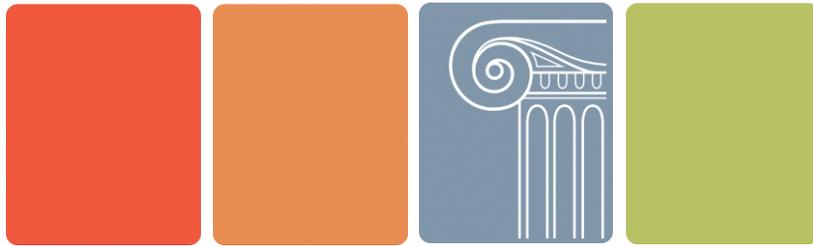


AXIOM

USER MANUAL





AXIOM MANUAL

The Axiom application framework acts in service of the entire Veracross platform, providing easier and more refined ways for administrative staff to navigate, query, and work with data across all modules of the system.

This manual will define Axiom concepts, provide documentation of features, and give step by step instructions for many Axiom functions.

CONTENTS

▶ OTHER RESOURCES	5
▶ PART 1 – NAVIGATION	
AXIOM NAVIGATION OVERVIEW	6
Key Components	
Basic Navigation	
LAUNCHPAD	8
Launchpad	
Favorites	
Search	
History	
Workspaces	
Help	
Keyboard Shortcuts	
HOME PAGES	13
Overview	
Homepage Design	
Functionality Overview	
SEARCH	16
Overview	
Search Icon Glossary	
▶ PART 2 – QUERIES & RESULTS	
QUERIES & RESULTS OVERVIEW	17
Overview	
Query Templates	



Query Fields
Query Criteria
System Parameter Criteria Values

QUERY DESIGN	23
Basic Query Design	
Field Properties	
Keyboard Shortcuts	
Running the Query	
Query Totals and Subtotals	
Summary Queries	
QUERY RESULTS	31
Query Properties and Results	
Calendar Results Visualization	
Map Results Visualization	
URL Preview Visualization	
QUERY RESULTS MANAGEMENT & ACTIONS	37
Managing Queries and Results	
Query Results Actions	

► **PART 3 – RECORD MANAGEMENT**

RECORD MANAGEMENT OVERVIEW	41
DETAIL SCREENS	42
Adding a Record	
Multi-Select Tabs	
Updating Records	
Deleting Records	
Audit Log	
RELATED RECORDS	46
Overview	
Managing Related Records	
RECORD ACTIONS	49
Overview	
Person Record Actions	
Household Record Actions	
Query Actions	
Bookmarking Records	

► **PART 4 – WORKSPACES**

WORKSPACES OVERVIEW	51
----------------------------------	-----------



Personal vs. Shared Workspaces

WORKSPACE ORGANIZATION.....	52
Creating a Workspace	
Renaming a Workspace	
Moving a Workspace	
Assigning a Workspace to a Homepage	
Deleting a workspace	
UTILIZING WORKSPACES.....	56
Bookmarks	
Reports	
MANAGING BOOKMARKS AND RECORDS.....	59
Copying a Report to another Workspace	
Moving a Report to another Workspace	
Removing a Report or Bookmark from a Workspace	
Favorites	



OTHER RESOURCES

In addition to this manual, other resources have been developed to make learning Axiom easier. These additional resources come in the form of quick reference guides, short training videos, and the complete printed Axiom Manual.

Quick Reference Guides

Quick reference guides are one page visual descriptions of Axiom functionality. These guides should be a go to resource for average users. Having some available, even printed out, should help every day users become more comfortable with Axiom. The following quick reference guides are available [here](#).

- Homepages
- Launchpad
- Basic Query Design
- Advanced Query Design
- Query Results
- Detail Screens
- Workspaces

Axiom Training Videos

Short Training Videos give new Axiom users the chance to experience training from where they are. Each Video will feature a simple, short training session on one aspect of Axiom. One video is available at launch.

- [Query Design](#)

NAVIGATION

AXIOM NAVIGATION OVERVIEW

KEY COMPONENTS

Axiom navigation is made up of three components: **Homepages**, the **Launchpad**, and **Search**. Through each of these components users can access all areas of the system. The Launchpad remains with the user as they navigate from page to page and allows for quick navigation between homepages, detail screens, saved queries, and more.

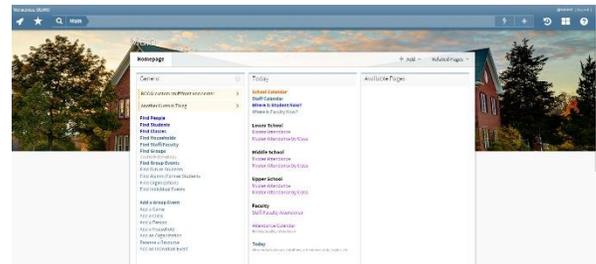
Launchpad



The [Axiom Launchpad](#) is a navigation toolbar that provides quick access to areas of the system and user features such as activity history and saved queries. The Launchpad remains at the top of each page as users navigate through Axiom. In addition to navigation, the Launchpad also becomes the place where queries, reports, and other action items become active and available for the user to update, run, and more.

Homepages

Each department within the school has a corresponding [homepage](#). These homepages are exactly the same as the set featured in ES2, but have been redesigned according to the specific job functions of each department. Homepages are made up of a set of query templates and reports, making it easy to get to the needed data.



Search



The [search bar](#) is a component of the Launchpad and allows users to search by name for major areas of the system, such as homepages, people, query name, reports, and more.



BASIC NAVIGATION

Homepage to Homepage

When first logging into Axiom, all users are directed to the Main homepage. This is the default page and where users can return to at any time for basic functions such as running Find People queries, viewing calendars, or Today's Attendance. Navigate to similar homepages using the "Related Pages" dropdown located in the upper right of the homepage currently being viewed. To view a complete list of all homepages, use the  icon in the Launchpad.

Page to Page

There are several ways to navigate between pages:

1. Use the Launchpad to view a list of Homepages, access saved queries, Workspaces, and more. The Launchpad remains at the top of each page being viewed, so options for navigating to other areas of the system are always available.
2. Click on links from any homepage to view query templates and reports.
3. Search for any areas within the system using the search bar in the Launchpad.
4. Return to previous pages in Axiom, use the browser back button.
5. Return to the homepage by clicking on the homepage button in the Launchpad search bar.

Additionally, depending on the type of page, alternative navigation options may be available. These additional navigation options will appear as clickable buttons on the right of the blue search bar. The label of the button will change depending on the area of the system.

For example: when viewing a query result, a "Design" button will appear within the blue search bar. Clicking on this button will navigate back to the query design page. A button to "Run Query" will also be available within the blue search bar.

Opening Links

Right click on any link in Axiom to either open it in a new window or a new tab.



LAUNCHPAD

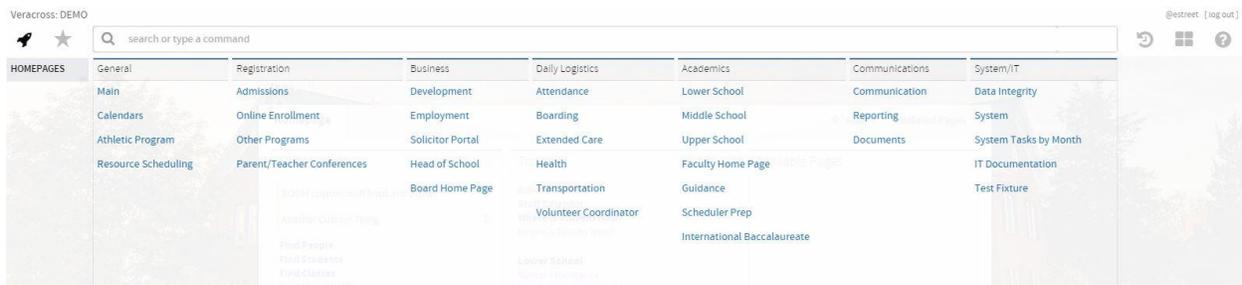
OVERVIEW

The Axiom Launchpad is a navigation toolbar that provides quick access to areas of the system and user features such as activity history and saved queries. Users can return to the Launchpad at any time to jump between homepages, access saved queries, search for things in the system, and more. There are six main components of the Launchpad:

- **LAUNCHPAD:** access all Homepages and Common Links.
- **FAVORITES:** access all personal and shared “favorite” queries, reports, and more.
- **SEARCH:** search for any area of the system including homepages, people, detail screens, and more.
- **HISTORY:** view past activity in the system.
- **WORKSPACE:** library of personal and shared folders.
- **HELP:** access help from Veracross documentation.

The Launchpad remains with the user as he/she navigates through each area of the system. Certain homepages and other detail screens, depending on their function and use within the system, will have additional components of the Launchpad available for use as these pages are accessed. These features are “Actions” and “Organize” and are located within the search box in the Launchpad. If they are unavailable they will be greyed-out; when they become available they will turn into a clickable button.

LAUNCHPAD

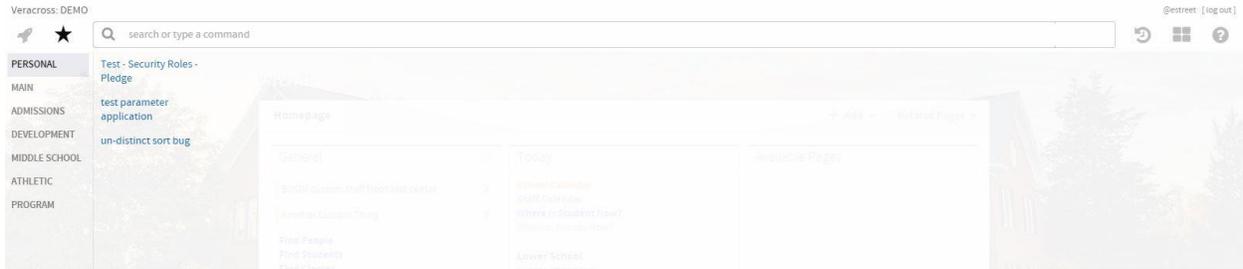


Use the Launchpad to view a list of all homepages available in Axiom. These homepages are the same as the set available in ES2, but have been organized by homepage groups. Homepage groups are the major areas of the system such as Registration, Daily Logistics, Academics, and more. When users open a new homepage, the current homepage they are on will display by name in the search bar. This acts as the “home” button for that homepage, so as users drill into links from that



page at any time they can navigate back to the homepage by clicking on the name button.

★ FAVORITES



The Favorites section of the Launchpad displays all queries or reports that have been “starred” by the user or been saved to a shared query category. Use the Favorites section to organize and store frequently accessed queries or reports. All other saved queries or reports should be saved in either a personal or shared Workspace.

Organization

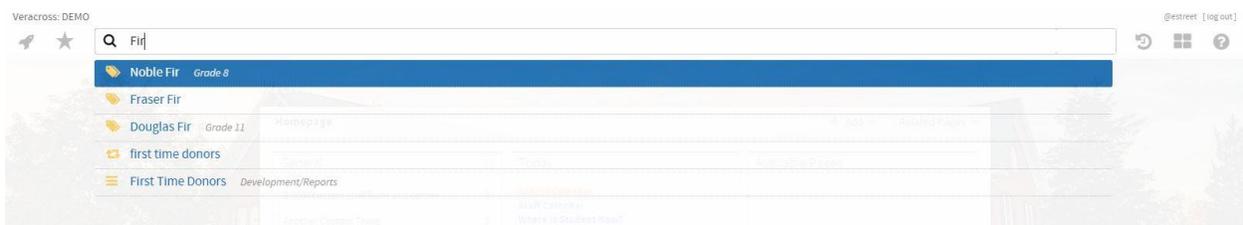
Query Categories are listed down the left side. Hover over each category to view all queries or reports that have been marked as favorites (i.e. starred).

Saving to Favorites

All queries or reports that are displayed in the Favorites section must first be saved to a Workspace as either a personal bookmark or report or a shared bookmark or report. Use the + icon to save the query as report as desired. Switch the "Display in Favorites" toggle button to "Yes" so it will appear in the correct Query Category in the Favorites section. By default it is set to "No."

Queries or reports may also be saved to Favorites from any personal or shared Workspace by selecting the icon next to the description.

🔍 SEARCH



The Search bar allows users to search by name or command for major areas of the system, such as homepages, people, query names, and reports. As the user enters a



search term, suggested terms will appear based on the search, making it is easy to quickly click on an option and jump to that area of the system.

As the user navigates between pages, other components of the search bar will become available. The first is the “most recent navigation” button. This will either be a Homepage or a Workspace from which the page now being viewed was accessed. This acts a “home” or “back” button to direct the user to the original starting place of their navigation so they can easily get back to where they started. The next piece of information contained in the middle of the search bar indicates to the user where they currently are, that is what page is currently being viewed. These two pieces of information are meant to assist with navigation and orientation within Axiom. Additional two icons will become available depending on the information contained on the current page:

- **⚡ Actions:** a collection of options specific to the detail screen, homepage, or query result currently being viewed. These options usually relate to performing a large system function based on the information contained on the page being viewed (e.g. when on the Admissions homepage an action item might be “Create Missing Person Enrollment Records”).
- **+ Organize:** options for creating personal bookmarks or reports or for other organization related tasks such as moving Workspaces.

Visit the [Search section](#) for more information on searching in Axiom.

HISTORY



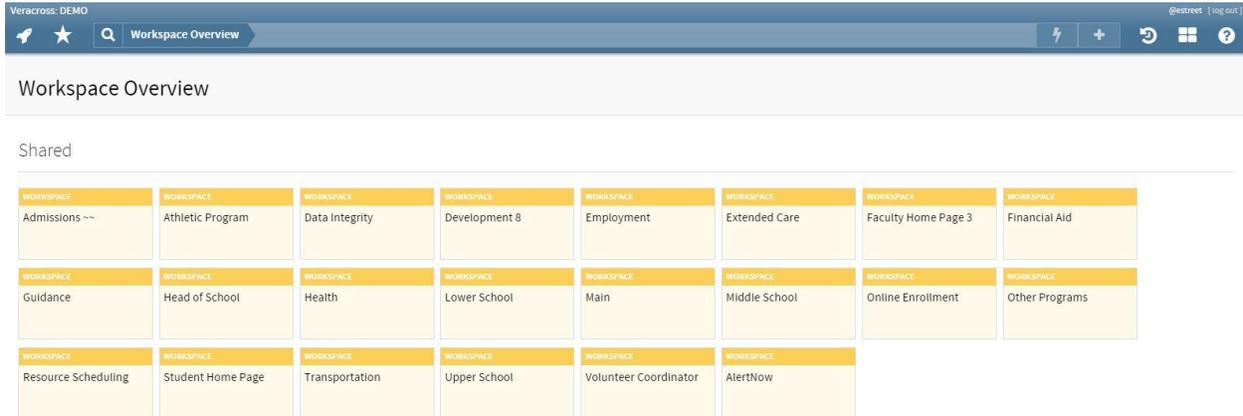
The History section of the Launchpad displays all recent activity conducted in Axiom. This is the equivalent of the “URL History” feature in ES2 and the page breadcrumbs in ESWeb. Activities are tagged according to their function within the system so the user can quickly scan to see what queries, reports, homepages, workspaces, etc. were accessed in the recent past. Each activity listed links back to that specific activity conducted.

For example: if a user runs the “Find Person Admission” query using the search criteria of “Fir” for the person name, clicking on the result link from the activity will



return the user to the exact results returned for this particular query at that point in time.

WORKSPACES



Workspaces are personal or shared collections of queries and reports organized around a particular function or homepage. Personal Workspaces are specific to the user and can be anything from saved queries integral to his/her job function or system queries for quick access. Shared Workspaces are grouped by homepage and include links to frequently used queries or reports.

Workspaces can contain three things:

1. **Other Workspaces:** sub-workspaces within the main Workspace category.
2. **Queries or Reports:** a copy of a system query or report which, when run, is independent of the actual query or report this was copied from.
3. **Bookmarks:** references a report (usually a system report) from an area of the system. When the report is run from its bookmarked Workspace, the actual report that is housed in the other area of the system (e.g. Admissions homepage) will be run.

As the user navigates in Workspaces the “most recent navigation” button will display the parent Workspace name so it can easily be navigated back to.

Visit the [Workspaces section](#) for more information on using Workspaces in Axiom.

HELP

The Help section links to the Veracross documentation site modules.veracross.com, where additional information about Veracross processes, products, procedures, and more can be found.



KEYBOARD SHORT CUT

Use the keyboard shortcut ~ (tilde) to activate the Homepage list in the Launchpad from any page.



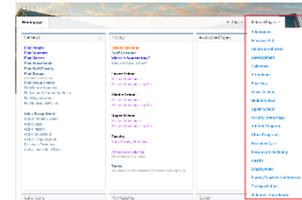
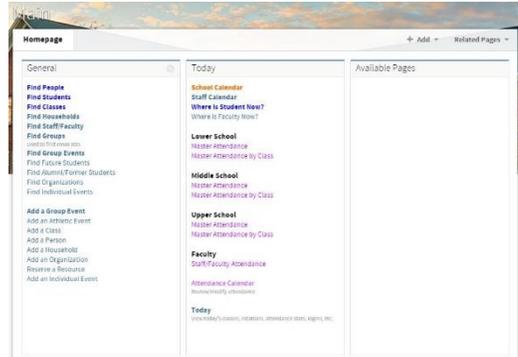
HOMEPAGES

OVERVIEW

Homepages are a collection of links including query templates, reports, other homepages, and more. These pages are designed around a particular job function or task making it easy to quickly access the data necessary for that job.

When first logging into Axiom users are directed to the Main homepage. There are two ways to access other homepages in Axiom:

1. **Launchpad:** view a complete list of all homepages from any page using the  icon. Homepages are organized by homepage groups which represent the major areas of the system.
2. **Related Pages:** the “Related Pages” dropdown located in the right corner of a homepage displays a consolidated list of all homepages according to its relationship to the homepage currently being viewed.



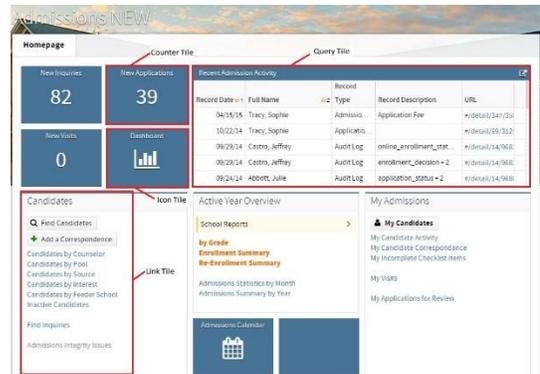
HOMEPAGE DESIGN

Homepages in Axiom are designed to help users access the data they need quickly and efficiently. While the order of data contained on homepages remains largely the same as that found in ES2, Axiom homepages feature a refreshed design which makes the grouping of query and report links more clearly organized around daily tasks and functions pertaining to the specific job function to which the homepage applies.

Homepage Tiles

Data contained on homepages are organized into homepage tiles. A tile is a single box containing a collection of query templates and reports all related to a particular task or activity according to the function of the particular homepage. Tiles are configured to display the content based on the type of information. There are four types of tiles:

- **Link Tiles:** the most common type of tiles found on a homepage. It contains





links to other queries or reports within the system related to that subject of that particular tile. For example, when on the Admissions homepage a link tile with the subject “Today” will contain links to all queries or reports necessary for reviewing Admissions data that requires attention today.

- **Counter Tiles:** powered by a report(s), a counter tile displays a summarized view of a report’s result. For example, on the Admissions homepage a counter tile may be configured to display “Today’s New Inquiries” and “New Applications.” The total number received for today will display in a box to easily view the current activity. Users can access details of this report from a counter tile by clicking on the summary information.
- **Icon Tiles:** tile contains a single link to a report or external Veracross program, such as the Admissions Dashboard, that provides specific, significant information.
- **Query Tiles:** powered by the results of a specific query, such as a calendar. The tile will display the results of the query on the homepage. The user can click on the tile to access the query design to modify the results according to their current data needs.

Consolidated View

Certain tiles may have an additional consolidated view which allows access to configuration or parameters specific to the main function of that tile. The consolidated view may be accessed by clicking on the  icon in the upper right corn of the tile. Most often this will appear on either a “General” or an “Other” tile. These links are important in setting up or defining values in the system, but are not necessary to display all the time.

For example: the  icon in the “Other” tile on the Admissions homepage provides links to two parameter, Active Admissions Year and Admissions Ref date, and two configuration pages, Admissions Fee Types and Admissions Amount. These four links are important to the operation of the Admissions department, but usually only require one time setup.



FUNCTIONALITY OVERVIEW

Homepages are made up a collection of links organized by section. There are four types of links that can be accessed from a homepage:

1. **Find Queries** – links to query for locating specific information from the system such as the “Find Person” or “Find Group Event” queries.
2. **Add Records** – links to records for adding new data into the system such as “Add Household” or “Add Class.”



3. **Reports** – links to reports that provides data based on a set of criteria such as “New Inquiries” or “Today’s Attendance.”
4. **Configuration** – links to configuration records that assists in setting up a particular area of the system according to the school’s specifications such as “Review Class Configuration” or “Admission Portal Configuration.”

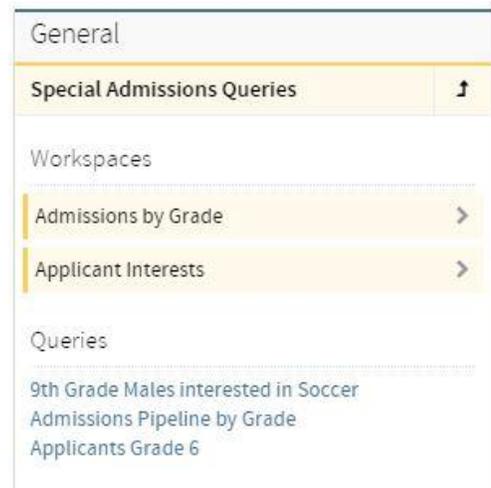
Links are organized into sections on the homepage and are grouped by link type.



Additionally, at the top of a homepage, quick access options for frequently accessed Find queries and Add records are available. Links within these sections are specific to the homepage currently being viewed.

Workspaces on Homepages

Frequently accessed queries and reports can be saved to a homepage using [Workspaces](#). Workspaces are assigned to a specific homepage section using the organize **+** icon from the Workspace detail page. The main Workspace will be displayed at the top of the homepage section. When a user clicks on the Workspace from the homepage, it expands within the homepage section to reveal the sub-workspaces (if any), queries, and reports saved in that Workspace without navigating away from the homepage. Users will only be able to save Workspaces to homepages to which they have access.





SEARCH

OVERVIEW

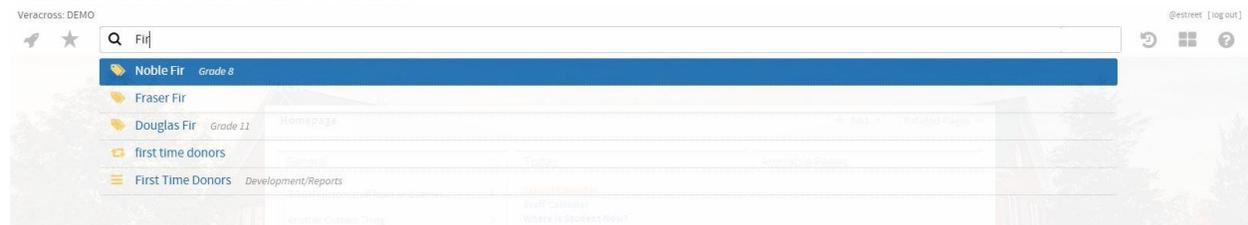
The Search bar is a feature of the Launchpad that allows the user to access other areas of the system from anywhere in Axiom. There are two kinds of searches:

1. **Metadata:** search for information-holding areas of the system such as homepages, Workspaces, class records, and more.
2. **Staff, Faculty, Students:** search by name for a specific constituent within the system.

As users search for a specific term, suggested terms will appear from either search type.

For example: Searching for a person with the last name “Fir” will display suggested search terms of all people with the last name Fir in the database as well as any term that contains the those beginning letters, such as the “First Time Donors” report.

SEARCH ICON GLOSSARY



Each type of search that may be conducted is assigned a specific icon to enable quick browsing within the suggested search results.

-  - external link to documentation.
-  - Axiom homepages.
-  - school constituent records, such as students, faculty, and staff.
-  - reports or configuration.
-  - find queries.
-  - add queries.
-  - general queries.

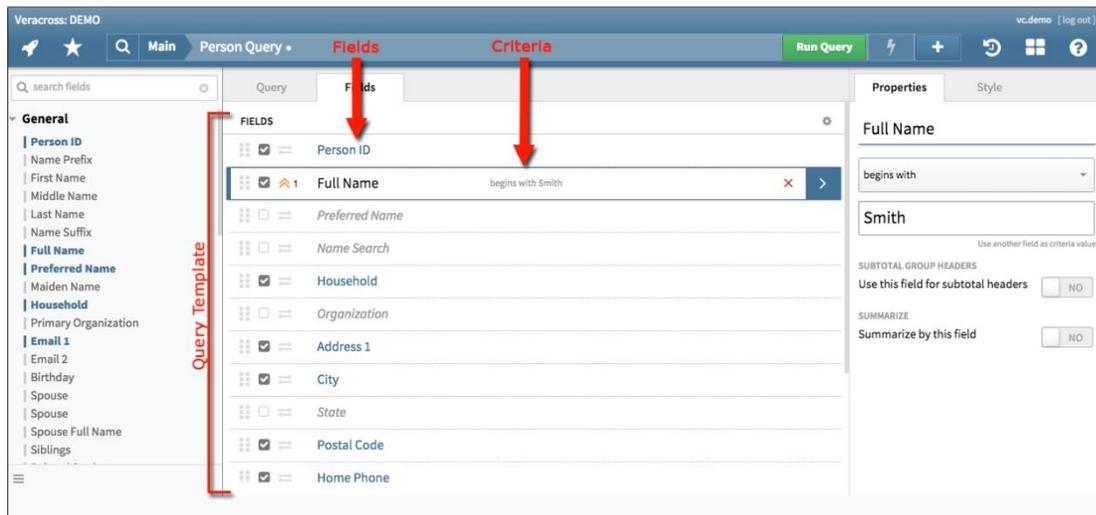


QUERIES & RESULTS

QUERIES & RESULTS OVERVIEW

OVERVIEW

A query is a structured question used to retrieve data from the system. It can be modified and filtered as necessary to produce a specific set of results. This section of the documentation provides detailed information pertaining to the process of understanding what queries are and how to use the robust Axiom query tool. The main parts of a query include the query template, query fields, and any criteria applied to the fields.



Query Templates

The data for various “entities” in the system exists in tables (an entity can be a person, a household, a class, etc.). Veracross refers to these entities as "records." Query templates are preset queries that allow users to interact with the tables in the system to find data.

Query templates serve as the starting point for any modified query. Visit the documentation on [query templates](#) for more information about using templates.

Query Fields

A field is a place in which to put a piece of data associated with a record (i.e. a “last name” field from a person record). Fields are what make up the structure of a query and are used to specify what data should be pulled from the system.

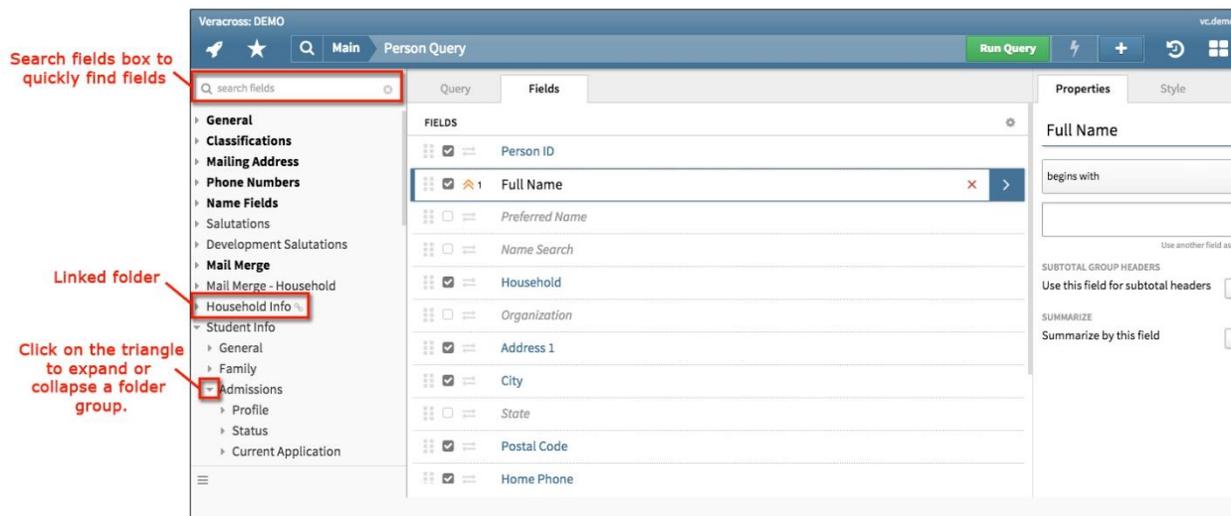
Visit the [field types](#) documentation for a list of the different field types.

Query Criteria

Criteria are used to modify the content of a query by filtering the information within a field. Adding query criteria narrows the number of results to provide users with more specific data. Query criteria have two parts – the operator and the value.

Visit the documentation on [query criteria](#) for details on how to set criteria on a given field.

QUERY TEMPLATES



The data on various records (i.e. person, household, class, etc.) in the system exists in tables. Query templates are preset queries that allow users to interact with the tables in the system to find data. Each template represents one table in the system.

For example: to pull data on a person, a user would use the corresponding person query template to retrieve data from the person table.

Query templates are made up of a series of fields that structure what data the query should pull from the system. A field represents a place in which to store a piece of data associated with a record (for example, a “last name” field from a person record).

Templates serve as the starting point for any modified query, and the query template used determines which fields can be added to the results.

Folders & Fields

The available fields in a query template are organized into main folders and subfolders that can be found in the left column of the query design. To expand a folder, click on the Triangle to the left of the folder name. Similarly, click on the triangle a second time to



compress the folder.

The name of a folder that contains fields already added to the query will appear in black bolded font. Within a folder, any fields already added to the query will appear in blue bolded font.

Linked Folders

Some folders may have a link icon to the right of their names, which indicates that they are “linked” folders. A linked folder is a folder that contains fields associated with another record in the database. Fields in a linked folder pull data from a different table in the system.

For example: “Household Info” is a linked folder within a person query. Though a household and a person are two separate record types in the system, users can simultaneously query a person’s household data while querying data from the person record.

Searching for New Fields

Although the fields in a query template are organized into folders, a user can quickly search for a field by typing a keyword into the “search fields” box located above the list of folders. Any available fields containing that keyword will appear in a list below.

Keyboard Shortcuts

Several keyboard shortcuts exist to allow the user to more easily navigate the list of folders and fields. Available shortcuts include:

SHORTCUT	DESCRIPTION
(\) key on keyboard	Puts the cursor in the “search fields” box
(UP/DOWN) arrows on keyboard	When searching for fields to add to a query, scroll through the available fields using the up/down arrows
(ENTER) key on keyboard	When searching for fields to add to a query, adds the highlighted field to the query
(ESC) key on keyboard	After searching for fields, returns to the main list of folders and fields

QUERY FIELDS

A table is a collection of all of the data associated with a record type in the system. Each record type, such as a person or a household, has its own table. Data is arranged in tables to make it easier to query and to link to other records.

A field is a place in which to store a piece of data associated with a record (for example,



a “first name” field from a person record). Fields are what make up the structure of a query and are used to specify what data should be pulled from the system.

Real Field vs. Calculated Field

Fields can be either real or calculated. A real field is an updatable field; its value is whatever a user enters into the system. A calculated field is a field with a value determined from other data in the system and cannot be manually updated.

For example: a person’s birthdate is a real field; whatever the user enters as the date will be the value for that person. A person’s age field is a calculated field; its value is based solely on the birthdate listed in the system, and therefore can only be changed by changing the birthdate value.

Field Types

When data is queried it can be displayed in a variety of ways, depending on the type of field to which the data is tied. The following list explains the different field types:

FIELD TYPE	DESCRIPTION
<i>Single Line Text</i>	Data displayed on one line (i.e. a person “full name” field).
<i>Multi Line Text</i>	Data displayed on several lines (i.e. a household “multi-line mailing address” field).
<i>Rich Text</i>	Data displayed in html formatting such as underlined or bolded text (i.e. a student comment for review).
<i>Email</i>	Data displayed as a hyperlinked email address (i.e. a person “email 1” field).
<i>URL</i>	Data displayed as a hyperlinked web address (i.e. a person enrollment “preview contract” field).
<i>Number</i>	Data displayed in numeric form (i.e. a person “age” field).
<i>Boolean</i>	Data displayed as “yes” or “no” (i.e. a person “has F/A application” field). In the results, this data can also be displayed with a check for “yes” and no check for “no.”
<i>Date</i>	Data displayed in date form (i.e. a person “birthday” field).
<i>Time</i>	Data displayed in time form (i.e. a group event “start time” field).
<i>Checkbox List</i>	Data displayed as a predefined set of values that come from another table (i.e. a student “homeroom” field)
<i>Join Field</i>	Data displayed from fields that join explicitly to another record, noted by the ellipses button (...) adjacent to the criteria value text box that can be clicked to search that joined record. (i.e. a class “course” field)

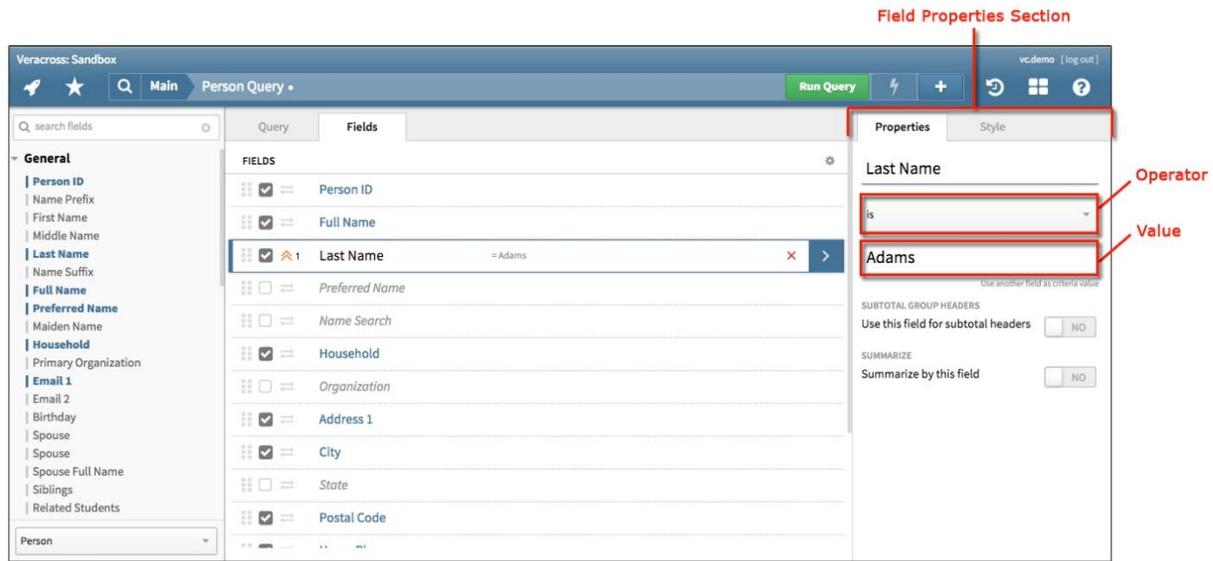


QUERY CRITERIA

Criteria is used to modify the content of a query by filtering the information within a field. Adding query criteria narrows the number of results to provide the user with more specific data.

Query criteria has two parts: the operator and the value. The operator is how a field should be filtered, and the value is what data should be used as the filter.

Types of Operators



Different field types have different available operators. The following list details the different operator types:

OPERATOR TYPE	DESCRIPTION	AVAILABLE OPERATORS
Text Operator	Filters based on words or digits (or the lack thereof)	is, is not, is blank, is not blank, begins with, does not begin with, contains, does not contain, contains word, ends with, does not end with, is greater than, is less than, is greater than or equal to, is less than or equal to
Number Operator	Filters by numbers or number ranges	is equal to, is not equal to, is greater than, is less than, is greater than or equal to, is less than or equal to
Date Operator	Filters by dates or date ranges	date is, date is not, date is blank, date is not blank, date is after, date is before, date is on or after, date is on or before



Checklist (GKC) Operator	Filters based on selections from a checklist associated with that field	is one of, is not one of, contains all of, contains exactly
---------------------------------	---	---

Adding Criteria to a Query

To add criteria to a field in a query, first click on the field within the query design. The field properties section will appear to the right. The drop-down menu beneath the field name contains all of the available operators for that field (based on the operator type).

Select the appropriate operator from the list, and then enter the criteria value(s) below. Depending on the field type, values can be added as text, as a date, from a checklist, etc.

For example: to search for people with the last name of “Adams,” a user would apply criteria to the last name field on a person query. The operator would be set to “is” and the value would be set to “Adams,” which would then filter the results to display only those people with a last name of Adams.

System Parameter Criteria Values

A system parameter is a value based on calculated settings in the system that adjust automatically. System parameters in queries are most often associated with dates or times and allow users to regularly query certain information without the need to update the criteria each time.

For example: to query group events scheduled for the current date, the user can apply the system parameter {today} as the criterion, which will automatically pull in today’s date. Whenever the user needs to run the query, he/she can continue using the same query design rather than manually inserting the current date each time the query is needed.

System parameters must be contained in curly brackets { } when used as criteria values. Visit the documentation on [system parameters for queries](#) for a full list of available parameters that can be used in queries.

Other Field Criteria Values

Other fields in a query can be used as criteria values. This functionality is helpful in cases where data from two separate records should be checked against each other.

For example: if a user wanted to find any cases where a person has that same email address listed in the email 1 and email 2 fields, he/she would run a person query where the "email 1" value is equal to the "email 2" value.

To enter another field as a criteria value, click the “use another field as criteria value” link, located below the criteria value text box, and select the field to be used as the criteria from the list that appears.



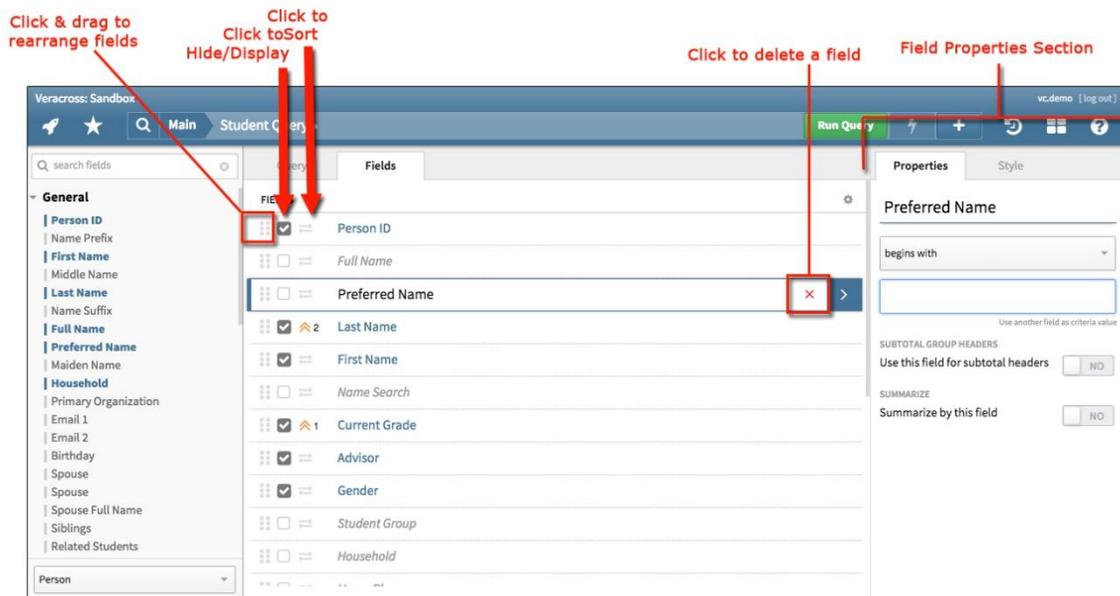
QUERY DESIGN

BASIC QUERY DESIGN

A query is a structured question used to retrieve data from the system. The data for various record types in the system exists in tables (a record can be a person, a household, a class, etc.). Query templates are preset queries that allow the user to interact with the tables in the system to find data.

Query templates serve as the starting point for any modified query. These query templates can be modified and filtered as necessary to produce a specific set of results, and the query template used determines which fields can be added to the results. The template used depends on the type of record that the user wants to query.

For example: to query data associated with a person record, the template used should be a person query (i.e.: Find People, Find Students, Find Candidates, etc.). Similarly, to query data associated with a household record, the template used should be the household query.



Adding & Removing Fields

The fields available in a query template are organized into folders that can be found in the left column of the query design screen. To expand or compress a folder, click on the triangle to the left of the folder name. To quickly search for a field, type a keyword into the “Search Fields” box located above the folders. Any available fields containing that keyword will appear in a list below.



The name of a folder that contains fields that have already been added to the query will appear in black bolded font. Within a folder, any fields already added to the query will appear in blue bolded font.

To add a new field to a query, click once on the field name. To remove a field, place the cursor over the field in the query and click the red X that appears to the right.

Rearranging Fields

The order in which fields are listed in the query is the same order in which fields are listed in the results. To change the field order, simply click on the rearrange icon – located in the first column to the far left of the field name – and drag the field to its new location.

Displaying & Hiding Fields

A field can be part of the query without being displayed in the results. When a new field is added to a query, the default setting is to display the field. To hide a field, click on the checkbox located in the middle column to the left of the field's name. When the box is unchecked the field is hidden. To display a field, simply click on the checkbox again. Note that even if a field is hidden, criteria can still be applied to filter the results. To quickly hide all fields at once, click on the gear icon at the top right corner of the query design and select "Hide All Fields." Similarly, to quickly display all of the fields at once, select "Display All Fields." Select the option called "Rearrange All Fields by Display Status" to quickly move all displayed fields at the top of the list.

Sorting Results

The results of a query can be sorted based on one field or multiple fields.

For example: a student query can be sorted only by last name, or first by grade level and then by last name.

To sort by a field, click on the sorting icon (two horizontal arrows) located in the third column to the left of the field name. Clicking once turns on sorting in ascending order, noted by the upward-facing arrows. Click on the icon a second time to sort instead by descending order, noted by the downward-facing arrows.

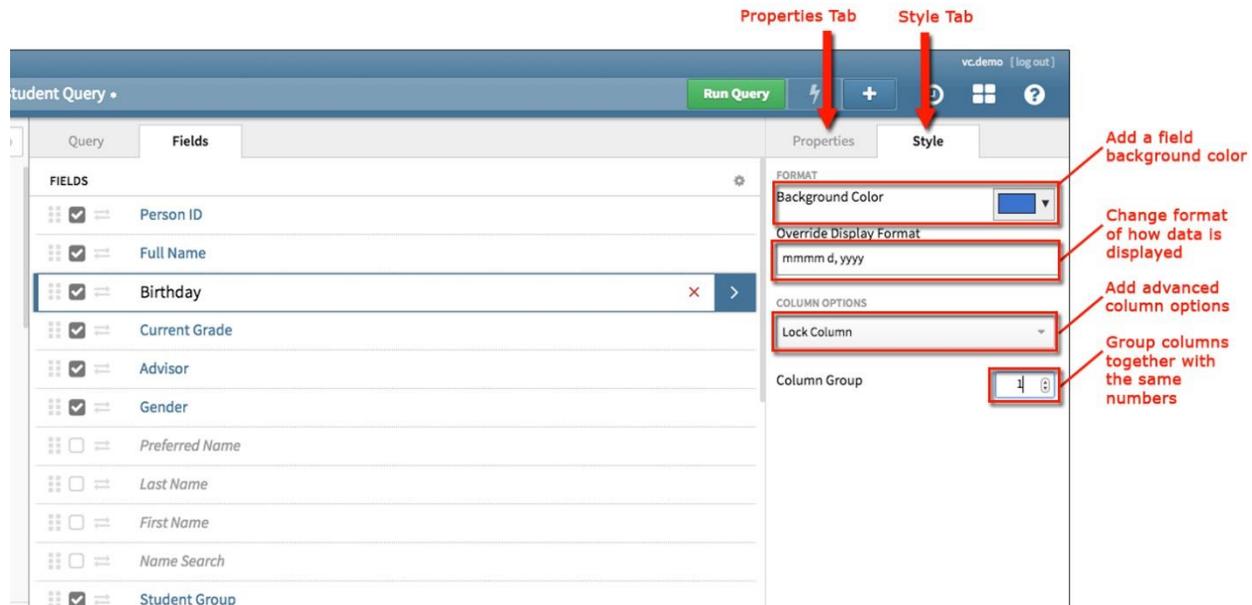
To sort by multiple fields, click the icons in the order the fields should be sorted. The number that appears to the right indicates the order.

To turn off sorting, hold down the SHIFT key while clicking on the icon.

Sorting can also be done from the results screen. To sort a column in the results data grid, simply click once on the column header. This will sort the column in ascending order. To sort in descending order, click the column header a second time. Sorting changes made within the query results will persist if the query is run a second time.



FIELD PROPERTIES



Field properties are settings that allow users to customize how the data from a field appears in the results. To access field properties, click on the field name within the query. The field properties section will appear to the right of the query design, separated into “Properties” and “Style” tabs.

Renaming Field Description

Field names become the column headers in the results grid. To change a field name, first select the field from the query. In the field properties section, click on the current field name and then type what the new name should be into the box.

Changing Column Background Color

Users can also customize results by adding a background color to columns in the results grid. To add a background color, select the field from the query and click on the “Style” tab in the field properties section to the right. Click on the “Background Color” color menu and then select a color from the spectrum. Colors can also be selected by entering a hexadecimal code (a six-digit number used to represent colors) into the box below the color spectrum.

Overriding Display Format

The way certain data is formatted in query results can be changed based on a user’s preferences.

For example: a user may want a date to appear in the results with the month spelled out, rather than in the traditional mm/dd/yy format.



To change a display format in query results, select the field from the query, click on the “Style” tab of the field properties section, and enter the new format into the “override display format” box.

Override display formats are generally universal and are most often used with dates and times. The following are some of the more common format overrides:

	FORMAT	DESCRIPTION
DATES	m	Month as a number with no leading zeros
	mm	Month as a number with leading zeros
	mmm	Three letter abbreviation of the month (i.e. Dec)
	mmmm	Full name of the month (i.e. December)
	d	Day as a number with no leading zeros
	dd	Day as a number with leading zeros
	ddd	Three letter abbreviation of the day of the week (i.e. Mon)
	dddd	Full name of the day of the week (i.e. Monday)
	yy	Two digit year
	yyyy	Four digit year
TIMES	h	Hour as a number with no leading zeros
	hh	Hour as a number with leading zeros
	m	Minutes as a number with no leading zeros
	mm	Minutes as a number with leading zeros
	s	Seconds as a number with no leading zeros
	ss	Seconds as a number with leading zeros



Column Groups

Users can group together columns of data to give a clearer visual display of results. Columns can be grouped together if they are next to each other in the query.

To create column groups, select a field from the query, click on the “Style” tab of the field properties section, and assign a column number in the "column group" box. Add subsequent columns to the group by repeating the process and assigning them the same column number. When columns are grouped together, the description of the first field in the group will be used as the group header.

Advanced Options

In addition to adding background colors and grouping columns, users can also apply a series of advanced options to columns to further customize the visual display of query results:

COLUMN OPTION	DESCRIPTION
<i>Highlight When Populated</i>	Any spaces containing data in the column will be highlighted
<i>Highlight When Not Populated</i>	Any spaces missing data in the column will be highlighted
<i>Highlight When Data Invalid</i>	Spaces in the column where data is invalid will be highlighted
<i>Highlight Alternating Groups</i>	Subsequent spaces containing like data in this column will be grouped together by alternating highlights
<i>Lock Column</i>	Freezes that column, as well as all columns to the left, in place to allow the user to maintain a view of that column’s contents while simultaneously scrolling through the remaining columns
<i>Suppress from Export</i>	Column data is displayed in the results grid but is not included in a data export
<i>Suppress from Results</i>	Column data is not displayed in the results grid

To set an additional column option, select the field from the query and click on the "style" tab in the field properties section, and then choose the appropriate option from the "column options" drop-down list.

It is important to note that only one column option can be applied to a field at a time.

KEYBOARD SHORTCUTS

Several keyboard shortcuts exist to allow the user to more quickly navigate and manage queries. Available shortcuts include:



SHORTCUT	DESCRIPTION
<i>(ENTER) key on keyboard</i>	Equivalent of clicking the “run query” button in query design
<i>(~) key on keyboard</i>	From a homepage, quickly opens the rocket ship window (list of available user homepages)
<i>(SHIFT) + (~) keys on keyboard</i>	From a homepage, quickly opens user favorites window
<i>(/) key on keyboard</i>	From a homepage, opens the search window
<i>PC: (CTRL) + (S) or Mac: (CMD) + (S)</i>	From a detail screen, saves any updated data

RUNNING THE QUERY

Once a query contains the necessary fields, criteria, and properties settings, generate the results by clicking the green “Run Query” button at the top right of the screen. As a shortcut, hitting the ENTER key on the keyboard will also run the query.

The query results will appear on a new screen. To return to the query design screen to make adjustments to the query, click on the “Design” button to the left of the “Run Query” button.

Most query results are displayed in a data grid, but results can also be displayed as a calendar, on a Google map, or as a URL document preview. Visit the [query properties](#) documentation for details on changing the results visualization.

QUERY TOTALS AND SUBTOTALS

The system allows for various types of totaling and subtotaling on numeric fields in a query. If no numeric field already exists, the generic "record count" field can be added to a query to allow (sub)totaling. The following list details the types of (sub)total options available:

(SUB)TOTAL TYPES	DESCRIPTION
<i>Sum</i>	Adds all of the values of a field together
<i>Average</i>	Averages all of the values of a field together
<i>Maximum</i>	Displays the greatest value in a range of results (i.e. in a range of grades, this total/subtotal type will show the highest grade)
<i>Minimum</i>	Displays the smallest value in a range of results (i.e. in a range of grades, this total/subtotal type will show the lowest grade)



Totals vs. Subtotals

Totals apply to all records in a numeric field, whereas subtotals only apply to subgroups of all the records.

To establish totaling in a query, click on the numeric field to be totaled and select the total type from the drop-down at the bottom of the field properties section.

The process to establish subtotalling in a query is slightly different from the process for totaling. Users must first select which field(s) to subtotal by, and then set the subtotal type on the associated numeric field.

For example: to find the average posted grades for a class using a posted grades query, the field to subtotal by would be the "Class" field, and the associated numeric field to subtotal would be the "Grade: Posted" field with a subtotal type of "average."

To select a field to subtotal by, click on the field and then toggle the "use this field for subtotal headers" option, located in the field properties section, to yes. Once the subtotal group header has been turned on, set the subtotal type on the numeric field by clicking on the field to be subtotaled and then selecting the subtotal type from the appropriate drop-down in the field properties.

It is important to note that subtotalling only becomes available on numeric fields once another field in the query has subtotal group headers turned on.

It is possible to both subtotal and total simultaneously.

For example: to find the average age of students in 4th and in 5th grade, and then find the average age of all of the 4th and 5th grade students combined, the user would subtotal by the "current grade" field, and the associated numeric field to subtotal would be the "age" field, with both a subtotal type of "average" and a total type of "average."

Fields with (sub)totals applied are distinguished by a sigma symbol (Σ) to the right of the field in the query.

Ignore Zeros for Averages

When using the average (sub)total type, the user can opt to exclude values of zero from the average. This means that a numeric field with a value of zero will not count against the average. Take the example of averaging posted grades in class: if a student does not yet have a posted grade, the numeric value is zero. Turning the "ignore zeros for (sub)totals" option on will ensure that the lack of a grade does not bring the class average down.



To ignore zeros when averaging, simply toggle the “ignore zeros for (sub)totals” option, located at the bottom of the field properties section, to yes.

SUMMARY QUERIES

A summary query is a query where seeing the total of records for a specific field value is more important than seeing each individual record with that value. Users can select which fields are summarized, and the query results will show totals based on distinct values within each summarized field. When summarizing fields within a query, only the summarized field values along with record count are shown in the results.

Selecting Summary Fields

Most fields are eligible to be summarized in a query. The fields that cannot be summarized are numeric fields (i.e. a "Grade: Posted" field) due to their lack of distinct values. To set a summary field, click on the field and then toggle the “summarize by this field” option – located at the bottom of the field properties section – to yes. If multiple fields are summarized, the system prioritizes summaries by the sorting order.

Record Count Field

The initial results of a summary query show only those summarized field values with associated records and their record count. The record count field in a summary query shows the number of records associated with that field value and appears as hyperlinked text.

To view more detailed data from the associated records, drill into the summary query by clicking on the hyperlinked record count number. All records for that field value will appear in a new results grid. The information displayed in the new results grid is determined by the remaining fields from the original query.

Summary Totals

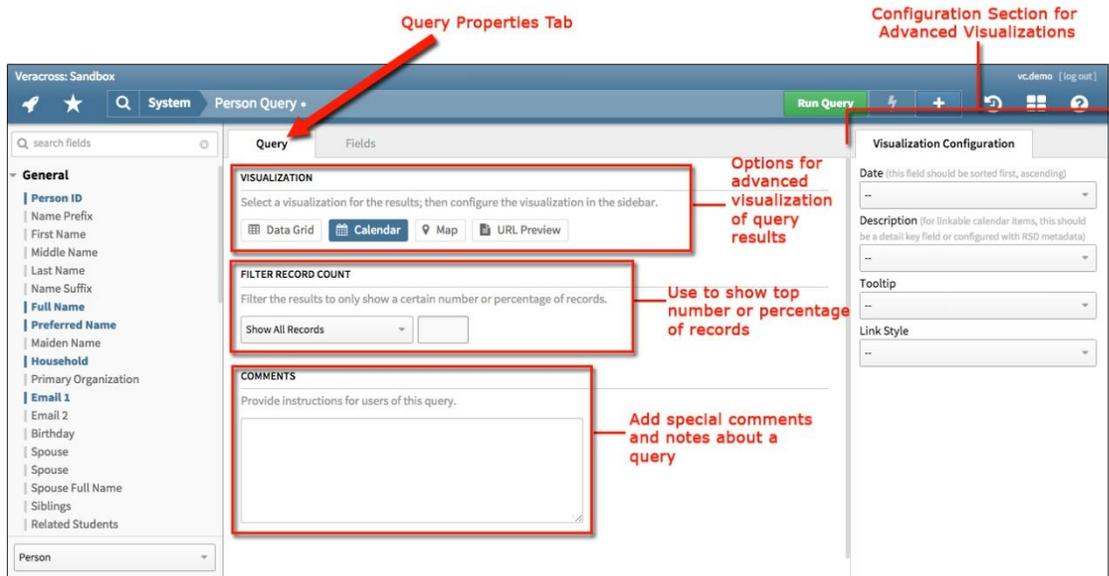
When a field is summarized in Axiom, the query results will automatically add a summary totals row in order to display totals for any field summarized.

For example: if a user summarizes the Grade Applying For field in a "Find Candidates" query, the results will show not only the sum of candidates in each grade, but the total number of candidates across grades. That total shows up below the list of grade totals.



QUERY RESULTS

QUERY PROPERTIES AND RESULTS



Query properties are settings that allow the user to customize how results are shown. To access query properties, click on the “query” tab located above the query structure. Query properties allow the user to change how results are visualized, filter the top records, and even make instructional notes for a query.

Results Visualization

Most query results are displayed in a data grid, but results can also be displayed as events on a calendar, as locations on a map, or as a URL document preview. To change the results visualization for a query, navigate to the query properties tab and select the new visualization.

The more advanced visualizations – calendars, maps, and URL previews – require additional configuration to tell the system which field(s) to base the visualization on. Once selected, the configuration section will appear to the right.

For more details, visit the documentation on [calendar results](#), [map results](#), or [URL preview results](#).

Top Records

At times, the user may want to view only a certain number of results from a query. To set a query to display only a certain number of records in the results, go to the query properties section and select “Show Top <N> Records” from the Filter Record Count



drop-down menu. Enter the number of records in the box to the right. The records displayed will be the “top records,” or the first records displayed in the query based on sorting.

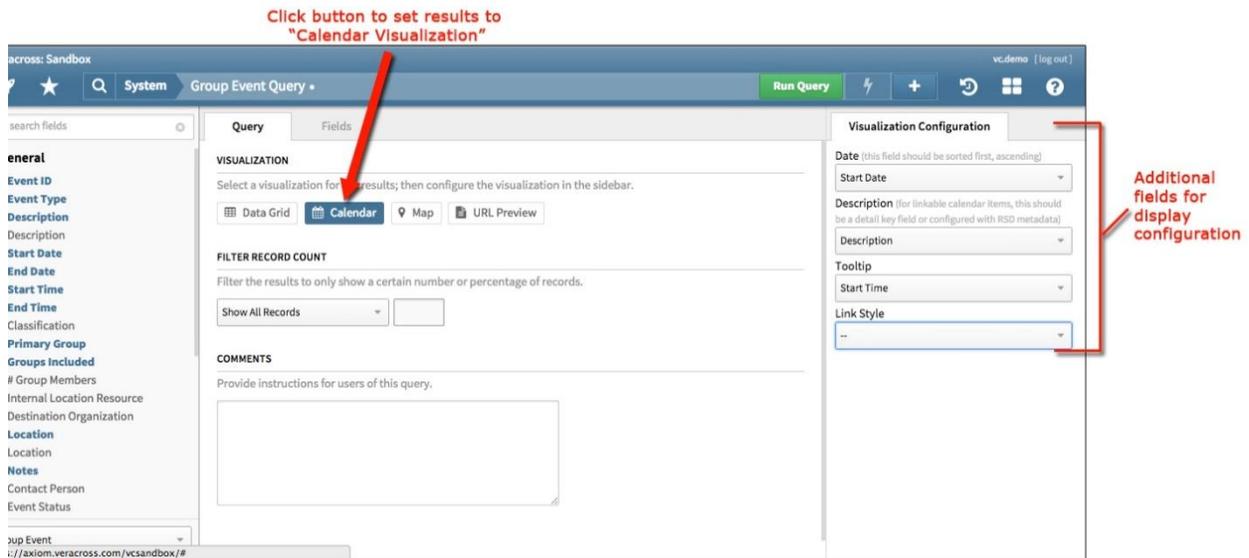
Similarly, to set a query to display only a certain percentage of records in the results, select “Show Top <N>% Records” from the Filter Record Count drop-down menu in the query properties section and enter the numeric percentage in the box to the right.

CALENDAR RESULTS VISUALIZATION

Some data – such as group events, person birthdays, or class assignments, is better displayed in calendar form, rather than in a list. When querying these kinds of data, users can change the results visualization to a calendar output.

To change the results visualization for a query, navigate to the query properties tab, located above the query structure, and select the “Calendar” option. Once selected, the configuration section will appear to the right.

Configuring Calendar Visualization



Advanced visualizations like calendars require additional configuration to tell the system which field(s) to base the visualization on. Calendar configuration involves several possible fields:

FIELD	DESCRIPTION
<i>Date</i>	The content of the field selected controls where results are placed on the calendar, and therefore must be a field that contains a date. There must be a field selected here in order for the calendar visualization to work properly. <i>Please note: this field should be sorted in ascending order.</i>



<i>Description</i>	The content of the field selected becomes the name of the record on the calendar. There must be a field selected here in order for the calendar visualization to work properly. <i>Please note: only certain fields will appear as linkable calendar items.</i>
<i>Tool Tip</i>	The content of the field selected appears when the cursor is placed over a record on the calendar.

Navigating Calendar Results

The screenshot shows a calendar interface for 'Veracross: Sandbox' with a 'Group Event Query' search. The calendar grid displays events from Sunday to Saturday for the month of December 2008. A sidebar on the right shows a vertical list of dates from July 2008 to July 2009, with a bar graph representing the density of events. A red box highlights the current date range (December 2008) in the sidebar. Annotations include: 'Results displayed in a calendar view' pointing to the main grid, 'Calendar Sidebar with bar graph representation of data' pointing to the sidebar, and a note about the highlighted box in the sidebar.

Displaying results as a calendar can sometimes produce a long report. The calendar sidebar provides an easy way for users both to scroll quickly between calendar data and to see a graphic representation of the amount of data throughout the calendar.

The calendar sidebar is located to the far right of the results screen and shows the entire date range of the query results. The section of the date range that is currently displayed appears in a highlighted box. To quickly jump to another part of the calendar, simply click on that part of the date range on the calendar sidebar.

The calendar sidebar also contains a bar graph representation of the amount of data in each section of the calendar. This representation allows the user to easily see where there are higher concentrations of calendar items.

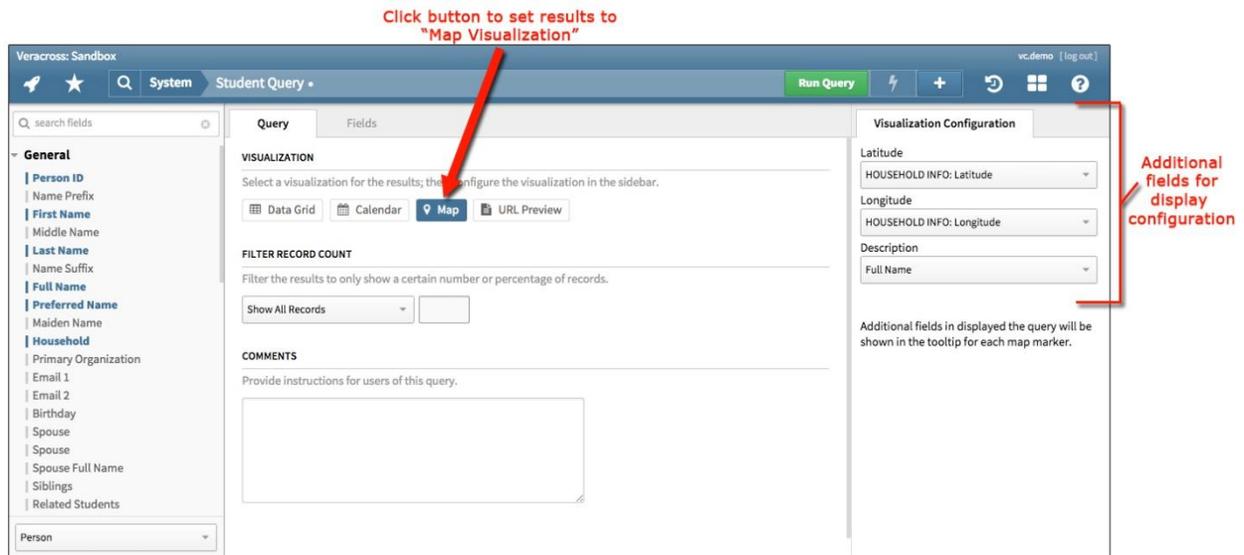
MAP RESULTS VISUALIZATION

Some data, such as a household address, is better displayed on a map, rather than in a list. When querying this kind of data, the user can change the results visualization to a map output (powered by Google maps).



To change the results visualization for a query, navigate to the query properties tab – located above the query structure, and select the “Map” option. Once selected, the configuration section will appear to the right.

Configuring Map Visualization

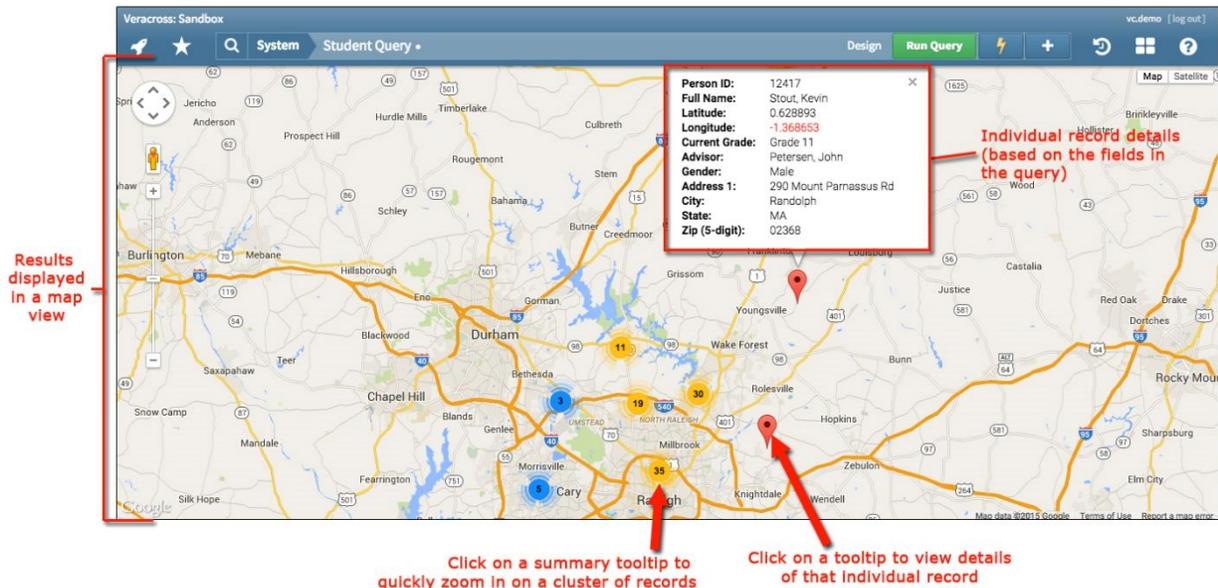


Advanced visualizations like maps require additional configuration to tell the system which field(s) to base the visualization on. Map configuration involves three possible fields:

FIELD	DESCRIPTION
<i>Latitude Field</i>	Indicates the latitude of a specific address. The latitude field must be selected here in order for the map visualization to work properly. <i>Please note: the latitude field must first be added to the query before it can be selected in the configuration.</i>
<i>Longitude Field</i>	Indicates the longitude of a specific address. The longitude field must be selected here in order for the map visualization to work properly. <i>Please note: the longitude field must first be added to the query before it can be selected in the configuration.</i>
<i>Description</i>	The content of the field selected appears when the cursor is placed over a record on the map.



Navigating Map Results



All query results on a map are displayed as part of the “tooltip.” The tooltip contains the data associated with a given point on the map. When a map is zoomed out, nearby tooltips are grouped together in one summary tooltip. The number on the summary tooltip indicates how many tooltips have been grouped together. As a map is zoomed in, fewer tooltips are grouped together.

To quickly zoom in on one section of the results map, click on the summary tooltip. Depending on the proximity of the addresses, the user may have to zoom in on several summary tooltips before a single tooltip is shown on the map. Click on a single tooltip to view all of the data associated with that record (based on the fields in the query).

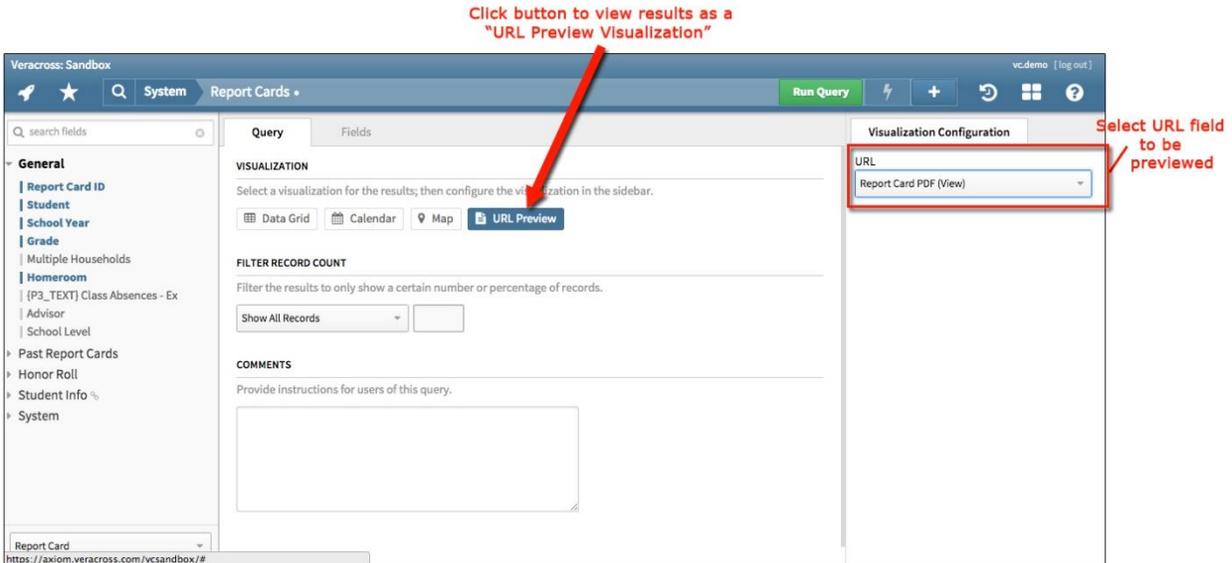
URL PREVIEW VISUALIZATION

Documents generally appear in a results query as an external link. To preview documents from within query results, rather than by visiting an external link, the user can change the results visualization to a URL preview.

Configuring URL Preview Results

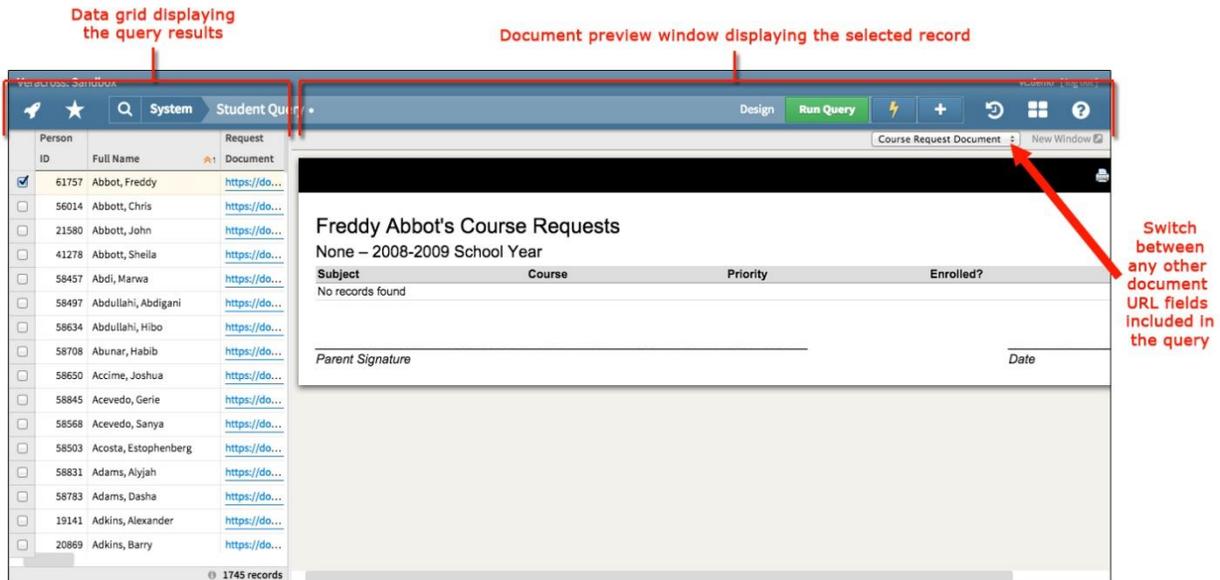
To change the results visualization for a query, navigate to the Query Properties tab, located above the query design, and select the “URL Preview” option. Once selected, the configuration section will appear to the right.

Configuration for URL Preview visualization only involves one field: the document URL. Select the field of the desired document to preview from the drop-down menu.



Select the field of the desired document to preview from the drop-down menu.

Navigating URL Preview Results



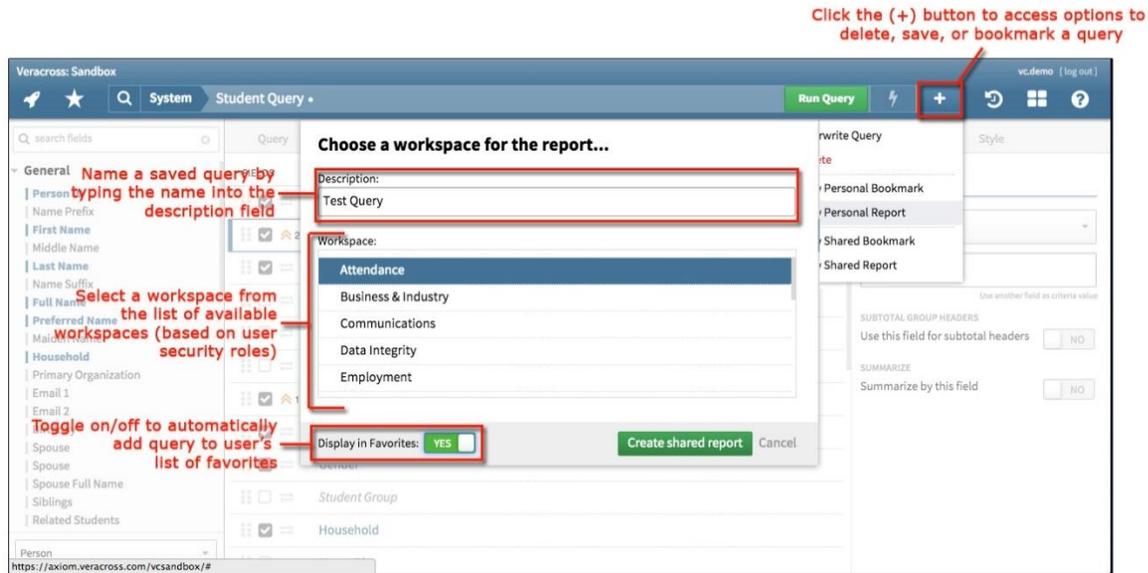
URL Preview results are separated into two sections: a list of results in a data grid on the left, and a preview window on the right. To preview the document associated with a record, click on that record in the list of the results.

If there is more than one document URL field included in the query, the user can easily switch to another document URL using the drop-down list at the top right corner of the query results.



QUERY RESULTS MANAGEMENT & ACTIONS

MANAGING QUERIES AND RESULTS



A modified query can be saved to allow the school to regularly access the query without the need to readjust the fields, criteria, and other settings each time. Queries get saved or bookmarked into personal or shared Workspaces.

Visit the documentation on workspaces for more details on how [saved and bookmarked queries are organized](#).

Saving a Query

Once a query has been modified it is possible to save the query for future use by using the options to create a New Personal Report or New Shared Report. Creating a new report allows the user to choose a name for the saved query, choose the Workspace the query should be saved into, and also decide whether that newly saved query should be displayed in his/her Favorites.

To save a query, click on the plus (+) button to the right of the "run query" button at the top of the screen and select "new personal report" or "new shared report." In the window that appears, enter the query name into the "description" box, select the appropriate Workspace from the list of workspaces that the user has access to, toggle the "display in favorites" option as needed, and then click the green "create personal/shared report" button at the bottom.

Deleting a Query

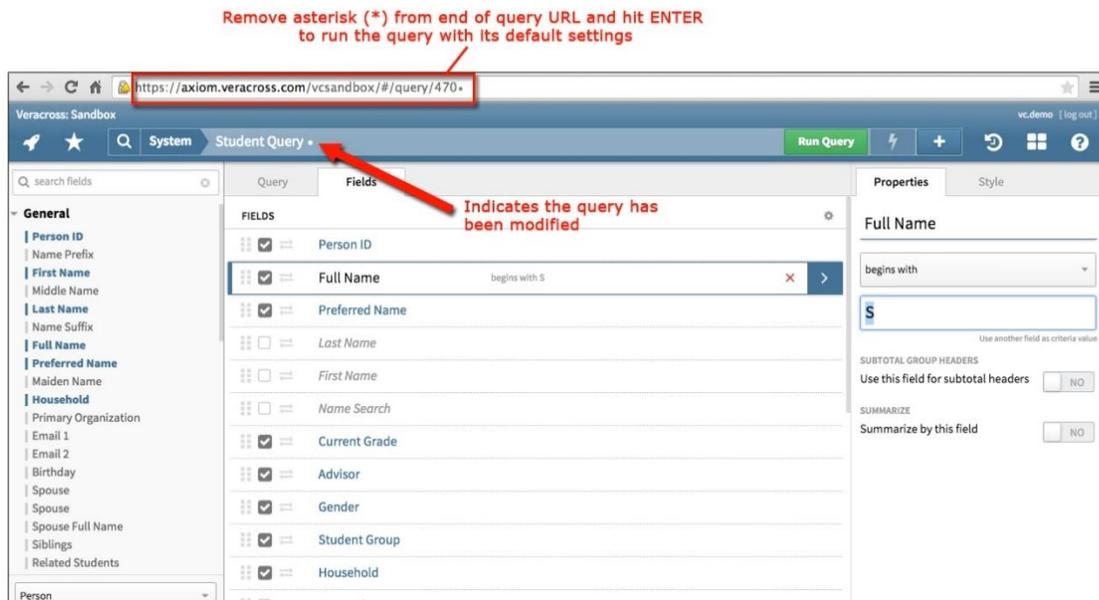
To remove a saved query, open the query and click the plus sign at the top right of the



screen (to the right of the green “Run Query” button). Select “delete” from the drop-down menu. Once a saved query has been deleted it cannot be recovered.

If a query has been bookmarked by a specific user and the owner of the query deletes the query, all of the bookmarks pointing to that query will also be deleted. When a query has been saved it then becomes an individual query, so if a query has been saved in multiple places each instance of the query must be deleted individually.

Resetting a Modified Query



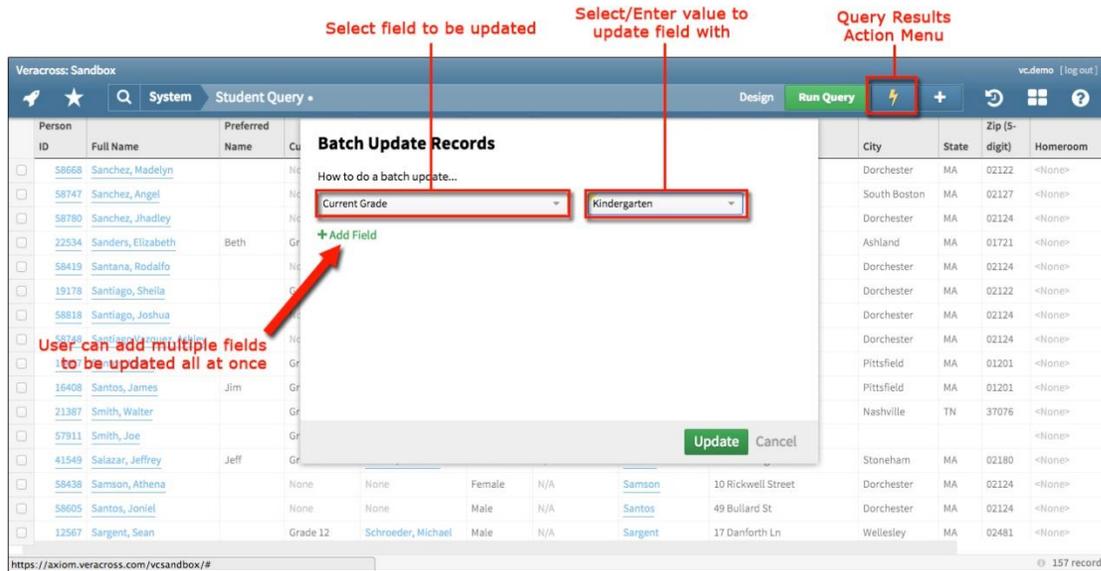
Anytime changes have been made to a query on the query design page, an asterisk (*) appears at the end of the page URL. To reset a query back to its default settings, which will remove any formatting and criteria, simply delete the asterisk from the end of the URL and hit the ENTER key to run the URL again.

QUERY RESULTS ACTIONS

Once the user has modified a query to produce the desired results, there are several actions that he/she can take with the results. Query actions can be selected from a drop-down menu by clicking the lightning bolt icon at the top right of the screen (to the right of the green “Run Query” button).

Batch Updating Records

This action is used to quickly update one or more fields across multiple records. To apply this action to records in a query, select the “batch update records” option from the action drop-down menu.



In the window that appears, select the field to be updated, and then select the new value to be applied to that field. Click the “+ Add Field” link to add additional fields to be updated. Click the green “Update” button at the bottom of the window to run the procedure.

Please Note: Only real fields can be batch updated in this manner. For more information on real and calculated fields, please visit the documentation on [Queries & Results Overview](#).

Exporting Data to CSV

Query results displayed in a data grid can be exported as a Comma Separated Values (CSV) file. The most common program for CSV files is Microsoft Excel. To export query results to an Excel spreadsheet, select the “Export to Excel” option from the action drop-down menu. In the window that appears, click the green “Export” button at the bottom to run the procedure and the file will automatically download to the computer.

Exported files maintain the same field properties and formatting as the query results, so renamed fields, column order, background colors, etc. will be included on the exported spreadsheet.

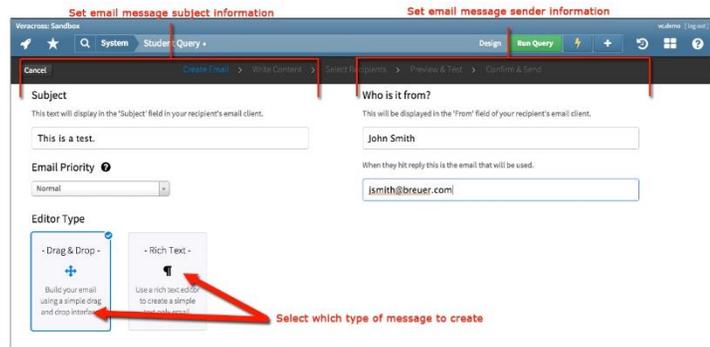
Composing Emails for Selected Recipients

The user can compose an email message based on query results.

For example: if the user ran a “Find Students” query to generate a list of all students in 9th grade, he/she could then create an email message to those students based on the results list.

To compose an email from results, there must be an email field in the query. The user

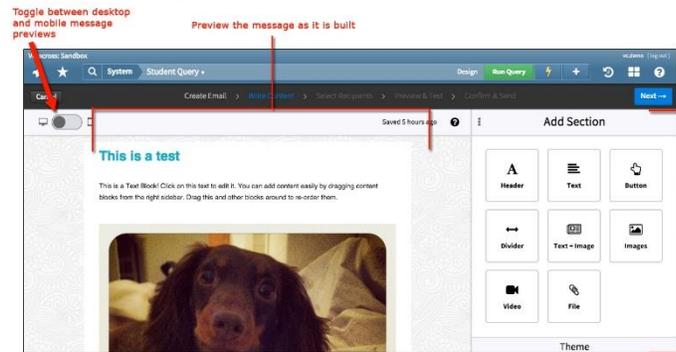
must first click the query results action button (lightning bolt) and choose the "compose email for selected recipients" option, then select the desired email field from the drop-down menu and then click the green "launch composer" button.



The email message composer

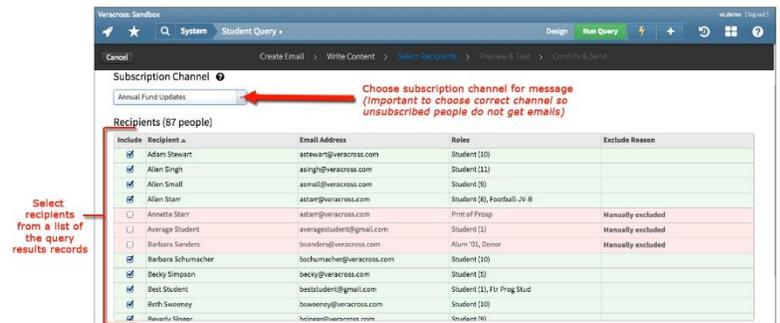
allows the user to choose between building a complex email message (which can include images, files, videos, etc.) or a rich text message (which consists only of

text). Within the composer user can set the details of the email (subject line, sender name, etc.), create the content of the email, select the email recipients from the list of results records, preview and test his/her message, and send the message.



Printing Results Grid

Printing the results of a query in Axiom should be done by first exporting the data to Excel (see the section above on exporting), and then printing from there.





RECORD MANAGEMENT

RECORD MANAGEMENT OVERVIEW

In order to track many discrete pieces of information within the system, Veracross organizes information into unique records. These records allow schools to easily access and manage both current and historical information.

Some examples of records within Veracross are:

- Person Record
- Household Record
- Organization Record
- Application Record
- Person Enrollment Record
- Course Record

Each of these records contains a set of fields that store various pieces of information.

For example: a person record will include fields for name, phone number, ethnicity, citizenship, marital status, job title, etc. whereas a class record will include fields for class name, teacher, begin and end dates, classroom, and much more.

Records within Veracross can also relate to one another.

For example: a student record can be linked to his/her parent's record to show that there is a relationship between the parent and child.

Similarly, people can be linked to a particular event to track the person's attendance. This relational data structure facilitates easy communication, faster data access, and better data management.

This section of the Axiom manual provides details for managing records within Veracross. The Detail Screens section contains instructions on how to add, delete, and update records. Related Records describes the process for managing the relationships between records, and the Record Actions section is a guide for learning the many actions that are possible from detail screens.

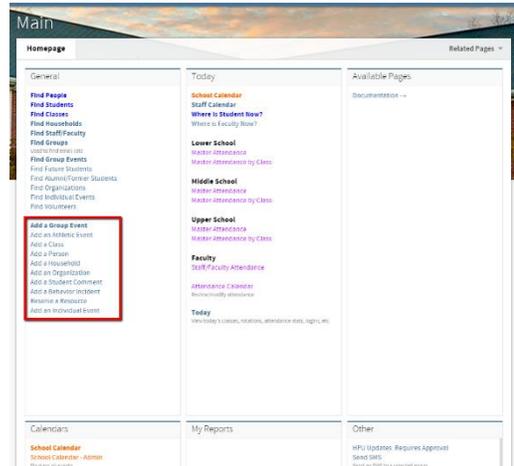


DETAIL SCREENS

Managing records within Veracross is one of the most fundamental Axiom tasks. This article will explain how to use Axiom for record management, such as adding, deleting, and updating records.

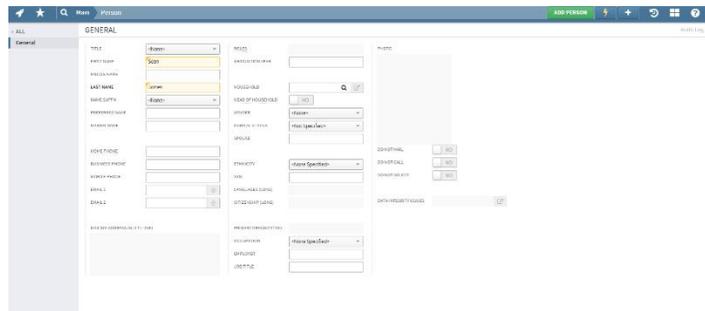
ADDING A RECORD

The process for adding a record can begin on most homepages. Depending on which homepage is the starting point, the Add links available will vary.



For example: on the Admissions homepage, a user can "Add a Candidate," "Add an Application," or "Add a Visit," whereas the Athletics Homepage gives a user the ability to "Add a Team," "Add an Athletic Event," or "Add a Behavior Incident."

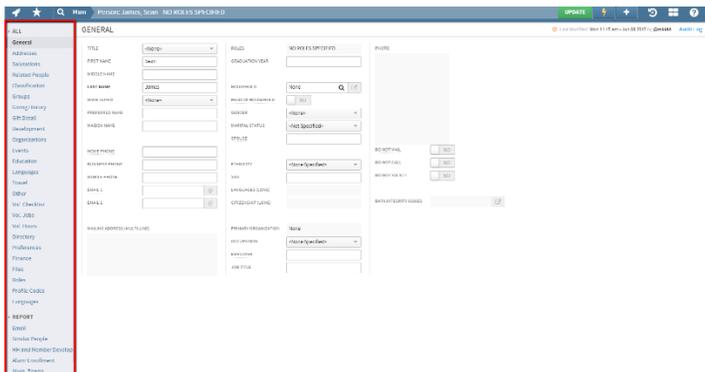
When an Add action is selected, the user will be brought to a window that allows data entry. The fields available for entry depend upon the type of record to be added.



For example: a person record will have fields for first name, last name, email, phone number, etc. A class record will have fields for teacher, room, start and end date, school year, etc.

When adding a new record, certain fields are required. If a field is required, the name of the field will be in bold font.

As information is entered, fields with added data will be highlighted orange and an orange triangle will appear within the field's upper left corner to show that information has been inserted.



When all relevant data has been added on the General tab, the user

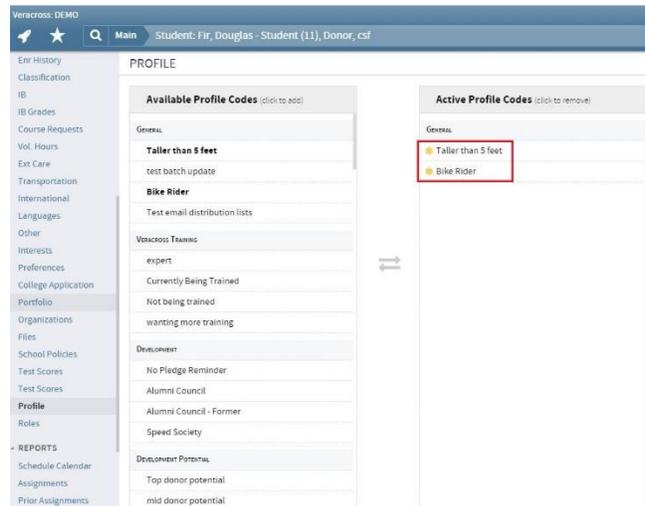
will click the green "Add" button located in the top right hand corner of the page. Clicking this button serves to both insert the record into the system and add the information entered into the various fields. Once the record has been saved, additional tabs will become available on the left hand side of the record that allow for further data entry.

Once a record has been added, a number of fields may be prepopulated with data. These fields will not allow manual data entry and will display with a gray background. Some of these gray fields are calculated values that are populated once the record is added, while others may pull data from a related record.

MULTI-SELECT TABS

Multi-select tabs give users the option to tag a single record with more than one value of a particular type.

For example: the Profile tab available on the person detail screen allows multi-select, giving the user the ability to indicate that multiple profile codes apply to the person. Another multi-select tab is available on the Qualitative tab on a course record. This tab allows the user to select any rubric criteria that apply to classes within the course.

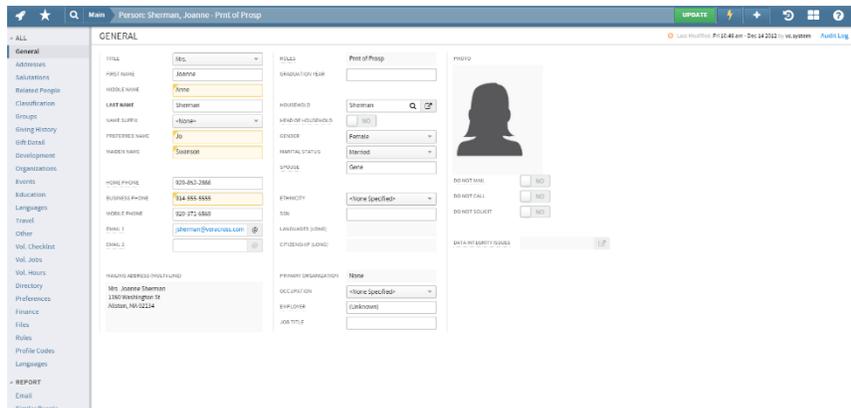


To use a multi-select tab, users should click on any of the options available in the left hand side of the screen. Doing so will add that option to the right hand side of the screen, which contains a set of Active options associated with this record. Any newly added, unsaved options will display a yellow star next to the description.

UPDATING RECORDS

The process for updating a record in Axiom is the same on every type of record.

When updating any field on a record, the updated information will be highlighted in orange. In addition, an orange





triangle will appear within the field to indicate that information has been entered, changed, or removed.

Once the data on the record has been changed, click the green Update button in the upper right hand corner to save the changes. The record must be updated prior to navigating to a different tab.

A status bar will appear as the information is being saved. If the update was successful, a green check will appear in the center of the status bar.

DELETING RECORDS

To remove a record, navigate to the record's detail screen and use the Delete option found in the Actions menu in the Launchpad. Since deleting a record is a permanent change, a message asking for confirmation will appear before the user is able to delete the record.



While the action to remove a record is simple, related records tied to the master record may prevent immediate removal. If this scenario occurs, the related records must first be removed from the master record before the master record can be deleted.

For example: If a user needed to delete a class record used as a test, the user would first need to remove the students from that class before the class itself could be removed from the system. Once the student class enrollment records have been removed, the class is eligible for removal.

Records can often be easily removed, however, many records are tied to other records within the system, and therefore, the link to these records must first be removed in order to delete a record.

For example: a record for a student is likely tied to their parent records. The link in this case is the relationship that has been established between these two records. The relationship between the student and parents would first have to be removed in order to delete the student record.

Note: If the record is related to another record in the system, an error message will display in a red bar at the top of the record and will indicate why the record cannot be removed.

AUDIT LOG

Veracross keeps audit log records of all changes made to data in the system. A link to these audit log



records is present on most detail screens in the upper right hand corner. The audit log records provide a full history of changes to an individual record, including date and time a field was updated, the old value, the new value, and the username of the person who made the change.

The screenshot shows a web application interface for a person record. The top navigation bar includes a search icon, a star icon, and the text "Main Person: James, Sean - NO ROLES SPECIFIED". On the right side of the navigation bar are buttons for "UPDATE", a lightning bolt icon, a plus icon, a refresh icon, a window icon, and a help icon. Below the navigation bar is a sidebar menu with various categories like "General", "Addresses", "Salutations", etc. The main content area displays an "AUDIT LOG" table. The table has columns for "Update Date", "Field Updated", "Old Value", "New Value", "Update User", and "Update Machine". Three rows of data are visible, with the first two rows highlighted by a red box. The first row shows an update to "phone_mobile" on 06/08/15 at 16:47:05, with the new value "978-988-1234". The second row shows an update to "phone_home" on the same date and time, with the new value "555-555-5555". The third row shows a person being inserted on 06/08/15 at 16:45:12. The table also includes a "Last Modified" timestamp and a link to "Audit Log".

Update Date	Field Updated	Old Value	New Value	Update User	Update Machine
06/08/15 16:47:05	phone_mobile		978-988-1234	@mkidd	axiom2.dfw
06/08/15 16:47:05	phone_home		555-555-5555	@mkidd	axiom2.dfw
06/08/15 16:45:12	** Person Inserted **			@mkidd	axiom2.dfw

Update Date & Update User

Users will also be able to view the last date and time that a record was modified, along with the update user, without needing to click into the audit log itself. This information is provided at the top right of all tabs on a detail screen to provide easy accessibility.





RELATED RECORDS

OVERVIEW

Records can be linked to other records within the system. For example, users can indicate relationships by linking person records on the Related People tab of a person record. Users can also link student records to class records to indicate which students are enrolled in a particular class.

Other examples of related records:

- Person records to a household record
- Class enrollment records linked to class records
- Attendance records linked to class records and student records
- Application records linked to an admissions candidate record
- Group records tied to group event records
- Donation records link to pledge records (if the donation should be applied to the pledge)

On a record, if a link to another record can be made, there will be an "Add Record" button to input the related record. In Axiom, the name of the grid that displays and makes management possible is called the "Input Grid."

MANAGING RELATED RECORDS

Adding New Related Records

Related Person	Relationship	Roles	Resident	Legal Custodi	Portal Access	Pick Emerg Up	Gener Correl	Repor Cards	Medic Autho	Custody Deper	Status	Updat Permi	Notes
Cobb, Michelle	Wife	Parent, Print of Applicant	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	<input type="checkbox"/>	+ -
Cobb, Andrew	Son	Applicant, Sibling	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Normal	<input type="checkbox"/>	+ -					
Cobb, Dennis	Son	Student (PK)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Normal	<input type="checkbox"/>	+ -					

If the "Add Record" button is available within an existing record, it is possible for that record to be tied to other records within the system.

For example: on the Related People tab, an "Add Record" button is present. When this button is selected, a new row will appear in the input grid. The user will be able to choose the related record by clicking on the icon. Once a related person is selected from the resulting search grid, a relationship record is created, and the row on the initial person's record will populate with the related person's



information. The user will then be able to use the additional fields on the input grid to indicate the relationship between two people, as well as add any permissions the related person might have for the initial person.

Another example of a related record appears on the General tab of a class record. Just like when adding a related person to a person record, the "Add Record" button will introduce an extra row to the input grid. The user will be able to choose a student record to tie to this class record by either typing the students name or by clicking on the magnifying glass icon. Adding the student to the class creates a class enrollment record, and users are then able to use the input grid on the General tab to insert more information, such as Late Date Enrolled.

Editing Related Records

Related Person	Relationship	Roles	Resident	Legal	Portal	Pick	Gener	Repor	Medic	Custody	Updat			
				Custoi	Acces	Emerg	Up	Corre	Cards	Autho	Deper	Status	Permi	Notes
Cobb, Michelle	Wife	Parent, Print of Applicant	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	<input type="checkbox"/>	
Cobb, Andrew	Son	Applicant, Sibling	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Normal	<input checked="" type="checkbox"/>							
Cobb, Dennis	Son	Student (PK)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Normal	<input checked="" type="checkbox"/>							
Cobb, Colleen	Godmother		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	<input type="checkbox"/>	

To edit the related record, users can navigate to the input grid on a record. The location of the input grid may vary depending upon the record.

For example: on a person record, related records can be found on the Related People tab. On a class record, related records can be found on the General tab.

Once the input grid is located, the user can change the information within the grid and then use the "Update Record" button to save.

For example: a user might need to make a student's grandparent an emergency contact by changing the permission flags on the student's Related People tab. The user would check the "EM" checkbox for the grandparent and update the record. Similarly, a user might need to withdraw a student from a class. To do so, the user would navigate to the input grid on the General tab of the class, add a date to the Date Withdrawn field for the student enrolled in the class, and update the record.

In both the case of changing the emergency contact information or withdrawing a student from a class, the changes are made within the input grid, and then the master record is updated to save the changes.



View Related Record Detail

To view the related record's detail screen, the user can navigate to the input grid on the master record. The user can then click on the  icon located in the second to last column of the input grid. By clicking the arrow icon, the system will open the record within the same window.

Deleting Related Records

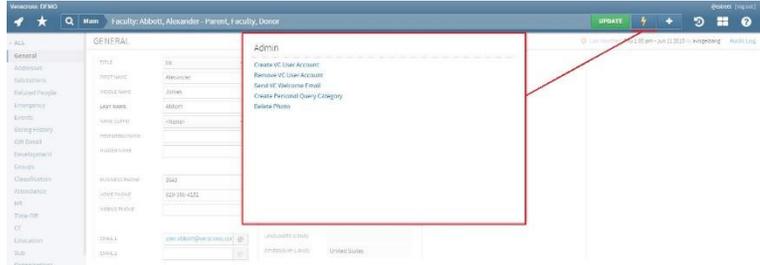
To delete the related record, the user can again navigate to the input grid on the master record. From the input grid, the user can click the red **X** located in the last column of each row. When the red **X** is selected the record will be highlighted in red. Once the row is highlighted, clicking the Update button at the top of the screen will remove the related record.



RECORD ACTIONS

OVERVIEW

Each record in the system is associated with a set of Action items, accessed via the ⚡ icon in the Launchpad. The Actions available in the dropdown are dependent upon the type of record or query on which Actions must be performed. The following presents a list of examples of commonly used Actions.



PERSON RECORD ACTIONS

Admin:

- **Create User Account:** creates a username and password for an individual.
- **Remove User Account:** removes a username and password for an individual.
- **Send Welcome Email:** sends a Welcome email to an individual once a user account has been created.

HOUSEHOLD RECORD ACTIONS

Admin:

- **Add Member:** allows users to add a new person with any role to a household.
- **Add Prospect:** allows users to add a new person with the prospect role to a household record.

QUERY ACTIONS

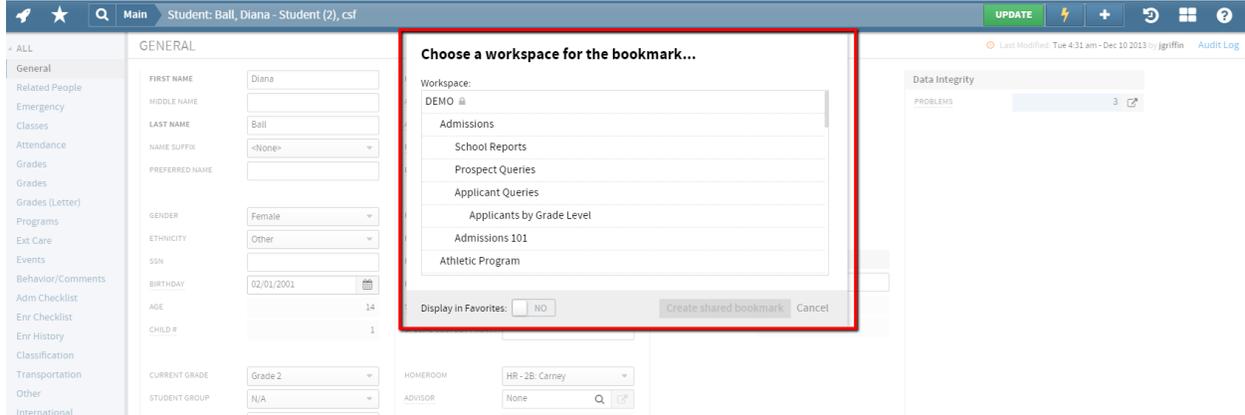
Actions:

- **Batch Update Records:** allows a user to update or change fields for all records within a set of query results. When the Action is selected, an interface opens and will guide the user through the steps to change the data for all constituents in a query. This interface does allow multiple fields to be updated with a single batch update.
- **Export to Excel:** creates an Excel file of query results, maintaining the same column headers and data.
- **Compose Email for Selected Recipients:** allows a user to create an email with the Veracross Composer tool. In order for this functionality to be successful, the Email 1 field must be included in the query results. When the "Compose Email for Selected Recipients" Action is chosen, an interface will appear to guide the user through the process.



- **Print Document for Records:** allows a user to batch print a specific PDF document (i.e. enrollment contract, grade detail report, student schedule, etc.) for a selected group of individuals.

BOOKMARKING RECORDS



Within a record, users can create a both personal and/or shared bookmarks by clicking the Organize tab in the Launchpad (found via the plus icon). This functionality is particularly useful if the record is accessed frequently, and users prefers to avoid querying for it every time it needs to be located.

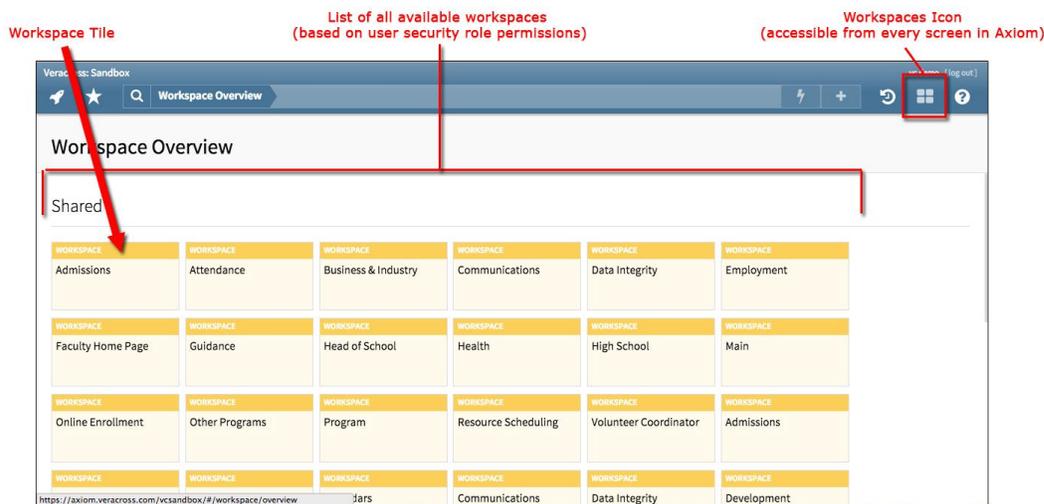
- **New Personal Bookmark:** This option allows users to save a link for an individual record to a *personal* Workspace so that the record can be easily accessed at any time.
- **New Shared Bookmark:** This option allows a user to save a link to an individual record to a *shared* Workspace so that the record can be easily located by any user who has access to the Workspace.

WORKSPACES

WORKSPACES OVERVIEW

A new organizational system called Workspaces has been introduced with the release of Axiom. The Workspaces structure is similar in concept to that of the folder system in the previous platform, ES2, and allows users to save or bookmark queries and records for easy retrieval. Visit the documentation that covers utilizing workspaces for more information on managing bookmarks and records.

Workspaces can be accessed from any screen in Axiom by clicking on the Workspaces icon (four squares) at the top-right corner of the screen. On the page that appears, the user will see each of the workspaces that he or she has access to listed as tiles.



PERSONAL VS. SHARED WORKSPACES

There are two types of workspaces, personal workspaces and shared workspaces.

A personal workspace is a workspace unique to an individual user. Personal workspaces can be customized and organized according to a user's preferences. Aside from system administrators, only the individual user has access to his or her personal workspace.

A shared workspace is a workspace that can be accessed by multiple users. Each homepage in Axiom has its own shared workspace. Users are only granted access to the shared workspaces associated with the homepages for which they have security role permissions.

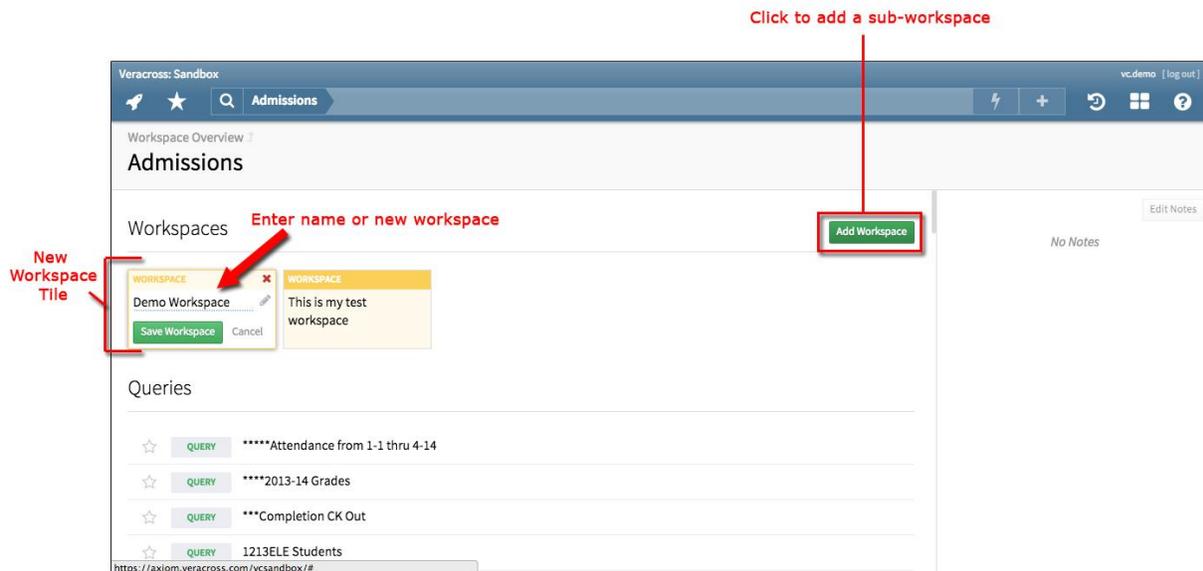


WORKSPACE ORGANIZATION

Within a workspace, the user has the ability to further organize content by adding sub-workspaces. A user can add as many levels of workspaces as he or she wants. Sub-workspaces can be added to both personal and shared workspaces as long as the user has access to them.

All workspaces are separated into three main sections: Workspaces, where any sub-workspaces are displayed as tiles; Queries, where any saved or bookmarked queries are listed; and Records, where any bookmarked records are listed. Each workspace also contains a section where the user can add notes as needed.

CREATING A WORKSPACE

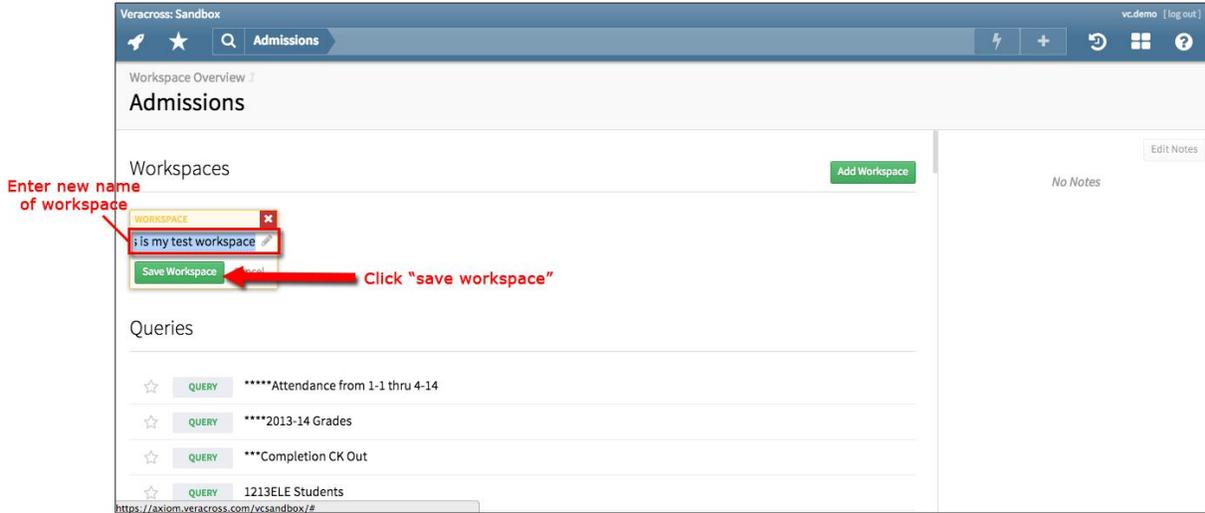


Primary workspaces, such as a user's personal workspace, can only be created by a Veracross system administrator. If a user does not already have a personal workspace, he or she should contact his or her Veracross Administrator.

Sub-workspaces can be created by any user with access to that primary workspace. To create a sub-workspace, the user should first open the appropriate primary workspace and then click the green "Add Workspace" button at the top-right of the screen. A yellow tile will appear. Enter the name of the sub-workspace, and then click the green "Save Workspace" button.

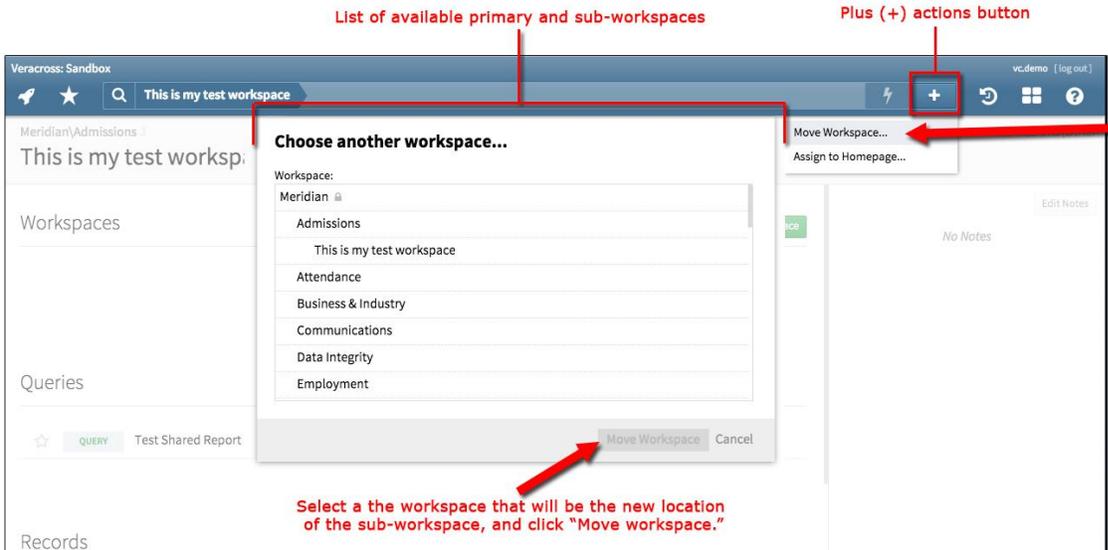


RENAMING A WORKSPACE



After a sub-workspace has been added, the user can rename it at any time. To rename a sub-workspace, the user should first navigate to that sub-workspace tile. When the mouse cursor is placed over the yellow tile, an “edit” button will appear at the bottom right. Click on the “Edit” button, type in the new workspace name, and then click the green “save workspace” button.

MOVING A WORKSPACE



Sub-workspaces can be easily moved to other workspaces at any time. To move a sub-workspace, the user must first open the sub-workspace that he or she wants to move. After the sub-workspace is open, click on the plus (+) button at the top right of the

screen and select “Move Workspace.” In the window that appears, the user will see a list of each of the primary and sub-workspaces that he or she has access to. Select the primary or sub-workspace that will become the new location, and then click the green “Move Workspace” button.

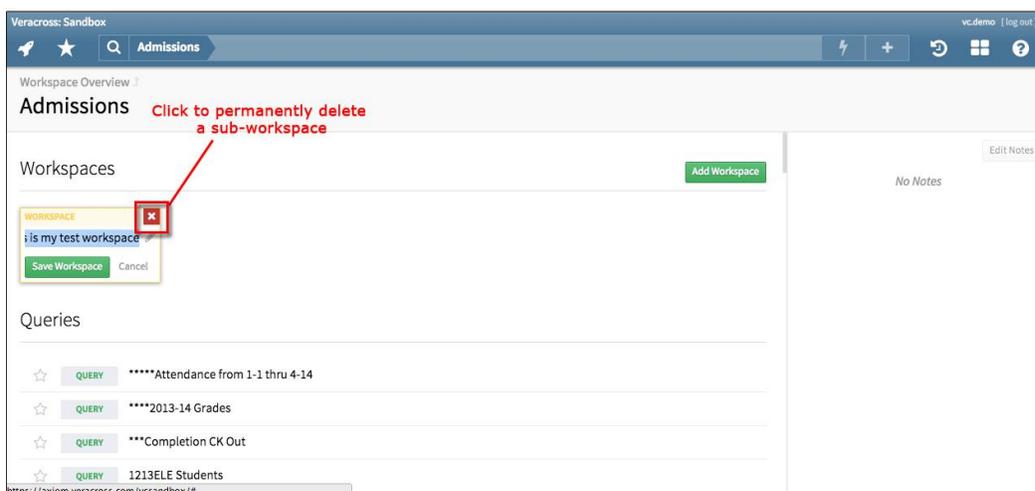
Please Note: In the list of primary and sub-workspaces, a workspace may have a picture of a lock next to it. This indicates that it is a “top level” workspace that cannot be accessed and, therefore, cannot have sub-workspaces added to it.

ASSIGNING A WORKSPACE TO A HOMEPAGE

By default, a link to the appropriate shared primary workspace is located on each homepage. Although all available workspaces are listed as tiles on the workspaces page, there may be times when a user wants a particular workspace to appear on a homepage as well for more convenient access.

To assign a sub-workspace to a homepage, the user must first open the sub-workspace and then click on the plus (+) button at the top-right of the screen and select “Assign to Homepage.” In the window that appears, the user will see a list of each of the homepages that he or she has access to, with the various sections of that homepage nested below. Select the homepage section where the sub-workspace should appear, and then click the green “Assign Workspace” button.

DELETING A WORKSPACE





A user can delete any sub-workspace that he or she has access to, regardless of who originally created it. Primary workspaces, on the other hand, can only be deleted by Veracross system administrators.

To remove a sub-workspace, the user must first navigate to that sub-workspace tile.

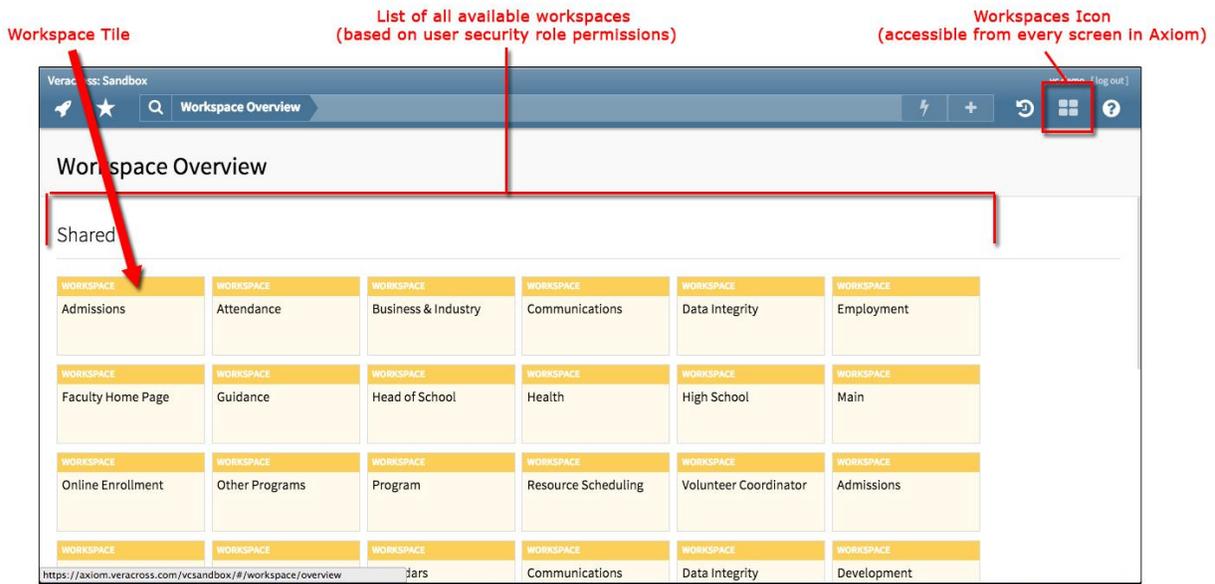
When the mouse cursor is placed over the yellow tile, an “edit” button will appear at the bottom right. Click on the edit button, and then click on the red "X" in the top-right corner of the tile.

It is important to note that deleting a sub-workspace will automatically delete any sub-workspaces, queries, and reports contained within that workspace!



UTILIZING WORKSPACES

A new organizational system called Workspaces has been introduced with the release of Axiom. Workspaces are an organizational system for users in Axiom. They are the equivalent of the folder system in the previous platform, ES2. Users can utilize workspaces to organize queries and records in one convenient location for easy retrieval.



Queries and records can be added to personal or shared workspaces either as a bookmarks or reports.

BOOKMARKS

A bookmark references another query or record in the system. Rather than existing as an individual copy of a query or record, a bookmark is linked to the original and will update automatically as the owner makes changes. Similarly, since a bookmark is only a reference to another query or record, if the owner deletes that query or record, the bookmark will also automatically be deleted.

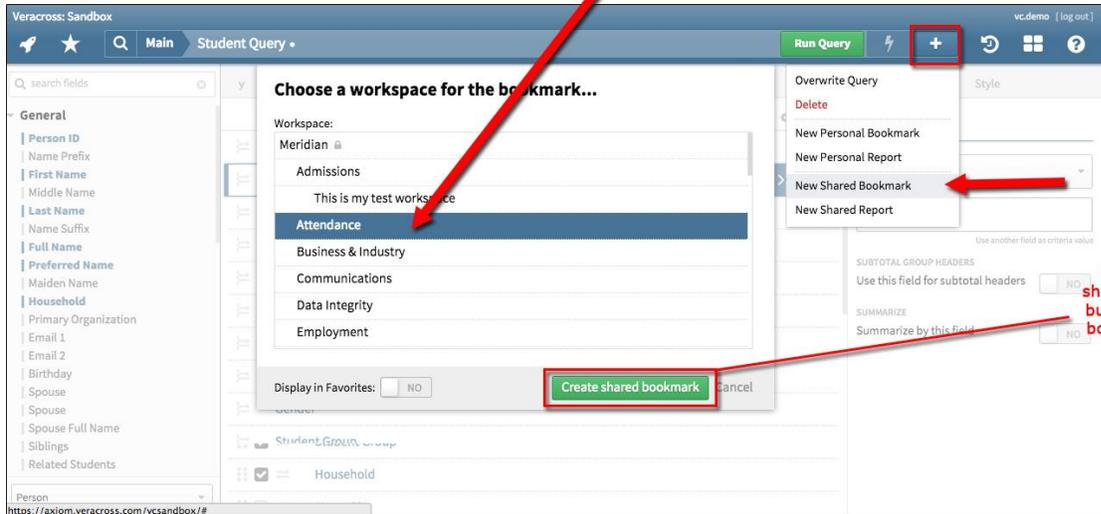
Bookmarking a System Report

A user can bookmark a system report in just a few short steps. Bookmarking queries is particularly useful within departments, as it allows the owner to push out changes to the report to multiple users automatically, rather than requiring that the change be made on each individual copy of the query.

To bookmark a query report, open the query and click on the plus (+) button at the top right. Select either "New Personal Bookmark" or "New Shared Bookmark." In the



Select the workspace location for the new bookmark

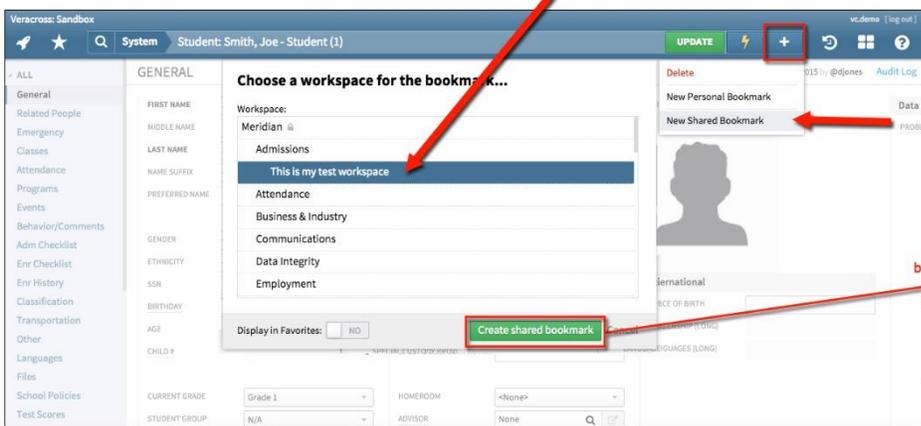


Click "create shared bookmark" button to add the bookmark to the workspace

When the dialog box appears, the user will see a list of each of the primary and sub-workspaces that he or she has access to. Select the primary or sub-workspace location for the new bookmark, and then click the green "Create Personal/Shared Bookmark" button.

Bookmarking a Record

Select the Workspace location for the new bookmark



Click "create bookmark" button to add the bookmark to the workspace

Users also have the option to bookmark records within the system (e.g., a student record). Bookmarking a record is particularly useful as a way to call attention to records that require some sort of action or that need to be reviewed.

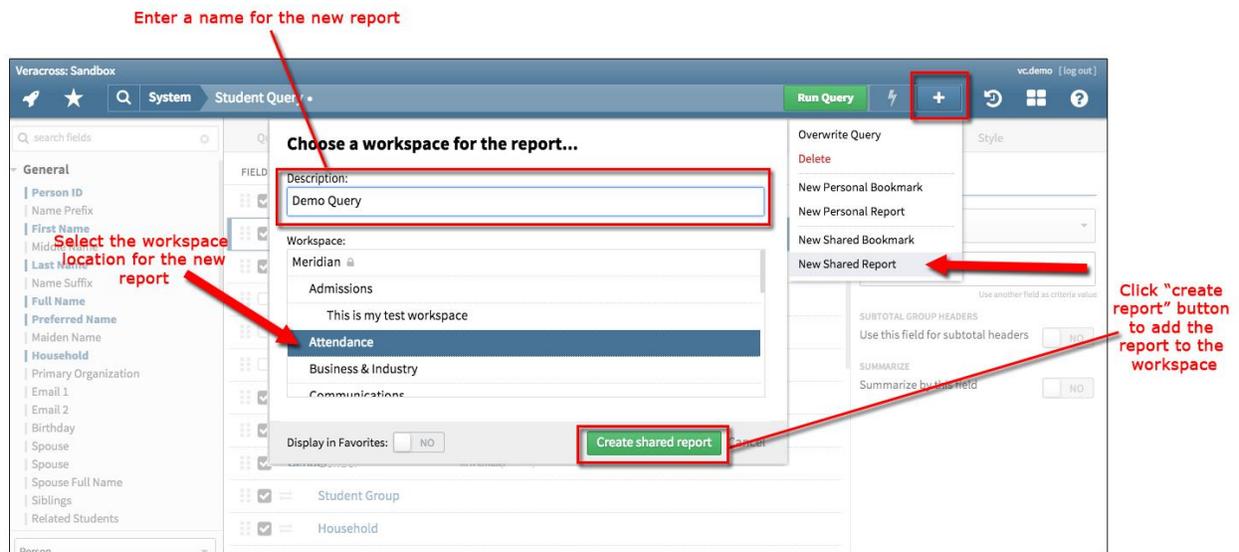
To bookmark a record, open the record and click on the plus (+) button at the top right. Select either "New Personal Bookmark" or "New Shared Bookmark." In the window that appears, the user will see a list of each of the primary and sub-workspaces that he or

she has access to. Select the primary or sub-workspace location for the new bookmark, and then click the green "Create Personal/Shared Bookmark" button.

REPORTS

A report is a saved query that maintains any criteria or settings present when the report is made. Unlike a bookmark, a report is an individual copy of a query; it does not link to or reference a query and therefore must be modified separately by the user. Deleting a report only removes the individual copy, not the original query from which the report was taken.

Saving a New Report



The screenshot shows the Veracross interface with a dialog box titled "Choose a workspace for the report...". The dialog has a "Description:" field containing "Demo Query". Below this is a list of workspaces: "Meridian", "Admissions", "Attendance" (highlighted), "Business & Industry", and "Communications". At the bottom of the dialog is a green "Create shared report" button. On the right side of the interface, there is a menu with options: "Overwrite Query", "Delete", "New Personal Bookmark", "New Personal Report", "New Shared Bookmark", and "New Shared Report".

Annotations in the image include:

- A red arrow pointing to the plus (+) button in the top right corner of the interface, with the text "Enter a name for the new report" above it.
- A red arrow pointing to the "Description:" field, with the text "Select the workspace location for the new report" next to it.
- A red arrow pointing to the "Attendance" workspace in the list, with the text "Select the workspace location for the new report" next to it.
- A red arrow pointing to the "Create shared report" button, with the text "Click 'create report' button to add the report to the workspace" next to it.

To add a query report to a workspace, the user must first open the query and then click on the plus (+) button at the top right. Select either "new personal report" or "new shared report." In the window that appears, the user can adjust the name of the report if needed. He or she will also see a list of each of the primary and sub-workspaces that he or she has access to. Select the primary or sub-workspace location for the report, and then click the green "create personal/shared report" button.



MANAGING BOOKMARKS AND RECORDS

After a bookmark or report has been added to a workspace, the user has the ability to copy or move it to a different workspace.

COPYING A REPORT TO ANOTHER WORKSPACE

To copy a report to another workspace, the user simply needs to save the query a second time to a new location. The user must first navigate to the query within the original workspace and open it, then click the plus (+) button and select either "New Personal Report" or "New Shared Report." In the window that appears, the user will see a list of each of the primary and sub-workspaces that he or she has access to. Select the primary or sub-workspace location for the copied report, and then click the green "Create Personal/Shared Report" button.

MOVING A REPORT TO ANOTHER WORKSPACE

To move a report or bookmark to another workspace, click the edit button in the upper-right hand section of the record or bookmarks section of the workspace. Then use the checkboxes next to each report or bookmark to indicate which reports or bookmarks should be moved. Click the "Move" button next to the edit button to start the move process for any checked reports or bookmarks. Use the window that opens after clicking "Move" to indicate which workspace the reports or bookmarks end up in.

REMOVING A REPORT OR BOOKMARK FROM A WORKSPACE

Users can easily remove a bookmark or report from a workspace. To remove a bookmark or report, navigate to the workspace it is in, place the cursor over the item to be deleted, and click red "X" to right of the bookmark or report name.

When a query or record that has been bookmarked by other users is deleted, any bookmarks that reference that query or record will also be deleted. Since reports exist as separate copies, removing a report deletes the individual copy of the query but not the original query itself.

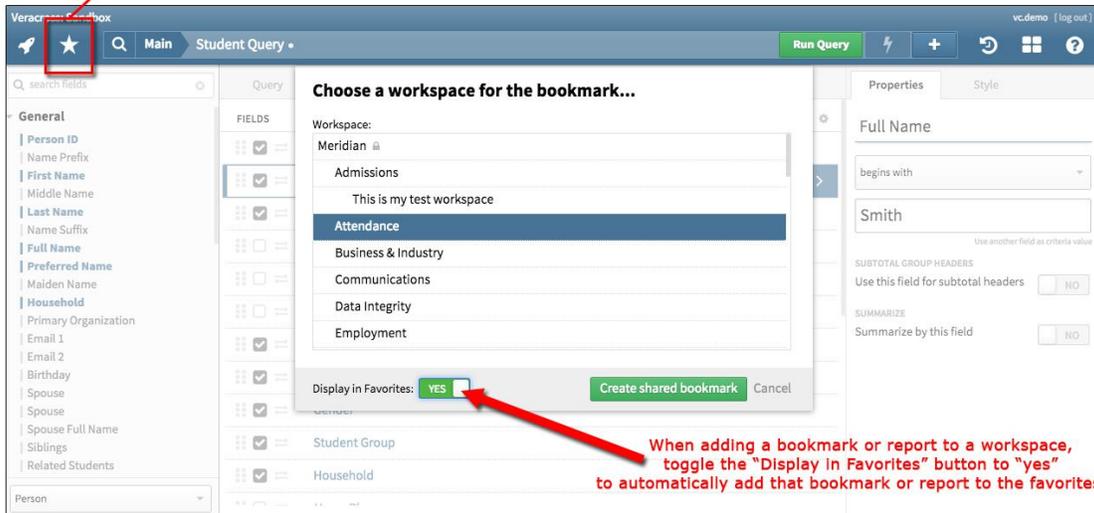
FAVORITES

Although workspaces allow the user to organize queries and records in one place, users also have the option to mark frequently used bookmarks and reports as "favorites" for even faster access.

A user's list of favorites can be accessed from any screen in Axiom by clicking on the star icon at the top-left corner of the screen. Any bookmarks or reports marked as favorites will appear in the list, separated into personal and shared sections depending on the workspace in which they are saved.

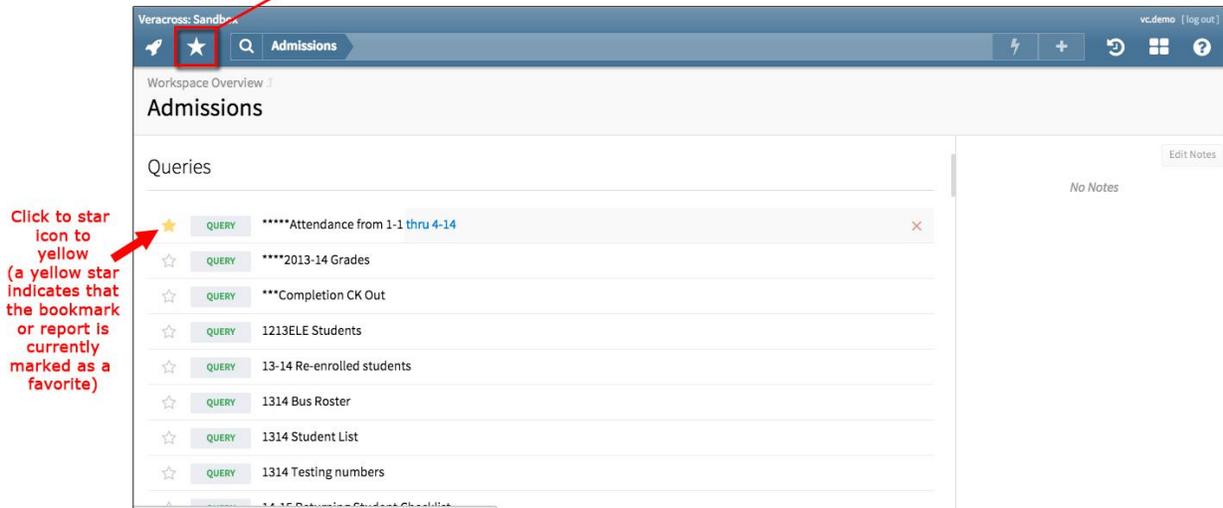


Click to view a list of any bookmarks or reports marked as "favorites"



There are two ways to mark queries and records as favorites. The first is to toggle the "Display in Favorites" option to "yes" when initially adding a bookmark or report to a workspace.

Click to view a list of any bookmarks or reports marked as "favorites"



The second option, which can be completed after a bookmark or report has already been added to a workspace, involves clicking on the star to the left of its name.