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Admin Fundamentals for Education

Reports & Dashboards

Part 3 of 5



This webinar will begin shortly

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Our Admin Fundamentals Journey

Fundamentals for Education

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EDA Deep Dive

Understand EDA functionality

Constituent Engagement

Learn how to engage your constituents

Reports & Dashboards

Use data to make decisions

Setup & Automate Cases

Build a supportive infrastructure

Automate with Flow

Learn how to automate

Agenda

What we'll cover today

1. Data Quality and Why it Matters
2. Create Functional Reports
3. Visualize Data with Dashboards
4. 5 Features to Optimize Reporting
5. Next Steps & Resources



Data Quality and Why it Matters



Why is Quality Data a Big Deal?

- Data decides where your organization invests
- It dictates the emails you send - as well as when, and how you send them
- It informs your conversations with students, alumni and donors
- It drives what needs to be done next

What is “Bad” Data?

Data quality can be measured by many criteria

Criteria	Questions to Consider
Accuracy	Does data correctly describe the “real world” object or event?
Completeness	Are all data points captured across all records?
Consistency	Are all data points captured in the same way across all records?
Timeliness	Is your data time-sensitive? Does it need to be archived after a certain period?
Uniqueness	Are all records unique? No duplicates?
Validity	Does data conform to the syntax (format, type, range) of its definition?

How Do Data Quality Issues Occur?

"Bad" Data can occur due when:

- Users have little or poor training
- There's no automated prevention in place
- Data hygiene policies are lacking
- Historical data is imported



Steps to Manage Data Quality

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#1 Learn

Trailhead:
Data Quality Module

#2 Assess

AppExchange:
Data Quality Analysis Dashboard

#3 Develop a Plan

Trailhead:
Improving Data Quality Module

Knowledge Article:
Data Hygiene Schedule and Actions for New Admins

#4 Clean your Data

Data Management Tools:
App Comparison Doc

H&T Article:
Salesforce Duplicate Management Tools

#5 Document

Blog:

5 Documentation Strategies to Improve Your Salesforce Org

Video:

Best Practices for Documenting Your Salesforce Org



For more tips on maintaining your data quality check out our Healthy Org Workbook

Create Functional Reports



What is a Report?

Ways to Understand Reporting

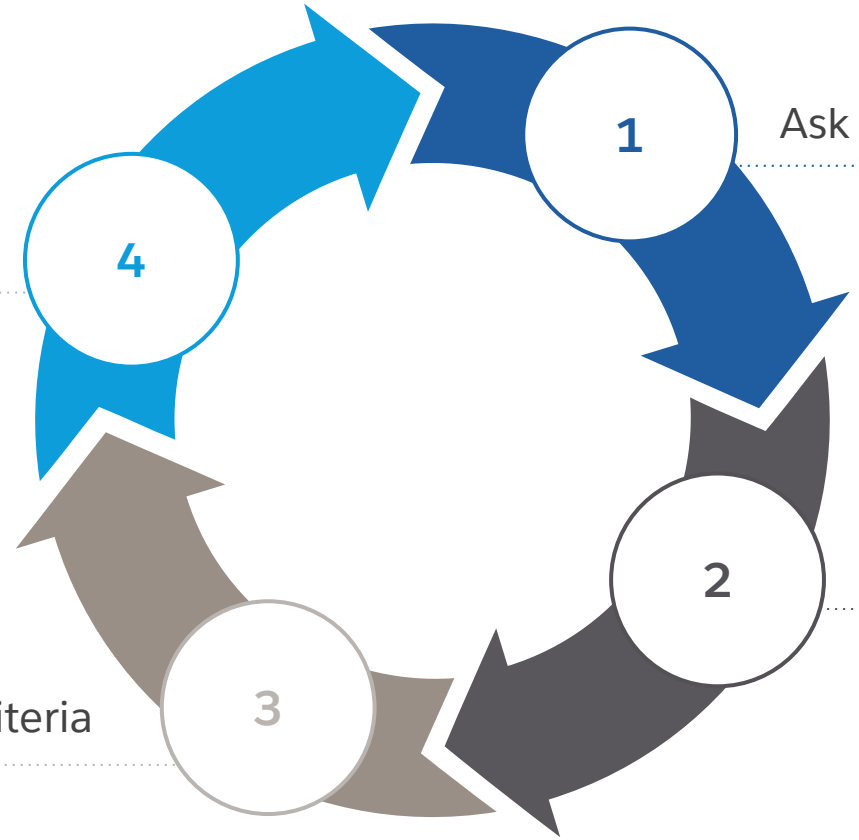


A Report **IS**:

- An answer to a question
- A tool to help make decisions

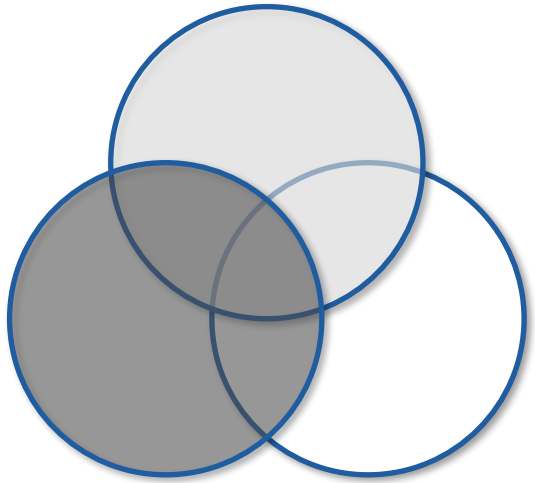
Convert Questions to Reports

Address Your Staff Needs



1. Ask follow-up questions
2. Write requirements
3. Map requirements to report criteria
4. Run report and deliver results

Three Things That Drive Every Report



Report Type

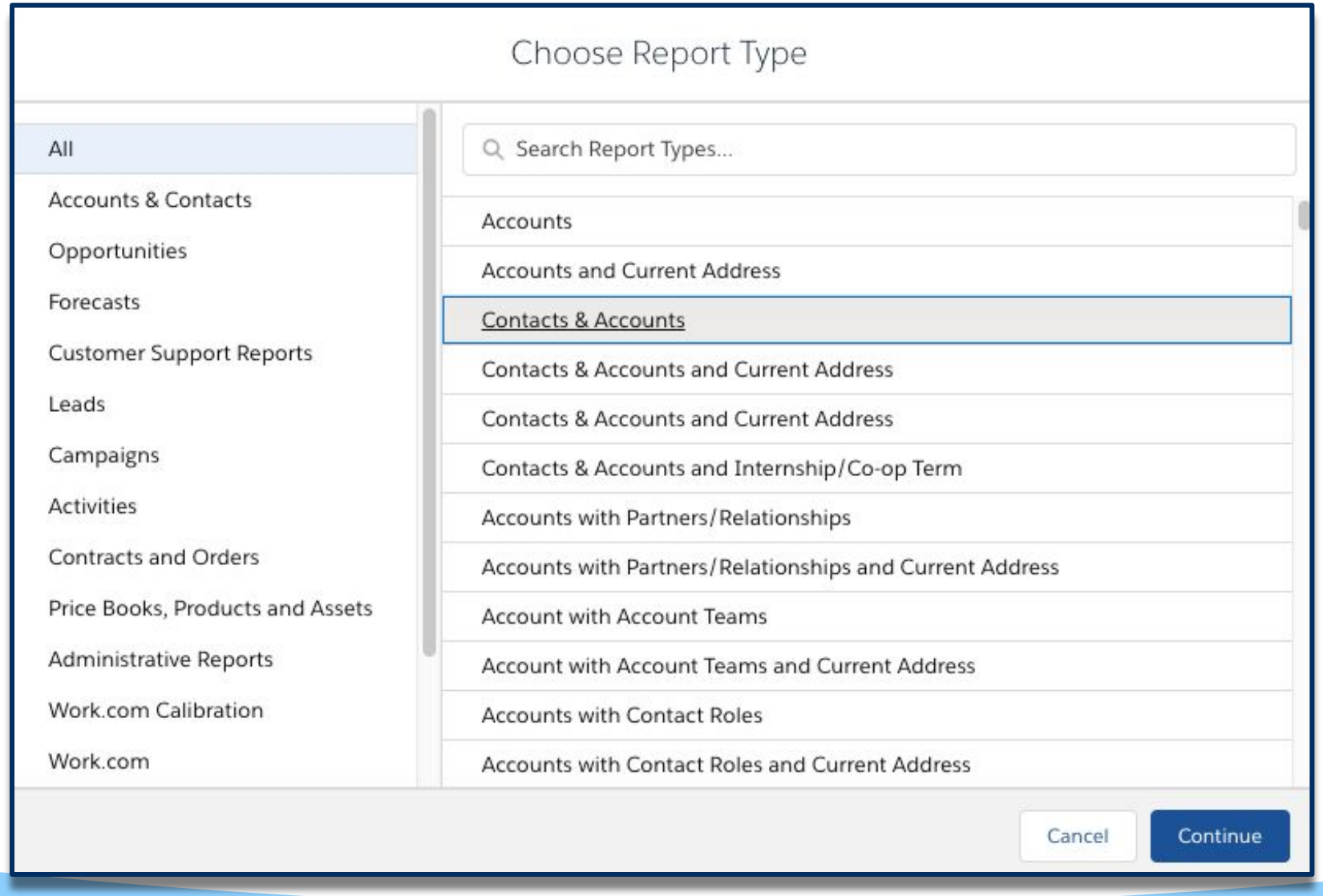


Filter Criteria



Format

Use Report Types to Build Faster



Types of Reports

1 Tabular

Report: Opportunities
Advancement: Donations by Campaign

Total Records
4

	Close Date	Probability (%)	Fiscal Period	Age	Created Date	Opportunity Owner
1	10/10/2019	90%	Q4-2019	0	3/7/2020	Valerie Northeast
2	10/8/2019	98%	Q4-2019	0	3/7/2020	Valerie Northeast
3	11/5/2019	90%	Q4-2019	0	3/7/2020	Ricky Southeast
4	1/30/2020	90%	Q1-2020	0	3/7/2020	Adrienne Advancement

2 Summary

Report: Program Enrollments with Contact
Program Enrollment by Class

Class Standing	Program	Contact: Last Name
Freshman (59)	BA Business Administration (16)	Hamilton
		Howell
		Nichols
		Mills
		Fisher
		Stanley
		Jenkins
		Reynolds
		Reed
		Harrison
		Murphy
		Lewis
		Griffin
		Payne
		Cunningham

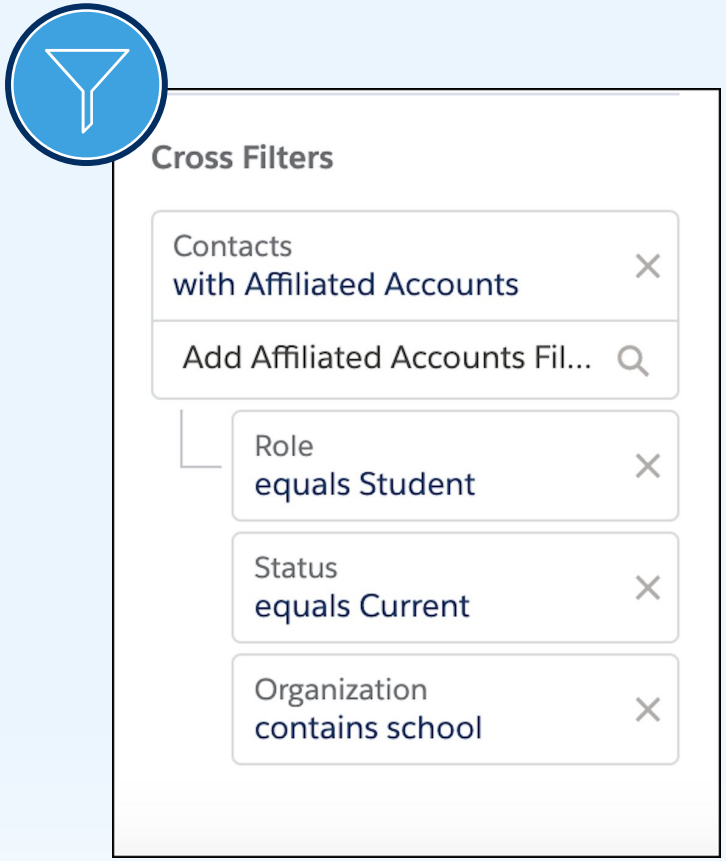
3 Matrix

Report: Leads
New Leads Report

Total Records
1,424

Lead Source	Industry	-	Agriculture	Apparel	Banking	Biotechnology	Chemicals	Communications
-	Record Count	435	0	0	10	0	0	11
Website	Record Count	3	2	3	2	1	2	0
Social Media	Record Count	10	6	2	4	3	3	9
Referral	Record Count	1	0	0	0	0	0	0
Data.com	Record Count	3	0	0	0	0	1	0
Partner	Record Count	0	0	0	0	0	0	0

Using Filters

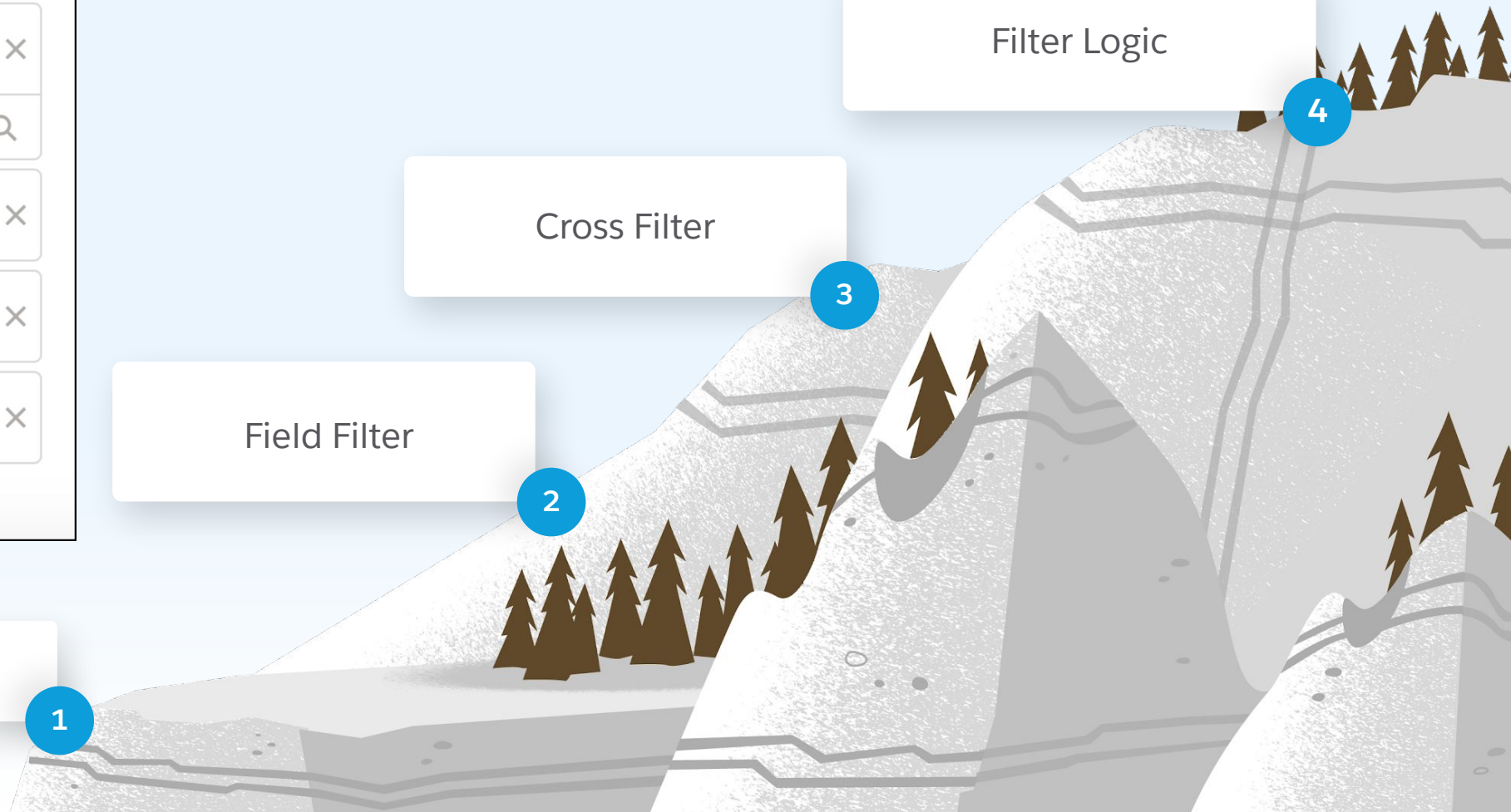


Filter Logic

Cross Filter

Field Filter

Standard Filter

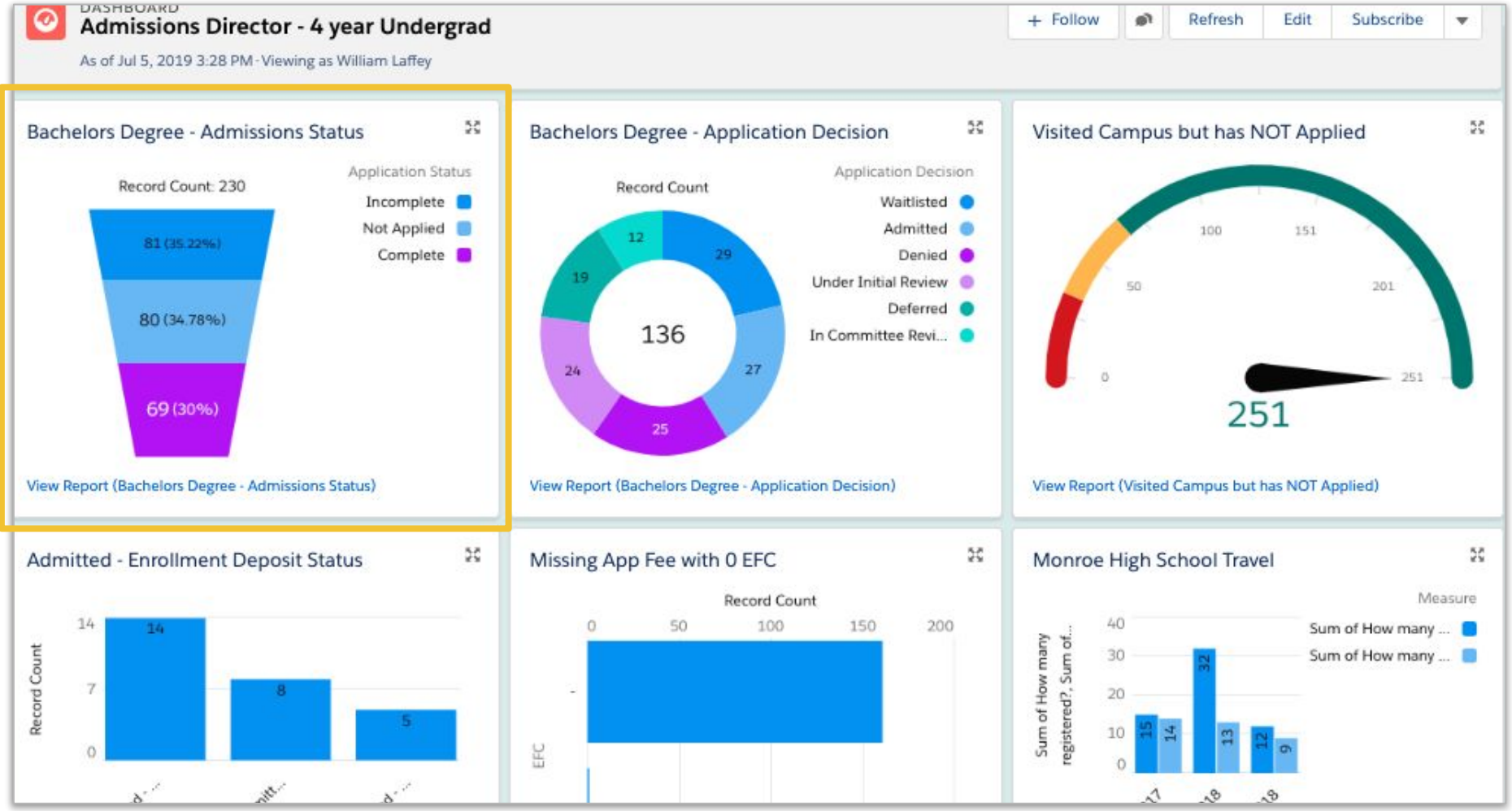


Visualize Data with Dashboards



Display Your Report Data

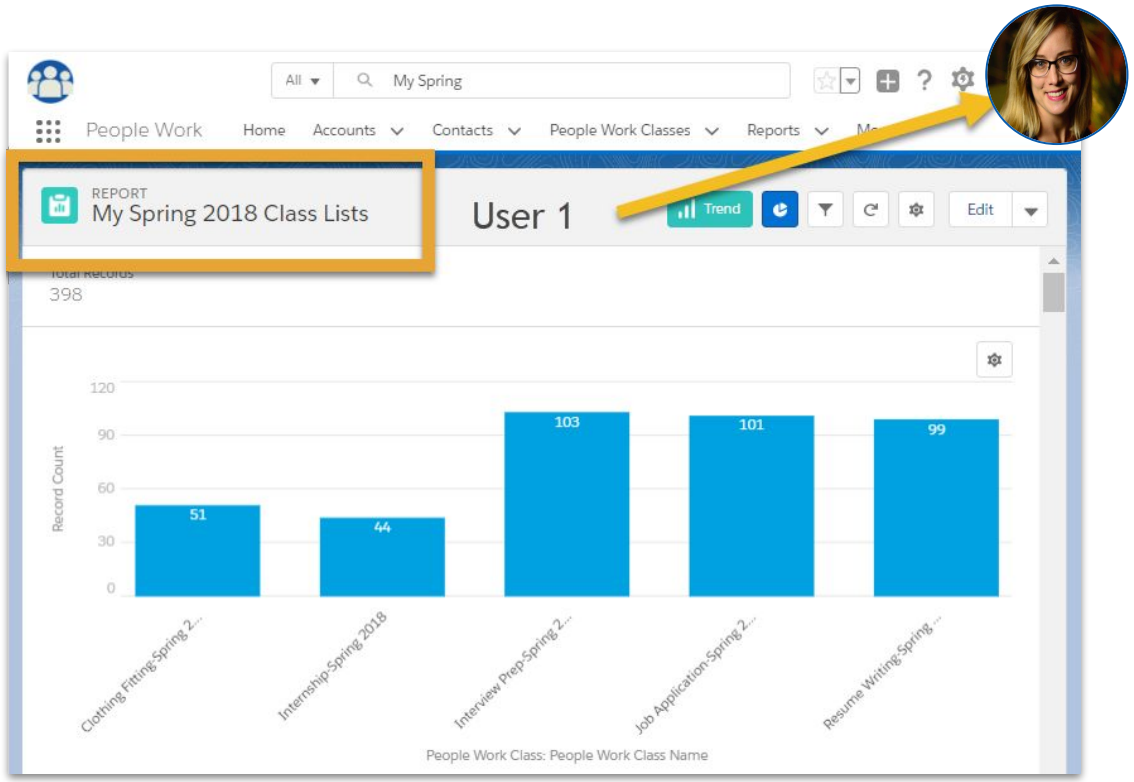
Dashboard Component

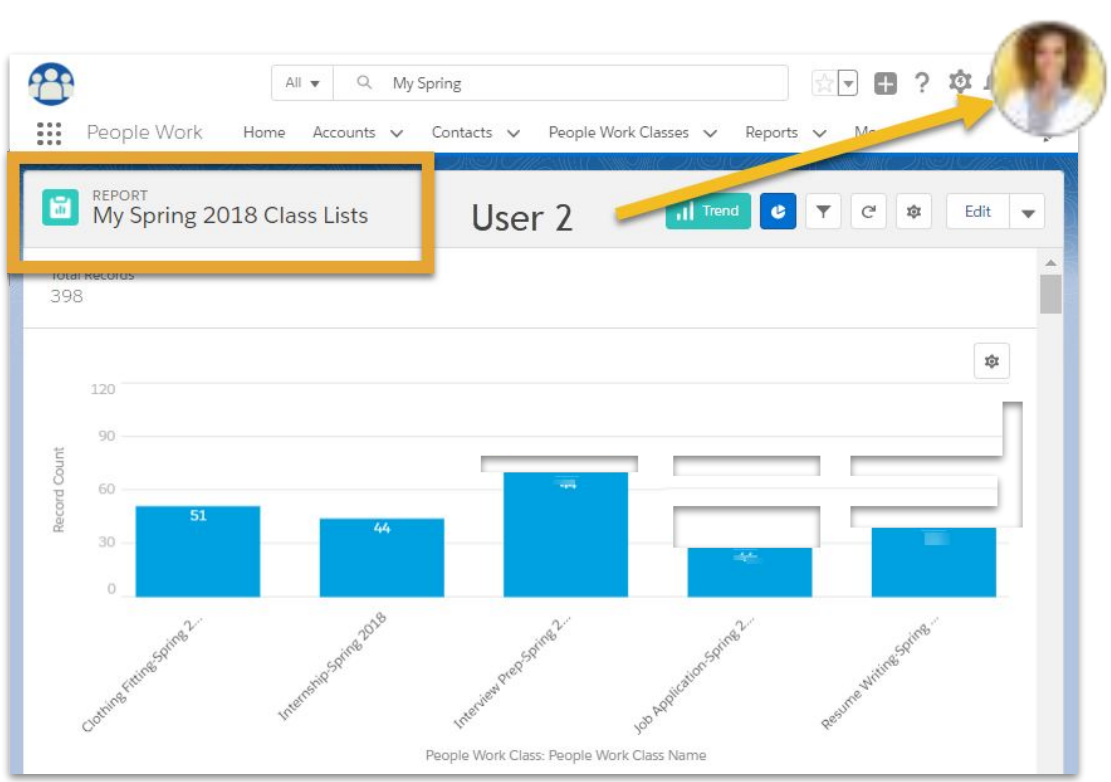


Plan Build Think

Protect Your Data

You need it and it's built in!



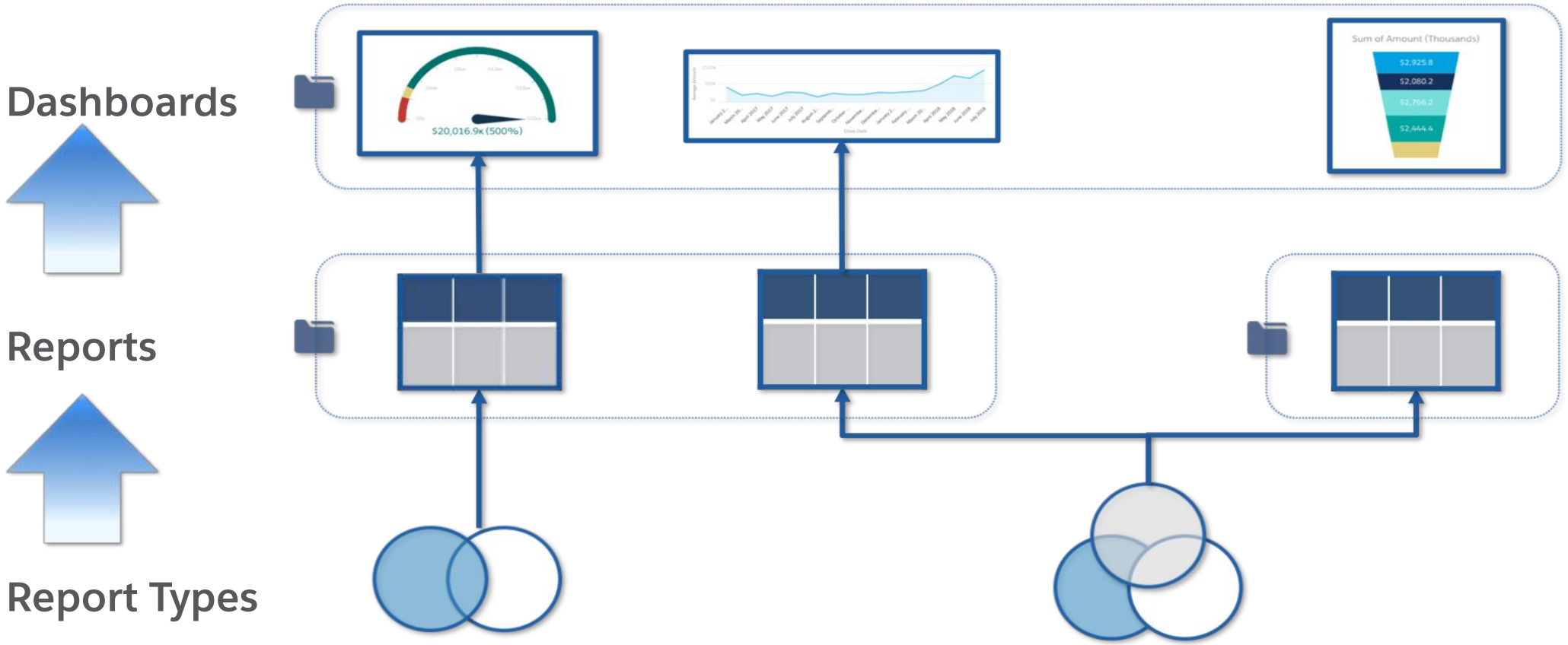


Dashboards and Reports honor your security model, so the same report may display different results to your users based on data ownership or user role.



Put it All Together

Used Together, You'll Get Stronger Data and Meaningful Insights

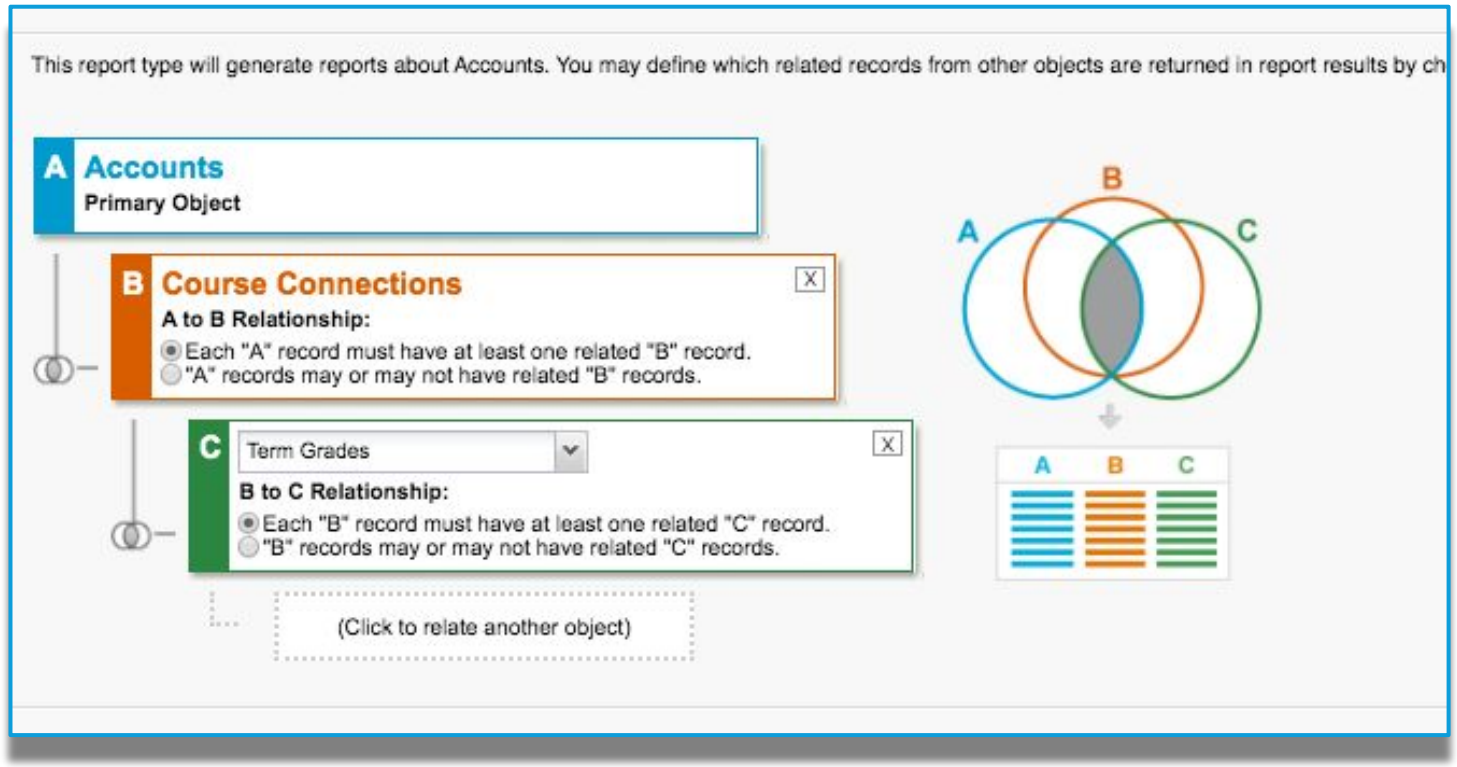


5 Features to Optimize Reporting



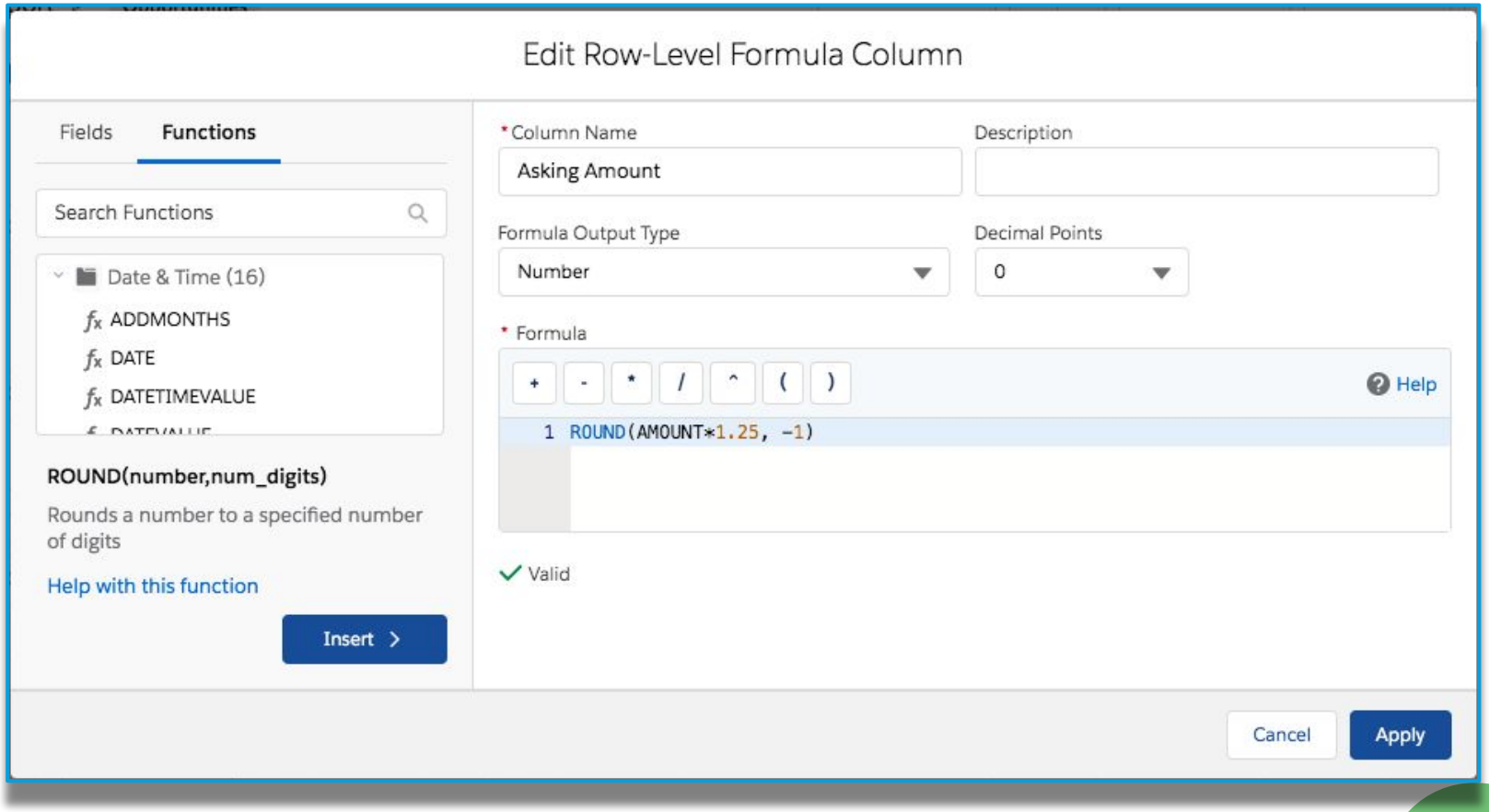
Custom Report Types

- Define the relationships between objects displayed to users creating and customizing reports
- Select which objects' fields can be used as columns in reports

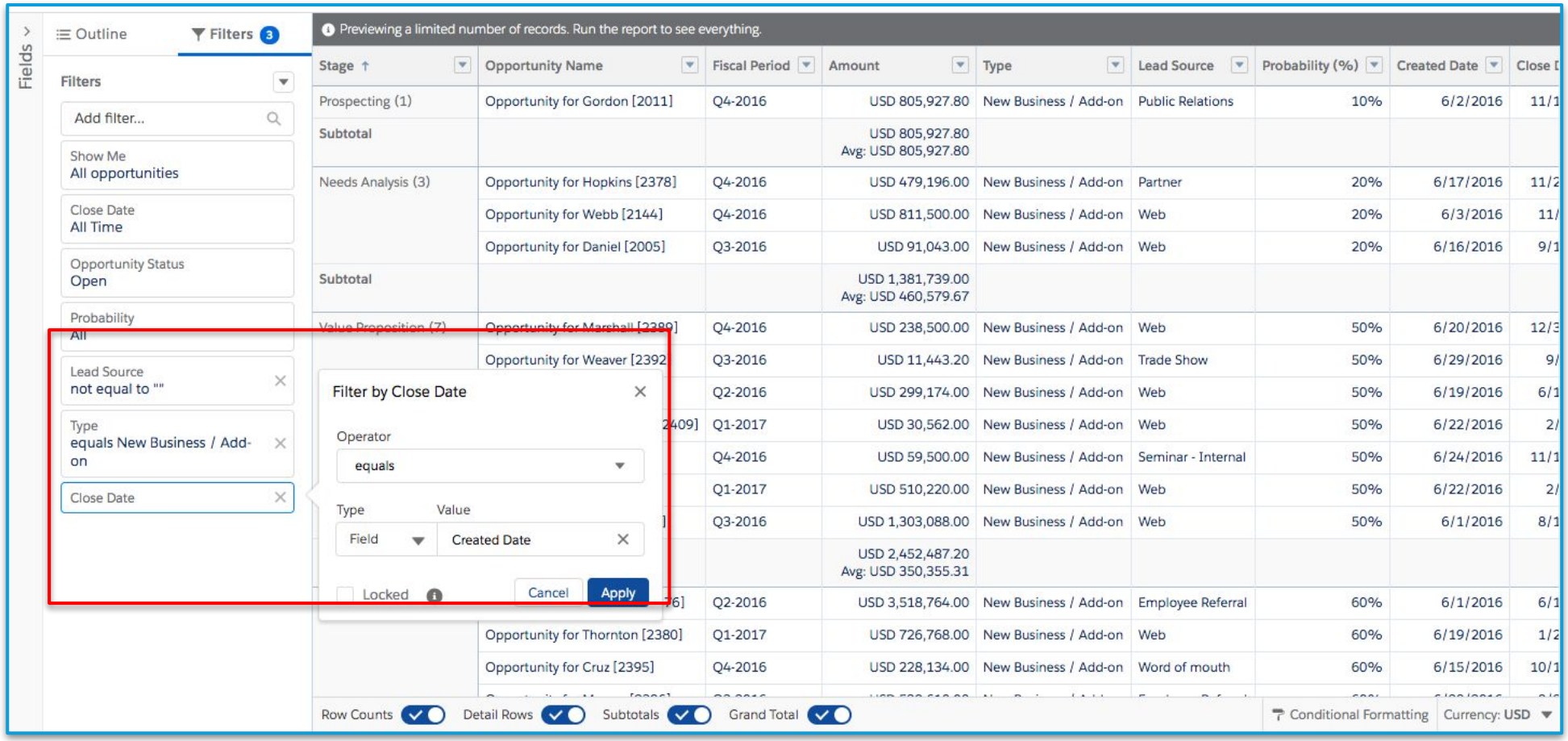


Row Level Formulas

- Reduce ‘clutter’ with less custom formula fields
- Calculate values for every record in a report



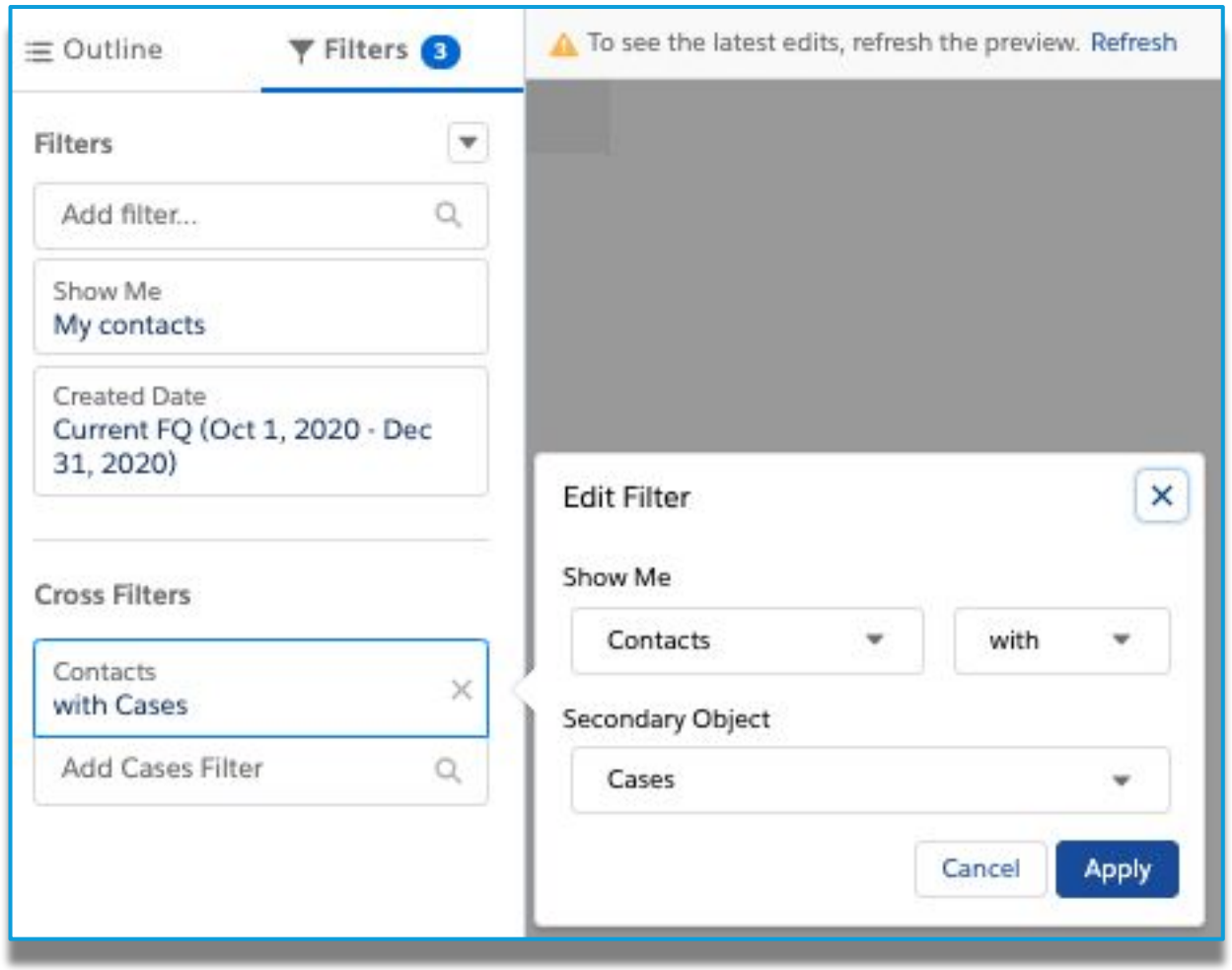
Field to Field Filtering



- Compare values for two report fields

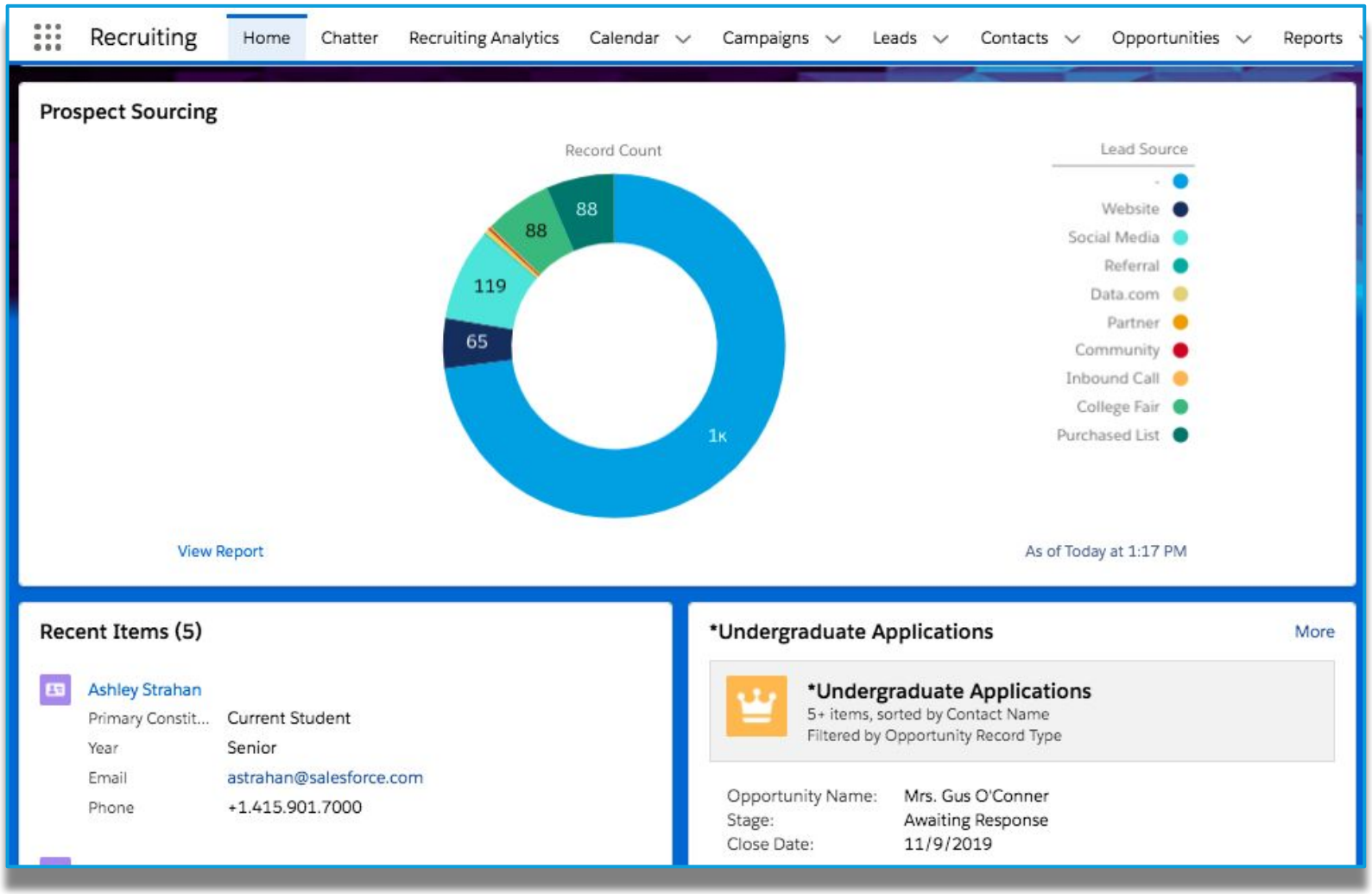
Cross Filters

- Increase trust in data by finding:
  - Missing information
  - Contradictory information
- No need to build custom report type!



Embedded Reports

- Surface important information in the Home page
- Easy way to check in on ongoing projects



It’s Demo Time!

Let’s look at Reports & Dashboards



Scenario: Cloudy University Student Services team would like to see which of their students have open cases with the Academic Advising team

Scenario: Cloudy University Advancement team would like to compare their donations to projections

Scenario: Cloudy University Admissions team would like to quickly see where their prospective students are coming from

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Recommendations

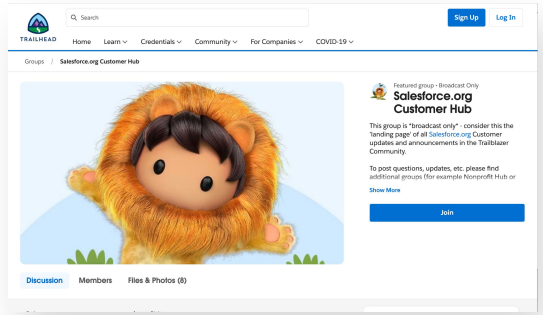
Learn next steps and discover helpful resources



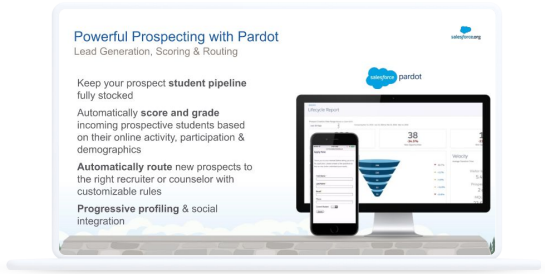
Three Things You Can Do Today

TRAILHEAD

[Explore Trailhead]



[Go to the Trailblazer Community]



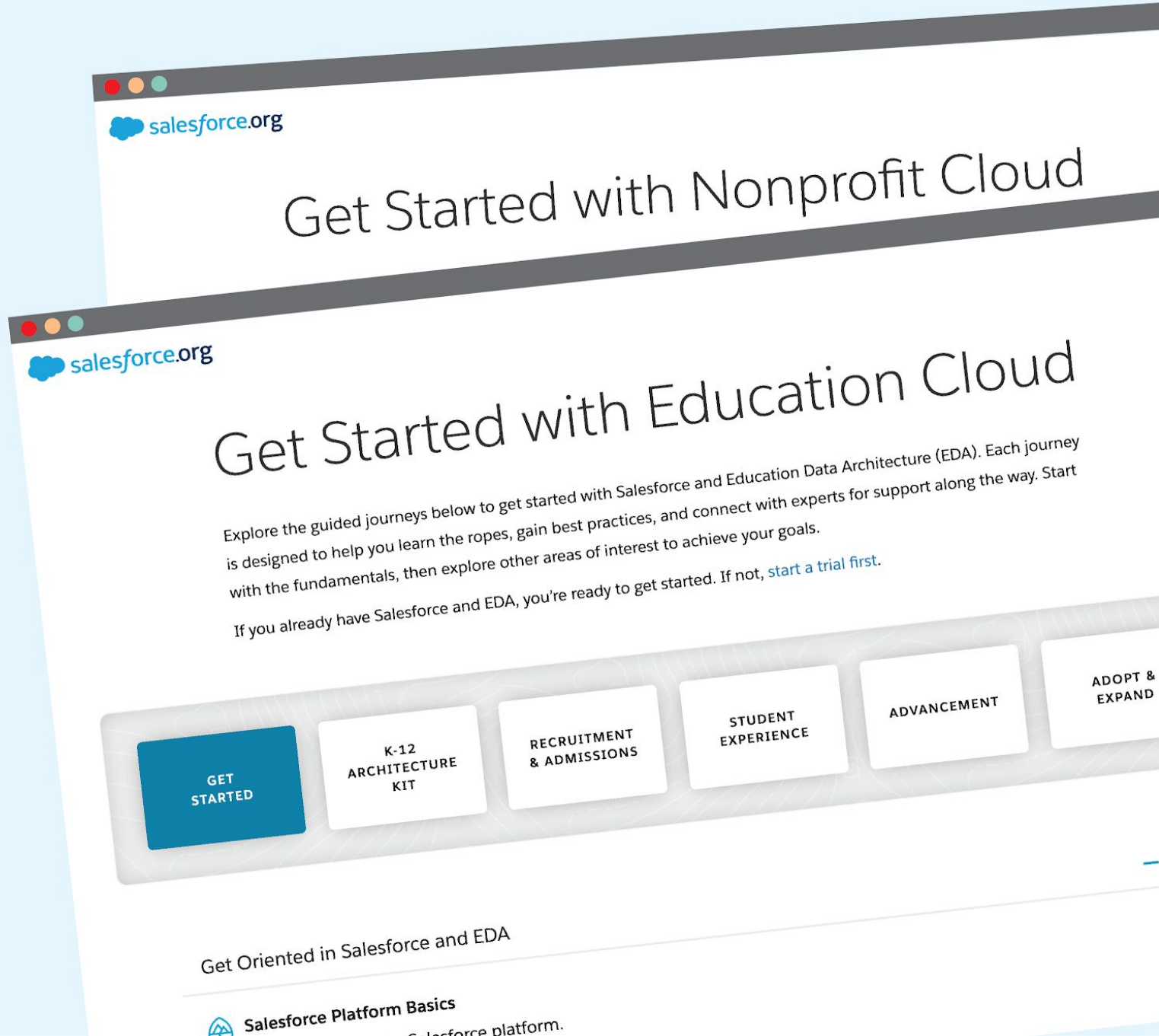
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Thank You