The state provides a Desk Monitoring Tool Process document, but it may not have been updated for NexGen yet. State-provided documentation should always be used, when possible, as there may be state customizations or policies of which we are unaware. However, because the processes will have changed slightly from the Desk Monitoring Tool provided by the state, I have included search instructions below of the data points included in the Monthly Data Monitoring spreadsheet

of Students Who Need a Pre-Test (2 methods)

1. Method 1
   a. Go to the Student grid
   b. Click the blue Searches link on the left hand side of your screen
   c. Click the triangle to expand the NRS searches
   d. Go to Current Fiscal Year and click Add
   e. (You can skip steps c-f if you already have the Current Fiscal Year tile applied)
   f. In the Assessment Status in Subject Area column, click the blank space below the column heading to filter.
   g. Type never and click the filter icon to select "Starts with" or "Contains"
   h. This will return any student whose assessment status is Never Assessed this FY, indicating they need a pre-test

2. Method 2
   a. Go to the Student grid
   b. Click the blue Searches link on the left hand side of your screen
   c. Click the triangle to expand the NRS searches
   d. Go to Current Fiscal Year and click Add
   e. (You can skip steps c-f if you already have the Current Fiscal Year tile applied)
   f. Go to the Search panel again
   g. Click the triangle to expand the Assessments searches
   h. Go to Assessments Generating Levels in Fiscal Year and click Add
   i. When the search results are displayed, click the "And" modifier box between the Current Fiscal Year and Assessment Generating Levels in Fiscal Year search tiles and change it to "And Not"
   j. This will return any student whose does not have an assessment generating a level in this fiscal year, indicating they need a pre-test

of Students Who Can Post-Test – Enter the number of students with approved instructional hours (note: 30 hours + for ASE, 50+ hours for ABE, and 60+ hours for ESL students) but have not yet been tested. (2 methods)

1. Method 1
   a. Use the Dashboard item Student Alerts: Students eligible for post-testing
   b. Click the number displayed for that alert row

2. Method 2
   a. Go to the Student grid
   b. Click the blue Searches link on the left hand side of your screen
   c. Click the triangle to expand the NRS searches
   d. Go to Current Fiscal Year and click Add
   e. (You can skip steps c-f if you already have the Current Fiscal Year tile applied)
   f. Go to the Search panel again
   g. Click the triangle to expand the Assessments searches
   h. Go to More Than X Inst Hours Since Last Assessment Date and click Add
   i. Enter the number of hours on which to search (you may need to run this search multiple times due to the assessment policy requiring different hours based on entry level)
   j. Check the "In subject area" box
   k. Click Apply
   l. Optimally, you would run this multiple times, one for ASE, one for ABE, and one for ESL since they all need different numbers of hours for post-test. You can use the in-column filtering in the Entry Level column to narrow down by the various options.

   Try both and use the one that you feel is most accurate for your program.

Follow-up Question: What would be the best way to print the list once you have the result?

From the Student grid with the results displayed, go to Export>CSV. This will display the results in an Excel spreadsheet, which you can then print, or save in an .xls, .csv, or .pdf format for future use, printing or emailing.

"Participants with 12 hours Plus" – Use NRS Table 4
   m. Select Reports from the upper right hand menu
   n. Select "Fiscal Year Data NRS Table 04: Educational Gains and Attendance" beginning 2013
   o. View the "Total Number Enrolled" (Column B) to obtain the number.

Enrollees under 12 hours – Enter the number of students that are not fundable (less than 12 hours of attendance).

   p. Go to the Student grid
   q. Click the blue Searches link on the left hand side of your screen
   r. Click the triangle to expand the NRS searches
   s. Go to Current Fiscal Year and click Add
   t. (You can skip steps above if you already have the Current Fiscal Year tile applied)
   u. Go to the Searches panel again
   v. Go to NRS Fundables, click Add
   w. When the search results are displayed, click the "And" modifier box between the Hours Attended and NRS Fundables search tiles and change it to "And Not"

Avg Participant's Contact hours to date – Use NRS Table 4 and divide the total Attendance Hours by number of Total Number Enrolled.

       x.   Select Reports
       y.   Select "Fiscal Year Data NRS Table 04: Educational Gains and Attendance" beginning 2013
       z.   Divide totals (Column C) by (Column B) to get the average hours

Follow-up Question: what are the other criteria for NRS participation status, other than 12 hours?

To be an NRS participant, students must have 12 or more instructional hours in the current FY, be 16 years of age or older, and have a valid assessment resulting in a valid entry level, as well as having all necessary demographic information entered in a valid format.

Total contact hours – Enter Total from Column C on NRS Table 4

# of Level Gains – Enter the total "Number Completed Level (Column D)" from NRS Table 4

Met 60% Posttest Rate – Enter the Overall Post Test Rate Percentage from the dashboard on LACES. This will be displayed at the top of the Dashboard alert called "Post Test Percentage Rate by EFL Current FY"

Hours between Assessments – Enter the number of out of range assessments (if less than 30 hours for an ASE, less than 50 hours for Abe and less than 60 hours for ESL) In notations, comment on corrections or waivers given. 20% of all students for the year may receive a waiver to test early. You must track these students and **make comments** in LACES regarding the waiver.

To use the Hours Between Assessments report, use the in-column filtering in the Entry level column to find students whose entry level contains ESL, ABE, or Secondary.
For ASE students, filter by secondary>contains. For ABE, filter by ABE>Contains, anf for ESL filter by ESL>Contains. From each separate selection, go to Reports>Hours Between Assessment report. Run on 29 hours for Secondary, 49 for ABE, and 59 for ESL.

Follow-up Question: How do we run the comments report to verify that exceptions have been noted?

To run the comments report and view comments related to early testing, from the student grid, go to Rpoerts>Student: Comments by Date Range, Comment Type and Comment like. Click the checkbox to the left of the report. Enter the date range desired in the information window in the right-hand panel. You can also choose to enter the Comment Type like field, if desired. It can be a good idea to modify the Comment Type choice list to include an option such as "Assessment Waiver" or "Early Tested" or something indicating that this student was tested outside of the state assessment policy, so that you can pull this report with only the comments related to this issue instead of showing all comments.

Follow-up Question: How do we modify the choice list for "Comment Type"?

Modifying Choice Lists is one of the most powerful ways that you can customize your database. Many of the fields in your database that have a drop-down menu can be customized by you. These menus can be customized by adding new choices, hiding choices, editing existing choices, or changing the order in which choices are displayed. To modify your choice list, go to the Agency Settings option in the Person Profile menu in the upper right hand corner of the database.

From the available tabs, click Choice Lists and wait while the available options load. You will know the list has loaded when the top window has filled in with an item, such as Abuse. Click the drop-down menu to the right of the item and search the available options for the field you wish to modify. In this example, you would locate Comment Type. Click to select.

To add an item to the choice list, click **Add New Item** and complete the applicable fields in the Display Order, Short Description, Long Description, and Visible Box, then click Save. The "Display Order" field lets you choose the numerical order in which you want the new choice list item to display. Smaller numbers will display first. We recommend that if you are choosing numbers for the display order, choose items with a wide range such as 10, 20, 30, or 100, 200, 300, etc., rather than 1, 2, 3, so that if you ever need to add additional items, you won't have to re-order your whole list. Although you cannot delete choice list items, you can make them not visible by deselecting the "Visible" box. Hiding a choice list item will not remove that item if it has already been added to a record; however it will prevent the item from displaying in the drop-down menu in the future. Editing an existing item acts retroactively, and will change that item if it has already been added to a record.

It is **extremely** important to remember that modifying the items in your Choice lists can impact whether data populates to your reports correctly. Certain fields are directly data-mapped to reports and modifying those items or using another choice list item similar to a default item can impact your reports. We recommend that only one person in your agency modifies choice lists, so that there is a consistent record of changes made. Changes made to the Choice List affect everyone in the agency, not just the user who makes the change.

Tip: If there is no modifier to the word, it will usually refer to the Student, such as Keyword. Other population Keywords would be listed as TutorKeyword, **ClassKeyword**, etc.

Diagnostic Checks / Notations Run the Student Diagnostic Search and enter comments. This should have all "0" after corrections. In the notations enter "ran FY diagnostics and made corrections or there were no errors." See question below regarding Student Diagnostic Search for questions on this search.

Check Table 5 to make sure the people in Column B are **included** in the Survey or Data Match for **enter postsecondary** and **HSEC** Column D.

Bottom of Page 1

1. **EFL** – This column describes the NRS levels matching the levels on NRS Table 4
2. **State Level Gains Targets** – These are the Performance Level Gains Targets negotiated with OCTAE that each program is expected to reach this year.
3. **Local Program Level Gains** – Enter the Percentage Completing Level Total (Column H)
4. **Date** – On the day you finishing entering data for the previous month run NRS Table 4. Enter the percentage from each EFL in Column H on the Monitoring Targets to Date form and enter the date.

2. **How do we search for graduates (HSEC completions) by date obtained, only? (We need to be able to find the information outside of "current fiscal" year or on NRS tables.)**

You can locate students who have passed the GED, TASC, or HiSet (provided the scores have been entered into LACES) by conducting a General Assessment Search or Diploma Search.

To conduct a General Assessment Search that includes only students who passed the HSE equivalency exam of your choice, do the following:

1. Go to the Student grid
2. Click the blue Searches link on the left hand side of your screen
3. Click the triangle to expand the Assessments search
4. Go to General Assessment Search, click Replace
5. Enter the Instrument and Form for which you are conducting the search. The Form is important because you want to select the official test for the instrument, not a practice test. The Level and Subtest can be left blank.
6. Choose the date range on which you wish to search. Leave scaled score and SPL/GLE blank.
7. Check the box for "Include only those who PASSED and click Apply.

This will return those students who passed the HSE exam in the provided date range.

To search based on data entered into the Diploma/Credentials panel rather than the Assessment data, do the following:

1. Go to the Student grid
2. Click the X Remove Search option to remove any search tiles already in place
3. Click the +Add Search link
4. Click the drop-down arrow and scroll to Diploma Info, then click the triangle to expand those options
5. Locate the field called Diploma/Credential Type. Note that there are TWO identical field names for this. The first one will give you a drop-down list of available diploma/credential types, while

the second one will allow you to type in the diploma/credential types. If you give more than one type of HSE exam, you would typically want to select the second option to allow you to type in your own options.

6. Change the = operator to "in the list"
7. **Type in each type of diploma/credential on which you are searching. Use commas between options but do NOT put spaces after the commas.**
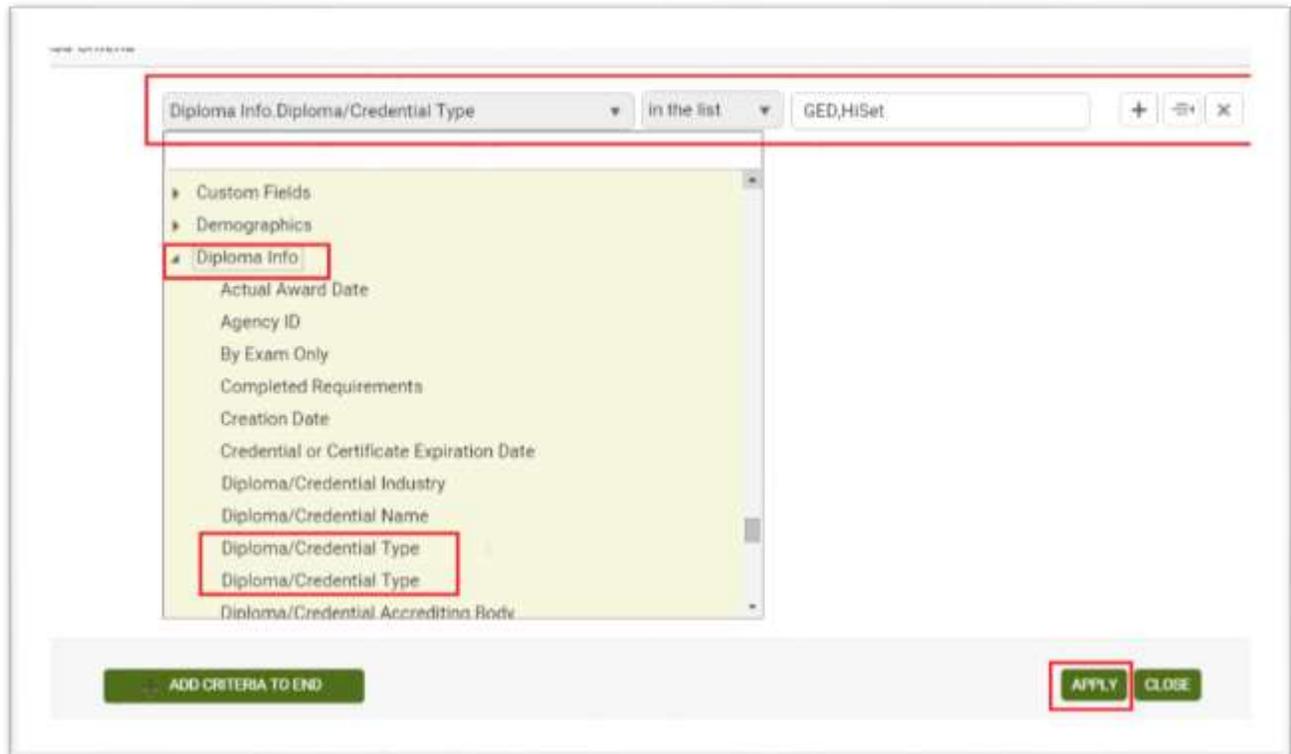
8. Click the + symbol to the right of your criteria.
9. Click the drop-down arrow and scroll to Diploma Info, then click the triangle to expand those options
10. Select Date Earned
11. Change the = operator to >=
12. Enter the start date for the date range on which you are searching

13. Click the grouping symbol operator in the middle of the icons to the right
14. Change the = operator to <=
15. Enter the end date for the date range on which you are searching
16. Click Apply

This will return those students who earned a diploma/credential in the provided date range.

3. **How do we mass enroll tutors into a workshop using the tutor list, only. (We'd like to stop having to search through the entire list of everyone.)**

If you are using a tutor-only type of workshop, it will automatically filter to just tutors. If you are using a volunteer or open workshop type, you can filter the list of potential attendees by role. After clicking the Enroll button and getting the participant list, click the filter icon to the right of the PersonType column heading. Choose "is equal to" "Tutor" and Filter. You can also filter by Intake Date and sort by any of the column headings.

4. How do we import / upload CSV files of data into NextGen?

You currently cannot import files into LACES, only export. We are increasing the amount of functionality related to importing and may make attendance and/or assessment importing available in a future release but it is not currently available except as an add-on component with additional cost.

5. Is there a difference in the number of students with 12 or more hours and how many come up as "fundable?" Marcia asks us to report on the hours, which this past month at our site is 2 more than "fundables" according to NextGen.

Fundable students must have 12 or more hours of instruction, a valid assessment resulting in a valid entry Educational Functioning Level, be 16 years of age or older at intake, and meet all demographic requirements. The easiest way to locate those who have 12 or more hours but are not fundable is to do the following searches:

1. Go to the Student grid
2. With the Current Fiscal Year search tile in place, go to Searches
3. Click the triangle to expand the Hours searches
4. Go to Hours Attended Search, click Add
5. Search for students who have at least 12 hours between 7-1-FY to (today). Leave enrollments and hours type blank and click Apply
6. These are your 12+ hours students. Next:
7. Go back to searches, click the triangle to expand NRS
8. Go to NRS Fundables, click Add
9. When the search results are displayed, click the "And" modifier box between the Hours Attended and NRS Fundables search tiles and change it to "And Not"
10. This will return students who have 12+ hours in the current FY but are not NRS Fundable
11. Check the following:
    a. Assessment Status: Should not be Never Assessed this FY
    b. **Entry Level: Should not be Completed Advanced ESL**
    c. Add the NRS view and check demographic information such as Age, Ethnicity & Gender if the problem isn't solved based on a and/or b
    d. Contact tech support if the problem isn't addressed by any of the above

6. I cannot find a report in NextGen to show students who need a pre-test. The Dashboard shows a different number of students who are "Post Test Eligible by EFL" vs the number when the list is pulled up.

The Dashboard item for Student Alerts: Students eligible for post testing is probably the best search to display students eligible for post-test based purely on hours since last assessment. The Post-Test Eligible by EFL widget breaks the number down by EFL, which isn't always relevant when you just want to know who has enough hours. The Student Alert post-testing indicator only requires one click for the full list.

The Eligible for post testing alert does not take into consideration if they student has already been post-tested or already made a level completion, only if they have enough hours since last assessment to be eligible for another assessment, so it can be useful to pull out those who have already made a gain if you do not want to assess those students again. To do so:

1. Click the +Add Search option to the right of the Dashboard filter tile
2. Scroll to Completed Level
3. Leave = as =
4. Leave the checkbox blank. If you were searching for those who DID make a level completion, you would check this box, but we want to remove people who made a gain, so leaving the box blank will return only those who have NOT completed a level
5. Click Apply

You may also want to apply a view that displays the number of hours since last assessment to verify how many hours they have since their last assessment. To do so, create a view that adds the field called "Instructional Hours Since Last Assessment in Subject Area."

To create a Custom View, go to the "Student List" window under the Menu bar in the upper left corner.
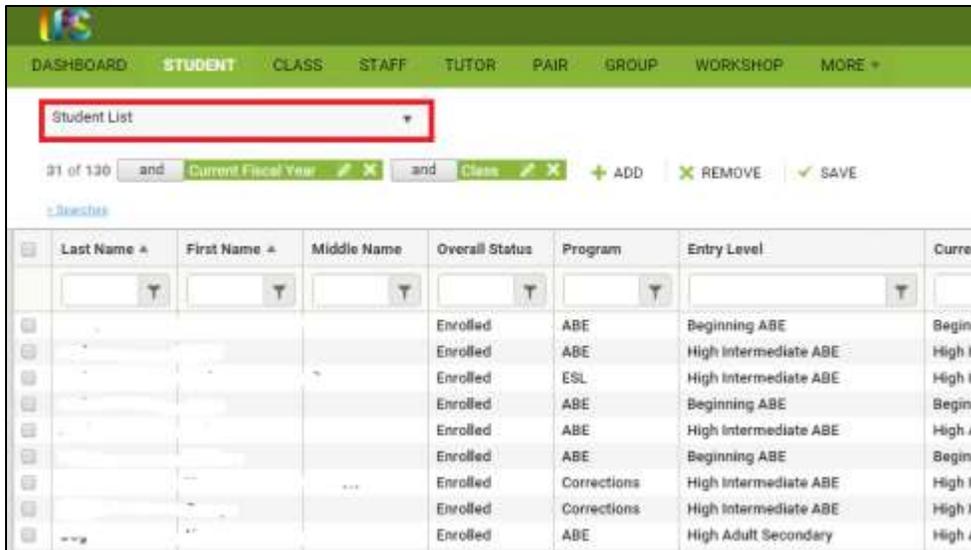
Click the drop-down menu icon and Select "Open View Manager." From here, you can create a new view or modify an existing view. "New" (not recommended) will remove all fields and let you start completely from scratch, while "Copy" (recommended) allows you to start with the fields from the copied view and add or delete fields to create a new view but not have to enter in already present fields such as First and Last Name.
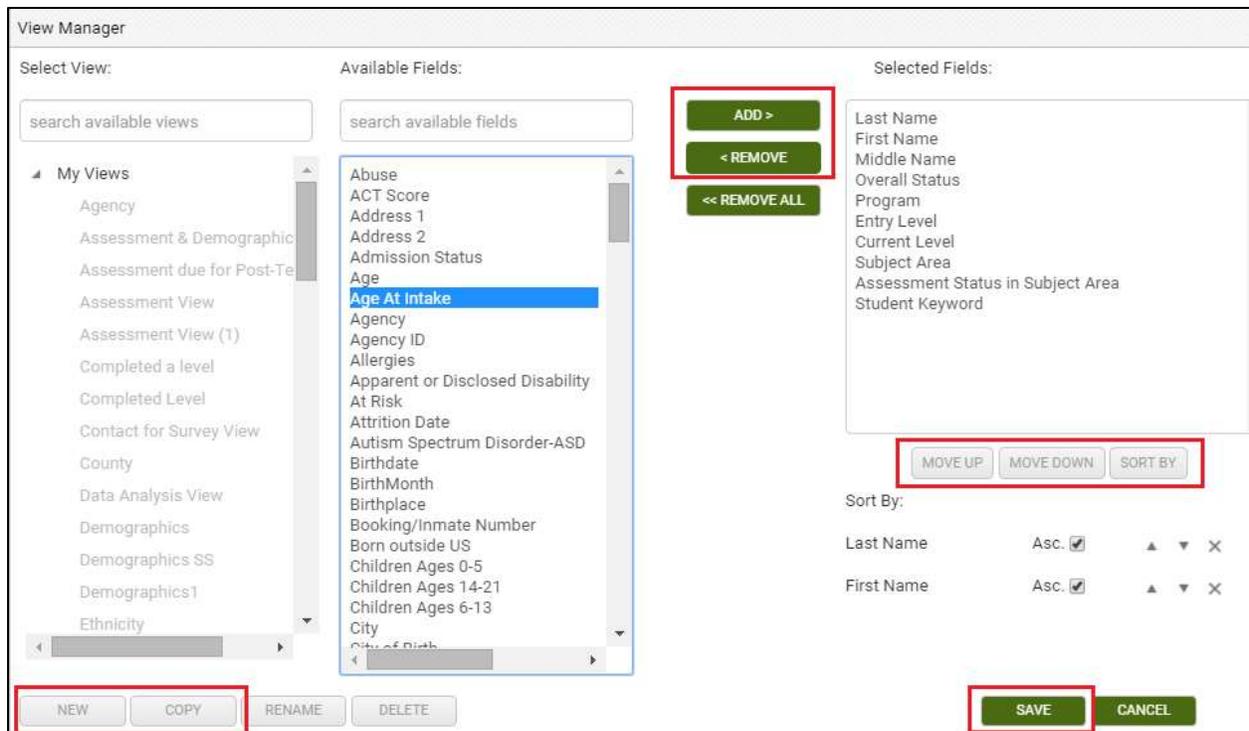
The left-hand column will display your views and shared views. The middle column displays all of the available fields that can be added to your view. In the right-hand column are the fields currently being displayed.

You can add fields by clicking once on the field in the middle column to select it, then clicking the "Add" button." If you are adding multiple fields, you can hold down the CTRL button on the keyboard while making your selections to highlight more than one, and then click Add to add all of them at once. You can remove fields by clicking once on the field in the right-hand column and clicking the "Remove" button. You can also hold down the CTRL button to make multiple selections and click Remove to remove multiple fields at once. Clicking Remove All will remove all of the fields, including Last Name and First Name. You can also change the order in which fields display by clicking the "Move Up" and "Move Down" buttons. Click Save once you have added or removed the fields you want. In this example, we would add the field called "Instructional Hours Since Last Assessment in Subject Area."

Additionally, when creating a custom view, you could select the "Sort By" button to pre-determine the order in which columns sort. The default order is alphabetically by last name, but using the "Sort" function allows you to pre-order multiple columns at a time based on the criteria you choose. Bear in mind that you can also always sort columns into ascending or descending numeric or alphabetical order by double clicking the column heading for ascending order, then clicking once more for descending order.

Custom Views get saved and applied. You can return to the default view by going to the view window again and selecting Student List, or by logging out and back into the database. A saved view can be re-applied at any time by going to the view window>My Views and locating the view by name. If you export or print data with a Custom View applied, the data in your custom view is what will export. You

can make a custom view that you have created into the Default View by clicking in the View manager window and clicking the option at the bottom called Set {created view} as Default.

7. **I do not understand how to use or run the Hours Between Assessments report in NextGen. Without entering every possibility of hours (0-5,000+) the report does not show the data I need for my report.**

The Hours Between Assessment report is intended to search for students who have fewer hours between their assessments than is recommended. For example, if a student must have 50 or more hours between assessments, you would search for those with 49 or fewer to see who *did not* meet the requirement for their assessments. If you want to see how many hours each student has had since their last assessment, or how many hours post-tested students had prior to their their assessments, you would not use this report, but would instead want to apply a view with Instructional Hours Since Last Assessment in Subject Area or Instructional Hours Before Assessment, which you could then export to Excel, if needed.

8. **I'm not sure how to read or use the Diagnostic Search.**

The Student Diagnostic Search is an extremely useful search for identifying issues in student data that can potentially prevent them from accurately populating your NRS tables.

This search is run using summarized, fiscal year data, not raw data, which means you want to run this search after LitPro has run FY summaries, which is automatically done on a monthly basis, or after you have manually run FY summaries for your agency.

To run manual FY summaries, select your Current FY students by going to Searches>Current Fiscal Year>Add. This will return those students who have been active at some in this FY. LACES can only run FY summaries on selections of 200 students or fewer, so if you have more than 200 students in your current FY selection, you'll need to schedule the summaries to be run, or break the selection down to subsets of 200 and run them in groups.

To schedule the summaries, go to More>Create Fiscal Year Summaries. Click the Schedule button in the pop-up window. You can see that the "Create Now" button is inactive, because the selection is larger than 200 students. Click the schedule button to schedule the summaries to be run by LiteracyPro. Generally, it takes 1-2 business days to run summaries. You will be notified via email when the summaries are run, provided your account has a valid email address associated with it.

Once summaries have been run, whether by LiteracyPro automatically, by being scheduled, or manually by you, you are ready to run a Student Diagnostic Search.

Generally speaking, it makes the most sense to run the Diagnostic Search on students who are NRS Participants. This search is intended to locate issues in student records that *would* populate the NRS tables if not for the errors. So, we'll start by going to Searches>Current Fiscal Year>Add, then Searches>NRS Fundables>Add. These are the people who should be populating your NRS tables.

Now, go to Searches>Student Diagnostic Search>Add. Select the program year.

The first category is **Search for Students Using Fiscal Year Data.** The first row indicates students with FY data in the above reporting system. This should match the number of students in your selection, indicating that all students have a FY summary created. If it does not match, look at the results for Students Without FY data in the above reporting system. If there is a number here, click on that number and run a FY summary on the selection. Students without FY data will not populate your FY NRS tables. Student with FY data created before today in the above Reporting System means that the students have a FY summary, but it was created prior to today, meaning some data may not be as up to date as you would like it to be. It is best to run this search with data that has been created very recently.

The next category is **the Search for Students missing Demographic Data in FY Records**, and contains indicators of missing ethnicity/race information or gender information. It is very unlikely that you will see students reported in this section, since LACES required you to enter that data to save the record, but some agencies migrated data from other systems, so it is possible. If you see numbers in this category, click on the number. You will be taken to the list of students missing that data. You can open the record, go to the Demographics panel, edit the record to add the data, and save. Remember that you will need to run a new FY summary after any corrective changes made so that they will be picked up for the search and reporting purposes.

Next is the search for **Students with Missing or Invalid Education Data**. Again, these fields are required for new, incoming students, but students who were prior FY students may have returned and because these fields were not required when they did their initial intake, you may have students missing these fields. Click on the number for students missing Highest Education Level Completed on Entry. You will be taken to the list of students missing that data. Open the first record and go to the Education tab. Click to expand the Education panel. Edit the Highest Education Level Completed on Entry and Highest Education Level Completed on Entry Location fields as needed, then click the Save button in the bottom right hand corner. Run a new FY summary to be sure the updates have been captured.

The Search for **Students with Incorrect or Missing Employment Data** is another search that usually has few to no results, because Employment Status is required on intake. However, again, migrated data may cause issues, as can students returning from prior FYs who had invalid statuses, or incorrect dates that do not correspond to the intake date or are invalid dates. Click on the number for students found with this error, and go to the History>Work History panels to correct any issues. Save, and run a new FY summary.

The Search for **Students whose Age at Intake is Less than 16 or Greater than 99** will locate students who were less than 16 at Intake, as a student must be at least 16 years of age at intake for federal tracking purposes and inclusion on the NRS tables. The Greater than 99 indicator is because usually this is a typographical error. Click on the number for students found with this error, and go to the Demographics>Demographics panels to correct any issues in the Birthdate field. Save, and run a new FY summary.

The Search for **Students with Incorrect Assessment or Level Data** is one of the most common areas to see students reported as having issues. Students with Subject Area in Student Overall Status History not matching current subject area is a common technical support issue. These records are usually caused by assessments that were pushed forward from one year to the next, but the database did not populate a current FY record in the Overall Status History folder. Other issues can be caused if subject areas are

changed after the initial assessment. Because the Overall Status History folder cannot be modified by local users, you will need to contact technical support to have us update these records if you have results in this category, as well as with the Students with Entry Level Student Overall Status History not matching current entry level, which tends to go along with the Subject Area search.

The **Students with incorrect GED levels in FY records** search picks up students who have incorrect data in their FY record. In order to show as having Completed High Adult Secondary they must have an entry level of High Adult Secondary. This usually occurs if the Overall Status History record has no subject area from a non-GED pre-test. If you have numbers here but do NOT have numbers in the NRS Not Reportable row, this may not need to be corrected as long as your NRS tables look accurate. To correct this, contact technical support.

Students with more than one assessment pushed forward in the Reporting Period: LACES allows you to move assessments from one FY to the next by using the "Move Forward" button in the Assessment record. This should be done within the guidelines of the State agency you report to, as well as the test manufacturer's guidelines. However, you should never move more than one assessment forward in the same subject area. If more than one assessment has been pushed forward in the same subject area, those students will show up in this search. To correct the records: Delete extraneous pushed forward assessment records for the new FY. Only one assessment per subject area may be pushed forward (and there is no reason to push forward more than one subject area since the student can only be tracked in one subject area per year for federal reporting purposes.) Run a new FY Summary Record after making corrections to students returned in this search.

The **Students with Current FY Instruction Hours totals not Matching the Recalculated Total** search will bring up any students whose current FY hours totals do not equal the sum of their hours for the Fiscal year summaries. Most often, this is because hours have been added since the most recent FY summary was created. This can be avoided by always waiting to run the Student Diagnostic Search until immediately after summaries have been run. To correct the records: Click on the number of students returned in the Get Results area. Run new FY summaries on these students and then run this search again. If the search is still returning students, contact Tech Support to run an hours recalculation on your data. Run a new summary for any students in this category BEFORE attempting to fix other NRS non-reportable students, as this often clears up non-reportables.

The Search for **Students: Total Not Reportable for NRS** search should be run after all the other data has been cleaned up. If you run this search only on NRS Participants and have no issues in any other areas, you should have no non-reportable students. If you run the search on non-participants, you may find other problems with records that cause them to not be counted that are not included in the other diagnostic searches. To correct those records, you will need to review the records for common issues including a lack of hours or a valid assessment in the current FY. If you cannot determine the problem then send the list to Technical Support for analysis.

9. **Does the "Current Fiscal Year" filter under NRS include non-fundables?**

Yes. Although it is grouped in the NRS searches, not all searches here will filter by NRS fundables- they are just searches that may be important for NRS reporting. The Current Fiscal Year filter looks for any student who has ANY hours this fiscal year, a date of intake in the fiscal year, or an open enrollment record. The Current Fiscal Year filter may return more students than you'll see on the Total Enrolled widget in the Dashboard; this is because the Dashboard filters by students who have 1 or more hours in

the fiscal year and will exclude people with between 0.1 and 1 hour, or who have no hours but a date of intake in the current FY.

10. When looking on the graph for the dashboard widget "Post Test Percentage Rate by EFL Current FY", are the results returned a percentage of the total, or the total?

The results returned are the total *number* of students who made up that percentage of students who did receive a post-test. Eg: If the Post Test Rate shows 60% and you click on the graph and it returns 6 students, then 10 students entered with that Entry EFL and 6 of them were post-tested, resulting in a 60% post-test rate. Post-testing ratios look at all students entering with that EFL, not just NRS participants.

11. Can the view show the Instrument Type column?

The Student custom views cannot display assessment fields because the view can only contain single value, discrete field items, and a student can have multiple assessments, so no. However, if you use the More drop-down in the upper left-hand menu, there is an option called All Assessments. The All Assessments grid will display one row for each assessment for each student and defaults to the current FY assessments. This grid displays the Instrument, Form, and Level columns as part of the default view, and the views here can be modified, as well.
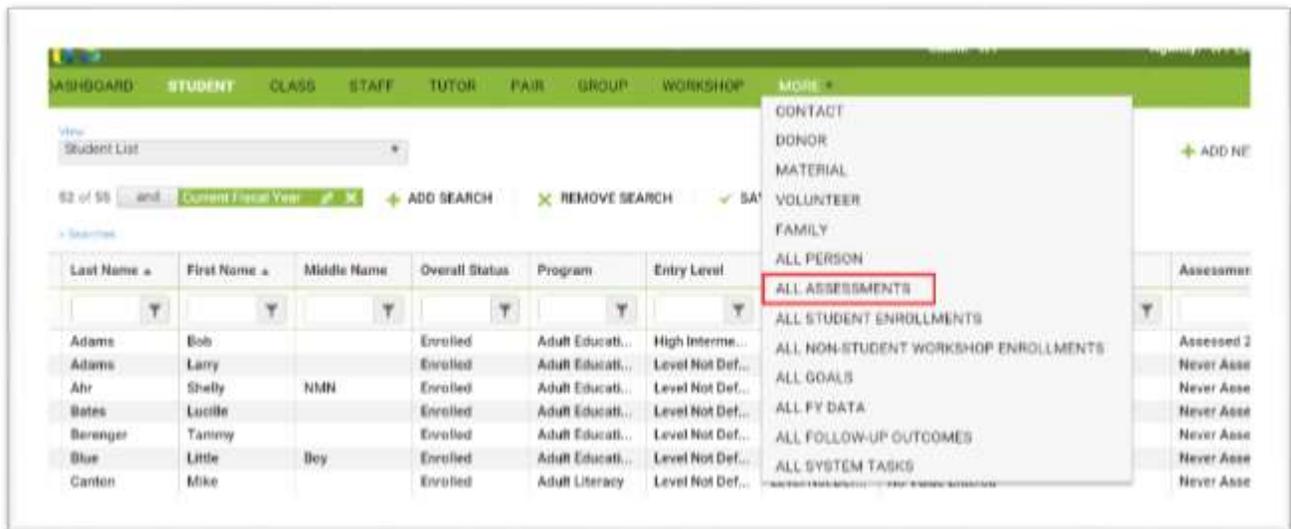
12. The searches seem more complicated in NexGen than they were in LACES, can you explain them in a simple way?

NexGen uses search tiles to indicate what data sets are in place based on the filters used and to allow the data sets to be easily changed. Search tiles are a graphic representation of what filters have been applied to the data set to produce the current selection of records.

The default search tiles will typically be Current Fiscal Year populations for person records and Active populations for instructional settings.

Most search tiles can be edited by clicking the Edit icon (the pencil) or closed/removed by clicking the white X at the far right side of the tile. Some tiles, such as Current Fiscal Year, do not have search parameters that can be changed. If you click on the Edit icon, you will get a message stating that the search contains no parameters.

Search tiles have operators between each tile when more than one tile is in place. **Operators** are simple conjunctions used to combine or exclude terms in a search, resulting in a more focused and productive result. They should save time and effort by eliminating inappropriate results and allowing you to target the exact needed selection within a population.

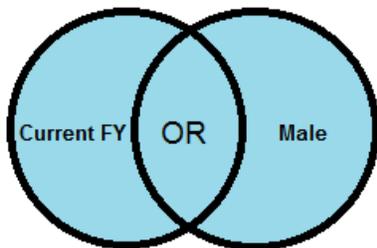The operators used by NexGen are: And, Or, And Not, and Or Not. The default operator is AND.

AND: means that your selection is X out of Y records AND contains those records that meet the criteria contained in the search filter. Multiple search tiles with AND mean that the selection is all of those criteria. Example: 153 of 1470 and Current Fiscal Year AND Gender=Male means that your selection is 153 students because you are filtering by students who are considered current fiscal year students AND whose Gender is Male (and that your total student population is 1470 including prior fiscal year students Note that with ANDs, your selection is usually smaller, because a student must meet **both** tile's criteria to be included in the search results.
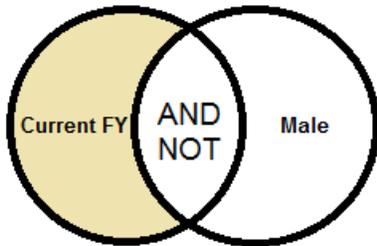
This can be represented graphically like this:
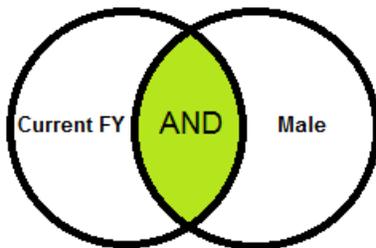
OR: means that your selection is X out of Y records and contains those records that meet the criteria contained in one search tile OR the criteria contained in a different search tile. Example: 911 of 1470 and Current Fiscal Year OR Gender=Male means that your selection is 911 students because you are filtering by students who are considered current fiscal year students OR whose Gender is Male. Notice that this selection is usually larger, because if a student meets **either** of the criteria, they will populate the search results.

This can be represented graphically like this:

AND NOT: means that your selection is X out of Y records and contains those records that do NOT meet the criteria contained in the search filter. Example: 167 of 1470 and Current Fiscal Year AND NOT Gender=Male means that your selection is 167 students because you are filtering by current FY AND NOT including those whose Gender is Male in the current fiscal year. If you had done a search for Current FY AND Gender=Male and then changed the operator to AND NOT, you would expect to see the results be equal to the number of current FY students minus the Male students.

This can be represented graphically like this:

OR NOT: means that your selection is X out of Y records and contain those records that meet the initial search tile criteria **OR** do not meet the next search criteria. Example: 879 of 1470 and Current FY OR NOT Gender=Male means that your selection is 879 students because you are filtering by current fiscal year OR students whose Gender is **not** equal to Male.

This can be represented graphically like this:
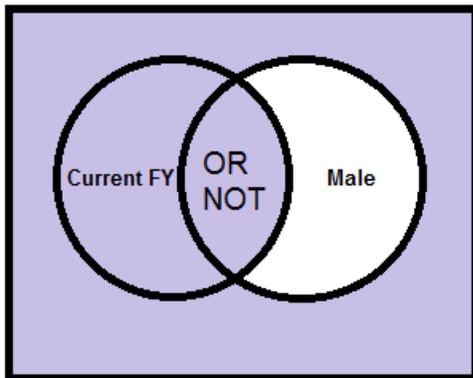
Additional search tiles are added each time an additional search filter is added. Search tiles will be generated by the following:

Predefined Searches:

- Listed under the Searches link to the far left of your grid
- Have pre-defined options for which you provide the criteria
- Give you the option to Add or Replace.
    - Add will add the search to any search tiles already in place.
    - Replace will remove any existing search tiles with only the search you have selected.

The 'Searches' link above the grid will open or close the left pane to display the available predefined and templated searches for that area. The searches display by category and are collapsed by default. To expand a category to show the searches by name, click the arrow in front of the category, then click the search you wish to use.

Predefined searches:
- Runs on the selection as soon as you select the search name.
- Require complex queries that are typically difficult for the user to create. *For example,* the student search 'Posttest Level Lower than Current Level' involves a query that must first find students who have been pre and post tested in a particular subject area, but did **not** advance an EFL, and the posttest EFL is lower than the pretest EFL. This is not a search that can be constructed from the front end of the system.
- Do not have parameters or search criteria that can be changed, even though there is an edit icon on the tile. When you click the edit icon, you will get the message: 'This search contains no parameters.'

Templated searches:
- Allow you to enter specific field search values on a template.
- Allow you to enter as little or as much search criteria as you wish. *For example*, the 'Quick Select' searches are templated searches.

Add and Replace buttons:
- The Add button will add the selected search to the end of any filters or searches already in place.
- The Replace button will remove all existing filters and searches with only the selected search criteria. When searching on prior FY data, it is usually recommended to use Replace, as the default for most grids include a filter for Current Fiscal Year data.

Criteria Builder: (This is the search option resulting from clicking the +Add Search)

- Allows you to create your own searches, from very simple, one field searches to complex searches with multiple pieces of data and grouping.
- You can Add, Remove, and Save criteria.

In-Column Filtering: Every column in a grid provides the opportunity to filter/search within that column. To filter, enter your search criteria in the blank space below the column heading, then click the filter icon. Select the option (Starts with, ends with, contains, Equal to, Not equal to, etc.) and click.

Tips for in-column filtering:

- If you want to filter by something not contained in the current grid, create a custom view that adds that column to your grid in order to be able to filter. Not every field can be added to custom views.
- Spelling matters. Misspelled words and typos typically will result in no records being found.
- Remember that searching using in-column filtering adds an additional search tile to whatever search tiles are already in place. You can remove unwanted search tiles prior to **or** after adding an in-column search by clicking the white X in the unwanted search tile to close it. This is especially important to remember if you are searching for prior fiscal year data, as the default filter for most populations will only include current FY data.
- Filters are not case-sensitive, so capitalization is not necessary and will not affect the results.
- The filter options will be based on the type of data contained in the data field. Some fields will only contain options such as Yes/No, while others will contain longer lists with several options. Read through all available options to determine which is the best choice for your search.

A simple example of in-column filtering:

Filtering by last name: Because Last Name is part of the default view in the student list, simply type the last name, or the first few letters of the last name, into the blank field below Last Name in the column. Click the filter icon to the far right and choose your search option (in this case- Starts With), then click Enter. Notice that the search tiles are displayed to let us know the reason our current selection is 4 students is because we are filtering by two tiles: current fiscal year students AND students whose last name starts with Brown. If we were searching for prior fiscal year students whose last name begins with Brown, we would want to remove the search tile for Current Fiscal Year, and could do so by closing that search tile, by clicking the white X at the far right of the tile.
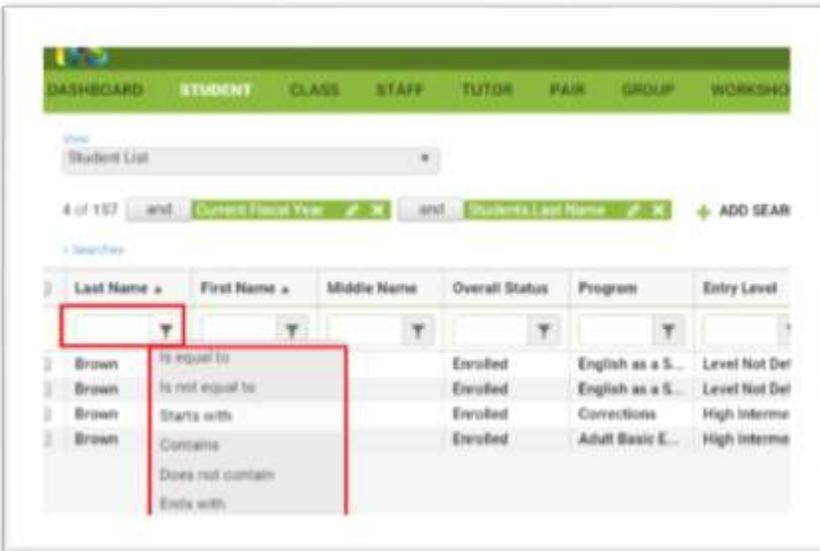
Subsetting:

- Manually selecting and creating a selection of data of your choosing.

Dashboard:

- Clicking on the results of a dashboard widget.

Search Tiles use Operators that allow you to filter the data differently after application of a search tile based on the operator used.