

InformationNOW – Filters

Overview

A *filter* may be described as a set of criteria that is used to create a subset of students or staff for whom reports or searches may be generated.

Student Filters

To access student filters, go to **Students | Student Filter**. A list of existing filters will display including the filter name, user who created the filter, and the date it was built.

Note: When a filter is used to generate reports or searches, the program will pull the latest list of students who meet the criteria. For example, if a filter for 10th grade students is created, whenever it is used, the latest list of 10th grade students will be pulled. There is no need to rebuild filters once they are created.

Add a Filter

To create a new filter, click **Add** and enter information as described on the following page.

Note: These filter options are “and” options. For example: If a Grade Level of *10* is selected and an Ethnicity of *Hispanic* is selected, all 10th grade Hispanic students will be included in the filter.

Add Student Filter

*Filter Name: Active Public Filter Private Filter

Description:

Copy From Filter:

Main Custom User Defined

First Name: Last Name: Social Security Number:

Student Number: Guardian First Name: Guardian Last Name:

Gender: Ethnicity(ies): Nationality:

Female
Male

Black
Hispanic
Multi-Racial
White

Afghanistan
Åland Islands
Albania

Current School Program: Current Lunch Code: Current Transport Code:

21st Century Charter School
Band
Beta

Free
Full Pay
Reduced

Handicapped Bus
Hazardous Transport
Regular Transport

Enrollment Status: Residency Status: Special Education Status:

Currently Enrolled
Never Enrolled
Withdrawn
Registered

Deseg In
DesegOUT
Federal Lands

Active
Inactive
Not Eligible

Enrollment Code: Course: Homeroom:

Death
Dropped Out
Expulsion

10a
10B
10c

Min Grade Level: Max Grade Level: Grade Level Go Green

9 10

Filter Testing

Academic Sessions Year:

2010

Academic Sessions:

Hometown Elementary - Regular 2009-2010
Hometown High School - 2009-2010

- **Filter Name:** Enter a meaningful and unique description for this filter. Ex.: *Free Lunch students*. The filter name is limited to 50 characters.
- **Active:** This is used to denote whether the filter is active or inactive. Once a filter is set inactive by unchecking the box, it will not be available to use for generating reports or executing searches.
- **Public Filter:** Public filters may be viewed and/or edited by any user with the appropriate privileges.
- **Private Filter:** Private filters will be seen only by the user who created the filter.
- **Description:** Optional. Enter a brief description of the filter.
- **Copy From Filter:** This option allows users to create a stored filter based on the students who are listed in the user's current working filter, or from an existing filter of students. If the user selects an existing filter from which to build this new filter, any criteria that have been set up on the existing filter selected will be copied to this new filter.

Main Tab

One or more of the following criteria may be specified in a Student Filter:

Note: Search criteria are not case-sensitive.

- **First Name:** Enter the full or partial first name of the student(s) to be included in the filter. For a list of students whose first names begin with the letter *A*, enter an *A* in this field.
- **Last Name:** Enter the full or partial last name of the student(s) to be included in the filter. For a list of students whose last names begin with the letters *An*, enter *An* in this field.
- **Social Security Number:** Enter the Social Security Number of the student(s) to be included in this filter. It is not necessary to use the format of *xxx-xx-xxxx*. Enter the 9 digits and the number will be auto-formatted to standard SSN format when the filter is created.
- **Student Number:** Enter the auto-generated number of the student to be included in the filter (ex.: *S1001* or *S1094*).
- **Guardian First Name:** Enter the full or partial first name of the guardian to be included in the filter. A guardian is a contact attached to a student record who has been checked as *Is Custodian*. All students with a guardian whose first name matches the criteria entered here will be included in the filter.
- **Guardian Last Name:** Enter the full or partial last name of the guardian to be included in the filter. A guardian is a contact attached to a student record who has been check as “is custodian”. All students with a guardian whose last name matches the criteria entered here will be included in the filter.

Multi-Select Fields

Note: The following fields are optional multi-select fields. Use *Ctrl+click* or *Shift+click* to select multiple values to be included in the filter. For example, to build a filter of all students with a lunch code other than *Full Pay*, *Ctrl+click* to select all other lunch codes other than *Full Pay*.

If no value is selected in any of the following fields, all students will be included regardless of their value. For example, if no ethnicity is selected, all matching students will be included in the filter regardless of their ethnicity.

- **Gender:** To filter on gender, select the gender of the student(s) to be included in the filter.
- **Ethnicity:** To filter on ethnicity, select the ethnicity of the student(s) to be included in the filter.

Note: Filters based on ethnicity pull from the ethnicity code displayed on the student’s *Main* tab and also from additional ethnicities which may be assigned to students by using the **More** link.

- **Nationality:** To filter on nationality, select the nationality of the student(s) to be included in the filter.
- **Current School Program:** To filter on school program, select the School Program into which students have been added. Students may be added to groups under **Students | Student Maintenance**. Open a student record and click **School Programs** under the *Manage* menu option.
- **Current Lunch Code:** To filter on current lunch code, select the lunch code of the student(s) to be included in the filter.

Note: Filters based on lunch codes draw data from the lunch code displayed on the student's *Main* tab. It is not based on the historical lunch status. Therefore, if a filter is created for free lunch students and a student was changed from free lunch to full pay as of May 14th, that student will not be included on a report that is generated on May 15th using the free lunch filter because the student is no longer considered a free lunch student.

- **Current Transport Code**: To filter on transportation code, select the transportation code of the student(s) to be included in the filter.

Note: Filters based on transportation codes pull from the transportation code displayed on the student's *School* tab. It is not based on the historical transportation status. Therefore, if a filter is created for regular transported students and a student was changed from regular transported to non-transported on May 14th, that student will not be included on a report that is generated on May 15th using the regular transported filter because the student is no longer considered regular transported.

- **Enrollment Status**: To filter based on student's enrollment status, select *Currently Enrolled*, *Never Enrolled*, *Withdrawn* or *Registered*.
- **Residency Status**: To filter on residency status, select one or more of the residency statuses of the student(s) to be included in the filter.
- **Special Education Status**: To filter on special education status, select one or more of the statuses of the student(s) to be included in the filter.
- **Enrollment Code**: To create a filter of students who were either enrolled or withdrawn for a specific reason, select one or more of the reason(s) to be included in the filter.
- **Course**: To create a filter of students who are enrolled in a course, enter the course number (ex.: *101*). The section number may also be entered to create a filter of students in one specific section of a course. To filter to a section, enter the course and section number, separated by a period.
- **Homeroom**: To create a filter of students who are currently enrolled in a homeroom, select one or more of the homeroom(s) to be included in the filter.
- **Grade Level**: Check to enable the *Min Grade Level* and *Max Grade Level* fields.
 - **Min Grade Level**: The minimum grade level of the students to be included.
 - **Max Grade Level**: The maximum grade level of the students to be included.
- **Go Green**: Check to create a filter for students who have the *Go Green* option selected on their *Misc* tab.
- **Filter Testing**:
 - **Academic Sessions Year**: Select the year from the available list. Filters are academic session-specific. For example, if the user creates a homeroom filter for academic session 2010, the students listed will be those who were in the selected homeroom during the 2010 academic session.
 - **Academic Sessions**: Student filters are limited by school. If the user has permission to access more than one school, select the desired school to be tested from the available list.

Custom Tab

The student's custom tab contains state, district and school specific data elements. These fields may be used to create filters.

Field Name	Field Value	Field Name	Field Value
Entered Date	MM/dd/yyyy	ELL Placement	
Years in Program		ELL Services	MM/dd/yyyy
Year Exited Program		ELL Services Ended	MM/dd/yyyy
Enrolled School		Reason ELL Ended	
Enrolled District		ELL Periods Per Week	
Serving School		Title III Status	
Serving School FTE		Immigrant Ed Program	
IEP Acc		ELL CAT	
504 Acc		Dev Bilingual Ed	
MergeOrInvIndicator		Dual Language	
Serving School FTE 2		Hert Lang Prog	

- **Date:** Dates should be entered as *mm/dd/yyyy*. Alternately, the user may click the ellipsis button to select the date from the calendar.
- **List:** To search for an item in a list field, click the drop-down arrow and select it from the list.
- **Yes/No:** To select a value in a *Yes/No* field, click the drop-down arrow and select it from the list.

User Defined Tab

This tab allows users to define a static or fixed list of student to include in a filter. Selected students will be included in the filter unless manually deleted regardless of other filter criteria that may be applied to the filter such as grade levels.

To add a student, perform the following steps:

1. Click **Add** on the *User Defined* tab.
2. Enter search criteria to filter the list of students.
3. Click **Search**.
4. Place a check next to the student(s) to be added to the filter.
5. Click **Include**.
6. Continue adding students as desired. Click **Close** when finished.

Test/Create

Once the criteria are entered, use one of the following options:

- Click **Test** to view the list of students to be included in the filter. Click **Close** to return to the filter add screen.

Note: The list includes the student's file number, name, grade level, date of birth and gender.

- Click the **Create** button to save the filter.
- Click the **Cancel** button to cancel the operation and close the filter add screen.

Edit a Filter

To view/edit a student filter, go to **Students | Student Filter**. Then do one of the following:

- Click the filter name, which is a link, under the *Name* column in the *Student Filter List* screen; or
- Check the checkbox(es) in one or more rows and click the **View** button in the *Student Filter List* screen.

Either of these two options will open the edit screen.

For a description of the fields, see the section “Add a Filter” on page 1.

Delete a Filter

To delete a student filter, go to **Students | Student Filter**. Place a check next to the name of the filter to be deleted. Click **Delete**.

Staff Filters

To access staff filters, go to **Staff | Staff Filter**.

A list of existing filters will display including the filter name, description and accessibility (public or private).

Note: When a filter is used to generate reports or searches, the program will pull the latest list of staff members who meet the criteria. For example, if a filter for high school teachers is created, whenever it is used, the latest list of high school teachers will be pulled. There is no need to rebuild filters once they have been created.

Add a Filter

To create a new filter, click **Add** and enter criteria as described below.

Add Staff Filter

*Filter Name: Active Public Filter Private Filter

Description:

Copy From Filter:

Main **Custom**

First Name: Last Name:

Phone: Zip Code:

Primary Classification: Secondary Classification: Tenured:

Gender: Ethnicity: School Name:

Female
Male

American Indian
Asian
Black

Hometown Elementary
Hometown High School

Degree:

Bachelor
Master
PhD

Test Create Cancel

A filter may be created based on the following criteria options. These options are “and” options. For example: If a gender of male is selected and an ethnicity of Hispanic is selected, all male Hispanic staff will be included in the filter.

- **Filter Name:** Enter a meaningful and unique description for this filter (ex.: *High School Staff*). The filter name is limited to 50 characters.
- **Active:** This is used to denote whether the filter is active or inactive. Once a filter is set inactive by unchecking the box, it will not be available to use for generating reports or executing searches.
- **Public Filter:** Public filters may be viewed and/or edited by any user with the appropriate privileges.
- **Private Filter:** Private filters will be seen only by the user who created the filter.
- **Description:** Optional. Enter a brief description of the filter.
- **Copy From Filter:** This option allows users to create a stored filter based on the staff who are listed in the user’s current working filter, or from an existing filter of staff. If the user selects an existing filter from which to build this new filter, any criteria that have been set up on the existing filter selected will be copied to this new filter.

Main Tab

One or more of the following criteria may be specified in a Staff Filter:

Note: Search criteria are not case-sensitive.

- **First Name:** To create a filter of staff member(s) based on the first name, enter the full or partial first name of the staff member(s) to be included. For a list of staff members whose first names begin with the letter *A*, enter an *A* in this field.
- **Last Name:** To create a filter of staff member(s) based on last name, enter the full or partial last name of the staff member(s) to be included. For a list of staff members whose last names begin with the letters *An*, enter *An* in this field.
- **Phone Number:** To create a filter of staff member(s) based on phone, enter the criteria. The phone number must be entered in *xxx-xxx-xxxx* format or *(xxx) xxx-xxxx* format.
- **Zip Code:** To create a filter for staff member(s) with a specific ZIP Code, enter it here.
- **Primary Classification:** To create a filter based on primary classification, select the primary classification of the staff member(s) to be included. Primary classifications are attached to staff records on the *Class* tab. When a classification is assigned to a teacher, be sure to mark if it is considered the primary classification.
- **Secondary Classification:** To create a filter based on secondary classification, select the secondary classification of the staff member(s) to be included. Secondary classifications are attached to staff records on the *Class* tab.
- **Tenured:** To create a filter of just those teachers who are marked as tenured or not, select the appropriate code.

Multi-Select Fields

Note: The following fields are optional multi-select fields. Use *Ctrl*+click or *Shift*+click to select multiple values to be included in the filter. For example, to build a filter of all staff members with a degree other than PhD, *Ctrl*+click to select all other degrees other than *PhD*.

If no value is selected in any of the following fields, all staff will be included regardless of their value. For example, if no ethnicity is selected, all matching staff will be included in the filter, regardless of their ethnicity.

- **Gender:** Select the gender of staff to be included in the filter. If no gender is selected, all genders will be included.
- **Ethnicity:** To create a filter of staff with a specific ethnicity, select it here.

Note: Filters based on ethnicity pull from the ethnicity code displayed on the staff's *Main* tab but not from the additional ethnicities which may be assigned to staff by using the **More** link.

- **School Name:** To create a filter of staff for just one school, select the school from the list.
- **Degree:** To create a filter based on types of degrees earned by staff members, select the degree from the list.

Once the criteria are entered, use one of the following options:

- Click **Test** to view the list of staff to be included in the filter. Click **Close** to return to the filter add screen.

Note: The list includes the staff's file number, name, gender, phone, primary classification and primary school.

- Click the **Create** button to save the filter.
- Click the **Cancel** button to cancel the operation and dismiss the filter add screen.

Custom Tab

The staff's *Custom* tab contains state, district and school specific data elements. These fields may be used to create filters.

- **Date:** Dates should be entered as *mm/dd/yyyy*. Alternately, the user may click the ellipsis button to select the date from the calendar.
- **List:** To search for an item in a list field, click the drop-down arrow and select it from the list.
- **Yes/No:** To select a value for a *Yes/No* field, click the drop-down arrow and select it from the list.

Test/Create

Once the criteria are entered, use one of the following options:

- Click **Test** to view the list of students to be included in the filter. Click **Close** to return to the filter add screen.

Note: The list includes the student's file number, name, grade level, date of birth and gender.

- Click the **Create** button to save the filter.
- Click the **Cancel** button to stop the operation and close the filter add screen.

Edit a Filter

To view/edit a staff filter, go to **Staff | Staff Filter**. Then do one of the following:

- Click the filter name, which is a link, under the *Name* column in the *Staff Filter List* screen; or
- Check the checkbox(es) in one or more rows and click the **View** button in the *Staff Filter List* screen.

Either of these two options will open the edit screen.

Delete a Filter

To delete a staff filter, go to **Staff | Staff Filter**. Place a check next to the name of the filter to be deleted and then click **Delete**.

Working Filter

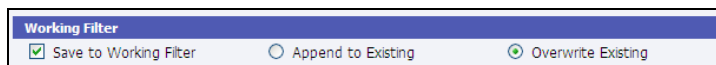
A *working filter* is a user-specific tool which allows students or staff from a report to be saved for use in additional functions. For example, when generating the Honor Roll report, users may select to save the students from the report to the working filter. This working filter may then be used to generate mailing labels to use for sending bumper stickers.

- Working filters are available when reports are generated and when the student and staff search screens are used.
- Each *InformationNOW* unique user login will have a unique working filter for both students and staff.

Adding Students to Student Working Filter

Students may be added to a *student working filter* when reports are generated. The following example is for generating the Honor Roll report and saving the students to print mailing labels.

- Go to **Reports | Honor Roll** or **Grades | Reports | Honor Roll**.
- Select the *Criteria* and *Include* options as normal.
- Under the *Working Filter* section, check to *Save To Working Filter*.



The screenshot shows a section titled "Working Filter" with three radio button options: "Save to Working Filter" (checked), "Append to Existing", and "Overwrite Existing".

- **Append To Existing:** Bullet to add the students from the Honor Roll report to the existing list of students in the working filter.
- **Overwrite Existing:** Bullet to clear the working filter of all students before adding students from the Honor Roll report to the working filter.
- Click **Preview**. The students who printed on the Honor Roll report will be saved to the working filter.
- Go to **Reports | Student Labels** or **Students | Reports | Student Labels**.
- Select the *Criteria* options as normal.

- Under the *Student Filter* option, select *My Working Filter*.

The screenshot shows a dialog box titled "Student Labels". Under the "Criteria" section, the "Student Filter" dropdown menu is open, and "[My Working Filter]" is selected, indicated by a red arrow. Other options in the dialog include "To the Guardian of:", "Name Format:", "*Order By:", and "Format:". There are "Preview" and "Close" buttons at the bottom right.

- Click **Preview**.

Labels will be printed for the students who were on the Honor Roll report and who were saved to the working filter.

Adding Staff To Staff Working Filter

Staff may be added to a *staff working filter* when reports are generated. The following example is for resolving classes that currently do not have teachers assigned. Users may generate a Free Teacher report to view which teachers are free, by period. Then the user would print the Master Schedule List report for only these teachers and use the Master Schedule List to see which classes the teachers are already teaching, in order to decide who might be able to take on an additional class.

- Go to **Reports | Free Teacher** or **Scheduling | Reports | Free Teacher**.
- Select the *Criteria* and *Include* options as normal.
- Under the *Working Filter* section, check to *Save To Working Filter*.

The screenshot shows a dialog box titled "Working Filter". It contains three radio button options: "Save to Working Filter" (which is checked), "Append to Existing", and "Overwrite Existing".

- **Append To Existing:** Bullet to add the staff from the Free Teacher report to the existing list of staff in the working filter.
- **Overwrite Existing:** Bullet to clear the working filter of all staff before adding staff from the Free Teacher report to the working filter.
- Click **Preview**. The staff members who printed on the Free Teacher report will be saved to the working filter.
- Go to **Reports | Master Schedule List** or **Scheduling | Reports | Master Schedule List**.
- Select the *Criteria* options as normal.
- Under the *Staff Filter* option, select *My Working Filter*.

Master Schedule List

Criteria

Staff Filter:

[My Working Filter] **High School Teachers**
 Jones Filter

End Full Section Number: End Section Short Name: End Period:

Start Grade: End Grade: Section Name To Display:

Course Types: Terms: *Order By:

--- All ---
 Business
 Computers
 Drivers Ed
 Electives
 English

--- All ---
 Term 1
 Term 2

Include

Withdrawn Students GPA Credit Additional Teachers
 GPA Method Alternate Course Numbers

Working Filter

Save to Working Filter Append to Existing Overwrite Existing

Format: HTML Save as Default

- Under the *Order By* option, select *Teacher*.
- Click **Preview**.

The list of classes currently taught by teachers who have free periods will display. Use the Free Teacher and Master Schedule List report to determine which teachers are available to teach the course.