What is the Launchpad?

The blue navigation bar at the top of every Axiom page is called the Launchpad. This view allows for the easy manipulation of data within the results grid and offers access to individual records through links. The tabs on the Launchpad may vary depending on what homepage or record is being displayed.

Navigate
Click on the rocket icon to navigate to various homepages. Homepages are grouped together by category.

Organize
Click on the plus icon for options to overwrite or save queries to personal or shared Workspaces and to delete records.

History
Click on the clock to see most recent search history. This icon allows for easy navigation to previously-viewed detail screens and query results.

RESULTS	Student Query	10 minutes ago
RESULTS	Student Query	10 minutes ago
DETAIL	Student: Alston, Carolyn - Student (5)	10 minutes ago
RESULTS	Student Query	10 minutes ago

Veracross: DEMO @jgriffin [log out]

HOMEPAGES	General	Registration	Business	Daily Logistics	Academics	System/IT
	Main	Admissions	Development	Attendance	Lower School	Documents
	Calendars	Financial Aid	Employment	Boarding	Middle School	Data Integrity
	Resource Scheduling	Online Enrollment	Solicitor Portal	Athletic Program	Upper School	System
	Communication	Other Programs	Accounting	Extended Care	Guidance	System Tasks by Month
	Reporting	Parent/Teacher Conferences		Health	Scheduler Prep	IT Documentation
		Admissions NEW		Transportation	International Baccalaureate	
				Volunteer Coordinator		
				Lower School		

Overwrite Query
Delete
New Personal Bookmark
New Personal Report
New Shared Bookmark
New Shared Report

Help
Click here to access Axiom documentation online.

Veracross: DEMO @jgriffin [log out]

🚀 ⭐ 🔍 Main › Student Query ＊ | Design | **Run Query** ⚡ ➕ 🕐 ▦ ❓

Veracross: DEMO

🚀 ⭐ 🔍 search or type a command

PERSONAL	DEMO\Admissions\Prospect Queries	
SHARED	DETAIL	Admission Candidate: Armstrong, Beverly - Prosp
	DEMO\Employment	
	QUERY	Background Checks for Staff/Fac

Veracross: DEMO

🚀 ⭐ 🔍 schedule

☰	Room Schedule	*Middle School/Standard Reports*
☰	Room Schedule	*Upper School/Standard Reports*
☰	Class Schedule	*Lower School/Standard Reports*
☰	Class Schedule	*Middle School/Standard Reports*
☰	Class Schedule	*Upper School/Standard Reports*
➔	Schedule Builder ➔	*Documents/Schedules - Fall, Documents/Sch*

Actions
Batch Update Records
Export to Excel
Compose Email for Selected Recipients
Print Document for Records

Favorites
Click on the star to view queries and records that have been saved to Favorites.

Search
Click in the Search bar to quickly look up individual records or queries. Note that the Search tool is also available in the expanded navigation bar.

Actions
Click on the lightning bolt to run procedures. Depending on what homepage, query, or detail screen is displayed on the page, different procedures will be available to run.

Workspaces
Click on this icon to view Workspaces. Workspaces are folders - either shared or personal - in which queries and records can be saved.

Homepages

Axiom homepages are designed to allow for quick navigation. Queries that are used for similar purposes are organized together on the same query card. Each query card has a title that specifies the function or purpose for those particular queries.

Record Tiles
Certain homepages will have tiles that display record counts. These tiles allow users to quickly see query results without having to run the query itself. Click on the tile to view the underlying query.

Cards
Similar queries are grouped together by function or topic on a card to streamline workflow and allow for easier navigation.

Workspaces
Easily access a Work-space that has been saved to a homepage.

Calendar Tile
For quick navigation to department-specific events, click on the Calendar tile.

Add Button
Use one of several add buttons to insert a new record.

Embedded Query
Results from a query are displayed directly onto the page in a grid format.

Sorting
Sorting is possible within embedded queries. To sort, simply click on the column header that should be ordered.

Pop Out Icon
Use this icon to expand an embedded query into its own window. Expanding the query allows you to change the query design for more cus-tomized results.

Important Queries
Certain queries are more frequently used than others. Use the query buttons to access these important reports.

Admissions NEW

Homepage

New Inquiries	New Applications
82	39

New Visits	Dashboard
0	

Recent Admission Activity

Record Date	Full Name	Record Type	Record Description	URL
04/15/15	Tracy, Sophie	Admissio...	Application Fee	#/detail/347/358
10/22/14	Tracy, Sophie	Applicati...		#/detail/69/3125
09/29/14	Castro, Jeffrey	Audit Log	online_enrollment_stat...	#/detail/14/9682
09/29/14	Castro, Jeffrey	Audit Log	enrollment_decision = 2	#/detail/14/9682
09/24/14	Abbott, Julie	Audit Log	application_status = 2	#/detail/14/9680

Candidates
🔍 Find Candidates
➕ Add a Correspondence

Candidates by Counselor
Candidates by Pool
Candidates by Source
Candidates by Interest
Candidates by Feeder School
Inactive Candidates

Find Inquiries

Admissions Integrity Issues

Active Year Overview
School Reports

by Grade
Enrollment Summary
Re-Enrollment Summary

Admissions Statistics by Month
Admissions Summary by Year

Admissions Calendar 📅

My Admissions
👤 My Candidates

My Candidate Activity
My Candidate Correspondance
My Incomplete Checklist Items

My Visits

My Applications for Review

Communication
Find Groups
Used to find email lists
Admissions Reports

Visits & Tours
🔍 Find Visits   ➕ Add a Visit
📅 Visit Calendar

Today's Visits
Visits that Need Follow Up
Tour Guides

Checklists
🔍 Find Admissions Checklist Items

Recently Completed Checklist Items
Incomplete Application Checklists
Overdue Application Checklists
Scheduled Checklist Items

Applications
🔍 Find Applications   ➕ Add an Application

Pending Review
In-Process - Incomplete
In-Process - Complete

Web Form Completion Summaries
Form session completion summaries for the new web forms.

Interviews
🔍 Find Interviews

Candidates without Interviews

Interviewers

Group Events
Find Group Events
Add a Group Event

Find Group Event Attendance

Detail Screens

Detail screens allow users to quickly view information about a particular constituent, event, class, resource, and much more. Updating data or navigating to a related record is made simple and intuitive with the tools provided on the detail screen.

Record Identification
Within the Launchpad is a bar that displays high-level information about the record. On a person record, this bar shows the person's name and role.

Action
Click on the lightning icon to perform an action or run a procedure for this record.

Organize
The plus icon allows you to save this record to either a personal or shared Workspace.

More Information
Can't find specific information on the General tab? Use the full list of other tabs to the left of the Detail Screen to find specific information about your constituent.

Last Modification
Check to see the most recent change to this record at a glance.

Update
Click the update button to save any changes that have been made to this record. If you try to navigate away from the page without updating first, a reminder message will pop up asking if you'd like to save the updated record.

Audit Log
To see audit log changes for this record, click the Audit Log link.

Veracross: DEMO — @jgriffin [log out]
Main — Admission Candidate: Boyd, Amelia - Prosp — UPDATE

GENERAL — Last Modified: Wed 10:19 am - Jun 10 2015 by @jgriffin — Audit Log

ALL
General
Notes
Checklist
Interview
Activity Log
Portals
Financial Aid
Enr Checklist
Events
Related People
Emergency
Schools
Interests
Education
Test Scores
Test Scores
Programs
Classification
Other
Files
Review
Profile
Roles

REPORTS
Groups
Email
Admission History
Enrollment History

PERSONAL PROFILE
FIRST NAME — Amelia
MIDDLE NAME
LAST NAME — Boyd
NAME SUFFIX — <None>
PREFERRED NAME
GENDER — Female
ETHNICITY — <None Specified>
BIRTHDAY — 09/27/2005
AGE — 9
CURRENT SCHOOL — None
EMAIL 1 — @
MOBILE PHONE
HOUSEHOLD — Boyd
MULTIPLE HOUSEHOLDS
PARENT 1 — Allen
PARENT 2 — Christine
CITY, STATE, POSTAL — Wakefield, MA 01880
COUNTRY — United States
PHONE — 929-858-6693

ADMISSIONS PROFILE
YEAR APPLYING FOR — 09-10
GRADE APPLYING FOR — Grade 9
RESIDENT STATUS APPLY... — N/A
STUD. GROUP APPLYING ... — N/A
CAMPUS APPLYING FOR — None
CURRENT GRADE — Grade 8
APPLIED PREVIOUSLY
OF SIBLINGS ENROLLED
OF SIBLINGS APPLYING
LEGACY STATUS
STAFF FAMILY
INTERESTS
CANDIDATE POOL — N/A

Financial Aid
AID REQUESTED — NO
APPLICATION STATUS — <Not Specified>
APPLICATION DETAILS — Click for Details...

ADMISSIONS STATUS
INQUIRY DATE — 09/19/08
APPLICATION DATE
VISIT DATE
VISIT — None
ADMISSION COUNSELOR — <None Specified>

Review
LIKELY TO YIELD — <None Specified>
REVIEWERS

Admission
DECISION — N/A
DECISION DATE

Enrollment
DECISION — N/A
DECISION DATE
WITHDRAW REASON — <None>
ENROLLMENT STATUS — N/A

PHOTO
Sample

ADMISSIONS CANDIDATE ... — View Candidate Profile
ADMISSION DETAIL — Click for Details...

Links
APPLICATION — Click for Details...
ENROLLMENT DETAIL — Click for Details...
CITIZENSHIP (LONG)
LANGUAGES (SHORT)
PARENT 3
PARENT 4
ADMISSIONS POINTS

Related Records
If this record includes a link to a related record, the query icon will take you to the related record.

Send Email
The @ symbol indicates that clicking on the email address in the field will allow you to send an email to this person through your email provider.

Date Selection
Click on the calendar icon to select the appropriate date for fields such as birthday or event date.
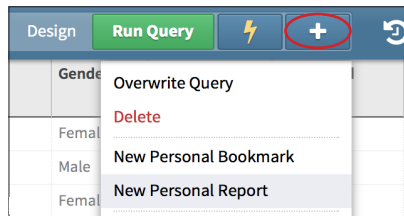
Dropdown Menu
Similar to ES2, click the arrow on a field to select a value from a dropdown.
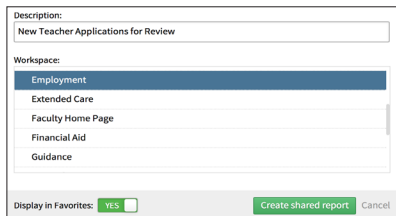
Axiom: Detail Screens

Workspaces

The Workspace functionality allows you to save queries, reports, and records in personalized locations. Workspaces are designed to serve as your filing system for either private or shared access, depending on your needs individually or as a department.
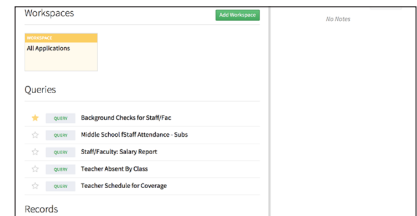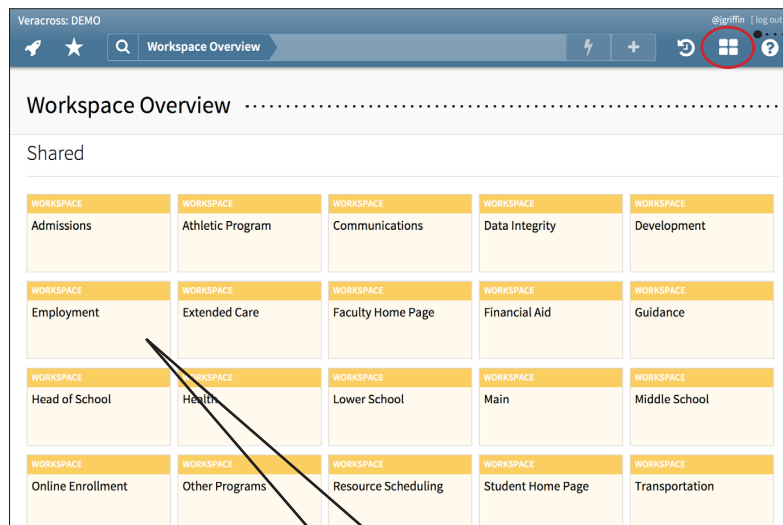
Save a Query or Record to a Workspace:

Choose an action

- Design
- Run Query
- Overwrite Query
- Delete
- New Personal Bookmark
- New Personal Report

Categorize and name

Description:
New Teacher Applications for Review

Workspace:
- Employment
- Extended Care
- Faculty Home Page
- Financial Aid
- Guidance

Display in Favorites: YES | Create shared report | Cancel

Access your report

Workspaces — Add Workspace — No Notes
All Applications

Queries
- QUERY Background Checks for Staff/Fac
- QUERY Middle School Staff Attendance - Subs
- QUERY Staff/Faculty: Salary Report
- QUERY Teacher Absent By Class
- QUERY Teacher Schedule for Coverage

Records

Veracross: DEMO | @jgriffin [log out]
Q | Workspace Overview

Workspace Overview

Shared

WORKSPACE	WORKSPACE	WORKSPACE	WORKSPACE	WORKSPACE
Admissions	Athletic Program	Communications	Data Integrity	Development
Employment	Extended Care	Faculty Home Page	Financial Aid	Guidance
Head of School	Health	Lower School	Main	Middle School
Online Enrollment	Other Programs	Resource Scheduling	Student Home Page	Transportation

Workspaces Access

To open the Workspace Overview, navigate to this icon. The icon is accessible from all pages within Axiom, including queries and detail screens.

Workspace Overview

The Workspace Overview provides a view of all Workspaces available to you. Pick an individual Workspace to access data and reports.

Workspace

Within an existing Workspace, additional sub-Workspaces can be created as for better organization. Click the "Add Workspace" button to make a new Workspace for personal use.

Veracross: DEMO | @jgriffin [log out]
Q | Employment

Workspace Overview ↕
Employment

Workspaces | Add Workspace | Edit Notes

WORKSPACE	WORKSPACE	WORKSPACE
All Applications	Background Checks	New Hires

Reference the All Applications folder for information about prospective employees.

Queries
- ★ QUERY Background Checks for Staff/Fac ✕
- ☆ QUERY Staff/Faculty: Salary Report
- ☆ QUERY Teacher Absent By Class
- ☆ QUERY Teacher Schedule for Coverage

Records
- ☆ DETAIL Faculty: Paul, Larry - Faculty

Queries

The Queries section offers a full list of reports saved within this Workspace. Saved reports display in alphabetical order for easy navigation.

Favorites

If you have a report that's used more frequently than others, add it as a Favorite. You'll also find this report using the star icon in the Launchpad.

Records

Individual records can be bookmarked and saved to a Workspace. Use the Records section to access frequented locations quickly and efficiently.

Add Notes

The Notes section can be used to offer a description of the contents within a Workspace. If the Workspace is shared, use the Notes to provide instructions to other users about particular reports.

Axiom: Workspaces
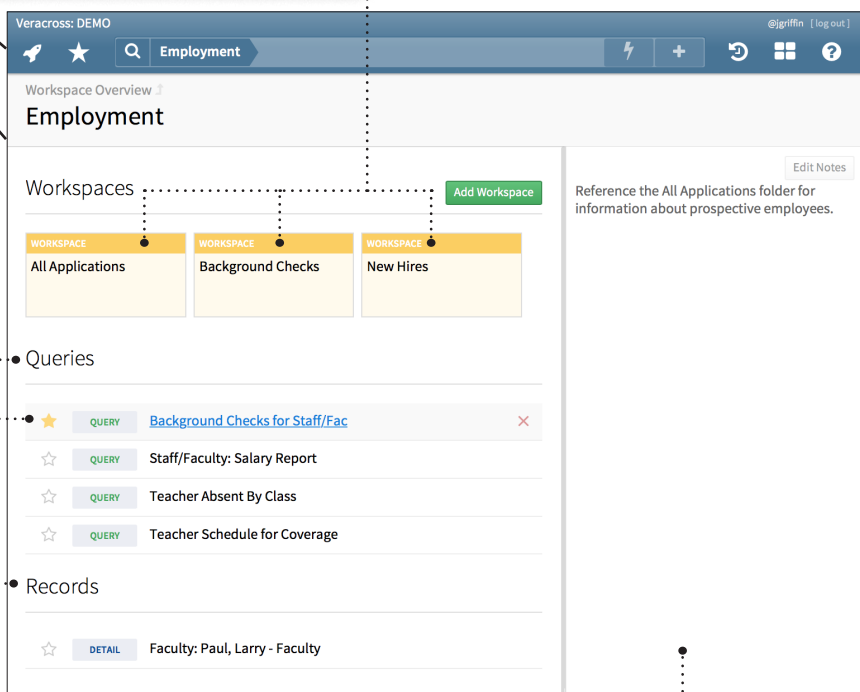
What is a Query?

A query is the tool you'll use for finding detailed information, displaying that information in various formats, and performing actions using your results. Understanding how to use a query is the key to unlocking your school's data.

Search
Can't find a field you need? Use the search bar to type part of the name of the field in question.

Move
Use the drag and drop icon to rearrange the order of your fields.

View
This icon indicates that you'll see this field in your set of results.

Sort
Use this icon to set a sort order on your results. Clicking once sorts ascending; twice, descending; Shift + Click removes.

Sort Level
The sort level number displays the layer of sorting applied to the field.

Run
Running your query is essentially pushing "go." Once the query is run, you'll get results based on your query design.

Veracross: DEMO

@jgriffin [log out]

Main   Student Query *

Run Query

search fields	Query	**Fields**	**Properties**	Style

FIELDS

Full Name

- General
  - **Person ID** .... Person ID
  - Name Prefix .... ☑ ⇄ First Name — begins with smith ✕ >
  - **First Name**
  - Middle Name .... First Name
  - **Last Name** .... Last Name
  - Name Suffix .... Name Search
  - **Full Name** .... Current Grade
  - Preferred Name
  - Maiden Name .... Household
  - **Household** .... Campus
  - Primary Organization
  - Email 1 .... Homeroom
  - Email 2 .... Student Group
  - Birthday .... Advisor
  - Spouse .... Address 1
  - Spouse Name .... City
  - Spouse Full Name .. State
  - Siblings .... Postal Code
  - Related Students
  - Related Alumni
  - Related Former Students
  - Notes
  - Do Not Contact
  - **Classifications**
  - **Mailing Address**

begins with

smith

Use another field as criteria value

SUBTOTAL GROUP HEADERS
Use this field for subtotal headers — NO

SUMMARIZE
Summarize by this field — NO

All Fields

Included Fields

Field Properties

Available Fields
This list presents a full catalog of possible fields. Double click on any field to pull it into your query design.

Remove a Field
Too many fields? Click this icon to remove this particular field from your query design.

Criteria
This setting answers the "what" question: what specific data are you looking for in this field?

Operator
This setting answers the "how" question: how do you want to search for data in this field?

Axiom: Basic Query Design

Advanced Query Design

Query settings offer several tools for customizing your query results. These tools can be used for organizing the columns, highlighting a particular data set, and even changing the format of your query results display.

Filters

Use the filter settings to determine how many rows are visible in your set of results after the query has been run.

Results View

To see your results in a different format, select one of the four options available. In order to use Calendar, Map, or URL Preview, be sure that your results contain relevant data types.

Column Options

The Column Options offer a variety of display formats to change how a field behaves within your set of query results.

Override Display

If you need to rename a particular field (i.e. "Full Name" to "Name"), use the Override Display to give the field a new description.

Background Color

Want to highlight a particular column in your results? Use the Background Color setting to change the shade of the field in the results.

Visibility Options

These options represent shortcuts to change which columns are visible in your query results.

Comments

If you've saved a query and want to write notes or instructions for yourself or for others, the Comments box is the best location.

Summarize

Formerly known as "grouping" in ES2, the Summarize flag can be set to roll up the query results to display a summed record count.

Column Group

If you want to visually group your columns together, use the column group function. Marking columns as part of the same group can help organize your results.

Subtotal

To add a sum to a subset of results, toggle this flag to "Yes." Sorting must be applied in order for subtotaling to function properly.

Student Query

Query | Fields

VISUALIZATION
Select a visualization for the results; then configure the visualization in the sidebar.

Data Grid | Calendar | Map | URL Preview

FILTER RECORD COUNT
Filter the results to only show a certain number or percentage of records.

Show All Records

COMMENTS
Provide instructions for users of this query.

Show all fields
Hide all fields
Rearrange all fields by display status

Properties | **Style**

FORMAT
Background Color

Override Display Format

COLUMN OPTIONS
--

Column Group   0

@jgriffin [log out]

Main   Student Query

Run Query

Query | Fields | Properties | Style

search fields

General
| Person ID
| Name Prefix
| First Name
| Middle Name
| Last Name
| Name Suffix
| Full Name
| Preferred Name
| Maiden Name
| Household
| Primary Organization
| Email 1
| Email 2
| Birthday
| Spouse
| Spouse Name
| Spouse Full Name
| Siblings
| Related Students
| Related Alumni
| Related Former Students
| Notes
| Do Not Contact
Classifications
Mailing Address

FIELDS

Person ID
Full Name   begins with smith
First Name
Last Name
Name Search
Current Grade
Household
Campus
Homeroom
Student Group
Advisor
Address 1
City
State
Postal Code

Full Name

begins with

smith
Use another field as criteria value

SUBTOTAL GROUP HEADERS
Use this field for subtotal headers   NO

SUMMARIZE
Summarize by this field   NO

Query Results

The results of a query present your data as requested through the parameters set on the query design. This view allows the easy manipulation of data within the results grid and offers access to individual records through hyperlinks.

Status Indicator
The asterisk symbol indicates that this query has been modified from the default template. The symbol also appears in the URL at the top of your browser. If you wish to revert back to the default, simply remove the asterisk from the URL.

Design
If you need to change your query settings, click the Design link. This link will bring you back to the query design page to redefine your search and get more specific results.

Action
Click on the lightning icon to perform an action (like batch updating) on this set of query results.

Organize
The plus icon allows you to save your query so that you can use it again. This button opens a menu with options for saving queries in different locations, from your Favorites list to your personal folders.

Veracross: DEMO										@jgriffin [log out]

Main Student Query * Design **Run Query**

	Person ID	Full Name	Current Grade	Homeroom	Advisor	Roles	Enrollment Status	
☐	21386	Smith, Beverly	Grade 3	HR - 3A: Wallace	None	Student (3)	RE: Re-Enrolled	
☐	57911	Smith, Joe	None	<None>	None	Student (None)	N/A	
☐	58813	Smith, Khaelynn	None	<None>	None	Student (None)	N/A	
☐	22006	Smith, Mark	Grade 5	HR - 5C: Munoz	None	Student (5)	RE: Re-Enrolled	
☐	22548	Smith, Matt	Kindergarten	HR - KA: Tomlinson	None	Student (K)	RE: Re-Enrolled	
☐	21387	Smith, Walter	Grade 7	<None>	Newell, Joan	Student (7)	RE: Re-Enrolled	

Select Records
Use the checkbox to select particular records. Having records selected from a query will give you the flexibility to batch update only specific records rather than all of the records in your query results.

Link
Any time the font displays underlined and in blue, a link is present. Click on the link to drill down into a single record. Be sure to check the column header to understand what type of record you'll access through the link.

Results Grid
The results grid displays all data requested through the query design. This screen displays once the query has been run. Each column in the results originates from a field in the query design.