Create Simple mode queries

Simple mode queries search for records based on the system's lists of tables, fields, and operators.

For example, create a Simple query to search for all students graduating in 2025 who are in homeroom 100. After you save this query and run it again, it will include a student who transfers into this homeroom and exclude a student who moved out of the district. Saved Simple queries always search for records based on the same criteria.

To create a Simple query:

1. Go to a list page, such as the Student List.
2. On the **Options** menu, click **Query**. The New Query pop-up appears.
3. Complete the fields in the New Query pop-up.
4. In the **Tables** field, select the table you want to search information in. The table you select determines the **Fields** selections. For example, if you select the **Student** table, fields such as **Year of graduation** and **Last name** appear.
5. At **Fields**, select the field you want to include in the search criteria.

> **Note**: Fields within each reference table are listed from most commonly used to least commonly used. To change this order to alphabetical, click the **Alpha Sort** button [a→z] .

6. Click **Add** to add the criteria to the **Search criteria** box.
7. To delete the criteria from this search, highlight it and click **Delete**. Or you can add other criteria, or click **Search** to search for students who match the one criterion you defined.
8. To add other criteria, select the **Table**, **Field**, and **Operator**, and enter the **Value**, if appropriate. Then, click **And** or **Or** to determine if the students should meet the first criteria, the second criteria, or both to be included in the search.
9. At **Search based on**, select the records you want to search on to determine which records are included in this query.
10. If you want to save this query to use it again or to give other users access to it, click **Save As**. The Save As pop-up appears.
11. Complete the fields in the Save As pop-up.
12. Click **Save**.
13. Click **Search**. The list page displays the records that meet your search criteria.

Using Snapshots to Create and Store Groups

A snapshot represents a static filter. Think of a snapshot as a picture of a particular group of students, staff members, courses, or rooms that you can file and easily retrieve.

Create a snapshot to group records that don't have a field in common that can be queried (such as a group of students you want to monitor) or to create a list that's associated with a specific time (Q1 Honor Roll).

For example, assume you manage the Math club and want to be able to quickly access all of the students who are members. You can use a query to find the students initially, and then create a snapshot of these students. This way, each time you want to work with students in the Math club, you need only refer to your snapshot.

You can also manage snapshots for individual records.

To create a snapshot:

1. Do one of the following:
   - To create student snapshots, log on to any view and click the **Student** tab.
   - To create staff snapshots, log on to the District or Intermediate Organization view and click the **Staff** tab.
   - To create special education snapshots, log on to the Special Education view and click the **IEP** tab.
   - To create course snapshots, log on to the Build view, and click the **Courses** tab.
   - To create room snapshots, log on to the Build view, and click the **Rooms** tab.
2. Search for or select the records you want to include in your snapshot. You might select these records individually, or use a query to find them.

> **Note**: Be sure to select the checkbox next to each record you want to include in your snapshot, click the **Options** menu, then click **Show Selected**.

3. Select **Options > Snapshots**.

Using Snapshots to Create and Store Groups (continued)

4. In the Manage Snapshots pop-up, click **New**. The Snapshot Definition pop-up appears.

Name	Math Club
Owner	Follett Public Schools ⌄
Save as filter	☐
Move to top of my list	☐

Records to Include

- ● Current List
- ○ Snapshot Combination
  - High Honors - Quarter 3 Grade - 2011-2012 ⌄
  - Union ⌄
  - High Honors - Quarter 3 Grade - 2011-2012 ⌄

💾 Save   ✖ Cancel

5. Type a name for this snapshot.
6. Click the **Owner** drop-down to select the user, school, intermediate organization, or district as the owner. This determines which other users, if any, can use this snapshot.

> **Note**: Not all users have privileges for all levels of ownership.

7. If you would like to make this snapshot an option on your **Filter** menu 🔽 , select the **Save as filter** checkbox.
8. If you would like this snapshot to be your default filter (for example, whenever you open the Student List, these are the records you'd like to see), select the **Move to top of my list** checkbox.
9. In the **Records to Include** box, select one of the following:
   - **Current List** to include only those records you selected checkboxes for on the list page.
   - **Snapshot Combination** to combine two existing snapshots. (This option is only available if you have already defined at least two snapshots.)
10. If you selected **Snapshot Combination**, use the following table to determine how you want to assemble the two snapshots you select:

Select	To include the following in the snapshot:
Union	Any records that appear in the first snapshot you select or the second snapshot you select. For example, if you want to create a snapshot of students who appear on either or both the first term and second term honor roll, select Union.
Intersect	Only records that appear in both the first and second snapshot you select. For example, if you want to create a snapshot of students who appear on both the first and second term honor rolls, select Intersect.
Difference	Any record that appears in the first snapshot you select, but not in the second. For example, if you want to create a snapshot of students who appear on the first term honor roll, but not on the second term honor roll, select Difference.

11. Click **Save**. The Manage Snapshots pop-up displays the snapshot you created.
12. Select the snapshot you created, and click **Use**. The list page displays the records in the snapshot selected.

> **Note**: You can also save a snapshot to the **Filter** menu on a list page. Then, you can quickly select that snapshot.