**E-Milestones Tracker**

The **E-Milestones Tracker**is one of the core reports used by the Programs teams across all regions. Its main purpose is to highlight the progress students have made towards completing employability milestones throughout their time at Bottom Line.

The dashboard contains 4 main Navigation components:

1. [Quick Slicer Menu](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/E-Milestones-Tracker.aspx#quick-slicer-menu)
2. [Expanded Slicer Menu](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/E-Milestones-Tracker.aspx#expanded-slicer-menu)
3. [Cards - including toggles](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/E-Milestones-Tracker.aspx#cards-toggles)
4. [Table Views](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/E-Milestones-Tracker.aspx#table-view)

The Data Elements featured are:

1. [Student Name](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/E-Milestones-Tracker.aspx#student-name)
2. [Student Phone Number and Preferred Email](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/E-Milestones-Tracker.aspx#preferred-phone-number-and-email)
3. [Total Cumulative Credits Earned](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/E-Milestones-Tracker.aspx#total-cumulative-credits-earned)
4. [E-Milestones Completed this Year](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/E-Milestones-Tracker.aspx#e-milestones-completed-this-year)
5. [Total E-Milestones completed](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/E-Milestones-Tracker.aspx#total-e-milestones-completed)
6. [Total CREs Completed](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/E-Milestones-Tracker.aspx#total-cres-completed)
7. [The 12 individual Employability Milestones](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/E-Milestones-Tracker.aspx#employability-milestones)
8. [Advisor Name](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/E-Milestones-Tracker.aspx#advisor-name)

A video guide will be released soon! Make sure to come back and watch it to learn more about how to best use this tool

The E-Milestones Tracker dashboard as seen in the Success Advisor Data Power BI app

**Navigation**

**Quick Slicer Menu**

* **Definition**: The Quick slicer menu is a report element that allows you to view up to 9 different filtering options for navigation within the dashboard's main page
* **Purpose:**Allows us to filter (slice) the data by a variety of options, such as a student's name, enrollment status, etc. Unlike the Expanded slicer menu, the Quick slicer menu makes the most relevant/most frequently used slicers easier to access within the report​​​​​​​
* **Example:​​​​​​​**​​​​​​​

Example of Quick slicer menu options featured in the Success Advisor Caseload dashboard (actual menu in this dashboard might be different)

**Expanded Slicer Menu**

* **Definition**: The Expanded slicer menu is a report element that allows you to view a complete list of all the different reporting options
* **Purpose:**Allows us to filter (slice) the data by a variety of options such as a student's name, enrollment status, etc. Unlike the Main slicer menu, the Expanded slicer menu offers more options for filtering the data and allows the user to further customize their report beyond the 9 slicers previewed in the Quick slicer menu​​​​​​​
* **Example:**

**​​​​​​​**

To access the Expanded slicer menu, click the "More" button located in the bottom-right corner of the Quick slicer menu. The Expanded menu includes additional filtering options beyond the Quick menu's offerings (actual extended menu in this dashboard might be different)

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**Cards & Toggles**

* **Definition**: Cards are a report element that highlight summarized data. Toggles are report elements that allow us to "switch" between different tables or visualizations depending on specific conditions
* **Purpose:**Allows us to quickly visualize key information (i.e. total # of students in a certain category) ​​​​​​​
* **Example:​​​​​​​**

The E-Milestones Tracker Dashboard shows the same three cards regardless of the view. Displayed data is reflective of the current state

**Table View**

* **Definition**: The Table View is a visual representation of student data
* **Purpose:**Allows us to see a by-name list of students and their relevant data​​​​​​​
* **Example:​​​​​​​**​​​​​​​

This dashboard shows two table views depending on your choice in the toggle. This image shows an example of the "By Year" table view, which will feature all the E-milestones organized by their year sequence

This dashboard shows two table views depending on your choice in the toggle. This image shows an example of the "By Category" table view, which will feature all the E-milestones organized by their category sequence

**Data Elements**

**Student Name**

* **Definition**: The legal first and last name of a student, as it is captured during the intake process
* **Why do we need it?**to be able to identify our students and assign them to caseloads ​​​​​​​
* **Where do I enter this information?**This data point is captured during Intake and, generally speaking, should not change once the student is enrolled in the Success Program. If you need to make changes to a student name, please make sure to check out the Salesforce Knowledge Base's section on [Contact Information](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Contact-Info.aspx) **​​​​**​​​​​​​

**Preferred Phone Number and Email**

* **Definition**: The preferred phone number and email for a student, as it is captured during the intake process
* **Why do we need it?**Allows us to communicate with our students through phone calls, text messages, or emails​​
* **Where do I enter this information?**These data points are captured during Intake and can be updated if there are relevant changes to the student's contact information. To learn more about making changes to phone numbers and emails, check out the Salesforce Knowledge Base's section on [Preferred Phones](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Contact-Info.aspx#preferred-phone) and [Preferred Emails](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Contact-Info.aspx#preferred-email)**​​​​**

**Total Cumulative Credits Earned**

* **Definition**: The total amount of credits a student has completed throughout their college tenure. Presented in % form
* **Why do we need it?**A​​​​​​​llows us to track progress towards degree completion​​​​​​​
* **Where do I enter this information?**this is a calculated field. The data used to make this calculation comes from the Critical Data Section in the student's Program Record in Salesforce. It takes into account either the Fall or Spring (whichever is most recent) Cumulative Credits Earned, and divides them by the total number of credits the student needs to graduate. If this field is blank, or your student appears as "Blank" under the Academic Progression slicer, you can correct this by entering the corresponding information into the fields shown below

Enter the Total Cumulative Credits Earned under the Fall/Spring semesters to get the correct % Credits Earned to show on your dashboard

**E-Milestones Completed this Year**

* **Definition**: The total number of employability milestones a student has completed during the current academic year
* **Why do we need it?**Allows us to track any progress made during the *current academic year* towards the overall completion of employability milestones​​​​​​​
* **Where do I enter this information?**Employability milestones are sequential and often build on each other. For this reason, an initial set of e-milestones will be automatically generated for your students when their Salesforce record is first created. To learn more about the E-milestones, their sequence, and how to enter them, consult the Salesforce Knowledge Base's section on [Employability Milestones](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Employability-Milestones.aspx)​​​​​​​[​​​​​​​](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Employability-Milestones.aspx)
* **Data Validations & Logic:**The color-coding for E-Milestones Completed this Year is as follows:
  + Field will be red if E-Milestones Completed this Year is equal to 0 or 1
  + Field will be yellow if E-Milestones Completed this Year is equal to 2
  + Field will be green if E-Milestones Completed this Year is equal to 3 or more

**Total E-Milestones Completed**

* **Definition**: The total number of employability milestones a student has completed throughout their time as a Bottom Line student
* **Why do we need it?**Allows us to track *all* progress made towards the overall completion of employability milestones​​​​​​​
* **Where do I enter this information?**Employability milestones are sequential and often build on each other. For this reason, an initial set of e-milestones will be automatically generated for your students when their Salesforce record is first created. To learn more about the E-milestones, their sequence, and how to enter them, consult the Salesforce Knowledge Base's section on [Employability Milestones](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Employability-Milestones.aspx)**​​​​**​​​​​​​

**Total CREs Completed**

* **Definition**: We define a career-related experience (CRE) in one of two ways: (1) by asking the student, “On a scale of 1-5, how related is this job to your career interests?” Anything 3+ is deemed career-related and we should log in Salesforce to indicate satisfaction of the milestone and (2) by determining as an advisor the answer to "Would this student put this program or role on a tailored resume to apply for jobs in their career field?"
* **Why do we need it?**We believe having career-related experiences during college is key to being career-ready at graduation. Keeping track of CREs in Salesforce allows us to test this theory, as well as to target outreach to students who are not on track to complete 3 CREs by graduation.​​​​​​​
* **Where do I enter this information?**CREs are entered on the Experience tab on a student's profile in Salesforce. To learn more about entering an Experience, consult the Salesforce Knowledge Base's section on [Adding a New Experience](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Experience-Tab.aspx#adding-a-new-experience).**​​​​**​​​​​​​

**Employability Milestones**

* **Definition**: our Employability Milestones are a series of tangible things our students can accomplish on their way to achieving their goal of securing post-college education or employment. There are [15 Employability milestones](https://tbl500amory.sharepoint.com/:w:/s/SuccessProgramCurriculum/ESrW8w0QzkNFhMRqnh9MObIBcZUe6CHyi74437oror4r8g?e=DbMO30) (12 Employability Milestones, plus an additional 3 Career Relevant Experiences) broken into four categories:
  + Career Exploration and Planning
  + [Experience](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Experience-Tab.aspx)
  + Build & Maintain Relationships
  + Job Search Tools
* **Why do we need it?**they allow us to best understand what supports and services we can provide to our students in order to help them secure a stable and mobilizing [First Destination](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Experience-Tab.aspx#first-destination-overview) once they graduate college
* **Where do I enter this information?**Employability milestones are sequential and often build on each other. For this reason, an initial set of e-milestones will be automatically generated for your students when their Salesforce record is first created. To learn more about the E-milestones, their sequence, and how to enter them, consult the Salesforce Knowledge Base's section on [Employability Milestones](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Employability-Milestones.aspx)
* **Data Validations & Logic:**The Symbol-coding for Employability Milestones is as follows:
  + Field will show a checkmark when the corresponding Employability Milestone task has been appropriately labeled as a "Program Required Task" AND the status of the task has been changed to "Completed"
  + Field will show an X otherwise​