Blackbaud

Student Information System™

Dashboard Guide
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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 Blackbaud Student Information System and view or edit information in the actual record.

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 Blackbaud Student Information System, 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 Blackbaud Student Information System.

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 12.

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.
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.

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.

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 12.
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 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.

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 Blackbaud Student Information System 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 4. 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.
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.

![Share a Dashboard](image)

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.

**Refresh Dashboards**

After you enter information into **Blackbaud Student Information System**, 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 **Blackbaud Student Information System**. 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.
3. 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 Blackbaud Student Information System 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.

1. Open the Registrar’s Office Query Dashboard. Click the record link in the Row column to access records directly from dashboard panels.
2. The student record appears.

3. 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.

4. 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 5. 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.

  ![Customize Dashboard Screen](image)

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

  ![Selected Panels](image)
3. To specify information the panel displays, select the panel and click **Edit**. The Test Score Analysis screen appears.

4. 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.

5. In the **Output** field, to select how the information in the panel will appear, select “Table”, “Graph”, or “Table and Graph”.

6. In the **Include tests with these dates** frame, select the date or date range for the tests to include in the **Test Date** field.

7. In the **Group by** field, select how to group the test scores on the panel, for example “Intervals” or “Gender”.

8. In the **Breakdown each group by** field, select how to organize the groupings that appear on the panel.

9. 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.

10. In the **Format** frame, click the binoculars and select **Student Name** and **Current Grade** as columns to appear on the panel.

11. 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.

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 17.
5. Click OK. You return to the dashboard, and a graph of the information appears in the Applicant Status Breakdown panel.

6. 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 *Blackbaud Student Information System*, 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.

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 *Blackbaud Student Information System*, 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. *Blackbaud Student Information System* 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:** *Blackbaud Student Information System* 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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