**Success Hybrid Programming Dashboard**

The **Success Hybrid Programming Dashboard**is a report used by Success Programs teams across all regions. Its main purpose is to help us understand engagement trends and patterns in order to better serve our students.

The dashboard contains 5 main Navigation components:

1. [Quick Slicer Menu](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Success%20Hybrid%20Programming.aspx?xsdata=&sdata=eE1zMnVtOFZTNnJtNlp2WldHVmtBaDdoUEs1OGdLTDJ1ZE9oUHZvOTJFbz0%3D&ovuser=97405bf3-68fc-4681-aa9f-205c2a526573%2cKSordia%40bottomline.org&OR=Teams-HL&CT=1668629563213&clickparams=eyJBcHBOYW1lIjoiVGVhbXMtRGVza3RvcCIsIkFwcFZlcnNpb24iOiIyNy8yMjEwMjgwNzIwMCIsIkhhc0ZlZGVyYXRlZFVzZXIiOmZhbHNlfQ%3D%3D#quick-slicer-menu)
2. [Expanded Slicer Menu](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Success%20Hybrid%20Programming.aspx?xsdata=&sdata=eE1zMnVtOFZTNnJtNlp2WldHVmtBaDdoUEs1OGdLTDJ1ZE9oUHZvOTJFbz0%3D&ovuser=97405bf3-68fc-4681-aa9f-205c2a526573%2cKSordia%40bottomline.org&OR=Teams-HL&CT=1668629563213&clickparams=eyJBcHBOYW1lIjoiVGVhbXMtRGVza3RvcCIsIkFwcFZlcnNpb24iOiIyNy8yMjEwMjgwNzIwMCIsIkhhc0ZlZGVyYXRlZFVzZXIiOmZhbHNlfQ%3D%3D#expanded-slicer-menu)
3. [Fall & Spring Cards](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Success%20Hybrid%20Programming.aspx?xsdata=&sdata=eE1zMnVtOFZTNnJtNlp2WldHVmtBaDdoUEs1OGdLTDJ1ZE9oUHZvOTJFbz0%3D&ovuser=97405bf3-68fc-4681-aa9f-205c2a526573%2cKSordia%40bottomline.org&OR=Teams-HL&CT=1668629563213&clickparams=eyJBcHBOYW1lIjoiVGVhbXMtRGVza3RvcCIsIkFwcFZlcnNpb24iOiIyNy8yMjEwMjgwNzIwMCIsIkhhc0ZlZGVyYXRlZFVzZXIiOmZhbHNlfQ%3D%3D#fall-spring-cards)
4. [Graph Views](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Success%20Hybrid%20Programming.aspx?xsdata=&sdata=eE1zMnVtOFZTNnJtNlp2WldHVmtBaDdoUEs1OGdLTDJ1ZE9oUHZvOTJFbz0%3D&ovuser=97405bf3-68fc-4681-aa9f-205c2a526573%2cKSordia%40bottomline.org&OR=Teams-HL&CT=1668629563213&clickparams=eyJBcHBOYW1lIjoiVGVhbXMtRGVza3RvcCIsIkFwcFZlcnNpb24iOiIyNy8yMjEwMjgwNzIwMCIsIkhhc0ZlZGVyYXRlZFVzZXIiOmZhbHNlfQ%3D%3D#%E2%80%8B%E2%80%8B%E2%80%8B%E2%80%8B%E2%80%8B%E2%80%8B%E2%80%8B%E2%80%8B%E2%80%8B%E2%80%8B%E2%80%8B%E2%80%8B%E2%80%8B%E2%80%8Bgraph-views)
5. [Table Views](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Success%20Hybrid%20Programming.aspx?xsdata=&sdata=eE1zMnVtOFZTNnJtNlp2WldHVmtBaDdoUEs1OGdLTDJ1ZE9oUHZvOTJFbz0%3D&ovuser=97405bf3-68fc-4681-aa9f-205c2a526573%2cKSordia%40bottomline.org&OR=Teams-HL&CT=1668629563213&clickparams=eyJBcHBOYW1lIjoiVGVhbXMtRGVza3RvcCIsIkFwcFZlcnNpb24iOiIyNy8yMjEwMjgwNzIwMCIsIkhhc0ZlZGVyYXRlZFVzZXIiOmZhbHNlfQ%3D%3D#table-views)

There are 6 Key Engagement Metrics featured:

1. [Goal: # of scheduled meetings per week](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Success%20Hybrid%20Programming.aspx?xsdata=&sdata=eE1zMnVtOFZTNnJtNlp2WldHVmtBaDdoUEs1OGdLTDJ1ZE9oUHZvOTJFbz0%3D&ovuser=97405bf3-68fc-4681-aa9f-205c2a526573%2cKSordia%40bottomline.org&OR=Teams-HL&CT=1668629563213&clickparams=eyJBcHBOYW1lIjoiVGVhbXMtRGVza3RvcCIsIkFwcFZlcnNpb24iOiIyNy8yMjEwMjgwNzIwMCIsIkhhc0ZlZGVyYXRlZFVzZXIiOmZhbHNlfQ%3D%3D#goal-schedule-this-of-meetings-per-week)
2. [# Meetings this Week](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Success%20Hybrid%20Programming.aspx?xsdata=&sdata=eE1zMnVtOFZTNnJtNlp2WldHVmtBaDdoUEs1OGdLTDJ1ZE9oUHZvOTJFbz0%3D&ovuser=97405bf3-68fc-4681-aa9f-205c2a526573%2cKSordia%40bottomline.org&OR=Teams-HL&CT=1668629563213&clickparams=eyJBcHBOYW1lIjoiVGVhbXMtRGVza3RvcCIsIkFwcFZlcnNpb24iOiIyNy8yMjEwMjgwNzIwMCIsIkhhc0ZlZGVyYXRlZFVzZXIiOmZhbHNlfQ%3D%3D#meetings-this-week)
3. [# Meetings next Week](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Success%20Hybrid%20Programming.aspx?xsdata=&sdata=eE1zMnVtOFZTNnJtNlp2WldHVmtBaDdoUEs1OGdLTDJ1ZE9oUHZvOTJFbz0%3D&ovuser=97405bf3-68fc-4681-aa9f-205c2a526573%2cKSordia%40bottomline.org&OR=Teams-HL&CT=1668629563213&clickparams=eyJBcHBOYW1lIjoiVGVhbXMtRGVza3RvcCIsIkFwcFZlcnNpb24iOiIyNy8yMjEwMjgwNzIwMCIsIkhhc0ZlZGVyYXRlZFVzZXIiOmZhbHNlfQ%3D%3D#meetings-next-week)
4. [Average Weekly Meetings](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Success%20Hybrid%20Programming.aspx?xsdata=&sdata=eE1zMnVtOFZTNnJtNlp2WldHVmtBaDdoUEs1OGdLTDJ1ZE9oUHZvOTJFbz0%3D&ovuser=97405bf3-68fc-4681-aa9f-205c2a526573%2cKSordia%40bottomline.org&OR=Teams-HL&CT=1668629563213&clickparams=eyJBcHBOYW1lIjoiVGVhbXMtRGVza3RvcCIsIkFwcFZlcnNpb24iOiIyNy8yMjEwMjgwNzIwMCIsIkhhc0ZlZGVyYXRlZFVzZXIiOmZhbHNlfQ%3D%3D#average-weekly-meetings)
5. [Weekly Meetings Needed](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Success%20Hybrid%20Programming.aspx?xsdata=&sdata=eE1zMnVtOFZTNnJtNlp2WldHVmtBaDdoUEs1OGdLTDJ1ZE9oUHZvOTJFbz0%3D&ovuser=97405bf3-68fc-4681-aa9f-205c2a526573%2cKSordia%40bottomline.org&OR=Teams-HL&CT=1668629563213&clickparams=eyJBcHBOYW1lIjoiVGVhbXMtRGVza3RvcCIsIkFwcFZlcnNpb24iOiIyNy8yMjEwMjgwNzIwMCIsIkhhc0ZlZGVyYXRlZFVzZXIiOmZhbHNlfQ%3D%3D#weekly-meetings-needed-to-hit-goal-for-the-semester)
6. [Total Caseload Meetings](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Success%20Hybrid%20Programming.aspx?xsdata=&sdata=eE1zMnVtOFZTNnJtNlp2WldHVmtBaDdoUEs1OGdLTDJ1ZE9oUHZvOTJFbz0%3D&ovuser=97405bf3-68fc-4681-aa9f-205c2a526573%2cKSordia%40bottomline.org&OR=Teams-HL&CT=1668629563213&clickparams=eyJBcHBOYW1lIjoiVGVhbXMtRGVza3RvcCIsIkFwcFZlcnNpb24iOiIyNy8yMjEwMjgwNzIwMCIsIkhhc0ZlZGVyYXRlZFVzZXIiOmZhbHNlfQ%3D%3D#total-caseload-meetings)

The Data Elements featured are:

1. [Student Full Name](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Success%20Hybrid%20Programming.aspx?xsdata=&sdata=eE1zMnVtOFZTNnJtNlp2WldHVmtBaDdoUEs1OGdLTDJ1ZE9oUHZvOTJFbz0%3D&ovuser=97405bf3-68fc-4681-aa9f-205c2a526573%2cKSordia%40bottomline.org&OR=Teams-HL&CT=1668629563213&clickparams=eyJBcHBOYW1lIjoiVGVhbXMtRGVza3RvcCIsIkFwcFZlcnNpb24iOiIyNy8yMjEwMjgwNzIwMCIsIkhhc0ZlZGVyYXRlZFVzZXIiOmZhbHNlfQ%3D%3D#student-full-name)
2. [Meetings date](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Success%20Hybrid%20Programming.aspx?xsdata=&sdata=eE1zMnVtOFZTNnJtNlp2WldHVmtBaDdoUEs1OGdLTDJ1ZE9oUHZvOTJFbz0%3D&ovuser=97405bf3-68fc-4681-aa9f-205c2a526573%2cKSordia%40bottomline.org&OR=Teams-HL&CT=1668629563213&clickparams=eyJBcHBOYW1lIjoiVGVhbXMtRGVza3RvcCIsIkFwcFZlcnNpb24iOiIyNy8yMjEwMjgwNzIwMCIsIkhhc0ZlZGVyYXRlZFVzZXIiOmZhbHNlfQ%3D%3D#meeting-date)
3. [Meeting Method](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Success%20Hybrid%20Programming.aspx?xsdata=&sdata=eE1zMnVtOFZTNnJtNlp2WldHVmtBaDdoUEs1OGdLTDJ1ZE9oUHZvOTJFbz0%3D&ovuser=97405bf3-68fc-4681-aa9f-205c2a526573%2cKSordia%40bottomline.org&OR=Teams-HL&CT=1668629563213&clickparams=eyJBcHBOYW1lIjoiVGVhbXMtRGVza3RvcCIsIkFwcFZlcnNpb24iOiIyNy8yMjEwMjgwNzIwMCIsIkhhc0ZlZGVyYXRlZFVzZXIiOmZhbHNlfQ%3D%3D#meeting-method)
4. [College Attending](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Success%20Hybrid%20Programming.aspx?xsdata=&sdata=eE1zMnVtOFZTNnJtNlp2WldHVmtBaDdoUEs1OGdLTDJ1ZE9oUHZvOTJFbz0%3D&ovuser=97405bf3-68fc-4681-aa9f-205c2a526573%2cKSordia%40bottomline.org&OR=Teams-HL&CT=1668629563213&clickparams=eyJBcHBOYW1lIjoiVGVhbXMtRGVza3RvcCIsIkFwcFZlcnNpb24iOiIyNy8yMjEwMjgwNzIwMCIsIkhhc0ZlZGVyYXRlZFVzZXIiOmZhbHNlfQ%3D%3D#college-attending)
5. [Program Year](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Success%20Hybrid%20Programming.aspx?xsdata=&sdata=eE1zMnVtOFZTNnJtNlp2WldHVmtBaDdoUEs1OGdLTDJ1ZE9oUHZvOTJFbz0%3D&ovuser=97405bf3-68fc-4681-aa9f-205c2a526573%2cKSordia%40bottomline.org&OR=Teams-HL&CT=1668629563213&clickparams=eyJBcHBOYW1lIjoiVGVhbXMtRGVza3RvcCIsIkFwcFZlcnNpb24iOiIyNy8yMjEwMjgwNzIwMCIsIkhhc0ZlZGVyYXRlZFVzZXIiOmZhbHNlfQ%3D%3D#program-year)
6. [Advisor Full Name](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Success%20Hybrid%20Programming.aspx?xsdata=&sdata=eE1zMnVtOFZTNnJtNlp2WldHVmtBaDdoUEs1OGdLTDJ1ZE9oUHZvOTJFbz0%3D&ovuser=97405bf3-68fc-4681-aa9f-205c2a526573%2cKSordia%40bottomline.org&OR=Teams-HL&CT=1668629563213&clickparams=eyJBcHBOYW1lIjoiVGVhbXMtRGVza3RvcCIsIkFwcFZlcnNpb24iOiIyNy8yMjEwMjgwNzIwMCIsIkhhc0ZlZGVyYXRlZFVzZXIiOmZhbHNlfQ%3D%3D#advisor-full-name)

We are working on making a video guide available for the next release- stay tuned!

Success Hybrid Programming Dashboard

**Navigation**

**Quick Slicer Menu**

* **Definition**: The Quick slicer menu is a report element that allows you to view all the different reporting options.
* **Purpose:**Allows us to filter (slice) the data by a variety of options, such as region, 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 on Success Hybrid Programming Dashboard

**Expanded Slicer Menu**

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

**​​​​​​​**

To access the expanded slicer menu click the "More" button on the right side of the Quick slicer menu to get more slicer options.

**Fall & Spring Cards**

* **Definition**: Cards are a report element that highlights summarized data
* **Purpose:**Allow us to quickly visualize key information (i.e. total # of students or % of students in a certain category) ​​​​​​​
* **Example:**

**​​​​​​​**

Fall Cards can be seen only when "Fall" toggle is on

Spring cards can be seen when "Spring" toggle is on

**​​​​​​​​​​​​​​Graph Views**

* **Definition**: The Graph views are a visual representation of student distributions and trends
* **Purpose:**Allows us to identify potential relationships between student groups, trends in student data, changes over time, etc. ​​​​​​​
* **Example:**​​​​​​​**​​​​​​​**​​​​​​​

Line graph showing the meetings over each week across the semester

**Table Views**

* **Definition**: The Table View is a visual summary of student data by relevant categories. For dashboards where student-level data is presented, table views show a by-name list of student data
* **Purpose:**Allows us to see summary statistics by category and/or show a by-name list of students and their relevant data​​​​​​​
* **Example:​​​​​​​**​​​​​​​

Table view for Fall Semester

**Key Engagement Metrics**

**Goal: Schedule this # of meetings per week**

* **Definition**: The number of meetings you should be scheduling each week to remain on track to reach your engagement goals
* **How is it calculated?**according to our engagement guidelines, you should be meeting with ~21% of your active caseload each week. Thus, this number represents 21% of your active caseload​​​​​​​
* **What can I do to improve this number?**Nothing! This particular data point is static. It is meant to always display 21% of your active caseload.

**# Meetings this Week**

* **Definition**: This is the number of student meetings advisors had this week. It only includes students who are currently active or Graduated (depending on the semester).
* **How is it calculated?**This number comes from looking at the date the meeting happened (or will happen) and comparing it to the Sunday of the current week. If the week number of the day of the meeting matches the week of the current Sunday, the meeting will count for this week.   
  For example, today is 11/16/2022 and the next meeting with my student is happening on 11/17/2022. The Sunday of the current week was 11/13/2022. The week numbers match, thus the meeting is happening this week.
* **What can I do to improve this number?**Make sure you record all your meetings (past and future) in Salesforce. Entering future meetings will give you a better idea of how many more engagements you still need to reach your semester goals

**# Meetings Next Week**

* **Definition**: This is the number of student meetings advisors are having next week. It only includes students who are currently active or Graduated (depending on the semester).
* **How is it calculated?**This number comes from looking at the date the meeting happened (or will happen) and comparing it to the Sunday of the upcoming week. If the week number of the day of the meeting matches the week of the upcoming Sunday, the meeting will count for next week.   
  For example, today is 11/16/2022 and the next meeting with my student is happening on 11/21/2022. The Sunday of the upcoming week will be 11/20/2022. The week numbers match, thus the meeting is happening next week.
* **What can I do to improve this number?**Make sure you record all your meetings (past and future) in Salesforce. Entering future meetings will give you a better idea of how many more engagements you still need to reach your semester goals

**Average Weekly Meetings**

* **Definition**: The number of meetings you should be scheduling each week to remain on track to reach your engagement goals
* **How is it calculated?**according to our engagement guidelines, you should be meeting with ~21% of your active caseload each week. Thus, this number represents 21% of your active caseload​​​​​​​
* **What can I do to improve this number?**Nothing! This particular data point is static. It is meant to always display 21% of your active caseload.

**Weekly Meetings Needed to hit goal for the semester**

* **Definition**: This is the number of student meetings advisors need in order to reach the engagement goal for the semester.
* **How is it calculated?**This number is calculated by taking the following things into consideration:
* **What can I do to improve this number?**Make sure you are entering all your meetings (past and future) into salesforce. Additionally, double check that the dates are within the appropriate parameters for the semester.

**Total Caseload Meetings**

* **Definition**: The total number of meetings recorded so far during the selected semester (either Fall or Spring)
* **How is it calculated?**This is an aggregation that adds up every single meeting recorded in Salesforce. For a meeting to count, the following must be true:   
  - The meeting must occur on or after the official start of the Fall/Spring  
  - The meeting must be recorded in Salesforce on or before the official end of the Fall/Spring  
  Meetings scheduled ahead of the start of the official start date will be counted.   
  Meetings entered AFTER the deadlines will NOT be counted. ​​​​​​​
* **What can I do to improve this number?**Enter your data on time. Remember to add your meetings as soon as they happen, or shortly after. Otherwise, they might not be counted as part of your total for the semester.

**Data Elements**

**Student Full Name**

* **Definition**: The legal first and last name of a student, as it is captured during the intake process. Sometimes this data point will show a student's preferred name instead of their first name.
* **Why do we need it?**to be able to identify our students, assign them to caseloads, and track other relevant engagement metrics​​​​​​​
* **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)

**Meeting Date**

* **Definition**: The day, month, and year when the student met with their Bottom Line advisor. This dashboard allows you to see future scheduled meetings. Therefore, it is possible that a future meeting might show up in the graph/table views.
* **Why do we need it?**to keep track of the number of engagements a student has with their advisor/Bottom Line, as well as the services provided during said engagement​​​​​​​
* **Where do I enter this information?** A description of how to record a Meeting for your student in the database can be found in the [Salesforce Knowledge Base](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Meetings.aspx)

**Meeting Method**

* **Definition**: The form of communication through which an advisor engaged with the student. Examples include phone calls, video calls, and in-person meetings.
* **Why do we need it?**To ensure that we are engaging with our students in the most effective way, based on the specific service that is being delivered​​​​​​​
* **Where do I enter this information?**a thorough description of how to log a Meeting in Salesforce can be found in the [Salesforce Knowledge Base](https://tbl500amory.sharepoint.com/sites/SuccessProgramCurriculum/SitePages/Engagement-Tab.aspx#contact-attempts)**​​​​​​​**

**College Attending**

* **Definition**: The name of the college the student is currently attending
* **Why do we need it?**Knowing where our students go to college helps us establish more/better relationships with those schools. The college attending field also helps us understand where our students are more or less successful, or where they might need more or less support.
* **Where do I enter this information?**College Attending is captured under the Critical Data section of the student Record in Salesforce**​​​​​​​**

**Program Year**

* **Definition**: The number of years a student has been a part of Bottom Line, starting from their cohort year. For example, if the current academic year is 2022-23, a student in the 2022-23 cohort will show a Program Year = Year 1, while a student in the 2017-18 cohort will show a Program Year = Year 6.
* **Why do we need it?**Knowing the program year helps us understand the different needs of our cohorts, from type of meeting to level of engagement. ​​​​​​​
* **Where do I enter this information?**This is automatically generated by the database. Reach out to your Program Director if you notice that there is an error in your student's program year**​​​​​​​**​​​​​​​

**Advisor Full Name**

* **Definition**: The name of the advisor currently assigned to the student's Salesforce record
* **Why do we need it?**Allows us to assign and track caseloads​​​​​​​. Helps ensure accountability for the services provided to our students
* **Where do I enter this information?**Advisor Name is entered in the system when an advisor is first hired. Advisors are assigned students at the start of each academic year. If your caseload needs adjustments, please contact your Program Director.