

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 Activity Calendar - Classes & Events

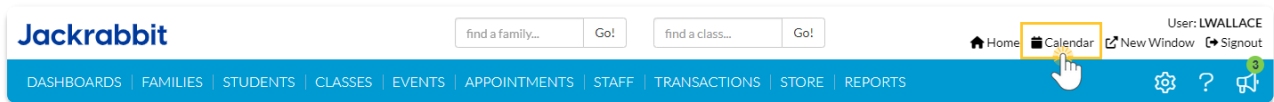
Jackrabbit's **Activity Calendar** is designed to streamline your scheduling process, providing a centralized solution for managing activities with greater efficiency and clarity across your organization.

- ★ Manage your classes, events, and appointments in one place, which helps you organize your operations and prevent scheduling conflicts.
- ★ Avoid double-booking with a clear view of activities and real-time staff availability, saving time and reducing errors.
- ★ Customize your calendar with filters and flexible views, including side-by-side or stacked, and options to display by week, day, room, instructor, or in an agenda format.



Permissions determine what data your Users can access and what actions they can perform. Before proceeding, review [User Permissions for the Activity Calendar](#).

To access the Activity Calendar, use the  **Calendar** link at the top right of all pages in Jackrabbit.



**Expand/Collapse
All**

- ▢ [Activity Calendar Settings](#)
- ▢ [Get to Know Your Activity Calendar](#)
- ▢ [Calendar View Options \(Week, Day, Agenda, Room, and Instructor\)](#)

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](#)

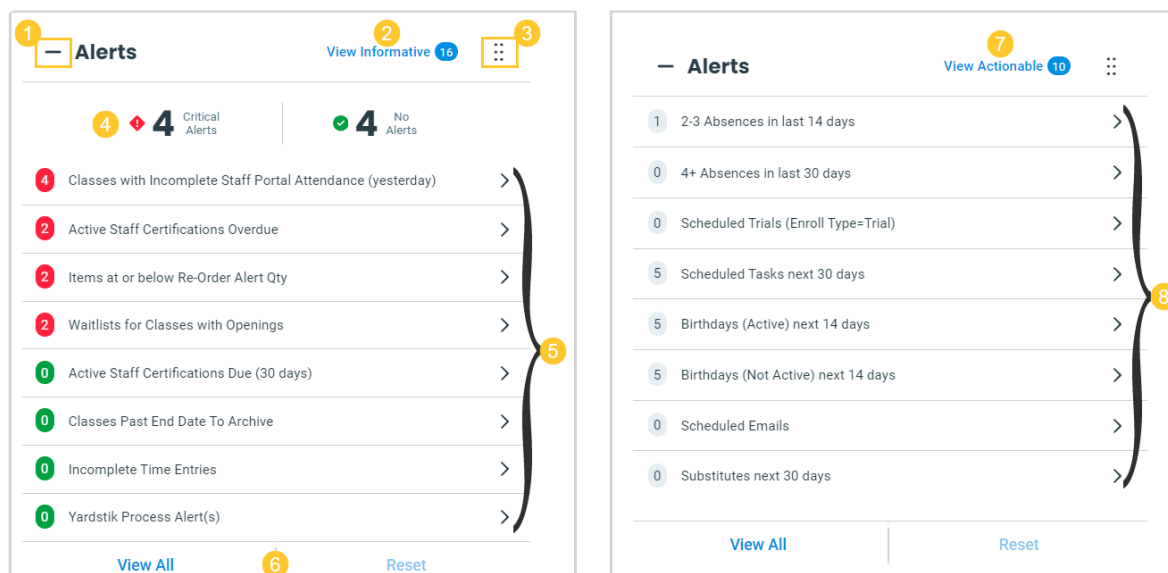
Widget Wisdom - Understand and Interact

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.

- **Informative 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 By default, all actionable alerts are displayed. 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 applying an alert filter (#4 above), use the **View All** or **Reset** options to change your display.
- 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/Collapse
All

Expand each section to learn about the various alerts.

▢ Actionable Alerts (8)

▢ Informative 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 with 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](#).

To Do Tasks Add Task

Collapse or expand the widget.

Use the Move Widget icon to move the widget anywhere on the Executive Dashboard.

Assigned To Me (1) Sort By Newest to Oldest

- Place Weissman order Assigned By: helpcenter 6 days left

Assigned To Others (3)

- Clean break room Assigned To: NTownsend 1 WEEK AGO
- Send closure notice Assigned To: ebarnhardt 6 days left
- Archive classes Assigned To: Iwallace 4/30/2024

All Tasks Completed Tasks



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:
 - o Enter the **Task Name** and **Due Date**.

- o 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.
 - o 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. The Aged Accounts widget requires the *Dashboard - Aged Accounts* permission in the General category and the *Aged Accounts Summary* permission in the Reports category. Learn more about [Permissions for Jackrabbit Users](#).

▢ [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.

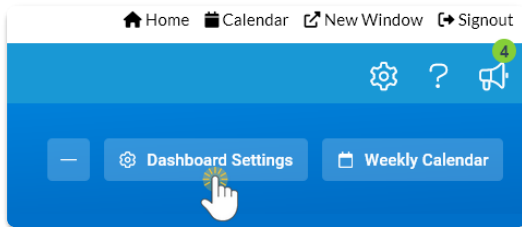
- ★ Get instant insights into enrollment and registration trends.
- ★ Make informed decisions with detailed linked reports.



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.

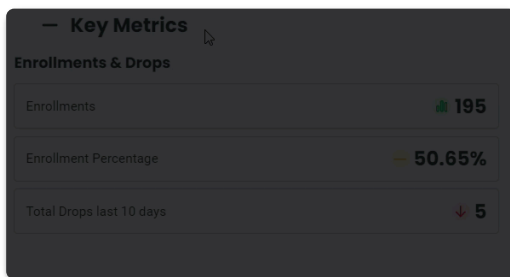
Key Metrics		
Enrollments & Drops	Actives	Registrations
Enrollments ▲ 195	Active Families of 193 ☀ 119	Portal Enrollments last 7 days 0
Enrollment Percentage ▬ 50.65%	Active Students of 276 144	Online Registrations 0
Total Drops last 10 days ▼ 5	Active Classes of 58 46	Class Registrations to be processed 41
	Active Instructors of 13 10	

- 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.



Your choices 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.

Internal 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 \ominus or \oplus next to Internal Announcements.

▢ [Add or Edit an Announcement](#)

▢ [Delete an Announcement](#)

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

TAKE THE QUIZ

Number of Questions	Total Possible Points	Points Needed for an "A"	Points Needed for a "B"	Points Needed for a "C"
9	9	8	7	6

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