

Create a Simple Query to Find a Group of Records

A query represents a *dynamic* filter. Use a query to search for a group of records one time. If you use the same query criteria again, it might not produce the same list of records. For example, you can perform a general search for a group of students with the same year of graduation. The results of this query will change from year to year.

1. On a list page, such as the Student List, go to **Options > Query**. The New Query pop-up appears:

2. Click **New** to create a new query.
3. Click the **Tables** drop-down 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 to select an operator, such as **Equals**.
6. Type the **Value** you are searching for, such as **2020**.
7. Click **Add** to add the criteria to the **Search criteria** box.
8. If you do not want to search all active students' records, use the **Search based on** drop-down to select another option, such as **All secondary students**.
9. If you're going to use this query often, click **Save As**, give it a name, and select the **Save as filter** checkbox.
10. Click **Search**. The system produces a list of students matching the criteria you entered:

Name	Alerts	Local ID	Gender	Grade Level	QuickStatus	DOB	Primary phone	Address	1st Co
Abreu, Kristyn		22285152	F	09		12/31/1999	(781) 741-3367	962G Spruce St	nikke
Agnant, Jane		25538846	F	09		11/24/1999	(781) 741-8051	97 Janet St	shasa
Alach, Jared		23205840	M	09		1/16/2000	(781) 749-8683	1 Sunset Avenue	amudo
Alarcon, Sophie		22116422	F	09		5/14/2000	(781) 749-5227	2 Penny B4	rpinac
Albanese, Virella		20644653	M	09		12/9/1999	(781) 749-2858	788 Nutmeg C	jbaimo
Albio, Vincent		28343471	M	09		1/31/2000	(781) 749-7748	114 Shady Rest 14-4	rpapet
Allen, Ann		29149451	F	09		7/31/2000	(781) 740-5628	5 Colleen Mary 6	aaiker
Allop, Zoey		29655511	F	09		4/7/2000	(781) 740-2897	82 Valley Terrace B2	ssahib
Anand, Elizabeth		29630772	F	09		11/13/1999	(781) 740-6907	41 Elmwood N	lknqpc
Araujo, Taryn		26869315	F	09		5/7/2000	(781) 740-6401	518G Washington B	cschar
Barbieri, Amy		23127589	F	09		11/6/1999	(781) 740-8378	45 Oak Leaf Village	cdan

Use a Snapshot to Create and Store Groups

A snapshot represents a *static* filter. Use a snapshot to take a picture of a group of records you will need to access regularly or need to save. For example, assume you manage the Math Club and want to be able to quickly access all of its members. You can individually select the students initially, and then create a snapshot of the group. Once you create a snapshot, the group of students in the snapshot doesn't change (although users can modify a snapshot manually).

To create a snapshot:

1. Click the **Student** tab.
2. Search for and select the records you want to include in your snapshot. You might select these records individually, or use a query to narrow your selection.
3. Select the checkbox next to each record you want to include in your snapshot, then go to **Options > Show Selected**.
4. Go to **Options > Snapshots**.
5. In the Manage Snapshots pop-up, click **New**. The Snapshot Definition pop-up appears (at right).
6. Type a **Name** for this snapshot.
7. Click the **Owner** drop-down to select the user, school, or district as the owner. This determines who can use this snapshot.

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

8. If you want to make this snapshot an option on your **Filter** menu , select the **Save as filter** checkbox.
9. If you want this snapshot to be your default filter (such as the records that appear whenever you open the Student List), select the **Move to top of my list** checkbox.
10. 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).
11. If you selected **Snapshot Combination**, determine how to assemble the two snapshots you select:
 - **Union:** Any records that appear in the first snapshot you select *or* the second snapshot you select.
 - **Intersection:** Only records that appear in *both* the first and second snapshot you select.
 - **Difference:** Any record that appears in the first snapshot you select, but not the second.
12. Click **Save**. The Manage Snapshots pop-up displays the snapshot you created.
13. Select the snapshot you created, and click **Use**. The list page displays the records in the snapshot selected.