**On-Track Projections Dashboard**

The[**On Track Projections Dashboard**](https://app.powerbi.com/groups/me/apps/43578119-a96e-44b0-9099-faad9f3b9f50/reports/4fa566d5-71da-4493-9251-eb106f2514ae/ReportSection6e4ae51278525bdd3818)is one of the core reports used by the Programs teams across all regions. Its main purpose is to help us understand where our students are with their credit accumulation, and how that affects their graduation timeline.

Navigation consists of four main components:

1. [Quick Slicer Menu](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/On-Track-Projections-Dashboard.aspx#quick-slicer-menu)
2. [Extended Slicer Menu](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/On-Track-Projections-Dashboard.aspx#extended-slicer-menu)
3. [Cards & Toggles](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/On-Track-Projections-Dashboard.aspx#cards-toggles)
4. [Table Views](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/On-Track-Projections-Dashboard.aspx#table-views)
5. [Graph View](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/On-Track-Projections-Dashboard.aspx#graph-view)​​​​​​

The Data Elements featured are:

1. [Student Name](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/On-Track-Projections-Dashboard.aspx#student-name)
2. [Stage](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/On-Track-Projections-Dashboard.aspx#stage)
3. [Region](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/On-Track-Projections-Dashboard.aspx#region)
4. [Cohort](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/On-Track-Projections-Dashboard.aspx#cohort)
5. [Program Year](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/On-Track-Projections-Dashboard.aspx#program-year)
6. [Fall/Spring Cumulative Credits Earned](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/On-Track-Projections-Dashboard.aspx#fall-spring-cumulative-credits-earned)
7. [Fall/Spring Cumulative Credits Attempted](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/On-Track-Projections-Dashboard.aspx#fall-spring-cumulative-credits-attempted)
8. [Fall/Spring Credits Earned](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/On-Track-Projections-Dashboard.aspx#fall-spring-credits-earned)
9. [Fall/Spring Credits Attempted](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/On-Track-Projections-Dashboard.aspx#fall-spring-credits-attempted)
10. [Total Credits Earned](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/On-Track-Projections-Dashboard.aspx#total-credits-earned)
11. [Credits Needed to Graduate](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/On-Track-Projections-Dashboard.aspx#credits-needed-to-graduate)

How do we determine each student's projected graduation timeline?

1. [Projected Percent Credits Calculations](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/On-Track-Projections-Dashboard.aspx#projected-percent-credit-calculations)
2. [On Track / Off Track Analysis](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/On-Track-Projections-Dashboard.aspx#on-track-off-track-analysis)

Watch the [Video Tutorial](https://tbl500amory-my.sharepoint.com/personal/mbarton_bottomline_org/_layouts/15/onedrive.aspx?id=/personal/mbarton_bottomline_org/Documents/Recordings/On%20Track%20Dashboard%20Tutorial.mp4&parent=/personal/mbarton_bottomline_org/Documents/Recordings)

The new On Track Projections Dashboard

**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 featured in the On Track Projections Dashboard

**Extended 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:**​​​​​​**​​​​​​​**​​​​​​​**​​​​​​​**

Example of Extended Slicer Menu featured in the On Track Projections Dashboard

**Cards & Toggles**

* **Definition**: Cards and toggles are report elements that highlight summarized data
* **Purpose:**Cards allow us to quickly visualize key information (i.e. total # of students in a certain category), and t​​​​​​​oggles allow us to navigate between different possible cards, tables, or graph views within a report
* **Example:​​​​​​​**​​​​​​​

The On Track Projections dashboard features four cards and two toggles. The cards show total numbers for students served, and total counts for students whose projected graduation timelines fall within 4, 5, or 6+ years.

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This dashboard has two toggles: Current Graduation Track and Extra Credit Projections. This example shows the dashboard displaying "Current Graduation Track"

This dashboard has two toggles: Current Graduation Track and Extra Credit Projections. This example shows the dashboard displaying "Extra Credit Projections"

**Table Views**

* **Definition**: The Table Views are a visual representation of student data
* **Purpose:**Table views often allow us to see a by-name list of students and their relevant data​. These views can also display summarized or aggregated data, depending on the dashboard or the data point(s) being represented​​​​​​
* **Example:**

The "Current Graduation Track" toggle shows a table view that displays students' credit accumulation history for the current academic year, and their projected graduation timeline based on these numbers

The "Extra Credit Projections" toggle shows a table view that allows users to perform quick calculations to help them determine what effect additional credits would have on a student's potential graduation timeline

**Graph View**

* **Definition**: The Graph View is a visual representation of student distributions
* **Purpose:**Allows us to easily spot trends in student outcomes- in this case, it allows to identify trends in our students' Graduation Track status​​​​
* **Example:**​​​​​​​**​​​​​​​**

The X-axis displays 6 stacked bars organized by cohort year in ascending order (latest to earliest) from left to right. The Y-axis displays the number of students. The graph's legend shows a color-coding based on the Graduation Track Status.

**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) ​​​​​​​**​​​​​​​**

**Stage**

* **Definition**: A student's stage captures where they are in the process of applying to Bottom Line - they may be in the pipeline (e.g. New Applicant), ineligible (e.g. Not Eligible), awaiting information (e.g. Waitlist), or accepted (e.g. Confirmed). The student's stage also helps us track where accepted students are in the process of officially joining the program (Confirmed, Scheduled, or Active.) You can find exact definitions of each stage of the intake process [here](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Student-Recruitment.aspx#student-stages).
* **Why do we need it?**A student's stage gives us a snapshot of where they are in the process and what action or process is next for them. We use Stage to track many of our goals for recruitment, for example, accepted students and overall yield. ​​​​​​​
* **Where do I enter this information?**A student's stage can be modified in the "Overview" section of the student's intake profile. You can find more information in the Knowledge Base [here](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Confirming-Eligibility.aspx#making-a-decision).

**Region**

* **Definition**: a grouping of program site(s) by their corresponding state
* **Why do we need it?**Allows us to easily identify students by the area(s) where they are being served. ​​​​​​​
* **Where do I enter this information?**C **NEED INPUT​​​​​​​**

**Cohort**

* **Definition**: The amount of credits a student has completed towards their degree
* **Why do we need it?**Allows us to calculate a student's academic progression. We use it as the numerator when we calculate % credits earned towards degree​​​​​​​
* **Where do I enter this information?**Total Credits Earned are captured under the college progression section in the student record

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**Program Year**

* **Definition**: The amount of credits a student must complete in order to obtain a degree at the institution they attend
* **Why do we need it?**Allows us to calculate a student's academic progression. We use it as the denominator when we calculate % credits earned towards degree​​​​​​​
* **Where do I enter this information?**College Credits to Graduate are captured under the college progression section in the student record​​​​​​​**​​​​​​​**​​​​​​​

**Fall/Spring Cumulative Credits Earned**

* **Definition**: C
* **Why do we need it?**A​​​​​​​
* **Where do I enter this information?**

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**Fall/Spring Cumulative Credits Attempted**

* **Definition**: C
* **Why do we need it?**A​​​​​​​
* **Where do I enter this information?**

**Fall/Spring Credits Earned**

* **Definition**: C
* **Why do we need it?**A ​​​​​​​
* **Where do I enter this information?**

**​​​​​​​**

**Fall/Spring Credits Attempted**

* **Definition**: C
* **Why do we need it?**A ​​​​​​​
* **Where do I enter this information?**

**​​​​​​​**

**Total Credits Earned**

* **Definition**: The amount of credits a student has completed towards their degree
* **Why do we need it?**Allows us to calculate a student's academic progression. We use it as the numerator when we calculate % credits earned towards degree​​​​​​​
* **Where do I enter this information?**Total Credits Earned are captured under the college progression section in the student record

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**Credits Needed to Graduate**

* **Definition**: The amount of credits a student must complete in order to obtain a degree at the institution they attend
* **Why do we need it?**Allows us to calculate a student's academic progression. We use it as the denominator when we calculate % credits earned towards degree​​​​​​​
* **Where do I enter this information?**College Credits to Graduate are captured under the college progression section in the student record​​​​​​​**​​​​​​​**

**How do we determine each student's Projected Graduation Timeline?**

**Projected Percent Credit Calculations**

To determine how many percent credits a student has earned, we look at the following fields in this order:

* **Total College Credits Needed to Graduate (CC2G)**  
  This is the total number of credits required by the student to graduate the program at their school. This will be the denominator in our calculations. Without this number, we cannot determine what percentage of credits a student has earned. If this field is empty, you will see an automatic 0 (zero) on your dashie. If you find a zero, please update it before you continue. Once we have confirmed that we have a denominator, we look at credits earned.
* **Spring Cumulative Credits Earned (Spring CCE)**  
  These are the total cumulative credits earned by the end of the Spring semester. We start our credit accumulation checks at the end of the academic year by using Spring Cumulative Credits Earned.
* **Spring Cumulative Credits Attempted (Spring CCA)**  
  Spring Cumulative Credits Attempted are the combination of the total cumulative credits attempted until this Spring semester and the number of credits attempted in this Spring semester.
* **Spring Credits Earned (Spring CE)**  
  Spring Credits Earned are the number of credits earned in this Spring semester
* **Spring Credits Attempted (Spring CA)**  
  Spring Credits Attempted are the number of credits attempted in this Spring semester
* **Fall Cumulative Credits Earned (Fall CCE)**  
  These are the total cumulative credits earned by the end of this Fall semester.
* **Fall Cumulative Credits Attempted (Fall CCA)**  
  These are the total cumulative credits attempted by the end of this Fall semester.
* **Fall Credits Earned (Fall CE)**  
  Fall Credits Earned are the number of credits earned in this Fall semester
* **Fall Credits Attempted (Fall CA)**  
  Fall Credits Attempted are the number of credits attempted in this Fall semester
* **Total Credits Earned**  
  Total Credits Earned comes from Salesforce. It is a field, based on last known cumulative credit data

**[5] The logic for these projections are as follows:**

1) Check for College Credits to Graduate  
-if 0 or NULL then 0;  
2) Check Spring CCE  
-if different than 0 and Null then divide by CC2G  
3) Check Spring CCA  
-if different than 0 and Null then divide by CC2G  
4) Check Spring CE + Fall CCE  
-if different than 0 and Null then add them and divide by CC2G  
5) Check Spring CE + Total Credits Earned  
-if different than 0 and Null then add them and divide by CC2G  
6) Check Spring CA + Fall CCE  
-if different than 0 and Null then add them and divide by CC2G  
7) Check Spring CA + Total Credits Earned  
-if different than 0 and Null then add them and divide by CC2G  
8) Check Fall CCE  
-if 0 or Null then 0;  
9) Check Fall CCA  
-if 0 or Null then 0;  
10) Check Fall CE + Total Credits Earned  
-if different than 0 and Null then add them and divide by CC2G  
11) Check Fall CA + Total Credits Earned  
-if different than 0 and Null then add them and divide by CC2G  
12) Check Spring CE  
-if different than 0 and Null then add them and divide by CC2G  
13) Check Spring CA  
-if different than 0 and Null then add them and divide by CC2G  
14) Check Fall CE  
-if different than 0 and Null then add them and divide by CC2G  
15) Check Fall CA  
-if different than 0 and Null then add them and divide by CC2G  
16) Check Total Credits Earned  
-if different than 0 and Null then add them and divide by CC2G

**On- Track/ Off- Track Analysis**

Based on the percent credits calculated by the above formula, the students are marked as **"On Track"** or **"Off Track"**for the projected timeline for graduation for the 4 years, 5 years, or the 6+ years graduation track. The rubric for the same is given below:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Year | Sem | Cum 4 yrs | Cum 5 yrs | Cum 6 yrs |
| 1 | Fall | 12.50 | 10.00 | 8.33 |
| 1 | Spring | 25.00 | 20.00 | 16.67 |
| 2 | Fall | 37.50 | 30.00 | 25.00 |
| 2 | Spring | 50.00 | 40.00 | 33.33 |
| 3 | Fall | 62.50 | 50.00 | 41.67 |
| 3 | Spring | 75.00 | 60.00 | 50.00 |
| 4 | Fall | 87.50 | 70.00 | 58.33 |
| 4 | Spring | 100.00 | 80.00 | 66.67 |
| 5 | Fall |  | 90.00 | 75.00 |
| 5 | Spring |  | 100.00 | 83.33 |
| 6 | Fall |  |  | 91.67 |
| 6 | Spring |  |  | 100.00 |