

Key Metrics on the Executive Dashboard

The **Key Metrics** widget on the Executive Dashboard offers a quick view of enrollment and registration information. Each metric links to a detailed report.

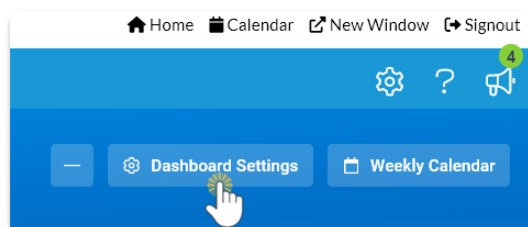
- ★ Identify areas that need attention at a glance.
- ★ Get instant insights into enrollment and registration trends.
- ★ Make informed decisions with detailed linked reports.



Permissions determine what data your Users can access and what actions they can perform. Before proceeding, review [User Permissions for Key Metrics on the Executive Dashboard](#)

Customize Your Key Metrics Widget

To customize Key Metrics, click the **Dashboard Settings** button at the top of the Executive Dashboard.



The Dashboard Settings have three sections related to the Key Metrics: Enrollments, Drops, and Registrations.

Enrollments & Drops




Each of the Enrollment Total, Enrollment Percentage, and Total Drops in the last X days metrics are accompanied by an icon that provides a visual indication of the degree of attention required. The icons are controlled by your defined thresholds, i.e., your tolerance levels.

The icon colors are the same as traffic lights, making the meanings easy to understand and remember:

- Green means the metric is meeting your goal.
 - Yellow is a warning that the metric value is outside the desired range.
 - Red means the metric has reached a problem level and needs attention.
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— Key Metrics

Enrollments & Drops

Enrollments	 195
Enrollment Percentage	 50.65%
Total Drops last 10 days	 5

Use the **Green** and **Yellow** fields to define your thresholds. The icons will change to red based on their relationship to the yellow number (< less than or > greater than).



There are two settings labeled *Total Drops in Last X days*. The first setting specifies the number of days to be measured, and the second setting defines your thresholds for the color-coded icons.

Use the **Total Drops in Last X days** field to define the number of days included in the *Total Drops in Last X days* Key Metric.

Dashboard Settings ×

	Enrollments	Green	Yellow	Red
Enrollments	Enrollments			
Drops	Enrollment Total	100	50	(Enroll Number < Yellow Threshold = Red)
Aged Accounts	Enrollment Percentage	75	50	(Enroll Number < Yellow Threshold = Red)
Birthdays				
Class Registrations	Drops			
	Total Drops in Last X Days	10	Days	
	Total Drops in Last X Days	2	4	(Drops Number > Yellow Threshold = Red)

The number of days entered determines the timeframe for measuring the acceptable number of drops.

For Enrollment Total and Enrollment Percentage:

- A green icon displays if the value is equal to or above the green threshold.
- A yellow icon displays if the value is equal to or above the yellow threshold but below the green threshold.
- A red icon displays if the value is below the yellow threshold.

For Total Drops in Last X days:

- A green icon displays if the value is equal to or below the green threshold.
- A yellow icon displays if the value is above the green threshold but below the yellow threshold.
- A red icon displays if the value is equal to or above the yellow threshold.

Registrations

Use the **Last X Days** field to define the number of days to include in the Portal Enrollments last X days,

Online Registrations, and Class Registrations to be Processed Key Metrics.

Use the **Display Registration Type**, **Display Registration Status**, and **Display Registration Source** checkboxes to choose what registration types, statuses, and sources should be included in the Portal Enrollments last X days, Online Registrations, and Class Registrations to be Processed Key Metrics.

Widget Wisdom - Understand and Interact

The Key Metric widget offers various interactive components. Some provide a deeper dive into your data, while others enable customization of your Executive Dashboard display.

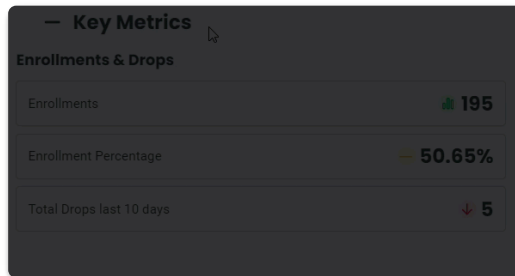
- Click on any metric to open the corresponding report; for example, click on **Active Families of ##** to open the List Active Families report or select the **Class Registrations to be processed** metric to open the Process Class Registrations report.



The choices you make in the Dashboard Settings filter the reports you access through the Executive Dashboard. For example, if you set the *Total Drops in the Last X days* to 10, clicking on

the Total Drops last 10 days metric will show a report reflecting drops from the last 10 days.

- Hover over the **Enrollments** metric to reveal two links:
 - View Enrollments opens the Enrollment Snapshot 1 report.
 - View Category 1 Chart opens a chart showing Category 1 enrollments.



- Collapse or expand the widget using the \ominus or \oplus next to Key Metrics.
 - Use the **Move Widget** icon to drag and drop the widget anywhere on your Executive Dashboard to customize your view. Your chosen layout will be retained each time you visit.
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