

# FILTERS, FIELD SETS, & SORT ORDERS

Filters, Field Sets, & Sort Orders are ways by which you can manipulate the data you see on a screen in X2. When you select a particular Top tab (student, schedule, etc), depending on what type of access you have, each Top Tab will have its own set of Filters, Field Sets, & Sort Orders that are relevant to it.

\* The information & instructions that follow are based on School View, Student Top Tab, however the skills and steps explained can be used in Staff View, any of the top tabs as well.



**Filters** (playfully referred to as the Martini Glass b/c of the shape of the icon)

Filters are ways by which you select which students you will see in the list view. For example there is a filter to select just the students in a single grade level, a filter to select students in a particular course, or several more. Simply put, Filters are a selected list of students to look at.



**Field Set**

Field sets are the columns of information you choose to see on the screen for the chosen group of students. For example, the default Field Set displays Name, address, phone, homeroom, etc. But you can choose the Lockers field set and see what locker # the students have or you can create your own field set to display any info that is kept in X2. Simply put, Field Sets are the specific bits of information you choose to look at for the selected list of students.



**Sort Order**

Sort order is the way in which you sort the data displayed. A common, single-field sort order may be Alpha by last name. However you have the ability to create a multi-field sort order, for example sort by homeroom, then by last name.

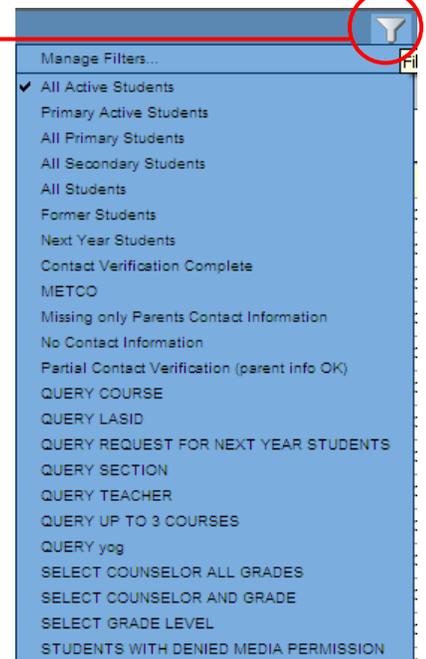
Filters, Field Sets, & Sort Orders are all independent of one another. You can use any Field Set with any Filter and sort it any way you want.

Please note that you can only have access change how the data appears to you. By learning these steps, you do not have the ability to change the data itself so you do not have to worry about making mistakes and changing the actual student data.

## USING FILTERS

There are several filters already created for you to use; some will be relevant to you, some will not.

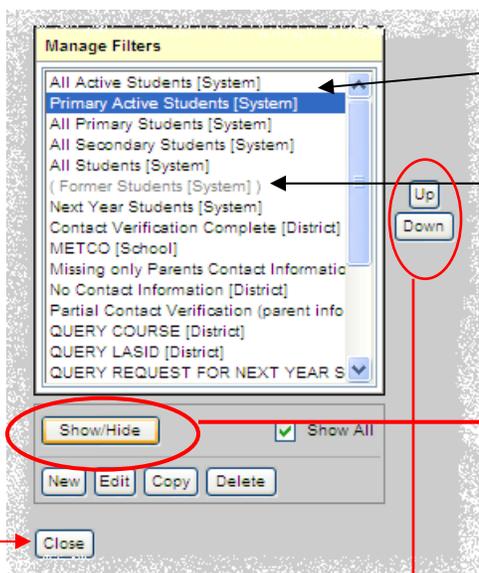
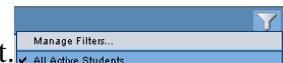
- Click on the Filter Icon (Martini Glass) and the list will pop up.
- Select the filter you want by clicking on it.
- Some filters will just bring up a list of students based on pre-set information; for example All Active Students & Former Students.
- Some filters require that you enter some additional information; if so another dialog box will appear. For example Query YOG or Query Course will ask you to enter the specific info that you are looking for.



You also have the ability to Hide those filters that are not relevant to you, as well as changing the order in which that the filter appear on the list.

### Hide Filters

- Click on the Filter Icon & choose Manage Filters at the top of the filter list.



- The Manage Filters dialog box will pop up.
- If you want to hide a specific filter, simply click on it once to highlight it.
- Click on the Show/Hide button.
- The filter will now be “grayed out”, with parenthesis around it, meaning that it will still be available to you, but will not appear on your filter list.
- Repeat for any other filters that you want to hide.
- To unhide a filter, simply click on a grayed out filter and click the Show/Hide button and that filter will become a regular black font, becoming visible again when you click on the Martini Glass.

### Change the order of Filters

- To change the order in which the filters appear on your list, simply click on it once to highlight it, then click on the Up or Down button and the filter will move accordingly.
- The filter you place at the top of your list will be your default filter, meaning that is the list of students that will appear automatically when you select the Student Top Tab.
- When done with changing the order or show/hide of filters, click on the Close button.
- Now click on your Martini Glass and the changes you should see the changes you made.

## USING FIELD SETS

### Hide & Change the order of Field Sets

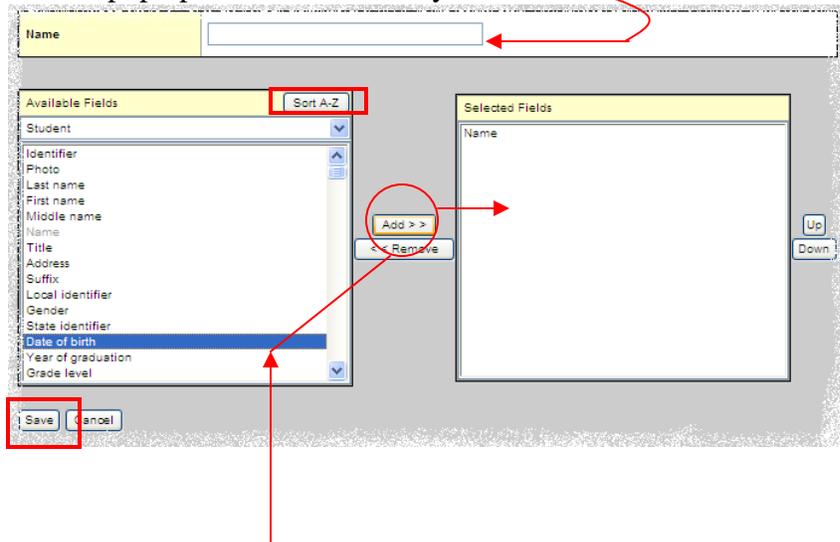
Show/Hide and changing the order of Field sets are done exactly the same way as Filters.

### Creating Field Sets

If none of the existing field sets shows you the information you want to see, you can create your own.

- Click on the field set icon and choose Manage Field Sets 
- Click on the New button (located just under the Show/Hide button).
- The Define Field Set Dialog box will pop up. Enter a name for your field set.

- Just below the Name field will be the Owner field (not pictured). This lets you choose who can see the Field Set. Depending on your level of security privileges, it is available only to you, to everybody in the school, or everybody in the District. \*Note teachers can make field sets that *only* they can see themselves.



- Below that, on the left is a list of available fields that you can choose from. Click on a field that you want to include to highlight it and then click the Add button. You will see it appear on the right side under Selected Fields and in the original list on the left it will become “grayed out”. Repeat for all the fields you want to include.  
TIP: the fields are not listed in any particular order but you can click on the Sort A-Z button and they will all appear in Alpha order.
- Using the Up and Down buttons, arrange the fields, top down, in the order that you want them to appear on the screen going from right to left.
- To remove a field from your set, just click on it on the right to highlight it and click the remove button. It will disappear from the field set list on the right and return to a black font on the left.
- **CLICK SAVE** to save your field set. X2 will not automatically save this so be sure to click save or all your work is lost.
- After clicking save, you will be brought back to your Manage Field Sets dialog box. Use the Up and Down buttons to arrange your list of field sets as desired.
- The Field Set you place at the top of your list will be your default set, meaning that is the Field Set that will appear automatically when you select the Student Top Tab.
- When done with changing the order or show/hide of Field Sets, click on the Close button.
- Now click on your Field Set icon and the changes you should see the changes you made.

## **SORT ORDERS**

### Hide & Change Sort Orders

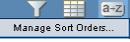
Show/Hide and changing the order of Sort Orders are done exactly the same way as Filters & Field Sets.

### Creating Sort Orders

For a simple, single-field sort orders, for example by name, or by homeroom, simply click on the header of the column and the list will sort by that data element. In the example below, you can tell Homeroom is selected as the sort, A-Z, by the arrow. To reverse the sort just click on the column header again and it will sort from Z-A.

0 of 878 selected 					
LASID	DOB	Grade	Homeroom ▲	Counselor	Gender
110082	11/16/1993	11	A211	BOWE	F

To create a multi-filed sort order, the steps are the same as creating a Field Set.

- Click on the a-z icon and choose Manage Sort Orders  .
- Click on the New button (located just under the Show/Hide button).
- The Define Sort Order Dialog box will pop up. Enter a name for your Sort Order.
- Below that, on the left is a list of available fields that you can choose from. Click on the first field that you want to sort by to highlight it and then click the Add button. You will see it appear on the right side under Selected Fields and in the original list on the left it will become “grayed out”. Repeat for the next field you want to Sort by.
- Using the Up and Down buttons, arrange the fields, top down, in the order that you want them to sort by. The top field will be the first field sorted by and the next field will be the secondary sort. So if homeroom is first and name is second, X2 will sort by homeroom, and then list the students in each homeroom in Alpha order.
- **CLICK SAVE** to save your Sort Order. X2 will not automatically save this so be sure to click save or all your work is lost.
- After clicking save, you will be brought back to your Manage Sort Order dialog box. Use the Up and Down buttons to arrange your list of field sets as desired.
- The Sort Order you place at the top of your list will be your default set, meaning that is the Sort Order that will appear automatically when you select the Student Top Tab.
- When done with changing the order or show/hide of Sort Orders, click on the Close button.
- Now click on your Sort Order, a-z, icon and the changes you should see the changes you made.

**A LIST OF CURRENT FILTERS AND WHAT THEY FILTER FOR**

All Active Students	Exactly what it says, all students currently enrolled in the school
Primary Active Students	HIDE THIS. Redundant query not applicable for our District.
All Primary Students	HIDE THIS. Redundant query not applicable for our District.
All Secondary Students	HIDE THIS. Redundant query not applicable for our District.
All Students	This includes all students that have been in the school during this year, starting July 1. It can include summer grads/transfers and those who transferred out during the academic year.
Former Students	Students who started the year in the school, are still in the district, but have transferred to another school. More applicable at the Elementary level.
Next Year Students	Students anticipated being in the school next year. At WHS, filters out current grade 12 and includes current grade 8.
Contact Verification complete	Students who's contact & emergency contact info is full and complete
METCO	Filters out only METCO students
Missing only Parents Contact Information	Students who's emergency contact info is full and complete but parent contact info is incomplete
No Contact Information	Missing all contact info
Partial Contact Verification (parent info OK)	Students who's parent contact info is full and complete but emergency contact info is incomplete
Query Course	Select this, another dialog box opens. Enter course # and all students in that course are filtered.
QUERY LASID	If you have a student ID # but do not know who it belongs to, select this, another dialog box opens. Enter student # and find the matching name.
QUERY REQUEST FOR NEXT YEAR STUDENTS	Select this, another dialog box opens. Enter course # and all students scheduled for that course next year are filtered.
QUERY SECTION	Select this, another dialog box opens. Enter course #, including section and all students in that course are filtered.
QUERY TEACHER	Select this, another dialog box opens. Enter teacher name and all students that have that teacher (including study) are filtered.
QUERY UP TO 3 COURSES	Select this, another dialog box opens. Enter up to 3 course #s and all students in those courses are filtered.
QUERY yog	Select this, another dialog box opens. Enter desired grad year and all students in that class are filtered.
SELECT COUNSELOR ALL GRADES	Select this, another dialog box opens. Select guidance counselor name and all students who have that counselor are filtered.
SELECT COUNSELOR AND GRADE	Select this, another dialog box opens. Select guidance counselor name and choose a grade all students from selected grade who have that counselor are filtered.
SELECT GRADE LEVEL	Select this, another dialog box opens. Select desired grade and all students in that class are filtered.
STUDENTS WITH DENIED MEDIA PERMISSION	Students who's image or name cannot appear on the web or in any other publication produced by Westwood Public Schools.