

The **Education** Edge<sup>TM</sup>

Dashboard Guide

## **102111**

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# The Education Edge Dashboard



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**Note:** Visit our website at [www.blackbaud.com](http://www.blackbaud.com) for the latest documentation and information.

*Dashboard* organizes information in your database into a “snapshot” you can easily view with the click of a mouse. Quickly and effortlessly, *Dashboard* summarizes your organization’s most valuable information.

A dashboard contains panels of summaries, lists, and graphs that efficiently compare and analyze information. You can create a variety of panels on the Dashboard page. From most panels, you can open a record in **The Education Edge** and view or edit information in the actual record.

**Warning:** The dashboards in require certain Web components installed with *Office XP* and higher to work. If you do not have *Office XP* or higher, you can access [microsoft.com](http://microsoft.com) to download the Web components from the Download Center.

The program automatically saves panels on the dashboard, and they appear until you remove or replace them with a new panel. You can edit a panel to view different information or refresh information at any time. You can print panels and, for some, view graphs or tables.

*Dashboard* is ideal for managers, business officers, executives, or other users who need to quickly access information about your organization. Because *Dashboard* does not require a complete working knowledge of **The Education Edge**, it is ideal for occasional users. You can create dashboards with panels containing information from **Registrar’s Office** and **Admissions Office** and information shared throughout **The Education Edge**.

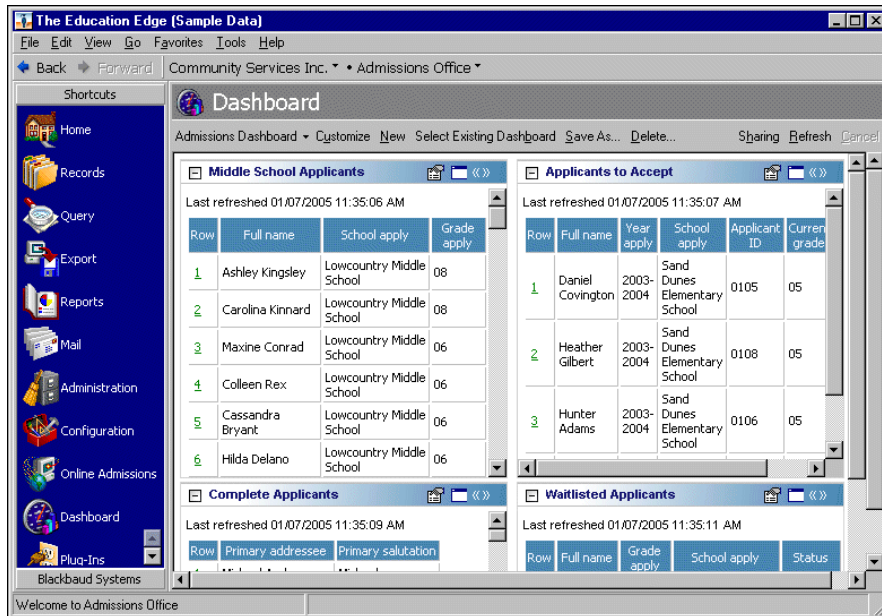
Even though you can create an unlimited number of dashboards, it is a good idea to delete those you do not need to keep the database running efficiently. Once you delete a dashboard, you cannot retrieve the information. We recommend you write down filter and output information in case you want to create the panel again in the future. You can also hide panels that you do not need currently but do not want to delete. For more information about hiding panels, see “Hiding Panels” on page 13.

The security settings you establish in *Administration* apply to *Dashboard*. If you deny a group access to all *Dashboard* options, **Dashboard** does not appear on the navigation bar for those users.

## Accessing Dashboard

**Note:** To access *Dashboard*, you must have rights established in Set up system security in *Administration*.

You access the Dashboard page by clicking **Dashboard** on the navigation bar.



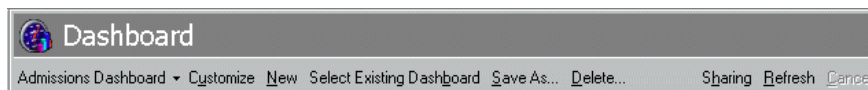
On the Dashboard page, click the down arrow on the action bar and select a dashboard. You can either customize the selected dashboard or create a new one. To customize a dashboard, click **Customize** on the action bar; to create a new one, click **New**. For more information about creating or customizing a dashboard, see “Managing Panels” on page 10.

## Working with Action Bars

Dashboards and panels have action bars with commands you can use to quickly and easily perform multiple processes, such as refreshing or deleting.

### Dashboard Page Action Bar

You can perform several tasks from the action bar on the Dashboard page. With the buttons on the action bar, you can make changes to an entire dashboard.



**[ ] Dashboard.** Click [ ] **Dashboard** to select from dashboards you have created and saved. You can select only one dashboard at a time.

**Customize.** Click **Customize** to create new panels and edit existing panels on a selected dashboard.

**New.** Click **New** to create a new dashboard.

**Select Existing Dashboard.** Click **Select Existing Dashboard** to select from a list of dashboards you have already created.

**Save As.** Click **Save As** to rename and save a dashboard as another name.

**Note:** Instead of deleting, we recommend you hide panels on a dashboard by marking the checkbox in the **Selected Panels** frame on the Customize Dashboard screen. For more information about hiding panels, see “Hiding Panels” on page 13.

**Delete.** Click **Delete** to permanently remove a selected dashboard.

**Sharing.** Click **Sharing** to share saved dashboards with other users.

**Refresh.** Click **Refresh** to update the information in the panels appearing on a selected dashboard.

**Cancel.** Click **Cancel** to stop any action on a selected dashboard.

## Dashboard Panel Action Bar

You can perform several tasks from the action bar on a dashboard panel. You can collapse, expand, copy, print, and change display characteristics of individual panels. Tooltips appear automatically when you move the cursor over the links on the action bar.



Click the **Collapse panel** button to collapse a panel so that only the action bar is visible.



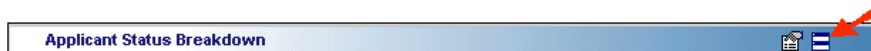
Click the **Expand panel** button to expand a panel so that its information is visible.



Click the **Panel options** button to view the properties of the panel. You can copy, refresh, print, or send the panel as an email.



Click the **Zoom panel** button to display only that panel on the dashboard.

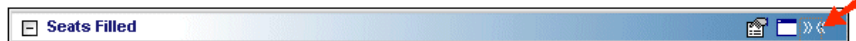


Click the **Show all panels** button to display all panels on the dashboard.



Click the **Stretch panel** button to maximize an individual panel to full screen width.





Click the **Restore panel** button to restore the panel to its original size.

## Dashboard Panels

A panel is a block of information on a dashboard that contains summary, list, and graph information you select. A dashboard contains innumerable panels based on selections you make on the Customize Dashboard screen.

With ease and flexibility, you can process panels of information in *Dashboard*. You can create dashboards in *Registrar's Office* and *Admissions Office* with panels that can serve very different purposes for different types of users.

### Admissions Office Panels

**Admissions Office** panels can track the number of seats filled by grade, compare test scores, and provide applicant demographics and status.

**Admissions Office Query.** The Admissions Office Query panel displays a panel you can customize based on a query.

**Demographics.** The Demographics panel provides a demographic breakdown of your current applicants.

**Test Score Analysis.** The Test Score Analysis panel shows comparisons of test performances by different groups.

**Applicant Status Breakdown.** The Applicant Status Breakdown panel displays historic totals for defined applicant statuses in *Admissions Office*.

**Seats Filled.** The Seats Filled panel shows seats remaining in each selected grade level for the current applications.

**Status Pipeline.** The Status Pipeline panel shows current application totals per status.

### Registrar's Office Panels

Using the *Registrar's Office* panels, you can compare test scores and display a variety of information based on queries.

**Registrar's Office Query.** The Registrar's Office Query panel displays a panel you can customize based on a query.

**Test Score Analysis.** The Test Score Analysis panel shows comparisons of test performances by different groups.

**Demographics.** The Demographics panel provides a demographic breakdown of current applicants and students.

**Recent Infractions.** The Recent Infractions panel provides details of conduct infractions during the specified date range.

### Shared Panels

Panels shared among *Education Edge* programs can provide a ranking of users based on their activity.

**Top Users.** The Top Users panel displays a ranking of users by number of records added. You can specify the record types.

**Action Reminders.** The Action Reminders panel displays a list of all actions not yet completed.

## Managing Dashboards

You can create an unlimited number of dashboards with panels you create in *Dashboard*. Saving these dashboards makes viewing information about your organization quick and easy. Once you create and save a dashboard, you can open and customize it at any time.

Select a dashboard by clicking the down arrow on the action bar on the Dashboard page. For more information about panels, see “Dashboard Panels” on page 5. From the Dashboard page, you can create, save, refresh, and delete dashboards and panels. We encourage you to try the procedures in this guide with the sample database before you create your own to use with your data.

## Adding Dashboards

To organize all the panels on a dashboard, we recommend you maintain certain panels on certain dashboards. For example, you may want to keep panels with weekly updated information on one dashboard and panels with quarterly information on another.

### ▶ Adding a dashboard

**Tip:** When you create a new dashboard, the program automatically saves your selections. However, you may find times that you need to rename and save a dashboard with another name. You can create the new dashboard by clicking **Save as** on the action bar and saving the new dashboard with a different name.

1. On the navigation bar, click **Dashboard**. The Dashboard page appears.

The screenshot shows the 'Dashboard' page in 'The Education Edge (Sample Data)' application. The dashboard is titled 'Admissions Dashboard' and includes a navigation bar with options like 'Customize', 'New', 'Select Existing Dashboard', 'Save As...', and 'Delete...'. The dashboard is divided into four panels, each displaying a table of applicant data. The 'Middle School Applicants' panel shows a list of six applicants from Lowcountry Middle School. The 'Applicants to Accept' panel shows three applicants from Sand Dunes Elementary School. The 'Complete Applicants' panel shows a table with columns for 'Row', 'Primary addressee', and 'Primary salutation'. The 'Waitlisted Applicants' panel shows a table with columns for 'Row', 'Full name', 'Grade apply', 'School apply', and 'Status'. The status of the waitlisted applicants is not visible in the screenshot.

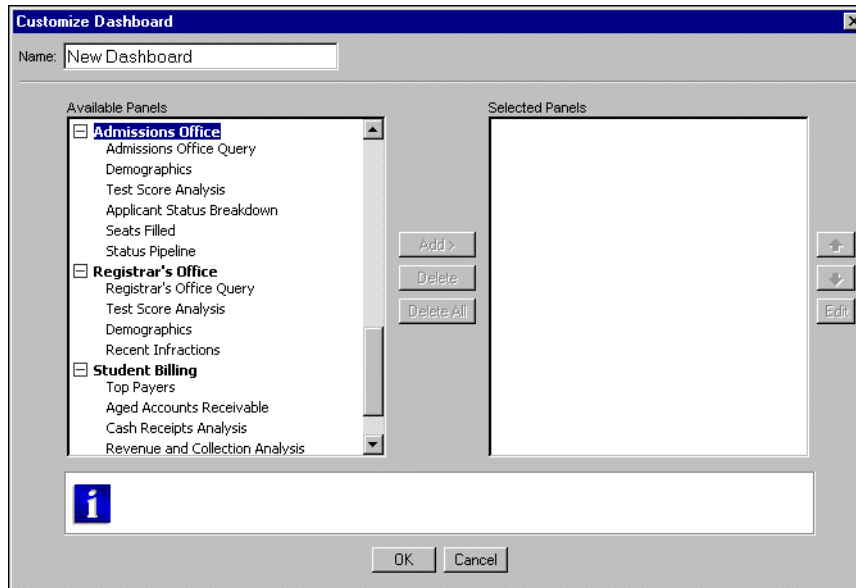
Row	Full name	School apply	Grade apply
1	Ashley Kingsley	Lowcountry Middle School	08
2	Carolina Kinnard	Lowcountry Middle School	08
3	Maxine Conrad	Lowcountry Middle School	06
4	Colleen Rex	Lowcountry Middle School	06
5	Cassandra Bryant	Lowcountry Middle School	06
6	Hilda Delano	Lowcountry Middle School	06

Row	Full name	Year apply	School apply	Applicant ID	Current grade
1	Daniel Covington	2003-2004	Sand Dunes Elementary School	0105	05
2	Heather Gilbert	2003-2004	Sand Dunes Elementary School	0108	05
3	Hunter Adams	2003-2004	Sand Dunes Elementary School	0106	05

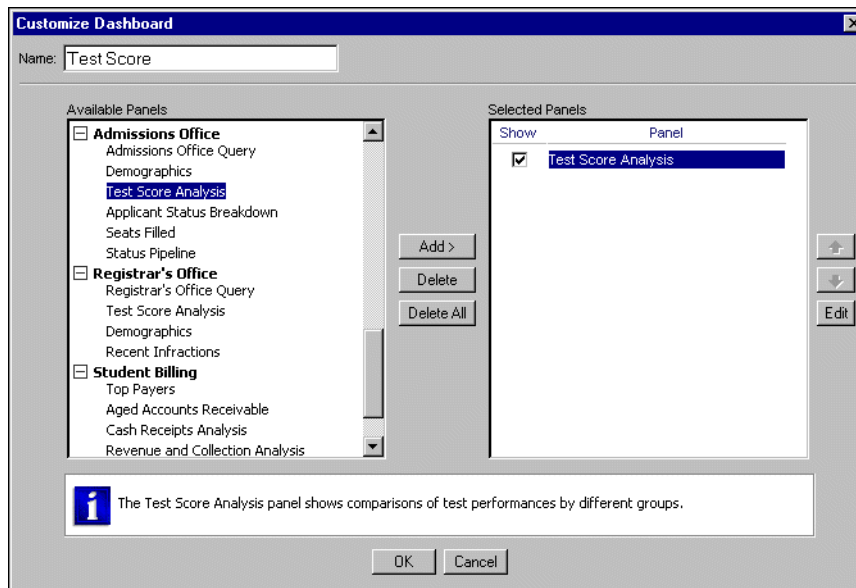
Row	Primary addressee	Primary salutation
1		
2		
3		
4		
5		
6		

Row	Full name	Grade apply	School apply	Status
1				
2				
3				
4				
5				
6				

2. On the action bar, click **New**. The Customize Dashboard screen appears.



3. In the **Name** field, enter a name for the new dashboard.



4. After you select panels for the new dashboard, click **OK**. The program saves the dashboard and you return to the Dashboard page. For more information about selecting panels for a dashboard, see “Adding Panels” on page 10.

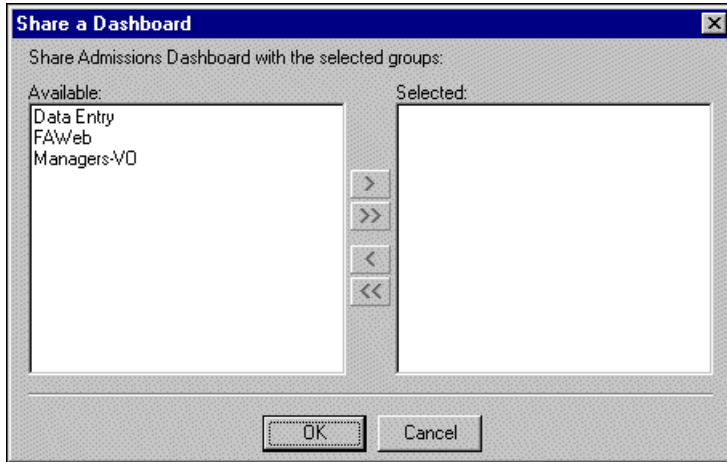
## Sharing Dashboards

You can share dashboards with users who have security rights to view dashboards.

### ► Sharing dashboards

**Note:** You cannot share dashboards with security groups that do not have rights to view dashboards. For more information about security rights, see the Security chapter of the *Administration Guide*.

1. From the dashboard toolbar, click **Sharing**. The Share a Dashboard screen appears.



2. In the **Available** box, select the security user group to share the dashboard with, and click the single right arrow to move the group to the **Selected** box. To select all groups, click the double arrow.
3. Click **OK**. You return to the dashboard.

## Refreshing Dashboards

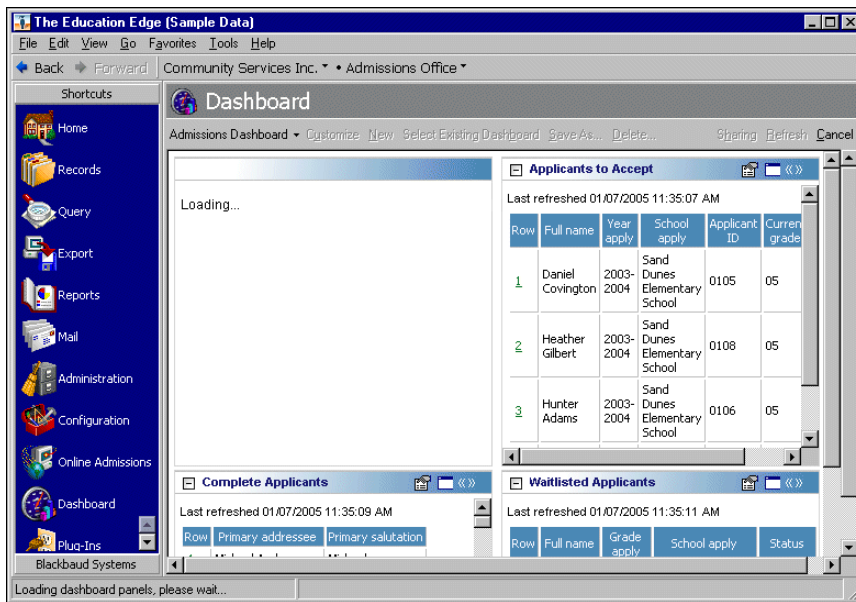
After you enter information into *The Education Edge*, it is important to refresh the dashboard so any new information is included in the panels. You can quickly refresh every panel on a dashboard at the same time from the action bar.

### ► Refreshing a dashboard

**Tip:** When the dashboard is updating information, you can navigate to other pages in *The Education Edge*. For example, you can go to the Reports page while the Dashboard page refreshes panels.

1. From a selected dashboard, click **Refresh** on the action bar. The program updates each panel on the dashboard.
2. When the program finishes refreshing the information, the dashboard reappears with updated information in the panels.

- To update an individual panel, click the **Panel options** button from a panel's action bar and select **Refresh**. For more information about action bars, see "Dashboard Panel Action Bar" on page 4.



## Editing Records from a Dashboard

From most panels, you can open a record in *The Education Edge* and edit information in the record.

### ► Editing a record from a dashboard

**Note:** You can also view a record from a dashboard panel without editing it.

- Open the Admissions Dashboard. Click the record link in the **Row** column to access records directly from dashboard panels.

- The applicant record appears.

Georgia Bishop

File Edit View Applicant Letter Favorites Tools Help

Save and Close

Medical Actions Activities Attributes Notes Media History

Bio 1 Bio 2 Applications Addresses Addressees/Salutations Relationships Checklist Financial Aid Education Tests

Georgia Bishop Edit

Nickname:

Applicant ID: 0067

Gender: Female SSN: 555-12-1175

Country: United States

Address: 2004 Nantahala Blvd.

Current grade: 07

City: Mt. Pleasant

Inquiry date: 12/15/2002

State: SC South Carolina

School apply: Lowcountry Middle School

ZIP: 29464

Contact Type	Contact Number	Link?
Home	(843) 555-1276	

Grade apply: 08 Year apply: 2005-2006

Current status: Current Student

Status date: 04/12/2005

Status reason:

Visa/Passport Demographics

Press F3 for first name 05/24/2005

- You can edit the information on any of the tabs in the record. For more information about editing records, see the records guide for each program.

**Warning:** If you edit a record from a dashboard, you must refresh the panel to include the edits. For more information about refreshing, see “Refreshing Dashboards” on page 8.

- To save changes, click **Save and Close**. You return to the Dashboard page.

## Managing Panels

You can add and edit panels on a dashboard at any time by selecting a dashboard from the Dashboard page. For more information about dashboards, see “Managing Dashboards” on page 6. We encourage you to try these procedures with the sample database before you create your own to use with your data.

**Warning:** Deleting a panel permanently removes it from the database. Be sure you have a backup of your database before you delete a panel from a dashboard. We highly recommend you hide panels you do not need instead of deleting them.

Once you understand the basics of each process, you can quickly and easily use any panel you select. The program automatically saves your selections on the Customize Dashboard screen, making future summarizing, listing, and graphing simple. Filter and output selections do not change unless you edit the panel or delete the panel from the **Selected Panels** box on the Customize Dashboard screen.

## Adding Panels

**Note:** To print panel information, click **Panel options** on the action bar and select **Print** from the submenu.

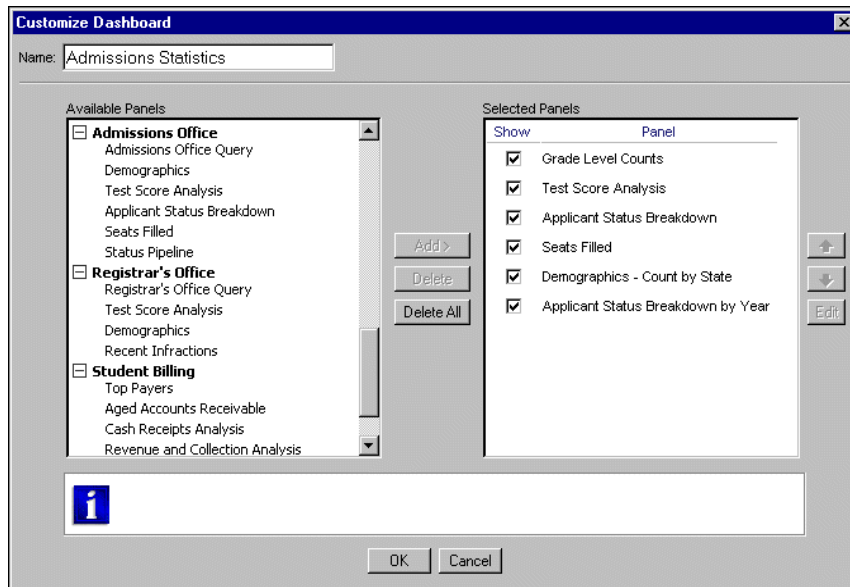
Although you can run multiple panels of the same type, you may find times when you need to edit an existing panel. To edit a panel, click **Customize** on the action bar and make your changes. When you return to the dashboard, the program saves the changes, and the edited panel displays the updated information.

### ► Adding a dashboard panel

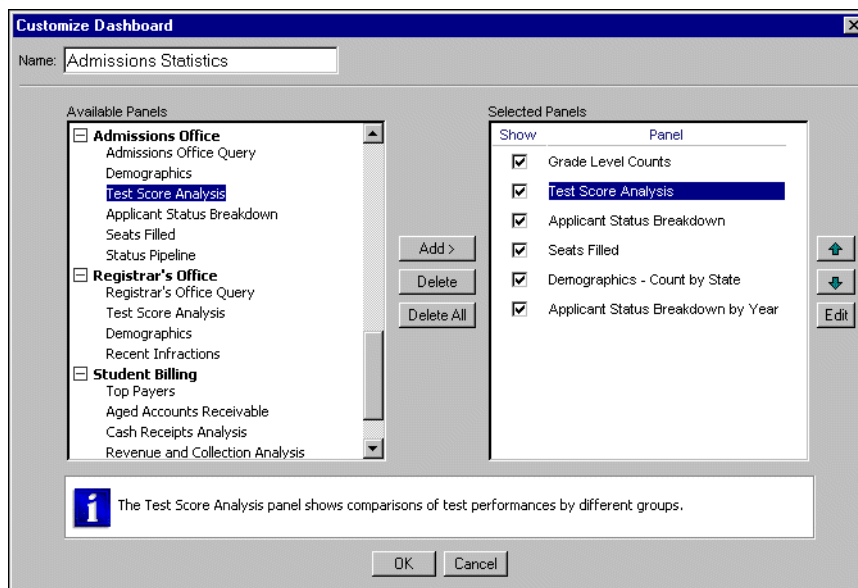
You can add numerous dashboard panels. For this procedure, we will add a Test Score Analysis panel to an existing dashboard.

**Note:** To access *Dashboard*, you must have rights established in Set up system security in *Administration*.

1. From the selected dashboard, click **Customize** on the action bar. The Customize Dashboard screen appears.



2. In the **Available Panels** box, select **Test Score Analysis** and click **Add**. **Test Score Analysis** appears in the **Selected Panels** box.



- To specify information the panel displays, select the panel and click **Edit**. The Test Score Analysis screen appears.

**Test Score Analysis**

Description:

Output:

Include tests with these dates

Test Date:

Group by:  using intervals of  between  and

Breakdown each group by:

Format

Show these columns:

Filters	Include	Selected Filters
Students	All	<All Students>
Student Current Schools	All	<All Student Current Schools>
Student Current Statuses	All	<All Student Current Statuses>
Student Attributes	All	<All Student Attributes>
Applicants	All	<All Applicants>
Applicant Schools Apply	All	<All Applicant Schools Apply>
Applicant Current Statuses	All	<All Applicant Current Statuses>
Applicant Grades Apply	All	<All Applicant Grades Apply>
Applicant Attributes	All	<All Applicant Attributes>
Current Grade Levels	All	<All Current Grade Levels>

OK Cancel

Press F7 to zoom

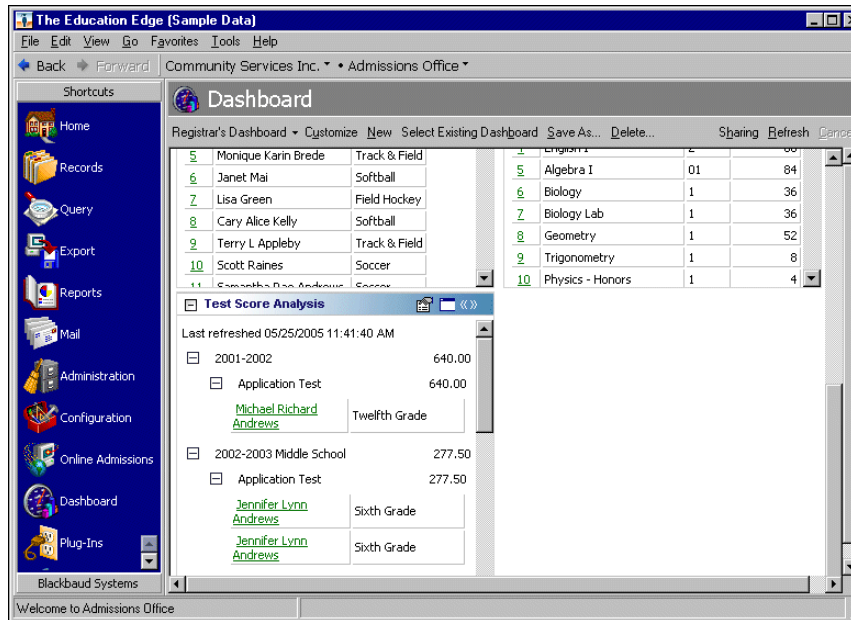
- In the **Description** field, leave the default title or enter a new title.

**Note:** You can leave the default title in the **Description** field, or you can enter your own. Customizing a panel's description makes recognizing panels easier, especially if you have multiple panels of the same type.

- In the **Output** field, to select how the information in the panel will appear, select "Table", "Graph", or "Table and Graph".
- In the **Include tests with these dates** frame, select the date or date range for the tests to include in the **Test Date** field.
- In the **Group by** field, select how to group the test scores on the panel, for example "Intervals" or "Gender".
- In the **Breakdown each group by** field, select how to organize the groupings that appear on the panel.
- Mark **Include only scores considered best scores** to include only the best test scores based on the calculation selected in the **Show best score/test equivalent information for** field on the Tests tab of applicant or student records.
- In the **Format** frame, click the binoculars and select **Student Name** and **Current Grade** as columns to appear on the panel.
- Click **OK**. You return to the Customize Dashboard screen.



12. To update the information, click **OK**. The new information appears in the new panel on the dashboard.



## Hiding Panels

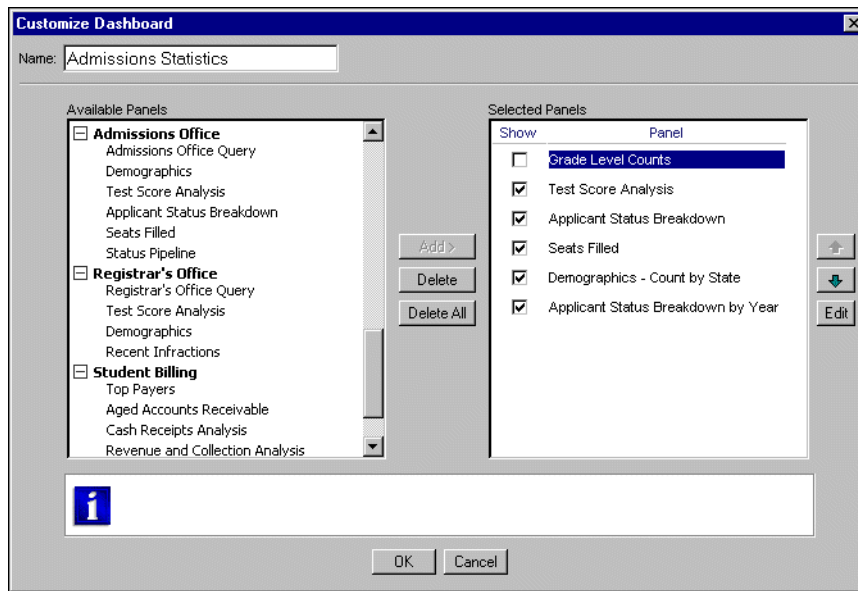
Instead of deleting a panel from a dashboard, you can use the Customize Dashboard screen to hide the panel. If you delete a panel, you must re-create the panel if you need it again. To make navigating in dashboards easier, we recommend you hide panels you do not use.

### ► Hiding a panel

**Note:** You can organize panels in the **Selected Panels** box by using the arrow buttons to move the panels up and down.

1. On the Dashboard page, click **Customize** on the action bar. The Customize Dashboard screen appears.

2. A list of panels you created appears in the **Selected Panels** box. Unmark the checkbox in the **Show** column next to the panel you want to hide.



3. Click **OK**. You return to the Dashboard page and the panel you hid is not visible.

## Graphing Panels

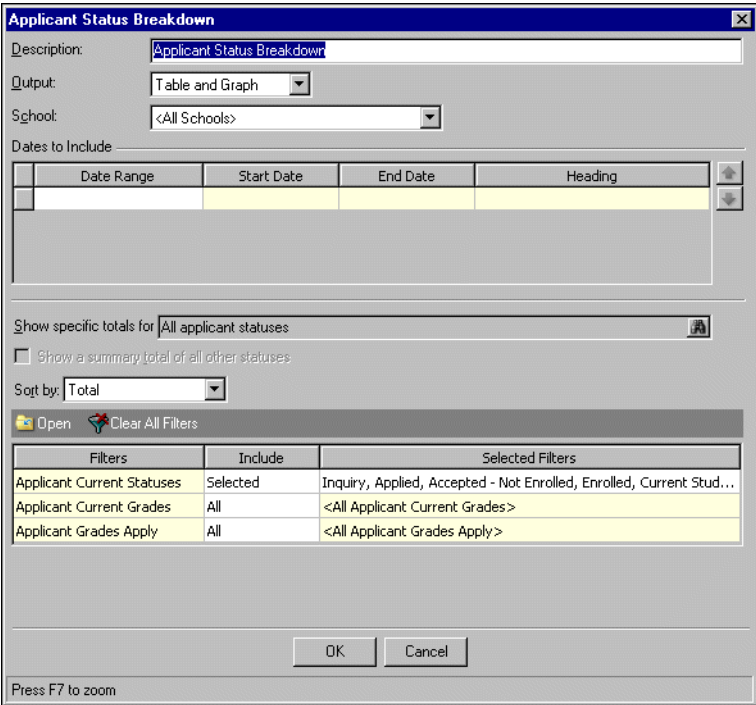
Dashboard graphs use standard graphing features, such as two- or three-dimensional bar graphs and line graphs. To access these features, on the Dashboard page, click the **Summary Graph** button on the action bar.

### ► Graphing a dashboard panel

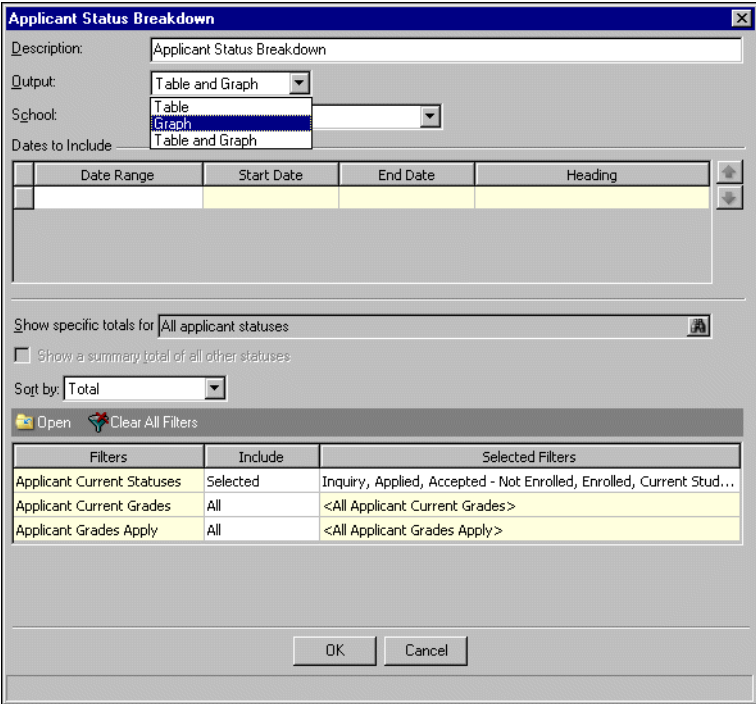
**Note:** You can organize panels in the **Selected Panels** box by using the arrow buttons to move the panels up and down.

1. From the Admissions Dashboard, click **Customize**. The Customize Dashboard screen appears.

- 2. In the **Selected Panels** box, select **Applicant Status Breakdown** and click **Edit**. The Applicant Status Breakdown screen appears.



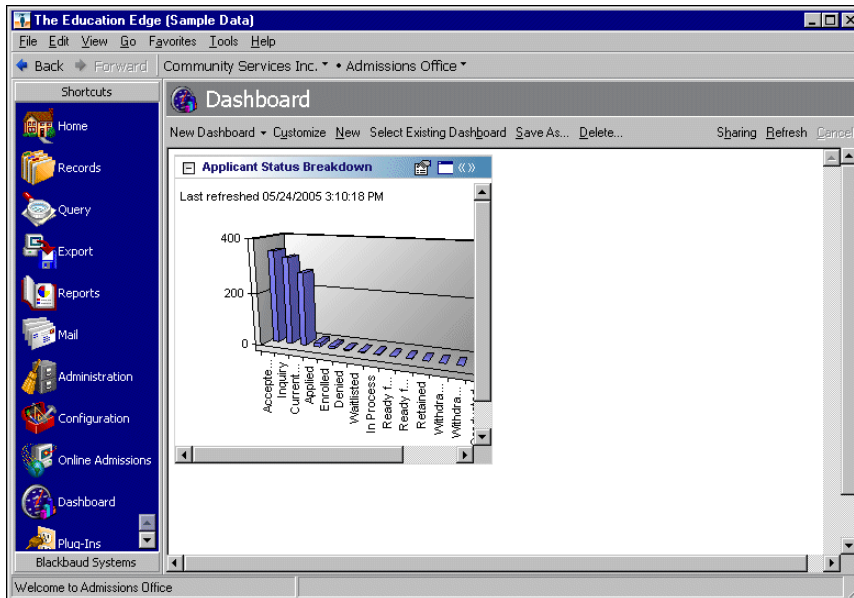
- 3. In the **Output** field, select “Graph”, “Table” or “Table and Graph”.



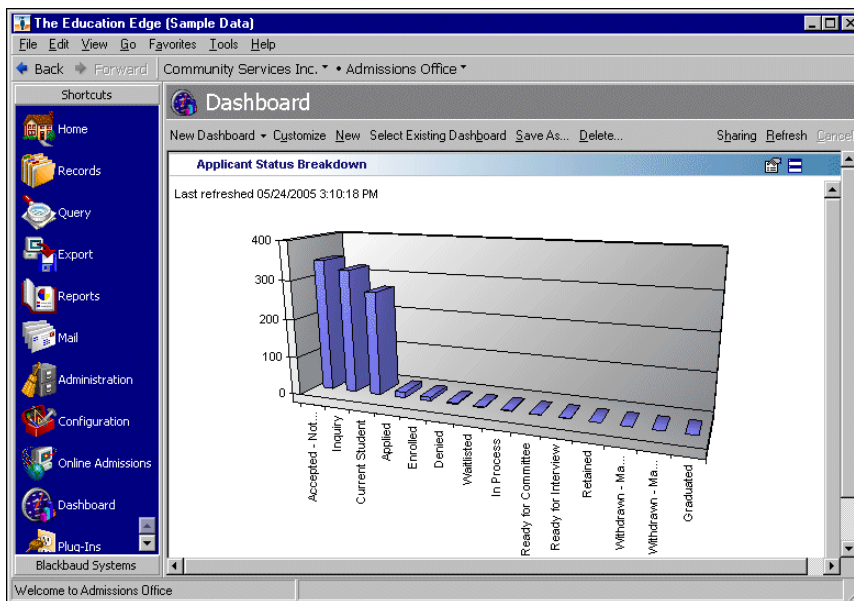
- 4. Click **OK**. You return to the Customize Dashboard screen.

**Note:** To print the graph, click **Panel options** on the action bar and select **Print** from the submenu. For more information about action bars on dashboard panels, see “Dashboard Panel Action Bar” on page 4. For more information about printing panels, see “Printing a panel” on page 18.

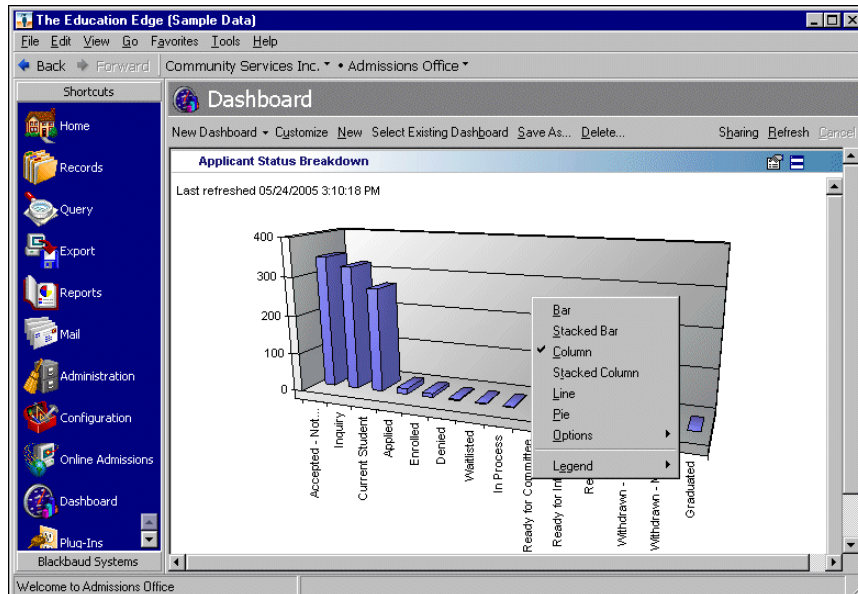
- Click **OK**. You return to the dashboard, and a graph of the information appears in the Applicant Status Breakdown panel.



- To customize the graph, click the **Zoom panel** button to display only that panel on the dashboard.



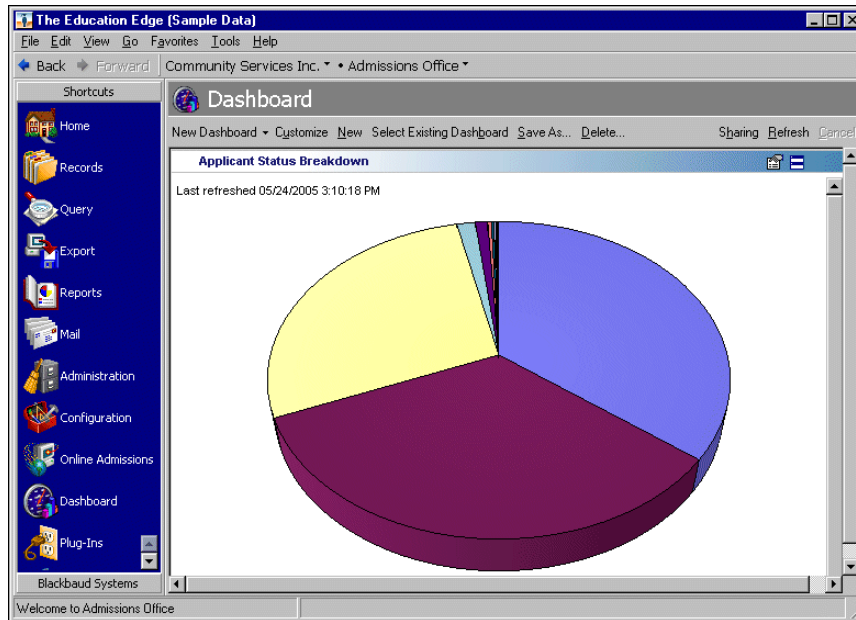
7. To change the type of graph that appears, right-click the graph.



From the submenu, you can select:

- **Bar** — displays the information in the panel as a horizontal bar graph
- **Stacked Bar** — displays multiple sets of information as one horizontal bar in the graph
- **Column** — displays the information in the panel as a vertical bar graph
- **Stacked Column** — displays multiple sets of information as one vertical bar in the graph
- **Line** — displays the information as a line graph
- **Pie** — displays the information as a pie chart
- **Options** — defines the category, value, and appearance of the axes on the graph or displays a three-dimensional graph
- **Legends** — places the legend where you want it to appear on the panel or hides the legend if you do not want it displayed

Once you make your selection, the graph appears in the panel as you selected.



## Printing Panels

From a selected panel, you can print the grid or a graph of the information displayed in the panel. For more information about setting up printers in *The Education Edge*, see the *Program Basics Guide*.

### ▶ Printing a panel

1. From a selected dashboard panel, click the **Panel options** button on the action bar. For more information about action bars, see "Dashboard Panel Action Bar" on page 4.

The screenshot shows the same software interface as the previous image, but with a different dashboard panel selected. The dashboard title is "Admissions Dashboard" and it includes options for "Customize", "New", "Select Existing Dashboard", "Save As...", and "Delete...". The primary panel is titled "Middle School Applicants" and shows a table of applicant data. A context menu is open over the table, displaying options: "Properties", "Copy Graph to Clipboard", "Copy Table to Clipboard", "Refresh", "Print...", and "Send as E-mail". The table has columns for "Row", "Full name", "School apply", "Year apply", "School apply", "Applicant ID", and "Current grade". The status bar at the bottom reads "Welcome to Admissions Office".

Row	Full name	School apply	Year apply	School apply	Applicant ID	Current grade
1	Georgia Bishop	Lowcountry Middle School	2003-2004	Sand Dunes Elementary School	0105	05
2	Nicole Gilmore	Lowcountry Middle School	2003-2004	Sand Dunes Elementary School	0108	05
3	Pauline Snider	Lowcountry Middle School	2003-2004	Sand Dunes Elementary School	0106	05
4	Brenda Spencer	Lowcountry Middle School	2003-2004	Sand Dunes Elementary School		
5	Cassandra Poppas	Lowcountry Middle School	08			
6	Amanda Gates	Lowcountry Middle School	08			

2. From the submenu, select **Print**. The Print screen appears so you can select a printer and make printing selections. For more information about setting up printers in *The Education Edge*, see the *Program Basics Guide*.

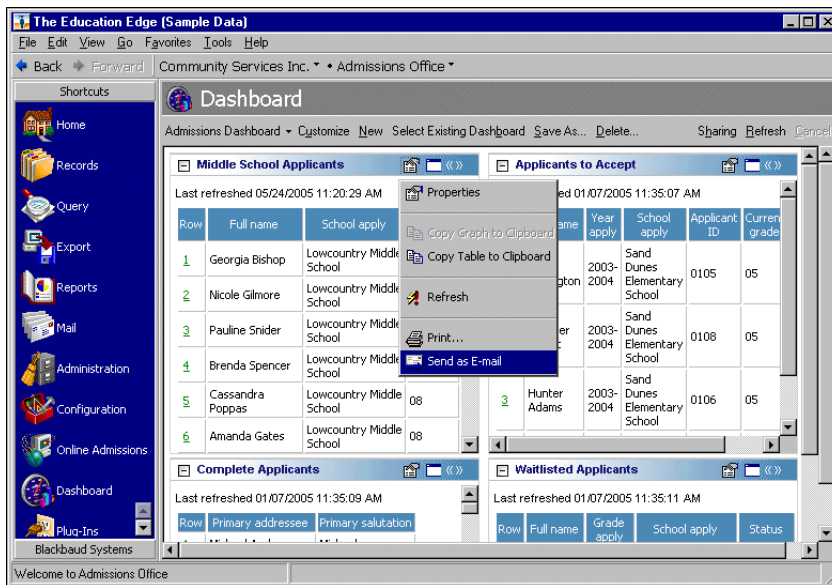
3. Click **Print**. The panel prints on the printer you selected and you return to the Dashboard page.

## Sending Panels as Email

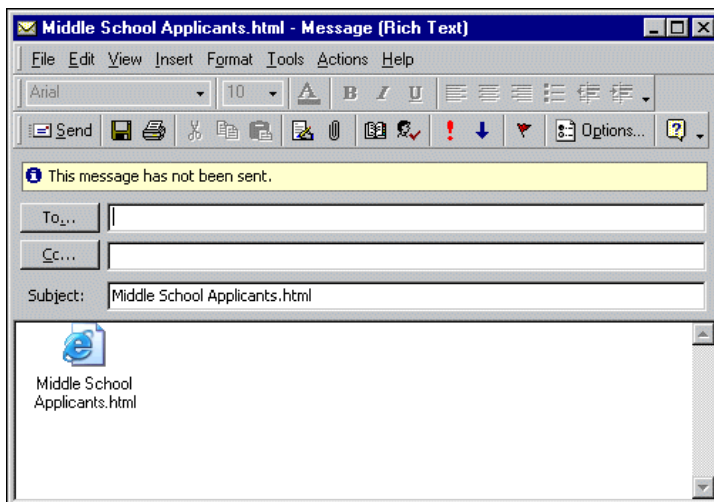
You can send a panel as email directly from the Dashboard page. *The Education Edge* is compliant only with MAPI email software, such as Microsoft *Outlook*.

### ▶ Sending a panel as email

1. From a selected panel, click the **Panel options** button on the action bar. For more information about the action bar, see “Dashboard Panel Action Bar” on page 4.



2. From the submenu, select **Send as E-mail**. An email screen appears.



**Warning:** *The Education Edge* is compliant only with MAPI email software, such as Microsoft *Outlook*.

3. In the **To** field, enter an email address.
4. In the **Subject** field, enter a subject for the email.

5. Click **Send**. The program sends the selected panel as an attachment to the message, and you return to the Dashboard page.



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