



GENESIS[™] QUERY

Query

CREATING A MATRIX

Any User can develop a query using the Genesis Student View, in Find Mode. (Find Mode is indicated by a yellow background in all data fields and can be reset using the 'magnifying glass' icon):

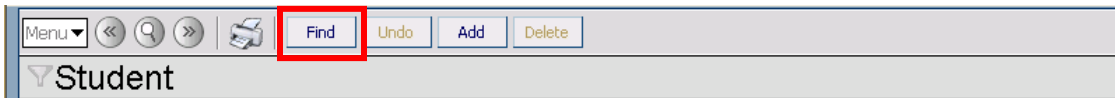
The screenshot shows the Genesis Student View interface. The top navigation bar includes a 'Quick Launch' search box and a magnifying glass icon circled in red. The main content area is titled 'Student' and features several tabs: Demographics, Parent/Guardian, Other Info, Emergency, Enrollment, Enrollment History, Classes, Documents, and Stud. The Demographics tab is selected, displaying fields for Last Name, First Name, Middle Name, Suffix, Perm ID, Grade, and Gender. Below this are sections for Student Information (Home Language, Nick Name, Last Name Goes By, SAIS ID, Birth Date, Birth Place, Birth Verification, Birth Certificate N, Birth State, Birth Country, Email) and Race and Ethnicity (Hispanic/Latino, Resolved Race/Ethnicity). A magnifying glass icon is highlighted in the top navigation bar, indicating Find Mode.

Type an asterisk (*) into any field that you want to include in your query. For this example, we will want the Home Language, Birth Date, and Resolved Race/Ethnicity, although any field could be used, and fields can be chosen from the other tabs (Other Info, Emergency, etc). (**NOTE:** Student's First, Middle and Last Names and Student Number will be included by default in all Student Queries, so it is not necessary to mark any of these fields):

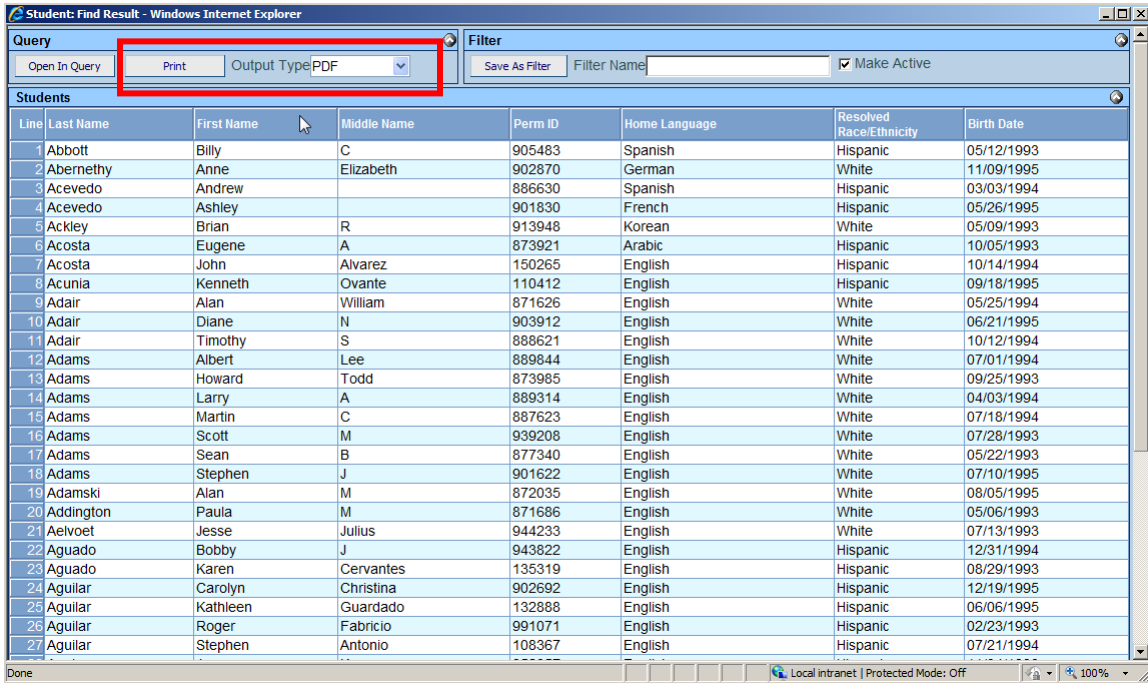
The screenshot shows the same Genesis Student View interface as the previous one. In this view, red boxes highlight the asterisks (*) entered in the Home Language, Birth Date, and Resolved Race/Ethnicity fields, indicating they are selected for the query.

Query

Click Find:

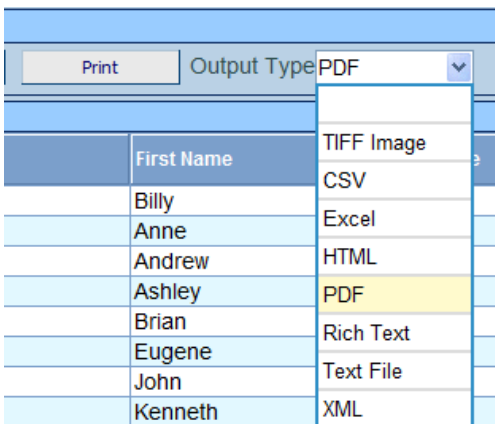


A list displays that includes the selected fields with data. Click drop down arrow for Output Type



OUTPUT TYPES

Output Types include TIFF Image (Picture of the first page), CSV (Comma Separated Value used by some 3rd party programs), Excel (Takes the information directly into Excel format), HTML (same as the list presented above), PDF (Opens in Acrobat Reader or any PDF reader), Rich Text (Opens in Word), Text File (Tab separated fields used by some 3rd party programs), XML (programming syntax).



Query

USING SYSTEM FILTERS

System filters are used to limit the data viewed on a screen. A single user can keep up to ten system filters at a time in the filter drop down. More than one filter can be active as long as they do not conflict, such as a student cannot be in two grades at the same time or they cannot be a male and a female at the same time in the system.

Save As Filter

System Filters are created from the Matrix view using the Save As Filter button. Enter the Filter Name. Check the Make Active box (this is the default) to enable the filter immediately upon Save. If the Make Active box is unchecked the filter is still saved however the filter is not active.

Line	Last Name	First Name	Middle Name	Perm ID	Grade
1	Abermethy	Anne	Elizabeth	902870	10
2	Acevedo	Ashley		901830	10
3	Acunia	Kenneth	Ovante	110412	10
4	Adair	Diane	N	903912	10
5	Adams	Stephen	J	901622	10
6	Adamski	Alan	M	872035	10
7	Aguado	Bobby	J	943822	10
8	Aguilar	Carolyn	Christina	902692	10
9	Aguilar	Kathleen	Guardado	132888	10
10	Ahlistrom	Linda	Kae	120451	10
11	Aitchison	Karen	L	902998	10
12	Akin	Andrea	Ellen	902875	10
13	Akpan	Tina	Nyong	165110	10
14	Alarcon	Frank		886651	10
15	Alcazar	Eugene		141666	10
16	Alcazar	Eugene	A	141517	10
17	Alder	Brenda	I	967569	10
18	Alexander	Joseph	J	901626	10
19	Alger	Phyllis	Amber	149884	10
20	Allen	Aaron	Lee	992938	10
21	Allen	Andrea		904134	10
22	Allen	Diane	B	901507	10

The Filter Icon shows in full color when there is an active filter running. (**NOTE:** All functions performed while the filter is active will only include those students that are part of the active filter.)

Menu << >> Find Undo Add Delete

Student

Student Name: School: Homeroom: Teacher:

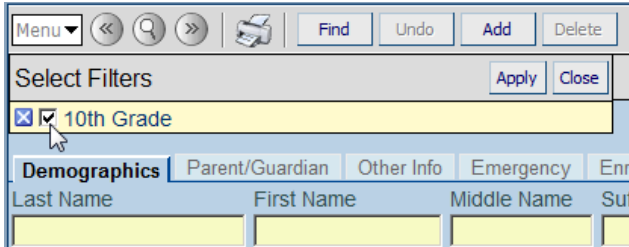
Demographics Parent/Guardian Other Info Emergency Enrollment E

Last Name First Name Middle Name Suffix Perm

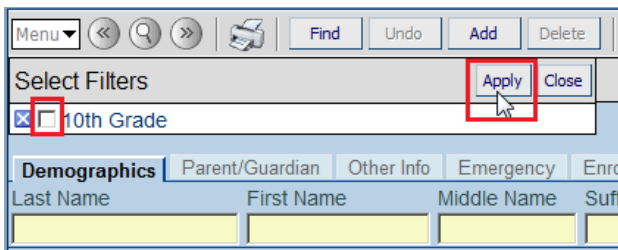
Query

Inactivating Filters

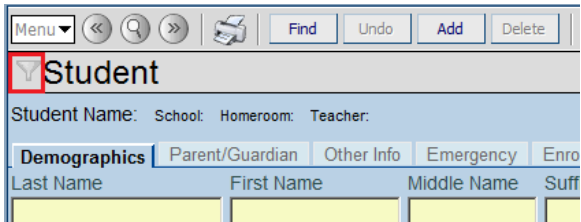
To inactivate the filter click Filter Icon to show Select Filters list. Click checkbox to deselect the active filter. **(NOTE: Filter must be inactivated PRIOR to deletion otherwise the filter will continue to be active even though it does not show on the list and the filter icon is grayed out.)**



Click Apply button after deselecting check box.

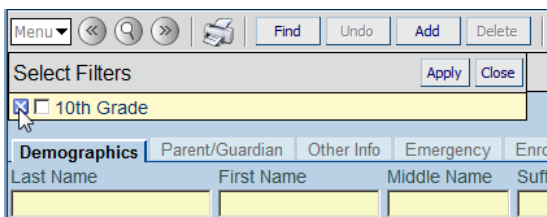


Filter Icon grays out to show no active filter.



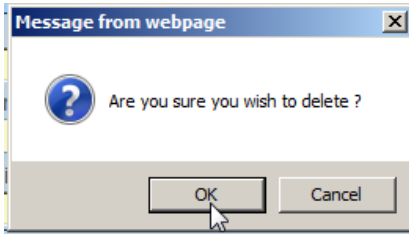
Deleting Inactive Filters

Click "X" to delete the filter

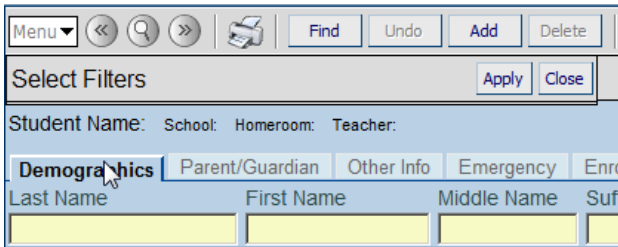


Query

Click "OK" in the message box to confirm delete



Notice the filter list does not contain the deleted filter.



Query

MATRIX DATA IN QUERY

Click Open in Query:

Line	Last Name	First Name	Middle Name	Perm ID	Home Language	Resolved Race/Ethnicity	Birth Date
1	Aaron	Harold	Nicholas	968257	English	White	07/13/1994
2	Aaron	Ian		129442	English	Hispanic	04/14/2000
3	Aaron	Susan		41	English	White	05/06/2004
4	Aaron	Theresa		126855	Spanish	White	02/13/2003
5	Abarca Salazar	Carol	Dejesus	163051	English	Hispanic	12/25/2004
6	Abbott	Andrew	Edward	124013	English	White	02/07/1996
7	Abbott	Billy	C	905483	Spanish	Hispanic	05/13/1992
8	Abbott	Bobby	Christian	169523	English	White	01/30/1994
9	Abbott	Susan	Cecelia	158247	English	White	07/04/1994
10	Abdulbari	Kathy	Abdusemie	135578	German	American Indian	11/08/2002
11	Abdurahman	Eugene		943994	English	Asian - Chinese	05/31/1994
12	Abel	Albert	Ryan	132683	English	White	05/04/1993
13	Abernathy	Bruce	Vanlee	879138	English	Hispanic	08/06/1992
14	Abernathy	Diana	Lynn	993907	English	White	05/24/2001
15	Abernathy	Donna	A	903727	English	White	04/24/1994
16	Abernathy	Justin	M	932364	English	White	02/09/1997
17	Abernathy	Teresa	M	961370	English	White	04/01/1998
18	Abernathy	Anne	Elizabeth	902870	German	White	11/10/1994

The Query View launches with the selected fields displayed in the grid.

The screenshot shows the 'Query' window with the 'Columns' tab selected. The 'Step 3. Provide any desired property overrides' dialog box is open, showing a table with columns: Line, Name, Label Override, Order, Width, Hide, Group, Break, and Display. The dialog box is highlighted with a red box.

Line	Name	Label Override	Order	Width	Hide	Group	Break	Display
1	Last Name (Student)				<input type="checkbox"/>			Default
2	First Name (Student)		1		<input type="checkbox"/>			Default
3	Middle Name (Student)		2		<input type="checkbox"/>			Default
4	Perm ID (Student)		3		<input type="checkbox"/>			Default
5	Home Language (Student)		4		<input type="checkbox"/>			Default

At this point you can name and print the query in any of the output types discussed previously.

To name the query enter the title in the Name field at the top. (**NOTE:** Name entered here prints out on PDF and Rich Text output.)

The screenshot shows the 'Query' window with the 'Name' field highlighted with a red box. The 'Name' field contains the text 'Example Student List'. The 'Output Type' is set to 'HTML' and the 'Orientation' is set to 'Portrait'.

Query

Select output type from drop down.

The screenshot shows the 'Query' configuration window. At the top, there are buttons for 'Save', 'Open', 'Execute', 'Delete', 'Clear All', and 'Save as Report'. Below these is the 'Query' title and a section titled 'Start Here! Enter the details about your query:'. This section contains fields for 'Name' (Example Student List), 'Group', 'Type' (Select), 'Output Type' (HTML), 'Orientation' (Portrait), and 'Type' (New). The 'Output Type' dropdown menu is open, showing options: TIFF Image, CSV, Excel, HTML (highlighted), PDF, Rich Text, Text File, and XML. Below this is a 'Description' field and a 'Columns' tab. The main area is titled 'Step 1. Select the Business Objects' and contains a table with columns 'Line' and 'Name'. The table lists several objects, including 'CALPADSSynStudents (K12.CA.CALPADS)', 'Course (K12.CourseInfo)', 'Dwelling (K12.Census)', 'Family (K12.Census)', 'GBDistrictMassSync (K12.GradebookInfo)', and 'Parent (K12.ParentGuardianIn...)'. A 'Step 2' button is visible on the right.

If needed, change output orientation by selecting orientation from drop down.

This screenshot is similar to the previous one, but the 'Orientation' dropdown menu is open, showing options: Label, Landscape, and Portrait. The 'Output Type' dropdown is now closed and set to 'HTML'. The 'Objects' section on the right shows a tree view with 'Student' selected.

Click Execute to run the query.

This screenshot shows the 'Query' configuration window with the 'Execute' button highlighted by a red box. The 'Name' field is empty, and the 'Type' is 'Select'. The 'Output Type' is 'HTML', 'Orientation' is 'Portrait', and 'Type' is 'New'. The 'Description' field is empty. The 'Columns' tab is selected. The main area is titled 'Step 1. Select the Business Objects' and contains a table with columns 'Line' and 'Name'. The table lists several objects, including 'Course (K12.CourseInfo)', 'GBDistrictMassSync (K12.GradebookInfo)', 'JTEDAttendanceExtract (K12.AZ.AttendanceInf...)', 'Parent (K12.ParentGuardianIn...)', 'PXPEmailAttendanceCodeList (K12.PXP)', and 'SchedMeetingDav (K12.ScheduleInfo Mas...'. An 'Objects' section on the right shows a tree view with 'Student' selected. A 'Step 2. Select the Properties' section is also visible on the right.

Query

Modifying Query Output

There are several different ways to modify query output. Override column headings, hide columns, re-order columns, and adjust column width just to name a few.

Override Column Headings

Using the Label Override column, the name that displays from GENESIS can be overridden with a different name.

Step 3. Provide any desired property overrides								
Line	Name	Label Override	Order	Width	Hide	Group	Break	Display
1	Last Name (Student)				<input type="checkbox"/>			Default
2	First Name (Student)		1		<input type="checkbox"/>			Default
3	Middle Name (Student)		2		<input type="checkbox"/>			Default
4	Perm ID (Student)	STU#	3		<input type="checkbox"/>			Default
5	Grade (StudentSOREnrollment)		4		<input type="checkbox"/>			Default
6	Gender (Student)		5		<input type="checkbox"/>			Default
7	Home Language (Student)		6		<input type="checkbox"/>			Default
8	Resolved Race/Ethnicity (Student)	Ethnic Code	7		<input type="checkbox"/>			Default
9	Birth Date (Student)		8		<input type="checkbox"/>			Default
10	Home Address (Student)		9		<input type="checkbox"/>			Default

Hide Columns

Click the checkbox in the Hide column to exclude information displayed on the query output.

Step 3. Provide any desired property overrides								
Line	Name	Label Override	Order	Width	Hide	Group	Break	Display
1	Last Name (Student)				<input type="checkbox"/>			Default
2	First Name (Student)		1		<input type="checkbox"/>			Default
3	Middle Name (Student)		2		<input checked="" type="checkbox"/>			Default
4	Perm ID (Student)	STU#	3		<input type="checkbox"/>			Default
5	Grade (StudentSOREnrollment)		4		<input type="checkbox"/>			Default
6	Gender (Student)		5		<input type="checkbox"/>			Default
7	Home Language (Student)		6		<input type="checkbox"/>			Default
8	Resolved Race/Ethnicity (Student)	Ethnic Code	7		<input type="checkbox"/>			Default
9	Birth Date (Student)		8		<input type="checkbox"/>			Default
10	Home Address (Student)		9		<input type="checkbox"/>			Default

Re-Order Columns

Change column order by entering a numeric value in the Order column.

Step 3. Provide any desired property overrides								
Line	Name	Label Override	Order	Width	Hide	Group	Break	Display
1	First Name (Student)		1		<input type="checkbox"/>			Default
2	Last Name (Student)		2		<input type="checkbox"/>			Default
3	Perm ID (Student)	STU#	3		<input type="checkbox"/>			Default
4	Grade (StudentSOREnrollment)		4		<input type="checkbox"/>			Default
5	Gender (Student)		5		<input type="checkbox"/>			Default
6	Home Language (Student)		6		<input type="checkbox"/>			Default
7	Resolved Race/Ethnicity (Student)	Ethnic Code	7		<input type="checkbox"/>			Default
8	Birth Date (Student)		8		<input type="checkbox"/>			Default
9	Home Address (Student)		9		<input type="checkbox"/>			Default
10	Middle Name (Student)		10		<input checked="" type="checkbox"/>			Default

Query

Adjust Column Width

Column widths are measured in inches. In this example the width of the Grade and Gender fields were adjusted to .25 inches. Columns can be adjusted so that all fields/columns display on PDF and Rich Text outputs. (**NOTE:** When adjusting the width of a column do not forget to change the Label Override to match.)

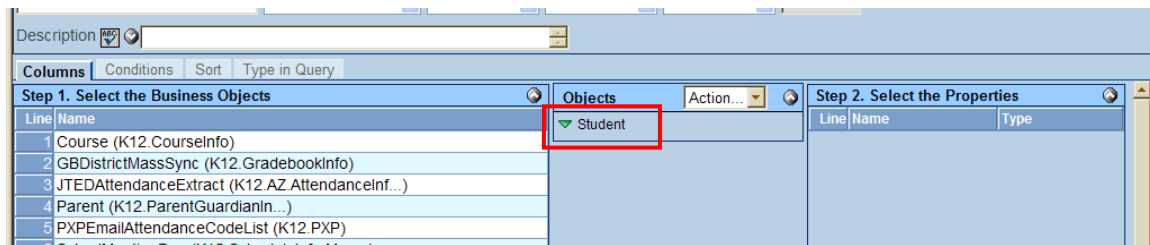
Step 3. Provide any desired property overrides								
Line	Name	Label Override	Order	Width	Hide	Group	Break	Display
1	First Name (Student)		1		<input type="checkbox"/>			Default
2	Last Name (Student)		2		<input type="checkbox"/>			Default
3	Perm ID (Student)	STU#	3		<input type="checkbox"/>			Default
4	Grade (StudentSORErollment)	GR	4	.25	<input type="checkbox"/>			Default
5	Gender (Student)	SX	5	.25	<input type="checkbox"/>			Default
6	Home Language (Student)		6		<input type="checkbox"/>			Default
7	Resolved Race/Ethnicity (Student)	Ethnic Code	7		<input type="checkbox"/>			Default
8	Birth Date (Student)		8		<input type="checkbox"/>			Default
9	Home Address (Student)		9		<input type="checkbox"/>			Default
10	Middle Name (Student)		10		<input checked="" type="checkbox"/>			Default

At this point the query can be executed to show the changes that have been made.

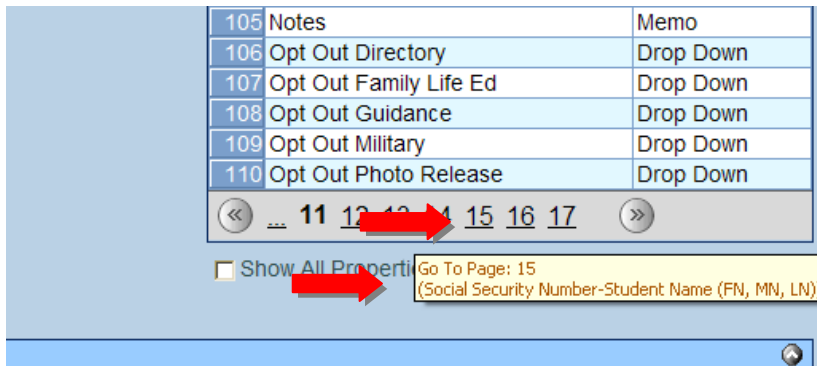
Change Student Name Format

The Student Name can be formatted so that it displays as a single column in the output. This is accomplished by adding the Student Name property to the property grid at the bottom of the Query view.

Click Student in the Objects group box. The properties for Student display in the Select the Properties group box to the right.

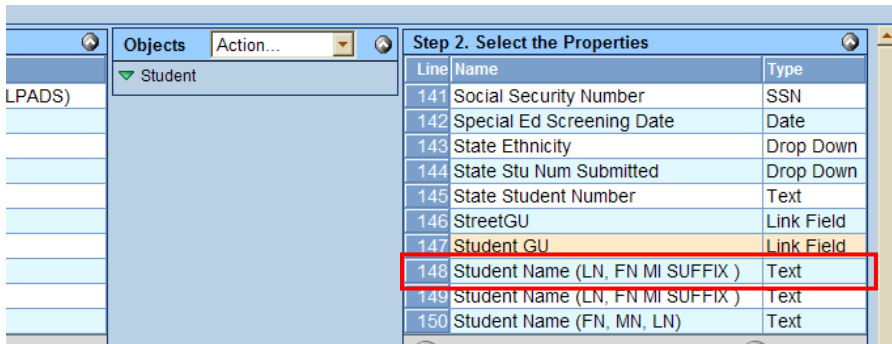


From the Select the Properties group box, locate a Property titled **Student Name**. Hovering across the numbers at the bottom of the column displays an index of what is included on that page.



Query

Click line number for Student Name in the appropriate format for the desired output. In this example the first Student Name property is selected.



When the property is selected it is added to the grid at the bottom of the screen. (**NOTE:** Hide Last Name and First Name so they will not show on the output but can be used for sorting purposes. Also, make sure to reorder the field so the Student Name displays first on the output.)

Line	Name	Label Override	Order	Width	Hide	Group	Break	Display
1	First Name (Student)		1		<input checked="" type="checkbox"/>			Default
2	Last Name (Student)		2		<input checked="" type="checkbox"/>			Default
3	Perm ID (Student)	STU#	3		<input type="checkbox"/>			Default
4	Grade (StudentSOREnrollment)	GR	4	.25	<input type="checkbox"/>			Default
5	Gender (Student)	SX	5	.25	<input type="checkbox"/>			Default
6	Home Language (Student)		6		<input type="checkbox"/>			Default
7	Resolved Race/Ethnicity (Student)	Ethnic Code	7		<input type="checkbox"/>			Default
8	Birth Date (Student)		8		<input type="checkbox"/>			Default
9	Home Address (Student)		9		<input type="checkbox"/>			Default
10	Middle Name (Student)		10		<input checked="" type="checkbox"/>			Default
11	Student.Student Name (LN, FN MI S		1		<input type="checkbox"/>			

Change Display Column

Within the data, each field is assigned a Default to Display. Gender, for example, displays the text name (description), although others may display the code, or both code and description. The data display can be changed through the use of the dropdown in the Display column. In the example below the Gender and Resolved Race/Ethnicity are changed to display the code instead of the description. This allows for the Label Override and Width columns to be changed also.

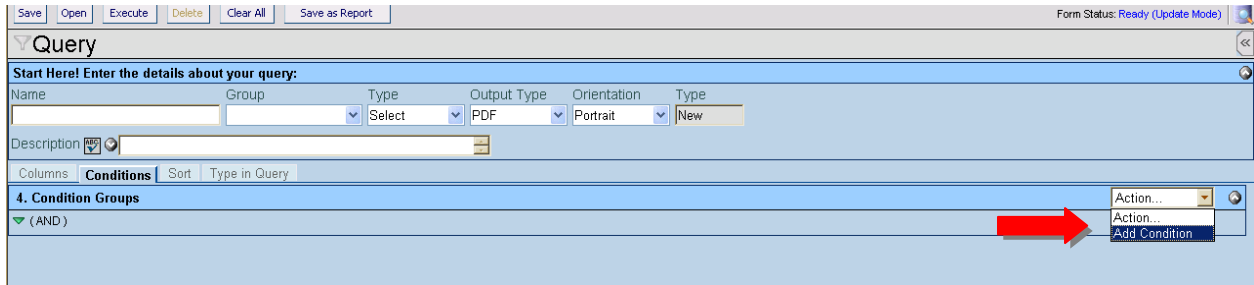
Line	Name	Label Override	Order	Width	Hide	Group	Break	Display
1	First Name (Student)		1		<input checked="" type="checkbox"/>			Default
2	Last Name (Student)		2		<input checked="" type="checkbox"/>			Default
3	Perm ID (Student)	STU#	3		<input type="checkbox"/>			Default
4	Grade (StudentSOREnrollment)	GR	4	.25	<input type="checkbox"/>			Default
5	Gender (Student)	SX	5	.25	<input type="checkbox"/>			Code
6	Home Language (Student)		6		<input type="checkbox"/>			Default
7	Resolved Race/Ethnicity (Student)	Ethnic Code	7		<input type="checkbox"/>			Code
8	Birth Date (Student)		8		<input type="checkbox"/>			Default
9	Home Address (Student)		9		<input type="checkbox"/>			Default
10	Middle Name (Student)		10		<input checked="" type="checkbox"/>			Default
11	Student.Student Name (LN, FN MI S		1		<input type="checkbox"/>			

Query

CONDITIONS TAB

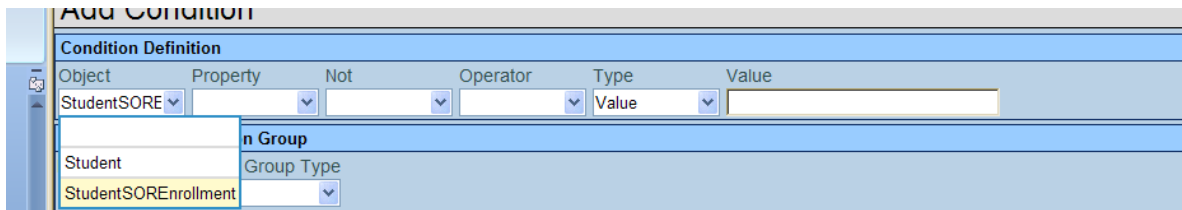
This tab allows the User to define specific criteria to be included (or not) in the query result. In the example here, we can choose to display only Students in a particular Grade.

Only students whose Grade is 10 will be included. On Conditions tab, select "Add Condition" from the **Action** dropdown.



The screenshot shows the 'Query' interface with the 'Conditions' tab selected. The 'Action...' dropdown menu is open, and a red arrow points to the 'Add Condition' option. The interface includes fields for Name, Group, Type, Output Type, Orientation, and Type, along with a Description field and a 'Columns' section with 'Conditions', 'Sort', and 'Type in Query' options.

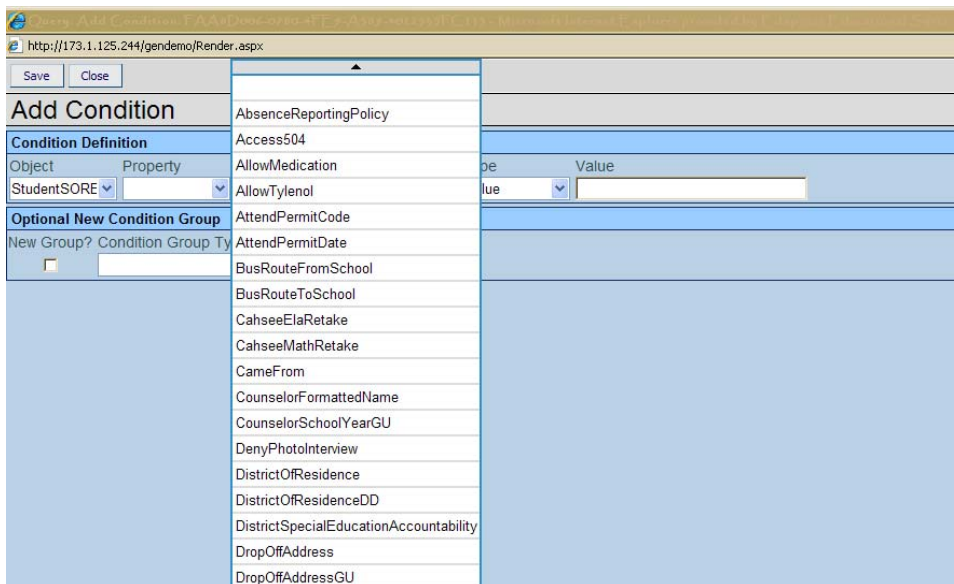
A new view, Add Condition, displays. Choose an **Object**. Your choices are Student or StudentSOREnrollment. Student objects are those that are directly related to the student, such as name, birth date, address, etc. StudentSOREnrollment (SOR stands for School of Record) objects are those related to enrollment functions, such as Grade, etc. For this query StudentSOREnrollment is selected.



The screenshot shows the 'Add Condition' dialog box. The 'Object' dropdown is set to 'StudentSOREnrollment'. The 'Property' dropdown is open, showing 'Student' and 'StudentSOREnrollment' options. The 'Condition Definition' table has columns for Object, Property, Not, Operator, Type, and Value.

Object	Property	Not	Operator	Type	Value
StudentSOREnrollment				Value	

Click drop down for **Property**. A long list displays, scroll down and select Grade. (NOTE: Pressing "G" on your keyboard brings the list to the first word beginning with "G".)



The screenshot shows the 'Add Condition' dialog box with the 'Property' dropdown open, displaying a long list of properties. The 'Object' is set to 'StudentSOREnrollment' and the 'Type' is set to 'Value'. The 'Property' dropdown is open, showing a list of properties including 'Grade'.

Object	Property	Not	Operator	Type	Value
StudentSOREnrollment	Grade			Value	

Query

Not is used to exclude a specific value.

Operator defines how the value is used; "Equal To" is selected for this example.

Add Condition

Condition Definition

Object	Property	Not	Operator	Type	Value
StudentSORE	Grade			Value	

Optional New Condition Group

New Group? Condition Group Type

Contains
Ends With
Equal To
Greater Or Equal To
Greater Than
In List

Type will rarely be changed from Value in queries, however the Value needs to be defined. Grade 10 is stated as '10'. So the complete Condition Definition is:

Save Close

Add Condition

Condition Definition

Object	Property	Not	Operator	Type	Value
StudentSORE	Grade		Equal To	Value	10

Optional New Condition Group

New Group? Condition Group Type

Save. The Condition is set.

Columns Conditions Sort Type in Query

4. Condition Groups

▼ (AND)

- ☐ Grade = '10'

Multiple conditions can be used in a single query as long as they do not conflict. For example Grade and Gender can be used to display a list of students with the specified grade and gender in the query condition.

SORT TAB

The default sort field for a student related query is last name. Additional sort fields can be added on the Sort Tab. (ex: Output is sorted by Gender.)

Columns Conditions Sort Type in Query

5. Define the sort output for the query

Line	BOAndProperty	Sort Order
1	Gender (R0.Student)	Ascending

Add

Query

TYPE IN QUERY TAB

This tab contains the Query in a text format. The text can be copied into a word document and saved for future reference, or e-mailed to a colleague.

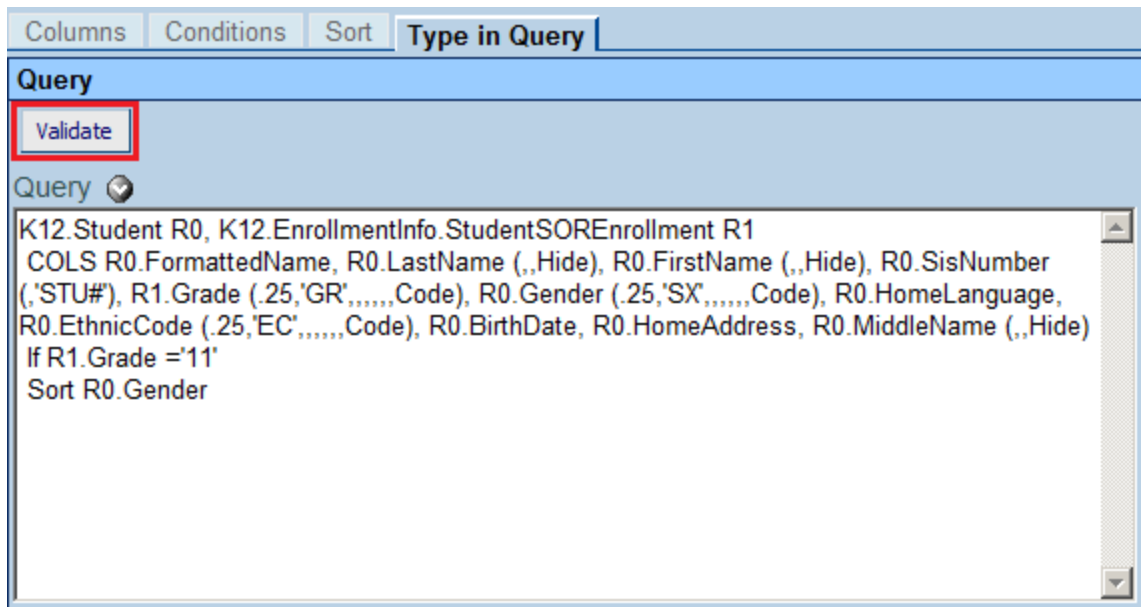
```
K12.Student R0, K12.EnrollmentInfo.StudentSOREnrollment R1
COLS R0.FormattedName, R0.LastName (.,Hide), R0.FirstName (.,Hide), R0.SisNumber
(,'STU#'), R1.Grade (.25,'GR',,,,,,Code), R0.Gender (.25,'SX',,,,,,Code), R0.HomeLanguage,
R0.EthnicCode (.25,'EC',,,,,,Code), R0.BirthDate, R0.HomeAddress, R0.MiddleName (.,Hide)
If R1.Grade ='10'
Sort R0.Gender
```

Modifying a Condition

Conditions are modified in two ways, either by deleting and re-entering the condition on the Conditions Tab or by using the Type in Query Tab and changing the criteria. In the query example above the grade level output is changed by changing the “10” to “11” on the Type in Query Tab. (**NOTE:** This also updates the Conditions Tab.)

```
If R0.Grade ='11'
```

Any changes made on the Type in Query tab must be validated by clicking the Validate button.



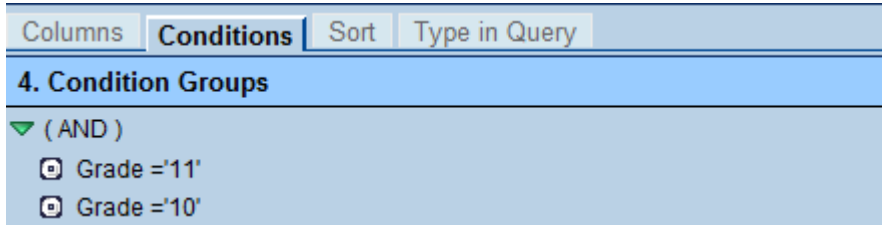
If the change made is valid a message displays stating “Query is valid.” If the change made is not valid a message displays stating what is invalid in the statement.

Query

Creating an “OR” Condition

If we want to build a query to display more than one Grade level, we will need to use an ‘OR’ statement.

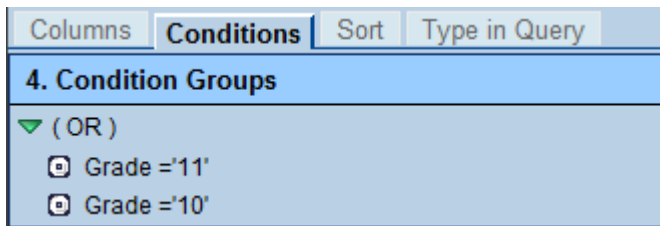
On the Conditions Tab add another condition for the subsequent grade level.



On the Type In Query Tab change the “AND” to “OR” and click Validate.

If R1.Grade = '10' **Or** R1.Grade = '11'

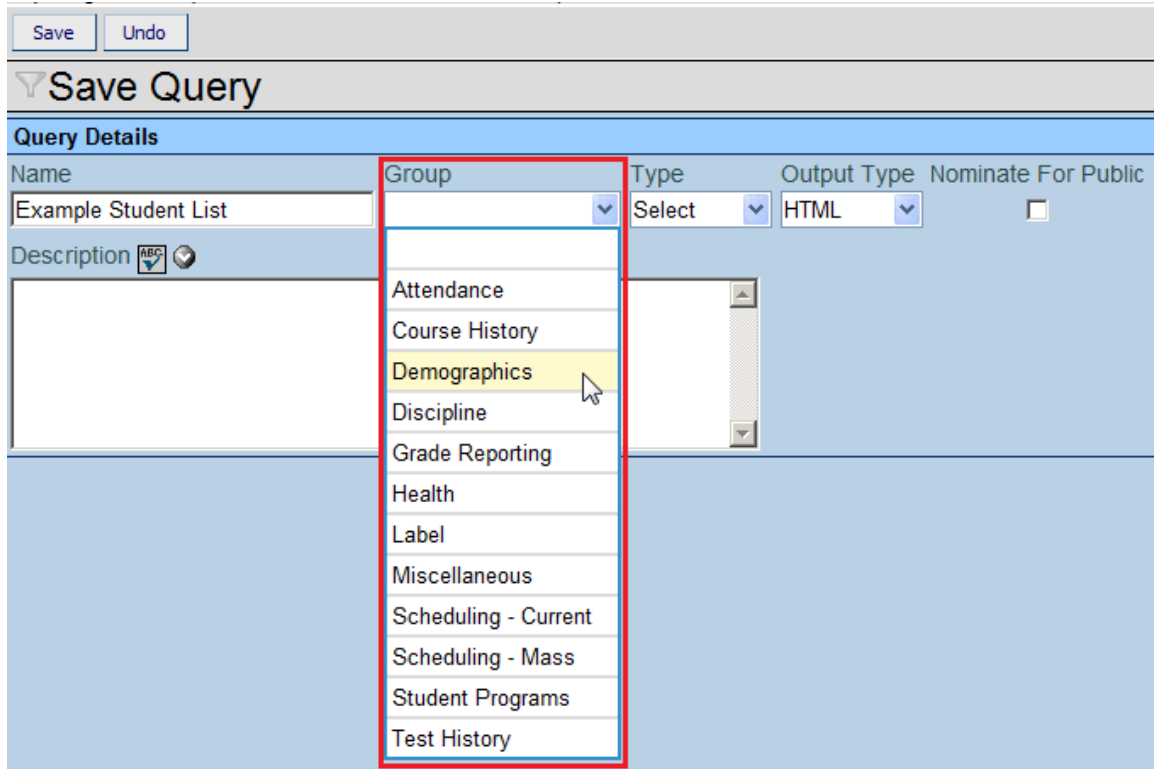
(NOTE: This also updates the Conditions Tab.)



Query

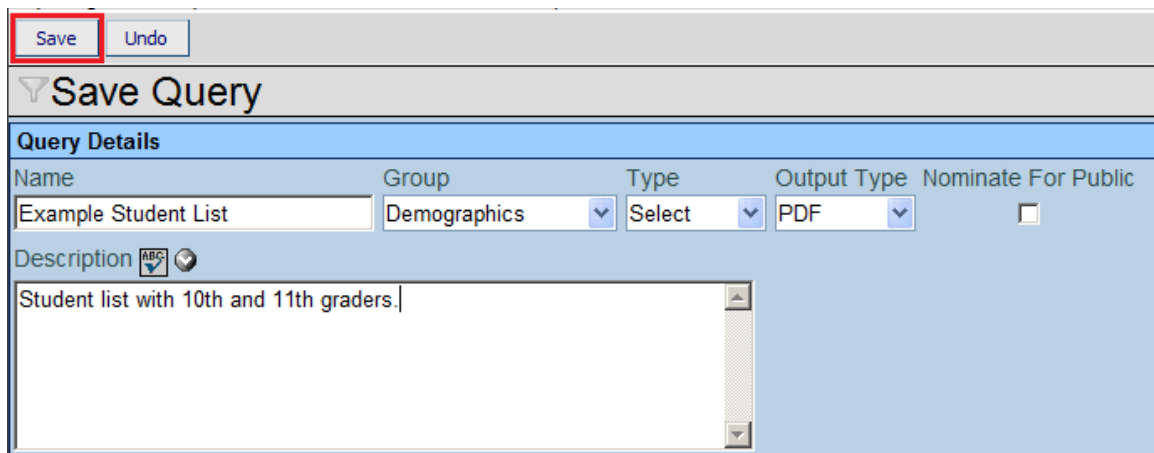
SAVE OPTIONS

To save a query for later use click the **Save** button at the top of the Query view. The Save Query Detail view displays. The Name field defaults to the information previously entered. Select the group to add this query to from the Group drop down menu.



The screenshot shows the 'Save Query' dialog box with the 'Group' dropdown menu open. The 'Save' button is highlighted with a red box. The 'Name' field contains 'Example Student List'. The 'Group' dropdown menu is open, showing a list of options: Attendance, Course History, Demographics (highlighted), Discipline, Grade Reporting, Health, Label, Miscellaneous, Scheduling - Current, Scheduling - Mass, Student Programs, and Test History. The 'Type' dropdown is set to 'Select' and the 'Output Type' dropdown is set to 'HTML'. The 'Nominate For Public' checkbox is unchecked.

The **Type** field defaults to "Select". Select the output type from the **Output Type** drop down menu. Enter a description in the **Description** text box. Click **Save**.



The screenshot shows the 'Save Query' dialog box with the 'Save' button highlighted with a red box. The 'Name' field contains 'Example Student List'. The 'Group' dropdown is set to 'Demographics'. The 'Type' dropdown is set to 'Select' and the 'Output Type' dropdown is set to 'PDF'. The 'Nominate For Public' checkbox is unchecked. The 'Description' text box contains the text 'Student list with 10th and 11th graders.'.

Query

The screen goes back to the Query view with the options entered on the Save Query Detail view.

The screenshot shows the 'Query' view of a software application. At the top, there is a toolbar with buttons for 'Save', 'Open', 'Execute', 'Delete', 'Clear All', and 'Save as Report'. Below the toolbar is a header area with a search icon and the word 'Query'. A blue banner below the header reads 'Start Here! Enter the details about your query:'. The main form area contains several fields: 'Name' (Example Student List), 'Group' (Demographics), 'Type' (Select), 'Output Type' (PDF), 'Orientation' (Portrait), and 'Type' (User). Below these fields is a 'Description' field containing the text 'Student list with 10th and 11th graders.'. At the bottom of the form, there are tabs for 'Columns', 'Conditions', 'Sort', and 'Type in Query'. Below the tabs is a 'Query' section with a 'Validate' button and a text area containing the following SQL query:

```
K12.Student R0, K12.EnrollmentInfo.StudentSOREnrollment R1
COLS R0.FormattedName, R0.LastName (,Hide), R0.FirstName (,Hide), R0.SisNumber
(,STU#), R1.Grade (0.25in,'GR',,,,,,Code), R0.Gender (0.25in,'SX',,,,,,Code),
R0.HomeLanguage, R0.EthnicCode (0.25in,'EC',,,,,,Code), R0.BirthDate, R0.HomeAddress,
R0.MiddleName (,Hide)
If R1.Grade ='10' Or R1.Grade ='11'
Sort R0.Gender
```

Nominate for Public

Public queries are available to other users in the district in the Query Admin view. A query becomes public after being nominated and then reviewed and approved by the designated approver.

To nominate a query to become public select the **Nominate For Public** check box on the Save Query Details view when the query is being saved.

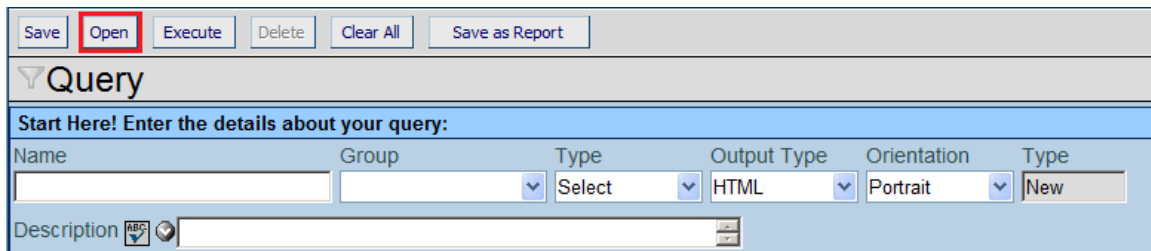
The screenshot shows the 'Save Query' view of a software application. At the top, there is a toolbar with buttons for 'Save' and 'Undo'. Below the toolbar is a header area with a search icon and the word 'Save Query'. A blue banner below the header reads 'Query Details'. The main form area contains several fields: 'Name' (Students by Grade), 'Group' (Miscellaneous), 'Type' (Select), 'Output Type' (PDF), and a 'Nominate For Public' checkbox. The checkbox is highlighted with a red box.

The query is sent to the individual designated by your organization to review and publish queries.

Query

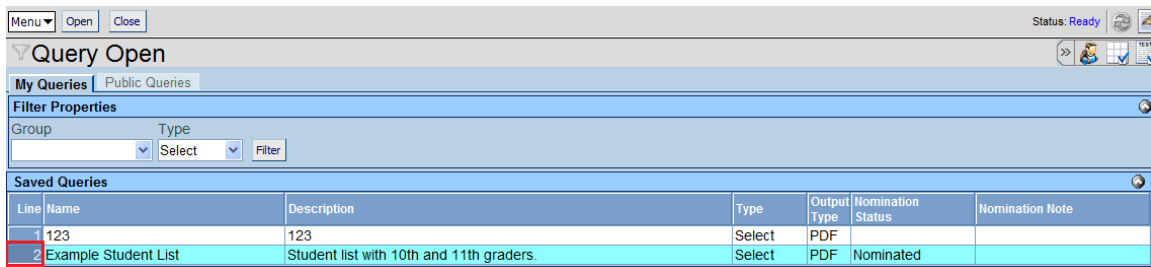
OPENING A SAVED QUERY

To open a saved query, click on the **Open** button at the top of the Query view.



The screenshot shows the top portion of the Query view. At the top is a toolbar with buttons for 'Save', 'Open' (highlighted with a red box), 'Execute', 'Delete', 'Clear All', and 'Save as Report'. Below the toolbar is a header area with a 'Query' title and a 'Start Here! Enter the details about your query:' instruction. The form contains several fields: 'Name' (text input), 'Group' (dropdown menu), 'Type' (dropdown menu with 'Select' selected), 'Output Type' (dropdown menu with 'HTML' selected), 'Orientation' (dropdown menu with 'Portrait' selected), and 'Type' (text input with 'New' entered). A 'Description' field with a text area and a 'Filter' icon is also visible.

The list of the user's saved queries displays in the Query Open view. Select the query to open by clicking on the line it is contained in and then pressing the **Open** button at the top of the view.



The screenshot shows the 'Query Open' view. At the top is a 'Menu' dropdown with 'Open' and 'Close' options. Below the menu is a 'My Queries' tab and a 'Public Queries' tab. A 'Filter Properties' section contains a 'Group' dropdown and a 'Type' dropdown with 'Select' selected. Below this is a 'Saved Queries' table with the following data:

Line	Name	Description	Type	Output Type	Nomination Status	Nomination Note
1	123	123	Select	PDF		
2	Example Student List	Student list with 10th and 11th graders.	Select	PDF	Nominated	

The query opens in the Query view and displays the same options, conditions and sorts that were saved when the query was created. Click the **Execute** button to get the query output. (**NOTE:** A saved query that is reopened can also be modified and saved with different criteria. Ex. User modifies this query to run for 9th and 12th graders and saves it with a different name.)

Query

SAVE AS REPORT

Saving a query as a report allows those users with the appropriate rights to access the query from the Navigation Tree and open it in a report interface instead of giving them access to the Query view.

To save a query as a report, click the **Save as Report** button on the Query view.

The screenshot shows a toolbar with buttons for 'Save', 'Open', 'Execute', 'Delete', 'Clear All', and 'Save as Report'. The 'Save as Report' button is highlighted with a red border. Below the toolbar is a 'Query' section with a blue header that says 'Start Here! Enter the details about your query:'. The form contains several fields: 'Name' (Example Student List), 'Group' (Demographics), 'Type' (Select), 'Output Type' (PDF), 'Orientation' (Portrait), and 'Type' (User). There is also a 'Description' field with a small icon and the text 'Student list with 10th and 11th graders.'

The Save User Report view displays.

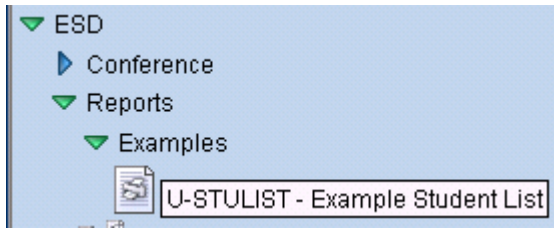
The 'User Report Options' dialog box has a blue header and a light blue background. It contains the following text: 'Saving a query as a user report provides the ability to make query reports executeable via the same simple RI just like all existing system reports. The reports can then be modified via the RT Edit (the end user rreport designer). Upon save, a named report will be created in the PAD tree under your User\Reports PAD group.' Below this text are several input fields: 'Namespace' (UD), 'Report Name' (empty), 'Report ID' ('U' + empty), and 'Location of Report In PAD' (empty). There are also two checkboxes: 'Overwrite Existing Report Layout (RPX)' and 'Overwrite Existing Query Data (Extract Data)'. At the bottom, there is a paragraph of text explaining the 'Location of Report in PAD' field and an example value: 'Student\Reports\List'.

Populate the **Report Name**, **Report ID** and **Location of Report in PAD** fields in the User Report Options group box and click the **Save** button.

The 'Save User Report' dialog box is shown with the 'User Report Options' section. The 'Namespace' field is populated with 'UD'. The 'Report Name' field is populated with 'Example Student List'. The 'Report ID' field is populated with 'U' + 'STULIST'. The 'Location of Report In PAD' field is populated with 'Reports\Examples'. The 'Overwrite Existing Report Layout (RPX)' and 'Overwrite Existing Query Data (Extract Data)' checkboxes are unchecked. The text at the bottom of the dialog box is the same as in the previous screenshot.

Query

The report displays at the top of the PAD tree in your Organization node.



The query, now saved as a report, has the same options as all other reports in the system. The query is executed from a report interface instead of the Query view. The query can be scheduled to print on a regular basis from the Advanced tab of the report interface.