

Salesforce: Understanding Standard and Customized Reports

October 4-5 2017

FOC BCO National Meeting

Twin Cities



- 1) Standard FOC Reports and Dashboards
- 2) Customizing Reports
- 3) Reporting Exercises



Today's Team

Carolina Rendon is a Program Officer with LISC's Family Income and Wealth Building team. She joined the national team last April to lead the Salesforce transition. Carolina supports the FOC network as the Salesforce System Administrator, provides Technical Assistance, and manages the network's data. Carolina brings over 5 years of experience working with Salesforce. Prior to joining LISC, Carolina worked at Instituto del Progreso Latino (a Chicago FOC) as the Grants Management and Compliance Coordinator.

Caroline Rendon is an assistant program officer at LISC Chicago. She supports the Chicago FOCs in their use of Salesforce and data analysis, and works with LISC Chicago's Data and Evaluation team on measuring program impact across the city. Prior to joining LISC Chicago, Caroline spent five years working in nonprofits on program evaluation, administration, and research.

(yes, Carolina & Caroline are two different people)

Tamika Evans is an assistant program officer with the Houston team supporting the FOC network to strengthen families, individuals and small businesses in five neighborhoods. Previously she has worked in arts and community-based organizations for over a decade focusing on community engagement, fund development, and property management, with a number of those years working with an affordable housing developer in Houston's historic Third Ward. Tamika enjoys reading historical fiction and non-fiction, relaxing at beautiful state parks, and loving her three children in an atmosphere that nourishes their heart, hands, and mind.



Standard FOC Reports and Dashboards

Session Title: Salesforce: Understanding Standard and Customized Reports

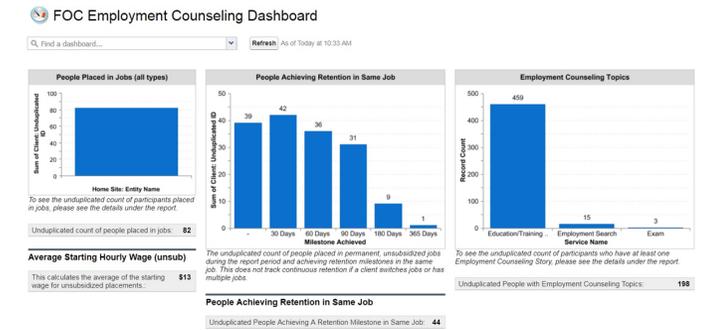
Presenter: Carolina Rendon



Employment Counseling

Outcome Measures in Salesforce

1. People Placed in Jobs (all types)
2. Average Starting Hourly Wage (unsubsidized)
3. People Achieving Retention (same job)
 - 3a. People Due for Retention
4. People Working on Employment Counseling Topics



Reports & Dashboards

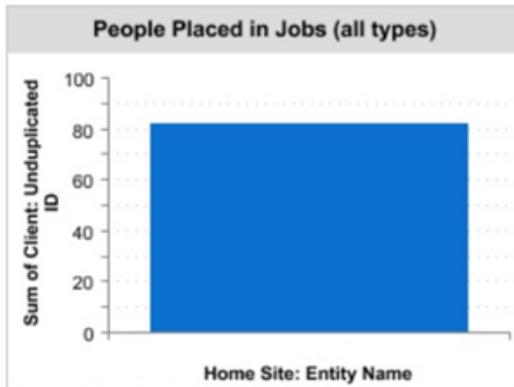
Folder	Report	Folder	Owner
FOC Employment Counseling	Average Starting Hourly Wage (unsubsidized)	FOC Employment Counseling	Patricia_LUSIG@pacnet.edu
FOC Employment Counseling	Education/Training to be Awarded - Avg	FOC Employment Counseling	Scottie_Cooper
FOC Employment Counseling	Employment Counseling Topics	FOC Employment Counseling	Patricia_LUSIG@pacnet.edu
FOC Employment Counseling	People Achieving Retention in Same Job	FOC Employment Counseling	Patricia_LUSIG@pacnet.edu
FOC Employment Counseling	People Placed in Jobs (all types)	FOC Employment Counseling	Patricia_LUSIG@pacnet.edu
FOC Employment Counseling	Unduplicated # achieving retention in same job	FOC Employment Counseling	Patricia_LUSIG@pacnet.edu

Employment Counseling

FOC Employment Counseling Dashboard - CY 2017 (data displayed based on last refresh)

Find a dashboard...

Refresh As of Today at 10:33 AM

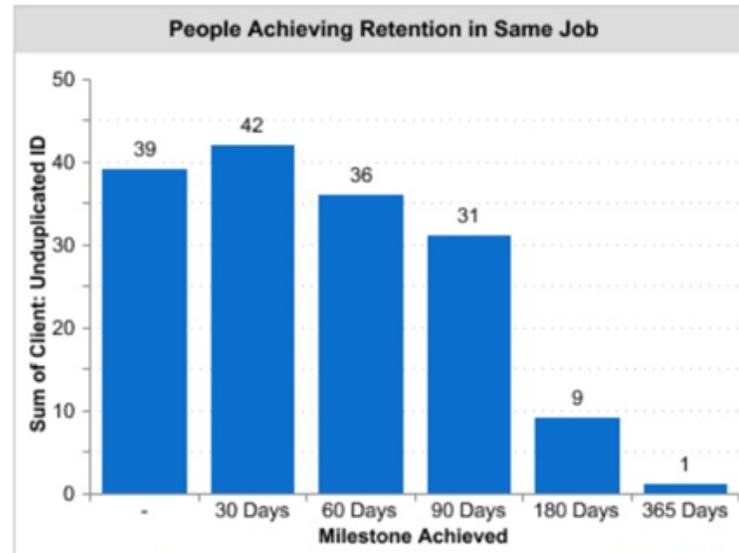


To see the unduplicated count of participants placed in jobs, please see the details under the report.

Unduplicated count of people placed in jobs: **82**

Average Starting Hourly Wage (unsub)

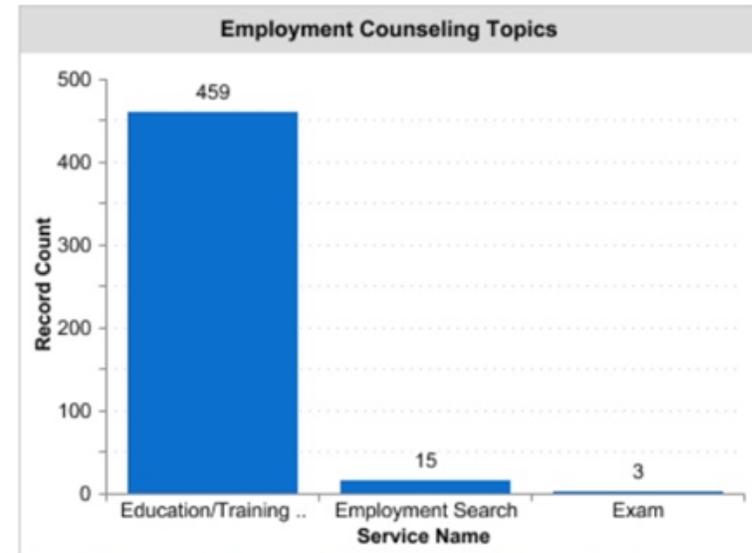
This calculates the average of the starting wage for unsubsidized placements.: **\$13**



The unduplicated count of people placed in permanent, unsubsidized jobs during the report period and achieving retention milestones in the same job. This does not track continuous retention if a client switches jobs or has multiple jobs.

People Achieving Retention in Same Job

Unduplicated People Achieving A Retention Milestone in Same Job: **44**



To see the unduplicated count of participants who have at least one Employment Counseling Story, please see the details under the report.

Unduplicated People with Employment Counseling Topics: **198**

Employment Counseling

Home Intake Entities Contacts Case Records Client Households Groups & Classes **Reports** Dashboards

Reports & Dashboards New Report...

Folders

Find a folder...

All Folders

- My Personal Custom Reports
- My Personal Dashboards
- FOC Bridges to Career Opportunity
- FOC Dashboards
- FOC Demographics and Enrollment Info
- FOC Employment Counseling**
- FOC Financial Counseling Reports
- FOC Income Supports Counseling
- FOC Overall Services
- Instituto del Progreso Latino

FOC Employment Counseling

Find reports and dashboards...

All Items All Types

Action	Name ↑	Folder	Created By
▼	Average Starting Hourly Wage (unsub) The average starting hourly wage among unsubsidized job placements during the report period.	FOC Employment Counseling	Partners, (LISC) Exponent
▼	Employment Counseling Topics The list and count of people working on Employment Counseling topics, plus the unduplicated count of people working on any Employment Counseling topic on a Service Entry during the report period.	FOC Employment Counseling	Partners, (LISC) Exponent
▼	People Achieving Retention in Same Job The list and count of retention milestones achieved in a single permanent, unsubsidized job placement during the report period, plus the unduplicated count of people achieving retention milestones in the same job – 30, 60, 90, 180, 270, 3 days.	FOC Employment Counseling	Partners, (LISC) Exponent
▼	People Placed in Jobs (all types) The list and count of all types of job placements, plus the unduplicated count of participants placed in employment (excluding previous employment) during the report period.	FOC Employment Counseling	Partners, (LISC) Exponent
▼	Undup # achieving retention in same job	FOC Employment Counseling	Rendon, Carolina

Employment Counseling

Home Intake Entities Contacts Case Records Client Households Groups & Classes **Reports** Dashboards

People Placed in Jobs (all types)

Report Generation Status: Complete

Report Options:

Summarize information by: Home Site: Entity Name Show: All case records

Time Frame

Date Field: Job Start Date Range: Custom

From: 1/1/2017 To: 12/31/2017

2 Run Report Hide Details Customize Save As Printable View Export Details

Filtered By: Client had this job before enrollment equals False Clear filter criteria

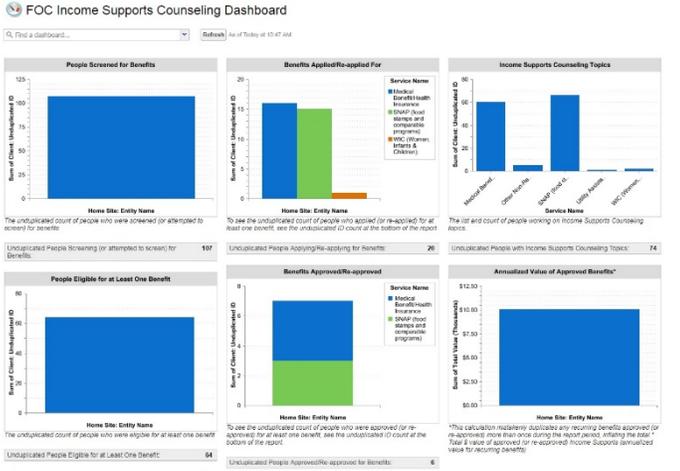
Grouped By: Home Site: Entity Name Sorted By: Home Site: Entity Name

Case Name	Employment Name	Job Type	Job Title/Position	Job Start Date	Job End Date	Client: Unduplicated ID
Home Site: Entity Name: (87 records)						83
FOC 2/2017 Case Record	P-75283	Permanent	food crew server	4/10/2017	-	1
FOC 2/2017 Case Record	P-76007	Permanent	Assembler operator	9/25/2017	-	1
FOC 2/2017 Case Record	P-65282	Permanent	Homecare Aide	5/2/2017	-	1
FOC 2/2017 Case Record	P-65693	Permanent	Passenger agent	6/22/2017	-	1
FOC 2/2017 Case Record	P-76111	Permanent	Customer Service	7/10/2017	-	1
FOC 2/2017 Case Record	P-75424	Permanent	machine operator	9/19/2017	-	1
FOC 2/2017 Case Record	P-66703	Permanent	C.N.A	8/2/2017	-	1
FOC 2/2017 Case Record	P-76158	Permanent	CNA	1/26/2017	-	1
FOC 2/2017 Case Record	P-65935	Permanent	Assembler operator	7/31/2017	-	1
FOC 2/2017 Case Record	P-76156	Permanent	Machine Operator	5/9/2017	-	1
FOC 2/2017 Case Record	P-66699	Permanent	C.N.A	7/17/2017	-	1
FOC 2/2017 Case Record	P-66644	Permanent	C.N.A	8/29/2017	-	1

Follow-up exercise to customize

Income Support Counseling

Outcome Measures in Salesforce
1. People Screened for Benefits
2. People Eligible for at Least One Benefit
3. Benefits Applied/Re-applied For
4. Benefits Approved/Re-approved For
5. People Working on Income Supports Counseling Topics
6. Annualized Value of Approved Benefits*



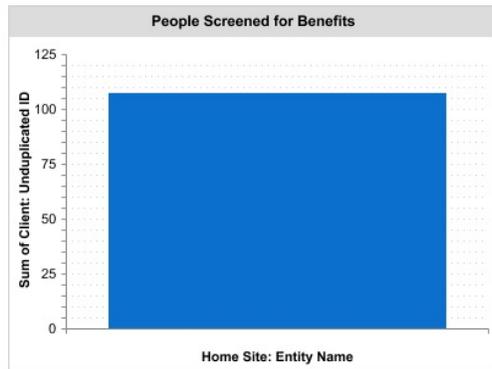
Report Name	Description	Owner
Annualized Value of Approved Benefits*	This report calculates the annualized value of approved benefits (annualized value for recurring benefits).	FOC Income Supports Counseling
Benefits Applied/Re-applied For	To see the unduplicated count of people who applied (or re-applied) for at least one benefit, see the unduplicated ID count at the bottom of the report.	FOC Income Supports Counseling
Benefits Approved/Re-approved	To see the unduplicated count of people who were approved (or re-approved) for at least one benefit, see the unduplicated ID count at the bottom of the report.	FOC Income Supports Counseling
Income Supports Counseling Topics	The list and count of people working on Income Supports Counseling topics.	FOC Income Supports Counseling
People Eligible for at Least One Benefit	To see the unduplicated count of people who were eligible for at least one benefit, see the unduplicated ID count at the bottom of the report.	FOC Income Supports Counseling
People Screened for Benefits	The unduplicated count of people who were screened (or attempted to screen) for benefits.	FOC Income Supports Counseling

**This report calculation mistakenly duplicates any recurring benefits approved (or re-approved) more than once during the report period, inflating the total. * Total \$ value of approved (or re-approved) Income Supports (annualized value for recurring benefits)*

Income Support Counseling

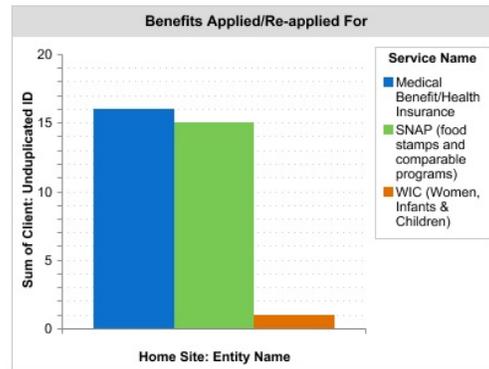
FOC Income Supports Counseling Dashboard - CY 2017 (data displayed based on last refresh)

Find a dashboard... Refresh As of Today at 10:47 AM



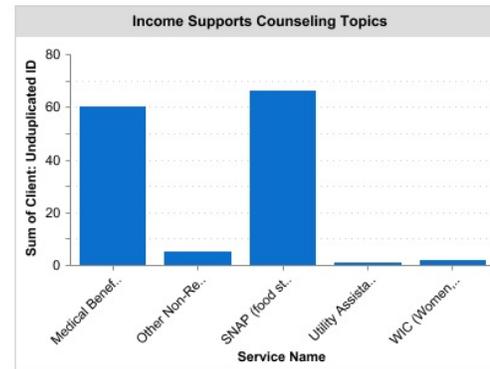
The unduplicated count of people who were screened (or attempted to screen) for benefits

Unduplicated People Screening (or attempted to screen) for Benefits: 107



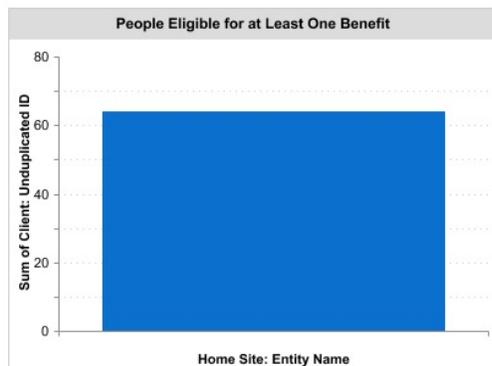
To see the unduplicated count of people who applied (or re-applied) for at least one benefit, see the unduplicated ID count at the bottom of the report.

Unduplicated People Applying/Re-applying for Benefits: 20



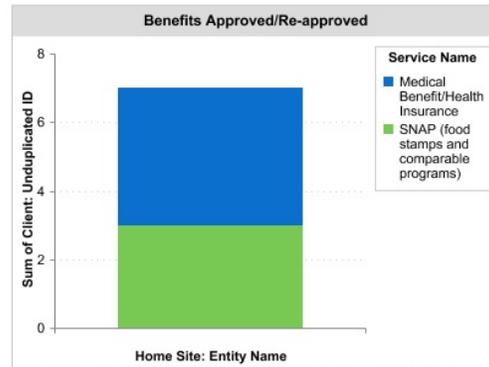
The list and count of people working on Income Supports Counseling topics.

Unduplicated People with Income Supports Counseling Topics: 74



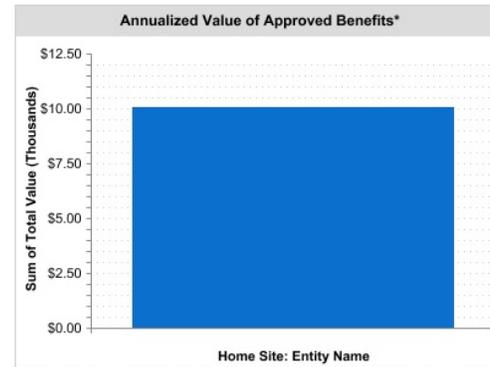
The unduplicated count of people who were eligible for at least one benefit

Unduplicated People Eligible for at Least One Benefit: 64



To see the unduplicated count of people who were approved (or re-approved) for at least one benefit, see the unduplicated ID count at the bottom of the report.

Unduplicated People Approved/Re-approved for Benefits: 6



This calculation mistakenly duplicates any recurring benefits approved (or re-approved) more than once during the report period, inflating the total. Total \$ value of approved (or re-approved) Income Supports (annualized value for recurring benefits)

Income Support Counseling

Home Intake Entities Contacts Case Records Client Households Groups & Classes **Reports** Dashboards

Reports & Dashboards New Report...

Find a folder...

All Folders

- My Personal Custom Reports
- My Personal Dashboards
- FOC Bridges to Career Opportunity
- FOC Dashboards
- FOC Demographics and Enrollment Info
- FOC Employment Counseling
- FOC Financial Counseling Reports
- FOC Income Supports Counseling**
- FOC Overall Services
- Instituto del Progreso Latino

FOC Income Supports Counseling

Find reports and dashboards...

All Items All Types

Action	Name ↑	Folder	Created By
▼	Annualized Value of Approved Benefits* Total \$ value of approved (or re-approved) Income Supports (annualized value for recurring benefits)	FOC Income Supports Counseling	Partners, (LISC) Exponent
▼	Benefits Applied/Re-applied For The list and count of Income Supports Counseling topics with the "Applied (or re-applied)" status during the report period, as well as the unduplicated count of participants with at least one such topic.	FOC Income Supports Counseling	Partners, (LISC) Exponent
▼	Benefits Approved/Re-approved The list and count of Income Supports Counseling topics with the "Approved (or re-approved)" status during the report period, as well as the unduplicated count of participants with at least one such topic.	FOC Income Supports Counseling	Partners, (LISC) Exponent
▼	Income Supports Counseling Topics The list and count of people working on Income Supports Counseling topics, plus the unduplicated count of people working on any Income Supports Counseling topic on a Service Entry during the report period.	FOC Income Supports Counseling	Partners, (LISC) Exponent
▼	People Eligible for at Least One Benefit Unduplicated count of participants who were screened as eligible for at least one benefit.	FOC Income Supports Counseling	Partners, (LISC) Exponent
▼	People Screened for Benefits The list and count of people with a value in the General Benefits Screening Results field on an Income Supports Counseling Service Entry during the report period.	FOC Income Supports Counseling	Partners, (LISC) Exponent

Income Support Counseling

Home Intake Entities Contacts Case Records Client Households Groups & Classes **Reports** Dashboards

People Eligible for at Least One Benefit

Report Generation Status: Complete

Report Options:

Summarize information by: Home Site: Entity Name Show: All case records

1 Time Frame: Date Field: Date / Time Range: Current FY From: 1/1/2017 To: 12/31/2017

2 Run Report Hide Details Customize Save As Printable View Export Details

Filtered By: Service Area equals Income Supports Counseling AND General Benefits Screening Results equals Completed screening: eligible for at least one benefit

Grouped By: Home Site: Entity Name Sorted By: Home Site: Entity Name

Case Name	Client: Unduplicated ID	# of people
Home Site: Entity Name	(81 records)	64
FOC 6/2017 Case Record		1
FOC 6/2017 Case Record		1
FOC 6/2017 Case Record		1
FOC 6/2017 Case Record		1
FOC 6/2017 Case Record		1
FOC 6/2017 Case Record		1
FOC 6/2017 Case Record		1
FOC 6/2017 Case Record		1
FOC 6/2017 Case Record		1
FOC 6/2017 Case Record		1

Home Intake Entities Contacts Case Records Client Households Groups & Classes **Reports** Dashboards

Benefits Applied/Re-applied For

Report Generation Status: Complete

Report Options:

Summarize information by: Home Site: Entity Name Service Name Show: All case records

2 Run Report Hide Details Customize Save As Printable View Export Details

1 Time Frame: Date Field: Date / Time Range: Current FY From: 1/1/2017 To: 12/31/2017

Filtered By: Service Area equals Income Supports Counseling AND Status equals Applied (or re-applied)

filter criteria # of people

Sum of Client: Unduplicated ID	Service Name			Grand Total	Case Name	Client Name	Service Area
Home Site: Entity Name	Medical Benefit/Health Insurance	SNAP (food stamps and comparable programs)	WIC (Women, Infants & Children)				
	16		15	1			20
	1				FOC 8/2017 Case Record		Income Supports Counseling
	1				FOC 6/2017 Case Record		Income Supports Counseling
	1				FOC 8/2017 Case Record		Income Supports Counseling
	1				FOC 6/2017 Case Record		Income Supports Counseling
	1				FOC 2/2017 Case Record		Income Supports Counseling
	1				FOC 2/2017 Case Record		Income Supports Counseling
	1				FOC 2/2017 Case Record		Income Supports Counseling
	1				FOC 8/2017 Case Record		Income Supports Counseling

Financial Counseling

Outcome Measures in Salesforce

1. People w/ Baseline Financial Assessments
2. People w/ Subsequent Financial Assessments
 - 2a. People Due for a Credit Report Pull
3. People w/ Action Plans
4. People Working on Financial Counseling Topics
5. People w/ FICO Score Increases*
6. People w/ NI Increases*
7. People w/ NW Increases*



FOC Financial Counseling Dashboard

Find a dashboard... Refresh As of Today at 10:44 AM

People w/ Baseline Financial Assessments

Assessment Record Type	Sum of Client Unduplicated
Balance Sheet	214
Budget	217
Credit Report	205
Financial H.	216

People w/ Baseline Financial Assessments

Assessment Record Type	Sum of Client Unduplicated ID
Balance Sheet	19
Budget	30
Credit Report	199
Financial Health	15

Undup Total of Baseline Financial Assessments: **220**

Undup Total of Subsequent Financial Assessments: **200**

Calculate FICO Credit Score Improvements

Click here to see data to calculate number of people with improved FICO score: **1,570**

People w/ Subsequent Financial Assessments

Financial Counseling Topics

The list and count of people working on Financial Counseling topics:

Service Name	Record Count
Financial Counseling	60
Other Topics	~5

Unduplicated People with Financial Counseling Topics: **83**

People with Action Plan Starts

Unduplicated People with Action Plan Starts: **11**

Calculate Net Worth Increases

Click here to see data to calculate number of people with net worth increases: **2,287**

Calculate Net Income Increases

Click here to see data to calculate number of people with net income increases: **2,306**

Reports & Dashboards

Folder	Report Name	Folder	Created By
FOC Financial Counseling Reports	# of People Due for a Credit Report Pull	FOC Financial Counseling Reports	Boston_Casella
FOC Financial Counseling Reports	Financial Counseling Topics	FOC Financial Counseling Reports	Boston_BUSCO_Engel
FOC Financial Counseling Reports	Number of People with an Action Plan	FOC Financial Counseling Reports	Boston_BUSCO_Engel
FOC Financial Counseling Reports	People w/ Baseline Financial Assessments	FOC Financial Counseling Reports	Boston_BUSCO_Engel
FOC Financial Counseling Reports	People w/ Subsequent Financial Assessments	FOC Financial Counseling Reports	Boston_BUSCO_Engel
FOC Financial Counseling Reports	People with a FICO Credit Score	FOC Financial Counseling Reports	Boston_BUSCO_Engel

*Report provides a list of clients and the calculations need to be completed outside of Salesforce.

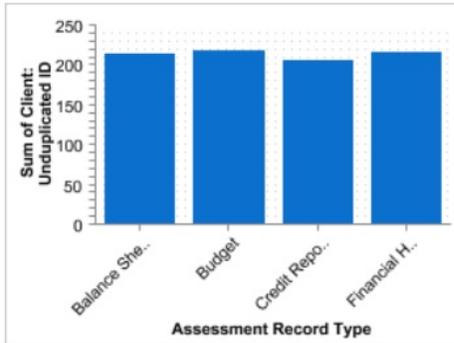
Financial Counseling

FOC Financial Counseling Dashboard - CY 2017 (data displayed based on last refresh)

Find a dashboard...

Refresh As of Today at 10:44 AM

People w/ Baseline Financial Assessments



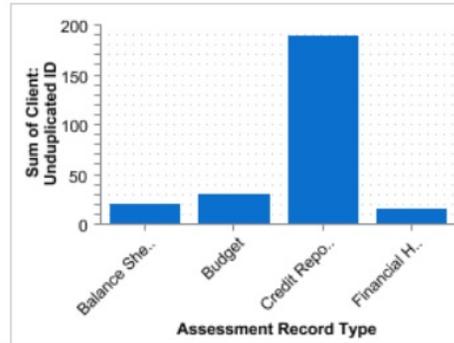
People w/ Baseline Financial Assessments	
Assessment Record Type	Sum of Client Unduplicated ID
Balance Sheet	214
Budget	217
Credit Report	205
Financial Health	216

Undup Total of Baseline Financial Assessments: **220**

Calculate FICO Credit Score Improvements

Click here to see data to calculate number of people with improved FICO score.: **1,570**

People w/ Subsequent Financial Assessments



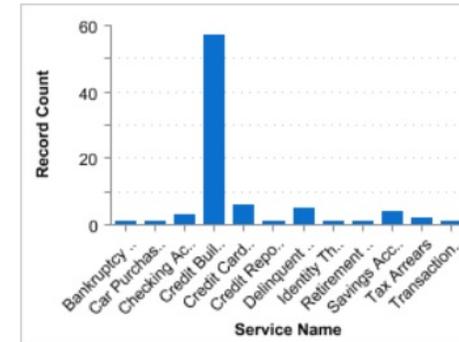
People w/ Subsequent Financial Assessments	
Assessment Record Type	Sum of Client Unduplicated ID
Balance Sheet	19
Budget	30
Credit Report	189
Financial Health	15

Undup Total of Subsequent Financial Assessments: **200**

Calculate Net Income Increases

Click here to see data to calculate number of people with net income increases.: **1,306**

Financial Counseling Topics



The list and count of people working on Financial Counseling topics.

Unduplicated People with Financial Counseling Topics: **83**

People with Action Plan Starts

Unduplicated People with Action Plan Starts: **11**

Calculate Net Worth Increases

Click here to see data to calculate number of people with net worth increases.: **1,287**

Financial Counseling

Home Intake Entities Contacts Case Records Client Households Groups & Classes **Reports** Dashboards

Reports & Dashboards New Report...

Find a folder...

All Folders

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- My Personal Dashboards
- FOC Bridges to Career Opportunity
- FOC Dashboards
- FOC Demographics and Enrollment Info
- FOC Employment Counseling
- FOC Financial Counseling Reports**
- FOC Income Supports Counseling
- FOC Overall Services
- Instituto del Progreso Latino

FOC Financial Counseling Reports

Find reports and dashboards...

All Items All Types

Action	Name ↑	Folder	Created By
▼	# of People Due for a Credit Report Pull Number of people who have exceeded 180 days since the last credit report pull.	FOC Financial Counseling Reports	Rendon, Carolina
▼	Financial Counseling Topics The list and count of people working on Financial Counseling topics, plus the unduplicated count of people working or any Financial Counseling topic on a Service Entry during the report period.	FOC Financial Counseling Reports	Partners, (LISC) Exponent
▼	Number of People with an Action Plan The list and count of Action Plans, as well as the unduplicated count of participants who have at least one Action Plan with a Start Date during the report period.	FOC Financial Counseling Reports	Partners, (LISC) Exponent
▼	People w/ Baseline Financial Assessments The list and count of baseline financial assessments, as well as the unduplicated count of participants with at least one baseline financial assessment, dated during the report period.	FOC Financial Counseling Reports	Partners, (LISC) Exponent
▼	People w/ Subsequent Financial Assessmts The list and count of subsequent financial assessments, as well as the unduplicated count of participants with at least one subsequent financial assessment, dated during the report period.	FOC Financial Counseling Reports	Partners, (LISC) Exponent
▼	People with a FICO Credit Score Shows baseline credit reports (including before report period & excluding assessments with only "No score available (reasons other than insufficient credit history)" or "Did not attempt to pull score"). Shows subsequent credit reports during report period.	FOC Financial Counseling Reports	Partners, (LISC) Exponent
▼	People with Net Income Shows baseline budgets (including before report period) and subsequent budgets during report period.	FOC Financial Counseling Reports	Partners, (LISC) Exponent
▼	People with Net Worth Shows baseline balance sheets (including before report period) and subsequent balance sheets during report period.	FOC Financial Counseling Reports	Partners, (LISC) Exponent
▼	Unduplicated Number of Baseline CFAs People submitting at least one baseline financial assessment.	FOC Financial Counseling Reports	Partners, (LISC) Exponent

1-10 of 10 ◿ ◀◀ Previous Next ▶▶ Page 1 of 1

Financial Counseling

Home Intake Entities Contacts Case Records Client Households Groups & Classes **Reports** Dashboards

People with Net Income

Report Generation Status: Note: 2,000 of 2,336 records are displayed below. Select Export Details for a complete view of your data.

Report Options:

Summarize information by: Show

Time Frame
Date Field: Range:
From: To:

Filtered By: 1 AND ((2 AND (3 AND 4)) OR (5 AND (6 AND 7)))

1. Assessment Record Type equals Budget
2. Sequence equals Baseline
3. Assessment Date greater or equal 1/1/2006
4. Assessment Date less or equal TODAY
5. Sequence equals Latest
6. Assessment Date greater or equal 1/1/2017
7. Assessment Date less or equal 12/31/2017 ← report period

Grouped By: Case Record 18-digit ID
Sorted By: Case Record 18-digit ID ↑

Case Name	Assessment #	Assessment Date	Sequence ↑	Client: Unduplicated ID	Total Monthly Income (net)
<input type="checkbox"/> Case Record 18-digit ID: a0t3600t (1 record)				1	
FOC 2/2017 Case Record	Assessment -941655	9/21/2015	Baseline	1	\$260.00
<input type="checkbox"/> Case Record 18-digit ID: a0t3600 (1 record)				1	
FOC 2/2017 Case Record	Assessment -941657	10/26/2015	Baseline	1	\$0.00

Applicable to the 3 Key Fin Outcomes

Financial Counseling

Home Intake Entities Contacts Case Records Client Households Groups & Classes **Reports** Dashboards

People with Net Income

Report Generation Status: Note: 2,000 of 2,336 records are displayed below. Select Export Details for a complete view of your data.

Report Options:

Summarize information by: Show:

Time Frame

Date Field: Range:
 From: To:

Filtered By: 1 AND ((2 AND (3 AND 4)) OR (5 AND (6 AND 7)))

- 1. **Assessment Record Type** equals **Budget**
- 2. **Sequence** equals **Baseline**
- 3. **Assessment Date** greater or equal **1/1/2006**
- 4. **Assessment Date** less or equal **TODAY**
- 5. **Sequence** equals **Latest**
- 6. **Assessment Date** greater or equal **1/1/2017**
- 7. **Assessment Date** less or equal **8/31/2017**

filter criteria

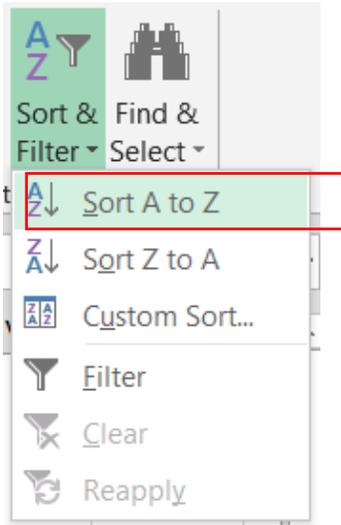
Grouped By:
 Sorted By:

Case Name	Assessment #	Assessment Date	Sequence	Client: Unduplicated ID	Total Monthly Income (net)
<input type="checkbox"/> Case Record 18-digit ID: a0t3600 (1 record)				1	
FOC 2/2017 Case Record	Assessment -941655	9/21/2015	Baseline	1	\$260.00
<input type="checkbox"/> Case Record 18-digit ID: a0t3600 (1 record)				1	
FOC 2/2017 Case Record	Assessment -941657	10/26/2015	Baseline	1	\$0.00

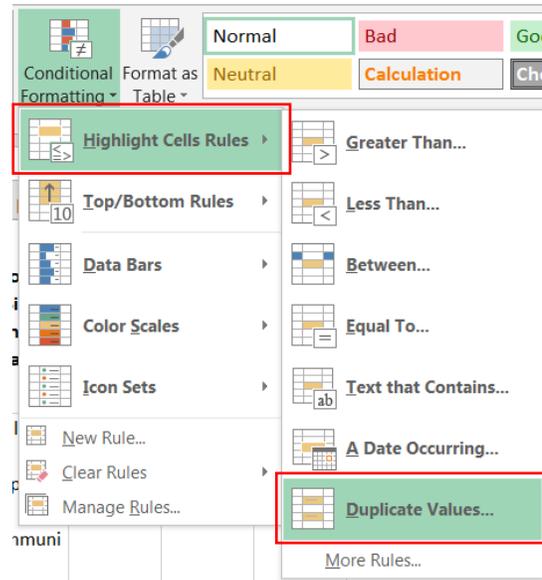
Financial Counseling



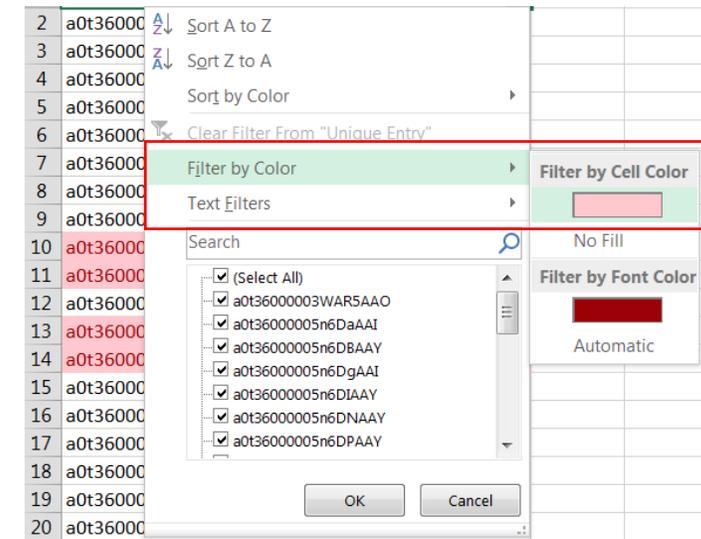
Tips to calculate increases:



1. Sort data by Case Record ID



2. Highlight duplicates (red)



3. Filter by color (red)

	A	B	C	D	E	F	G	H
1	Assessment Da	Sequence	Client: Unc	Total Mon	Home Site	Home Site Name	Case Record 18-digit ID	
21	1/3/2015	Baseline	1	725		Breakthrough Urban - TEST	a0t36000c050uj5AAA	
22	5/17/2017	Latest	1	835		Breakthrough Urban - TEST	a0t36000c050uj5AAA	

4. Use a formula to calculate increase

=IF(G22=G21,D22-D21,"")

Overall Services

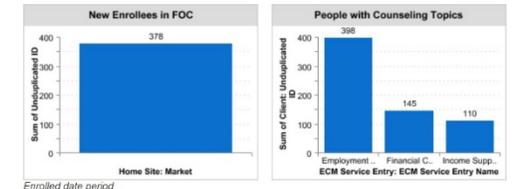
Outcome Measures in Salesforce

1. New Enrollees in FOC
2. People with Counseling Topics (interim bundling)
 - 2a. Employment Counseling
 - 2b. Financial Counseling
 - 2c. Income Supports Counseling



FOC Overall Services Dashboard

Find a dashboard... Refresh As of Two days ago at 10:32 AM



ECM Service Entry: ECM Service Entry Name	Sum of Client Unduplicated ID
Employment Counseling	398
Financial Counseling	145
Income Supports Counseling	110

Undup count of People with Counseling Topics: 442

Reports & Dashboards

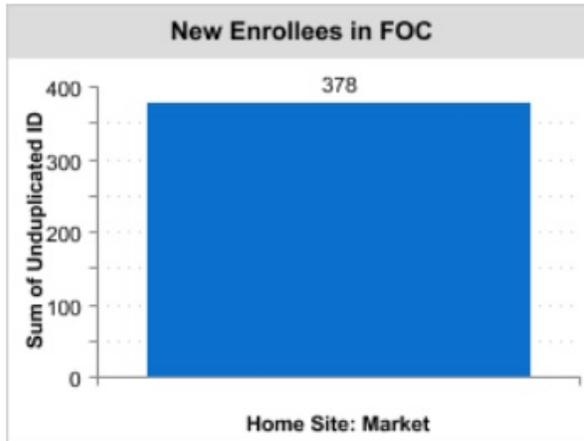
Folder	Name	Filter	Created By
At Enrollment Information	At Enrollment Information		
Demographic for FOC service entry	Demographic for FOC service entry		
New Enrollees in FOC	New Enrollees in FOC		
People with at least one Counseling ID	People with at least one Counseling ID		
People with counseling topics	People with counseling topics		
Total # of people with specific ID type	Total # of people with specific ID type		

Overall Services

FOC Overall Services Dashboard - CY 2017 (data displayed based on last refresh)

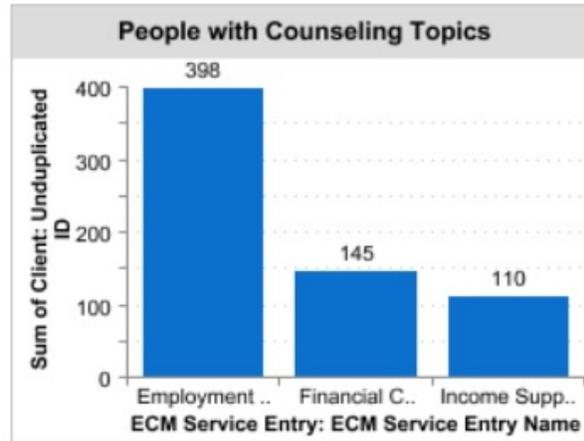
Find a dashboard...

Refresh As of Two days ago at 10:32 AM



Enrolled date period

Undup count of new enrollees: **378**



<u>ECM Service Entry: ECM Service Entry Name</u>	<u>Sum of Client: Unduplicated ID</u>
Employment Counseling	398
Financial Counseling	145
Income Supports Counseling	110

Undup count of People with Counseling Topics: **442**

Overall Services

Reports & Dashboards New Report...

Folders

Find a folder...

All Folders

- My Personal Custom Reports
- My Personal Dashboards
- FOC Bridges to Career Opportunity
- FOC Dashboards
- FOC Demographics and Enrollment Info
- FOC Employment Counseling
- FOC Financial Counseling Reports
- FOC Income Supports Counseling
- FOC Overall Services**
- Instituto del Progreso Latino

FOC Overall Services

Find reports and dashboards...

All Items ▼ All Types

Action	Name ↑	Folder	Created By
<input type="checkbox"/>	At Enrollment Information At enrollment data collected for highest grade completed, in school, working, primary interest, criminal convictions, living arrangement, military status, and voc. training/bridge program history.	FOC Overall Services	Rendon, Carolina
<input type="checkbox"/>	Demographics for FOC enrolled clients Basic demographics for clients enrolled in the FOC during the report period: age, gender, ethnicity, and race.	FOC Overall Services	Rendon, Carolina
<input type="checkbox"/>	FOC contact list (for reference) Contact information for clients enrolled in the FOC.	FOC Overall Services	Rendon, Carolina
<input type="checkbox"/>	New Enrollees in FOC The list and unduplicated count of participants with an "Enrolled Date" in the Financial Opportunity Center program during the report period.	FOC Overall Services	Partners, (LISC) Exponent
<input type="checkbox"/>	People with at least one Counseling SE The list and count of participants with (and the unduplicated count of participants with at least one of) the following with a "Date" during the report period: a Financial, Employment, or Income Supports Counseling Service Entry.	FOC Overall Services	Partners, (LISC) Exponent
<input type="checkbox"/>	People with counseling topics The list and count of Counseling topics, as well as the unduplicated count of participants who have at least one Counseling topic, on a Service Entry with a "Date" during the report period.	FOC Overall Services	Partners, (LISC) Exponent
<input type="checkbox"/>	Total # of people with exactly 2/3 types The unduplicated count of participants who have EXACTLY TWO of the following types of Service Entries with a "Date" during the report period: Employment, Income Supports, OR Financial	FOC Overall Services	Partners, (LISC) Exponent

Overall Services

People with counseling topics

Report Generation Status: Complete

Report Options:

Summarize information by: Summarize information by: Show

Time Frame

Date Field Range

From To

2 3

Filtered By:
ECM Service Entry: ECM Service Entry Name not equal to Work/Education Supports [Clear](#)

Home Site: Market	Home Site: Entity Name	Date / Time	Service Entry #	Service Area	Service Name	Status	Client: Unduplicated ID
<input type="checkbox"/>	ECM Service Entry: ECM Service Entry Name: Employment Counseling (254 records)						140
Case Name:		FOC 5/2017 Case Record (4 records)					1
Houston		3/17/2017 11:00 AM	ServiceEntry-2816	Employment Counseling	Employment Search	Discussed pros/cons	1
Houston		3/17/2017 11:00 AM	ServiceEntry-2816	Employment Counseling	Education/Training Search	Discussed pros/cons	1
Houston		3/30/2017 7:00 AM	ServiceEntry-1509	-	-	-	1
Houston		7/25/2017 2:00 PM	ServiceEntry-11831	-	-	-	1
Case Name:		17 Case Record (1 record)					1
Houston		1/26/2017 9:00 AM	ServiceEntry-0426	Employment Counseling	Employment Search	Initiated/continued search	1
Case Name		117 Case Record (3 records)					1
Houston		3/28/2017 8:00 AM	ServiceEntry-4837	Employment Counseling	Employment Search	Decided not to pursue	1

Overall Services

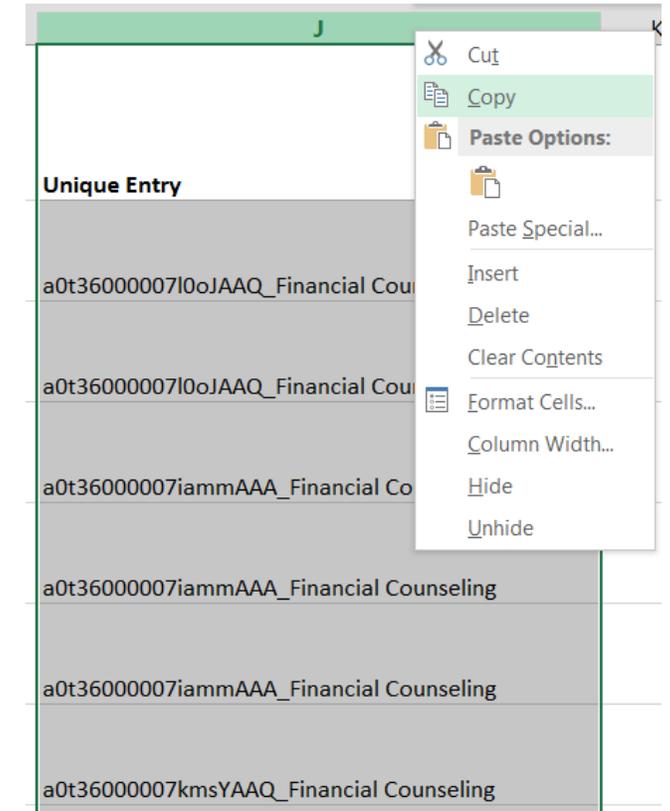
Tips to calculate interim bundling (2/3 and 3/3):



	A	B	C	D	E	F	G	H	I	J
	Case Record 18-digit ID	Date / Time	Service Area	Service Name	Status	Client: Unduplicated ID	Home Site : Ma	Home Site : Enti	ECM Service Entry: ECM Service Entry Name	Unique Entry
1										
2	a0t36000007l0oJAAQ	#####	Credit/Debt	Credit Builder Loan	Discussed pros/cons	1			Financial Counseling	=A2&"_"&I2
3	a0t36000007l0oJAAQ	#####	Credit/Debt	Credit Builder Loan	Payments not current	1			Financial Counseling	a0t36000007l0oJAAQ_Financial Counseling
4	a0t36000007iammAAA	#####	Administrative	Identity Theft	Errors/claims successful	1			Financial Counseling	a0t36000007iammAAA_Financial Counseling

1. Make each entry unique by combining the "Case Record 18-digit ID" and the "ECM Service Entry Name"

=A2&"_"&I2

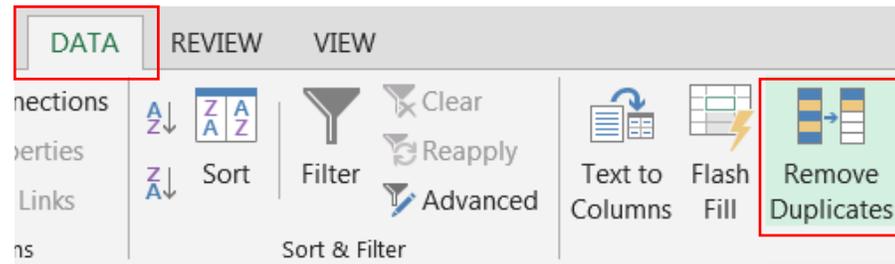
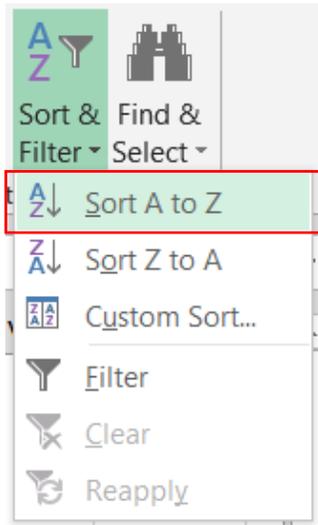


2. Copy column and Paste (values) into a new sheet

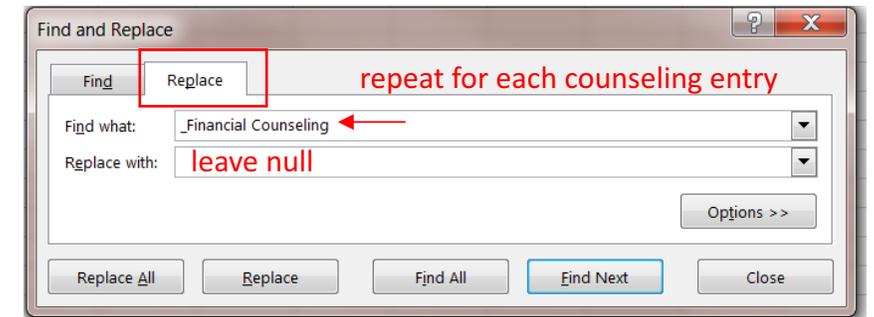
Overall Services



Tips to calculate interim bundling (2/3 and 3/3):



3a. De-duplicate values



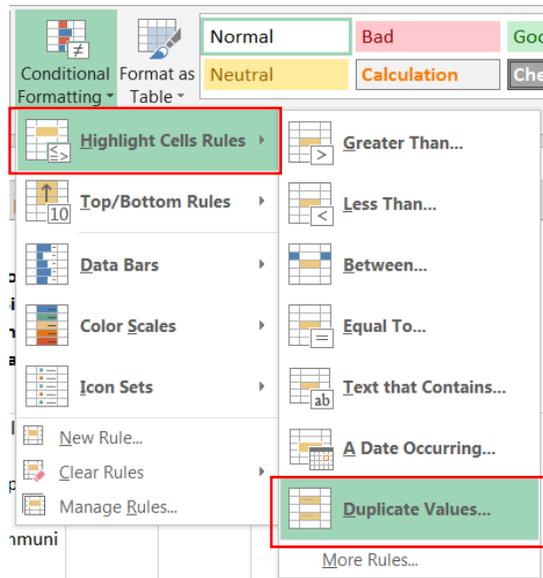
4. Remove the *counseling* text using "Find and Replace" (ctrl+F)

On the new sheet:

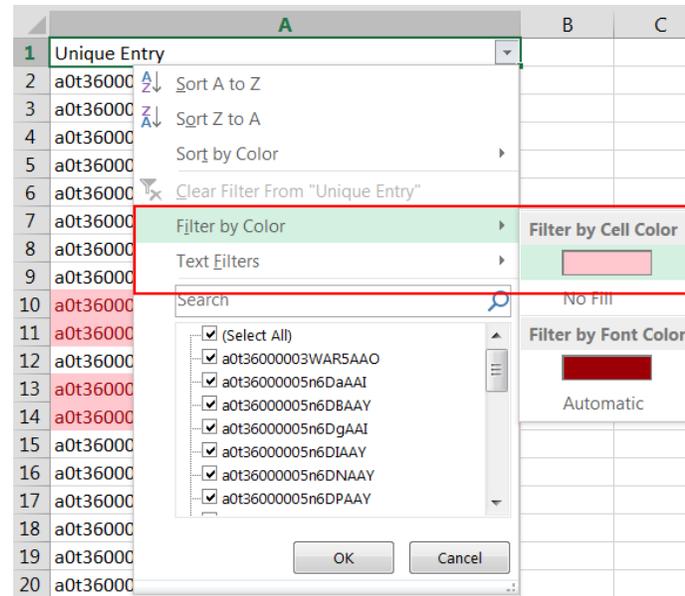
3. Sort Unique Entries

Overall Services

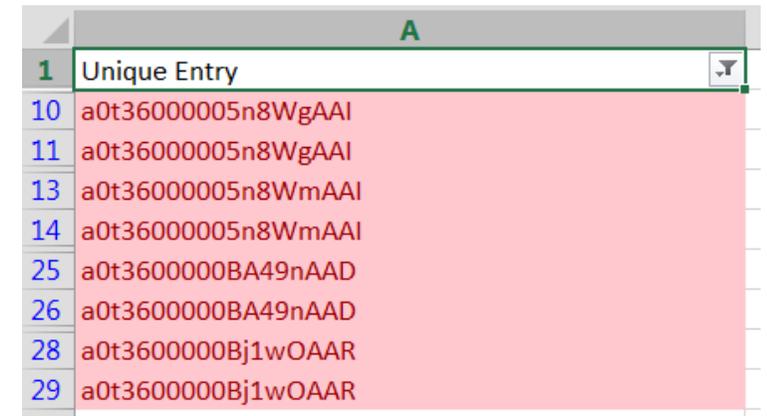
Tips to calculate interim bundling (2/3 and 3/3):



5. Highlight duplicates (red)



5a. Filter by color (red)

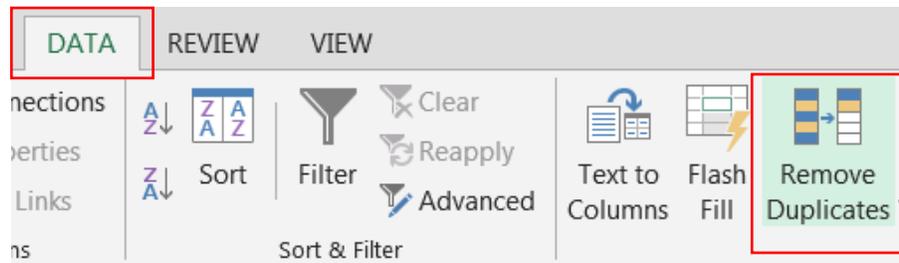


6. Copy column and Paste (values) into a new sheet

Overall Services



Tips to calculate interim bundling (2/3 and 3/3):



7. In a new sheet complete a final de-duplication of the data.

	A
1	Unique Entries
2	a0t36000005n8WgAAI
3	a0t36000005n8WmAAI
4	a0t3600000BA49nAAD
5	a0t3600000Bj1wOAAR
6	=COUNTIF(A2:A5,"*")
7	

8. Count the remaining values.

=COUNTIF(A2:A5,"*")

Bridges to Career Opportunities

Outcome Measures in Salesforce

1. People enrolled in BCO (report period)
 - 1a. People ever enrolled in BCO
2. People who began a bridge program
3. People who began an occupational skills training program/college degree program
4. People who completed occupational skills/college
5. Participants who obtained a credential
6. Bridge participants placed in jobs
7. Bridge participants placed in internships
8. Bridge participants w/ FICO Score Increases*
9. Bridge participants w/ NI Increases*
10. Bridge participants w/ NW Increases*

DASHBOARD



REPORTS

Name	Folder	Created By
Bridge participants placed in internship	FOC Bridges to Career Opportunity	Stasdon_Castillo
Bridge participants placed in jobs	FOC Bridges to Career Opportunity	Stasdon_Castillo
Bridge participants w/ FICO credit score	FOC Bridges to Career Opportunity	Stasdon_Castillo
Bridge participants w/ New Income	FOC Bridges to Career Opportunity	Stasdon_Castillo
Bridge participants w/ New Worth	FOC Bridges to Career Opportunity	Stasdon_Castillo
Participants who obtained a credential	FOC Bridges to Career Opportunity	Stasdon_Castillo
People enrolled in BCO (report period)	FOC Bridges to Career Opportunity	Stasdon_Castillo
People ever enrolled in BCO	FOC Bridges to Career Opportunity	Stasdon_Castillo
People who began a bridge program	FOC Bridges to Career Opportunity	Stasdon_Castillo
People who began an occupational skills training program	FOC Bridges to Career Opportunity	Stasdon_Castillo

*Report provides a list of clients and the calculations need to be completed outside of Salesforce.

Bridges to Career Opportunities

Reports & Dashboards New Report...

Folders

Find a folder...

All Folders

- My Personal Custom Reports
- My Personal Dashboards
- FOC Bridges to Career Opportunity**
- FOC Dashboards
- FOC Demographics and Enrollment Info
- FOC Employment Counseling
- FOC Financial Counseling Reports
- FOC Income Supports Counseling
- FOC Overall Services
- Instituto del Progreso Latino

FOC Bridges to Career Opportunity

Find reports and dashboards...

All Items

All Types

Action	Name ↑	Folder	Created By
<input type="checkbox"/>	Bridge participants placed in internship The list and count of BCO participants placed in internships during the report period.	FOC Bridges to Career Opportunity	Rendon, Carolina
<input type="checkbox"/>	Bridge participants placed in jobs The list and count of BCO participants placed in jobs overall (including those who obtained employment outside of the targeted career pathway) during the report period.	FOC Bridges to Career Opportunity	Rendon, Carolina
<input type="checkbox"/>	Bridge participants w/ FICO credit score Shows baseline credit reports (including before report period & excluding assessments with only "No score available (reasons other than insufficient credit history)" or "Did not attempt to pull score"). Shows subsequent credit reports during report period	FOC Bridges to Career Opportunity	Rendon, Carolina
<input type="checkbox"/>	Bridge participants w/ Net Income Shows baseline budgets (including before report period) and subsequent budgets during report period.	FOC Bridges to Career Opportunity	Rendon, Carolina
<input type="checkbox"/>	Bridge participants w/ Net Worth Shows baseline balance sheets (including before report period) and subsequent balance sheets during report period.	FOC Bridges to Career Opportunity	Rendon, Carolina
<input type="checkbox"/>	Participants who obtained a credential The list and count of BCO participants who attained a degree/certificate/license during the report period.	FOC Bridges to Career Opportunity	Rendon, Carolina
<input type="checkbox"/>	People enrolled in BCO (report period) The list and count of participants checked as BCO clients on the Case Record with a date in the "BCO Start Date" field on the Case Record that is during the report period.	FOC Bridges to Career Opportunity	Rendon, Carolina
<input type="checkbox"/>	People ever enrolled in BCO The list and count of participants checked as BCO clients on the Case Record with a date in the "BCO Start Date" field on the Case Record that is before or on the last day of last month.	FOC Bridges to Career Opportunity	Rendon, Carolina
<input type="checkbox"/>	People who began a bridge program The list and count of BCO participants who began a contextualized bridge education program during the report period	FOC Bridges to Career Opportunity	Rendon, Carolina
<input type="checkbox"/>	People who began an occun skills/collare		

Bridges to Career Opportunities

 Participants who obtained a credential

Report Generation Status: Complete

Report Options:

Summarize information by: Home Site Name 3 Show: All case records

2 **Hide Details** optional

Time Frame

Date Field: Date degree/certificate/license obtained 1 Range: Custom

From: 2/1/2017 To: 1/31/2018

Run Report Show Details Customize Save As Printable View Export Details

Filtered By:
BCO Client equals True Clear
AND Education: Record Type equals Degree/Certificate/License Clear

Grouped By: Home Site Name Industry focus
Sorted By: Home Site Name ↑ Industry focus ↑

of credentials

	Unduplicated ID
<input type="checkbox"/> Home Site Name: (103 records)	62 ← # of clients
Industry focus: 31-0000 Healthcare Support Occupations (35 records)	35
Industry focus: 41-0000 Sales and Related Occupations (12 records)	7
Industry focus: 51-0000 Production Occupations (56 records)	20
Grand Totals (103 records)	62

Check rows to filter, then drill down by: --None-- **Drill Down**

Customizing Reports



LISC/Salesforce Structure



CONTACT/CLIENT RECORD

- Demographics
- Contact Info
- *At Program Entry Info*

HOUSEHOLD (HH)

- Member Info
- HH Gross Income

Education

- Certificate/Degree/License
- Education/Training

Employment

- Placements
- Advancements

CASE RECORD

Direct Services

- Service Entries
- Group Services
- Progress Notes

Assessments

- Combined Fin Assessment
- Testing

Report Builder

The screenshot shows the Salesforce Report Builder interface. At the top, there is a search bar and the Salesforce logo. Below that, the report title is "Report Type: Case Records with Client" and "Unsaved Report". A toolbar contains buttons for "Save", "Save As", "Close", "Report Properties", "Add Report Type", and "Run Report".

On the left, a "Fields" panel is visible, containing a "Quick Find" search box and a list of fields under "Bucket Fields" and "Case Record: Info". A yellow highlight is over the "Quick Find" box, and a red callout '5' points to the "Fields" header.

In the center, the "Filters" section includes an "Add" button, a "Show" dropdown menu set to "All case records", and a "Date Field" section with "Admit Date" selected, a "Range" dropdown set to "All Time", and "From" and "To" date pickers. A red callout '6' points to the "Filters" header, '3' points to the "Show" dropdown, and '4' points to the "Date Field" section.

At the bottom, the "Preview" section shows a warning message: "The query for the preview is taking too long. Consider adding filters to narrow your results." Below the warning is a table with columns "Case Record: Case Name" and "Client: Last Name", and a "Grand Totals (0 records)" row. A red callout '2' points to the "Preview" header.

5 To bring a new data field into the report “click and drag” onto the preview section.

- 1 Report Type:
Joined data source
- 2 Preview:
Displays of the report (max: 50 records)
- 3 Show:
Select show “all”
- 4 Date Field:
Select the applicable date along with the time frame
- 5 Fields:
Available Data fields
- 6 Filters:
Narrows down data
- 7 Run Report:
Click to generate full report count.

Questions

Contact Information:

technical support email, FFTFOCSupport@lisc.org

Carolina Rendon, crendon@lisc.org

Caroline Rendon, ctrendon@lisc.org

Tamika Evans, tevens@lisc.org

Weekly FFT SF Technical Support Hours:

Every Monday, 1-2p CST, invite lives on the new FOC website,

<http://www.foc-network.org/>

Bring your questions to the support session and review how to enter data in FFT Salesforce.

