iSEEK User Guide

Manage Users

- Users can belong to one or more groups.
- Only Administrators can manage users and groups.
- Administrators are limited in scope to groups they belong to and groups below. They can not see users or groups "above" them.
- All members of a group are notified through the activity stream when new users are added.

Create User

1. On the Homepage, Go to the top where it says **Admin** and in the dropdown menu click **Users.**
    a. Now that you are on the **User Page** you will click the green **Create User** button on the right side of your screen.
    b. A window will pop up that requires you to type in your Username (Email address) then click **Next**.
    c. You will then fill out the required fields on the form provided (**Role** refers to the accounts ability (admin or user)), then save.
    d. Your new user/admin should appear in your group.

Note: An admin can also create a user by selecting "User" under the "Create" menu.

Create Group and User

1. On the Homepage, Go to the top where it says **Admin** and in the dropdown menu click **Groups.**
2. Now that you are on the **Group Page** you will click the green **Create Group** button on the right side of your screen.
3. You will be prompted to type in the name of the group you would like to create then click **Create**.
4. Once your group is created you can then create a new user.
5. On the **Group** Page, click on the green **Create User** button on the bottom right of the page.
6. Input the user name you would like to create then click **Next**.
7. You will then be prompted to fill out the required fields in the form (**Role** refers to the accounts ability (admin or user)), then save.
8. Your new user/admin should appear in your group.

Batch Importing Features

- Select a group to import the users into.
- Automatic "welcome" email to each of the new users containing their password.

- Supports a comma-delimited list of users, pasted into a text area.
- Delimited list is validated and displayed in a table format.
    - Validation errors are displayed in red.
    - Hovering the mouse over "Show Errors" displays a detailed list of errors for each record.
    - Errors can be corrected by removing invalid records or by correcting each invalid field by clicking to edit.
- Batch import supports linking new Supercruncher users to existing Vantage SSO accounts.

Comma-Delimited Format

Field	Required?	Length	Default	Description
Username/Email	Yes	5-60		User's username, which must be an email address.
First Name	Yes	1-60		User's first name.
Last Name	Yes	1-60		User's last name.
Password	Yes	5-60		User's password.
Role	Yes	admin or user	user	User's privileges within the application. admin = Reporting Administrator user = Reporting User

If username matches an existing Vantage SSO account, then the password is not required and will be ignored. When an existing SSO account is detected, "Valid (SSO)" will appear under the Status column.

Dataverse

Dataverse Overview

Not only can your Dataverse consume disaggregate data, but it can also bring your data to life! By clicking into a Dataview the user is able to view the time in which the data was updated and the number of records that reside in it.

Accessing Dataviews (Dataverse Page)

There are two ways a user can access their Dataviews from the home screen:

1. Use the quick links on the activity stream page to the right of their screen when first logging in.
2. Hover over the "Dataverse" menu at the top of the page and select most recent dataviews visited.

From the **"Dataverse"** page, users can easily see all created and shared dataviews that they have access to. The user may organize their Dataviews using the menu bar at the top of their screen to filter and organize their Dataverse.

Dataviews: Allows users to view all dataviews and datasets that they have created or that have been shared to them.

Datasets: Allows users to only view datasets that they have created. All other dataviews that have been shared to them will be filtered out.

Other Options: Users have the ability to filter their Dataverse further by clicking the **Favorites, Shared to me, and Shared by me** options.

*A user may have multiple Dataviews in their accounts with 1 main dataset. The dataset can be sliced and diced into smaller sets for data that only corresponds to your specific filters. A user can then save these new sets as a different Dataview. Most users consider a Dataview to be static data at one point in time, but iSEEKsc allows the user to view multiple slices of data which are more or less live and current.

Dataviews

Change Dataview Name: To change the Dataview name click the small black arrow next to the current name and select "Edit Dataview Name". The user may then change the name of their Dataview and click the green checkmark when done.

*iSEEKsc provides an "auto alert" when there are unsaved changes that were made.

Find iView: The Find iView button allows the user to find a field within a large Dataview which would make it difficult to find otherwise. The user can either choose from the list or use the search feature. Once the iView is click, iSEEKsc highlights the corresponding box and brings the user right to it.

The sprocket menu at the top of the Dataview has many useful features within it like:

- **Edit Search Fields:** This feature allows a user to organize the iViews in their Dataviews, and apply additional formatting to the fields.
- **Create Table or Chart:** Launches the Table/Chart Editor to create new tables and charts
- **Create Results View:** Allows the user to create smaller views of the "Results Section"
- ***Create Nibble:** Allows a user to create a smaller slice of their data that can be accessed by anyone. *Advanced feature
- **Add/Remove Permissions:** Allows the user to add or remove permissions to access the data.
- **Share:** Allows the user to share the dataview quickly and easily.

- **Condensed display:** This functionality condenses the iViews on the screen to take up less space to view all iViews on one page.

Tabs

When a user has a large Dataview with many different iViews it might be difficult to make certain selections. This is why iSEEKsc allows the user to organize and compartmentalize their iViews into different tabs. To create a Tab:

1. Access the Sprocket Menu at the top right of your Dataview and select "Edit Search Fields"
2. A new window will appear with a list of fields available within the Dataview on the right and in some cases a list of fields not queried in the Dataview on the left.
3. Select the green button "Create New Tab"
   a. You may then click and drag new fields into this tab. You can use the Ctrl button to select individual fields, or Shift to select an entire group of fields.
   b. After adding your fields in to the appropriate tabs we recommend that the user copy their changes to their results and save their changes.

The number of tabs that can be created are unlimited.

Filters

After consuming lots of data and linking multiple datasets together one of the best features of iSEEK is the empowerment it gives to users to interact with large amounts of data easily, comfortably, and quickly in essence making their data come alive.

There are 3 types of filters:

1. Text/ Listed Values: Represented by a list of results for the given filter.
2. Numeric Slider/ Sparklines: The user has a choice to have a numeric filter with just a slider or sparklines which show the density of your data in a given numeric range.
3. Date Filter: The user can filter within a specific or relative date range.

Filters are represented by a box of data which are called iViews. Each filter provides a default of 25 results for listed values. Simply click on one of the results in your filter and watch how your data dynamically filters the number of records in your Dataview. You can now see a filter selection pop up at the top of your Dataview. **To remove a selected filter**, you can either use the "Reset" button at the top of your Dataview, or simply select the "X" next to your filter selection.

Missing Values: Marked by a "Ø" icon this functionality of a filter will allow a user to view only the records that have a missing value for the specific iView. You will see the icon change once it has been selected. This new icon will allow you to view only the records that do not have a missing value. To remove either of these filters you must remove the filter selection from the top of the Dataview.

More: Marked by a "**+**" icon this functionality of the filter will allow a user to view all possible selections within the listed value iView. A user may chose to include or exclude specific results in their selections and save their changes. The filter selection will appear at the top of your Dataview.

Quick Graph: Marked by a simple graph icon which provides an immediate graphical representation of your data in an iView.

Trailing 12 month Filter

The relative date field has been updated so that in addition to last 30, 60, 90 days I can enter any last days (365 for trailing 12 months, 10 days, 14 days, etc.)

Search

Another powerful way for users to interact with their data is by using the Search technology embedded in iSEEK Supercruncher. The search empowers a user to search for a specific data element within a single dimension or multiple dimensions. By using the search technology this allows the user to query their entire database to move closer closer to what they are looking for. They can then us the filters to refine their search further.

Find

The find feature empowers the user to search not one within a specific dataset, but to find data elements within their entire account. This is not like the search feature where a user can query their data, but it helps them find where their data resides within a dataset, tables/charts, templates or Dataviews.

Filters

For a user to customize their filters they can click the sprocket at the top of their Dataview and select "Edit Search Fields". From here a user can:

- Organize iViews: The user is able to add or remove iViews from their Dataview, or organize them in separate tabs.
- Change Display Settings
  - Sparklines
  - Numeric Ranges
  - Apply Formatting
    - Number, Percentage Currency
    - Truncate, Round, add thousands separator

Sharing Data

There are three types of data sharing:

Edit Permissions:

1. Full Access (High Level) Share: Grants the right to view and interact with all of data. A user will have the ability to save filters, create tables /charts, and dashboards.
2. Limited (Mid Level) Share: Grants the right to view only the subset of data they are authorized to view. A user will have the ability to save filters, create tables/charts, and dashboards.

Share Current View:

1. Read-Only (Low Level) Share: Only grant the right to view a subset of the data the user is authorized to view without any other functionality. Limit the time someone can view the subset of data to days, weeks, months, and years.

Tables and Charts

After a user has been able to see deeper into their data they have the ability to create tables and charts to show a graphical representation of that data. There are two ways to start creating a table or chart:

1. Use the sprocket at the top of your data filters and select "Create Table/Chart". From here a user has the ability to select from a variety of different chart types or to create a table.
2. Green Create Button just above the results section. Once a user click this button they will again be given the option to select from a variety of different chart types or a table.]
3.

When creating tables and charts iSEEK Supercruncher uses a drag and drop interface to make it quick and easy for users to create them. There are a few general guidelines to follow:

The X axis is generally for Search fields or iViews. There will be a list of fields to select from on the left hand side of your screen. Once you have found the iView you are looking for simple click and drag it to the x-axis. The Y axis is for numeric fields or metrics. Metrics are pre-calculated using the data within a given iView. When a user clicks on an iView in the creation window they will see a list of Basic Metrics appear such as Count, Distinct Count, Share of Count, Share of Total, Standard Deviation, Average, Total, Maximum and Minimum.

Record Limit; There is a default number of records that can be loaded for each type of table or chart. Limit your records when there is too much to view, or you are trying to refine your records to the top 10 or bottom 10 etc.

Filter/Group-by: This piece of functionality helps set up the "cycle" filter. Ex. You would like to see the average scores for each test taken this year, but there are multiple schools in your district taking the same named exams. You can you the Group-by filter to see the average score by assessment by school. By clicking the side arrows you can filter through the individual schools in your district to view the data assocciated to it.

Y limits: Set you y maximum and y minimum limits to stretch or shrink the range of data you see. This can help put you chart into perspective.

Benchmark: This allows a user to input a static value that puts a line across the table or chart, indicating if the value has been reached or not.

Combination Charts

A combination chart empowers the user to graph two data elements on the same graph. It is effectively used for comparison purposes. For example, a combination graph is recommended to graphically display:

1. **Business:** Goal revenue vs. Actual revenue by month
2. **K-12:** Total Absences vs. Unexcused Absences; or Average Math Test Scores vs. Average English Test Scores; or Writing Scores vs. Total Absences; etc.
3. **Higher Ed:** Total Revenue vs. Total Expenses
4. **Finance:** Max open vs Total Volume

The first data element plotted in a combination chart appears as a bar chart; the second (and subsequent) appear as line graphs. All standard features apply to a combination chart including the ability to apply a series, a filter, customize the Y-axis and include a benchmark.

Dual Y-axis Combination Charts

This chart is similar to a combination chart (above); however, it differs to the extent that you can apply two different Y-axis scales. It is recommended when you are graphing multiple data elements that have a significant different scales. For example:

1. **Business:** Total sales vs. Total Revenue by month
2. **K-12:** Total number of tests taken (which may range from 1,000 – 10,000) vs. Average Math Test Scores (which may range from 0-100)
3. **Higher Education:** Total Expenses vs Total Enrolled at the University or Total Number of Students who Applied vs. Total Number of Students Accepted
4. **Finance:** Max open vs yield %

Higher Education: Total amount of content aligned to objectives across the curriculum vs. Average Student Test Score for each objective

All standard features are available with the Dual Y-Axis Combination Chart. As a user, you can apply a customized Y-axis (to the right and left), enter a benchmark, add a series (to one of both of the data elements in the graph), and filter by any field.

Scatter plot

A Scatter plot is used to plot data points on a horizontal and a vertical axis in the attempt to show how much one variable is affected by another. Each row in the data table is represented by a marker whose position depends on its values in the columns set on the X- and Y-axes. Multiple scales can be used on the Y-axis to when you want to compare several markers with significantly different value ranges.

Gauges

Gauges make for great gadgets on the dashboard. Users can publish key data metrics as a thermometer, linear/angular gauges as well as many other interesting, eye-catching gauges. Creating a gauge is easy and users have all standard options available such as filtering and applying a benchmark. Below are few examples of gauges:

- Total number of tests delivered
- Average writing scores compared to the proficiency benchmark

Nibble

A nibble is an enhanced feature that empowers users to publish specific, discrete pieces of critical data extraneously to the application by embedding the nibble in an email, on the desktop, in a dashboard, within a website or other location. It is as is "one-feature, one-button" tool. Users that have purchased this advanced feature can data mine through thousands or millions or records and, tap the nibble to find the discrete slice of data most important to you. Key points:.

- Nibbles are easily configured from an existing iSEEKsc data sets
- Nibbles can be published anywhere and viewed without any need to log into the system. Nibbles display as a simple button and produce important, real time data

Examples:

1. Business: Top performing reps
2. K-12: Students with the most Absences
3. Higher Ed: Student picking a college (SAT score, sports involvement, public/private)
4. Finance: Performance of a stock
5. K-12: Intervention Required for the following students
6. K-12: Students at Risk of Drop Out Due to Excessive Disciplinary Actions
7. Higher Education: Top 10 Best Performing Students (or Schools)

Content Browser

This Content Browser is an enhanced feature that allows you to view, interact with, touch, edit and identify with all of your data sets comprehensively and contemporaneously on a single screen.

- Home page: users can optionally set this as their home screen
- List view: users can toggle from the browser view to the list view
- All inclusive: content includes tables, charts, results views, web content gadgets
- Interactive: clicking on an icon expands the data to full screen
- Options: from the content browser, users can delete, edit, post to dashboard, export, etc
- Custom View: users can click and drag one or more objects on the content browser to an existing or new dashboard.

Automated FTP Data Import

The data loading process has been enhanced to automatically crawl a pre-existing SFTP site for newly posted data and load it directly into iSEEK Supercruncher.

Automated Data Transfer to FTP

Intelligent Agents have been enhanced to not only to send a data export via email, but an IA can exported the data automatically and post it to a pre-established SFTP site.

Custom Reorder

Access the Setup menu at the top of your screen and click datasets.

Select the dataset you would like to custom reorder the column values

Click the sprocket for the columns settings

Scroll to the column you would like to reorder the values for and click the "list" icon

A window will appear with all the values for the field you selected. Reorder the values in sequential, numerical, or alphabetical order and click save.

Note: the "x" will hide the value and move it to the bottom of the list in default order. Click reset order to make these fields reappear.

Look-up Table

Access the Setup menu at the top of your screen and click datasets.

Select the dataset you would like to create a column look-up table for

Click the sprocket for the columns settings

Scroll to your desired column and click the icon that looks like two crossing arrows.

The user can now convert individual values in the column or input an entire list of values.

Note: Once values are converted (numeric or text) the field will be reformatted as text. The table can be edited if the values should change.

Generated Columns

Access the Setup menu at the top of your screen and click datasets.

Select the dataset you would like generate a custom column value for.

Click the sprocket for the columns settings

Scroll to the bottom of the screen where you see "Generated Columns" section and select "Add New Generated Columns".

There will be three types of columns to generate:

Predicted: This column can be generated once you have create a training model to predict values based on historical data.

Web Service: This generated column allows you to retrieve realtime data from a webservice behind and even hind a username and password. You will be provided a form to specify how you would like the data to be retrieved.

Custom Expression: This generated column allows you to apply algorithms or formulas to your existing data fields and place them into your dataview to be filtered.

Machine to Machine Connection (M2MC)

SC Part:

Create a results view and save

Access your results view in the related tables and charts section and click the "V" and select Enable API

An icon will appear at the top left of your results view and at the bottom right of the thumbnail.

By clicking on the icon a window will appear with a url connection to the api. Copy this link and use it to connect to a number of different applications and machines.

Excel Example:

Open a new excel document and click "Import data from text" from here you can click add. You will copy and paste the link from iSEEKsc into the filed.

Setup your preferences for the data and where you would like it to populate.

Note: Save the data as comma delimited and default save it in the first worksheet.

Click refresh in the top toolbar and watch your data automatically populate in the specified fields.

Note: The user can also set an automatic refresh rate to keep the data update in the document.

Actionable Links

Access the Setup menu at the top of your screen and click datasets.

Select the dataset you would like to change the column values to actionable likes.

Click the sprocket next to Columns and Settings

Find the column you would like to add an actionable like to and click the icon with the circle and arrow.

A window will appear for you to add a web location and a place to add a column placeholder to input the values of that field.

Save all changes. Your dataview should now be populated with actionable links.