

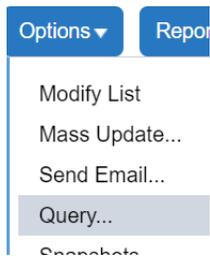
CREATING A QUERY AND FILTER

A query is a dynamic filter. A query performs a new search and displays current information each time it is run. For example, the list of students assigned to a counselor may be different today than it was yesterday because a new student enrolled and was assigned to the counselor.

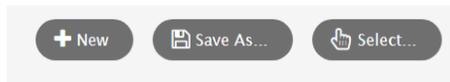
CREATE A SIMPLE QUERY

From any list page, such as the **Student** list

1. Options > Query



2. Click **New** to create a new query or **Select...** to open a saved query



3. Click the **Tables drop down menu** to select the table containing the field you want to search on, such as **Student**

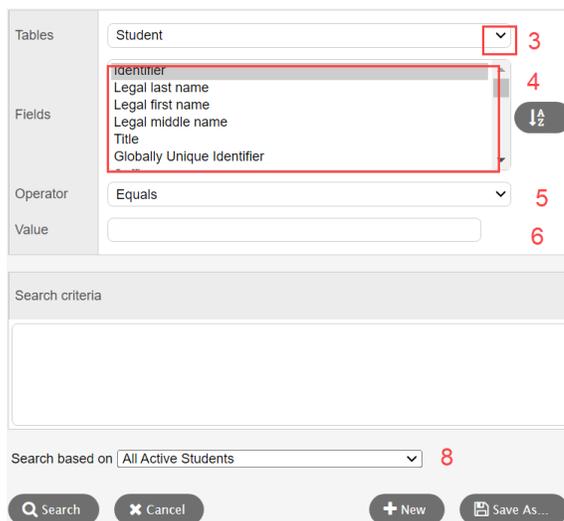
4. In the **Fields** box, scroll and select the field you want to include such as **Year of Graduation**

5. Click the **Operator drop-down menu** to select an operator, such as **Equals**

6. Type the value you are searching for, such as **2026**

7. Click **Add** to add the criteria to the **Search criteria** box

8. Choose **Search based on** criteria

A screenshot of the query creation form. It has several sections: 'Tables' with a dropdown menu showing 'Student' (callout 3); 'Fields' with a list of fields including 'Identifier', 'Legal last name', 'Legal first name', 'Legal middle name', 'Title', and 'Globally Unique Identifier' (callout 4); 'Operator' with a dropdown menu showing 'Equals' (callout 5); 'Value' with an empty text input field (callout 6); 'Search criteria' with an empty box; and 'Search based on' with a dropdown menu showing 'All Active Students' (callout 8). At the bottom are buttons for 'Search', 'Cancel', '+ New', and 'Save As...'.

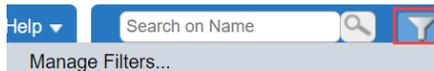
- Click **Save As**, give the query a name, and select the **Save as Filter** checkbox
- Choose Owner Type: User or School

Name	Enter Filter Name
Query	
Owner type	School
Owner name	Brentwood Elementary
Filter	
Save as filter	<input checked="" type="checkbox"/>
Owner type	School
Owner name	Brentwood Elementary
Move to top of my list	<input type="checkbox"/>

- Click **Search**
- Use the filter icon to return to the list of **All Active Students**
- Use the filter icon to run the queries created

REMOVE A QUERY FROM THE FILTER

- Click the filter icon
- Select **Manage Filters**
- Select query to remove
- Click **Delete**
- Close**



DELETE A QUERY

- Options > Query >
- Click **SELECT** button (in the popup) > Select the Query
- Select the Query by name
- Click **DELETE** button
- Click **CANCEL** to close the popup >
- Click **CANCEL** again in the remaining popup to close it.

