Lesson #1 - The Executive Dashboard

Review (Optional)

The first lesson in this Learning Series, Supervisors and Managers, is designed to get you familiar with using the Executive Dashboard as a manager. You may wish to review the articles in the Jackrabbit Basics category if you are just getting started with Jackrabbit.

- **Jackrabbit Basics Category**

The Weekly Calendar - Your Command Central

The Weekly Calendar button on the Executive Dashboard opens a calendar view of your classes by week. This is your class command center and allows you to manage almost all areas of your classes from one screen! *Note:* The Weekly Calendar is for internal use only, it is not available to your families.

You'll also have access to the Weekly Calendar using the Calendarlink above the blue menu bar on all screens in your database.
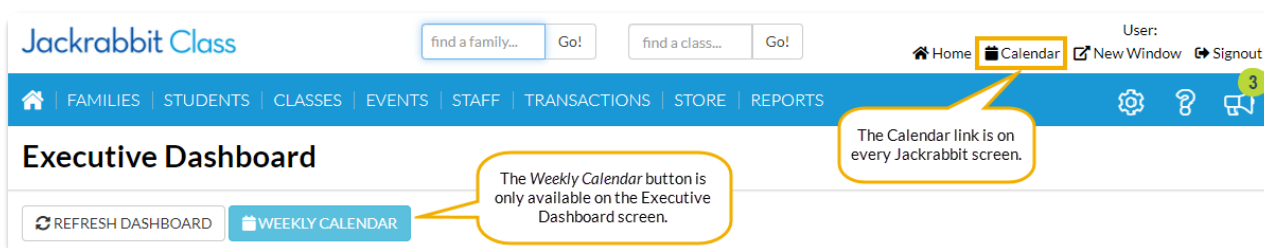
The Weekly Calendar opens in a new window and displays a week-long calendar of classes. While the Weekly Calendar is most easily accessed from the Executive Dashboard, you can also navigate to this calendar from the *Reports (menu) > Find a Report > Classes/Enrollment (left menu) > Classes* (tab) > *Weekly Calendar*. Other calendar/schedule views, such as a monthly or by room, are also available. These are discussed in more detail in our Help article **Class Calendars and Schedules**.

Note: The Weekly Calendar and other calendar options (daily, monthly, and room) only include your class offerings. At this time your Events are NOT included. Access to the Events calendar can be located at *Events (menu) > Calendar*.

Weekly Calendar Features

1. Calendar Criteria and display buttons allow you to customize your calendar view.

   - When first opened your Weekly Calendar will bring up the current week's schedule with no criteria selected (no filters applied, all classes showing).

   - Use the **Prev** and **Next** buttons, or the **date field**, to change the week you are viewing.

   - The currently selected criteria are displayed.

   - Use the **Change Criteria** button to edit those selections.

   - Use the **Add Class** button to quickly add a class. You can also add a class by clicking into a specific time slot.

   - Click the **Settings** button to change the time range that your calendar displays. Set this to your facility's opening and closing time.

   - Select **Show Students** to add the enrolled students' names to the class information that displays when you rest your mouse pointer over the class on the calendar (hover without clicking).

- The **Show Full Classes** checkbox defaults to checked to display full classes as well as classes with openings. Clear the checkbox to hide classes that are full which makes it easier to find a class with an opening to enroll a student in.

2. Click the **link** on a date to look at the daily view. The display criteria you have selected will also be applied to that daily view. For more information on the daily view see our Help article **Class Calendars and Schedules.**

3. Review the summary information for each class on the calendar at a glance. Click the **link** for quick access to the class record.
    - Class name
    - Number of openings (#)
    - Number of future drops #FD
    - Number of future enrolls #FE
    - Number of absences for that day (#a)
    - Number of makeups for that day (#m)

4. Accurate enrollment counts are displayed in real-time! A full class (0) that has a future drop scheduled for the following week will accurately reflect that opening (1) when you advance the Weekly Calendar to that date.

More Calendar Actions

- Double click into any open **time slot** to add a class. The *Add Class* window will open with the start date and time for the slot that you clicked into pre-selected; these values can be edited. You can also use the *Add Class* button in the Criteria section to open the *Add Class* window with no pre-selection made.

- Click a **link** for any of *Future Drops, Future Enrolls, Absences,* or *Makeups* to open a window with more detail including student names.

- Click **Enroll Existing Students** to enroll an existing student into the class or click **Register New Students** to open the *Registration Form* to add a new family and enroll a student in the class. If the class is full you will see CLASS FULL and a **Waitlist** button to click to add a student to the class waitlist. Once the waitlist is also full the button will drop off and you will only see CLASS FULL.

- When the *Show Students* checkbox (in the criteria/settings section) is **not** checked private lessons (max size = 1) will display with the enrolled student's name. If *Show Students* is checked the calendar will display the class name and openings information (0) and the enrolled student's name will appear in the class information window that displays when you hover over the class.

- Classes can display color-coded by Category 1 if you assign colors to your Category 1 drop-down values in the *Drop-Down List Editor (Gear icon > Settings > General > Drop-down Lists)*. When darker colors are chosen the text display will change to white. This makes it easy to distinguish between the different types of classes you offer!

6pm	:00		Int Tumbling - Tues 6pm (1)	
	:15			
	:30	Beginner Tumbling (1)	Pointe (1)	
	:45			
7pm	:00	Dolphin - Mon - 7pm (3)	Advanced Tap (3)	Advanced Jazz (0)
		Swim Kids L9 - Mon - 7pm (6)		

Frequently Asked Questions

The Weekly Calendar can be also be accessed from the *Classes (menu) > All Classes.* Click the **Filtered Calendar** (icon) 🗓 and select **Weekly** from the drop-down list. The Weekly Calendar opens in a new window.

Alerts on the Executive Dashboard

The **Alerts** widget on the Executive Dashboard delivers timely notifications on vital information and provides convenient access to related reports at your fingertips.

- ⭐ Stay ahead of the game with real-time alerts that enable you to respond quickly to changing situations.
- ⭐ Delight customers by addressing their needs promptly with insights from the alerts.
- ⭐ Anticipate and address potential problems before they escalate, thanks to early warnings provided by the alerts.

Permissions determine what data your Users can access and what actions they can perform. Before proceeding, review **User Permissions for Alerts on the Executive Dashboard**

Widget Wisdom - Understand and Interact

There are sixteen alerts, split into two categories: actionable and informative. Actionable alerts are displayed by default.

- **Actionable Alerts** - You or your staff can clear actionable alerts by - you guessed it - taking action. For example, to resolve the Waitlists for Classes with Openings alert, click the alert to open the corresponding Waitlists with Openings report. From there, you can access the class record and enroll students from the waitlist, reducing the number of openings reflected in the alert.

- **Informational Alerts** - These alerts, such as 4+ Absences in the last 30 days, remain active and continually update to keep you in the loop rather than disappearing.

The Alerts widget offers various interactive components. Some provide a deeper dive into your data, while others enable customization of your Executive Dashboard display.

1	Collapse or expand the widget.
2	To switch the display to show informative alerts while viewing actionable alerts, click the **View Informative** link.
3	Use the **Move Widget** icon to drag and drop the widget anywhere on your Executive Dashboard to customize your view. Your chosen layout will be retained each time you visit.
4	The alert filters can be used to switch between **Critical Alerts** (red = action needed) and **No Alerts** (green = no action needed). The numbers shown indicate how many actionable alerts require attention and how many do not.

5	All actionable alerts are displayed by default. Each critical alert indicates the number of items that require attention, e.g., four classes that didn't have attendance taken through the Staff Portal. No alerts will always show zero. Click on an alert to open the corresponding report.
6	When you have applied an alert filter (#4 above), you can change your display by using the **View All** or **Reset** options.
7	To switch the display to show actionable alerts while viewing informative alerts, click the **View Actionable** link.
8	All informative alerts. Each alert indicates the number of instances related to its subject, e.g., five scheduled tasks set to occur in the next 30 days. Click on an alert to open the corresponding report.

Expand each section to learn about the various alerts.

Expand/Collapse All

⌄ Actionable Alerts (8)

⌄ Informational Alerts (8)

Revenue Summary on the Executive Dashboard

Bar charts in the **Revenue Summary** widget display revenue information visually. The revenue amount on the charts is total revenue after discounts and refunds have been subtracted. It includes taxes.

⭐ Gain quick insight into the financial health of your business.
⭐ Make informed decisions based on historical revenue trends.
⭐ Track the financial performance of your facility over time.

Permissions control your Users' ability to see certain data and take specific actions. The Revenue Summary widget requires the *Dashboard-Revenue Summary* permission in the General category.
Learn more about **User Permissions for the Executive Dashboard**.

Widget Wisdom - Understand and Interact

The Revenue Summary widget offers two different views of your earnings over time, giving you options to analyze data in a way that suits you best. This flexibility makes decision-making easier and more personalized.

⊘ Current vs Prior Years Revenue

⊘ 12-Month Trailing Revenue

To Do Tasks on the Executive Dashboard

Use the **To Do Tasks** widget on the Executive Dashboard to assign tasks to any staff member who has a Jackrabbit User ID.

⭐ Improve operational efficiency by effectively managing tasks.
⭐ Ensure that staff are aware of upcoming tasks and deadlines.
⭐ Track task completion and any overdue tasks for all staff in one place.

Permissions determine what data your Users can access and what actions they can perform. The To Do Tasks widget requires the *Assign Tasks* permission in the Tools category. Learn more about **Permissions for Jackrabbit Users**.

Use the Move Widget icon to drag and drop the widget anywhere on your Executive Dashboard to customize your view. Your chosen layout will be retained each time you visit. Collapse or expand the widget using the ⊖ or ⊕ next to To Do Tasks.

Add and Assign a Task

1. In the To Do Tasks widget, click **Add Task**.

2. Complete the information in the Add Task window:

   - Enter the **Task Name** and **Due Date**.
   - Click the **Assign To** drop-down menu and use the checkboxes to select one or more Jackrabbit Users to whom you want to assign the task. Use the **Assign to All Users** checkbox to assign the task to all Users in your system.
   - Add **Notes** if needed.

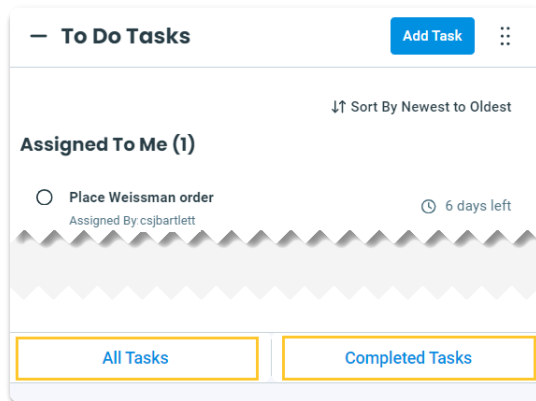3. Click **Add**. The task will now be displayed in the widget under either Assigned to Me or Assigned to Others.

View Tasks

 By default, the To Do Tasks widget displays incomplete Tasks. It shows up to five tasks assigned to you and up to five tasks assigned to others.

Use the options at the bottom of the widget to view more tasks.

- Click **All Tasks** at the bottom of the To Do Tasks widget to view all incomplete tasks. Optionally, sort and filter the tasks by those assigned to you and those assigned to others. A link is provided to switch the view to completed tasks.

- Click **Completed Tasks** at the bottom of the widget to view all tasks that have been marked completed. A link is provided to hide the completed tasks and switch back to all tasks.

Mark a Task Complete

There are two ways to mark a task complete and move it from the All Tasks (incomplete) section to the Completed Tasks section.

- Select the empty circle to the left of a task name to mark it complete.
- Click on a task to open the Edit Task window. Select the **Mark Completed** checkbox and click **Save**.

Edit or Delete a Task

To modify or delete an incomplete task, click on the task to open the Edit Task window. Make any required adjustments, and then either click **Save** to preserve the changes or select **Delete** to remove the task entirely.

Aged Accounts on the Executive Dashboard

The **Aged Accounts** widget on the Executive Dashboard provides a breakdown of all of your customers' unpaid fees divided into time buckets (aka aging groups) for 0-30 days, 31-60 days, 61-90 days, and >90 days. Fees begin to age from their transaction date.

⭐ View overall account performance at a glance.

⭐ Prioritize collection efforts.

⭐ Strengthen customer relationships; engage proactively with customers who may be experiencing difficulties.

Permissions determine what data your Users can access and what actions they can perform. Before proceeding, review **User Permissions for Aged Accounts on the Executive Dashboard**

⊘ Customize Your Aged Accounts Widget

⊘ Widget Wisdom - Understand and Interact

Key Metrics on the Executive Dashboard

The **Key Metrics** widget on the Executive Dashboard offers a quick view of enrollment and registration information. Each metric links to a detailed report.

⭐ Identify areas that need attention at a glance.

⭐ Get instant insights into enrollment and registration trends.

⭐ Make informed decisions with detailed linked reports.

Permissions determine what data your Users can access and what actions they can perform. Before proceeding, review **User Permissions for Key Metrics on the Executive Dashboard**

Customize Your Key Metrics Widget

To customize Key Metrics, click the **Dashboard Settings** button at the top of the Executive Dashboard.
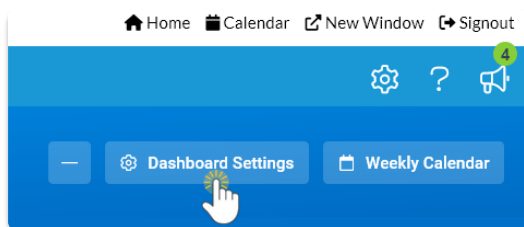
The Dashboard Settings have three sections related to the Key Metrics: Enrollments, Drops, and Registrations.

⊙ Enrollments & Drops

⊙ Registrations

Widget Wisdom - Understand and Interact

The Key Metric widget offers various interactive components. Some provide a deeper dive into your data, while others enable customization of your Executive Dashboard display.
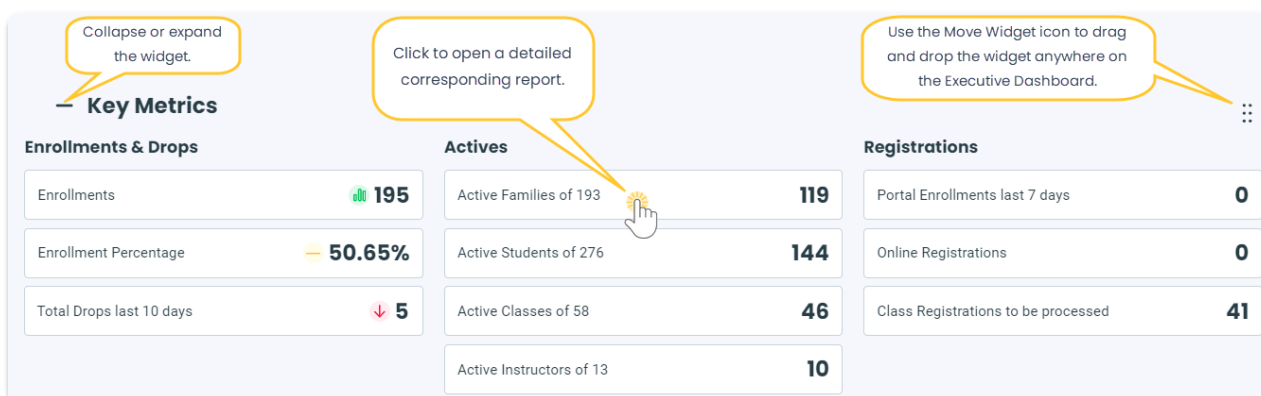
- Click on any metric to open the corresponding report; for example, click on **Active Families of ##** to open the List Active Families report or select the **Class Registrations to be processed** metric to open the Process Class Registrations report.

   The choices you make in the Dashboard Settings filter the reports you access through the Executive Dashboard. For example, if you set the *Total Drops in the Last X days* to 10, clicking on the Total Drops last 10 days metric will show a report reflecting drops from the last 10 days.

- Hover over the **Enrollments** metric to reveal two links:
  - View Enrollments opens the Enrollment Snapshot 1 report.
  - View Category 1 Chart opens a chart showing Category 1 enrollments.

- Collapse or expand the widget using the ⊖ or ⊕ next to Key Metrics.
- Use the **Move Widget** icon to drag and drop the widget anywhere on your Executive Dashboard to customize your view. Your chosen layout will be retained each time you visit.

Announcements on the Executive Dashboard

The **Internal Announcements** widget on the Executive Dashboard allows you to share information with your Jackrabbit Users. These announcements are visible to Users when they visit the Executive Dashboard.

⭐ Share messages with your Users, similar to posting notes on a bulletin board.
⭐ Help your Users remember important information; they'll see your announcements every time they visit the Executive Dashboard.
⭐ Encourage your team with fun and uplifting quotes or images.

Permissions control your Users' ability to see certain data and take specific actions. The Internal Announcements widget requires the *Edit Settings, Logo, Announcements* permission in the Tools category. Learn more about **Permissions for Jackrabbit Users**.

Use the Move Widget icon to drag and drop the widget anywhere on your Executive Dashboard to customize your view. Your chosen layout will be retained each time you visit. Collapse or expand the widget using the ⊖ or ⊕ next to Internal Announcements.

⊙ Add or Edit an Announcement

⊙ Delete an Announcement

Keep up with Enhancements on the Executive Dashboard

Jackrabbit is committed to providing the best in class application for your business. We are continually creating enhancements and making updates. As the releases roll out you can find the latest enhancements, listed by release date, in a few different places on the Executive Dashboard:

- The *Enhancements* section of the *Executive Dashboard*
- The *Gear (icon) > Recent Enhancements*

Recent Enhancements

← RETURN

View 1 - 50 of 500 |◄ ◄◄ Page 1 of 10 ►► ►| 50 ▼   + Show All   🖨 Print   ⧉ Export   ⟳ Refresh

	Date	Enhancement	Description
1	1/6/2022 9:25:00 AM	Legal Policies: Create Unlimited Policies for Your Business	Policies and Policy Groups are easy to set up and provide you with great flexibility! You can create specific policies for classes, summer camps, competition teams, etc. Follow the 4-step process as outlined in Legal Policies & Policy Groups - An Overview: • Step 1: Create a New Policy • Step 2: Create a Policy Group • Step 3: Assign Policy Groups to Classes • Step 4: Select Parent Portal Settings
2	1/6/2022 9:16:00 AM	Parent Portal: Post Registration Fees	A new menu item located under the *Gear (icon) > Settings > Registration Fees** gives you additional options for registration fees. Now you can post registration fees in the Parent Portal for existing families. In addition, for our clients who use ePayments, you can collect registration fee payme during checkout in the Parent Portal. Refer to Post Registration Fees for more details. **The settings for registration fees defaults to NO. Any existing fee settings have been migrated to this new Registration Fees page.*
3	1/6/2022 9:10:00 AM	Staff Portal: Display Student Disabilities & Immunization Info	Settings have been added to display Student record Disabilities and Immunization information in the Staff Portal. When enabled, the information entered in those displayed in the *Staff Portal > Manage Classes > Attendance > Details*. A red medical icon (hover help) next to a student's name in the Staff Portal indicates the info listed for the student. Refer to General Staff Portal Settings for more information.
4	1/6/2022 9:06:00 AM	Parent Portal: Add Student Resources for Parents	Resources (files and links) can be added to an individual student and viewed in the Parent Portal. This option allows you to provide progress reports, documents, a private information in the secure portal. CLASS EDITION ONLY: Refer to Add a Student Resource to the Parent Portal for additional details.

- The *Resource Center (*Bullhorn icon*) > Latest Enhancements*
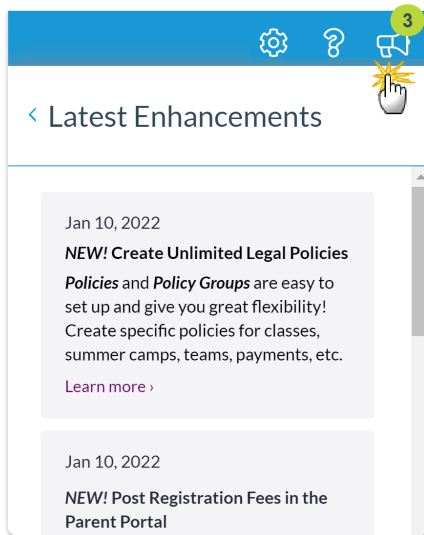
QUIZ - Lesson #1 - The Executive Dashboard

When you have worked through all of the articles outlined in the lesson, select the Take the Quiz button to be taken to the Lesson #1 Quiz where you can test your understanding of the concepts in this lesson. You will be asked to enter an email address for quiz results to be sent. The quiz includes Review questions.

Quiz #1 - The Executive Dashboard

Number of Questions	Total Possible Points	Points Needed for an "A"	Points Needed for a "B"	Points Needed for a "C"
11	11	9	8	7

⊙ **Return to Supervisors and Managers Menu to continue to next lesson**

⊙ **Click here to provide feedback for this lesson**