



**NC EDUCATOR
EFFECTIVENESS**

Administration Guide

Report Management

Updated 2/2012

1	Introduction.....	3
2	Using Configured Reports.....	3
3	Custom Roster Reports.....	5
4	Using Ad-Hoc Reporting	7
4.1	Creating an Ad-hoc Report.....	7
4.2	Working with Memorized Ad-hoc Reports	9
4.3	Configuring a Custom Roster Export.....	13
5	Staff Dashboards	14
5.1	Searching for Staff and Creating Groups	15
5.2	Group Dashboards	22
5.3	Group Reports.....	23
5.4	Individual Information	24
6	Course Dashboards.....	25
6.1	Creating Custom Groups based on Instructor	25
6.2	Creating Custom Groups based on Specific Course Details	26
6.3	Group Dashboard.....	28
6.4	Group Reports.....	29
6.5	Individual Course Information	29

1 Introduction

Each of the modules included in your system generates a variety of useful data that can give you great insight into what your organization is doing, and how well they are doing it. Reports can be generated for each module in the system, making visible the patterns of use for each tool, but also allowing access to specific data at the level that you want to see them.

Pre-configured reports can be created and enabled in the system to allow administrators with the appropriate rights to access those reports. These configured reports can provide data in various modules, such as course administration or room management, or on general portal usage and user attributes.

Ad-hoc reporting allows users with reporting access to create their own report on the fly. These reports can include information about users, courses, section rosters, as well as other functionality such as teacher credentialing.

This tutorial covers the administrative functionality associated with the Report Management module, including accessing pre-configured reports and creating new ad-hoc reports.

Because your portal offers great flexibility in terms of customization and modification, the location and appearance of some functions may be slightly different in this tutorial. Differences in portal setup, such as the names of different administration levels, may also affect the look of different options on your portal, but the basic functionality will be the same.

2 Using Configured Reports

Configured reports are the standard reports that Truenorthlogic makes available for the portal, all modules for which reports exist, and assessments and surveys. These reports are available to all superusers and to others who have been given admin rights for reporting, either for the system as a whole, or for a specific module, or for a specific entity.

Administration ?

System Administration

- User Accounts
- Staff Dashboards
- Course Dashboards
- School/Sites
- System URL Manager
- Layout Management
- System Dates
- User Role Viewer

Content Management

- Content Repository
- Content Repository Administration
- Content Channels

Surveys/Assessments

- Assessment Manager
- Performance Assessment Manager
- Survey Manager

Applications

- Course Approval Administration
- Credential Administration
- Course Administration
- Calendar Event Manager
- Reporting
- Ad-Hoc Reporting
- Targeted Announcements

1. From the **Administration** tab, locate the **Applications** channel and click **Reporting**.

Manage Reports

Memorized reports:

Remove Report Edit Portal: Login Statistics by Date for Exceptional Education

Custom reports:

Create Report Custom Roster Report

Remove Report Edit Test Report

Remove Report Edit David custom report

Remove Report Edit Custom Roster Report Arts Integration

Remove Report Edit Location

Create Report

Any reports that have been requested (for systems that employ report queuing) will be listed in the top section of this list. Saved, or “memorized” reports will be listed in the next section.

2. Click **Edit** beside a saved report to modify it.
3. [See screenshot above] To create a new report, click **Create Report** at the bottom of the page.

STEPS

PROGRESS

Select Report Type

Select the module you wish to run the report on: Course Management

Select the report for the module: Conflict Report
(Click [here](#) for report descriptions.)

Cancel Next

4. Select the module or assessment on which to run the report.

5. Select the report from the second drop-down list, based on the first selection.
6. Click **Next**.
7. Select the desired criteria on the following screens depending on the report selected.
8. Click **Done** to run the report.
9. Click **Memorize this Report** at the bottom of the report to save this report to the list of saved reports.

3 Custom Roster Reports

Custom roster reports allow you to select from a large list of roster fields to build a custom report. These reports are automatically memorized.

Note: Much of this functionality is also available directly from the section roster through the *export* functionality. However, roster exports must be pre-configured through the ad-hoc reporting tool. This process is explained in Section 5.

Administration



The screenshot displays the Administration menu with the following channels and their respective items:

- System Administration**
 - User Accounts
 - Staff Dashboards
 - Course Dashboards
 - School/Sites
 - System URL Manager
 - Layout Management
 - System Dates
 - User Role Viewer
- Applications**
 - Course Approval Administration
 - Credential Administration
 - Course Administration
 - Calendar Event Manager
 - Reporting
 - Ad-Hoc Reporting
 - Targeted Announcements
- Content Management**
 - Content Repository
 - Content Repository Administration
 - Content Channels
- Surveys/Assessments**
 - Assessment Manager
 - Performance Assessment Manager
 - Survey Manager

1. From the **Administration** menu, click **Reporting** in the **Applications** channel.

Manage Reports

You have no report job requests.

Custom reports:

Create Report	Custom Roster Report
Remove Report	Edit Class Dates
Remove Report	Edit Instructors
Remove Report	Edit Classes/Participants
Remove Report	Edit Enrollment Date
Remove Report	Edit EQC

2. Click **Create Report** at the top of the list of any previously memorized custom reports.

Edit Custom Report

Enter the custom report title:

Select the fields to be included in the report:

<input checked="" type="checkbox"/> Course Number	<input type="checkbox"/> Course Title
<input type="checkbox"/> Office	<input type="checkbox"/> Course Credits
<input type="checkbox"/> For Certification	<input type="checkbox"/> CPD Credit
<input type="checkbox"/> College Credit	<input type="checkbox"/> Stipend
<input checked="" type="checkbox"/> Section Number	<input type="checkbox"/> Section Title
<input type="checkbox"/> Location	<input type="checkbox"/> Start Date
<input type="checkbox"/> End Date	<input type="checkbox"/> Start Time
<input type="checkbox"/> End Time	<input type="checkbox"/> Instructor
<input type="checkbox"/> Sessions	<input type="checkbox"/> Facility

3. Enter a Title for this custom roster report. The title should distinguish this report from other custom roster reports.
4. Select the options that you want included on the report. Some options are client-specific, while others are generally available. Some options will be pre-selected and cannot be un-selected. Click **Next** at the bottom of the page.

Edit Custom Report Column Order

Select the column order for each group:

Group 1:

- 1 - Course Number
- 1 - Course Title
- 1 - Office

Group 2:

- 1 - Section Number
- 1 - Location

Report Availability (in addition to Super Administrators):

Site Administrators

Office Administrators

[Cancel](#) [Save](#)

5. Roster fields are arranged by groups of related fields. You can select the order that fields are displayed within each group on the report by selecting the sort order.
6. Select the checkbox(es) beside the administrative level(s) that you want to have access to this specific report.
7. Click **Save** at the bottom of the page.

4 Using Ad-Hoc Reporting

Ad-hoc reporting allows those with access to reporting to create their own reports. These reports can not only be run on system users, course and sections, and other module data, but can include data across these areas.

Administration ?

The Administration menu is divided into four main sections:

- System Administration:** User Accounts, Staff Dashboards, Course Dashboards, School/Sites, System URL Manager, Layout Management, System Dates, User Role Viewer.
- Content Management:** Content Repository, Content Repository Administration, Content Channels.
- Surveys/Assessments:** Assessment Manager, Performance Assessment Manager, Survey Manager.
- Applications:** Course Approval Administration, Credential Administration, Course Administration, Calendar Event Manager, Reporting, Ad-Hoc Reporting, Targeted Announcements.

4.1 Creating an Ad-hoc Report

1. On the **Administration** tab, locate the **Applications** channel and click **Ad-Hoc Reporting**.

The Ad-Hoc Reporting interface is split into two columns:

- Primary Report Target:**
 - Assessment Completion:** Displays completion status of assessments. Only shows status of the most recent time the assessment was taken/started.
 - Courses:** Search the courses of the Course Management system. This search can include archived or historical courses. Filtering can be done on targeted demographics.
 - People:** Search the users in the system. Can search by all profile fields. User sites/locations and demographics are also included.
- Memorized Reports:**
 - * 2010 Summer PD
 - course with math
 - Jeremy Test Report
 - Certified SC1
 - Site Admin Report

All of the functionality for which ad-hoc reporting exists is listed on the left side of the screen. Memorized reports, which include a pre-defined set of options, are accessible on the right side.

These options represent only the initial starting place for ad-hoc reports. For example, selecting Courses as the primary starting point allows the users to also select section and roster data to be added to the report.

2. Select the desired starting point for the report by locating the desired report in the left column and clicking **New Report**.

Search People			Show	Sort
Last Name	Contains	<input type="text"/>	<input checked="" type="checkbox"/>	<input checked="" type="radio"/> <input type="radio"/>
First Name	Contains	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="radio"/> <input type="radio"/>
Username	Contains	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="radio"/> <input type="radio"/>
Admin Type	--	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="radio"/> <input type="radio"/>
Current Staff Position	--	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="radio"/> <input type="radio"/>
Employee Id	Contains	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="radio"/> <input type="radio"/>
Primary Email Address	Contains	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="radio"/> <input type="radio"/>
Work Phone	Contains	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="radio"/> <input type="radio"/>
Sites	---	<input type="text"/> <input type="text"/> <input type="text"/>	<input checked="" type="checkbox"/>	<input type="radio"/> <input type="radio"/>
Demographics	<input checked="" type="radio"/> Find users with any of selected demographics or their children <input type="radio"/> Find users with any of selected demographics Click below to expand demographic tree:		<input checked="" type="checkbox"/>	<input type="radio"/> <input type="radio"/>
			Clear all boxes	
<input checked="" type="checkbox"/> Instructional <input checked="" type="checkbox"/> Leadership Team <input checked="" type="checkbox"/> Other <input checked="" type="checkbox"/> School Board <input checked="" type="checkbox"/> Support <input checked="" type="checkbox"/> UNKNOWN JOB CODE				

- Indicate the criteria to be shown on the report by selecting the checkbox in the **Show** column beside the desired criteria.
- You can filter the selected data using the drop-down lists and textboxes on the left side of the screen. The options for filtering differ depending on the type of field.

Demographics	<input checked="" type="radio"/> Find users with any of selected demographics or their children <input type="radio"/> Find users with any of selected demographics Click below to expand demographic tree:	<input checked="" type="checkbox"/>	<input type="radio"/> <input type="radio"/>
		Clear all boxes	
<input checked="" type="checkbox"/> Instructional <input checked="" type="checkbox"/> Leadership Team <ul style="list-style-type: none"> <input type="checkbox"/> Leadership Team <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Position Detail <input checked="" type="checkbox"/> Contract <ul style="list-style-type: none"> <input type="checkbox"/> Leadership Team 12 mo <input type="checkbox"/> Superintendent 12 mo <input checked="" type="checkbox"/> Department 			
<input checked="" type="checkbox"/> Other <input checked="" type="checkbox"/> School Board <input checked="" type="checkbox"/> Support <input checked="" type="checkbox"/> UNKNOWN JOB CODE			

- If you desire to filter, based on demographics, you may choose to be very specific by selecting demographics at their lowest level, or you can be more general by selecting the demographic categories themselves. Selecting a demographic category will not visually indicate that all “children” of that

category are selected, but all will be used to filter the search results and any matching “child” would add the user to the report.

- Use the radio buttons on the right side to indicate up to two categories to sort by on the report. The first radio button indicates the primary sort column and the second filter criterion will be used as a secondary sort. You can sort by additional columns or criteria by exporting the report as a csv file. Use the up and down arrows to indicate whether the columns will be sorted in ascending or descending alphanumeric order. **Note:** Blank fields will be sorted to the bottom alphanumerically, so if you want to locate all blank fields for a particular column, include that column and use it as the primary descending search.

Save this report as:
(Any report with the same name will be overwritten.)

- Select the checkbox and enter a name for this report if you want it to be added to the list of memorized ad-hoc reports. Note: Memorized ad-hoc reports cannot have duplicate names, so if you use a name that is already saved, it will replace the earlier report.
- Click **Search** at the bottom of the page.

Date of Report: 11/20/2009 10:50:56 PM EST
Ad-Hoc Report - People Printer-friendly display
Download CSV
Start a new Ad-Hoc Query

1 2 3 4 5 6 7 8 9 10 11... Next

People											
	Last Name	First Name	Username	Admin Type	Current Staff Position	Employee Id	Primary Email Address	Work Phone	Sites	Demographics	Last Login Date
1.		admin		System Admin	Instructional		noreply@truenorthlogic.com	5555555555	Churchill Road Elem	Adult Alt HS Principal 12 mo	November 20, 2009
2.		Test		User	Leadership Team		noreply@truenorthlogic.com				May 22, 2007
3.		Steve		FCPS Support Admin	Instructional		noreply@truenorthlogic.com		Lanier Middle Lanier Middle	Certified Athletic Trainr 11mo Educ Spec, ABA Lanier Middle	April 1, 2009

The report date, name, and filter criteria are listed in the top right corner of the report. The report is paginated, with up to 250 rows per page.

- Click **Printer-friendly display** to create the report layout without headers.
- Click **Download CSV** to download this file so that it can be manipulated as needed.
- Click **Start a New Ad-Hoc Query** to return to the list of ad-hoc reports.

4.2 Working with Memorized Ad-hoc Reports

Ad-hoc reports can be saved so that the results of the search criteria can be easily accessed without the time and effort involved in setting the search criteria. It is important to realize that the results of the report are not memorized, but the search criteria, meaning that each time the report is accessed, the results are current.

Saved, or memorized, reports can also be shared with others, even if they do not have administrative access to the ad-hoc reporting system.

Ad-Hoc Reporting

Primary Report Target	Memorized Reports
<p>New Report Assessment Completion Displays completion status of assessments. Only shows status of the most recent time the assessment was taken/started.</p>	
<p>New Report Courses Search the courses of the Course Management system. This search can include archived or historical courses. Filtering can be done on targeted demographics.</p>	<p>Run Report 2010 Summer PD Edit</p> <p>Run Report course with math Edit</p> <p>Run Report Jeremy Test Report Edit</p>
<p>New Report People Search the users in the system. Can search by all profile fields. User sites/locations and demographics are also included.</p>	<p>Run Report Certified SC1 Edit</p> <p>Run Report Site Admin Report Edit</p>

The memorized reports are listed in the right hand column for each of the different starting areas for which reports are run.

1. [Above] To edit a saved report, click the name of the report in the right side column.
2. [Above] Click **Edit** beside the name of a saved report in the right side column.

<p>Memorized Report</p> <p>Title: <input type="text" value="Formative Evaluation of Instructional Practices"/></p> <p>Description: <input type="text"/></p> <p>< Back Save Report Details Delete this Report Schedule an Export Run this Report</p>	<p>Published To</p> <p>This report is not published to any users at this time.</p> <p>Add User</p>
---	---

This screen shows information about this report, but will only be as specific as the description that is included. The individual users who have access to this report, if any, are listed on the right side. The report can be run from this screen, or deleted.

3. Edit the **Title** of the report, if desired.
4. Enter a **Description** for the report, if desired.
5. If the title and/or description are edited, click **Save Report Details**.

6. Click **Schedule an Export** to have a report run automatically at a specific time or on a reoccurring basis.

Schedule an Export for "Formative Evaluation of Instructional Practices"

Export Title:

Export Start Date:

Export Time:

Recurring:

Recurrence Pattern: N/A

Range of Recurrence: N/A

Recipients:
(Comma separated list of email addresses)

Ftp Server:

Ftp Port:

Ftp Username:

Ftp Password:

Ftp Protocol:

Column Order:
(Drag and Drop to Reorder)

- # Observee Last Name
- # Observee First Name
- # Observer Last Name
- # Observer First Name
- # Framework
- # Observation Date
- # Domain
- # Component
- # Rating/Feedback

- a. Enter a title for the report being exported.
- b. Enter the date and time for the export to occur. If desired, the export can be scheduled to run on a recurring basis. To set as a recurring export, indicate whether the exports will take place on a daily, weekly, or monthly basis. Additional, individual dates can also be set up.

Recurring:	<input type="text" value="Daily"/>	Recurrence Pattern:	Recur every <input type="text" value=""/> week(s) on: <input type="checkbox"/> Sunday <input type="checkbox"/> Monday <input type="checkbox"/> Tuesday <input type="checkbox"/> Wednesday <input type="checkbox"/> Thursday <input type="checkbox"/> Friday <input type="checkbox"/> Saturday
Recurrence Pattern:	<input type="radio"/> Every <input type="text" value=""/> days <input type="radio"/> Every weekday	Range of Recurrence:	<input type="radio"/> End after: <input type="text" value=""/> occurrences. <input type="radio"/> End by: <input type="text" value="03/28/2012"/>

Recurring:	<input type="text" value="Monthly"/>	Recurring:	<input type="text" value="Specify Additional Dates"/>
Recurrence Pattern:	<input type="radio"/> Day <input type="text" value=""/> of every <input type="text" value=""/> month(s) <input type="radio"/> The <input type="text" value="First"/> <input type="text" value="Monday"/> of every <input type="text" value=""/> month(s)	Recurrence Pattern:	<input type="text" value=""/> <input type="button" value="Reset"/>
Range of Recurrence:	<input type="radio"/> End after: <input type="text" value=""/> occurrences. <input type="radio"/> End by: <input type="text" value="03/28/2012"/>	Range of Recurrence:	N/A

- c. Enter any email addresses to which the export should be sent.
- d. Enter information for having the report exported to an FTP server, if desired.

7. Click **Add User** in the right side column to publish the report to others. Saved reports can be shared with admins, who typically already have access to run their own reports, but also with users who do not have access to reporting functionality.

8. Drag and drop the data fields in the order desired for the columns to appear in the report.
9. Click **Save**.

The People search criteria from the ad-hoc reporting tool will be displayed, allowing you to select the users to access this report using any combination of search criteria.

10. Specify the desired criteria and click **Search**.

People								
First Name contains 'bob'								
		Last Name	First Name	Admin Type	Current Staff Position	Employee Id	Sites	Demographics
1.	<input type="checkbox"/>		Bobbi	User	Other		Short Term Subs/Temporary Employees	Substitute
2.	<input type="checkbox"/>		Bobbie	User	Other		Department of Staffing Short Term Subs/Temporary Employees	Substitute
3.	<input type="checkbox"/>		Bobby	User	Supporting Services Staff		Department of Transportation	Transportation
4.	<input type="checkbox"/>		Bobbie	User	Teacher		Seven Locks Elementary School	3rd Grade Elementary Classroom Teacher

11. Select the checkbox beside the desired individual and click **Select**. Then click **Finish** on the next screen.

Published To			
	Last Name	First Name	Sites
X	devore	bob	

[Add User](#)

The list of users who will be able to access this report will be updated.

The users who have shared access to this saved report will find it listed in the My Reports channel, or wherever it has been added to their specific layout.

My Reports
Courses: Mission Control Courses

The user will not have access to the report criteria, except the dates, meaning that users who have access to a report also have access to change the dates for any of the search criteria.

4.3 Configuring a Custom Roster Export

Custom roster reports allow you to create and memorize reports to meet specific needs for information. These are available through the reporting tool. However, section roster reporting is also available through the roster export functionality. In order to take advantage of this tool, however, the export must be pre-defined through the ad-hoc tool.

1. On the Administration tab, locate the Ad-hoc Reporting tool.

Ad-Hoc Reporting	
Primary Report Target	Memorized Reports
<p>New Report Assessment Completion Displays completion status of assessments. Only shows status of the most recent time the assessment was taken/started.</p>	
<p>New Report Buildings/Rooms Search the rooms and buildings configured in the Room Management system. Can search by capacity, available equipment/setup etc.</p>	<p>Run Report Report Room Bookings - 753 Edit</p> <p>Run Report Report Room Requests - School 095 Edit</p>

2. Locate the **Roster** section and click **New Report**.

Search Roster		Show	Sort
Last Name	Contains <input type="text"/>	<input checked="" type="checkbox"/>	<input checked="" type="radio"/> <input type="radio"/>
First Name	Contains <input type="text"/>	<input checked="" type="checkbox"/>	<input checked="" type="radio"/> <input type="radio"/>
Registration Status	-- <input type="text"/>	<input checked="" type="checkbox"/>	<input checked="" type="radio"/> <input type="radio"/>
Grade	-- <input type="text"/>	<input checked="" type="checkbox"/>	<input checked="" type="radio"/> <input type="radio"/>
Credit Hours	-- <input type="text"/>	<input checked="" type="checkbox"/>	<input checked="" type="radio"/> <input type="radio"/>
Enrolled On:	Equals <input type="text"/> <input type="button" value="Reset"/>	<input checked="" type="checkbox"/>	<input checked="" type="radio"/> <input type="radio"/>

3. Do not select any search criteria.
4. Select the checkboxes to indicate the columns to be shown in the roster export.
5. Use the radio buttons to indicate the sort order for the columns. The left hand radio button indicates the primary sort, with the right button indicating a secondary sort. You can also use the arrows at the top of the sort column to indicate the direction, alpha-numerically or by date, for the sort.

<input type="checkbox"/> Save this report as: <input type="text"/>
(Any report with the same name will be overwritten.)
<input type="button" value="Clear"/> <input type="button" value="Search"/>

6. At the bottom of the form, select the checkbox to save the report and enter a name that will describe it. **Important:** The name must begin with “**Export:**”.
7. Click **Search**.

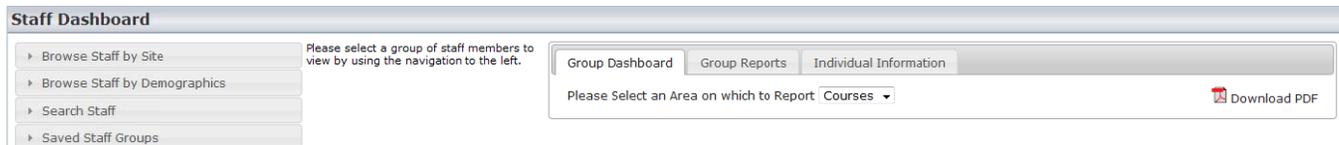
The report is now available to run on any section roster simply by clicking the **Export** button at the top of the roster and choosing the desired export report.

5 Staff Dashboards

Dashboards bring all of the most important reporting functionality to a single screen, providing single-click access to related functionality, group-wide reporting (Phase II), and drill-down options to focus on individual-level reporting within the group.

These dashboards are available for system administrators and are automatically configured for the correct level of administrative rights, meaning that site administrators will have access only for the users at their site(s), while district level administrators will be able to access all users within the district.

The Staff Dashboard may be accessed from a separate tab, labeled by the client. Examples might include **My Staff**, or **Staff Dashboard**. Another option is to access it from the **Administration** tab.



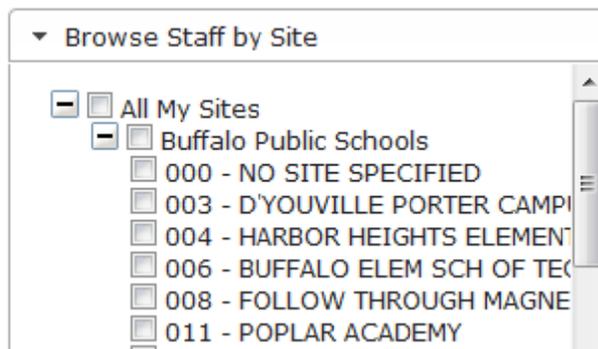
5.1 Searching for Staff and Creating Groups

There are several options for locating individuals and groups. Each provides you with different search criteria, but when users or groups are located, the results are similar – the list of individuals or groups that meet the search criteria is shown, as well as metrics for the selected individuals or group. From there, you can create and manage custom groups.

Browsing for Staff by Site

This option allows you to choose one or more sites or levels, depending on your system rights, and to work with individuals or groups of individuals from those results.

1. Click **Browse Staff by Site**.

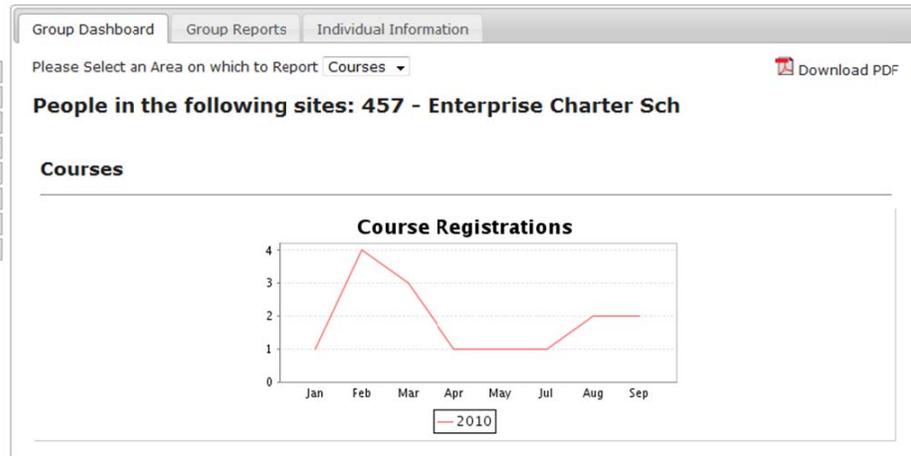


2. Use the + signs to locate the specific site(s) to be included.
3. Select the checkbox(es) for the desired site(s).

People in the following sites: 457 - Enterprise Charter Sch

[Save this Group](#)

1.		RORY
2.		KAREN
3.		MELINDA
4.		CARA
5.		ELYSE
6.		THERESA
7.		TEST
8.		KAREN



- The list of all users at the selected site(s) will be generated and metrics will be displayed for those users as well.

Group Dashboard | Group Reports | Individual Information

Please Select an Area on which to Report: Learning Opportunities ▾

- Use the drop-down list at the top of the metrics to specify a module to report on for this group.
- Click **Download PDF** to generate a printable copy of the selected metrics for this group.
- Click **Save this Group** at the top of the user list to create a new custom group.

Create/Edit Staff Group

Group Details

Group Name:

Description:

Keep group members updated dynamically

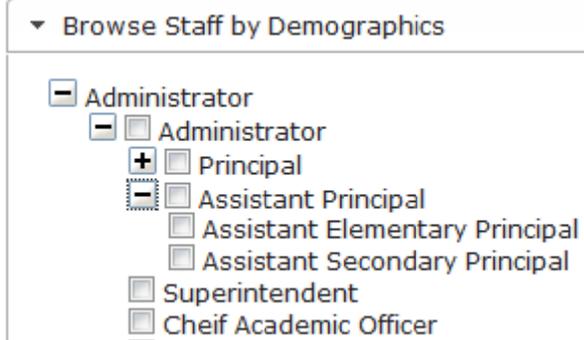
- Enter a **Group Name** to define this new group.
- Enter a **Description** for the group. This will be displayed only on the staff dashboard.

10. Select the checkbox if you want this group to be updated dynamically. That means that users who are aligned with the selected sites will be automatically added to this group, even if they are added to the site later. A user who is removed from a site will also be removed from the group.
11. Click **Save** at the bottom of the page.
12. Add additional group members, if desired.
13. Click **Done** to complete the group and return to the main dashboard screen.

Browsing for Staff by Demographics

This option allows you to search for individuals by staff position or other demographic information. Groups can easily be built for users with specific demographics, such as a group for all Elementary Principals within a district.

1. Click **Browse Staff by Demographics**.



2. Use the + signs to locate the desired demographics.
3. Select the checkbox(es) beside the desired demographic(s) to include.

People in the following sites: 457 - Enterprise Charter Sch

[Save this Group](#)

1.		RORY
2.		KAREN
3.		MELINDA
4.		CARA
5.		ELYSE
6.		THERESA
7.		TEST
8.		KAREN

Group Dashboard | Group Reports | Individual Information

Please Select an Area on which to Report: Courses

[Download PDF](#)

People in the following sites: 457 - Enterprise Charter Sch

Courses

Course Registrations

Month	Registrations
Jan	1
Feb	4
Mar	3
Apr	1
May	1
Jul	1
Aug	2
Sep	2

- The list of all users at the selected site(s) will be generated and metrics will be displayed for those users as well.

Group Dashboard | Group Reports | Individual Information

Please Select an Area on which to Report: Learning Opportunities

- Use the drop-down list at the top of the metrics to specify a module to report on for this group.
- Click **Download PDF** to generate a printable copy of the selected metrics for this group.
- Click **Save this Group** at the top of the user list to create a new custom group.

Create/Edit Staff Group

Group Details

Group Name:

Description:

Keep group members updated dynamically

- Enter a **Group Name** to define this new group.
- Enter a **Description** for the group. This will be displayed only on the staff dashboard.

10. Select the checkbox if you want this group to be updated dynamically. That means that users who are aligned with the selected sites will be automatically added to this group, even if they are added to the site later. A user who is removed from a site will also be removed from the group.
11. Click **Save** at the bottom of the page.
12. Add additional group members, if desired.
13. Click **Done** to complete the group and return to the main dashboard screen.

Searching for Staff by Specific Criteria

This will allow you to locate individuals based on a wide variety of search criteria, such as username, email address, date of last login, etc.

1. Click **Search Staff**.

▼ Search Staff

Last Name
Contains ▼
[Text Box]

First Name
Contains ▼
[Text Box]

Username
Contains ▼
[Text Box]

Admin Type
-- ▼

Current Staff Position
-- ▼

Employee ID
Contains ▼
[Text Box]

Primary Email Address
Contains ▼
[Text Box]

Home Phone
Contains ▼
[Text Box]

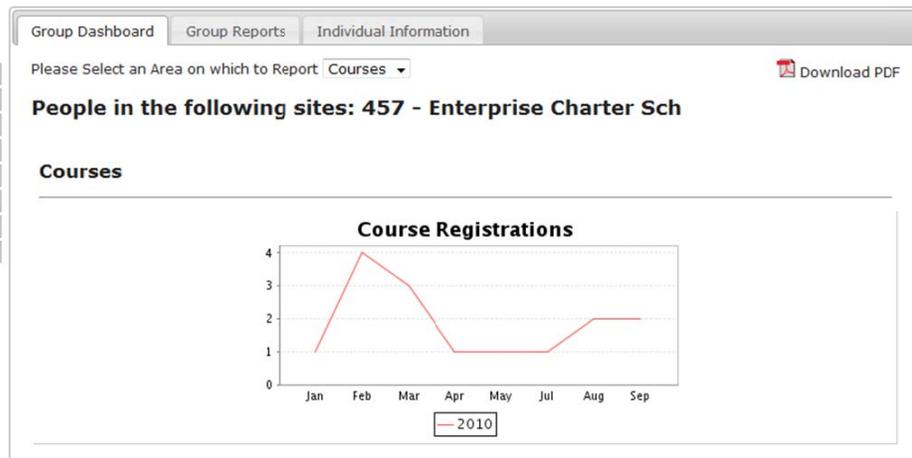
Home Location
--

2. Use the text boxes to enter any desired search criteria, and the drop-down lists to specify how that criterion will be treated by the search engine.
3. Click **Search** at the bottom of the form to run the search.

People in the following sites: 457 - Enterprise Charter Sch

Save this Group

1.		RORY
2.		KAREN
3.		MELINDA
4.		CARA
5.		ELYSE
6.		THERESA
7.		TEST
8.		KAREN



- The list of all users at the selected site(s) will be generated and metrics will be displayed for those users as well.

Group Dashboard | Group Reports | Individual Information

Please Select an Area on which to Report Learning Opportunities ▾

- Use the drop-down list at the top of the metrics to specify a module to report on for this group.
- Click **Download PDF** to generate a printable copy of the selected metrics for this group.
- Click **Save this Group** at the top of the user list to create a new custom group.

Create/Edit Staff Group

Group Details

Group Name:

Description:

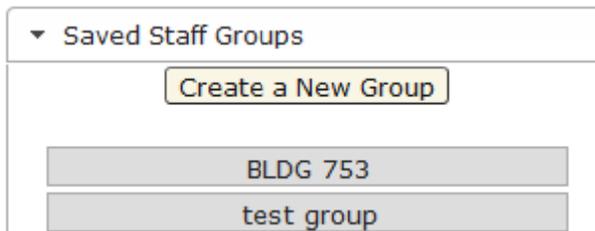
Keep group members updated dynamically

- Enter a **Group Name** to define this new group.
- Enter a **Description** for the group. This will be displayed only on the staff dashboard.

10. Select the checkbox if you want this group to be updated dynamically. That means that users who are aligned with the selected sites will be automatically added to this group, even if they are added to the site later. A user who is removed from a site will also be removed from the group.
11. Click **Save** at the bottom of the page.
12. Add additional group members, if desired.
13. Click **Done** to complete the group and return to the main dashboard screen.

Accessing Saved Staff Groups

1. Click **Saved Staff Groups**.

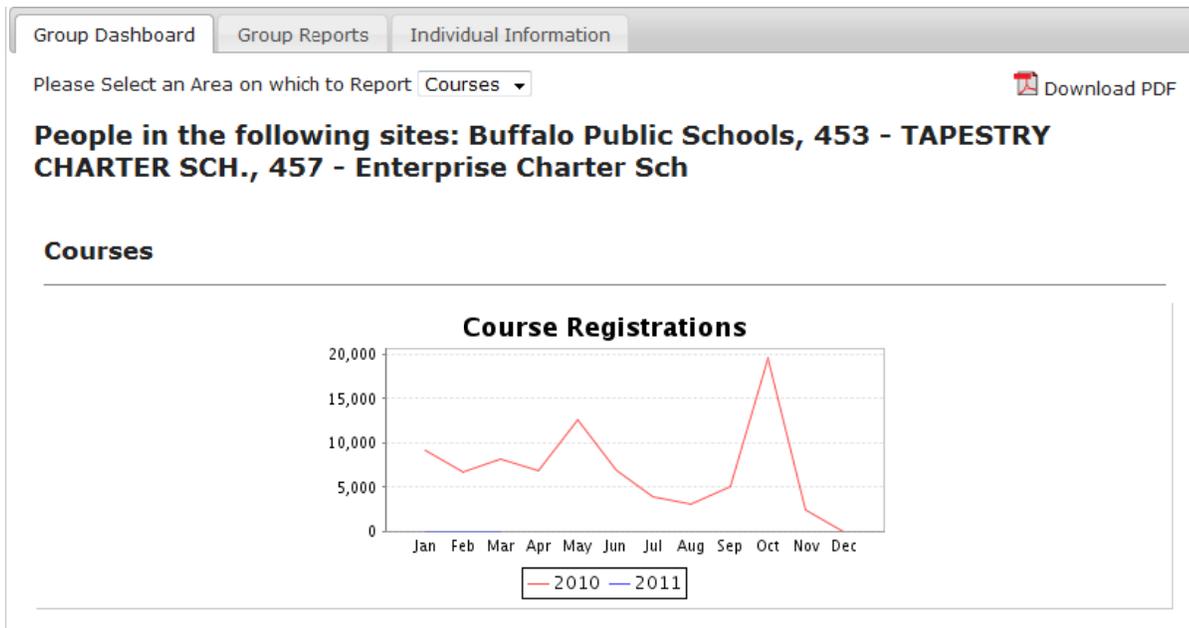


2. Click on the name of a saved group to load that group information and edit a group, if desired.
3. Click **Create a New Group** to create a new group. The initial membership of the group will not be based on any criteria (site, demographics, etc.), so group members will need to be added after the group itself is created.

5.2 Group Dashboards

The group dashboard shows a list of all members of a saved group and metrics for that group as a whole, such as a graph of course registrations or a chart showing login patterns for the group. This information can also be shown for a custom group of individuals that is not saved as a formal group simply by searching for, and selecting, users based on site, demographics, or other criteria.

1. Select a group of users to view.
2. Select the **Group Dashboard** tab in the reporting section of the screen.



- Use the drop-down list at the top of the metrics to select the module to report on for the displayed group.
- Click Download PDF to create a printable version of the selected metrics.
- Click the “drill-down” icon [] beside any graph (that has the icon) to access the specific data from which the graph was generated.

5.3 Group Reports

Assessment reports, which are typically available by location through the regular report management functionality, can be run for a custom group of users through the Staff Dashboard.

- Select the group of users.
- Select the **Group Reports** tab on the right side of the screen.



3. Select the desired report (Completion Status or Proficiency Analysis).
4. After viewing the results, the report can be downloaded as a PDF.

5.4 Individual Information

Through the Staff Dashboard, you can quickly access information across multiple modules for any individual.

1. Search for the individual or locate them in a saved group.
2. Select the individual in the group list.

People in the following sites: 457 - Enterprise Charter Sch

Save this Group

1.		RORY
2.		KAREN
3.		MELINDA
4.		CARA
5.		ELYSE
6.		THERESA
7.	USER, TEST	
8.		KAREN

3. Select the **Individual Information** tab in the reporting area. Tabs for each of the modules for which there is information will be displayed, in addition to basic user information.

User Information – Basic information that includes contact information, location, and demographics. The date and time of last login is also displayed.

Courses – All learning opportunities for which the selected user is currently registered, showing the learning opportunity, section, and registration status.

Transcript – A historical record of learning opportunities that the selected user has registered for, including details about the opportunity, as well as credit, grade, and registration status. There is also a link to access the complete transcript from this view.

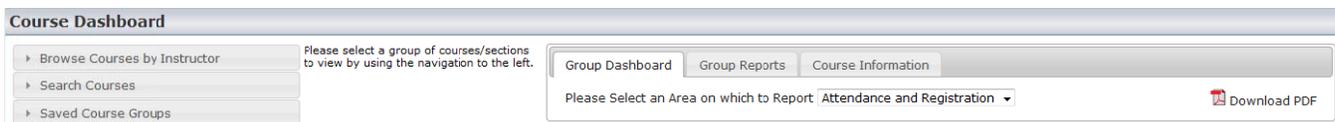
Credentials – A look at the user’s credentials, showing the status and critical dates. A link allows you to access the complete transcript for this user.

Plans / Evaluations – A view of each of the plans (from Program Management) that user is a participant of, with the status of the plan and a link to access it directly from here.

6 Course Dashboards

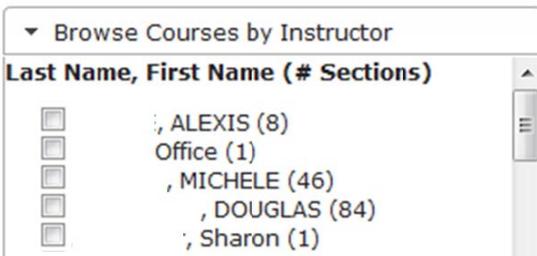
In the same way that Staff Dashboards allow you to create custom groups of users in order to report on the group, Course Dashboards allow you to create custom groups of learning opportunities and access aggregated metrics for the group, including course information, attendance and completion, and survey completion and results.

Course Dashboards are located on the **Administration** tab.



6.1 Creating Custom Groups based on Instructor

1. Click Browse Courses by Instructor.



The names of all instructors in the system will be listed, with the number of total sections instructed in parentheses.

2. Select the checkbox(es) beside the instructor(s) that you want to add to the custom group.

Sections with the following Instructors:

Save this Group

1. 2028: Bennett #200 Early Release PLO M
8505: Early Release Day (May 17th)
2. 2032: Bennett #200 Superintendent's Cc
8527: Superintendent's Conference Day
3. 1384: School 089 Staff Development Da
4739: School 89 December 9, 2009 Profi

1. After adding all desired instructors, click **Save this Group** above the list of courses in the middle section of the screen.

Course Number	Course Title	Section Number	Section Title
1. 1407	BUATA Mentor Training(Cohort One, Cohort Two, & Cohort Three Mentors)	5071	December 12, 2009- Cohort Two Mentors only
2. 1407	BUATA Mentor Training(Cohort One, Cohort Two, & Cohort Three Mentors)	5872	November 18, 2009- Mentor Training for Cohort Two Only
3. 1407	BUATA Mentor Training(Cohort One, Cohort Two, & Cohort Three Mentors)	5895	September 19, 2009- Summer Recap (Cohort Two mentors only)
4. 2186	BUATA PLO Sessions (Cohort Three)	9914	PLO #1
5. 2360	Curriculum Committee- Visual Arts	10691	December 15
6. 2360	Curriculum Committee- Visual Arts	10691	February 16
7. 2745	Ed Trust Initiative - Group 1	12876	Education Trust - Group 1 (H.S. Counselors)

2. Complete the Group Name and Description. Indicate whether or not you want to have courses automatically added to this list if they meet the search criteria.

Saved groups are accessible at the bottom of the group creation options as **Saved Course Groups**.

6.2 Creating Custom Groups based on Specific Course Details

3. Click **Search Courses**.

4. Select the desired search criteria. The search will return only those learning opportunities that match all search criteria selected. The options are very specific, but the general areas of information include:
 - Section title or number
 - Dates
 - Locations
 - Instructors
 - Release status
 - Course Title
 - Course Details
 - Surveys
 - Targeted Locations
 - Targeted Demographics

5. Click **Search** at the bottom of the form.

Maximum Number of Participants less than or equal 4
 Required demographics: Teacher, 1st Grade, 2nd Grade or any of their children.

Save this Group

1. 1407: BUATA Mentor Training(Cohort O 5871: December 12, 2009- Cohort Two
2. 1407: BUATA Mentor Training(Cohort O 5872: November 18, 2009- Mentor Trai

The search criteria will be listed at the top of the results and each of the learning opportunities that matches all search criteria will be listed.

6. Click **Save this Group** above the list of courses in the middle section of the screen.

Create/Edit Staff Group				
Group Details		Group Members		
Group Name:	<input type="text"/>	Course Number	Course Title	Section Number
Description:	<input type="text"/>	1. 1407	BUATA Mentor Training(Cohort One, Cohort Two, & Cohort Three Mentors)	5071
		2. 1407	BUATA Mentor Training(Cohort One, Cohort Two, & Cohort Three Mentors)	5872
		3. 1407	BUATA Mentor Training(Cohort One, Cohort Two, & Cohort Three Mentors)	5895
		4. 2186	BUATA PLO Sessions (Cohort Three)	9914
		5. 2360	Curriculum Committee- Visual Arts	10691
		6. 2360	Curriculum Committee- Visual Arts	10691
		7. 2745	Ed Trust Initiative - Group 1	12071
	<input type="checkbox"/> Keep group members updated dynamically			

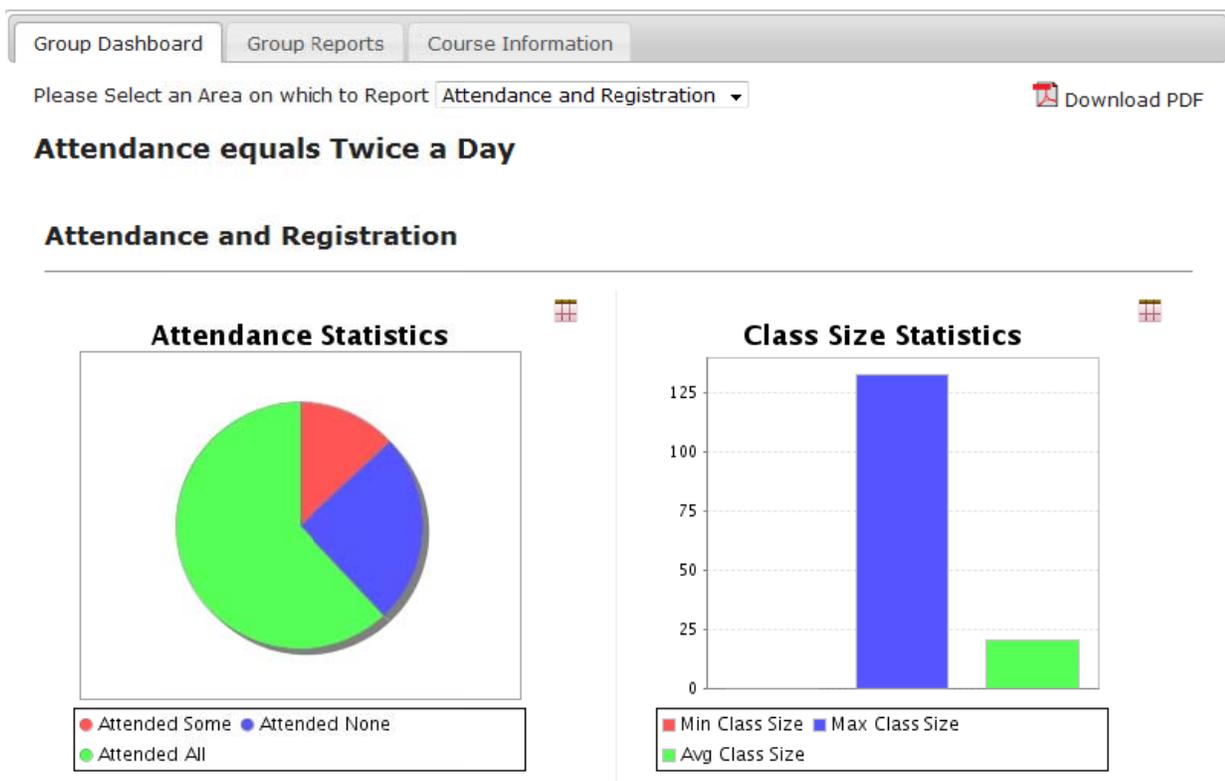
7. Complete the Group Name and Description. Indicate whether or not you want to have courses automatically added to this list if they meet the search criteria.

Saved groups are accessible at the bottom of the group creation options as **Saved Course Groups**.

6.3 Group Dashboard

The group dashboard shows aggregated information for all of the courses in the selected group. This information includes such things as attendance, the number of courses created, and a yearly calendar showing when sections are offered.

6. Create or select a custom group.
7. Select the Group Dashboard tab on the right side of the screen (it is selected as default).

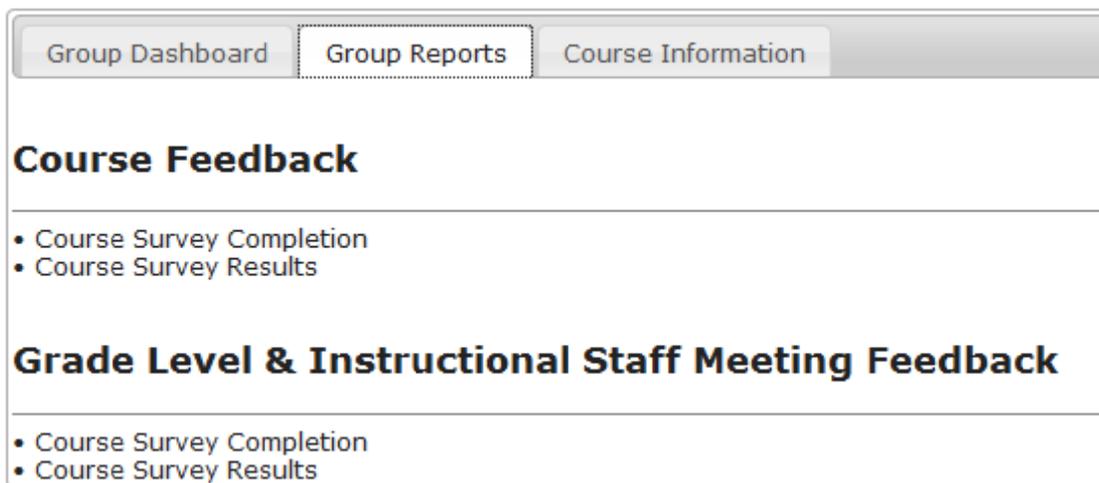


8. Use the drop-down list to select the specific information you want to see.
9. Click Download PDF to load a printable copy of the information shown on the screen.
10. Click the “drill-down” icon  beside any graph (that has the icon) to access the specific data from which the graph was generated.

6.4 Group Reports

Group reports allow you to aggregate learning opportunity survey data for the selected custom group of learning opportunities.

1. Create or select a custom group of learning opportunities.
2. Click the Group Reports tab on the right side of the screen.



3. Select the desired report.
4. After viewing the results, you can choose to download or print them.

6.5 Individual Course Information

You can get information about any single learning opportunity section through the Course Dashboard.

1. Locate the desired learning opportunity section, either by searching for it, or by finding it in a custom group.
2. Select the learning opportunity section in the list in the middle of the screen.
3. The information for that specific learning opportunity section is shown at the right of the screen.

The screenshot shows a software interface with two main panels. The left panel, titled "Attendance equals Twice a Day", contains a list of five learning opportunities. The third item is highlighted in orange. The right panel, titled "Course Information", displays details for the selected course.

Attendance equals Twice a Day	
1.	1371: Advanced eSIS Training 4668: Cluster 1
2.	1371: Advanced eSIS Training 4670: Cluster 2
3.	1371: Advanced eSIS Training 4669: Cluster 3
4.	1051: Cognitive Coaching 2826: June 1, 2009
5.	1051: Cognitive Coaching 2825: June 2, 2009

Course Information	
Course	Section
Course #:	1371
Course Title:	Advanced eSIS Training
Course Description:	An indepth training of the district wide st supports to be covered.
Prerequisites:	

4. Click the desired tab to see information about the learning opportunity section:

Course Information – Displays the course details on the learning opportunity creation form, from which the selected section was created.

Section Information – Displays the section details from the section creation form.

Roster / Waitlist – A quick overview of both the roster and waitlist, showing the names of the participants, their location, demographics, registration status, and enrollment date.

Surveys – Links to the specific survey data for this section.