HOME BASE
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.

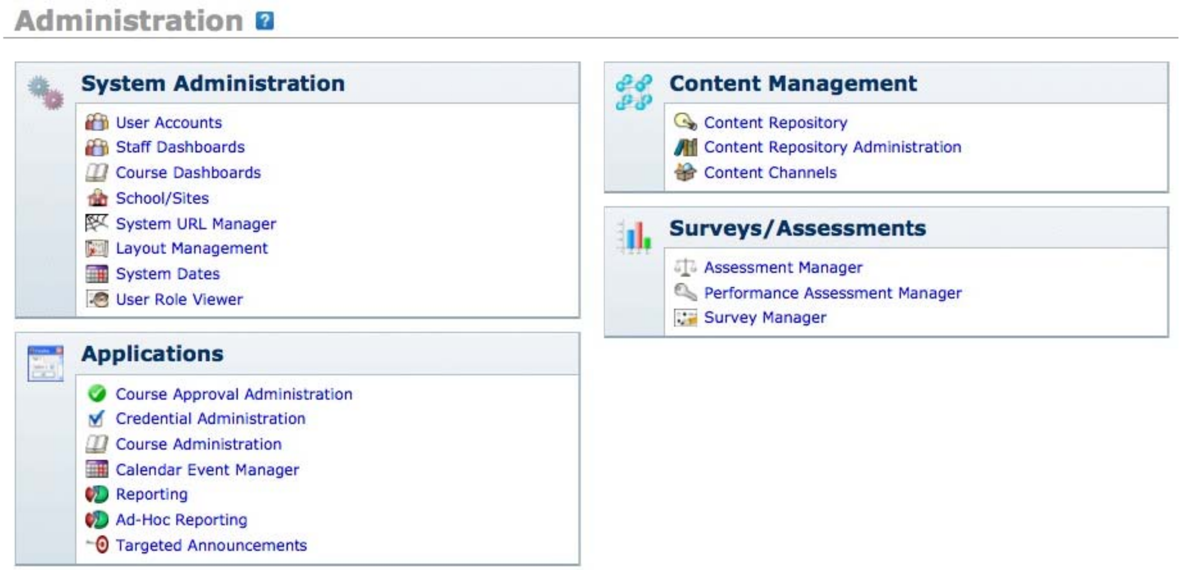
Ad-hoc reporting allows users with reporting access to create their own report on the fly. These reports can include information about users, courses, section rosters, as well as other functionality such as teacher credentialing.

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

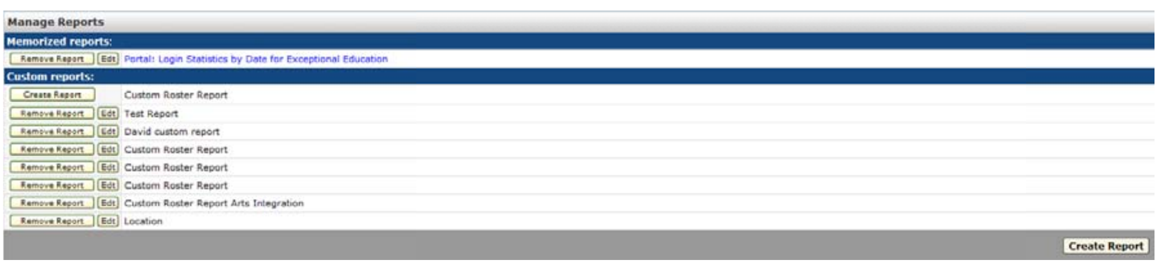
Because your portal offers great flexibility in terms of customization and modification, the location and appearance of some functions may be slightly different in this tutorial. Differences in portal setup, such as the names of different administration levels, may also affect the look of different options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



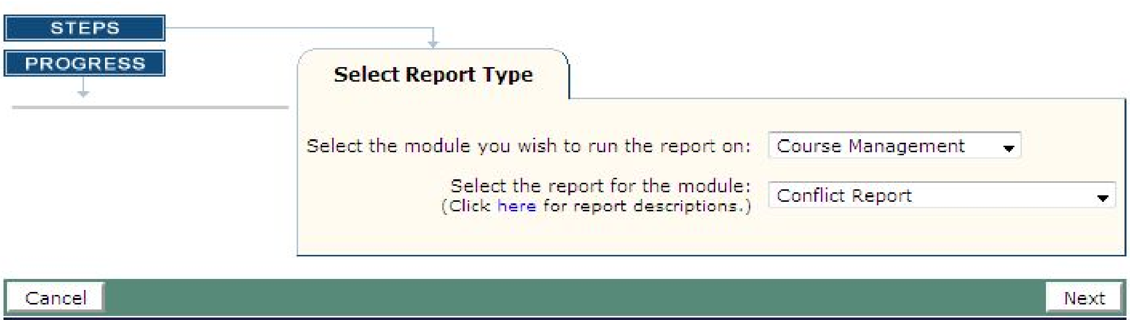
1. From the **Administration** tab, locate the **Applications** channel and click **Reporting**.



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.



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.

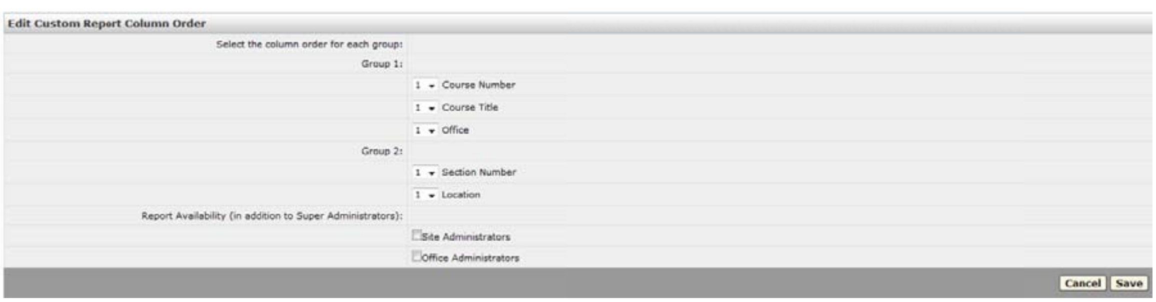
Note: Much of this functionality is also available directly from the section roster through the *export* functionality. However, roster exports must be pre-configured through the ad-hoc reporting tool. This process is explained in Section 5.

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

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

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.



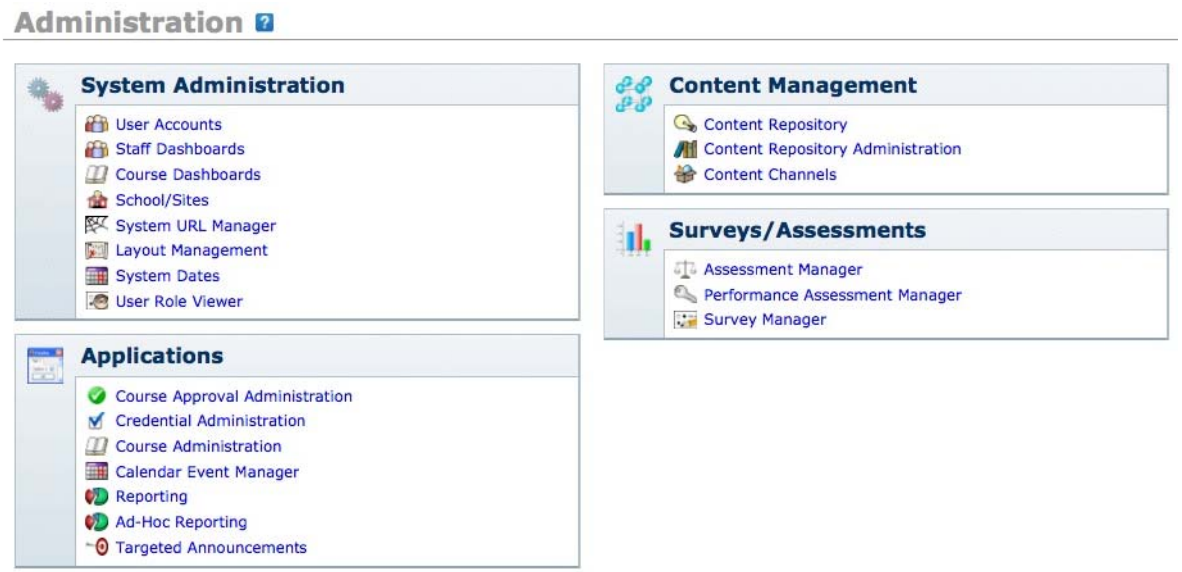
5. Roster fields are arranged by groups of related fields. You can select the order that fields are displayed within each group on the report by selecting the sort order.

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.

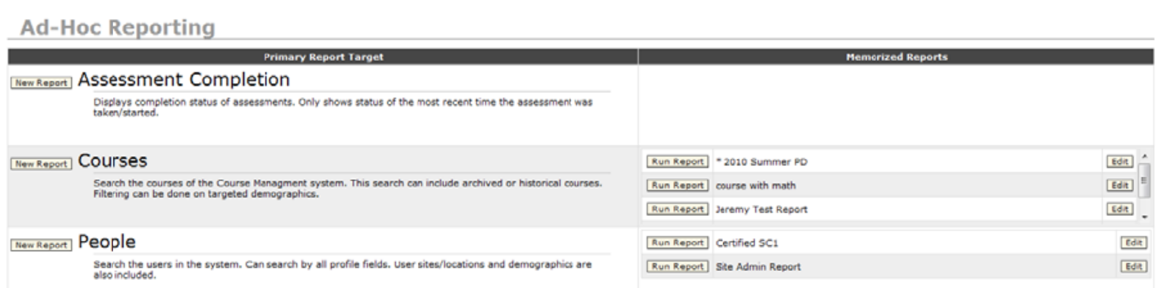
4 Using Ad-Hoc Reporting

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.



4.1 Creating an Ad-hoc Report

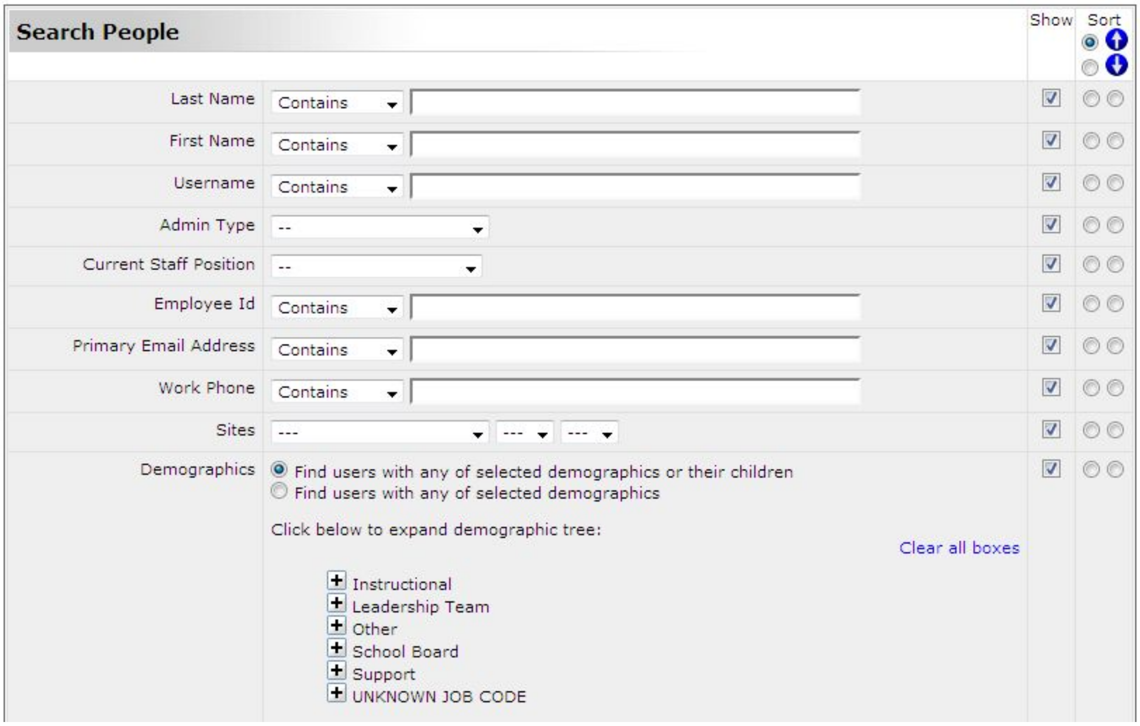
1. On the **Administration** tab, locate the **Applications** channel and click **Ad-Hoc Reporting**.



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.

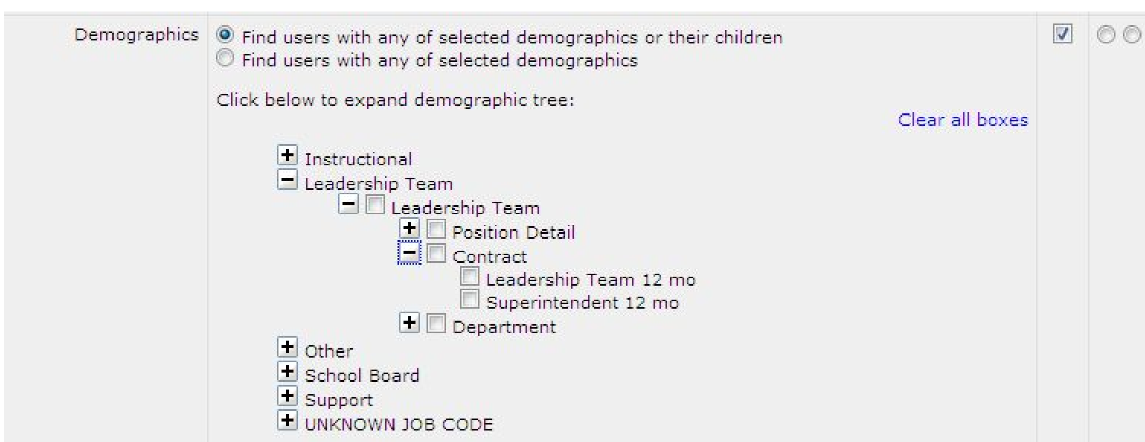
These options represent only the initial starting place for ad-hoc reports. For example, selecting Courses as the primary starting point allows the users to also select section and roster data to be added to the report.

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



3. Indicate the criteria to be shown on the report by selecting the checkbox in the **Show** column beside the desired criteria.

4. 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.



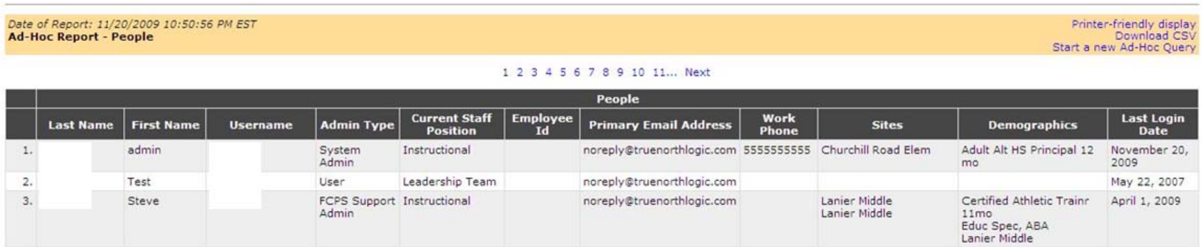
5. If you desire to filter, based on demographics, you may choose to be very specific by selecting demographics at their lowest level, or you can be more general by selecting the demographic categories themselves. Selecting a demographic category will not visually indicate that all “children” of that

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

6. 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.

7. 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.

8. 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.

9. Click **Printer-friendly display** to create the report layout without headers.

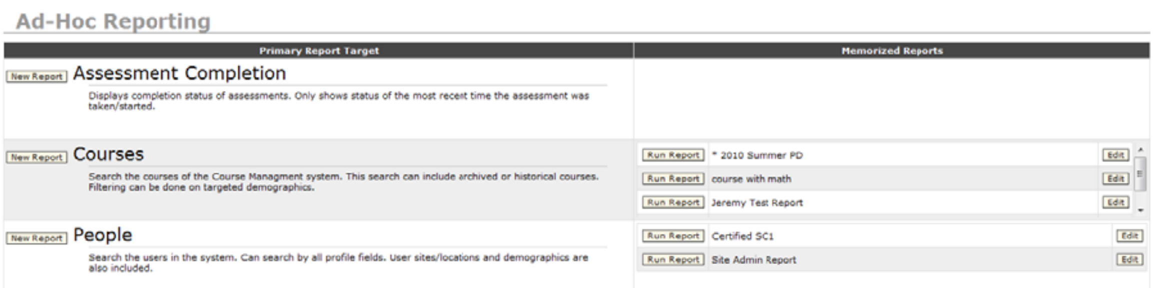
10. Click **Download CSV** to download this file so that it can be manipulated as needed.

11. 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.



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.

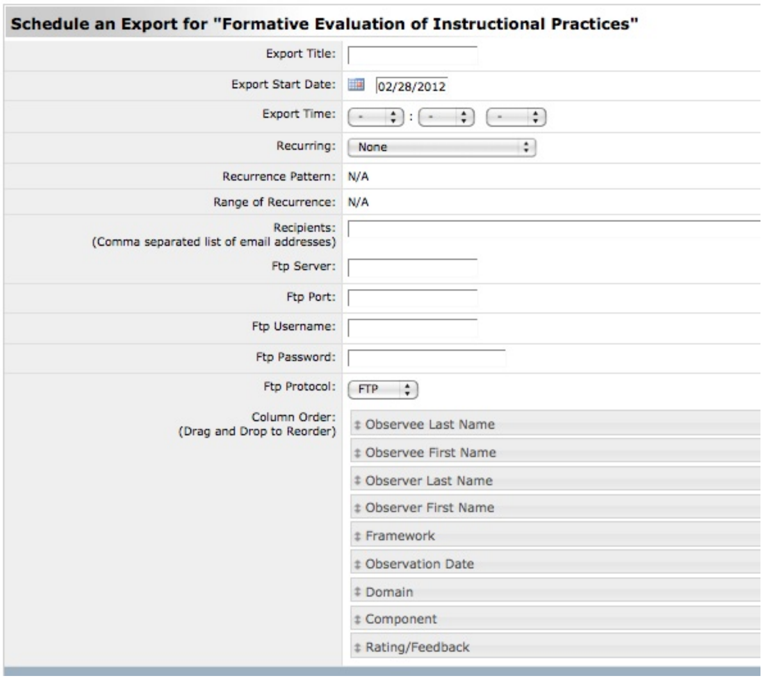
This screen shows information about this report, but will only be as specific as the description that is included. The individual users who have access to this report, if any, are listed on the right side. The report can be run from this screen, or deleted.

3. Edit the **Title** of the report, if desired.

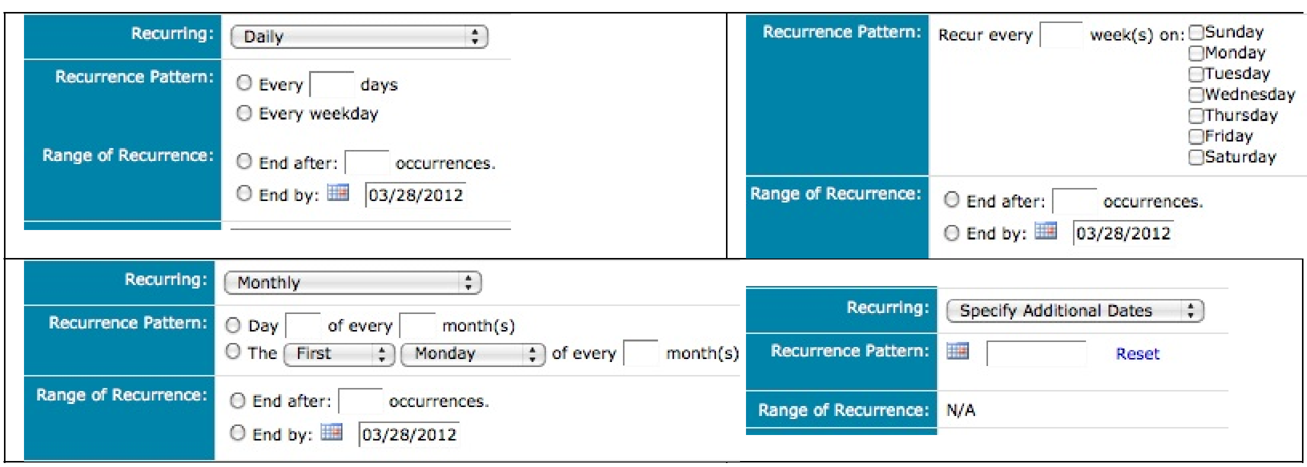
4. Enter a **Description** for the report, if desired.

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.



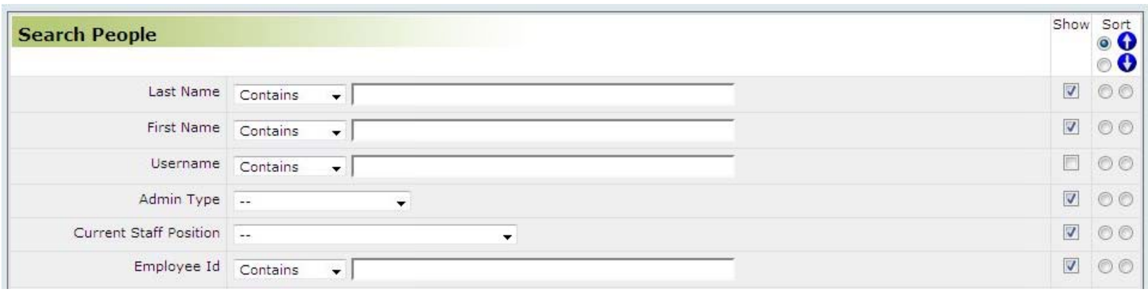
   a. Enter a title for the report being exported.
   b. Enter the date and time for the export to occur. If desired, the export can be scheduled to run on a reccurring basis. To set as a recurring export, indicate whether the exports will take place on a daily, weekly, or monthly basis. Additional, individual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



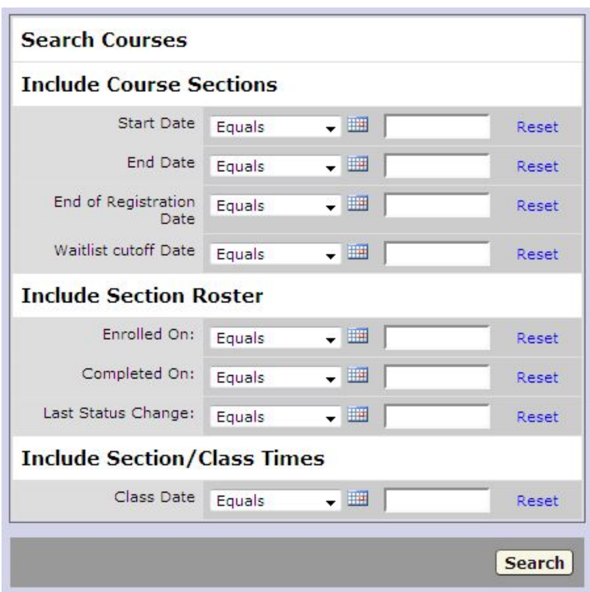
   c. Enter any email addresses to which the export should be sent.
   d. Enter information for having the report exported to an FTP server, if desired.

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.

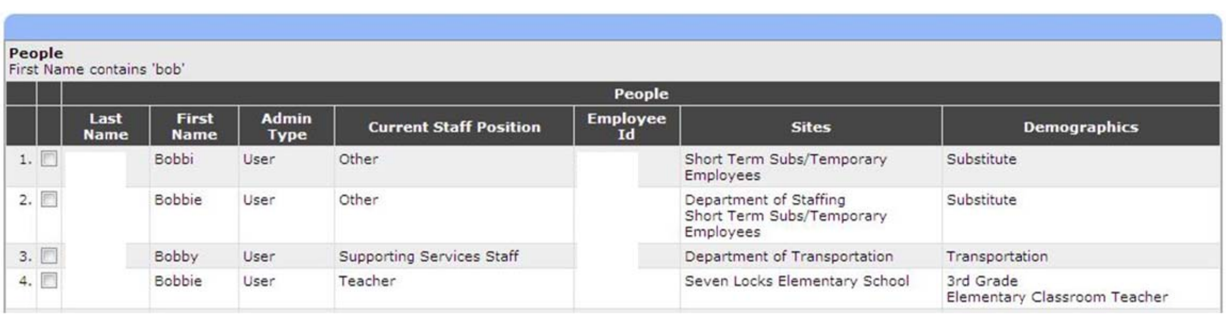
8. Drag and drop the data fields in the order desired for the columns to appear in the report.
9. Click **Save.**



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.



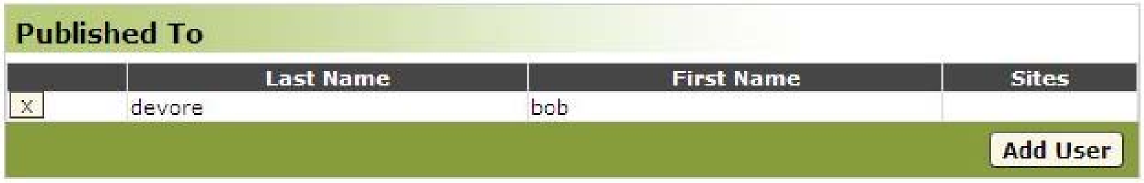
10. Specify the desired criteria and click **Search**.



People
First Name contains 'bob'

		People						
		Last Name	First Name	Admin Type	Current Staff Position	Employee Id	Sites	Demographics
1.			Bobbi	User	Other		Short Term Subs/Temporary Employees	Substitute
2.			Bobbie	User	Other		Department of Staffing Short Term Subs/Temporary Employees	Substitute
3.			Bobby	User	Supporting Services Staff		Department of Transportation	Transportation
4.			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.



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

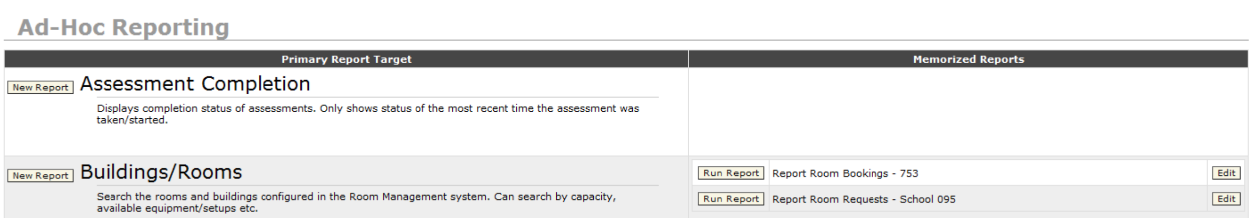
The users who have shared access to this saved report will find it listed in the My Reports channel, or wherever it has been added to their specific layout.

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.

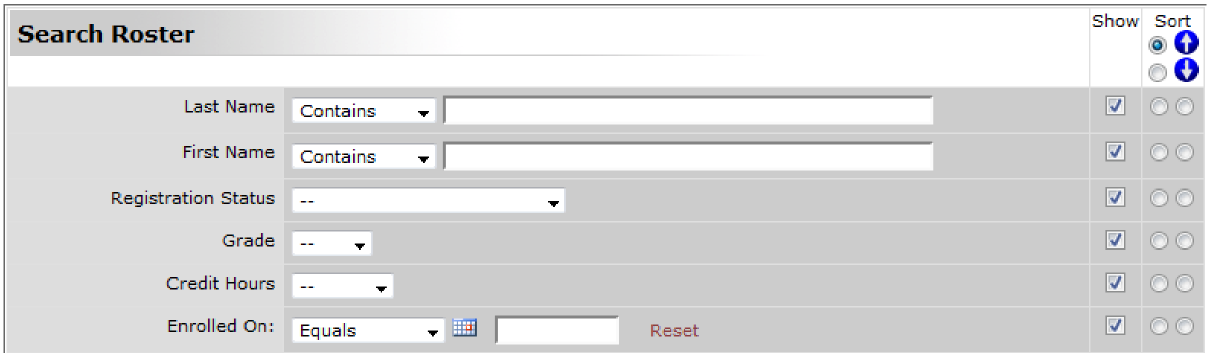
4.3 Configuring a Custom Roster Export

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.



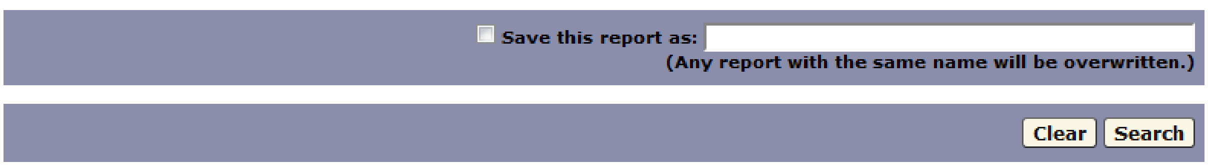
2. Locate the **Roster** section and click **New Report**.



3. *<u>Do not</u>* 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.



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**.

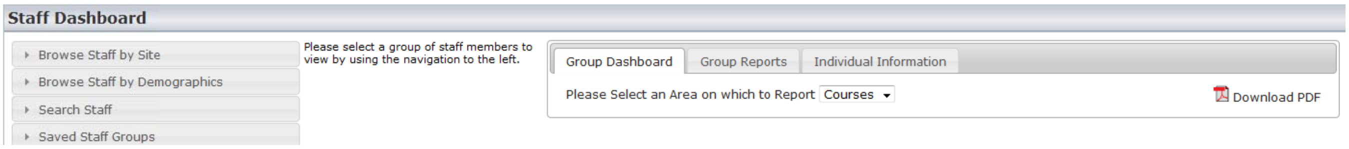
The report is now available to run on any section roster simply by clicking the **Export** button at the top of the roster and choosing the desired export report.

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.



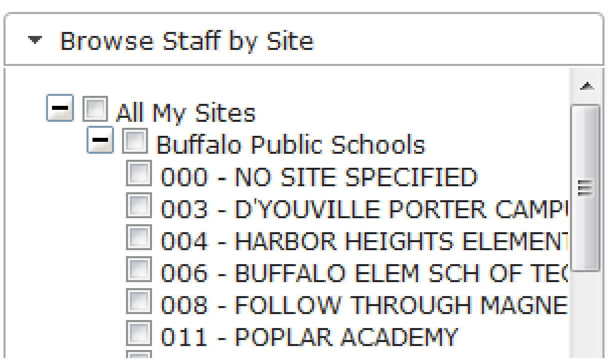
5.1 Searching for Staff and Creating Groups

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

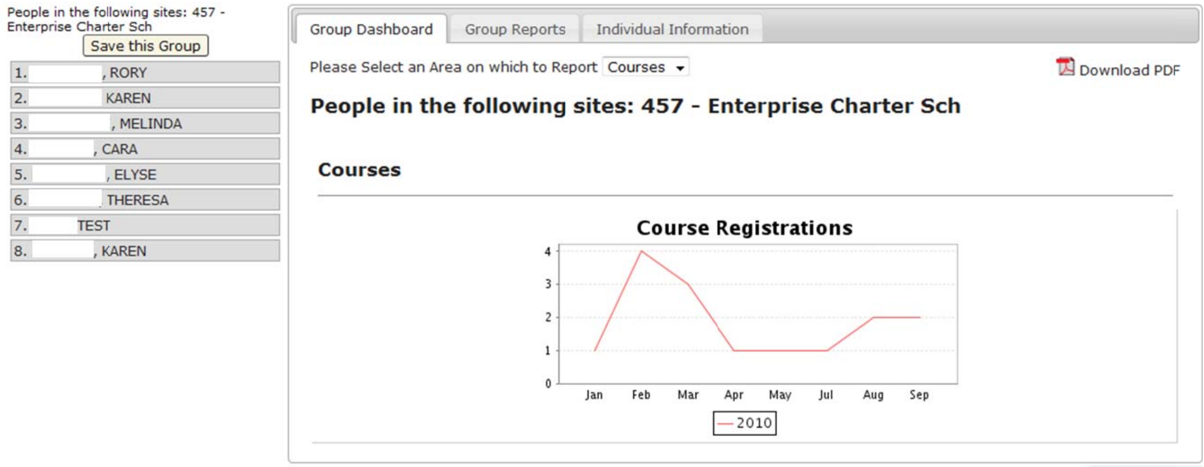
This option allows you to choose one or more sites or levels, depending on your system rights, and to work with individuals or groups of individuals from those results.

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

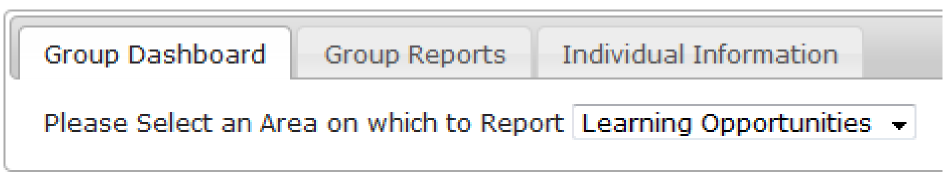


2. Use the **+** signs to locate the specific site(s) to be included.

3. Select the checkbox(es) for the desired site(s).



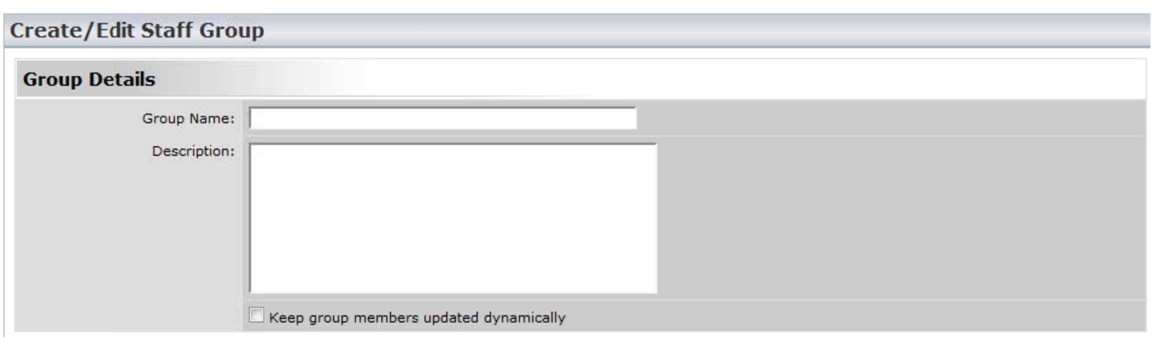
4. The list of all users at the selected site(s) will be generated and metrics will be displayed for those users as well.



5. Use the drop-down list at the top of the metrics to specify a module to report on for this group.

6. Click **Download PDF** to generate a printable copy of the selected metrics for this group.

7. Click **Save this Group** at the top of the user list to create a new custom group.



8. Enter a **Group Name** to define this new group.

9. 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.

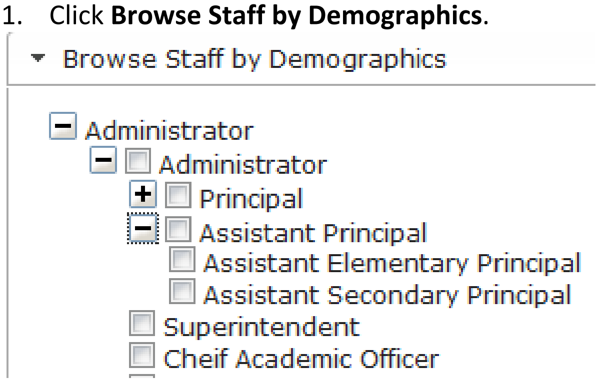
12. Add additional group members, if desired.

13. Click **Done** to complete the group and return to the main dashboard screen.

<u>Browsing for Staff by Demographics</u>

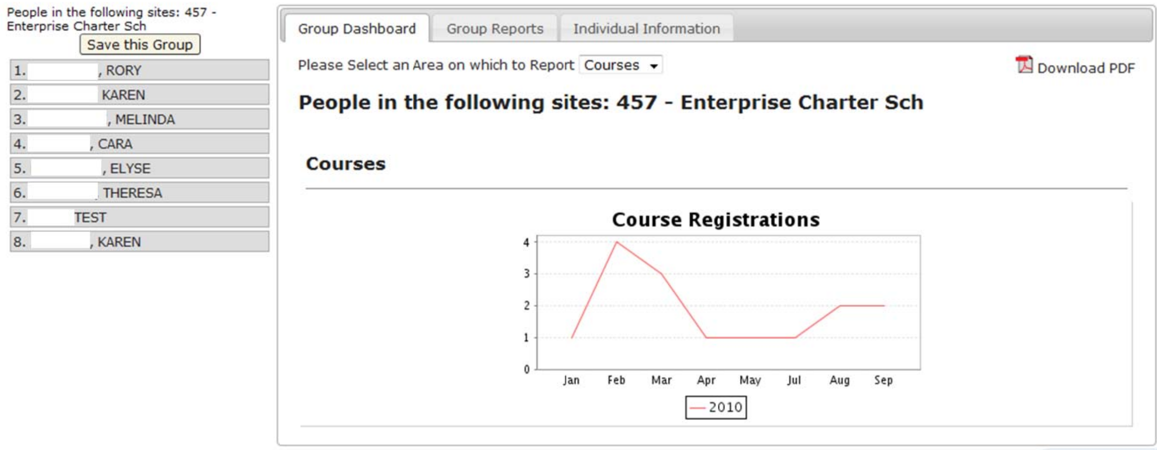
This option allows you to search for individuals by staff position or other demographic information. Groups can easily be built for users with specific demographics, such as a group for all Elementary Principals within a district.

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

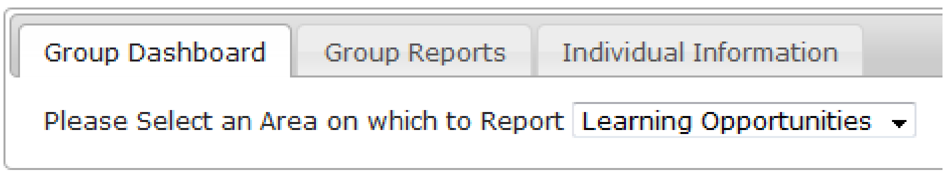


2. Use the **+** signs to locate the desired demographics.

3. Select the checkbox(es) beside the desired demographic(s) to include.

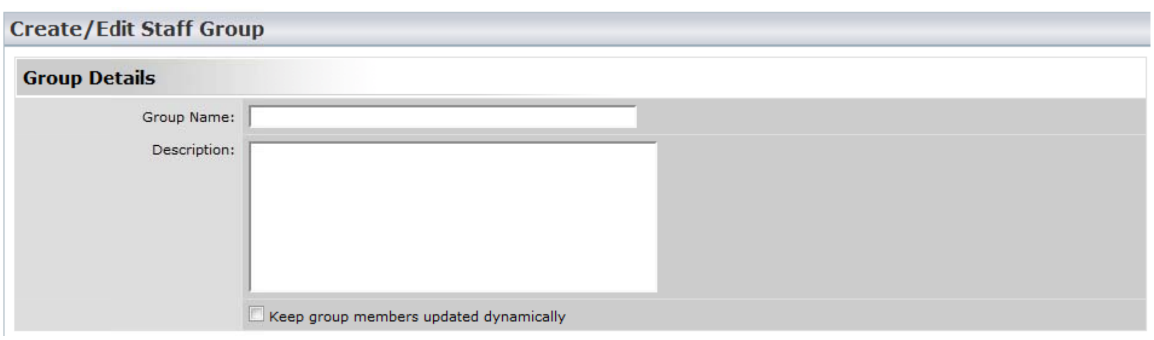


4. The list of all users at the selected site(s) will be generated and metrics will be displayed for those users as well.



5. Use the drop-down list at the top of the metrics to specify a module to report on for this group.
6. Click **Download PDF** to generate a printable copy of the selected metrics for this group.

7. Click **Save this Group** at the top of the user list to create a new custom group.



8. Enter a **Group Name** to define this new group.

9. 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.

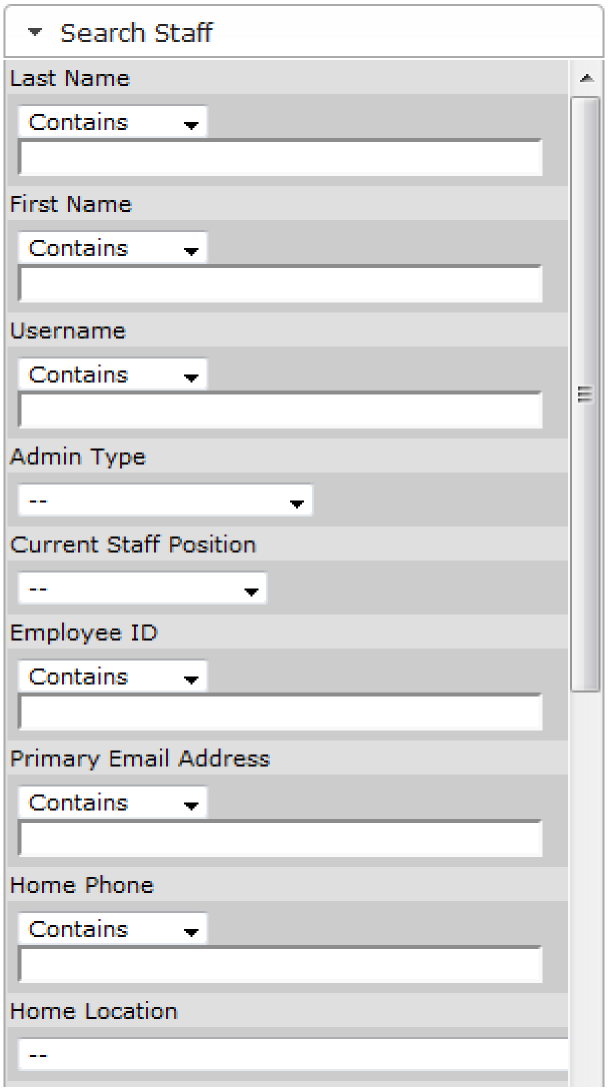
12. Add additional group members, if desired.

13. Click **Done** to complete the group and return to the main dashboard screen.

Searching for Staff by Specific Criteria

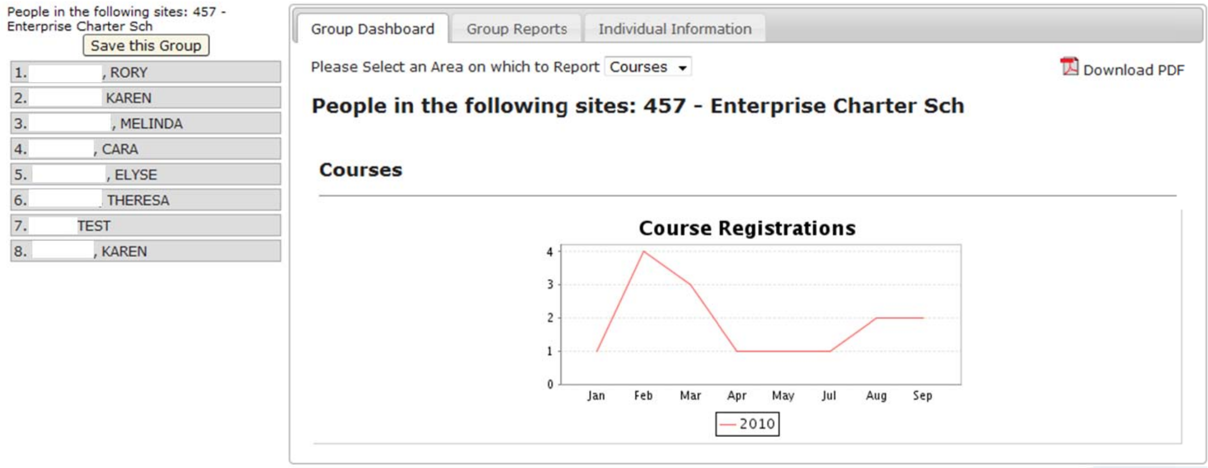
This will allow you to locate individuals based on a wide variety of search criteria, such as username, email address, date of last login, etc.

1. Click **Search Staff**.

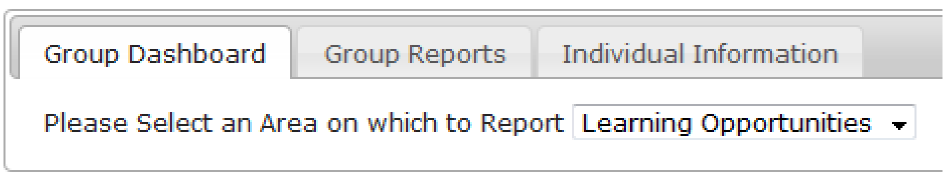


2. Use the text boxes to enter any desired search criteria, and the drop-down lists to specify how that criterion will be treated by the search engine.

3. Click **Search** at the bottom of the form to run the search.



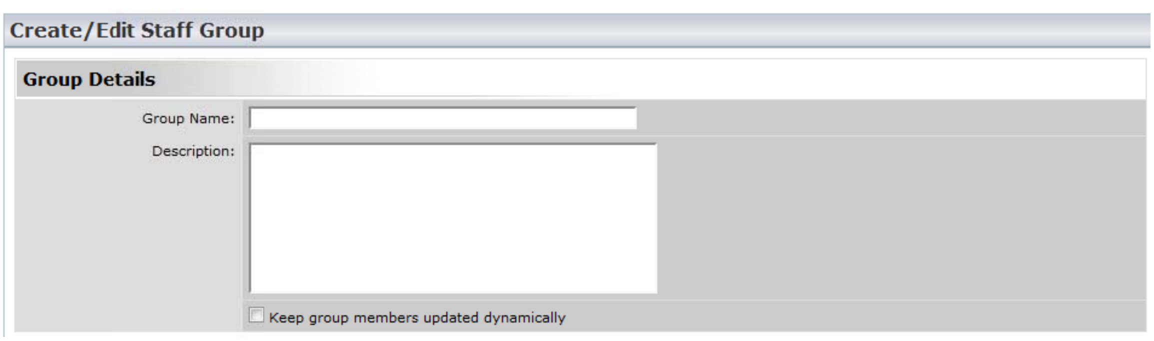
4. The list of all users at the selected site(s) will be generated and metrics will be displayed for those users as well.



5. Use the drop-down list at the top of the metrics to specify a module to report on for this group.

6. Click **Download PDF** to generate a printable copy of the selected metrics for this group.

7. Click **Save this Group** at the top of the user list to create a new custom group.



8. Enter a **Group Name** to define this new group.

9. 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.

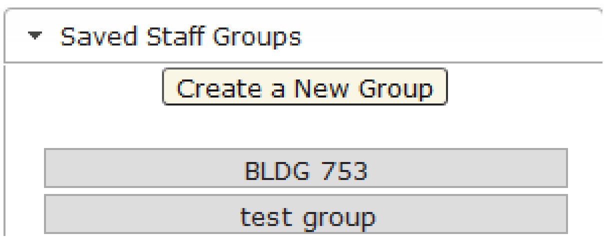
11. Click **Save** at the bottom of the page.

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**.



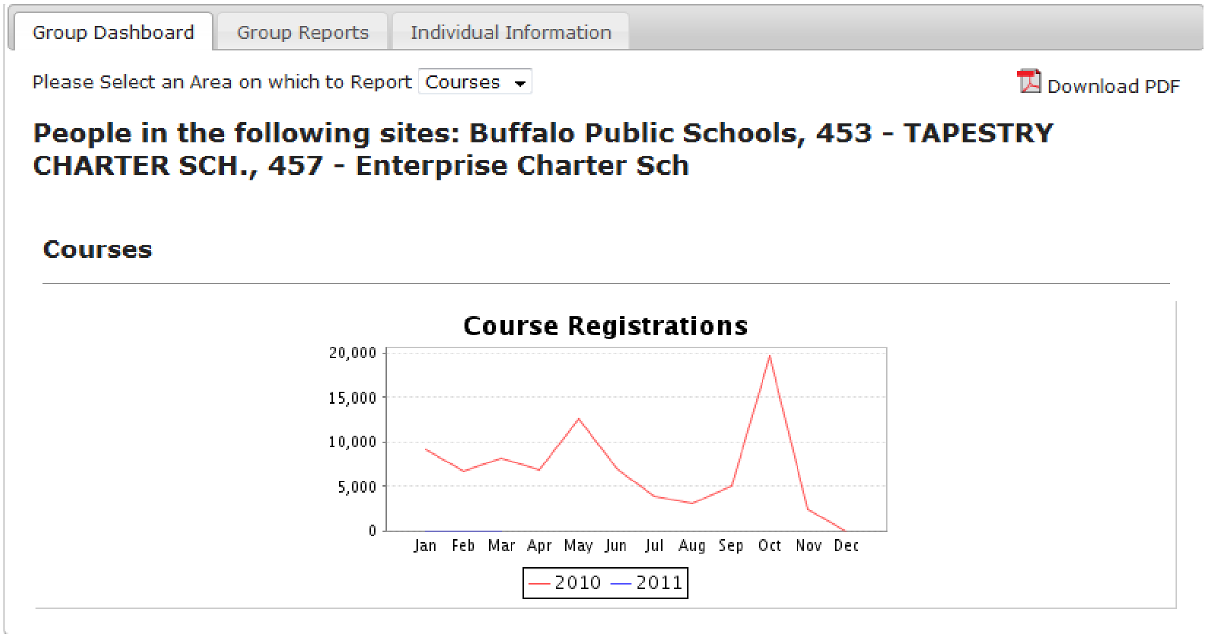
2. Click on the name of a saved group to load that group information and edit a group, if desired.

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.



3. Use the drop-down list at the top of the metrics to select the module to report on for the displayed group.

4. Click Download PDF to create a printable version of the selected metrics.

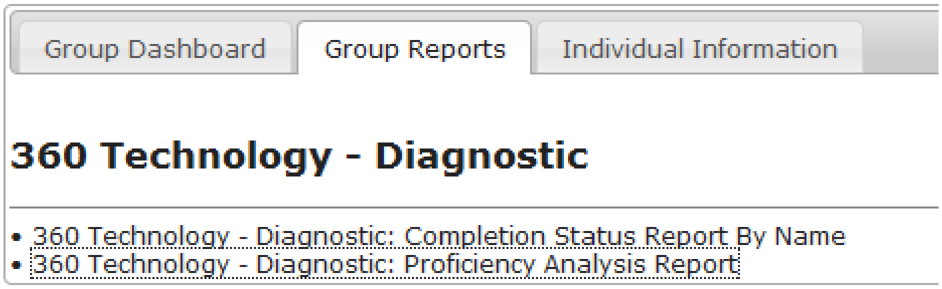
5. Click the "drill-down" icon [ ] beside any graph (that has the icon) to access the specific data from which the graph was generated.

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.

1. Select the group of users.

2. Select the **Group Reports** tab on the right side of the screen.



3. Select the desired report (Completion Status or Proficiency Analysis).

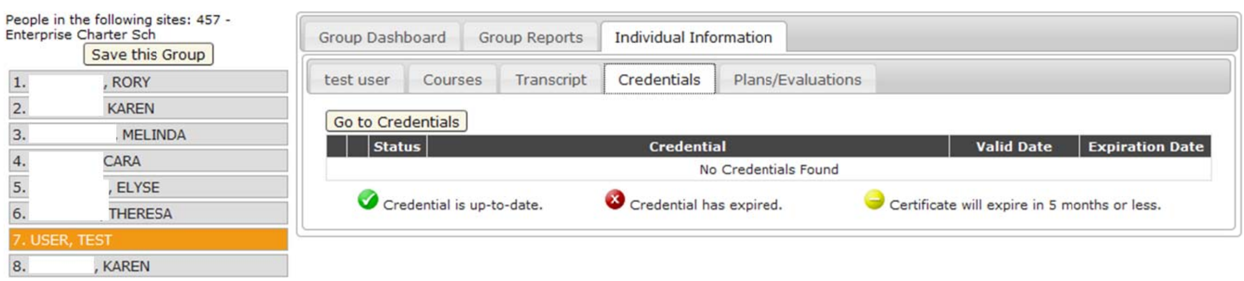
4. After viewing the results, the report can be downloaded as a PDF.

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.



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.

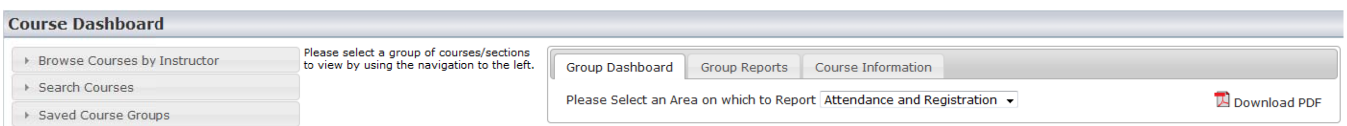
Credentials – A look at the user's credentials, showing the status and critical dates. A link allows you to access the complete transcript for this user.

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

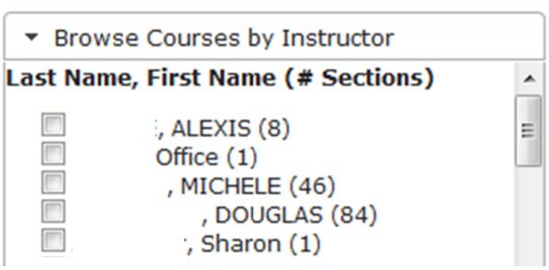
In the same way that Staff Dashboards allow you to create custom groups of users in order to report on the group, Course Dashboards allow you to create custom groups of learning opportunities and access aggregated metrics for the group, including course information, attendance and completion, and survey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

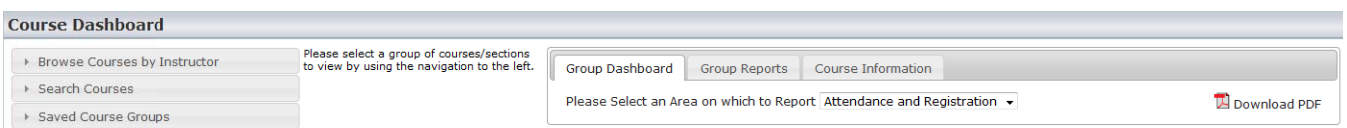
2. Select the checkbox(es) beside the instructor(s) that you want to add to the custom group.

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

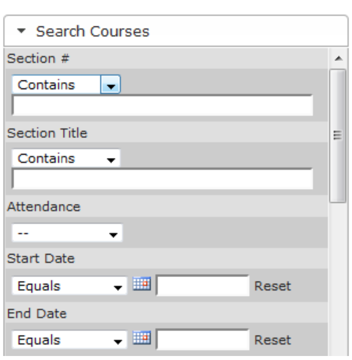
2. Complete the Group Name and Description. Indicate whether or not you want to have courses automatically added to this list if they meet the search criteria.

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

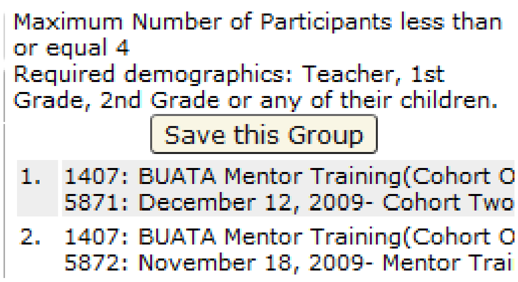


3. Click **Search Courses**.



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.



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

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

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.

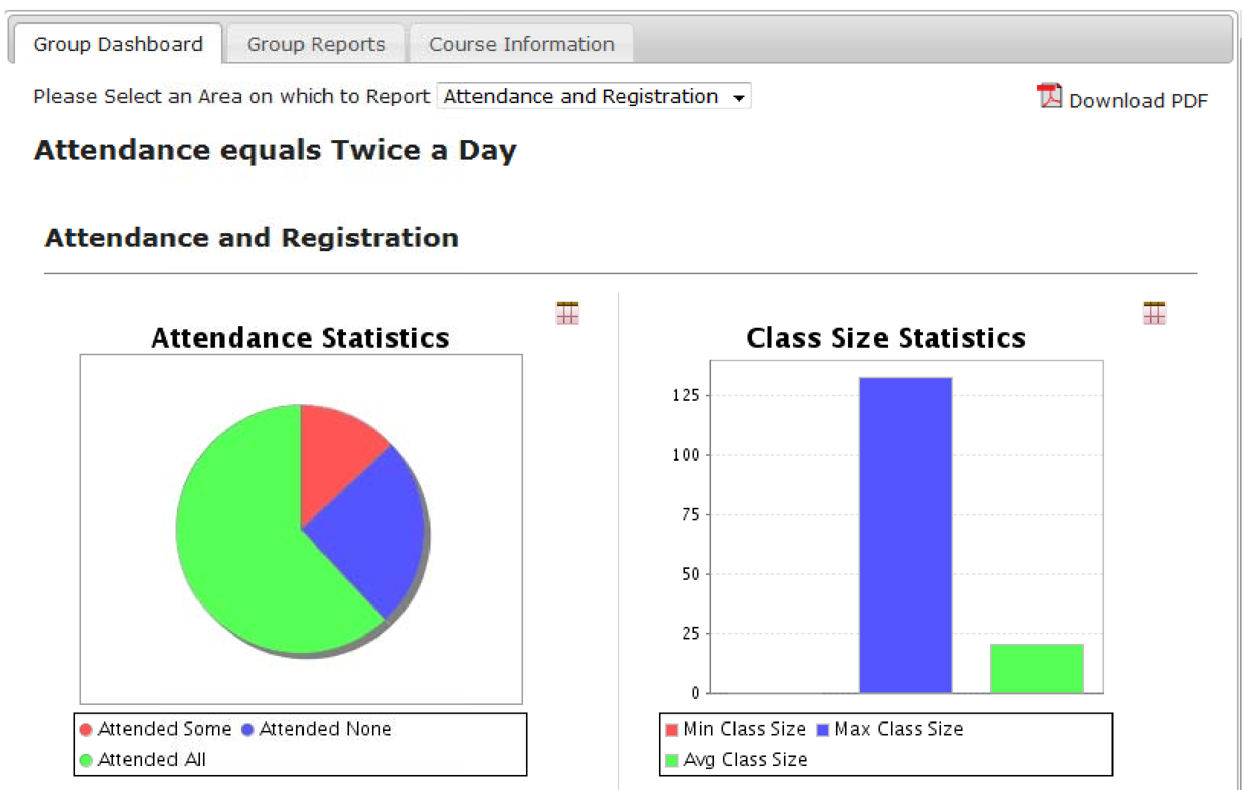
Saved groups are accessible at the bottom of the group creation options as **Saved Course Groups**.

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.

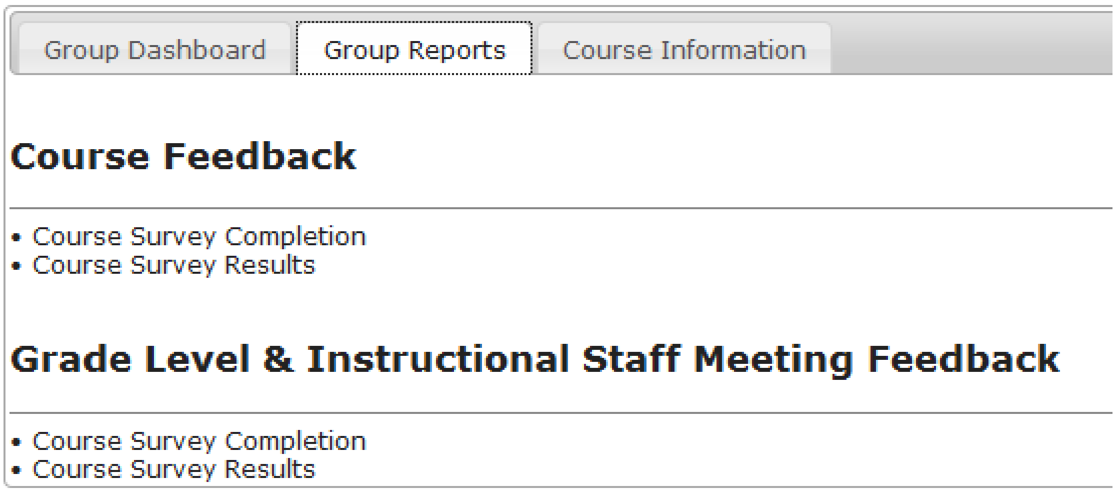
9. Click Download PDF to load a printable copy of the information shown on the screen.

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.

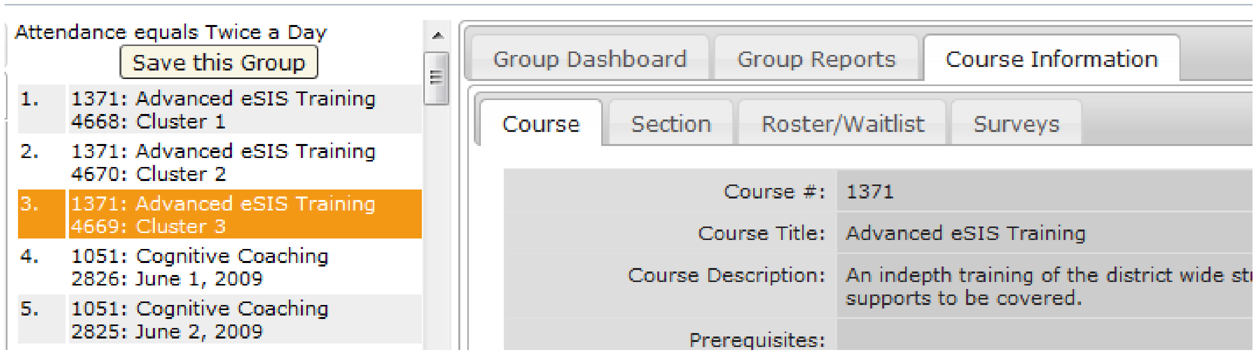


3. Select the desired report.
4. After viewing the results, you can choose to download or print them.

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.



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.