

Salesforce: Understanding Standard and Customized Reports

November 28, 2017

FOC Network Webinar



- 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.

Jackie Guzman is an assistant program officer with LISC's Family Income and Wealth Building team. She helps support the team with database management and grants/compliance management. In her role she helps monitor the FFT FOC Support email and host the weekly Salesforce support hours. Prior to joining the team she was an AmeriCorps member and later Program coordinator at a Chicago FOC (Jane Addams Resource Corporation).



Standard FOC Reports and Dashboards

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



FOC Employment Counseling Dashboard

Find a dashboard... Refresh As of Today at 10:33 AM

People Placed in Jobs (all types)

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

People Achieving Retention in Same Job

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

Employment Counseling Topics

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

Average Starting Hourly Wage (unsub)

This calculates the average of the starting wage for unsubsidized placements.

People Achieving Retention in Same Job

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

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

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

Reports & Dashboards

FOC Employment Counseling

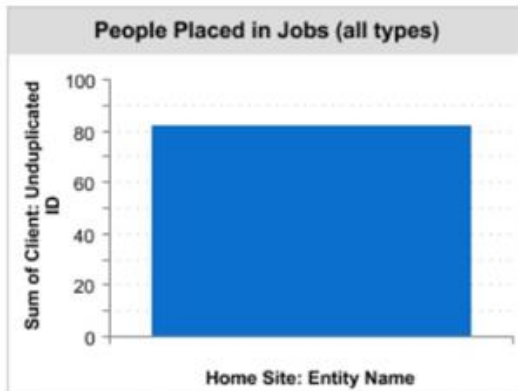
Folder	Report	Folder	Owner
FOC Reports	Average Starting Hourly Wage (unsub)	FOC Employment Counseling	Patricia, LUSIG Support
FOC Reports	Education/Training to be Awarded - Avg	FOC Employment Counseling	Scottie, Scottie
FOC Reports	Employment Counseling Topics	FOC Employment Counseling	Patricia, LUSIG Support
FOC Reports	People Achieving Retention in Same Job	FOC Employment Counseling	Patricia, LUSIG Support
FOC Reports	People Placed in Jobs (all types)	FOC Employment Counseling	Patricia, LUSIG Support
FOC Reports	Undup # achieving retention in same job	FOC Employment Counseling	Patricia, LUSIG Support

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

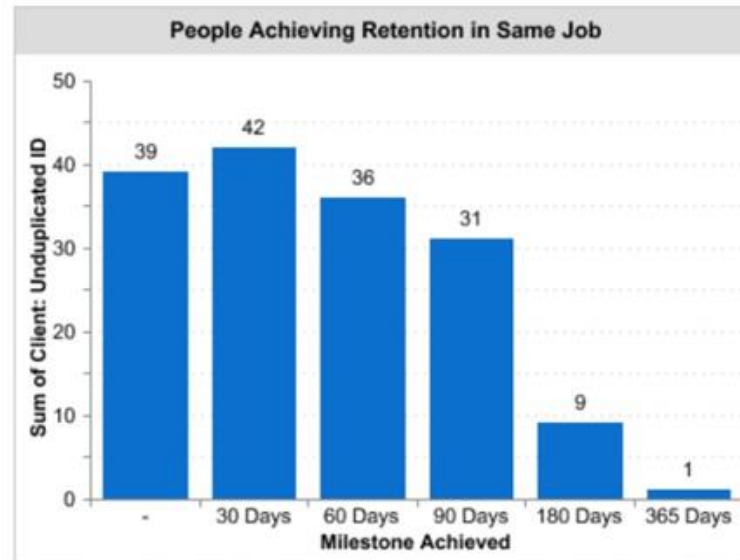


To see the unduplicated count of participants placed in jobs, please see the details under the report.

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

Average Starting Hourly Wage (unsub)

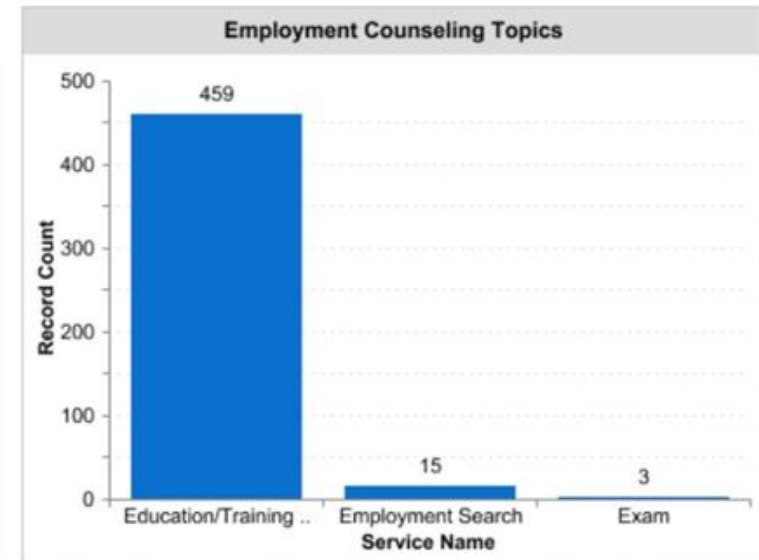
This calculates the average of the starting wage for unsubsidized placements.: **\$13**



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...

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

1

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](#)

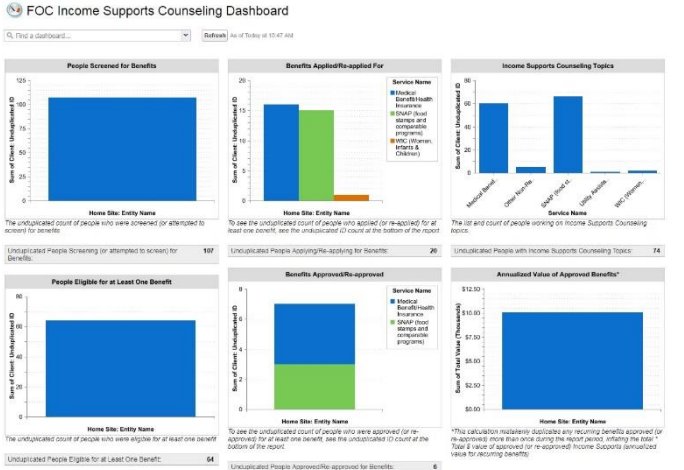
Grouped By: Home Site: Entity Name Sorted By: Home Site: Entity Name ↑

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*



Reports & Dashboards

FOC Income Supports Counseling

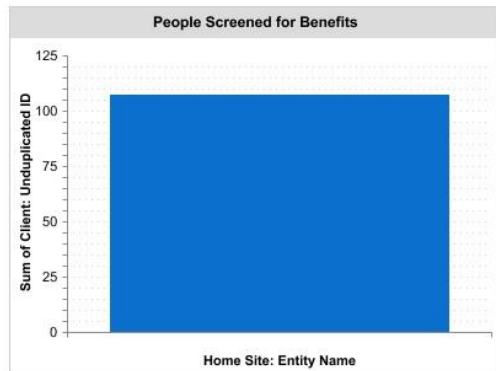
Action	Name	Folder	Created By
+	Annualized Value of Approved Benefits*	FOC Income Supports Counseling	Outback, J (RSC) Outback
+	Benefits Applied/Re-applied For	FOC Income Supports Counseling	Outback, J (RSC) Outback
+	Benefits Approved/Re-approved	FOC Income Supports Counseling	Outback, J (RSC) Outback
+	Income Supports Counseling Topics	FOC Income Supports Counseling	Outback, J (RSC) Outback
+	People Eligible for at Least One Benefit	FOC Income Supports Counseling	Outback, J (RSC) Outback
+	People Screened for Benefits	FOC Income Supports Counseling	Outback, J (RSC) Outback

*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

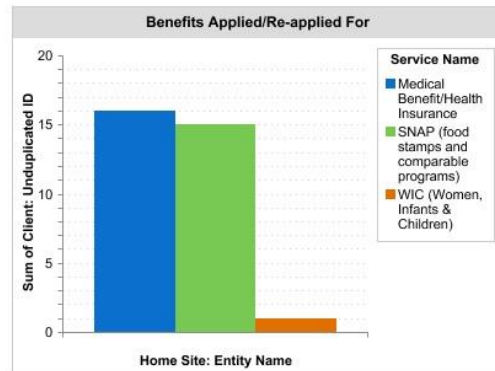
FOC Income Supports Counseling Dashboard - CY 2017 (data displayed based on last refresh)

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



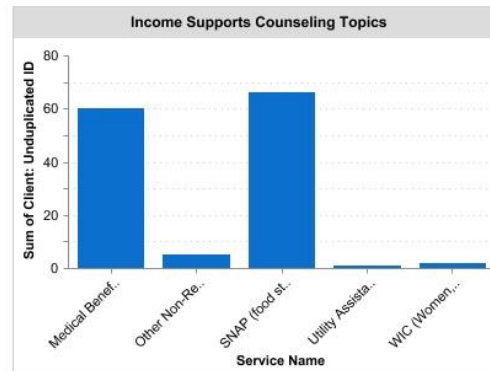
The unduplicated count of people who were screened (or attempted to screen) for benefits

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



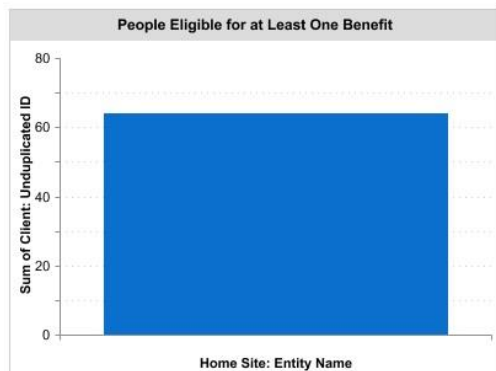
To see the unduplicated count of people who applied (or re-applied) for at least one benefit, see the unduplicated ID count at the bottom of the report.

Unduplicated People Applying/Re-applying for Benefits: **20**



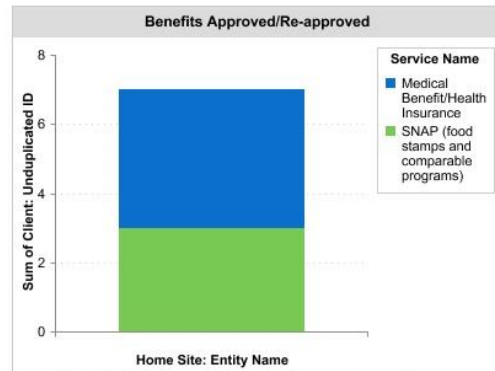
The list and count of people working on Income Supports Counseling topics.

Unduplicated People with Income Supports Counseling Topics: **74**



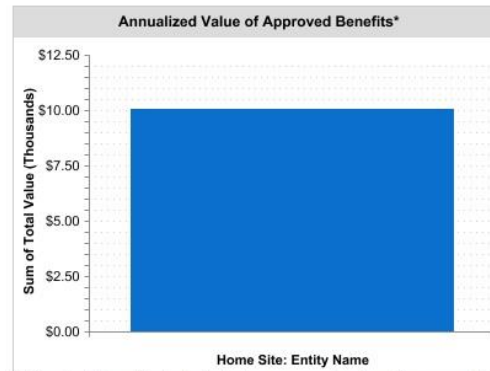
The unduplicated count of people who were eligible for at least one benefit

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...](#)

Folders

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

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

filter criteria

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	1
FOC 6/2017 Case Record	1	1
FOC 6/2017 Case Record	1	1
FOC 6/2017 Case Record	1	1
FOC 6/2017 Case Record	1	1
FOC 6/2017 Case Record	1	1
FOC 6/2017 Case Record	1	1
FOC 6/2017 Case Record	1	1
FOC 6/2017 Case Record	1	1
FOC 6/2017 Case Record	1	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 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

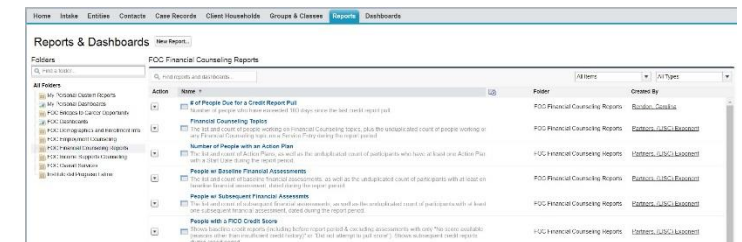
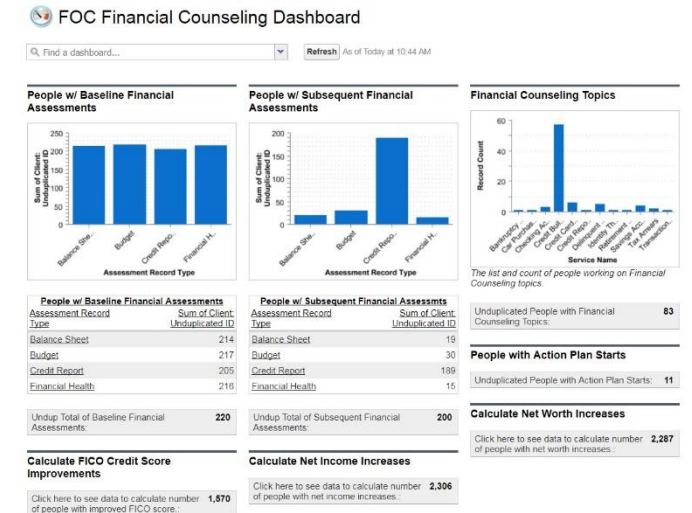
of people

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	FOC 8/2017 Case Record		Income Supports Counseling
	1				FOC 6/2017 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 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*



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

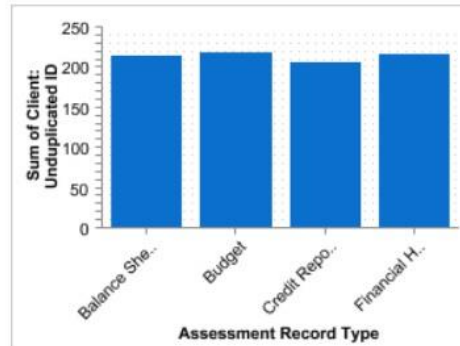
Financial Counseling

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



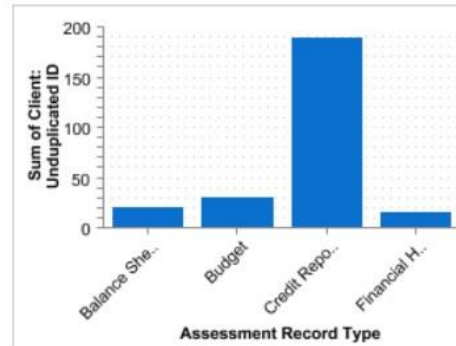
People w/ Baseline Financial Assessments	
Assessment Record Type	Sum of Client Unduplicated ID
Balance Sheet	214
Budget	217
Credit Report	205
Financial Health	216

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



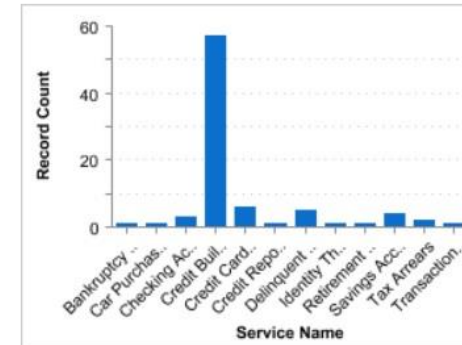
People w/ Subsequent Financial Assessments	
Assessment Record Type	Sum of Client Unduplicated ID
Balance Sheet	19
Budget	30
Credit Report	189
Financial Health	15

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...](#)

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 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 on 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: Case Record 18-digit ID Show All case records

Time Frame: Date Field: Assessment Date Range: Custom From: To:

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

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)
Case Record 18-digit ID: a0t3600t (1 record)				1	
FOC 2/2017 Case Record	Assessment -941655	9/21/2015	Baseline	1	\$260.00
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

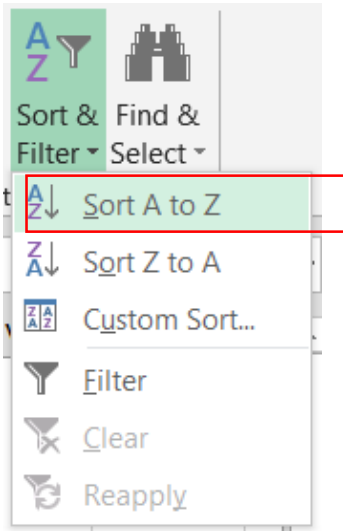
Grouped By:
 Sorted By:

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

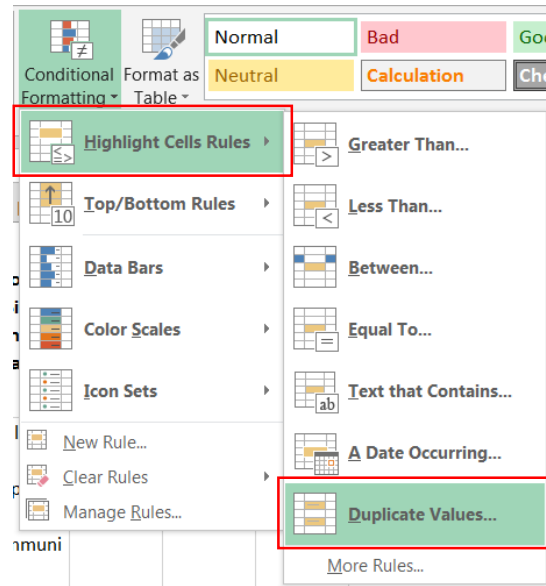
Financial Counseling



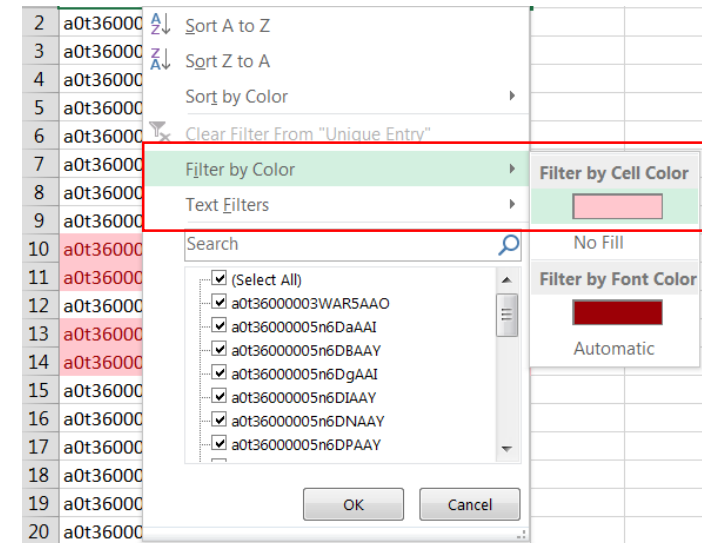
Tips to calculate increases:



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	

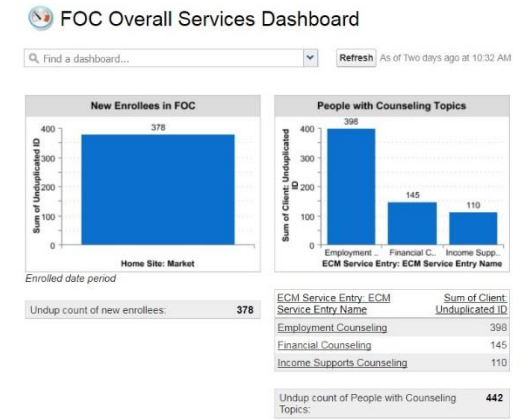
4. Use a formula to calculate increase

=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



Reports & Dashboards

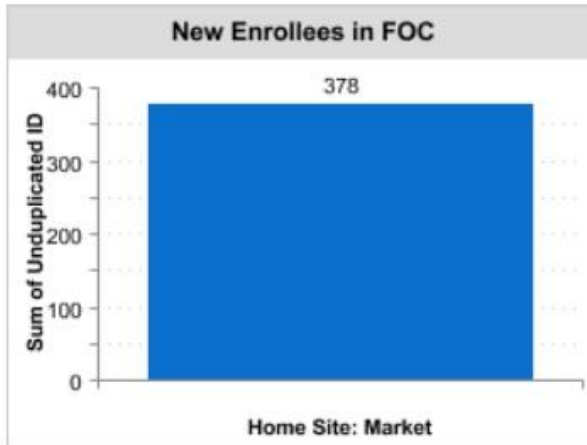
Folder	Active	Name	ID	Filter	Created By
FOC Overall Services	Active	All Enrollment Information			Debbie Coakley
FOC Overall Services	Active	Demographic for FOC overall clients			Debbie Coakley
FOC Overall Services	Active	New Enrollees in FOC			Debbie Coakley
FOC Overall Services	Active	People with at least one Counseling SE			Debbie Coakley
FOC Overall Services	Active	People with counseling services			Debbie Coakley
FOC Overall Services	Active	Total # of people with specific 219 type			Debbie Coakley

Overall Services

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

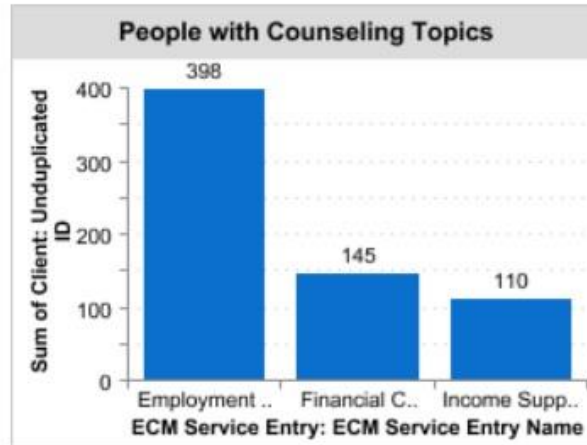
Find a dashboard...

Refresh As of Two days ago at 10:32 AM



Enrolled date period

Undup count of new enrollees: **378**



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**

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
▼	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
▼	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
▼	FOC contact list (for reference) Contact information for clients enrolled in the FOC.	FOC Overall Services	Rendon, Carolina
▼	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
▼	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
▼	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
▼	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:

Run Report
Hide Details
Customize
Save As
Printable View
Export Details

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
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

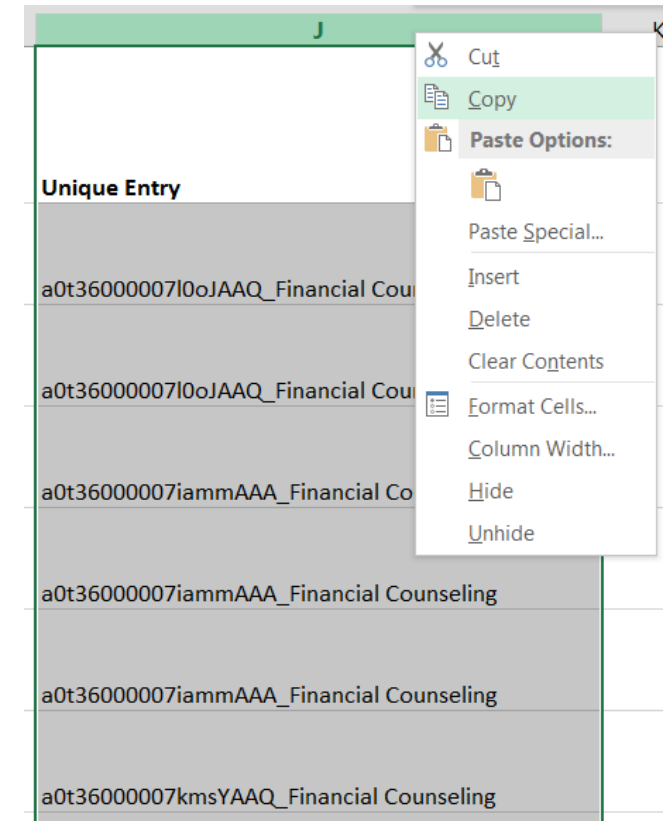
Tips to calculate interim bundling (2/3 and 3/3):



	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

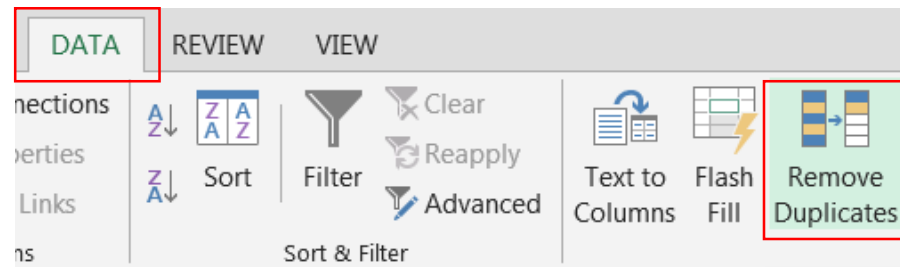
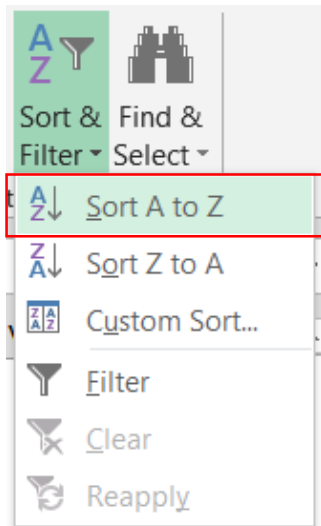


2. Copy column and Paste (values) into a new sheet

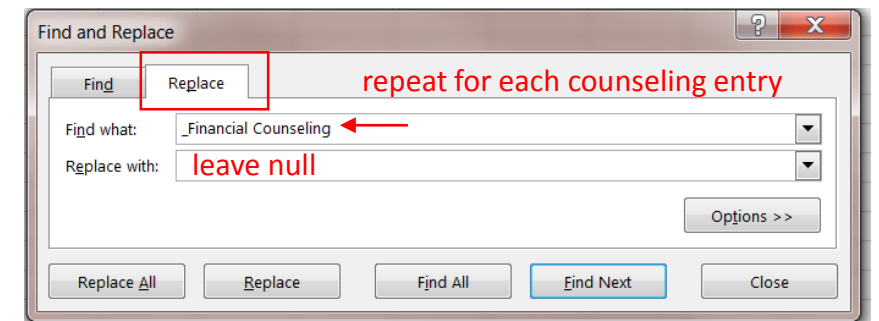
Overall Services



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



3a. De-duplicate values



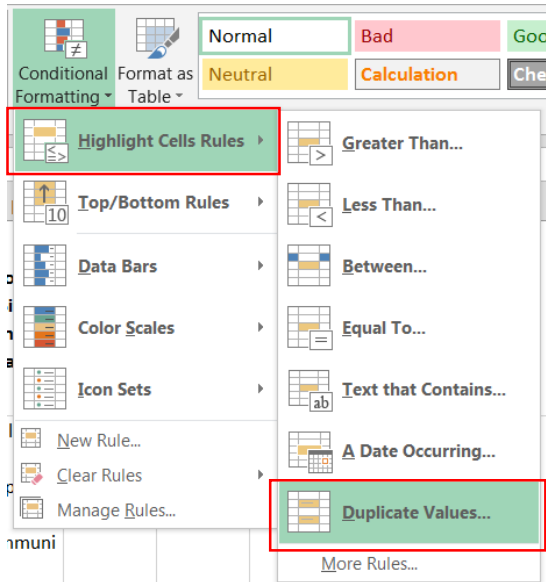
4. Remove the *counseling* text using "Find and Replace" (ctrl+F)

On the new sheet:

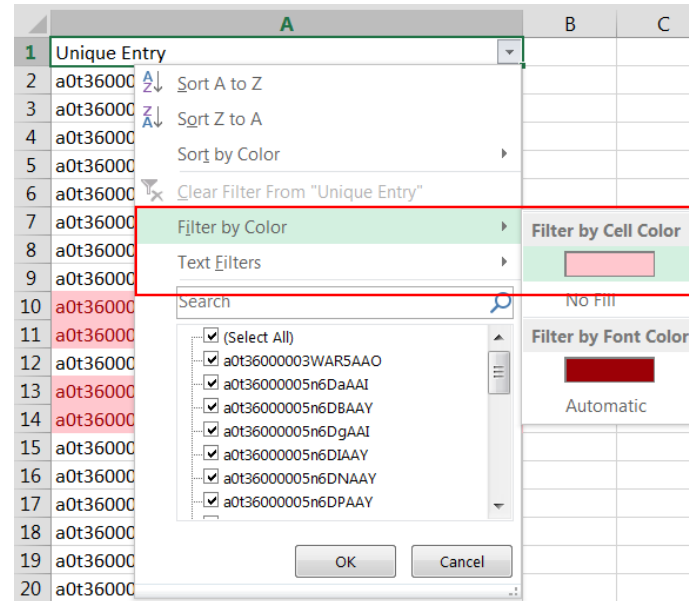
3. Sort Unique Entries

Overall Services

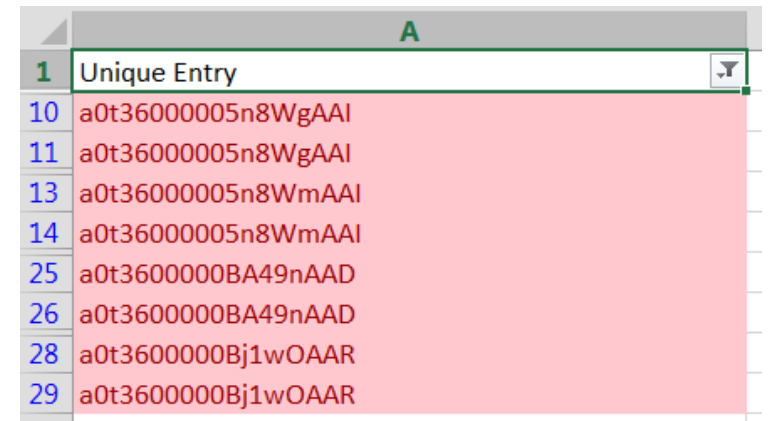
Tips to calculate interim bundling (2/3 and 3/3):



5. Highlight duplicates (red)



5a. Filter by color (red)

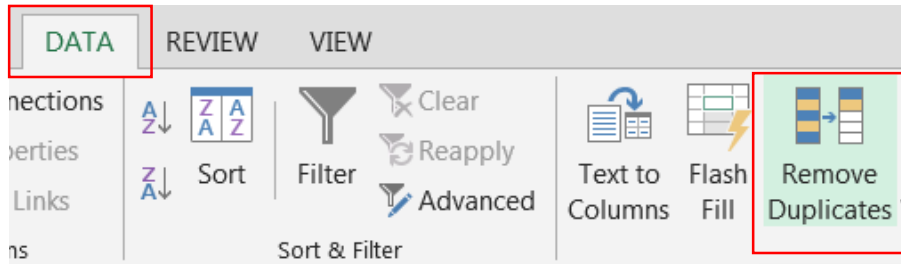


6. Copy column and Paste (values) into a new sheet

Overall Services



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



	A
1	Unique Entries
2	a0t36000005n8WgAAI
3	a0t36000005n8WmAAI
4	a0t3600000BA49nAAD
5	a0t3600000Bj1wOAAAR
6	=COUNTIF(A2:A5,"*")
7	

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

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*



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

Bridges to Career Opportunities

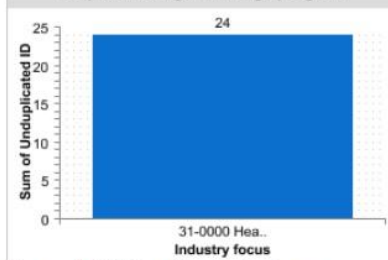
FOC Bridges to Career Opportunities - SIF Term¹ (data displayed based on last refresh)

Find a dashboard... Refresh As of Two days ago at 11:27 AM

Number of people enrolled in BCO: **80**

The 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.

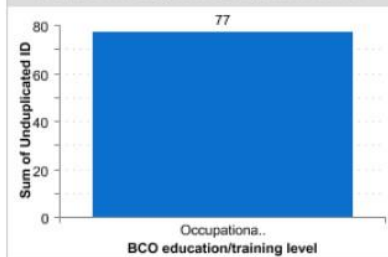
People who began a bridge program



The count of BCO participants who began a contextualized bridge education program during the report period.

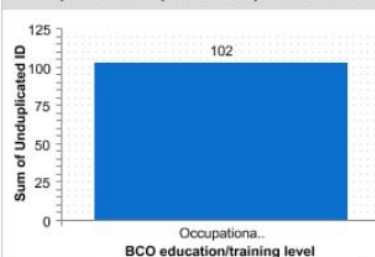
Unduplicated # of people who began a bridge program: **24**

People who began an occupational skills



BCO participants who began an occupational skills or college degree program (e.g. vocational training, nursing program, etc.).

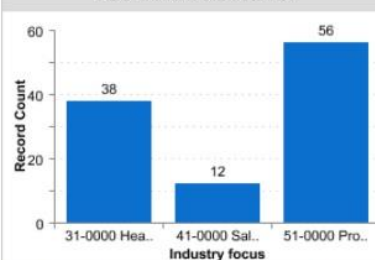
People who completed occupational skills



BCO participants who completed an occupational skills or college degree program (e.g. vocational training, nursing program, etc.).

Unduplicated # of people who completed an occup skills/college degree program: **102**

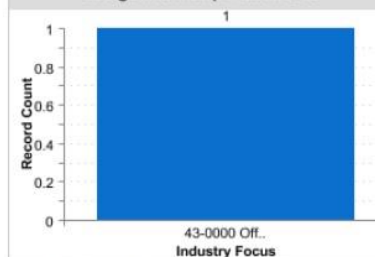
BCO credentials obtained



The count of BCO degree/certificate/license obtained during the report period.

Unduplicated # of people who obtained a credential: **65**

Bridge Internship Placements

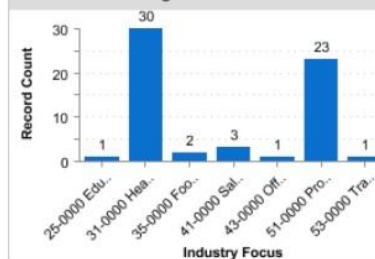


BCO participants placed in internships.

Unduplicated # of people placed in internships: **1**

The count of BCO participants placed in internships during the report period.

Bridge Placements



BCO participants placed in jobs overall (including those who obtained employment outside of the targeted career pathway).

Unduplicated # of people placed in jobs: **56**

The count of BCO participants placed in jobs overall (including those who obtained employment outside of the targeted career pathway) during the report period.

Bridges to Career Opportunities

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

Reports & Dashboards New Report...

Folders

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

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
	People who began an occun skills/collare		

1-11 of 11 Previous Next Page 1 of 1

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

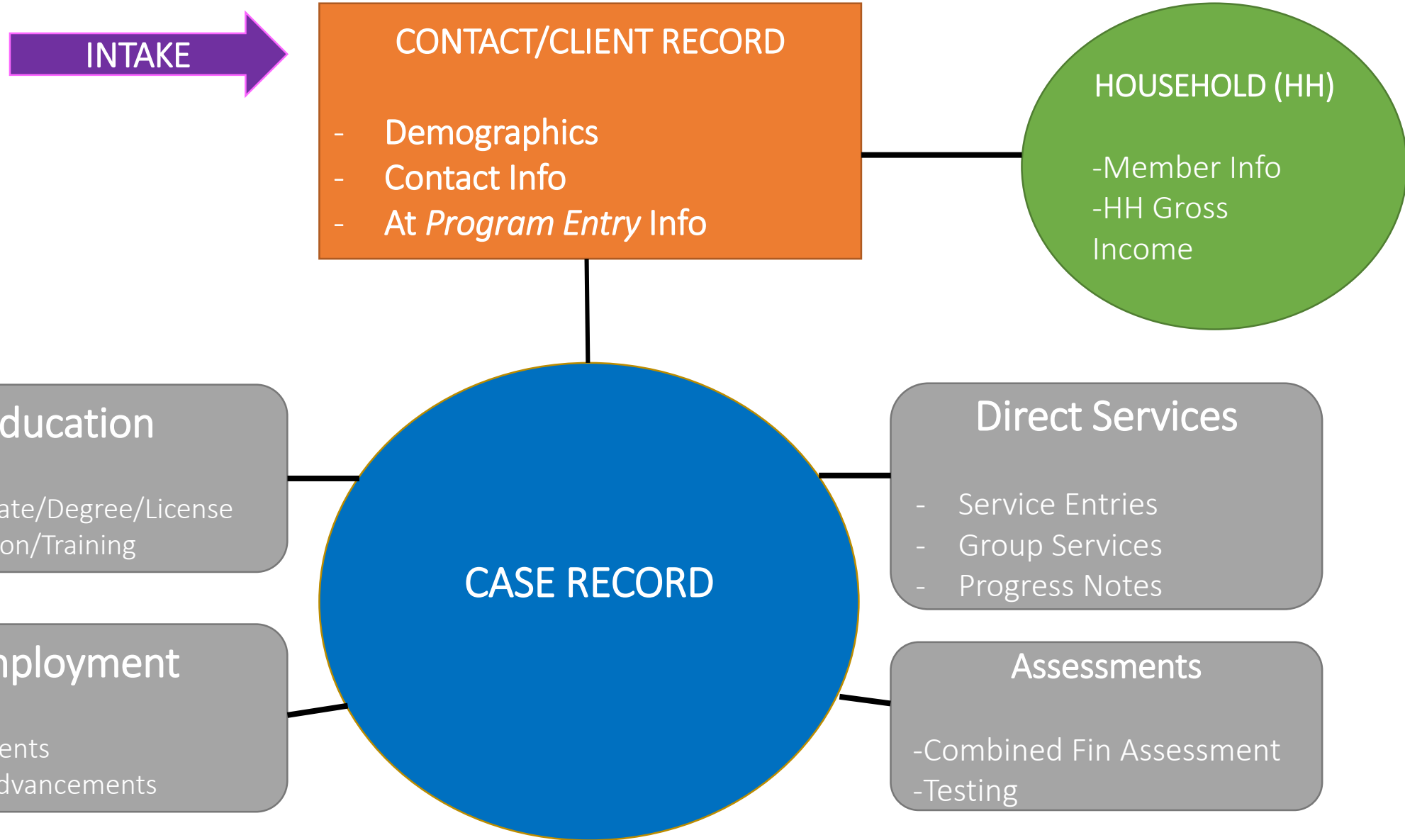
	Unduplicated ID
<input type="checkbox"/> Home Site Name: (103 records)	62 ← # of clients
Industry focus: 31-0000 Healthcare Support Occupations (35 records)	35
Industry focus: 41-0000 Sales and Related Occupations (12 records)	7
Industry focus: 51-0000 Production Occupations (56 records)	20
Grand Totals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

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

Customizing Reports



LISC/Salesforce Structure



Reporting Exercises



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". The interface includes several buttons: "Save", "Save As", "Close", "Report Properties", "Add Report Type", and "Run Report".

On the left side, there is a "Fields" panel with a "Quick Find" search bar and a list of fields. A yellow highlight is over the "Quick Find" bar, and a red callout '5' points to the "Fields" header. A red callout '4' points to the "Drag and drop to add fields to the report" instruction.

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

At the bottom, there is a "Preview" section with a "Tabular Format" dropdown, a "Show" dropdown, and a "Remove All Columns" button. A red callout '2' points to the "Preview" header. Below that, there is a yellow warning message: "The query for the preview is taking too long. Consider adding filters to narrow your results." Below the warning, there is a table with two columns: "Case Record: Case Name" and "Client: Last Name". The table shows "Grand Totals (0 records)" and a message: "No data was returned. Check report filters." A red callout '7' points to the "Run Report" button.

- 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.

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

Questions

Contact Information:

Technical support email, FFTFOCSupport@lisc.org

Carolina Rendon, crendon@lisc.org

Caroline Rendon, ctrendon@lisc.org

Jackie Guzman, jguzman@lisc.org

Weekly FFT SF Technical Support Hours:

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

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

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

