [Submit an AIM Help Desk Ticket](#)