

# Edit Rules & Workflow

The Edit Rules screen is divided into five tabs: Validation, Linked Fields, Alert Icons, Execute SQL, Workflow Triggers, and SQL Triggers.

The Validation feature is used to define edit rules for Student Fields, Student Enrollment Fields, User Fields and User Permissions Fields. Validations can be utilized to ensure content entered for a student or user adheres to specific client defined business rules. When information is entered that violates a defined validation, an error message will display to the end user. Options allow for validations to act as a warning or prevent saving invalid information.

The Linked Fields tab is used to set up fields that will be updated based on the defined criteria. For example, a rule can be set up so that a student's 504 status is changed from Active to Inactive when a Dismissal Date is entered.

The Alert Icons feature allows for client specific icons that appear next to Student and Users throughout the interface. These icons serve as immediate, easily identifiable flags to end users when a specific Student or User meets defined criteria. For example, an alert icon can be defined for severe allergies, custody alert, etc.

The Execute SQL functionality allows for client defined stored procedures (only MSSQL), SQL statements, or queries to be triggered for a specific Student or User, when defined criteria is changed or met through the interface. (Note: this functionality replaces Student, Student Enrollment, User and User Enrollment plugins from Version 7 and prior. Level 1 training is recommended prior to use.)

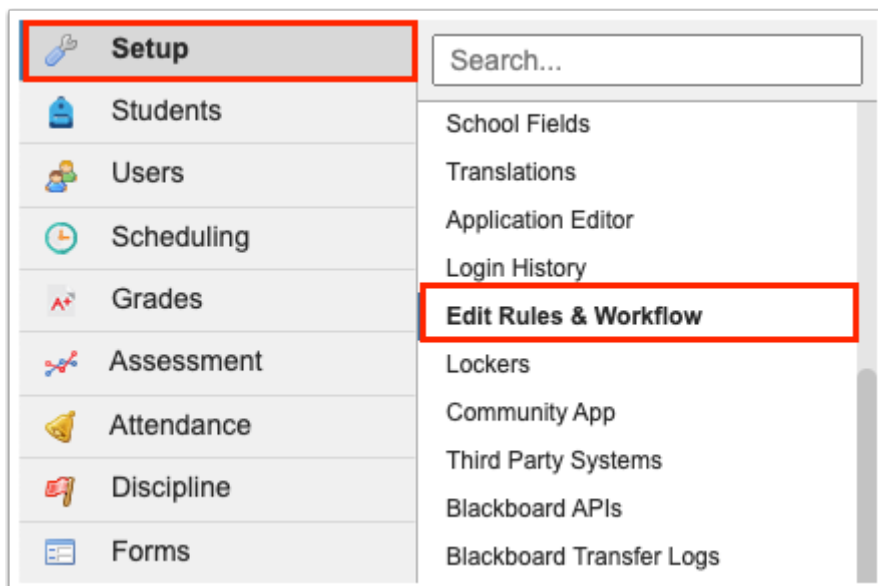
The Workflow Trigger feature includes four basic functions: Generating Emails, Inserting Letters into the Letter Queue, Custom Portal Alerts, and SMS notifications generated from Phone Communication. Each available feature can be setup based upon client defined criteria and execute only when a Student or User record is updated or modified to meet the defined criteria.

The SQL Triggers feature allows users to trigger Positive Behavior Badges to the Student & Parent Portal based on a query tied to attendance, student, grade, schedule, test history scores, or other applicable tables.

# Validation

The Validation feature is used to define edit rules for Student Fields, Student Enrollment Fields, User Fields and User Permissions Fields. Validations can be utilized to ensure content entered for a student or user adheres to specific client defined business rules. When information is entered that violates a defined validation, an error message will display to the end user. Options allow for validations to act as a warning or prevent saving invalid information.

1. In the **Setup** menu, click **Edit Rules & Workflow**.



2. This navigates to Edit Rules & Workflow screen, which defaults to the Validation tab where you have the ability to manage and add edit rules. If another tab is selected, click the **Validation** tab.

Select Student/Staff ▾
Edit Rules & Workflow

Lizette Garcia
Focus High School - 0041 ▾
SIS
2022-2023 ▾
4th 9 Weeks ▾
ERP

Validation
Linked Fields
Alert Icons
Execute SQL
Workflow Triggers
SQL Triggers
Student Fields ▾

Prev
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Next
Export
Filter: OFF

Enabled	Name	Message		
<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/> Prevents Saving	
<input checked="" type="checkbox"/>	IEP Plan Date Must Be Within 1 Year	IEP Plan date must be within one year	<input type="checkbox"/> Prevents Saving	Criteria
<input checked="" type="checkbox"/>	Fed State 60 If Grade Level on the Student Demogr	Fed State 60 If Grade Level on the Student Demographic Inform	<input type="checkbox"/> Prevents Saving	Criteria
<input checked="" type="checkbox"/>	MDT eval date must be within 45 days of the refer	MDT eval date must be within 45 days of the refer date	<input type="checkbox"/> Prevents Saving	Criteria
<input checked="" type="checkbox"/>	Fed State 58 If Grade Level = PK on the matching	Fed State 58 If Grade Level = PK on the matching Student Demc	<input type="checkbox"/> Prevents Saving	Criteria
<input checked="" type="checkbox"/>	Fed State 51 If Grade is KG Immunization Status	Fed State 51 If Grade is KG Immunization Status code must be C	<input type="checkbox"/> Prevents Saving	Criteria
<input checked="" type="checkbox"/>	Fed State 64 If the Immigrant Student = Y, then t	Fed State 64 If the Immigrant Student = Y, then the Country of I	<input type="checkbox"/> Prevents Saving	Criteria
<input checked="" type="checkbox"/>	Fed State 61 If Grade is 07 Immunization Status c	Fed State 61 If Grade is 07 Immunization Status code must be 0	<input type="checkbox"/> Prevents Saving	Criteria
<input checked="" type="checkbox"/>	38.The code for Career Pathways Student Participi	38.The code for Career Pathways Student Participant must be Y	<input type="checkbox"/> Prevents Saving	Criteria

3. Before making any alterations to the Validation tab, be sure to select the correct fields from the pull-down. It defaults to **Student Fields**. The other options include **District Fields**, **User Fields**, **School Fields**, **Discipline Incident Fields**, and **Referral Fields**.

Validation
Linked Fields
Alert Icons
Execute SQL
Workflow Triggers
SQL Triggers

Prev
Page: 1 / 6
Next
Export
Filter: OFF

Enabled	Name	Message		
<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/> Prevents Saving	
<input checked="" type="checkbox"/>	IEP Plan Date must be within one year	IEP Plan date must be within one year	<input type="checkbox"/> Prevents Saving	Criteria
<input checked="" type="checkbox"/>	Fed State 60 If Grade Level on the Student Demogr	Fed State 60 If Grade Level on the Student Demographic Informati	<input type="checkbox"/> Prevents Saving	Criteria
<input checked="" type="checkbox"/>	MDT eval date must be within 45 days of the refer d	MDT eval date must be within 45 days of the refer date	<input type="checkbox"/> Prevents Saving	Criteria

Student Fields ▾
Filter
District Fields
Student Fields
User Fields
School Fields
Discipline Incident Fields
Referral Fields

Any discipline edit rules that are set up now apply to the referrals list as well, not just the referral itself.

4. Enter data in the first row of the table to add a new edit rule.

Validation Linked Fields Alert Icons Execute SQL Workflow Triggers SQL Triggers Student Fields

Page: 1 / 6 Export Filter: OFF

Enabled	Name	Message		
<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/> Prevents Saving	
<input checked="" type="checkbox"/>	IEP Plan Date must be within one year	IEP Plan date must be within one year	<input type="checkbox"/> Prevents Saving	Criteria
<input checked="" type="checkbox"/>	Fed State 60 If Grade Level on the Student Demogr:	Fed State 60 If Grade Level on the Student Demographic Informati	<input type="checkbox"/> Prevents Saving	Criteria
<input checked="" type="checkbox"/>	MDT eval date must be within 45 days of the refer d	MDT eval date must be within 45 days of the refer date	<input type="checkbox"/> Prevents Saving	Criteria
<input checked="" type="checkbox"/>	Fed State 58 If Grade Level = PK on the matching S	Fed State 58 If Grade Level = PK on the matching Student Demogr	<input type="checkbox"/> Prevents Saving	Criteria
<input checked="" type="checkbox"/>	Fed State 51 If Grade is KG Immunization Status co	Fed State 51 If Grade is KG Immunization Status code must be 0, :	<input type="checkbox"/> Prevents Saving	Criteria
<input checked="" type="checkbox"/>	Fed State 64 If the Immigrant Student = Y, then the	Fed State 64 If the Immigrant Student = Y, then the Country of Bir	<input type="checkbox"/> Prevents Saving	Criteria

5. The **Enabled** check box is automatically selected. Clear the check box if you do not want the edit rule to be enforced when you or other users are editing data. This check box is essentially the on/off button.

Validation Linked Fields Alert Icons Execute SQL Workflow Triggers

Page: 1 / 6 Export Filter: OFF

Enabled	Name	Message
<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	IEP Plan Date must be within one year	IEP Plan date must be within one
<input checked="" type="checkbox"/>	Fed State 60 If Grade Level on the Student Demogr:	Fed State 60 If Grade Level on th
<input checked="" type="checkbox"/>	MDT eval date must be within 45 days of the refer d	MDT eval date must be within 45

6. Enter a **Name** for the edit rule, and enter a **Message**. The Name is the error message that displays in the right hand side of the screen in the Errors section, which will include the message entered. The message will display when the edit rule is met either when hovering over the Error of the incorrect field information.

Validation					Student Fields	
<div> <div>Prev</div> <div>Page: 1 / 6</div> <div>Next</div> <div>Export</div> <div>Filter: OFF</div> </div>						
Enabled	Name	Message				
<input checked="" type="checkbox"/>	Race Field Error	At least one race field must be Yes.	<input type="checkbox"/>	Prevents Saving		
<input checked="" type="checkbox"/>	32.If Diploma Type is W06, W6A, W6B, W07, W10, '32.If Diploma Type is W06, W6A, W6B, W07, W10, WFW, WFT, WFA		<input type="checkbox"/>	Prevents Saving	Criteria	
<input checked="" type="checkbox"/>	33.If Certificate of Completion, Type is W08, W8A or 33.If Certificate of Completion, Type is W08, W8A or W09, Grade L		<input type="checkbox"/>	Prevents Saving	Criteria	
<input checked="" type="checkbox"/>	37.Vocational, Single Parent and Single Pregnant W 37.Vocational, Single Parent and Single Pregnant Woman code mus		<input type="checkbox"/>	Prevents Saving	Criteria	
<input checked="" type="checkbox"/>	38.The code for Career Pathways Student Participan 38.The code for Career Pathways Student Participant must be Y or		<input type="checkbox"/>	Prevents Saving	Criteria	
<input checked="" type="checkbox"/>	3C.If Diploma Type is W43, W45 or W52, Grade Lev 3C.If Diploma Type is W43, W45 or W52, Grade Level must be 30 c		<input type="checkbox"/>	Prevents Saving	Criteria	
<input type="checkbox"/>	30 and 55.If Grade Level equals PK-8 or 09-11, thei 30 and 55.If Grade Level equals PK-8 or 09-11, then Postsecondar		<input type="checkbox"/>	Prevents Saving	Criteria	

General Demographics

Print a Form/Let

At least one race field must be Yes.

Personal Student Email

charlieabe@gmail.com

\* Single Ethnicity

Hispanic

\* Ethnicity: Hispanic or Latino

No

\* Race: White

No

\* Race: Black or African Ameri...

No

\* Race: Asian

No

\* Race: American Indian or Al...

No

\* Race: Native Hawaiian or Ot...

No

\* Primary Lang Spoken in the ...

Spanish [SP]

Secondary Lang Used

Not Applicable [ZZ]

Report Card Language

Language Info

\* Primary Student Language

English [EN]

\* Home Language Survey Date

08/15/2018

! Race Field Error

7. The **Prevents Saving** check box is selected by default to prevent any user with access to the field from saving the record if the edit rule is met. Clear the selected check box to allow users to save the record when there is an error. If you are unable to save, the Save button will be gray and inactive. In the image provided, Prevents Saving has been disabled, and you can save the data regardless of the error.

Validation				Linked Fields	Alert Icons	Execute SQL	Workflow Triggers	SQL Triggers	Student Fields
< Prev    Page: 5 / 6    Next >    Export    Filter: OFF									
Enabled	Name	Message							
<input checked="" type="checkbox"/>	Race Field Error	At least one race field must be Yes.	<input type="checkbox"/> Prevents Saving						
<input checked="" type="checkbox"/>	ELL 11 English Language Learners Reevaluation Dat	ELL 11 English Language Learners Reevaluation Date must be num	<input type="checkbox"/> Prevents Saving	Criteria					
<input checked="" type="checkbox"/>	ELL 10 English Language Learners Exit Date must b	ELL 10 English Language Learners Exit Date must be numeric and i	<input type="checkbox"/> Prevents Saving	Criteria					
<input checked="" type="checkbox"/>	DJJ Zoned School Requirement	DJJ Zoned School Requirement	<input checked="" type="checkbox"/> Prevents Saving	Criteria					
<input checked="" type="checkbox"/>	Date Field cannot be saved as a future date.	Date Field cannot be saved as a future date.	<input checked="" type="checkbox"/> Prevents Saving	Criteria					
<input checked="" type="checkbox"/>	Codes for E09 prior district must be 99, with prior st	Codes for E09 prior district must be 99, with prior state ZZ, and Pri	<input checked="" type="checkbox"/> Prevents Saving	Criteria					
<input checked="" type="checkbox"/>	Codes for E02 must be valid FL district, with state FI	Codes for E02 must be valid FL district, with state FL and Country I	<input checked="" type="checkbox"/> Prevents Saving	Criteria					

Abe, Charlie Noel
 

x

Student Info
 

Lizette Garcia

Focus High School - 0041
 

SIS

2022-2023
 

4th 9 Weeks

ERP

Enrollment
 Schedule
 Requests
 Grades
 Absences
 Activities
 Referrals
 Test History
 Audit Trail
 Grad

ISP Page
 Files
 SSS
 Choice
 Billing

Filter fields...
 

PI Primary Info
 5 504
 A Address
 Addresses & Contacts
 AN Admin Notes
 AC Application Courses
 A Athletics
 BS Behavior Screening
 C Classified
 Controlled School Choice

General Demographics
 Print a Form/Letter

Personal Student Email: charlieabe@gmail.com
 

\* Single Ethnicity: Hispanic

\* Ethnicity: Hispanic or Latino
 ☒ No
 ☐ Yes

\* Race: White
 ☒ No
 ☐ Yes

\* Race: Black or African American
 ☒ No
 ☐ Yes

\* Race: Asian
 ☒ No
 ☐ Yes

\* Race: American Indian or Alaska Native
 ☒ No
 ☐ Yes

\* Race: Native Hawaiian or Other Pacific Islander
 ☒ No
 ☐ Yes

\* Primary Lang Spoken in the Home
 Spanish [SP]

At least one race field must be Yes.

⚠ If **Prevents Saving** is selected, all changed data will not be saved if you or other users violate one rule on the screen until it is fixed.

8. Press the **Enter** key to add the rule. The line will turn blue when it has been added. The information here is auto-saved; there is no save button on this screen. A delete button (red minus sign) will appear along with a Criteria button.

Validation

Linked Fields

Alert Icons

Execute SQL

Workflow Triggers

SQL Triggers

Student Fields

Prev

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Next

Export

Filter: OFF

	Enabled	Name	Message		
	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/> Prevents Saving	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Race Field Error	At least one Race field must be set to Yes.	<input checked="" type="checkbox"/> Prevents Saving	Criteria
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	IEP Plan Date must be within one year	IEP Plan date must be within one year	<input type="checkbox"/> Prevents Saving	Criteria
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Fed State 60 If Grade Level on the Student Demogr	Fed State 60 If Grade Level on the Student Demographic Informati	<input type="checkbox"/> Prevents Saving	Criteria
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	MDT eval date must be within 45 days of the refer d	MDT eval date must be within 45 days of the refer date	<input type="checkbox"/> Prevents Saving	Criteria
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Fed State 58 If Grade Level = PK on the matching S	Fed State 58 If Grade Level = PK on the matching Student Demogr	<input type="checkbox"/> Prevents Saving	Criteria

9. Click **Criteria** next to the edit rule. When selected, a criteria pop-up window displays. This is where you will set up the criteria that will trigger an error for the field. I.e. What is the violation; what should make this warning message/error message display? Multiple criteria can be set up. Criteria can be set up by selecting fields and entering values in the table at the top of the criteria window or by entering a query in the Match Query section at the bottom of the window.

Validation					Student Fields			
Linked Fields		Alert Icons		Execute SQL	Workflow Triggers			
SQL Triggers								
Prev		Page						
<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/> Prevents Saving				
<input checked="" type="checkbox"/>	Race			<input checked="" type="checkbox"/> Prevents Saving	Criteria			
<input checked="" type="checkbox"/>	IEP			<input type="checkbox"/> Prevents Saving	Criteria			
<input checked="" type="checkbox"/>	Fed			<input type="checkbox"/> Prevents Saving	Criteria			
<input checked="" type="checkbox"/>	MDT			<input type="checkbox"/> Prevents Saving	Criteria			
<input checked="" type="checkbox"/>	Fed			<input type="checkbox"/> Prevents Saving	Criteria			
<input checked="" type="checkbox"/>	Fed			<input type="checkbox"/> Prevents Saving	Criteria			
<input checked="" type="checkbox"/>	Fed			<input type="checkbox"/> Prevents Saving	Criteria			
<input checked="" type="checkbox"/>	Fed			<input type="checkbox"/> Prevents Saving	Criteria			
<input checked="" type="checkbox"/>	Fed			<input type="checkbox"/> Prevents Saving	Criteria			
<input checked="" type="checkbox"/>	38.T			<input type="checkbox"/> Prevents Saving	Criteria			
<input checked="" type="checkbox"/>	37.V			<input type="checkbox"/> Prevents Saving	Criteria			
<input checked="" type="checkbox"/>	If E			<input type="checkbox"/> Prevents Saving	Criteria			
<input checked="" type="checkbox"/>	ELL			<input type="checkbox"/> Prevents Saving	Criteria			

### Criteria for Race Field Error

AT LEAST ONE RACE FIELD MUST BE SET TO YES.

Criteria Match Any ☐

Field	On Change	Not	Value
"Registrar Notes"; Registrar N...	<input type="checkbox"/>	<input type="checkbox"/>	

Match Query

This query must select a single column aliased as `student_id`. If this is set, a student will only match this rule if it matches the criteria and its `student_id` is included in the results.

Valid replacements are `{date}`, `{school_id}`, `{year}`, `{marking_period_id}`, and `{current_staff_id}`.

Done

[Back to Student List](#)
[Back to User List](#)
[Print](#)
[Messenger](#)
[Help](#)
[Logout](#)

**i** If more than one row of Criteria is added, it will be computed as an AND. However, if the "Match Any" check box is selected, the rows will be computed as OR.

10. Select the **Field** to consider. Note: The fields available here are largely student and student enrollment fields; address fields are not available here.

Writers02

Criteria for Race Field Error

AT LEAST ONE RACE FIELD MUST BE SET TO YES.

Criteria

Match Any ☐

Field	On Change	Not	Value
General Registration: Race: A...	<input type="checkbox"/>	<input type="checkbox"/>	

Filter

General Registration: Race: Asian  
General Registration: Race: Black or African American  
General Registration: Race: Native Hawaiian or Other Pacific Islander  
General Registration: Race: White  
General Registration: Residence County  
General Registration: Residency for one year or more?  
General Registration: Resident Status  
General Registration: Student Email Address  
Gifted: Has Characteristics Checklist for Superior Students  
Gifted: Has ESE Referral Form

Done

**11.** For the edit rule to take effect upon data/fields being changed, select the **On Change** check box. Selecting the On Change check box at this point will display the error name and message to any user that makes a change to the Race: Asian field. Notice the Not and Value fields are no longer active on this screen. To add a rule or process to take effect upon the Field: Asian being changed, use the Match Query section explained in step 15.

Criteria for Race Field Error

AT LEAST ONE RACE FIELD MUST BE SET TO YES.

Criteria

Match Any ☐

Field	On Change	Not	Value
General Registration: Race: A...	<input checked="" type="checkbox"/>		

Match Query

**12.** Select the **Not** check box to enforce the edit rule if the field selected is Not the Value entered. In this example, if the Race: Asian field is Not Y (yes / selected), enforce this edit rule/ error.



## Criteria for Race Field Error

AT LEAST ONE RACE FIELD MUST BE SET TO YES.

### Criteria

Match Any ☐

Field	On Change	Not	Value
General Registration: Race: A... <input type="button" value="v"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Yes <input type="button" value="v"/>

### Match Query

ISP Page Files SSS Choice Billing

☰

☐

☐

☐

General Demographics

Personal Student Email

charlieade@gmail.com

\* Single Ethnicity

Hispanic

\* Ethnicity: Hispanic or Latino

☒ No ☐ Yes

\* Race: White

☒ No ☐ Yes

\* Race: Black or African American

☒ No ☐ Yes

\* Race: Asian

No

\* Race: American Indian or Alaska Native

☒ No ☐ Yes

\* Race: Native Hawaiian or Other Pacific Islander

No

\* Primary Lang Spoken in the Home

Spanish [SP]

Print a Form/Letter

At least one race field must be Yes.

At least one race field must be Yes.

**13.** Enter the field **Value** that will trigger the error. For select fields, a list of allowable options will display for selection.

## Criteria for Race Field Error

AT LEAST ONE RACE FIELD MUST BE SET TO YES.

### Criteria

Match Any ☐

	Field	On Change	Not	Value
	*Registrar Notes*: Registrar N... ▼	<input type="checkbox"/>	<input type="checkbox"/>	
+	General Registration: Race: A... ▼	<input type="checkbox"/>	<input type="checkbox"/>	**Empty**, No ▼

### Match Query

a. For date fields, such as birthdate, clicking the Value field opens the Date Criteria pop-up window to define the date criteria. Enter the corresponding information, and then click **Save**.

### Criteria

Match Any ☐

#### Date Criteria

Empty

OR

Prior to ▼ 0 day(s) ▼ before ▼ (Today) ▼

OR

Between: mm/dd/yyyy ☐ and mm/dd/yyyy ☐

Save

Cancel



Edit rules on text fields will be hard to enforce since the value must match exactly to trigger the error.

14. When complete, press **Enter** to save the data. Upon saving the line turns blue.

## Criteria for Race Field Error

AT LEAST ONE RACE FIELD MUST BE SET TO YES.

### Criteria

Match Any ☐

	Field	On Change	Not	Value
	*Registrar Notes*: Registrar N... ▼	<input type="checkbox"/>	<input type="checkbox"/>	
■	General Registration: Race: A... ▼	<input type="checkbox"/>	<input type="checkbox"/>	**Empty**, No ▼

### Match Query

**15.** Instead of defining criteria by selecting fields and defining the values, a query can be entered in the **Match Query** section of the Criteria window. Requirements for the query are indicated in the yellow box.

### Match Query

This query must select a single column aliased as `student_id`. If this is set, a student will only match this rule if it matches the criteria and its `student_id` is included in the results.

Valid replacements are `{date}`, `{school_id}`, `{year}`, and `{marking_period_id}`.

```
SELECT
  s.student_id
FROM
  students s JOIN
  student_enrollment se ON
    se.student_id = s.student_id
WHERE
```

Done

The following is the example Match Query shown for Multiple Active Enrollments:

```

1 SELECT
2     s.student_id
3 FROM
4     students s JOIN
5     student_enrollment se ON
6     se.student_id = s.student_id
7 WHERE
8     -- Remove this to evaluate all school years
9     se.year = {year} AND
10    (
11        se.start_date <= CAST({date} AS DATE) AND
12        (se.end_date IS NULL OR se.end_date >= CAST({date} AS
13            DATE))
14    )
15 GROUP BY
16     s.student_id,
17     se.year
18 HAVING
19     -- The total number of active enrollment records minus
20     COUNT(*) -
21     -- The number of 'Second School' active enrollment records
22     SUM(CASE WHEN se.custom_9 = 'Y' THEN 1 ELSE 0 END) !=
23     -- Should equal exactly 1
24     1

```

16. Select the **Match Any** check box to apply the following conditions: The edit rule is met when any of the criteria is matched instead of having to match all of the criteria (each row of criteria is an “or” statement). When the check box is not selected, each row of criteria is an “and” statement.

### Criteria for Race Field Error

AT LEAST ONE RACE FIELD MUST BE SET TO YES.

Match if the student meets *\*any\** of the criteria, rather than *\*all\**

Match Any ☐

Field	On Change	Not	Value
*Registrar Notes*: Registrar N...	<input type="checkbox"/>	<input type="checkbox"/>	**Empty**
General Registration: Race: W...	<input type="checkbox"/>	<input type="checkbox"/>	**Empty**, No
General Registration: Race: A...	<input type="checkbox"/>	<input type="checkbox"/>	**Empty**, No

17. Add as many rows of criteria, as needed. When all information has been entered/selected, click **Done** at the bottom of the Criteria pop-up to return to the Validation tab.

## Criteria for Race Field Error

AT LEAST ONE RACE FIELD MUST BE SET TO YES.

### Criteria

Match Any ☐

Field	On Change	Not	Value
"Registrar Notes": Registrar N...	<input type="checkbox"/>	<input type="checkbox"/>	**Empty**
General Registration: Race: A...	<input type="checkbox"/>	<input type="checkbox"/>	**Empty**, No
General Registration: Race: N...	<input type="checkbox"/>	<input type="checkbox"/>	**Empty**, No
General Registration: Race: Bl...	<input type="checkbox"/>	<input type="checkbox"/>	**Empty**, No
General Registration: Race: W...	<input type="checkbox"/>	<input type="checkbox"/>	**Empty**, No
General Registration: Race: A...	<input type="checkbox"/>	<input type="checkbox"/>	**Empty**, No

### Match Query

This query must select a single column aliased as `student_id`. If this is set, a student will only match this rule if it matches the criteria and its `student_id` is included in the results.

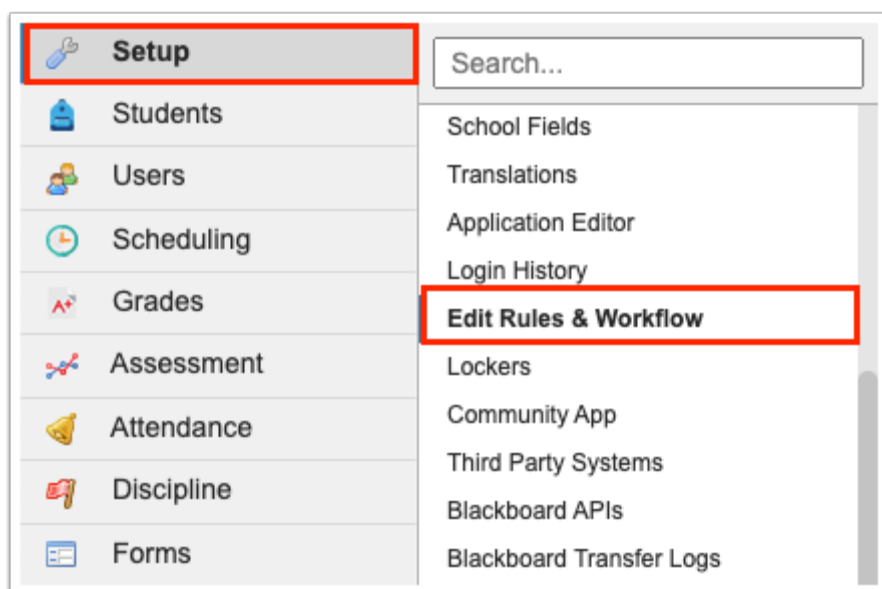
Valid replacements are `{date}`, `{school_id}`, `{year}`, `{marking_period_id}`, and `{current_staff_id}`.

Done

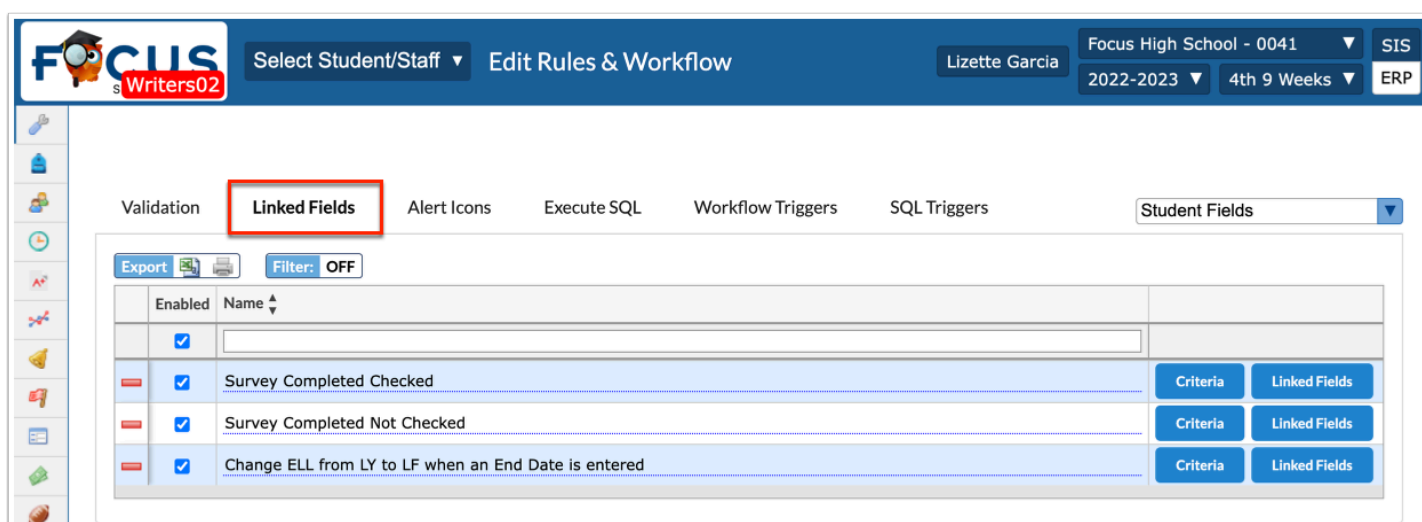
## Linked Fields

The Linked Fields tab is used to set up fields that will be updated based on the defined criteria. For example, a rule can be set up so that a student's 504 status is changed from Active to Inactive when a Dismissal Date is entered.

1. In the **Setup** menu, click **Edit Rules & Workflow**.







2. Click the **Linked Fields** tab to begin linking one field to another. This module can be utilized if one field is changed that directly affects another field.



3. Before making any alterations to the Linked Fields tab, be sure to select the correct fields from the pull-down. It defaults to **Student Fields**. The other options include **District Fields**, **User Fields**, **School Fields**, **Discipline Incident Fields**, and **Referral Fields**.


Validation **Linked Fields** Alert Icons Execute SQL Workflow Triggers SQL Triggers

Export   Filter: OFF

	Enabled	Name
	<input checked="" type="checkbox"/>	
	<input checked="" type="checkbox"/>	Survey Completed Checked
	<input checked="" type="checkbox"/>	Survey Completed Not Checked



Student Fields ▼  
Filter  
District Fields  
**Student Fields**  
User Fields  
School Fields  
Discipline Incident Fields  
Referral Fields



Criteria Linked Fields

 Any discipline edit rules that are set up now apply to the referrals list as well, not just the referral itself.

4. Use the first row in the table to add a new linked field.

Validation **Linked Fields** Alert Icons Execute SQL Workflow Triggers SQL Triggers Student Fields ▼

Export   Filter: OFF



	Enabled	Name
	<input checked="" type="checkbox"/>	
	<input checked="" type="checkbox"/>	Survey Completed Checked
	<input checked="" type="checkbox"/>	Survey Completed Not Checked



Criteria Linked Fields

Criteria Linked Fields

5. The **Enabled** check box is automatically selected. Clear the check box if you do not want the linked fields rule to be enabled.

Validation **Linked Fields** Alert Icons Execute SQL Workflow Triggers

Export   Filter: OFF

	Enabled	Name
	<input checked="" type="checkbox"/>	
	<input checked="" type="checkbox"/>	Survey Completed Checked
	<input checked="" type="checkbox"/>	Survey Completed Not Checked

6. Enter a **Name** for the linked fields rule.

Export

Filter: OFF

Enabled	Name	
<input checked="" type="checkbox"/>	Change ELL from LY to LF when an End Date is entered	
<input checked="" type="checkbox"/>	Survey Completed Checked	<div>CriteriaLinked Fields</div>
<input checked="" type="checkbox"/>	Survey Completed Not Checked	<div>CriteriaLinked Fields</div>

7. Press the **Enter** key to add the rule. The line turns blue when it has been added. The information here is auto-saved; there is no save button on this screen.

Export

Filter: OFF

Enabled	Name	
<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	Change ELL from LY to LF when an End Date is entered	<div>CriteriaLinked Fields</div>
<input checked="" type="checkbox"/>	Survey Completed Checked	<div>CriteriaLinked Fields</div>
<input checked="" type="checkbox"/>	Survey Completed Not Checked	<div>CriteriaLinked Fields</div>

8. Click **Criteria** next to the rule to set the specifics of the rule. When selected, a criteria pop-up window displays. This is where you will set up the criteria that will trigger one field to change the other. Criteria can be set up by selecting fields and entering values in the table at the top of the criteria window or by entering a query in the Match Query section at the bottom of the screen.

Validation

Linked Fields

Alert Icons

Execute SQL

Workflow Triggers

SQL Triggers

Student Fields

Export

Filter: OFF

Enabled	Name	
<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	Change ELL from LY to LF when an End Date is entered	<div>CriteriaLinked Fields</div>
<input checked="" type="checkbox"/>	Survey Completed Checked	<div>CriteriaLinked Fields</div>
<input checked="" type="checkbox"/>	Survey Completed Not Checked	<div>CriteriaLinked Fields</div>



### Criteria for Change ELL from LY to LF when an End Date is entered

Criteria Match Any ☐

Field	On Change	Not	Value
*Registrar Notes*: Registrar N...	<input type="checkbox"/>	<input type="checkbox"/>	

Match Query

This query must select a single column aliased as `student_id`. If this is set, a student will only match this rule if it matches the criteria and its `student_id` is included in the results.

Valid replacements are `{date}`, `{school_id}`, `{year}`, `{marking_period_id}`, and `{current_staff_id}`.

9. Select the **Field** to consider from the pull-down. Note: The fields available here are largely student and student enrollment fields; address fields are not available here.

### Criteria for Change ELL from LY to LF when an End Date is entered

Criteria Match Any ☐

Field	On Change	Not	Value
ELL: ELL LY Exit Date	<input type="checkbox"/>	<input type="checkbox"/>	Empty

Filter

- ELL: ELL LY Exit Date
- ELL: ELL Program Participant
- ELL: English Language Learner
- ELL: English Language Learners: Tier Placement
- ELL: Extension of Instruction
- ELL: First Basis of Exit
- ELL: First Monitor Date
- ELL: First Monitor Status
- ELL: Fourth Monitor Date
- ELL: Fourth Monitor Status

10. For the rule to take effect upon data/fields being changed, select the **On Change** check box. Selecting the On Change check box at this point will trigger the linked field to change. To add a

rule or process to take effect upon the ELL LY Exit Date being changed, use the Match Query section explained in step 14.

### Criteria for Change ELL from LY to LF when an End Date is entered

Criteria

Match Any ☐

Field	On Change	Not	Value
ELL: ELL LY Exit Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Match Query

11. Select the **Not** check box to enforce the rule if the field selected is Not the Value entered. In the example, shown the rule will be enforced if the ELL LY Exit Date is NOT Empty.

Criteria

Match Any ☐

Field	On Change	Not	Value
ELL: ELL LY Exit Date	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Empty

a. For date fields, such as birthdate, clicking the Value field opens the Date Criteria pop-up window to define the date criteria. Enter the corresponding information, and then click **Save**.

Date Criteria

Empty

OR

Prior to  day(s)  (Today)

OR

Between:  and

Save

or

Cancel

12. Enter the field **Value** that will trigger the rule. For select fields, a list of allowable options will display for selection. In the example shown specific Value(s) that pertain to an ELL Exit Date are shown.

Field	On Change	Not	Value
ELL: English Language Learner	<input type="checkbox"/>	<input type="checkbox"/>	
ELL: ELL Exit Date	<input type="checkbox"/>	<input checked="" type="checkbox"/>	


**Match Query**

This query must select a single column aliased as **student** criteria and its **student\_id** is included in the results.

Valid replacements are **{date}** , **{school\_id}** , **{year}**

**Filter**  
[Check all visible](#) [Clear selected](#)

- ☐ \*\*Empty\*\*
- ☐ Exited after two year followup Also applies to John M. McKay Scholarship stu...
- ☐ K-12 tested or pending [LP]
- ☒ LEP in LEP classes [LY]
- ☐ Not applicable [ZZ]
- ☐ Two year followup [LF]

 Rules on text fields will be hard to enforce since the value must match exactly to trigger the change.

13. When complete, press the **Enter** key to save the data. Upon saving the line turns blue.

14. Instead of defining criteria by selecting fields and defining the values, a query can be entered in the **Match Query** section of the Criteria window. Requirements for the query are indicated in the yellow box.

**Match Query**

This query must select a single column aliased as **student\_id** . If this is set, a student will only match this rule if it matches the criteria and its **student\_id** is included in the results.

Valid replacements are **{date}** , **{school\_id}** , **{year}** , and **{marking\_period\_id}** .

15. Select the **Match Any** check box to apply the following conditions: The edit rule is met when any of the criteria is matched instead of having to match all of the criteria (each row of criteria is an “or” statement). When the check box is not selected, each row of criteria is an “and” statement.

## Criteria for Change ELL from LY to LF when an End Date is Entered

Match if the student meets \*any\* of the criteria, rather than \*all\*

Criteria


Match Any 




**16.** When all information has been entered/selected, click **Done** at the bottom of the Criteria pop-up to return to the Linked Fields tab.

Done

**17.** Click **Linked Fields** next to the rule and the Criteria button.

Validation **Linked Fields** Alert Icons Execute SQL Workflow Triggers SQL Triggers Student Fields ▼

Export  Filter: OFF

	Enabled	Name		
	<input checked="" type="checkbox"/>			
	<input checked="" type="checkbox"/>	Change ELL from LY to LF when an End Date is entered	Criteria	<b>Linked Fields</b>
	<input checked="" type="checkbox"/>	Survey Completed Checked	Criteria	Linked Fields
	<input checked="" type="checkbox"/>	Survey Completed Not Checked	Criteria	Linked Fields

**18.** The Linked Fields pop-up window displays. This is where you will select the linked field(s) that will be updated when the criteria is met and define the value that will populate the field(s). Multiple linked fields can be set up.

## Linked Fields for Change ELL from LY to LF when an End Date is entered

At least one row is required for this rule to be evaluated

Field	Value
ELL: English Language Learner ▼	▼

Done

**19.** Select the **Field** that will be updated from the pull-down. Note: The fields available here are largely student and student enrollment fields; address fields are not available here.

## Linked Fields for Change ELL from LY to LF when an End Date is entered

At least one row is required for this rule to be evaluated

Field	Value
ELL: English Language Learner ▼	Two year followup [LF] ▼

Done

**20.** Enter the **Value** that will populate the field. For select fields, a list of allowable options will display for selection.

**21.** Press the **Enter** key to add the linked field. The line turns blue when it has been added. The information here is auto-saved; there is no save button on this screen.

## Linked Fields for Change ELL from LY to LF when an End Date is entered

At least one row is required for this rule to be evaluated

Field	Value
*Registrar Notes*: Registrar N...	**Empty**
ELL: English Language Learner	Two year followup [LF]

Done

22. Add additional linked fields, if needed. Click **Done** to return to the Linked Fields tab.



Once you click **Done**, the linked fields rule is in effect. You will not receive a warning that data is being changed. The Student [Audit Trail](#) will show the user who triggered the linked field to update. Please use this feature with caution.

In the example below for the linked fields rule **Change ELL from LY to LF when End Date is entered**, notice the user who entered an ELL Exit Date for the student is recorded as the user who changed the student's LEP Student status from LY to LF in the Student Audit Trail.

Student: Acosta, Harry P (005...) Editing User: From Date: To Date: Submit

**Student** Enrollment Report Card Grades Address Contacts Referrals Attendance School Choice Legacy

Export

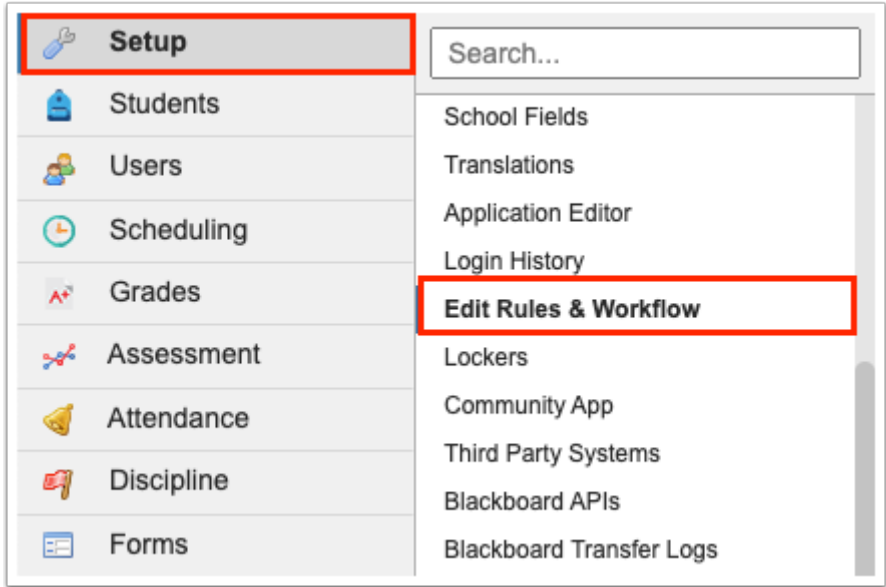
Filter: OFF

Date	Editing User	Student	IP	Form	Log Table	Action	Changes									
07/15/2022 10:53:05	Garcia, Lizette	Acosta, Harry P	47.204.130.247			UPDATE	<table> <tr> <th></th> <th>Updated By</th> <th>English Language Learner</th> </tr> <tr> <td>Before</td> <td>27392</td> <td>LEP in LEP classes [LY]</td> </tr> <tr> <td>After</td> <td>27392</td> <td>Two year followup [LF]</td> </tr> </table>		Updated By	English Language Learner	Before	27392	LEP in LEP classes [LY]	After	27392	Two year followup [LF]
	Updated By	English Language Learner														
Before	27392	LEP in LEP classes [LY]														
After	27392	Two year followup [LF]														
07/15/2022 10:53:04	Garcia, Lizette	Acosta, Harry P	47.204.130.247			UPDATE	<table> <tr> <th></th> <th>Updated By</th> <th>English Language Learner</th> </tr> <tr> <td>Before</td> <td>27392</td> <td>The student is one who has been exited from the ESOL program</td> </tr> <tr> <td>After</td> <td>27392</td> <td>LEP in LEP classes [LY]</td> </tr> </table>		Updated By	English Language Learner	Before	27392	The student is one who has been exited from the ESOL program	After	27392	LEP in LEP classes [LY]
	Updated By	English Language Learner														
Before	27392	The student is one who has been exited from the ESOL program														
After	27392	LEP in LEP classes [LY]														

# Alert Icons

The Alert Icons feature allows for client specific icons that appear next to Students and Users throughout the interface. These icons serve as immediate, easily identifiable flags to end users when a specific Student or User meets defined criteria. For example, an alert icon can be defined for severe allergies, custody alert, etc. Upon displaying next to the student or user, users can click the alert icon to navigate to the applicable screen, tab, and field.

1. In the **Setup** menu, click **Edit Rules & Workflow**.



2. Click the **Alert Icons** tab to customize your own alerts.

Validation   Linked Fields   **Alert Icons**   Execute SQL   Workflow Triggers   SQL Triggers   Student Fields ▼

◀ Prev   Page: 1 / 2   Next ▶   Export   Filter: OFF

	Enabled	Name	Profiles	Show on ID Badge	Show on Student Lists	
	<input checked="" type="checkbox"/>			<input type="checkbox"/>	<input checked="" type="checkbox"/>	
✖	<input type="checkbox"/>	ESE		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Criteria   Alert Icon
✖	<input checked="" type="checkbox"/>	ELL		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Criteria   Alert Icon
✖	<input checked="" type="checkbox"/>	504		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Criteria   Alert Icon
✖	<input checked="" type="checkbox"/>	Custody		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Criteria   Alert Icon
✖	<input checked="" type="checkbox"/>	Life Threatening Allergies		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Criteria   Alert Icon
✖	<input type="checkbox"/>	Medical		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Criteria   Alert Icon
✖	<input checked="" type="checkbox"/>	Immigrant Student		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Criteria   Alert Icon
✖	<input type="checkbox"/>	Gifted ESE		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Criteria   Alert Icon

3. Before making any alterations to the Alert Icons tab, be sure to select the correct fields from the pull-down. It defaults to **Student Fields**. The other options include **District Fields**, **User Fields**, **School Fields**, **Discipline Incident Fields**, and **Referral Fields**.

Validation   Linked Fields   **Alert Icons**   Execute SQL   Workflow Triggers   SQL Triggers   Student Fields ▼

◀ Prev   Page: 1 / 2   Next ▶   Export   Filter: OFF

	Enabled	Name	Profiles	Show on ID Badge	Show on Student Lists	
	<input checked="" type="checkbox"/>			<input type="checkbox"/>	<input checked="" type="checkbox"/>	
✖	<input type="checkbox"/>	ESE		<input type="checkbox"/>	<input checked="" type="checkbox"/>	
✖	<input checked="" type="checkbox"/>	ELL		<input type="checkbox"/>	<input checked="" type="checkbox"/>	
✖	<input checked="" type="checkbox"/>	504		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Criteria   Alert Icon
✖	<input checked="" type="checkbox"/>	Custody		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Criteria   Alert Icon
✖	<input checked="" type="checkbox"/>	Life Threatening Allergies		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Criteria   Alert Icon

Student Fields ▼

Q Filter...

- District Fields
- Student Fields**
- User Fields
- School Fields
- Discipline Incident Fields
- Referral Fields

**i** Alert Icons do not exist for **Discipline Incident Fields** or **Referral Fields**.

4. Any existing alert icons are listed in the table. Use the top row of the table to add a new rule.



Validation Linked Fields **Alert Icons** Execute SQL Workflow Triggers SQL Triggers Student Fields

Prev Page: 1 / 2 Next Export Filter: OFF

Enabled	Name	Profiles	Show on ID Badge	Show on Student Lists	
<input checked="" type="checkbox"/>			<input type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	ESE		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Criteria Alert Icon
<input checked="" type="checkbox"/>	ELL		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Criteria Alert Icon
<input checked="" type="checkbox"/>	504		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Criteria Alert Icon
<input checked="" type="checkbox"/>	Custody		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Criteria Alert Icon
<input checked="" type="checkbox"/>	Life Threatening Allergies		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Criteria Alert Icon
<input type="checkbox"/>	Medical		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Criteria Alert Icon
<input checked="" type="checkbox"/>	Immigrant Student		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Criteria Alert Icon

5. The **Enabled** check box is automatically selected. Clear the check box if you do not want the rule to be enforced when you or other users are editing data. This check box is essentially the on/off button.

Validation Linked Fields **Alert Icons** Execute SQL Workflow Triggers

Prev Page: 1 / 2 Next Export Filter: OFF

Enabled	Name	Profiles
<input checked="" type="checkbox"/>		
<input type="checkbox"/>	ESE	
<input checked="" type="checkbox"/>	ELL	
<input checked="" type="checkbox"/>	504	

6. Enter a **Name** for the alert icon.

Validation Linked Fields **Alert Icons** Execute SQL Workflow Triggers SQL Trigger

« Prev Page: 1 / 2 Next » Export Filter: OFF

Enabled	Name	Profiles
<input checked="" type="checkbox"/>	Medical Alert	
<input type="checkbox"/>	ESE	
<input checked="" type="checkbox"/>	ELL	
<input checked="" type="checkbox"/>	504	
<input checked="" type="checkbox"/>	Custody	

7. To restrict the profiles that can see each alert icon for students and users, select the **Profiles** permitted to the alert icon from the pull-down.

Validation Linked Fields **Alert Icons** Execute SQL Workflow Triggers SQL Triggers Student Fields

« Prev Page: 1 / 2 Next » Export Filter: OFF

Enabled	Name	Profiles	Show on ID Badge	Show on Student Lists
<input checked="" type="checkbox"/>	Medical Alert	ERP-Medicaid Billing, ERP-Medicaid Off-Board Ch...	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	ESE			
<input checked="" type="checkbox"/>	ELL			
<input checked="" type="checkbox"/>	504			
<input checked="" type="checkbox"/>	Custody			
<input checked="" type="checkbox"/>	Life Threatening Allergies			
<input type="checkbox"/>	Medical			
<input checked="" type="checkbox"/>	Immigrant Student			
<input type="checkbox"/>	Gifted ESE			
<input checked="" type="checkbox"/>	TSIC		<input type="checkbox"/>	<input checked="" type="checkbox"/>

Search: saf

☐ Exact [Check all](#) [Clear](#)

- ☒ School Safety Dist Administrator
- ☐ ERP-Salary Reimbursement Access
- ☐ ERP-Cafeteria Manager
- ☐ ERP-Rosa Block
- ☐ ERP-Charter Staff Survey Employee Info. Access
- ☐ ESE District Staff
- ☐ ERP-District Report/Active Staff Count View Access
- ☐ ERP-AE/Register with view all transactions and process funding source
- ☐ ERP-AE/Register with Void and View All transactions access, process funding source access

**i** If the **Profiles** pull-down is left blank, then all profiles will be permitted to the alert icons. If at least one profile is selected, only the selected profile will be able to see the alert icon. Users with multiple profiles will see alert icons if at least one of their profiles is selected. Student and parent profiles are not available to be selected.

8. Select the **Show on ID Badge** check box so the alert icon displays on the student ID badge when the "Show alert icons on student badge" option is enabled on [Print ID Badges](#) screen.

Validation   Linked Fields   **Alert Icons**   Execute SQL   Workflow Triggers   SQL Triggers   Student Fields ▼

◀ Prev   Page: 1 / 2   Next ▶   Export   Filter: OFF

Enabled	Name	Profiles	Show on ID Badge	Show on Student Lists	
<input checked="" type="checkbox"/>	Medical Alert	ERP-Medicaid Billing, ERP-Medicaid Off-Board Ch...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	ESE		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Criteria   Alert Icon
<input checked="" type="checkbox"/>	ELL		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Criteria   Alert Icon
<input checked="" type="checkbox"/>	504		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Criteria   Alert Icon
<input checked="" type="checkbox"/>	Custody		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Criteria   Alert Icon
<input checked="" type="checkbox"/>	Life Threatening Allergies		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Criteria   Alert Icon
<input type="checkbox"/>	Medical		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Criteria   Alert Icon

9. Select the **Show on Student Lists** check box to ensure the alert icon displays in student lists throughout the system, such as Student Info.

Validation   Linked Fields   **Alert Icons**   Execute SQL   Workflow Triggers   SQL Triggers   Student Fields ▼

◀ Prev   Page: 1 / 2   Next ▶   Export   Filter: OFF

Enabled	Name	Profiles	Show on ID Badge	Show on Student Lists	
<input checked="" type="checkbox"/>	Medical Alert	ERP-Medicaid Billing, ERP-Medicaid Off-Board Ch...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	ESE		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Criteria   Alert Icon
<input checked="" type="checkbox"/>	ELL		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Criteria   Alert Icon
<input checked="" type="checkbox"/>	504		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Criteria   Alert Icon
<input checked="" type="checkbox"/>	Custody		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Criteria   Alert Icon
<input checked="" type="checkbox"/>	Life Threatening Allergies		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Criteria   Alert Icon
<input type="checkbox"/>	Medical		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Criteria   Alert Icon

10. Press the **Enter** key to add the alert. The line turns blue when it has been added. The information here is auto-saved; there is no save button on this screen.

Validation						
Linked Fields						
Alert Icons						
Execute SQL						
Workflow Triggers						
SQL Triggers						
Student Fields						
<div> <div>Prev</div> <div>Page: 1 / 2</div> <div>Next</div> <div>Export</div> <div>Filter: OFF</div> </div>						
Enabled	Name	Profiles	Show on ID Badge	Show on Student Lists		
<input checked="" type="checkbox"/>	Medical Alert	ERP-Medicaid Billing, ERP-Medicaid Off-Board Ch...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
<input type="checkbox"/>	ESE		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Criteria	Alert Icon
<input checked="" type="checkbox"/>	ELL		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Criteria	Alert Icon
<input checked="" type="checkbox"/>	504		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Criteria	Alert Icon
<input checked="" type="checkbox"/>	Custody		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Criteria	Alert Icon
<input checked="" type="checkbox"/>	Life Threatening Allergies		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Criteria	Alert Icon
<input type="checkbox"/>	Medical		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Criteria	Alert Icon
<input checked="" type="checkbox"/>	Immigrant Student		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Criteria	Alert Icon
<input type="checkbox"/>	Gifted ESE		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Criteria	Alert Icon

Validation						
Linked Fields						
Alert Icons						
Execute SQL						
Workflow Triggers						
SQL Triggers						
Student Fields						
<div> <div>Prev</div> <div>Page: 1 / 2</div> <div>Next</div> <div>Export</div> <div>Filter: OFF</div> </div>						
Enabled	Name	Profiles	Show on ID Badge	Show on Student Lists		
<input checked="" type="checkbox"/>			<input type="checkbox"/>	<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	Medical Alert	School Safety Dist Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Criteria	Alert Icon
<input type="checkbox"/>	ESE		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Criteria	Alert Icon
<input checked="" type="checkbox"/>	ELL		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Criteria	Alert Icon
<input checked="" type="checkbox"/>	504		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Criteria	Alert Icon
<input checked="" type="checkbox"/>	Custody		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Criteria	Alert Icon
<input checked="" type="checkbox"/>	Life Threatening Allergies		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Criteria	Alert Icon

**11.** Click **Criteria** next to the rule to set the specifics of the rule. When selected, a criteria pop-up window will display.

Validation   Linked Fields   **Alert Icons**   Execute SQL   Workflow Triggers   SQL Triggers   Student Fields ▼

Criteria for Medical Alert

Criteria Match Any ☐

Field	On Change	Not	Value
*Registrar Notes*: Registrar N...	<input type="checkbox"/>	<input type="checkbox"/>	

Match Query

This query must select a single column aliased as `student_id`. If this is set, a student will only match this rule if it matches the criteria and its `student_id` is included in the results.

Valid replacements are `{date}`, `{school_id}`, `{year}`, `{marking_period_id}`, and `{current_staff_id}`.

Done

12. Select the **Field** for which you would like to set an icon from the pull-down. Note: The fields available here are largely student and student enrollment fields; address fields are not available here.

Criteria for Medical Alert

Criteria Match Any ☐

Field	On Change	Not	Value
Health Medical: Medical Alerts ... ▼	<input type="checkbox"/>	<input type="checkbox"/>	

Match Query

13. For the rule to display upon the selected fields being changed, select the **On Change** check box.

## Criteria for Medical Alert

### Criteria

Match Any ☐

Field	On Change	Not	Value
Health Medical: Medical Alerts ... <input type="button" value="v"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text"/>

Match Query

**14.** Select the **Not** check box to add it to the rule you are creating. Using Not is to say the Field is NOT the Value entered. In this case, Medical Alerts is Not null/empty, which means the alert icon will appear for all students who have data in the Medical Condition field.

## Criteria for Medical Alert

### Criteria

Match Any ☐

Field	On Change	Not	Value
Health Medical: Medical Alerts ... <input type="button" value="v"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text"/>

Match Query

**15.** Enter the **Value** that will trigger the alert icon. For select fields, a list of allowable options will display for selection. In the example shown, the Value is left blank.

## Criteria for Medical Alert

### Criteria

Match Any ☐

Field	On Change	Not	Value
Health Medical: Medical Alerts ... <input type="button" value="v"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text"/>

Match Query

**a.** For date fields, such as birthdate, clicking the Value field opens the Date Criteria pop-up window to define the date criteria. Enter the corresponding information, and then click **Save**.

Date Criteria

Empty

OR

Prior to

▼

0

day(s)

▼

before

▼

(Today)

▼

OR

Between:

mm/dd/yyyy

and

mm/dd/yyyy

Save

or

Cancel



Rules on text fields will be hard to enforce since the value must match exactly to trigger the change.

16. When complete, press the **Enter** key to save the data. Upon saving the line turns blue.

Criteria for Medical Alert

Criteria

Match Any ☐

	Field	On Change	Not	Value
	*Registrar Notes*: Registrar N... ▼	<input type="checkbox"/>	<input type="checkbox"/>	
<div>—</div>	Health Medical: Medical Condi... ▼	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

Match Query

17. Instead of defining criteria by selecting fields and defining the values, a query can be entered in the **Match Query** section of the Criteria window. Requirements for the query are indicated in the yellow box.

## Match Query

This query must select a single column aliased as `student_id`. If this is set, a student will only match this rule if it matches the criteria and its `student_id` is included in the results.

Valid replacements are `{date}`, `{school_id}`, `{syear}`, `{marking_period_id}`, and `{current_staff_id}`.

Done

**18.** Select the **Match Any** check box to apply the following conditions: The edit rule is met when any of the criteria is matched instead of having to match all of the criteria (each row of criteria is an “or” statement). When the check box is not selected, each row of criteria is an “and” statement.

## Criteria for Medical Alert

Match if the student meets \*any\* of the criteria, rather than \*all\*

Criteria

Match Any 


**19.** When all information has been entered/selected, click **Done** at the bottom of the Criteria pop-up to return to the Alert Icons tab.






### Alert Icon for Medical Alert

Select an icon from the gallery or upload your own:



Upload new icon



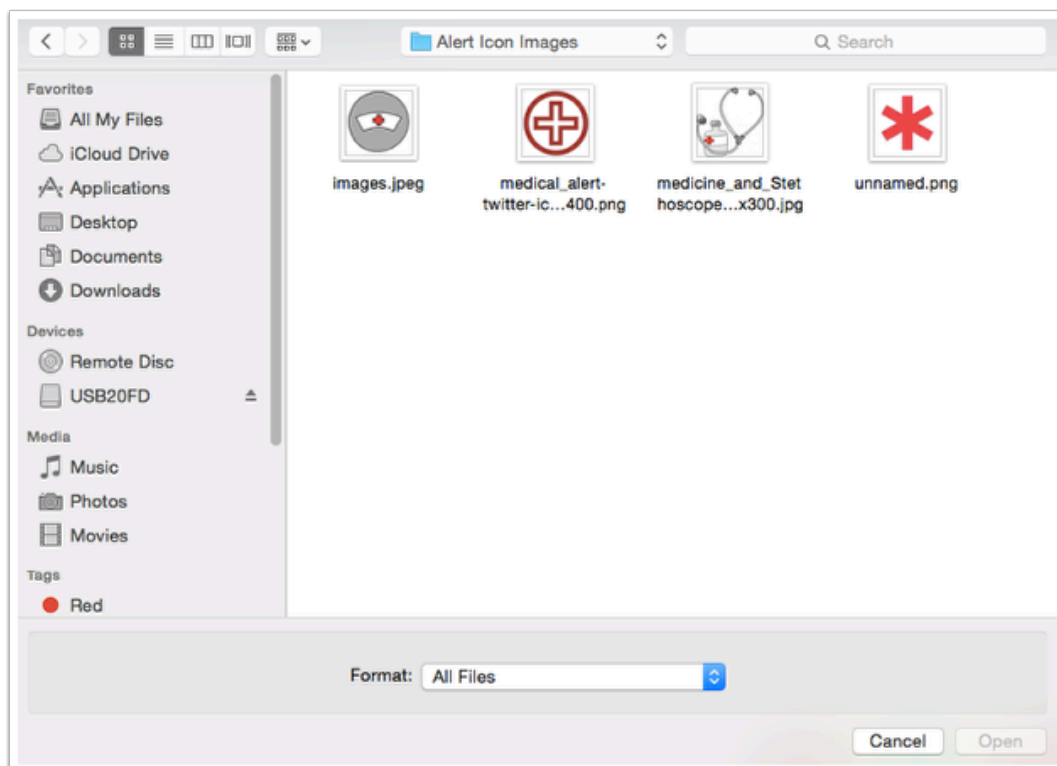
Current Alert Icon Image:

Tool Tip:

Tool Tip Field:

Clear Save Cancel

**a.** Clicking the green plus sign to upload a new icon will open the file browser. Choose the image you want to use.



**b.** Click the desired icon from preexisting icons or from the ones you uploaded.

Select an icon from the gallery or upload your own:




Upload new icon



**22.** The **Tool Tip** text box and **Tool Tip Field** are used to define the contents of the tool tip when a user hovers the mouse over the alert icon. Enter text in the Tool Tip text box and/or select a field in Tool Tip Field. When a Tool Tip Field is selected, the information in that field in the student's record will display in the tool tip. When both tool tip text and a tool tip field are set up, both are displayed in the tool tip.

Upload new icon




Current Alert Icon Image:

Tool Tip:

Tool Tip Field:  ▼

Clear
Save
Cancel

**23.** When all Alert Icon information is complete, click **Save**. To clear all selection made and start over, click **Clear**. To cancel setting up an icon altogether, click **Cancel**.



Upload new icon 

Current Alert Icon Image:

Tool Tip:





Tool Tip Field:

See the image below of the enabled alert icon for medical.

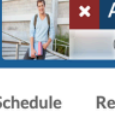

**FOCUS** **Writers02**  **Adams, Ponyboy Henry** **Student Info**  
 0086404 - 09 




Enrollment Schedule Requests Grades Absences Activities Referrals

SSS Choice Billing


Filter fields...     **General Demographics**

Upon clicking the icon, the Health Medical tab opens and directs your attention to the specific field; in this case, a "Medical Condition" check box.

**FOCUS** **Writers02**  **Adams, Ponyboy Henry** **Student Info** **Lizette Garcia** **Focus High School - 0041** **SIS**  
 0086404 - 09  **2022-2023** **4th 9 Weeks** **ERP**

Enrollment Schedule Requests Grades Absences Activities Referrals Test History Audit Trail Grad Files   

SSS Choice Billing

Filter fields... 



**Health Medical**


Medical Condition ☒

Unnamed Field

Completed Medical Release Form ☐ N/A ☐ N/A ☐ YES

**Immunizations & Physicals**

  **Filter: OFF**

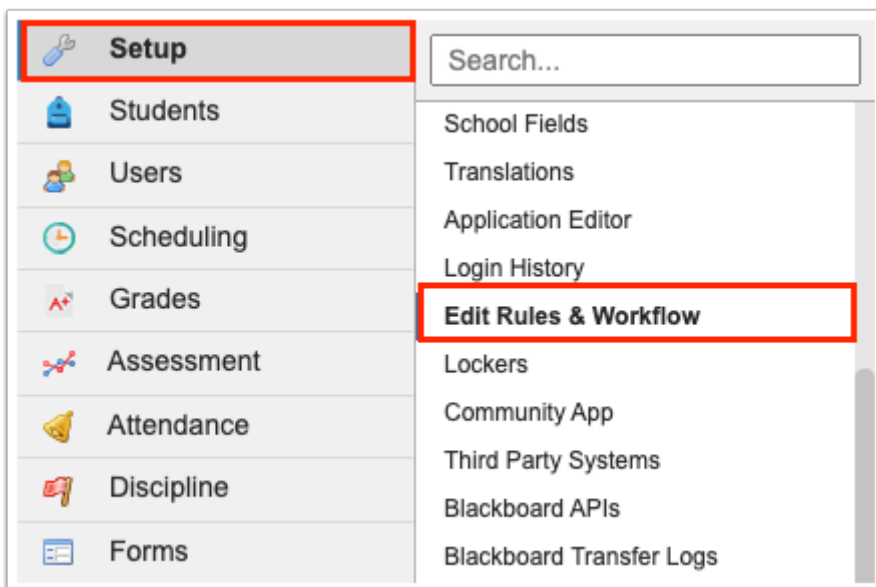
	Type	Date	Comments
	<input type="text"/>	<input type="text"/>	<input type="text"/>

# Execute SQL

The Execute SQL functionality allows for client defined stored procedures (only MSSQL), SQL statements, or queries to be triggered for a specific Student or User, when defined criteria is changed or met through the interface. (Note: This functionality replaces Student, Student Enrollment, User and User Enrollment plugins from Version 7 and prior. Level 1 training is recommended prior to use.)

**!** SQL setup on fields does not run if you try to Mass Add information to those fields or if you try to Mass Add Log records to those fields. Focus recommends building a scheduled job to update any fields that have had information Mass Added to them via Setup > [Scheduled Jobs](#).

1. In the **Setup** menu, click **Edit Rules & Workflow**.



2. Click the **Execute SQL** tab to add a new rule (query).

Select Student/Staff

Edit Rules & Workflow

Lizette Garcia

Focus High School - 0041

SIS

2022-2023

4th 9 Weeks

ERP

Validation

Linked Fields

Alert Icons

Execute SQL

Workflow Triggers

SQL Triggers

Student Fields

Export

Filter: OFF

	Enabled	New Student	Name	
	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	create or update username (first initial + lastname + integer if already exists), lunch ticket number, pass	Criteria Execute SQL
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Clean SSN	Criteria Execute SQL
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	create username (first initial + lastname + integer if already exists), lunch ticket number, password, upd	Criteria Execute SQL
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Update Community Service Hours	Criteria Execute SQL
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	IMM - Vaccination Date 1	Criteria Execute SQL

3. Before making any alterations to the Execute SQL tab, be sure to select the correct fields from the pull-down. It defaults to **Student Fields**. The other options include **District Fields**, **User Fields**, **School Fields**, **Discipline Incident Fields**, and **Referral Fields**.

Validation

Linked Fields

Alert Icons

Execute SQL

Workflow Triggers

SQL Triggers

Student Fields

Export

Filter: OFF

	Enabled	New Student	Name	
	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	create or update username (first initial + lastname + integer if already exists), lunch ticket number, p	Criteria Execute SQL
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Clean SSN	Criteria Execute SQL
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	create username (first initial + lastname + integer if already exists), lunch ticket number, password, u	Criteria Execute SQL

Filter

District Fields

Student Fields

User Fields

School Fields



Discipline Incident Fields

Referral Fields

Any discipline edit rules that are set up now apply to the referrals list as well, not just the referral itself.

4. Any existing queries are listed in the table. The top row of the table can be used to add a new query.



Validation Linked Fields Alert Icons **Execute SQL** Workflow Triggers SQL Triggers Student Fields ▼

Export   Filter: OFF

	Enabled	New Student	Name ▲	
	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
—	<input checked="" type="checkbox"/>	<input type="checkbox"/>	create or update username (first initial + lastname + integer if already exists), lunch ticket number, p:	Criteria Execute SQL
—	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Clean SSN	Criteria Execute SQL
—	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	create username (first initial + lastname + integer if already exists), lunch ticket number, password, u	Criteria Execute SQL
—	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Update Community Service Hours	Criteria Execute SQL
—	<input checked="" type="checkbox"/>	<input type="checkbox"/>	IMM - Vaccination Date 1	Criteria Execute SQL
—	<input checked="" type="checkbox"/>	<input type="checkbox"/>	IMM - Vaccination Date 2	Criteria Execute SQL

5. The **Enabled** check box is automatically selected. Clear the check box if you do not want the rule to be enforced automatically. This check box is essentially the on/off button.

Validation Linked Fields Alert Icons **Execute SQL** Workflow Triggers

Export   Filter: OFF

	Enabled	New Student	Name ▲
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
—	<input checked="" type="checkbox"/>	<input type="checkbox"/>	create or update username (first initial + lastname + integer if already
—	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Clean SSN
—	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	create username (first initial + lastname + integer if already exists), lu
—	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Update Community Service Hours

6. Select the **New Student** check box to limit the query execution to new students. Otherwise, the query will be executed whenever a student's information is edited.

Validation
Linked Fields
Alert Icons
**Execute SQL**
Workflow Triggers

Export
Filter: OFF

	Enabled	New Student	Name
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	create or update username (first initial + lastname + integer if already
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Clean SSN
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	create username (first initial + lastname + integer if already exists), lu
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Update Community Service Hours

The name of this check box varies depending on the type of fields selected:

- Student Fields: New Student
- District Fields: New District
- User Fields: New User
- School Fields: New School
- Discipline Incident Fields: New Discipline Incident
- Referral Fields: New Referral

7. Enter a **Name** for the query. The Name entered here doesn’t appear anywhere else.

Validation
Linked Fields
Alert Icons
**Execute SQL**
Workflow Triggers
SQL Triggers
Student Fields

Export
Filter: OFF

	Enabled	New Student	Name	
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Student Phone Number	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	create or update username (first initial + lastname + integer if already exists), lunch ticket number, p	Criteria Execute SQL
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Clean SSN	Criteria Execute SQL
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	create username (first initial + lastname + integer if already exists), lunch ticket number, password, u	Criteria Execute SQL
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Update Community Service Hours	Criteria Execute SQL
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	IMM - Vaccination Date 1	Criteria Execute SQL

8. Press the **Enter** key to add the query. The line turns blue when it has been added. The information here is auto-saved; there is no save button on this screen.



Validation				Linked Fields		Alert Icons		Execute SQL	Workflow Triggers		SQL Triggers		Student Fields	
Export				Filter: OFF										
Enabled	New Student	Name												
<input checked="" type="checkbox"/>	<input type="checkbox"/>													
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Student Phone Number						Criteria	Execute SQL					
<input checked="" type="checkbox"/>	<input type="checkbox"/>	create or update username (first initial + lastname + integer if already exists), lunch ticket number, pi						Criteria	Execute SQL					
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Clean SSN						Criteria	Execute SQL					
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	create username (first initial + lastname + integer if already exists), lunch ticket number, password, u						Criteria	Execute SQL					
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Update Community Service Hours						Criteria	Execute SQL					
<input checked="" type="checkbox"/>	<input type="checkbox"/>	IMM - Vaccination Date 1						Criteria	Execute SQL					

9. Click **Criteria** next to the rule to set the specifics of the rule. When selected, a criteria pop-up window displays.

Validation				Linked Fields		Alert Icons		Execute SQL	Workflow Triggers		SQL Triggers		Student Fields											
Export				Filter: OFF																				
Enabled		<b>Criteria for Student Phone Number</b>																						
<input checked="" type="checkbox"/>		Criteria <span>Match Any <input type="checkbox"/></span>																						
		<table> <tr> <th>Field</th><th>On Change</th><th>Not</th><th>Value</th></tr> <tr> <td>"Registrar Notes": Registrar N...</td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td></td></tr> </table>												Field	On Change	Not	Value	"Registrar Notes": Registrar N...	<input type="checkbox"/>	<input type="checkbox"/>				
Field	On Change	Not	Value																					
"Registrar Notes": Registrar N...	<input type="checkbox"/>	<input type="checkbox"/>																						
		<b>Match Query</b> <p>This query must select a single column aliased as <b>student_id</b>. If this is set, a student will only match this rule if it matches the criteria and its <b>student_id</b> is included in the results.</p> <p>Valid replacements are <b>[date]</b>, <b>[school_id]</b>, <b>[year]</b>, <b>[marking_period_id]</b>, and <b>[current_staff_id]</b>.</p>																						
		<div>Done</div>																						

a. This is where you will set up the criteria that will trigger the SQL to execute. Multiple criteria can be set up. Criteria can be set up by selecting fields and entering values in the table at the top of the Criteria window or by entering a query in the Match Query section at the bottom of the window.

## Criteria for Create Username

Criteria

Match Any ☐

Field	On Change	Not	Value
*REMINDER*: Reminder 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

Match Query

This query must select a single column aliased as `student_id`. If this is set, a student will only match this rule if it matches the criteria and its `student_id` is included in the results.

Valid replacements are `{date}`, `{school_id}`, `{year}`, and `{marking_period_id}`.


Done

10. Select the correct **Field** from the pull-down.

## Criteria for Student Phone Number

Criteria

Match Any ☐

Field	On Change	Not	Value
Student Phone Number 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

Match Query

11. Select the **On Change** check box if you want the query to execute upon the selected field being changed.

## Criteria for Student Phone Number

### Criteria

Match Any ☐

	Field	On Change	Not	Value
	Student Phone Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

### Match Query

**12.** Select the **Not** check box to add it to the rule you are creating. Using Not is to say execute the SQL when the Field is NOT the Value entered. In the example shown, the SQL will execute when Student Phone Number is Not empty (the Value is empty).

### Criteria

Match Any ☐

	Field	On Change	Not	Value
	*Registrar Notes*: Registrar N...	<input type="checkbox"/>	<input type="checkbox"/>	
	General Demographics : Stud...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

### Match Query

**13.** Enter the **Value** that will trigger the query to execute. For select fields, a list of allowable options will display for selection. In the example shown, the Value is Y.

Field	On Change	Not	Value
Fed State: Immigrant Student	<input type="checkbox"/>	<input type="checkbox"/>	Yes, this student is an immigrant [Y]

Match Query

This query must select a single column aliased as **stud** and its **student\_id** is included in the results.

Valid replacements are **federal**, **school\_id**, **foreign** and **reading\_level\_id**.

Filter

Check all visible Clear selected

☐ \*\*Empty\*\*

☐ No, this student is not an immigrant [N]

☐ Not applicable. This code can be used for students in School Number, Current Enrollment 35...

☒ Yes, this student is an immigrant [Y]

**a.** For date fields, such as Date Entered United States, clicking the Value field opens the Date Criteria pop-up window to define the date criteria. Enter the corresponding information, and then click **Save**.

### Criteria for Student Phone Number

Criteria

Match Any☐

#### Date Criteria

Empty

OR

Prior to

▼

0

day(s)

▼

before

▼

(Today)

▼

OR

Between:

mm/dd/yyyy

📅

and

mm/dd/yyyy

📅

Save

or

Cancel



Rules on text fields will be hard to enforce since the value must match exactly to trigger the change.

14. When complete, press the **Enter** key to save the data. Upon saving the line turns blue.

### Criteria for Student Phone Number

Criteria

Match Any☐

	Field	On Change	Not	Value
	*Registrar Notes*: Registrar N... <div>▼</div>	<input type="checkbox"/>	<input type="checkbox"/>	<div></div>
<div></div>	General Demographics : Stud... <div>▼</div>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<div></div>

Match Query


15. Select the **Match Any** check box to apply the following conditions: The edit rule is met when any of the criteria is matched instead of having to match all of the criteria (each row of criteria is an “or” statement). When the check box is not selected, each row of criteria is an “and” statement.

## Criteria for Student Phone Number

Match if the student meets \*any\* of the criteria, rather than \*all\*

### Criteria

Match Any ☐


	Field	On Change	Not	Value
	*Registrar Notes*: Registrar N...	<input type="checkbox"/>	<input type="checkbox"/>	
	General Demographics : Stud...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

16. Add additional fields, if needed. Click **Done** to return to the Execute SQL tab.

## Criteria for Student Phone Number

### Criteria

Match Any ☐

	Field	On Change	Not	Value
	*Registrar Notes*: Registrar N...	<input type="checkbox"/>	<input type="checkbox"/>	
	General Demographics : Stud...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

### Match Query

This query must select a single column aliased as `student_id`. If this is set, a student will only match this rule if it matches the criteria and its `student_id` is included in the results.

Valid replacements are `{date}`, `{school_id}`, `{year}`, `{marking_period_id}`, and `{current_staff_id}`.

Done

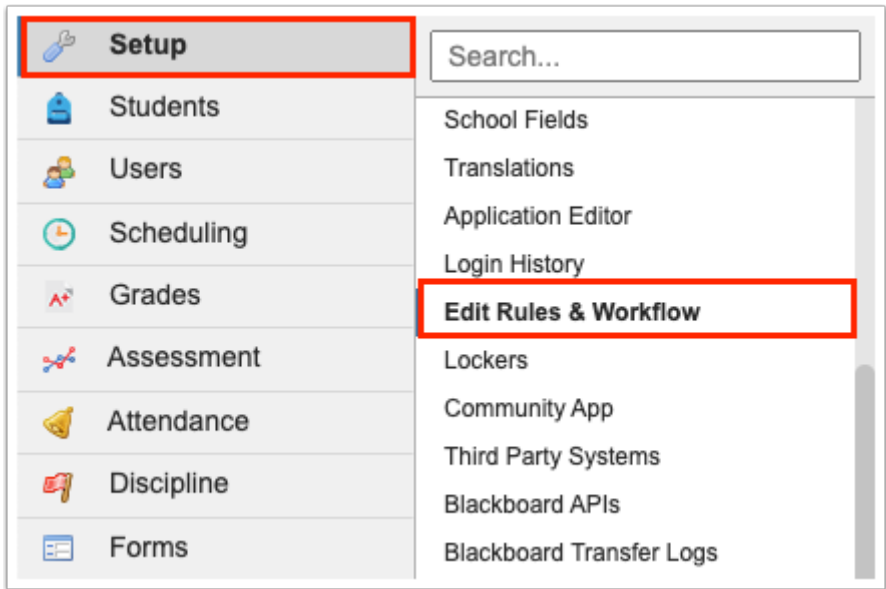
17. From the Execute SQL tab, click the **Execute SQL** button. The SQL Statement pop-up window is displayed.



# Workflow Triggers

The Workflow Trigger feature includes four basic functions: Generating Emails, Inserting Letters into the Letter Queue, and Custom Portal Alerts generated from Students > [Print Letters & Send Email](#), Users > [Print Letters & Send Email](#), and Students > [Communication](#) (v.12) or Students > [Phone Communication](#) v.11). Each available feature can be setup based upon client defined criteria and execute only when a Student or User record is updated or modified to meet the defined criteria.

1. In the **Setup** menu, click **Edit Rules & Workflow**.



2. Click the **Workflow Triggers** tab to add a new trigger.

Select Student/Staff
Edit Rules & Workflow

Lizette Garcia
Focus High School - 0041
2022-2023
4th 9 Weeks
SIS
ERP

Validation
Linked Fields
Alert Icons
Execute SQL
**Workflow Triggers**
SQL Triggers
Student Fields

Export
Filter: OFF

	Enabled	Name	Type	Letter/Template	Affected Student	Affected Student Personal Email	Affected Parent	Letter Logging	Recipient Users	Recipient Profile	Recipient
	<input checked="" type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
	<input checked="" type="checkbox"/>	Studen	E..	Workflow ...	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Abernath...		
	<input checked="" type="checkbox"/>	Active	P..		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		System A...	
	<input checked="" type="checkbox"/>	Addres	P..		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		System A...	
	<input checked="" type="checkbox"/>	Absenc	E..	Absence ...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Garcia, L...		lizetteg@
	<input checked="" type="checkbox"/>	Absenc	E..	Absences	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Garcia, L...	System A...	lizetteg@

3. Before making any alterations to the Workflow Triggers tab, be sure to select the correct fields from the pull-down. It defaults to **Student Fields**. The other options include **District Fields**, **User Fields**, **School Fields**, **Discipline Incident Fields**, and **Referral Fields**.

Validation
Linked Fields
Alert Icons
Execute SQL
**Workflow Triggers**
SQL Triggers

Export
Filter: OFF

	Enabled	Name	Type	Letter	Affected Student	Affected Student Personal Email	Affected Parent	Letter Logging	Recipient Users	Recipient Profile	Recipient
	<input checked="" type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
	<input checked="" type="checkbox"/>	Studen	E..	W.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
	<input checked="" type="checkbox"/>	Active	P..		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
	<input checked="" type="checkbox"/>	Addres	P..		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		System A...	
	<input checked="" type="checkbox"/>	Absenc	E..	A..	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Garcia, ...		lizetteg@focu
	<input checked="" type="checkbox"/>	Absenc	E..	A..	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Garcia, ...	System A...	lizetteg@focu

Student Fields
Filter
District Fields
**Student Fields**
User Fields
School Fields
Discipline Incident Fields
Referral Fields



Workflow Triggers do not exist for **School Fields**, **Discipline Incident Fields** or **Referral Fields**.

4. Any existing workflow triggers are listed in the table. Use the top row of the table to add a new workflow.



Validation Linked Fields Alert Icons Execute SQL **Workflow Triggers** SQL Triggers Student Fields

Export Filter: OFF

	Enabled	Name	Type	Letter	Affected Student	Affected Student Personal Email	Affected Parent	Letter Logging	Recipient Users	Recipient Profile	Recipient Email
	<input checked="" type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
	<input checked="" type="checkbox"/>	Student	E..	W..	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
	<input checked="" type="checkbox"/>	Active	P..		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		System A...	
	<input checked="" type="checkbox"/>	Address	P..		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		System A...	
	<input checked="" type="checkbox"/>	Absence	E..	A..	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Garcia, ...		lizetteg@focu
	<input checked="" type="checkbox"/>	Absence	E..	A..	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Garcia, ...	System A...	lizetteg@focu

5. The **Enabled** check box is automatically selected. Clear the check box if you do not want the rule to be enforced automatically. This check box is essentially the on/off button.

Export Filter: OFF

	Enabled	Name	Type	Letter	Affected Student	Affected Student Personal Email	Affected Parent	Letter Logging	Recipient Users	Recipient Profile	Recipient Email
	<input checked="" type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
	<input checked="" type="checkbox"/>	Student	E..	W..	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
	<input checked="" type="checkbox"/>	Active	P..		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		System A...	
	<input checked="" type="checkbox"/>	Address	P..		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		System A...	
	<input checked="" type="checkbox"/>	Absence	E..	A..	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Garcia, ...		lizetteg@focu
	<input checked="" type="checkbox"/>	Absence	E..	A..	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Garcia, ...	System A...	lizetteg@focu

6. Enter a **Name** for the workflow trigger. The Name entered here will display as the Subject if set up as an email and the text displayed on the portal alert or SMS.

Export Filter: OFF

	Enabled	Name	Type	Letter	Affected Student
	<input checked="" type="checkbox"/>	Absence			<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Student Field	Email	Workfl...	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Active Student	Portal ...		<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Address Change	Portal ...		<input type="checkbox"/>

7. Select the **Type** from the pull-down; options include Communication Template, Email, Letter Queue, and Portal Alert.

Validation   Linked Fields   Alert Icons   Execute SQL   **Workflow Triggers**   SQL Triggers   Student Fields ▼

Export Filter: OFF

	Enabled	Name	Type	Letter/Template	Affected Student	Affected Student Personal Email	Affected Parent	Letter Logging	Recipient Users	Recipient Profile
	<input checked="" type="checkbox"/>	Messa			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	<input checked="" type="checkbox"/>	Studen	<input type="text" value="Filter..."/> <ul style="list-style-type: none"> <li>Communication Template</li> <li>Email</li> <li>Letter Queue</li> <li>Portal Alert</li> </ul>		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Abernath...	
	<input checked="" type="checkbox"/>	Active			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		System A...
	<input checked="" type="checkbox"/>	Address			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		System A...
	<input checked="" type="checkbox"/>	Absenc			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Garcia, L...	
	<input checked="" type="checkbox"/>	Absenc			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Garcia, L...	System A...

a. If you select **Communication Template** here, [Templates](#) created in [Communication](#) display in the Letter/Template pull-down. When using the Communication Template, all information entered and attached to the template will pull into the notification generated as a result of the workflow trigger, such as email, attached files, attached voice messages, etc.

b. If you select **Email** here, when the email is sent based on the trigger set up, the email will be logged in the corresponding student's Letter Logging tab ([Student Info](#)) or the corresponding user's Letter Log section via [User Info](#).

**i** When **Email** is selected, the followed fields are active for selection: Letter, Affected Student, Affected Student Personal Email, Affected Parent, Letter Logging, Recipient Users, Recipient Profile, and Recipient Email Addresses.

**i** User entries will display in the Letter Log if the field has been enabled by the district via [User Fields](#). When enabled, the email will display in the selected category (tab). Note: Permissions must be set in User Fields as well as [Profiles](#) > User Fields.

c. If you select **Letter Queue** here, when the letter is generated based on the trigger set up, the letter will generate to Student > [Letter Queue](#) or Users > [Letter Queue](#) depending on the fields selected (Student Fields or User Fields).

**i** When **Letter Queue** is selected, the Letter field is the only active field for selection.

d. If you select **Portal Alert** here, upon clicking on the alert, Focus will navigate to an Advanced Report with impacted students/users listed.

**i** When **Portal Alert** is selected, only the Recipient Users and Recipient Profiles columns apply.

8. Select a **Letter/Template** from the pull-down. The letters displayed in the pull-down populate from created letters, emails, text messages, and/or templates via Students > [Print Letters & Send Email](#), Users > [Print Letters & Send Email](#), and/or Students > [Communication](#).

Enabled	Name	Type	Letter	Affected Student	Affected Student Personal Email	Affected Parent	Letter Logging	Recipient Users	Recipient Profile	Recipient Email Address
<input checked="" type="checkbox"/>	Absenc	E..	A..	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>	Studen	E..	Filter							
<input checked="" type="checkbox"/>	Active	P..	2019-2020 Letter							
<input checked="" type="checkbox"/>	Addres	P..	2nd quarter news							
<input checked="" type="checkbox"/>	Absenc	E..	2 Truancy Intervention							
			October 2014 Update							
			3rd 9 Attendance Warning Letter							
			4th Quarter Attendance							
			Absence Notice							
			Absences							
			Algebra EOC Invitation							
			Algebra EOC Invitation							

9. If you selected, Student Fields, select the **Affected Student** and/or **Parent** check boxes to notify the student or parent (via Type selected: Email or SMS) when a student's record is changed/edited.

Select the **Affected Student Personal Email** if the student field has been enabled by the district and personal emails have been recorded for students in place of or in addition to primary emails (Affected Student).

Enabled	Name	Type	Letter	Affected Student	Affected Student Personal Email	Affected Parent	Letter Logging	Recipient Users
<input checked="" type="checkbox"/>	Absenc	E..	A..	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Studen	E..	W.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	Active	P..		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Addres	P..		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Absenc	E..	A..	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Garcia, L...

a. If you selected, User Fields, select the **Affected User** check box to notify the user (via Type selected: Email or SMS) when a the user's record is changed/edited. Note: The Affected User options only applies to the Email Type.

10. Select the **Letter Logging** check box, which is available if Email or SMS is selected as Type, to ensure a record of the email or SMS is saved on the student's record in Letter Logging tab or section of [Student Info](#).

The screenshot shows the 'Workflow Triggers' tab with a table of triggers. The 'Letter Logging' column has a red box around the checkbox for the first trigger.

Enabled	Name	Type	Letter	Affected Student	Affected Student Personal Email	Affected Parent	Letter Logging	Recipient Users	Recipient Profile	Recipient Email Addresses	
<input checked="" type="checkbox"/>	Absent	E..	A..	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
<input checked="" type="checkbox"/>	Studen	E..	W.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				Criteria
<input checked="" type="checkbox"/>	Active	P..		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		System A...		Criteria
<input checked="" type="checkbox"/>	Address	P..		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		System A...		Criteria
<input checked="" type="checkbox"/>	Absenc	E..	A..	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Garcia, L...		lizetteg@focusschools	Criteria

The screenshot shows the 'Student Info' page for 'Abe, Charlie Noel'. The 'Letter Logging' option is highlighted in the left sidebar. The 'Letter Log' table shows three entries.

Recipient	Date	Subject	Body	Sender	Time	Letter PDF	Recipient Email
Student	01/26/2022	Grade 9	 	Lizette C	11:48	Grade 9 F Letter.pdf	
Both	08/12/2022	Absences	Aloha,	Lizette C	01:47	Absences.pdf	
Parents	09/01/2022	Student	WORK	Lizette C	1:58 P		lizetteg@focuss

11. Specific users can be selected for a notification upon student/user data changing. For example, if a student's ELL information is changed LY, users chosen via the **Recipient Users** pull-down will be emailed or texted.

Export		Filter: OFF										
	Enabled	Name	Type	Letter	Affected Student	Affected Student Personal Email	Affected Parent	Letter Logging	Recipient Users	Recipient Profile	Recipient Email Addresses	
	<input checked="" type="checkbox"/>	Absenc	E...	A...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Garcia, L...	System A...		
-	<input checked="" type="checkbox"/>	Studen	E...	W...	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				Criteria
-	<input checked="" type="checkbox"/>	Active	P...		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		System A...		Criteria
-	<input checked="" type="checkbox"/>	Addres	P...		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		System A...		Criteria
-	<input checked="" type="checkbox"/>	Absenc	E...	A...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Garcia, L...		lizetteg@focusschoolsof	Criteria

**12.** You can select specific profiles to be alerted as well. If a profile is chosen via the **Recipient Profile** pull-down, all users assigned to the profile will be alerted (via the Type selected: Email, Portal Alert, or SMS) when a student's/user's record is changed/edited.

The Alerts display on the existing Alerts [Portal](#) block.

**13.** To set up a specific email address to receive the notification upon student/user data being changed/edited, type the email address in the **Recipient Email Addresses** text box.

**14.** Press the **Enter** key to add the query. The line turns blue when it has been added. The information here is auto-saved; there is no save button on this screen.

Export		Filter: OFF										
	Enabled	Name	Type	Letter	Affected Student	Affected Student Personal Email	Affected Parent	Letter Logging	Recipient Users	Recipient Profile	Recipient Email Addresses	
	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="button" value="v"/>	<input type="button" value="v"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="v"/>	<input type="button" value="v"/>	<input type="text"/>	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Absenc	<input type="button" value="v"/>	<input type="button" value="v"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Garcia, L...	System A...	lizetteg@focusschoolsof	Criteria
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Studen	<input type="button" value="v"/>	<input type="button" value="v"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="v"/>	<input type="button" value="v"/>		Criteria
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Active	<input type="button" value="v"/>	<input type="button" value="v"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="v"/>	System A...		Criteria
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Addres	<input type="button" value="v"/>	<input type="button" value="v"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="v"/>	System A...		Criteria
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Absenc	<input type="button" value="v"/>	<input type="button" value="v"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Garcia, L...	<input type="button" value="v"/>	lizetteg@focusschoolsof	Criteria

**15.** Click the **Criteria** button next to the rule to set the specifics of the workflow trigger. When selected, a criteria pop-up window displays.

Validation Linked Fields Alert Icons Execute SQL Workflow Triggers SQL Triggers Student Fields

Export Filter OFF

### Criteria for Absence

Criteria Match Any ☐

Field	On Change	Not	Value
"Registrar Notes": Registrar N...	<input type="checkbox"/>	<input type="checkbox"/>	

Match Query

This query must select a single column aliased as `student_id`. If this is set, a student will only match this rule if it matches the criteria and its `student_id` is included in the results.

Valid replacements are `{date}`, `{school_id}`, `{year}`, `{marking_period_id}`, and `{current_staff_id}`

Done

Recipient Profile	Recipient Email Addresses	
System Ad...	lizetteg@focusschoolsof	Criteria
System Ad...		Criteria
System Ad...		Criteria
System Ad...	lizetteg@focusschoolsof	Criteria
System Ad...	lizetteg@focusschoolsof	Criteria

This is where you will set up the criteria that will trigger the workflow. Multiple criteria can be set up. Criteria can be set up by selecting fields and entering values in the table at the top of the Criteria window or by entering a query in the Match Query section at the bottom of the window.

16. Select the correct **Field** from the pull-down.

### Criteria for Absence

Criteria Match Any ☐

Field	On Change	Not	Value
Enrollment: Days Absent	<input type="checkbox"/>	<input type="checkbox"/>	

Match Query

17. Select the **On Change** check box if you want the workflow trigger to take effect upon the selected field being changed. For example, in the image shown, when the Enrollment: Days Absent field is changed, an email will be sent out to the selected recipients.

## Criteria for Absence

### Criteria

Match Any ☐

	Field	On Change	Not	Value
	Enrollment: Days Absent ▼	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

### Match Query

**18.** Select the **Not** check box to add it to the rule you are creating. Using Not is to say an email will be sent when the Field is NOT the Value entered. In the example shown, the workflow will be triggered when the Enrollment: Days Absent field is NOT empty.

## Criteria for Absence

### Criteria

Match Any ☐

	Field	On Change	Not	Value
	Enrollment: Days Absent ▼	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

### Match Query

**19.** Enter the **Value** that will trigger the workflow. For select fields, a list of allowable options will display for selection. In the example shown, the Value is blank/empty.

## Criteria for Absence

### Criteria

Match Any ☐

	Field	On Change	Not	Value
	Enrollment: Days Absent ▼	<input type="checkbox"/>	<input checked="" type="checkbox"/>	empty

### Match Query

**a.** For date fields, such as Annual Review Date, clicking the Value field opens the Date Criteria pop-up window to define the date criteria. Enter the corresponding information, and then click **Save**.

## Criteria for 504 Incomplete

### Date Criteria

Empty

OR

Prior to  day(s)  (Today)

OR

Between:  and

Save or Cancel



Rules on text fields will be hard to enforce since the value must match exactly to trigger the change.

20. When complete, press the **Enter** key to save the data. Upon saving the line turns blue.

## Criteria for Absence

### Criteria

Match Any ☐

	Field	On Change	Not	Value
	*Registrar Notes*: Registrar N... <input type="text"/>	<input type="checkbox"/>		
<input checked="" type="checkbox"/>	Enrollment: Days Absent <input type="text"/>	<input checked="" type="checkbox"/>		


21. Instead of defining criteria by selecting fields and defining the values, a query can be entered in the **Match Query** section of the Criteria window. Requirements for the query are indicated in the yellow box. Shown is an example of a query for W24 withdrawal entered on student enrollment record.



## Criteria for W24 withdrawal entered on student enrollment record

### Criteria

Match Any ☐

Field	On Change	Not	Value
504 Info: 504 3-year Re-Eval ... 	<input type="checkbox"/>	<input type="checkbox"/>	Empty

### Match Query

This query must select a single column aliased as **student\_id**. If this is set, a student will only match this rule if it matches the criteria and its **student\_id** is included in the results.

Valid replacements are **{date}**, **{school\_id}**, **{year}**, **{marking\_period\_id}**, and **{current\_staff\_id}**.

```
select se.student_id as student_id
from student_enrollment se
join student_enrollment_codes sec on sec.id = se.drop_code
where se.year = {SYEAR}
and sec.short_name = 'W24'
and (select max(id) from student_enrollment where seyear = 2021 and student_id = se.student_id and custom_9 is null) = (select max(id)
from student_enrollment where seyear = 2021 and student_id = se.student_id and custom_9 is null and school_id != 31 );
```

Done




**22.** Select the **Match Any** check box to apply the following conditions: The edit rule is met when any of the criteria is matched instead of having to match all of the criteria (each row of criteria is an “or” statement). When the check box is not selected, each row of criteria is an “and” statement.

## Criteria for Absence

Match if the student meets \*any\* of the criteria, rather than \*all\*

### Criteria

Match Any ☐

	Field	On Change	Not	Value
	*Registrar Notes*: Registrar N... 	<input type="checkbox"/>	<input type="checkbox"/>	
	Enrollment: Days Absent 	<input checked="" type="checkbox"/>		

**23.** When all information has been entered/selected, click **Done** at the bottom of the Criteria pop-up to return to the Workflow Triggers tab.

## Criteria for Absence

Criteria

Match Any ☐

Field	On Change	Not	Value
*Registrar Notes*: Registrar N...	<input type="checkbox"/>		
Enrollment: Days Absent	<input checked="" type="checkbox"/>		

Match Query


This query must select a single column aliased as `student_id`. If this is set, a student will only match this rule if it matches the criteria and its `student_id` is included in the results.

Valid replacements are `{date}`, `{school_id}`, `{syear}`, `{marking_period_id}`, and `{current_staff_id}`.

Done

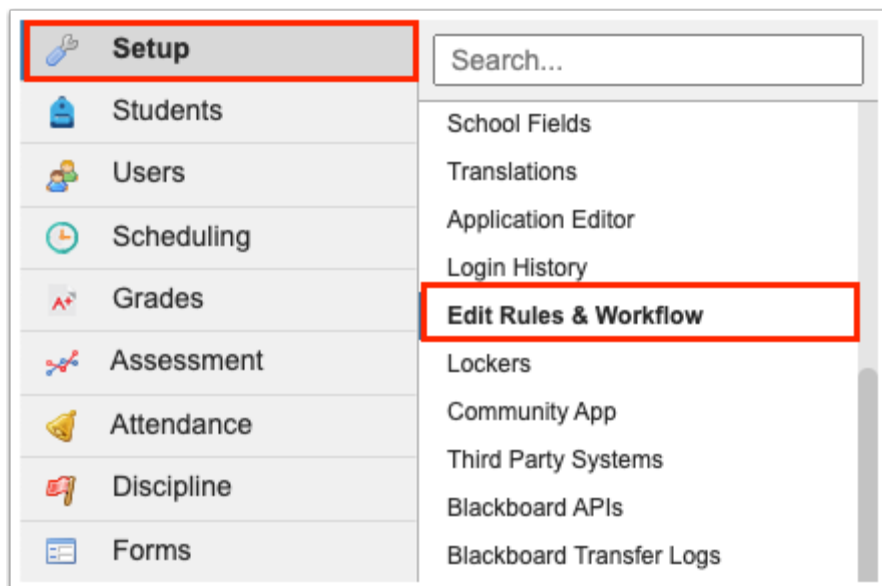
# SQL Triggers

The SQL Triggers feature allows users to trigger Positive Behavior Badges to the Student & Parent Portal based on a query tied to attendance, student, grade, schedule, test history scores, or other applicable tables.

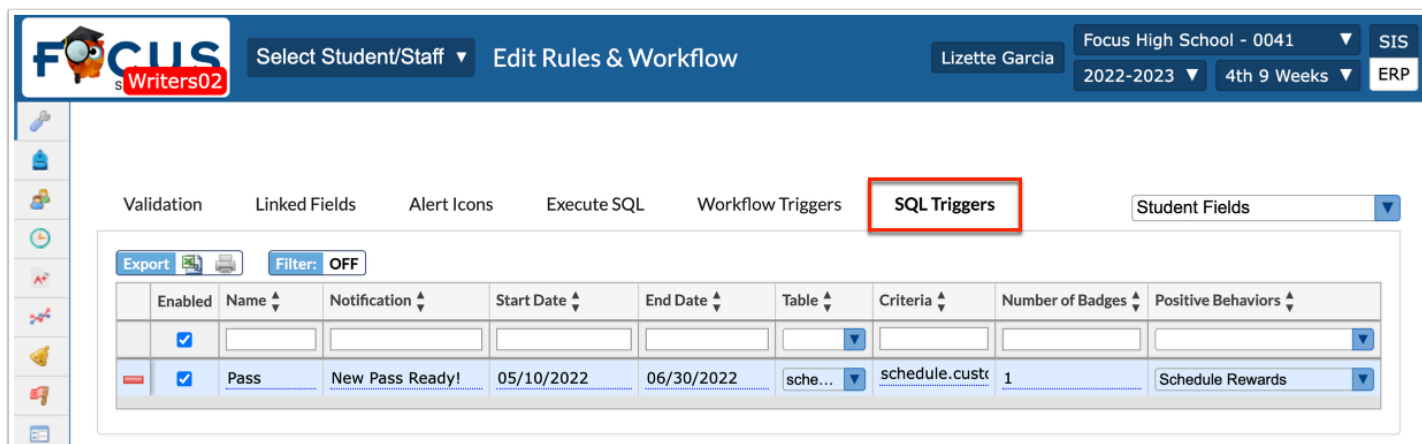


SQL Triggers requires the set up of the scheduled job, **SQL triggers**, via Setup > [Scheduled Jobs](#).

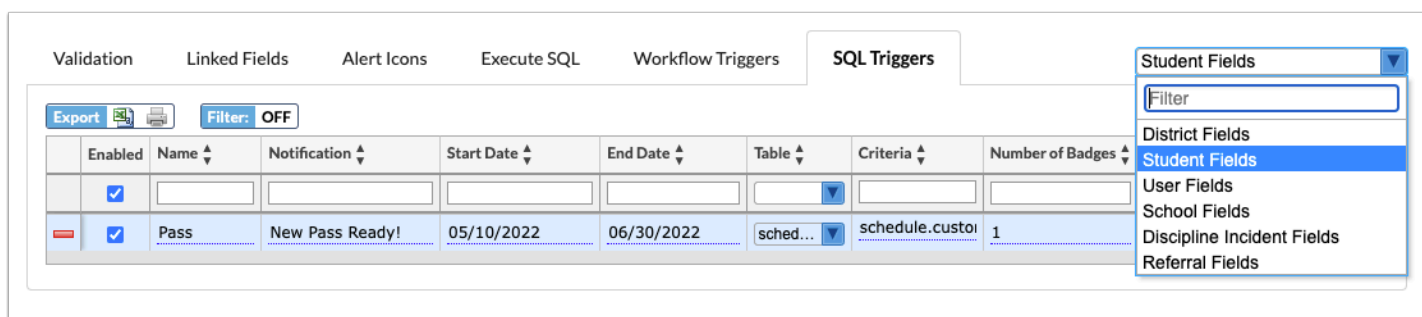
1. In the **Setup** menu, click **Edit Rules & Workflow**.



2. Click the **SQL Triggers** tab to add a new trigger.





3. Before making any alterations to the SQL Triggers tab, be sure to select the correct fields from the pull-down. It defaults to **Student Fields**. The other options include **District Fields**, **User Fields**, **School Fields**, **Discipline Incident Fields**, and **Referral Fields**.



**i** SQL Triggers do not exist for **User Fields, School Fields, Discipline Incident Fields, or Referral Fields.**

4. Any existing SQL triggers are listed in the table. Use the top row of the table to add a new trigger.



Validation Linked Fields Alert Icons Execute SQL Workflow Triggers **SQL Triggers** Student Fields ▼

Export   Filter: OFF

	Enabled	Name	Notification	Start Date	End Date	Table	Criteria	Number of Badges	Positive Behaviors
	<input checked="" type="checkbox"/>					▼			▼
	<input checked="" type="checkbox"/>	Pass	New Pass Ready!	05/10/2022	06/07/2022	sche...	schedule.custc	1	Schedule Rewards

5. The **Enabled** check box is automatically selected. Clear the check box if you do not want the rule to be enforced automatically. This check box is essentially the on/off button.



Validation Linked Fields Alert Icons Execute SQL Workflow Triggers

Export   Filter: OFF

	Enabled	Name	Notification	Start Date	End Date
	<input checked="" type="checkbox"/>				

6. Enter a **Name** for the SQL trigger.

Validation Linked Fields Alert Icons Execute SQL Workflow Triggers **SQL Triggers**

Export   Filter: OFF

	Enabled	Name	Notification	Start Date	End Date	Table
	<input checked="" type="checkbox"/>	Coupon	A coupon is available!			▼

7. Enter the **Notification** for the SQL trigger; the text entered here displays as the notification on the student/portal alert.

8. Select/enter the **Start Date** and **End Date** to assign the timeframe for which the SQL trigger is active. The Start Date is required, but the End Date is optional.

The screenshot shows the 'SQL Triggers' tab in a configuration interface. At the top are tabs for 'Validation', 'Linked Fields', 'Alert Icons', 'Execute SQL', 'Workflow Triggers', and 'SQL Triggers'. Below these are 'Export' and 'Filter: OFF' buttons. A table lists triggers with columns: Enabled, Name, Notification, Start Date, End Date, Table, and Criteria. One trigger is listed: 'Coupon' with notification 'A coupon is available!' and start date '06/08/2022'. The 'End Date' field is empty and has a date picker open. The date picker shows 'June 2022' with the 8th highlighted.

Enabled	Name	Notification	Start Date	End Date	Table	Criteria
<input checked="" type="checkbox"/>	Coupon	A coupon is available!	06/08/2022			



9. Select the **Table** from the pull-down to determine the table to which the query should be applied.

This screenshot shows the same 'SQL Triggers' configuration interface. The 'Table' column in the table now shows a dropdown menu with 'attenda...' selected. A list of tables is displayed below the dropdown, including 'attendance\_day', 'attendance\_period', 'custom\_field\_log\_entries', 'discipline\_referrals', 'gradebook\_grades', 'schedule', 'student\_enrollment', 'student\_report\_card\_grades', and 'students'. A mouse cursor is pointing at 'attendance\_day'.

Enabled	Name	Notification	Start Date	End Date	Table	Criteria	Nu
<input checked="" type="checkbox"/>	Coupon	A coupon is available!	06/08/2022		attenda...		

10. Enter the query in the **Criteria** text box.



Validation Linked Fields Alert Icons Execute SQL Workflow Triggers **SQL Triggers** Student Fields ▼

Export   Filter: OFF

Enabled	Name	Notification	Start Date	End Date	Table	Criteria	Number of Badges	Positive Behaviors
<input checked="" type="checkbox"/>	Coupon	A coupon is available!	06/08/2022		schedule ▼	<div> schedule.custom_39 &gt;  schedule.custom_38 </div>		

**11.** Enter the **Number of Badges** that should be awarded when the SQL is triggered in the provided text box.

Validation Linked Fields Alert Icons Execute SQL Workflow Triggers **SQL Triggers** Student Fields ▼

Export   Filter: OFF

Enabled	Name	Notification	Start Date	End Date	Table	Criteria	Number of Badges	Positive Behaviors
<input checked="" type="checkbox"/>	Coupon	A coupon is availab	06/08/2022		sche... ▼	schedule.custi	2	Schedule Rewards ▼

**12.** Select the **Positive Behaviors** badge(s) from the provided pull-down that should be awarded when the SQL is triggered.

Workflow Triggers **SQL Triggers** Student Fields ▼

Start Date	Table	Criteria	Number of Badges	Positive Behaviors
	sche... ▼	schedule.custi	2	Schedule Rewards ▼

Filter

- A Mask Leader
- Act of Kindness
- Dolphin Pride
- Happy Birthday
- Helping Others
- Kept mask on without reminding
- Met Reading Goal
- Schedule Rewards**
- Wore mask correctly without reminding

**13.** Press the **Enter** key to add the trigger. The line turns blue when it has been added. The information here is auto-saved; there is no save button on this screen.

Validation   Linked Fields   Alert Icons   Execute SQL   Workflow Triggers   **SQL Triggers**   Student Fields ▼

Export   Filter: OFF

	Enabled	Name	Notification	Start Date	End Date	Table	Criteria	Number of Badges	Positive Behaviors
	<input checked="" type="checkbox"/>	Coupon	A coupon is availiab	06/08/2022		sche...	schedule.custc	2	Schedule Rewards

**i** When the scheduled job has run and the SQL has been triggered, the following takes place:

- Badges are pushed out to portal pages, as show in the Student Portal below.
- Discipline > [Positive Behavior Awards](#) report displays the triggered badges.
- District & School Badges are honored.
- Start and End Years are honored.

**Writers02** Portal Charlie Abe (Student) ▼

Portal   School Information   My Information   Change Requests   Preferences   Calendar   Request Conference   Class Schedule   Class Requests

**Charlie**  
Focus High School - 0041

Grades   **News**   Planner   Reports

Wednesday - 06/08/2022

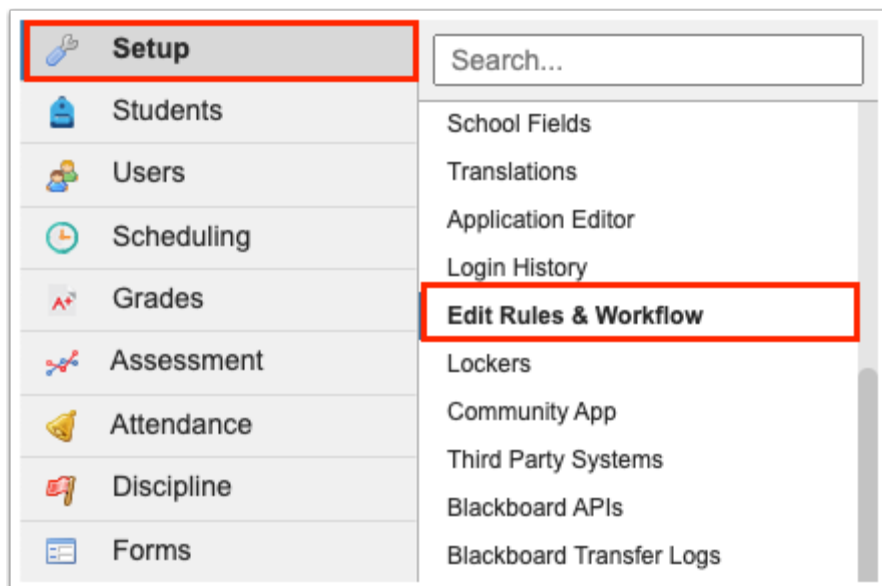
06/08 10:40 AM **Schedule Rewards +1**  
Miranda

New Pass Ready!

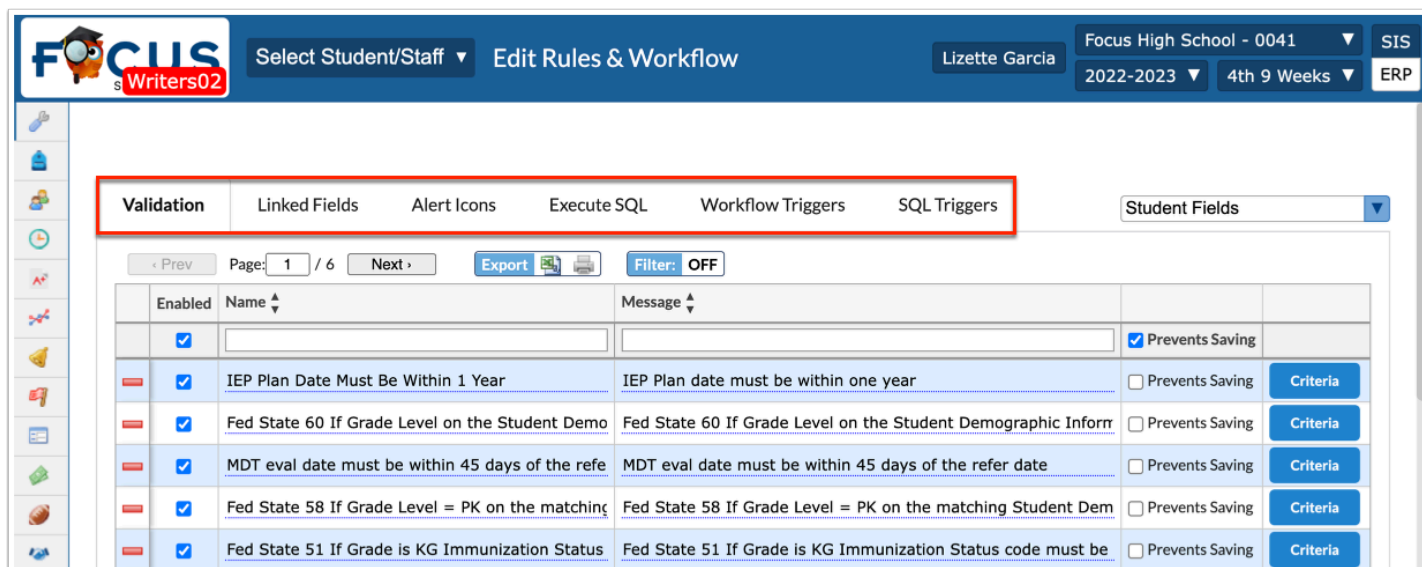
Friday - 05/20/2022

## Editing and Deleting Edit Rules & Workflow

**1.** In the **Setup** menu, click **Edit Rules & Workflow**.



2. Click the applicable tab to edit or delete data.



3. Before making any alterations to the applicable tab, be sure to select the correct fields from the pull-down. It defaults to **Student Fields**. The other options include **District Fields**, **User Fields**, **School Fields**, **Discipline Incident Fields**, and **Referral Fields**.



**Validation**   Linked Fields   Alert Icons   Execute SQL   Workflow Triggers   SQL Triggers

Prev Page: 1 / 6 Next Export Filter: OFF

Enabled	Name	Message
<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	IEP Plan Date must be within one year	IEP Plan date must be within one year
<input checked="" type="checkbox"/>	Fed State 60 If Grade Level on the Student Demogra	Fed State 60 If Grade Level on the Student Demographic Information
<input checked="" type="checkbox"/>	MDT eval date must be within 45 days of the refer da	MDT eval date must be within 45 days of the refer date
<input checked="" type="checkbox"/>	Fed State 58 If Grade Level = PK on the matching St	Fed State 58 If Grade Level = PK on the matching Student Demogra

Student Fields  
Filter  
District Fields  
Student Fields  
User Fields  
School Fields  
Discipline Incident Fields  
Referral Fields  
☐ Prevents Saving Criteria  
☐ Prevents Saving Criteria  
☐ Prevents Saving Criteria

4. Click any of the fields displayed to make edits. You can also select or clear check boxes and change selections made from pull-downs. Changes save automatically.

**Validation**   Linked Fields   Alert Icons   Execute SQL   Workflow Triggers   SQL Triggers   Student Fields

Prev Page: 1 / 6 Next Export Filter: OFF





Enabled	Name	Message		
<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/> Prevents Saving	
<input checked="" type="checkbox"/>	IEP Plan Date Must Be Within 1 Year	IEP Plan date must be within one year	<input type="checkbox"/> Prevents Saving	Criteria
<input checked="" type="checkbox"/>	Fed State 60 If Grade Level on the Student Demogra	Fed State 60 If Grade Level on the Student Demographic Information	<input type="checkbox"/> Prevents Saving	Criteria
<input checked="" type="checkbox"/>	MDT eval date must be within 45 days of the refer da	MDT eval date must be within 45 days of the refer date	<input type="checkbox"/> Prevents Saving	Criteria
<input checked="" type="checkbox"/>	Fed State 58 If Grade Level = PK on the matching St	Fed State 58 If Grade Level = PK on the matching Student Demogra	<input type="checkbox"/> Prevents Saving	Criteria
<input checked="" type="checkbox"/>	Fed State 51 If Grade is KG Immunization Status cod	Fed State 51 If Grade is KG Immunization Status code must be 0, 1,	<input type="checkbox"/> Prevents Saving	Criteria

5. Click the Criteria, Linked Fields, Alert Icon, and/or Execute SQL button to edit additional information.

From the applicable pop-up window, you can change the selection from pull-downs, clear or select check boxes, and edit text boxes. Changes saves automatically.

## Criteria

Match Any ☐

	Field	On Change	Not	Value
	*Registrar Notes*: Registrar N... ▼	<input type="checkbox"/>	<input type="checkbox"/>	
	ESE: ESE Exceptionalities - IE... ▼	<input type="checkbox"/>	<input type="checkbox"/>	Prior to 365 days before today
	ESE: ESE Exceptionalities - E... ▼	<input type="checkbox"/>	<input checked="" type="checkbox"/>	L - Gifted ▼
	ESE: ESE Exceptionalities - S... ▼	<input type="checkbox"/>	<input type="checkbox"/>	A - Active ▼
	Enrollment: School ▼	<input type="checkbox"/>	<input checked="" type="checkbox"/>	John McKay Scholarship - 3518 ▼

## Match Query


This query must select a single column aliased as `student_id`. If this is set, a student will only match this rule if it matches the criteria and its `student_id` is included in the results.

Valid replacements are `{date}`, `{school_id}`, `{year}`, `{marking_period_id}`, and `{current_staff_id}`.

Click the **delete** button (red minus sign) to delete criteria, linked fields, etc. from within the different pop-up windows.

## Linked Fields for Survey Completed Checked

At least one row is required for this rule to be evaluated

	Field	Value
	*Registrar Notes*: Registrar N... ▼	
	Edit Rules & Workflow: Survey... ▼	Verified ▼

Done

6. Click the **delete** button (red minus sign) on any of the tabs to delete the entry and all attached criteria.

Validation
Linked Fields
Alert Icons
Execute SQL
**Workflow Triggers**
SQL Trig

Export
Filter: OFF

	Enabled	Name	Type	Letter	Affected Student	Affected Student Personal Email	Affected Parent	Letter L
	<input checked="" type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Studen	E..	W.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Active	P..		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Addres	P..		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Absenc	E..	A..	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Absenc	E..	A..	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Absenc	E..	A..	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

a. From the confirmation pop-up window, click **OK**.

sandbox.focusschoolsoftware.com says  
Are you sure you want to delete this record?

Cancel
OK

## Did You Know?

When set up via [Alert Icons](#), the **Covid Symptoms Alert** displays for 14 days after the date noted in the Covid Symptoms Date field when enabled via Students > [Student Fields](#). The alert displays the Covid Symptoms Date in the tool-tip.

Focus Writers02 Student Info

Abe, Charlie Noel

55879 - 10

Lizette Garcia

Focus High School - 0041

2022-2023

4th 9 Weeks

SIS

ERP

Enrollment Schedule Requests Grades Absences Activities Referrals Test History Audit Trail Grad

ISP Page Files SSS Choice Billing

Filter fields...

FC Federal/State Compensatory

FS Food Service

F Forms

GD General Demographics

G Gifted

G Graduation

Health Daily Health Screener

General Demographics

Print a Form/Letter

Export Filter: OFF

Attendance Method	Start Date	End Date	Days of the Week
RA - Remote Asynchronous	08/01/2022	12/31/2022	M - Monday, W - Wednesd...

Covid Symptoms Date 07/14/2022

Threat Classification

Applicable in [Executive SQL](#): ORDER BY can cause a query to break in MSSQL unless used with TOP or FETCH first. Focus now validates edit rule queries before being saved, so you can apply ORDER BY for use on MSSQL.

## Additional Features

If the tab contains several pages of information, **Page** numbers will displays along with **Prev** and **Next** buttons. Utilize these buttons to sift through pages. Click the **Page** text box to enter a page number. Press **Enter** to jump to that page.

Validation Linked Fields Alert Icons Execute SQL Workflow Triggers SQL Triggers

Prev Page: 2 / 5 Next

Export Filter: OFF

Enabled	Name	Message
<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	Home Language survey date cannot be 0 or greater t	Home Language survey date cannot be 0 or greater than today
<input checked="" type="checkbox"/>	Fed State 26 If Homeless Student, PK-12 code is A, E	Fed State 26 If Homeless Student, PK-12 code is A, B, D, E or F, H
<input checked="" type="checkbox"/>	Fed State 26 If HomelessStudent, PK-12 code is N, H	Fed State 26 If HomelessStudent ,PK-12 code is N, Homelessness
<input checked="" type="checkbox"/>	Fed State 43 If Homeless Student, PK-12 code is A, E	Fed State 43 If Homeless Student, PK-12 code is A, B, D, E or F, U

To export the data to an Excel spreadsheet, click on the **Excel** icon in the **Export** section.



Validation Linked Fields Alert Icons Execute SQL Workflow Triggers SQL Triggers Student Fields

Export Filter: ON

Enabled	Name	Message	Prevents Saving	Criteria
<input checked="" type="checkbox"/>	Fed State 26 If Homeless Student, PK-12 code is A, B, D,	Fed State 26 If Homeless Student, PK-12 code is A, B, D,	<input type="checkbox"/>	Criteria
<input checked="" type="checkbox"/>	Fed State 26 If Homeless Student, PK-12 code is N, Homel	Fed State 26 If Homeless Student, PK-12 code is N, Homel	<input type="checkbox"/>	Criteria
<input checked="" type="checkbox"/>	Fed State 43 If Homeless Student, PK-12 code is A, B, D,	Fed State 43 If Homeless Student, PK-12 code is A, B, D,	<input type="checkbox"/>	Criteria
<input checked="" type="checkbox"/>	Fed State 43 If Homeless Student, PK-12 code is N, Unacc	Fed State 43 If Homeless Student, PK-12 code is N, Unacc	<input type="checkbox"/>	Criteria

- To add more than one filter to a column, click on the **green plus sign**.
- To delete an added filter, click on the **red minus sign**.
- Select the **gray arrow** for more filtering options.

For more information, see [Filters](#).

Click on any of the headers to sort data. Click once for ascending results; click twice for descending results. In the image shown, results have been sorted by clicking on **Name** twice; therefore, the listed data starts with Z.

Validation Linked Fields Alert Icons Execute SQL Workflow Triggers SQL Triggers Student Fields

Prev Page: 1 / 6 Next Export Filter: OFF

Enabled	Name	Message	Prevents Saving	Criteria
<input checked="" type="checkbox"/>	Zoned DISTRICT must be greater than 00 if Zoned S	Zoned DISTRICT must be greater than 00 if Zoned SCHOOL is great	<input type="checkbox"/>	Criteria
<input checked="" type="checkbox"/>	Validate the Homeless fields - Homeless Student PK-	Validate the Homeless fields - Homeless Student PK-12, Homeless C	<input type="checkbox"/>	Criteria
<input checked="" type="checkbox"/>	Validate the Homeless fields - Homeless Student PK-	Validate the Homeless fields - Homeless Student PK-12, Homeless C	<input type="checkbox"/>	Criteria
<input checked="" type="checkbox"/>	SSN Proper Format	SSN Proper Format	<input type="checkbox"/>	Criteria
<input checked="" type="checkbox"/>	SSN can't be zero filled. If there is no ssn then leave	SSN can't be zero filled. If there is no ssn then leave blank.	<input checked="" type="checkbox"/>	Criteria
<input checked="" type="checkbox"/>	Social Security for Adult Ed Students is Missing.	Social Security for Adult Ed Students is Missing.	<input type="checkbox"/>	Criteria
<input checked="" type="checkbox"/>	Prior School 2F If Educational Choice code = A, then	If Educational Choice code = A, then School Number, Zoned School I	<input type="checkbox"/>	Criteria
<input checked="" type="checkbox"/>	Prior School 2E If Educational Choice code = A, then	Prior School 2E If Educational Choice code = A, then District Numbe	<input type="checkbox"/>	Criteria
<input checked="" type="checkbox"/>	Prior 42 If the 'Prior District/County' is 99, then the 'I	Prior 42 If the 'Prior District/County' is 99, then the 'Prior State/Terri	<input type="checkbox"/>	Criteria

Use the **Filter** text box located at the top of the pull-down for a quick search. Begin typing the name of the desired field.



☐

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☒

☒ Exact

[Check all](#)

[Clear](#)

☐

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System Admin View

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System Admin Support

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System Administrator

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