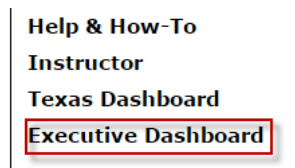


1 - Logging In:

When designated users log in to escWorks®, they should automatically be logged in to the Executive Dashboard as well. A link to the dashboard should appear in the left hand navigation pane of escWorks®.



2 - Navigation:

The main methods of navigation within the dashboard are the **TABS** near the top of the screen and the **scroll bars** on the right side of the main page, and within the data window.

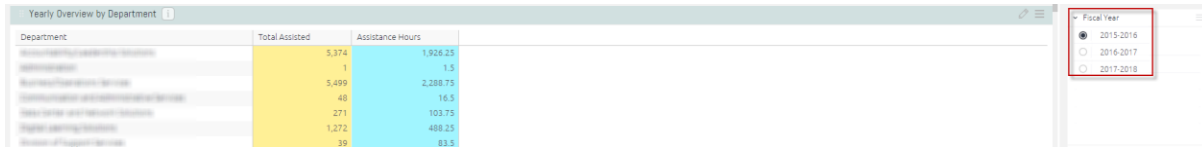


Clicking the name of a dashboard in the desired TAB will open the selected dashboard.

3 – Fiscal Year Selection:

The new revision of the Executive Dashboard allows the viewer to select the fiscal year directly in the dashboard. Simply select the desired fiscal year from the list on the right side of the page. The list consists of radio buttons to prevent inadvertently selecting multiple years.

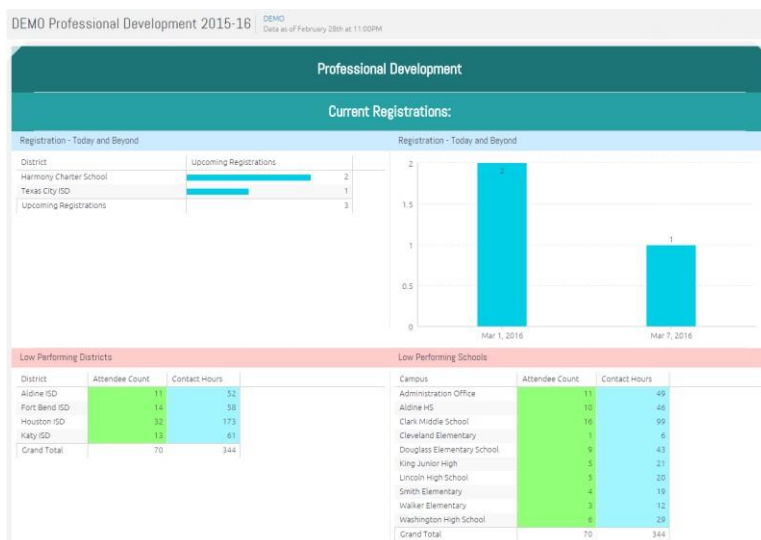
It is important to note that the dashboard displays the current fiscal year and the last fiscal year.



4 - Dashboard data organization:

Every effort has been made to organize the dashboards in logical order. Each dashboard displays related information in groups or clusters.

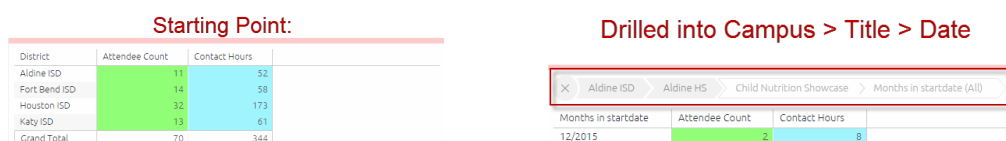
The summary information is displayed in graph, chart, or table format. Additional supporting or detailed information can be found by 'selecting' or 'drilling'. These features will be detailed in the next section.



5 - Drilling for Data:

Drilling into data allows the user to explore the underlying information. For example, by drilling into a District name (below) it can be determined which campuses attended, which sessions were attended, on what date, etc.

The drilling process allows the user to 'go back' to previous categories, or to cancel the drilling process and reset to the original format:



What can be **DRILLED** into?

Drilling into data is limited to the left hand columns of tables or specific parts of charts and graphs, usually the bar or line. There are up to five default drilldown choices which may vary, depending on the type of data (Professional Development vs. Technical Assistance).

To drill down, **right click** on an item in the list (or on the chart/graph) and select the desired field:

1. Right Click

District	Attendee Count	Contact Hours
Aldine ISD	11	52
Fort Bend ISD	14	58
Houston ISD	32	173
Katy ISD	13	61
Grand Total	70	344

2. Select from the list:

District	Attendee Count	Contact Hours
Aldine ISD	11	52
Fort Bend ISD	14	58
Houston ISD	32	173
Katy ISD	13	61
Grand Total	70	344

3. Result: Drilled into Campus > Title >

Months in startdate	Attendee Count	Contact Hours
12/2015	2	8

4. Backout or Reset by clicking

Months in startdate	Attendee Count	Contact Hours
12/2015	2	8

Special Note: In some cases, the 'drill into' list may appear slightly differently.

Drill
Lname
SessionID
Position
Title

Recent
Position
SessionID
Title

6 – Selecting Data:

Selecting data works differently than drilling in to data. When an item such as a bar in a graph, a point in a chart, or item in a list is selected, related data remains active (and drillable), while unrelated data becomes inactive (grayed out).

It is important to remember to de-select the data when finished, as the selected status may also result in some data views' information to be replaced by a 'No Results' message.

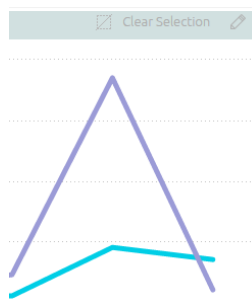
How to 'select' a data element:



How to de-select data elements:

When data elements are selected, a 'Clear Selection' option will appear in the upper right corner of the data pane.

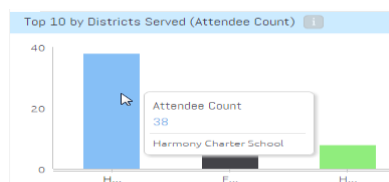
Clicking on 'Clear Selection' will restore the data pane and other related data panes to their default displays.



7 - Hovering for more information:

Another easy, but useful function is hovering. Hovering the mouse cursor over most data elements will provide additional information in the form of a 'pop-up'.

Simply move the mouse cursor over a data element and stop. The pop-up with additional information will appear.



8 – About COOPs and Savings:

The **COOPs and Savings** dashboard provides cost savings information based on the amount COOP members have paid for sessions versus the cost at the Standard Session Fee rate.

This dashboard has the ability to display COOP data according to different fiscal years as well as multiple fiscal years.

To change the fiscal year(s) viewed, click the box(es) next to the desired year(s) in the Filter pane on the right side of the dashboard. When the page refreshes, the data for the selected year will appear.

COOPs and Savings					
By COOP					
COOP Name	Standard Session Fee	COOP Session Fee	Attendee Count	Total Credit Hours	COOP Savings
COOP 1	\$25	0	11	66	\$275
COOP 2	\$150	0	2	12	\$300
COOP 3	\$150	0	41	54	\$6,150
COOP 4	\$100	0	15	45	\$1,500
COOP 5	\$150	0	10	60	\$1,500
COOP 6		10	54	0	\$7,560
COOP 7	\$75	50	2	12	\$50

FILTERS

Fiscal Year

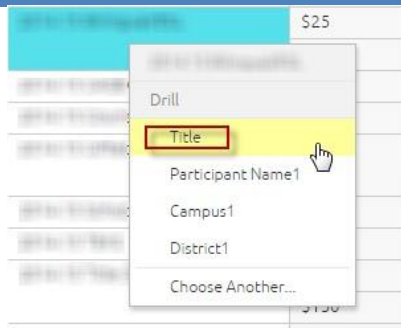
☐ Start typing to search...
☐ 2011-2012
☐ 2012-2013
☐ 2013-2014
☐ 2014-2015
☒ 2015-2016
☐ 2016-2017

Additionally, in the 'By COOP' view, there may appear 'blank spaces' under the COOP Name. In the example below, there is such a blank space under the first COOP Name.

This indicates that the COOP offered two sessions, each with a different 'Standard Session Fee', but both with a '0' COOP Session Fee:

COOPs and Savings					
By COOP					
COOP Name	Standard Session Fee	COOP Session Fee	Attendee Count	Total Credit Hours	COOP Savings
COOP 1	\$25	0	11	66	\$275
	\$150	0	2	12	\$300
COOP 3	\$150	0	41	54	\$6,150
COOP 4	\$100	0	15	45	\$1,500
COOP 5	\$150	0	10	60	\$1,500
COOP 6		10	54	0	\$7,560

The names of the sessions can be found by right clicking the COOP Name and selecting 'Title' from the list:



The result of drilling into Title: (Remember to cancel the drill by clicking on the 'x' in the upper left corner of the data pane)

By COOP					
COOP 1 > Title (All)					
Title	Standard Session Fee	COOP Session Fee	Attendee Count	Total Credit Hours	COOP Savings
Title 1	\$25	0	11	66	\$275
Title 2	\$150	0	2	12	\$300
Grand Total			13	78	\$575

9 - Exporting options:

Data can be 'exported' in two ways – as an image file (.png), or as a CSV file.

Currently, individual data panes can be exported.

It is also important to note that the results that appear in the data pane are what are exported.

If any drilling or selections have been made, the export will only contain the drilled or selected data.

Click the Menu icon, then click
Download, then the file type...

In Region Charter Attendees		
Charter	Attendee	Download
Region 1 Charter Attendee	2	Image
Region 2 Charter Attendee	4	CSV File
Attendee Count	6	

Result of exported 'Image' file (.png):

In Region Charter Attendees	
Charter	Attendee Count
Region 1 Charter Attendee	2
Region 2 Charter Attendee	4
Attendee Count	6

Result of exported 'CSV' file (.csv):

	A	B
1	Charter	Attendee Count
2	Region 1 Charter Attendee	3
3	Region 2 Charter Attendee	1
4	Region 3 Charter Attendee	38
5	Region 4 Charter Attendee	1
6		