SchoolTool Premier Dashboard Suite Guide

SCHOOLTOOL PREMIER DASHBOARDS

Dashboard
▷ Assessments
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▷ Attendance
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Working with Dashboards

The SchoolTool dashboards provide users with an alternate way to view data and analyze trends. Each dashboard includes a unique selection of data and corresponding presentation tools such as graphs, charts, and tables that can be manipulated in a variety of ways. Once familiar with the following key elements and features, users should be able to quickly navigate through any dashboard and easily obtain the desired information. There are 2 ways to access the dashboards.
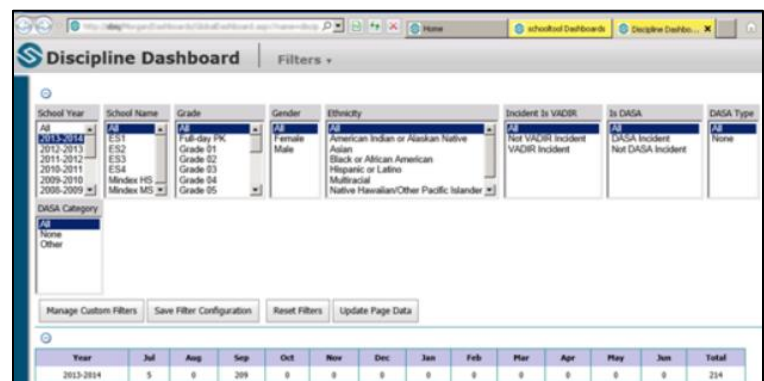
Accessing Dashboards from SchoolTool Application

Home > Dashboards
Districts using SchoolTool Premier can now access dashboards directly from within SchoolTool in this area. Once the district has configured the connection to the Dashboard Suite, a list of available dashboards will appear here.

When accessing Dashboards from this area, all dashboards will respect users' building rights as defined in SchoolTool. In some situations, however, a user might have a separate account already defined from within the Dashboard Suite. When that is the case, user account settings in the Dashboard Suite, including building and field-level access, will be respected regardless of the user's building rights in SchoolTool.
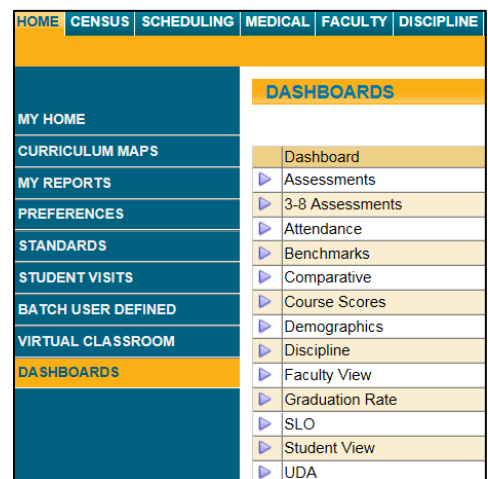
To access a dashboard, simply click on the Select ▷ button for the appropriate dashboard. The dashboard will open in a new window.

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Accessing Dashboards from SchoolTool IQ Dashboards Site

1. Open an internet browser, navigate to your SchoolTool Dashboards site and log in.
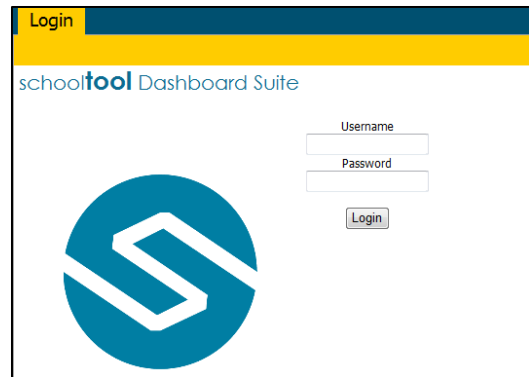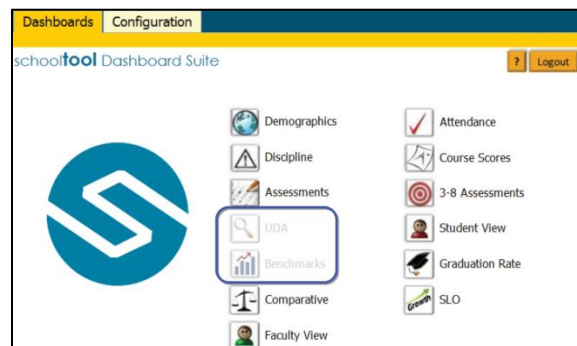
    The Dashboards tab will be displayed by default after logging in.

2. Click on the dashboard that pertains to the type of information you want to analyze. The selected dashboard will open in a new browser window or tab.

    If a dashboard is shown on the screen but is "grayed out" and disabled, this means that no data is available for that specific dashboard.

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Navigating Between Dashboards

Each dashboard (and subsequent charts and results lists) contains a top menu bar that includes the current location, a Dashboards "Jump To" menu, a Filters menu and a Student ID Filter indicator.

To switch to a different dashboard, simply click the Dashboards menu and select the dashboard to view.

To manage saved filters, click the Filters menu and select the appropriate operation you wish to perform (see the section on Filters in this help for more details on saving filters).

To remove an active Student ID filter, click Clear. This will deactivate the student filter for all dashboards during that session.
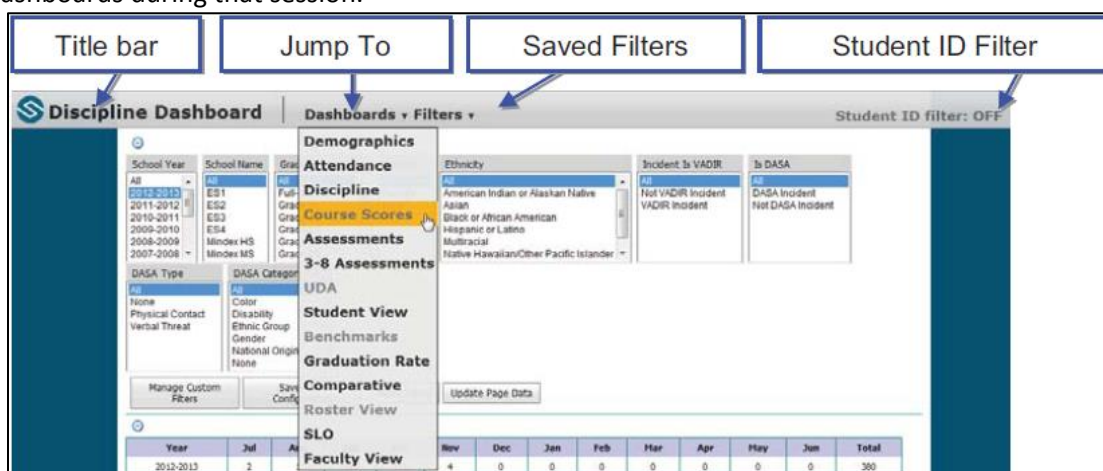
Filters

Each dashboard contains a filter section at the top of the screen. Default filters are dependent on the data presented by each individual dashboard, but function identically across all dashboards.

To apply filters, select the appropriate criteria and click the Update Page Data button to refresh the page.

To filter on additional fields, click the Manage Custom Filters button. Refer to the Customizing Filters section below for details.

To revert to the default filter fields and values for the current filter configuration, click the Reset Filters button. If you are using a saved filter configuration, this button will reset the fields and values for that configuration.

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To save changes to your filter configuration, click the Save Filter Configuration button. If you are using a saved filter configuration, this will update that configuration using the selected fields and values. If no saved filter configurations have been defined, you will be prompted to enter a name for the new configuration prior to saving.

Customizing Filters

In addition to the basic filters that are pre-defined for each dashboard, users can select additional filter criteria from an extensive list of fields.
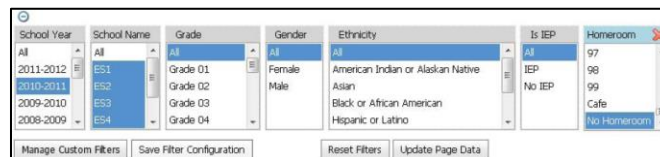
To add fields, click the Manage Custom Filters button in the lower right portion of the Filters section. The Add Filter Field dialog box will open, which contains a list of all fields available for that dashboard.
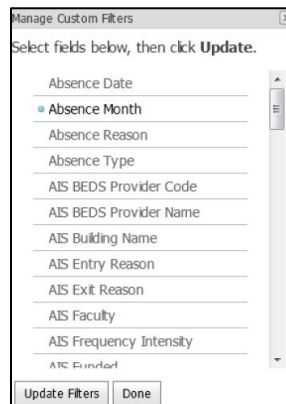
Select one or more fields to add by clicking the field name and click the Update Filters button to add those fields. A message will appear while the filter is loaded.


Once the "Loading" indicator disappears, repeat the above steps to add other fields or click the Done button to return to the dashboard. Any user-defined filter fields will be available and will have blue-shaded title bars. To remove a user-defined field, simply click the Remove ✖ button for that field.

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Saving Filters

Filter configurations can be saved on a per-user basis and can be loaded on any dashboard. To save filters, simply select the desired filter fields and criteria and click the Save Filter Configuration button.

Note: If you are using a saved filter configuration, this will update that configuration using the selected fields. If no saved filter configurations have been defined, you will be prompted to enter a name for the new configuration prior to saving.
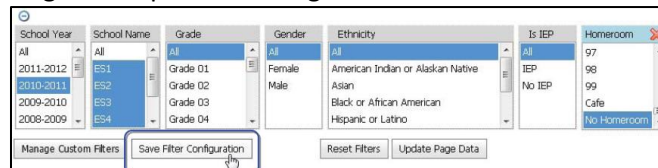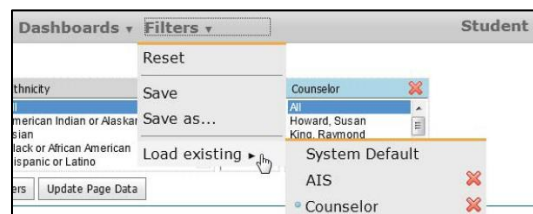

Click OK in the message box that appears to confirm this action and save the filter configuration. Once this has been saved, that dashboard will retain the filter configuration any time the user loads that dashboard.

Using the Filters Menu

Users can save any number of filter configurations for later use. These filters are available on a per-user basis and can be loaded on any dashboard to which that user has access. To save a filter configuration, click the Filters menu and select an operation:

- Reset: Clicking this option will reset the filter fields and values to the selected configuration (or the system default, if no saved configuration is currently selected).
- Save: Clicking this option will update the currently selected filter configuration. If no saved filter configurations have been defined, you will be prompted to enter a name for the new configuration prior to saving.
- Save as…: Clicking this option will allow you to save a new filter configuration based on the fields currently selected. You will be prompted to enter a configuration name prior to saving.
- Load existing: Clicking this option will allow you to load any saved filter configuration for that dashboard, including the system default. A small blue circle will indicate the currently active configuration. To delete a filter configuration, use the "Load existing" option and click the Delete icon next to the configuration to be removed.

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Hiding/Expanding Sections

Each section of a dashboard can be hidden or expanded as needed to accommodate real estate on the screen.

- Click the Hide ⊖ button to minimize a visible section.
- Click the Expand ⊘ button to expand a hidden section.

If a section has no data available for the selected filters, the section will be minimized by default.

Year	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2008-2009	836	841	837	843	834	832	822	820	819	813	810	811
2007-2008	871	869	861	862	845	842	837	833	831	824	825	823
2006-2007	866	865	864	851	849	838	834	830	827	823	826	829

Working with Charts

Dashboards contain a number of interactive charts, including bar graphs, line graphs, pie charts, or tables. Each of these charts functions differently depending on the information presented. In general, most charts allow users to adjust the chart type and color palette, adjust the chart breakdown, export, and view additional information about specific data points. All interactive charts contain two (2) tabs: a Data tab (shown by default) and a Configuration tab.
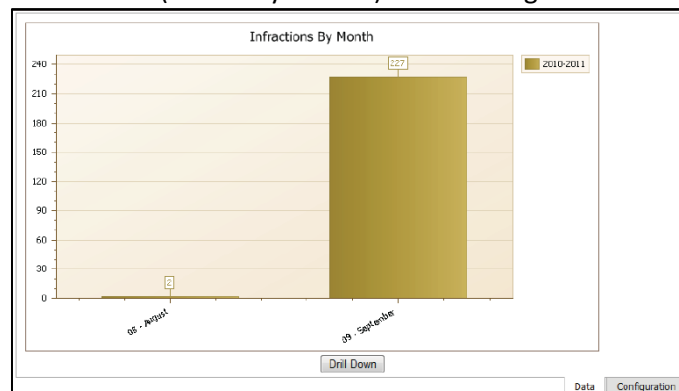
Data Tab

The Data tab is the main chart presentation area, and by default includes data matching the selected filter criteria. Hovering the mouse over any data point will display additional information about that point.

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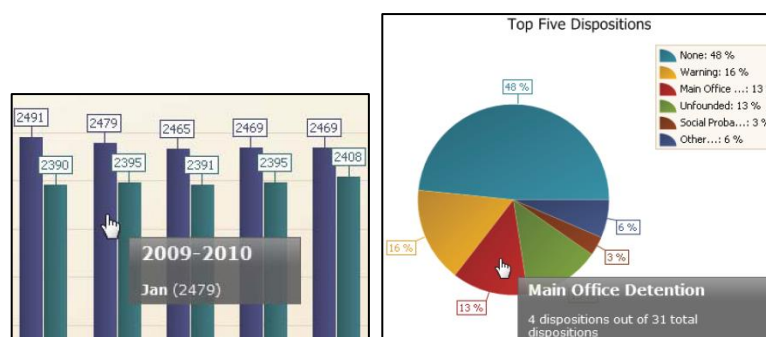
Mouse overs will display the series to which the data belongs, as well as the X and Y axis information (in the example above, on the left, the series is 2009-2010, the X value or "Month" is Jan, and the Y value or "Count" is 2479).

To view additional details about a data point or range of data, click on the point or section of the graph. Details about the selection will display below the graph.
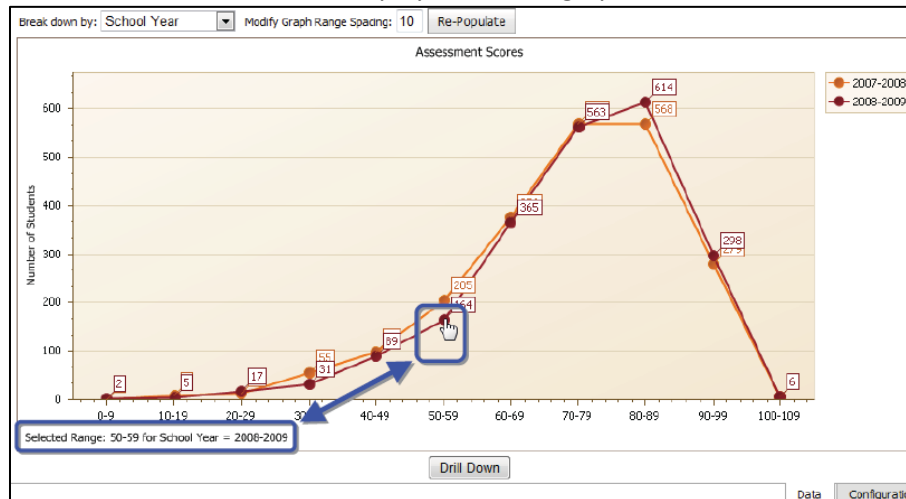

When working with pie charts, the selected piece will separate from the rest of the pie to indicate the selection.
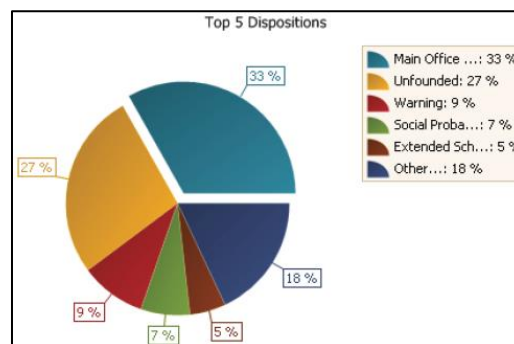
Users can use the Drill Down button to view additional details about the data. Refer to the section on Using the Drill Down Feature for details on this feature.

Note: The ability to drill down in a dashboard is controlled by a security option; when this option is disabled, the Drill Down button will not be available.

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Some charts also include options that allow the user to select different criteria or change the way in which data is broken down in the chart. These breakdown or range options are usually provided as one or more drop-down menus above the chart. These menus may contain additional breakdown fields, depending on the filter fields that the user has added to the dashboard.
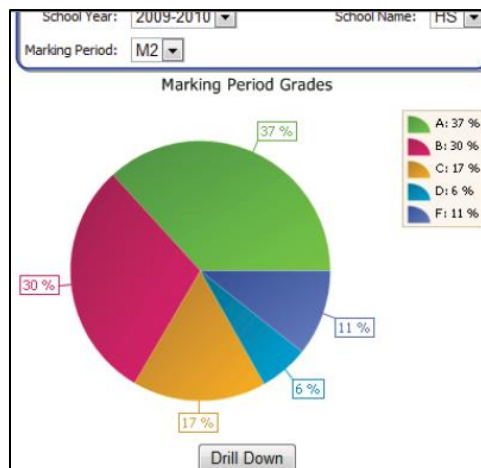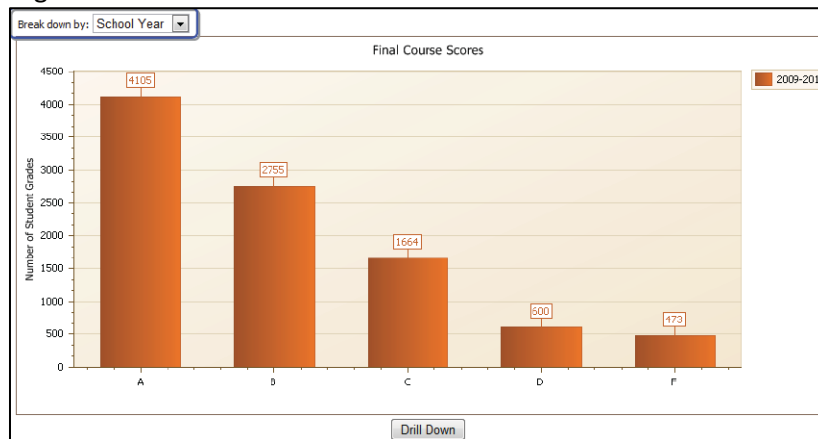

On the Attendance and Discipline dashboards, users with permissions to drill down will see an additional break down field that allows them to view data per student across a given school year. When breaking down by Student Name on the Attendance dashboard, viewing data in a yearly format (either by selecting a single year or by grouping by school year) will provide a "Top ___ absence counts" field to allow users to limit data to a sub-set of students with the most absence counts (a corresponding break down option exists for late arrivals as well).

For example, entering 5 in this field will return students with the 5 highest absence counts (counts may include multiple students, so the number of students returned may be higher than the value entered in this field).

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This functionality is paralleled when breaking down on Offender on the Discipline dashboard.
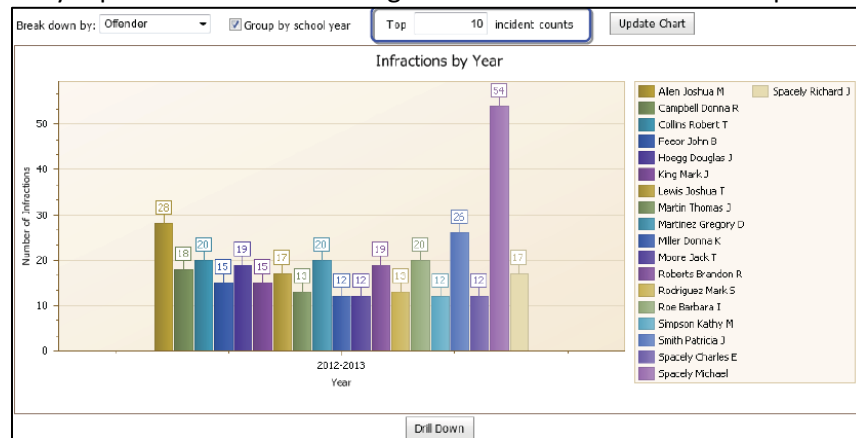
Certain charts (on the Assessments and Course Scores dashboards, for example) may display information about scores such as the average score for all data and for the selected series. Hover the mouse over the line indicating the Average Score to view the numeric value (on the Comparative dashboard, you must first check the box to Enable mouse-over information.
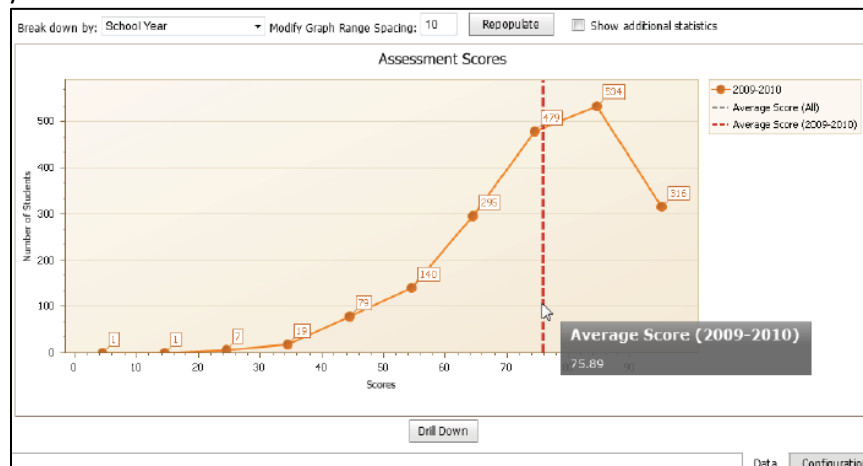

To view or hide additional statistics information (including median and standard deviation range), click the Show additional statistics checkbox at the top of the chart.

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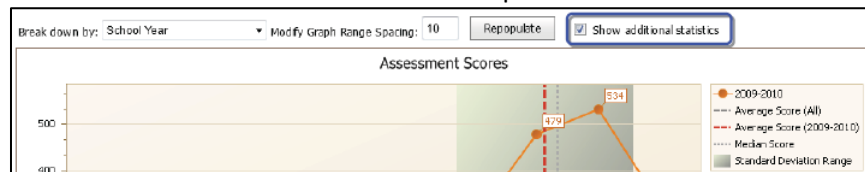
Configuration Tab

Users also have the ability to change the way any chart is presented by using the Configuration tab. Currently users are able to change the color palette of any chart or the chart type (available chart types depend on the type of data presented by the chart). Simply use the drop-downs to select the change(s) and click the Update button to refresh the chart with the selected preferences.
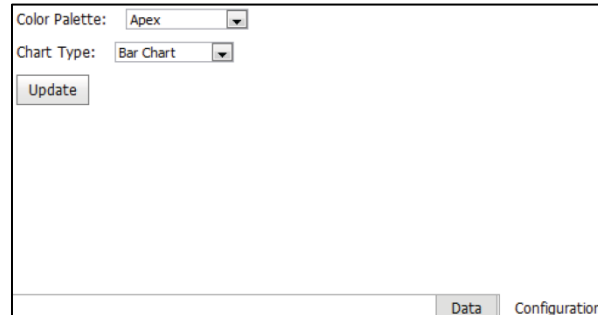
Exporting Charts

Dashboards also allow users to export the chart data into a variety of formats. To export, right click in the graph or chart to be exported and select the desired format from the drop-down menu. Select whether or not to show the Filter Label and click the Export button.
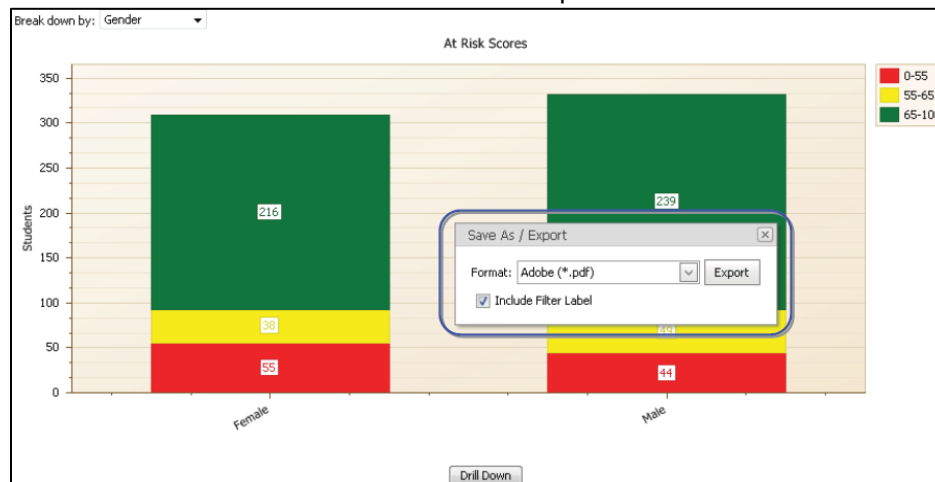
Export options include the following file formats:

- Adobe (.pdf)
- Excel (.xls)
- Image (.jpg, .bmp, .png, .gif, or .tif)
- Text (.txt)
- Rich Text (.rtf)
- Web Archive (.mht)

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Using the Drill Down Feature

Throughout the dashboards, users may see various Drill Down buttons located below charts, graphs, or tables (the availability of this button is dependent on user permissions, so not all users will see this button on dashboards). These buttons allow users to view additional levels detail about their data.
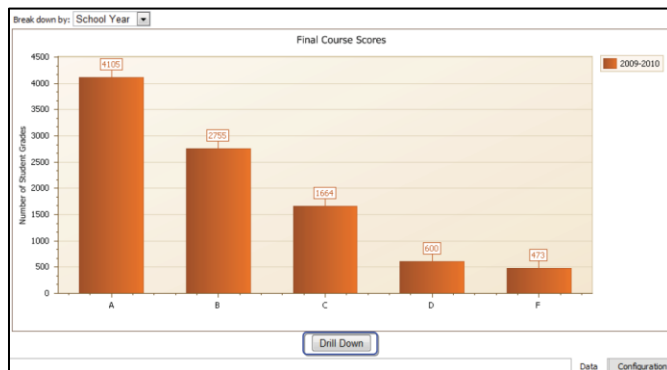
In some cases, the Drill Down button will provide the user with an additional level of data, presented as a chart, based on the criteria selected before using the Drill Down button. Users can then drill down another level to reach the final table of data.
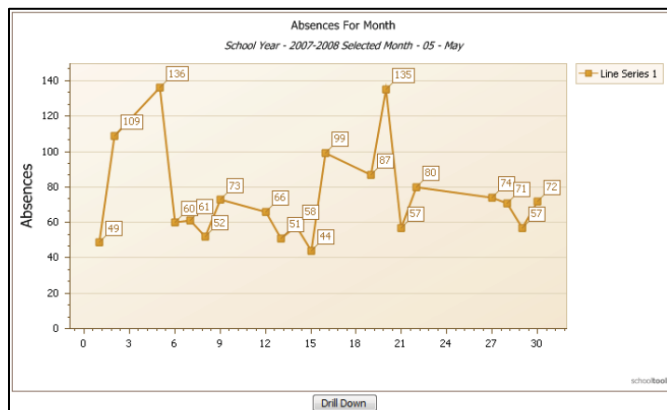
In most cases, clicking the Drill Down button will provide the user with a table of data based on the selected criteria. This table includes details about individual records from which the chart or graph was derived. This table can easily be exported for data manipulation by clicking the Export to Excel button in the upper left corner.

Each Student ID will be presented as a hyperlink. Users can click any Student ID link to jump immediately to the Student View dashboard for that student.

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In addition, users can click the Save as Student Filter button to immediately update the student filter with the students included in the results list. Once applied, a message will appear to confirm that the filter has been updated. The top menu will also indicate that a Student ID filter is active.

This student filter will be retained for the duration of that user's session. As with student filters loaded manually from the Configuration tab, a message will appear in the upper right corner of the main window to notify the user that a student filter is active. The filter will be applied to any dashboard during the user's session. Click the Clear Filter button in the upper right corner of the main Dashboards page to remove the filter (or click Clear in the top menu bar of any dashboard to remove it).

Or

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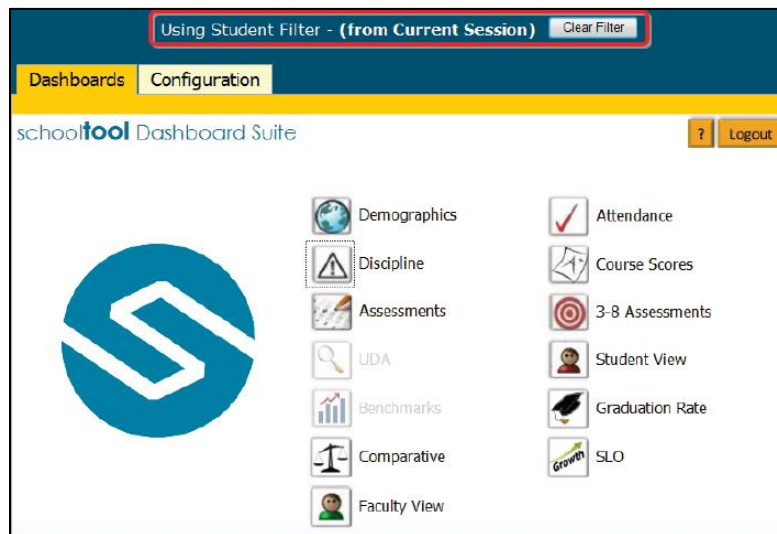
Using the Student View Dashboard

The Student View dashboard allows users to review multiple types of data for an individual student on one screen. Because of the way data is presented here, this dashboard functions slightly differently from the other dashboards.

When accessing the Student View from within the Dashboard Suite, users can also view data for a group of students. When group mode is selected, the dashboard will reflect averages of all selected students' data for each chart.

Note: Users who are SchoolTool Faculty can view Student Dashboards from within SchoolTool by navigating to a student record. Faculty-only users may not have access to discipline data or breakdowns for attendance and/or discipline and will be unable to drill down on charts.

The Student View dashboard provides the following charts:
- Absence & Infraction Count By Year (this includes daily absences and late arrival data, as well as referral data)
- Assessments and Final Course Scores
- 3-8 Assessment Scores
- User Defined Assessments (UDA)

If no data is available for a given chart, the chart will not be displayed on the dashboard.

Due to the nature of the data presented, these charts do not allow users to drill down unless they have clicked on a data series within the chart.

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Viewing Data for a Single Student

To begin using the Student View dashboard, users must first locate the student(s) whose data they wish to view. Use the filters at the top of the screen to narrow the list of students. Be sure that the Selection Mode option is set to Single (this is the default). In addition, users may search for a specific student by name. To search, type the first and/or last name (or part of the name) in the Student Name Search box and click Update Page Data or press the Enter key. All filters will respect users' building security rights.

Note: The search field works in conjunction with filter selections. Therefore, if a user selects only "High School" from the School Name filter and types "Smith" in the student name search field, the results will include only students in the High School whose name contains "smith".

After clicking the Update Page Data button (or pressing the Enter key), a list of students meeting the selected criteria will appear below. Results are sorted alphabetically and grouped by student last name. Click on the appropriate student; the Student View will then open in a new window. The Student View dashboard presents all available data for that student.

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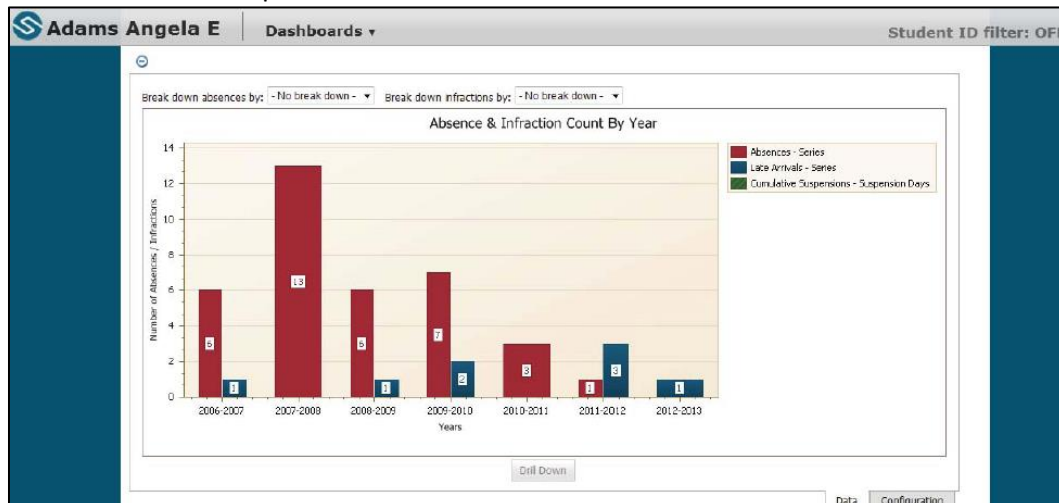
Viewing Data for a Group of Students

To view data as an average of values for a group of students, use the filters at the top of the screen to locate students as you would for a single student. After clicking the Update Page Data button (or pressing the Enter key), a list of students meeting the selected criteria will appear below. To use group mode, select the "Group" option under Selection Mode.

The results tab will refresh to show a list of all students included in that group. Click the View Students button to proceed to the Student View dashboard for that group of students.

The Student View will open to show charts using average values across that group of students for each data point. Due to the nature of the data, the User Defined Assessment chart will not be displayed when viewing the Student View in group mode.

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Using the Faculty View Dashboard

The Faculty View dashboard allows users to review multiple types of data for an individual faculty member on one screen. Because of the way data is presented here, this dashboard functions slightly differently from the other dashboards.
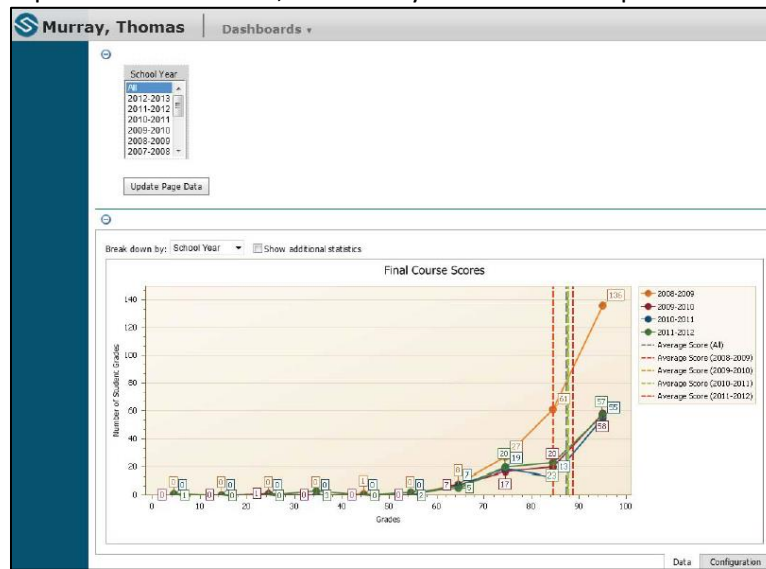

To begin using the Faculty View dashboard, users must first locate the teacher whose data they wish to view. This may be accomplished by using the filters at the top of the screen to narrow the list of faculty. In addition, users may search for a specific teacher by name. To search, type the first and/or last name (or part of the name) in the Faculty Name Search box and click Update Page Data or press the Enter key. All filters will respect users' building security rights.

After clicking the Update Page Data button (or pressing the Enter key), a list of teachers meeting the selected criteria will appear below. Results are sorted alphabetically and grouped by faculty last name.
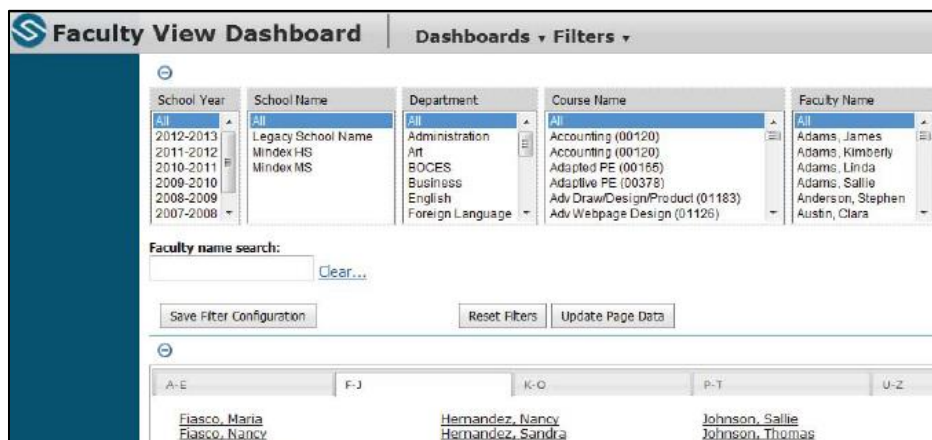
Note: The search field works in conjunction with filter selections. Therefore, if a user selects only "High School" from the School Name filter and types "Smith" in the faculty name search field, the results will include only teachers in the High School whose name contains "smith".

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Click on the appropriate teacher name; the Faculty View will then open in a new window.
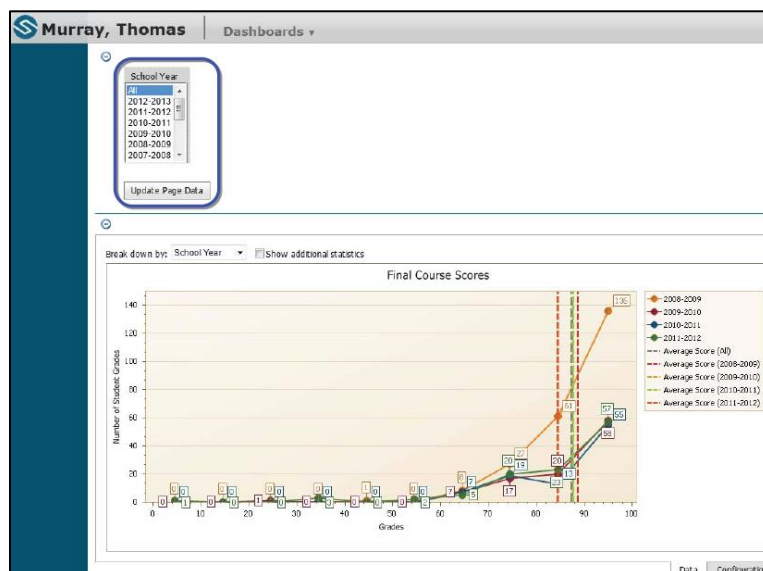

The Faculty View dashboard provides the following charts:
- Final Course Scores
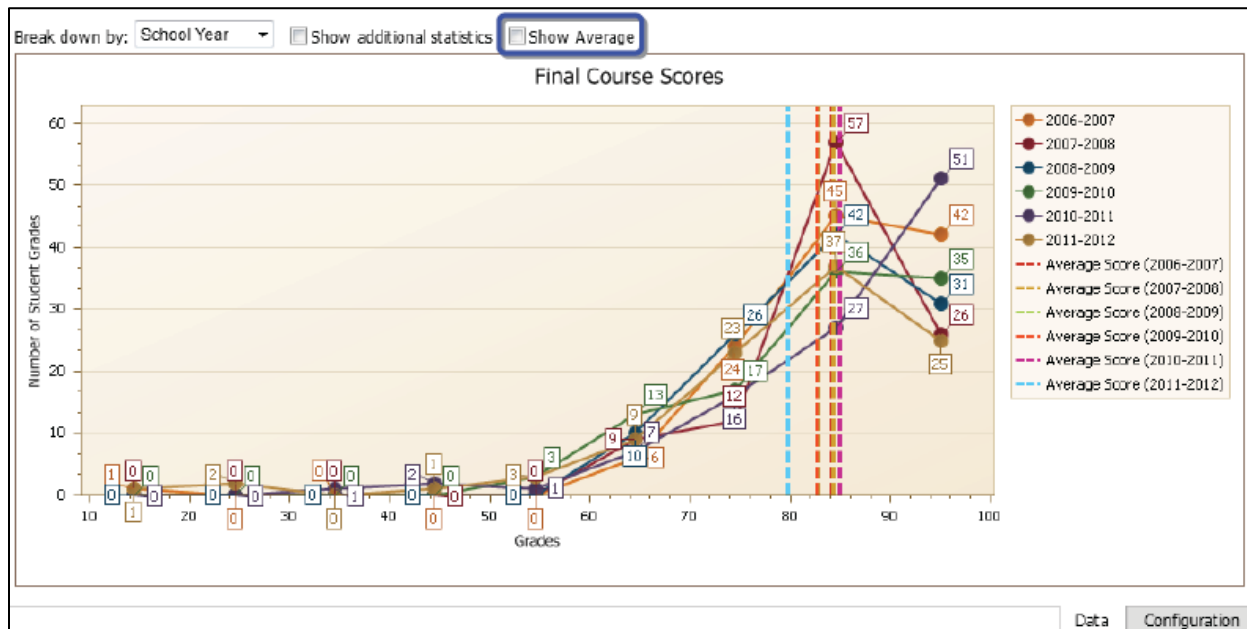- Assessments
- SLO Target Met
- SLO Average Growth

If no data is available for a given chart, the chart will not be displayed on the dashboard.

To select a sub-set of school years for which to show data, click the Select Year(s) button at the top of the screen.

Select the desired years, then click Update Page Data.

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Some charts include a "Show Average" checkbox option. When this option is checked, the chart will display the data as an average of all course scores for each year, rather than showing each year's data as separate lines.

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Using the Comparative Dashboard

The Comparative dashboard allows users to compare two sets of data by choosing the sets of information they wish to see on the X and Y axes.

To begin, use the filters in the upper section of the screen to specify any appropriate criteria to filter the students you wish to include.

Next, select the appropriate options for the X and Y axes to specify which data you want to compare. Choices include 3-8 Assessments, Assessments, Course Scores, and User Defined Assessments. Depending on which option you select, additional drop-downs may appear to allow you to specify further. Once you have made all necessary selections, the chart below will update to reflect your choices.

The chart will update, allowing you to compare data between the selected elements. A variety of breakdown options will be available for both axes.

Use the X and Y range fields to view details on data points within a specific range based on the X or Y axis. This allows users to narrow down the range they are viewing to a sample set of students and compare specific data points within that set of values. Drill-down functionality will respect the selected range and will only include students whose data is visible on the chart.

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To view additional information about the data, use the checkboxes above the chart to Enable mouse-over information for data points or Enable statistical trend line to view the trend line based on the actual data shown by the chart.
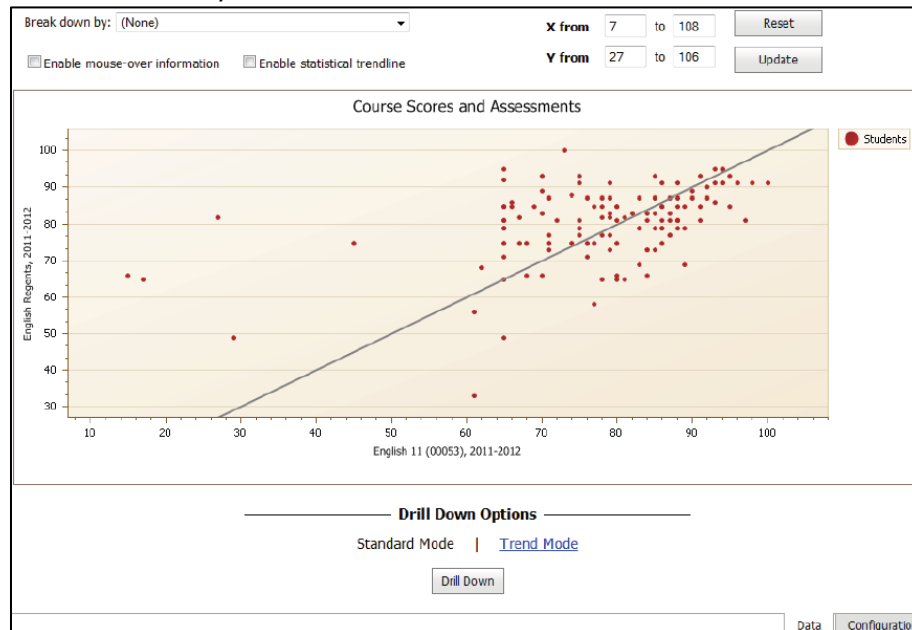
Because of the nature of the comparison chart presentation, users have access to an additional Trend Mode drill-down option. Trend mode allows users to view a list of students whose data points fall outside a specified proximity to the trend line. This allows users to obtain a list of "outliers" that are not within a given distance above or below the trend line.

Specify the selection set (points above the trend line, below the trend line, or both above and below), then specify either a threshold (number of points or a percent) to indicate the distance from the trend line that you wish to examine. For example, choosing a threshold of 10 points will show students whose data points are 11 or more points away from the trend line.

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Using the SLO Dashboard

The SLO (Student Learning Objectives) dashboard provides users with the ability to review existing SLO data trends for percentages of students meeting SLO target scores and average student growth. It also allows users to manipulate charts to see other possible scenarios. For example, an administrator can adjust the target scores by a specific percentage or number of points to see how the same data might look if a different target score had been used.

Note: The SLO dashboard shows only course sections that have active SLOs and will only return data for students who have a Pre-Score and a Post-Score.

The SLO Target Met chart displays the percentage of students who met the SLO Target and can be broken down by a number of options. To adjust the target and see how the data might look if the target were different, enter a number (positive or negative) and select either percent or points to indicate how the target should be adjusted.
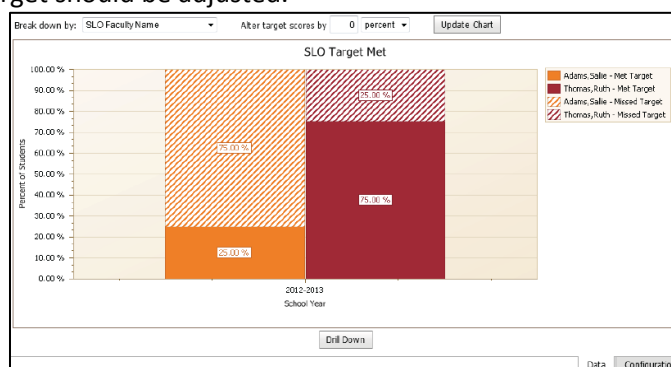
When drilling down from the SLO Target Met chart, users will be presented with a new chart that indicates how each student performed. If the target has been adjusted, the drill-down chart will reflect the adjusted target as well. The SLO Data Points column shows a visual representation of each student's pre score, target score, and post score. Student growth is shown as either green, to indicate the student met the target score, or red, to indicate the student did not meet the target. Users can drill down a second time to obtain the student results list, which includes columns for adjusted target information as well as the actual data.

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The Average Student Growth chart shows the average difference between post score and pre score for each student for each breakdown group. Use the minimum/maximum fields to adjust the Y-axis (growth points) if needed.
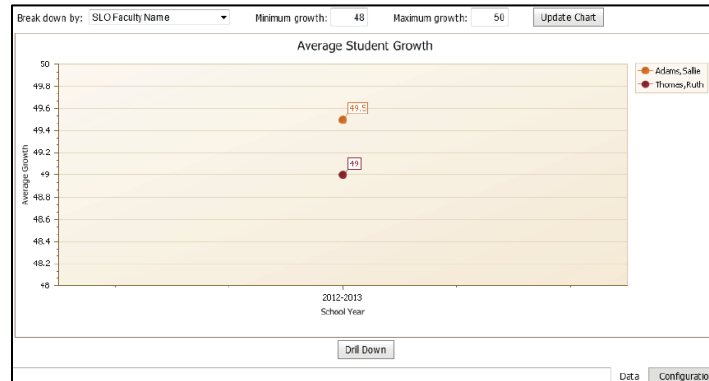
Note When Using Dashboards

Demographics Dashboard - This data will display as of the 1st of the month.

Course Scores Dashboard – Only 4 marking periods will display at a time regardless of whether the building uses 6 marking periods.

Benchmarks Dashboard – Is only for districts using Standards based grading.

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Configuration Tab

The Configuration area provides users with tools to customize various parts of the SchoolTool Dashboard Suite to meet their needs. To use the configuration tools:

1. Open an internet browser, navigate to your SchoolTool Dashboards site and log in.

2. Click on the Configuration tab to open the appropriate configuration tool. Keep in mind that certain Configuration options may not be available for all users.
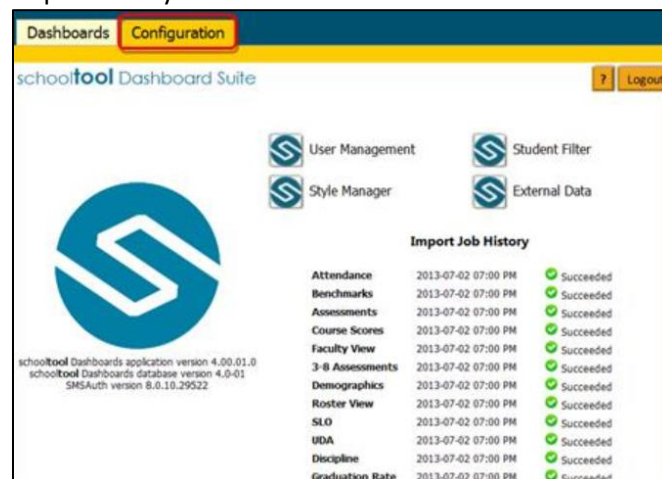
3. The bottom of the Configuration tab displays version information and a history of import jobs. The version history, in the bottom left corner, includes the current application version and the database version. To the right, the Import Job History shows a list of the most recent import jobs (these generally happen behind the scenes overnight) and the status of each.

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User Management

The User Management area provides administrators the ability to create, modify, or remove user accounts. Administrators can modify or reset passwords, define users' building and field access, and provide account management access to certain users. Global settings can also be configured here, for options such as session timeout configuration that affect all users.

Note: If your district allows Dashboard access from within SchoolTool, users from SchoolTool will appear in this user table but will not have the "Enabled" checkbox checked unless an administrator has manually enabled it from this screen. The "Enabled" checkbox is used to give the user rights to log in from the Dashboard Suite login screen rather than directly from SchoolTool.

1. To create a new user account, click the Add ➕ button in the upper right corner of the screen.
   A. Enter the new account's user name in the box provided and click OK.
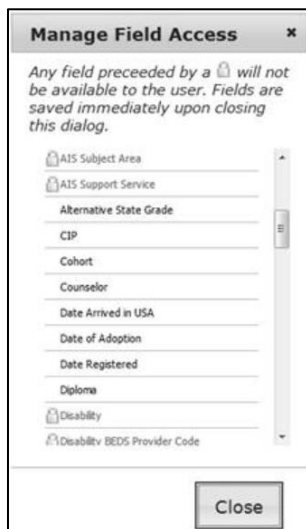
   B. On the right side of the screen, enter the appropriate information for the new user. All accounts must have, at a minimum, a user name and at least one building selected. If your district allows users to access Dashboards from SchoolTool, building rights will be automatically populated based on their SchoolTool rights the first time they log in. If there are differences between the buildings selected here compared to their SchoolTool rights, the building selections here will override their SchoolTool permissions.

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C. To limit a user from accessing specific fields, click the Field Access button. A list of common fields will appear (this list includes fields shared by all dashboards, such as demographics and program service data). Click on the fields to show or hide from that user (a lock 🔒 icon will appear beside any fields that the user cannot access).
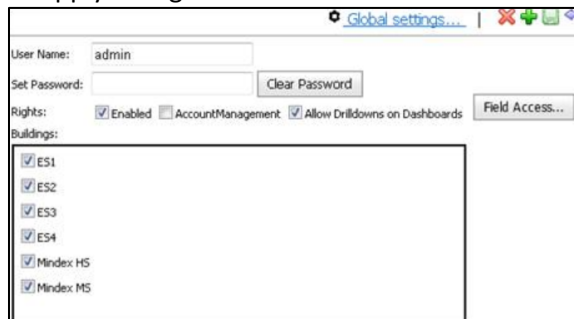
D. Once the account information has been configured, click the Save 💾 button to finish.

2. To modify an existing user account, use the filters in the user list to locate the individual and click on the appropriate row in the list to select it.

A. Enter or modify the password, rights, and/or building access as appropriate and click the Save 💾 button to apply changes.

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Notes:
- If using mixed authentication (both local accounts and active directory, for example), be sure to create unique user names if creating both types of accounts for a single person.
- If not using local accounts at all, the Change Password button won't appear.
- Building rights are also respected by filters. For example, a user with no access to "High School" cannot select High School in the filter, nor can they see records from that building. This behavior is slightly different on the Student View dashboard, since filters will still only allow users to locate a student who was enrolled in a building to which they have access during the year selected, but the Student View dashboard will provide data for any school year once an appropriate student has been selected.
- Field access is respected by all dashboards and filters. Fields that are disabled for a user will not appear in filters, breakdowns, charts, or results lists.

Global Settings

To modify settings that affect all users, click the link to the Global Settings configuration area in the upper right corner.

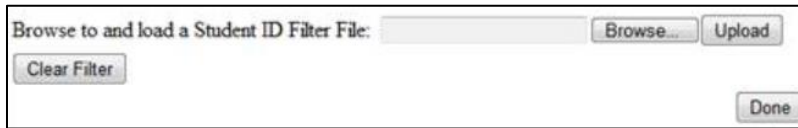A pop-up will appear, allowing the user to modify global settings for all users.

Global User Settings include the following options:
- Session timeout: This value, represented in minutes, will determine the length a user session may be inactive before the session will be ended and the user will have to log in again. To modify this value, simply enter a new session timeout length and click Save.

The remaining options are legacy options that were used in older versions of SchoolTool Premier. These should no longer be used as they will be removed from this screen in a future release.
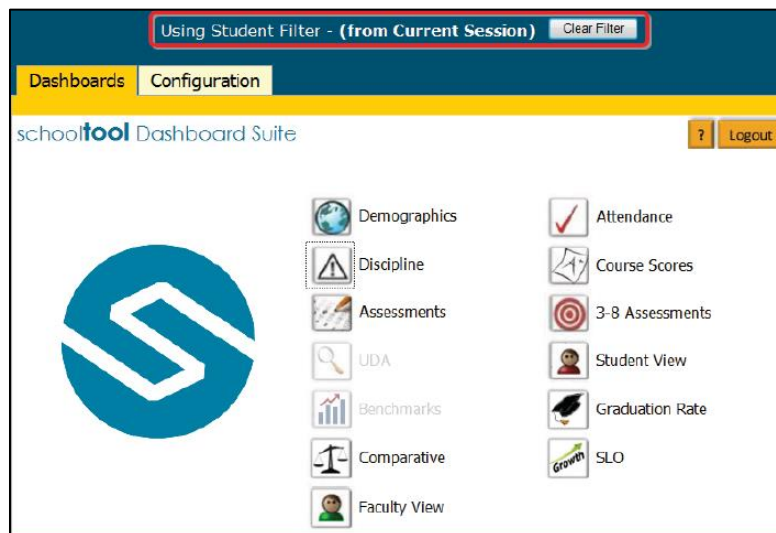
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Student Filter

The Student Filter area allows users to load a pre-defined set of student IDs to be used as a filter across all tree views and dashboards. Once uploaded, all tree views and dashboards will respect this filter until it is cleared.


1. Click the Browse button to locate a file containing student ID's (files must be either comma delimited or a single column of ID numbers, and must be standard text files that are readable by MS Notepad).
2. Click Upload to load the file.
3. Once the file has been uploaded, a message will appear indicating the number of possible student ID's contained in the file.
4. To continue using the current filter, click Done to return.
5. When a student ID filter is currently active, a message will display on the main launch page to indicate the name of the filter. To remove the filter and return to the default data set, click the Clear Filter button.

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External Data

Users can import third party data into SchoolTool Dashboards from the External Data wizard on the Configuration tab. Currently this functionality is only available for 3-8 Assessment data, but will be expanded in the future to provide additional support for imports.
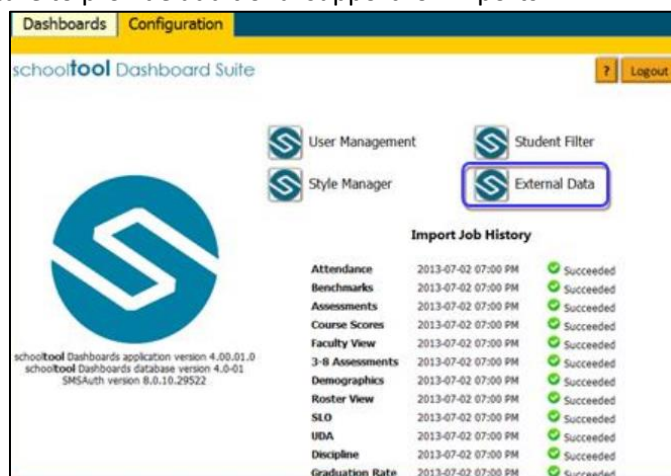
Note: Imported data will be available after the next data pull. These occur as automatic, behind-the-scene jobs run overnight; therefore, imported response arrays will be available the day after importing.

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