Workbook #2:
Karuta Dashboards and Reports

Introduction

The purpose of this workbook is to demonstrate how to create a student dashboard and an aggregated report of assessment data across all students in a class, program, or institution. The report will be exportable in CSV format for extended reporting using other applications. The starting point for this workbook is the end of *Workbook 1: Getting Started with Karuta*. This workbook will build upon everything you created using Workbook 1.

Part I: Add Values to Items in the Rubrics Portfolio

1. To begin, go back to the Rubrics Portfolio you created in Workbook 1. You will start by adding a value to all of the teacher evaluation Item elements.
    a. Use the Pencil button to edit each Item element and add a value to the Item Value field.
    b. For “Has not reached the objective”, assign Item Value 0. For “Has reached the objective”, assign Item Value 1. For “Has exceeded the objective”, assign Item Value 2.

Edit an element.

Part II: Add Semantic Tags to the Reusable Components Portfolio

1. On the Learning Outcome Page in the Reusable Components Portfolio, assign unique semantic tags to all elements that you will want to refer to in the dashboard and in the report.
    a. In the Evidence Submission subsection, edit the Self Evaluation element: under the Metadata tab, delete the default semantic tag and change it to “`self-evaluation`”.
    b. In the Teacher Evaluation subsection, edit the Evaluation element: under the Metadata tab, delete the default semantic tag and change it to “`teacher-evaluation`”.

Semantic Tag:
Unique identifier for an element in a portfolio. Alphanumeric characters and dashes only.

Part III: Update the Portfolio Model

1. In the Learning Outcomes section of the Portfolio Model, use the Delete button to delete both Learning Outcome pages (Written Communication and Teamwork and Collaboration).
2. Using the Learning Outcomes section's Menu button Menu to add two Learning Outcome pages. (This allows you to "paste" the newly updated version of the page.)
    a. Rename the two pages "`Written Communication`" and "`Teamwork and Collaboration`".
    b. Open each page to verify that the Self-Evaluation and Evaluation elements have the new semantic tags.
3. Finally, on the Profile page, assign the semantic tag "`student-name`" to the Name element.

Part IV: Create the Dashboard Model

1. From your account home page, click the Stack Bars button for the project and choose Create a Report Model. (Dashboard models and report models are both created using the Report Model. The only difference is that for a report we add an element to iterate over all portfolios.) Give it the code "`gen-ed-dashboard`" and the label "`GEN ED Dashboard`".
2. Open the Dashboard portfolio. Click on the Menu button Menu on the top right and choose Add Table. Using the new Table element's Menu button, choose Add Row. This first row will be for column headings.
3. Using the Row element's Menu button, add a cell. Leave this cell blank.
    a. Add a second cell to the same row - it will appear below the first cell, inside the row. Using the cell's Menu button, choose Add Text. In the Text to Display field, write "`Self Evaluation`".
    b. Using the cell's pencil button, under the CSS Styles tab, format the Node Content. Click Bold for Font Weight, Center for Alignment, and choose a Background Color of your choice.
    c. In the same row, add one more cell and format it the same way. Add a Text element and in the Text to Display field, write "`Teacher Evaluation`".

Delete an element.

Menu
Custom menu (may be created for use by designer or end-user).

Create portfolios in a project.

Report Model:
Create a table that draws its data from elements in portfolios.

    d. You have now created the row with the dashboard's column headings.
4. Go back to the Table element's Menu button and choose Add ForEachNode. The ForEachNode element will appear below the first row you created. This element will iterate over each learning outcome page in the student's portfolio.
    a. In the Semantic Tag field of the ForEachNode element, write the semantic tag for the portfolio model's learning outcome pages ("`learning-outcome-page`").
    b. From the Node Type menu, choose the type of element that has been assigned this semantic tag: in this case Page.
5. Using the Menu button for this ForEachNode element, add a row. The system will create an occurrence of this row for each learning outcome page.
    a. Using the Menu button for this row, add a cell. Using the menu button for this cell, choose Add Node.
    b. For Node Type, choose Page. In the Semantic Tag field, write "`learning-outcome-page`". For To Display, choose Node Label. (In To Display, if you choose Node Label, the element's *label* will be printed in the table. If you choose Resource, the element's *content* will be printed in the table. See e. below.)
    c. If you wish, use the cell's pencil button to add the same formatting as you did in the cells for the column headings, given that this will be your row headings.
    d. Using the Menu button for this row, add two more cells. In each cell, add a Node element.
    e. In the first Node element, write "`self-evaluation`" in the Semantic Tag field and in the second one, write "`teacher-evaluation`". In both case, choose Resource Node for the Node Type and Resource for To Display.
6. Your dashboard model is now finished. Return to your account home page.

Part V: Add the Dashboard to the Portfolio Model

1. In the portfolio model, click on the portfolio name at the top left to access the root page. Using the root page's Add button, add a page.

2. Use the new page's Upward Arrow button to move this new page above the Learning Outcomes section.
3. Click on "`New Page`" to open the new page and rename it "`Dashboard`".
4. Use the Add button of the page to add a Dashboard element. Edit the Dashboard element and in the Dashboard Code field enter "`gen-ed-dashboard`".
5. Click the Refresh button to update the left hand panel. Click Dashboard on the left hand panel and make sure an empty version of the dashboard appears.

Part VI: Check the Content of the Dashboard

1. Delete the instance you created at the end of Workbook 1 and create two new instances in the same way you did at the end of Workbook 1.
    a. For each instance, provide the code: "`gen-ed-assessment-portfolio-`*`Dummy-User-Name`*" and the label: "`GEN ED Assessment Portfolio - `*`Dummy User Name`*".
    b. Share the portfolios with each test account accordingly.
2. Log into your two test accounts and populate the student self evaluations and teacher evaluations in each new portfolio instance. Within each instance, check that the dashboard reflects the values you have populated.

Part VII: Create the Report Model

1. In your project, create a second Report Model. Use the code "`gen-ed-report`" and label "`GEN ED Report`". Open the new Report Model.
2. From the Menu button top right, choose Add Table. Similarly to the dashboard, create the row for the column headings. From the Menu button of the Table element, choose Add Row.
    a. In the row, add a first Cell element and leave it blank.

Move an element up.

Refresh or update the content of a portfolio or your account homepage.

   b. Then add three more cells. In each cell, add a Text element and format the cell as you like. In the field Text to Display for the second cell write “`Written Communication`” for the third cell “`Teamwork and Collaboration`”, and for the last cell “`Average`”.

3. From the Menu button for the Table element, choose Add ForEachPortfolio. This element will appear below the first row you created. This element will iterate over every student portfolio.
   a. In the field Select Portfolios, enter:
   `code*='`*`your-project-name`*`.gen-ed-assessment-portfolio-'`
   (replacing with the correct value for *your-project-name*)
4. From the Menu button for the ForEachPortfolio element, add a row. Karuta will create an occurrence of this row for each student portfolio.
   a. In the field References to Init for this row, enter “`student-average`”.
   b. In this row, add a cell. In this cell, add a Node element.
   c. In the Semantic Tag field of the Node element write “`student-name`”. For the Node Type choose Resource Node. In To Display choose Resource.
5. From the current row’s Menu button, choose Add ForEachNode. This element will iterate over every learning outcome page of a student’s portfolio. In the Semantic Tag field write “`learning-outcome-page`”. For Node Type choose Page.
   a. From the Menu button for the ForEachNode element, choose Add Cell. In the cell, add a Node element. In the Semantic Tag field write “`teacher-evaluation`”. For Node Type choose Resource Node. For To Display, choose Item Value. In the Reference field, type “`student-average`”.
6. To the current row, add a cell. From the Menu button for the cell, choose Add Aggregate. For Aggregation Type, choose Average. In the Select Reference field, type “`student-average`”.
7. Your report model is complete. Go back to your account home page.

Part VIII: Create a Separate Portfolio Model to display the Aggregated Report

1. The aggregated report will not be displayed in individual student portfolios but rather in a separate portfolio, for use by teachers and/or administrative personnel. In your project, create a new Portfolio

Model. Give it the code “`gen-ed-report-portfolio-model`” and the label “`GEN ED Report Portfolio Model`”. Open it.

2. Access the root page by clicking on the portfolio name at the top left. Add a new page to the portfolio. Open it and rename it “`Aggregate Report`”.
    a. To this page, add a Dashboard element. Edit the element and in the Dashboard Code field, write “`gen-ed-report`”.
    b. For Display CSV, write “`1`”.
3. Refresh the portfolio. Click Aggregate Report on the left hand panel. You will see a report appear for the two portfolio instances you created in Part VI. Make sure the evaluations and averages correspond to the content of the two instances.
4. You may use the CSV button under the table to export the report data as a CSV file.
