iClassPro

Getting Started
with Your Power BI Starter Template

This **Getting Started Guide** will walk you step-by-step through the Power BI Starter Template provided with your Data Warehouse subscription.

The following pages provide some general definitions, notes, and a brief explanation of each report included in the Starter Template to help you understand the information being displayed and how it is calculated.

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CONGRATULATIONS!

About the Template

iClassPro's ready-to-publish Power BI starter template consists of over 30 pages of reports incorporating tables and charts focusing on the following topics:

- Enrollments
- Student Demographics
- Year-to-Date Progress
- Charges and Payments
- Entry Points
- Exit Points
- Family and Student Participation
- Customer Portal Usage

By referring to the queries provided in the starter template, you can learn more about the database schema and how we are calculating specific metrics. From here, you can add, delete, or edit queries as needed to fit the needs of your business.

Definitions

- "ACTIVE" *(shown in all capital letters)* refers to an enrollment **type**.

- "Active" *(shown in mixed-case or all lower-case letters)* refers to an enrollment **status**.

    - *An "active" enrollment status means that the start date of a specific enrollment must be equal to or prior to the start of a defined date range or specific date, and the enrollment drop date is equal to or PRIOR to the end of a defined date range or specific date.*

- Whenever it is used, the term "Customer Portal" actually refers to any customer self-service option *(both the web-based Customer Portal and Mobile/Branded App).*

- A "slicer" is a "filter" that appears at the top of a report and allows users to amend the criteria used to calculate the results being displayed.

- A "relative slicer" is a slicer where all dates are relative to the current date *(today).* Options for these slicers use a modifying article such as Next/Last/This etc.

- A "data point" is a block on a bar/column, or a single result within any chart.

- A "legend" is a section in a chart that explains the meaning of particular colors, indicators, etc.

Important Notes

- As these reports are based on data retrieved from the Data Warehouse, data as of the "Current Date" could actually be up to 24 hours old depending on when your data was last updated.
- Certain reports have default values for dates/date ranges. If needed, these can be changed by adjusting the date/date range slicer at the top of the report.
  - *If a default value exists, this will be noted in the report description.*
  - *Unless noted otherwise, all reports will default to showing data divided by Site/Location if multiple Locations exist in your account.*
- Whenever multiple options exist *(such as Site/Location,Gender, Program, Level, etc.)*, the report can be limited to a single option by selecting it from the appropriate slicer on the report. Multiple options can be selected by holding down CTRL/COMMAND and clicking on the option(s) to enable/disable them. *(CTRL/COMMAND refers to keys on PC/Mac keyboards, respectively.)*
  - *NOTE: For the purposes of analyzing data/performing calculations, selecting ALL options or selecting NO options will be treated in the same manner.*
- If a vertical line appears on a chart or graph, this indicates the average value across all Sites/Locations to be used for comparison.
- When hovering over charts or graphs, a toolbar may be displayed in the upper right-hand corner offering additional filter options.

- To be included in "Exit" results *("Exit Age", "Exit Level", "Exit Program")*, a student must have no activity within the past 90 days *(i.e., their most recent drop date must be at least 90 days prior to the current date).*
  - *This same criteria applies when considering a "Dropped" enrollment.*

Enrollment Charts / Enrollments (Active & Waitlist)

Enrollments (Active & Waitlist)

Date ⌄

Last ⌄ 24 Weeks ⌄

📅 10/14/2022 - 3/30/2023

Location A

Location B

Location C

Location D

Location E

Location F

● ACTIVE ● WAIT

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What is it?

This report displays the number of ACTIVE and WAIT type class enrollments that were active within the selected date range.

- *NOTE: This date range defaults to the past 24 weeks.*

How will it help me?

This graph allows you to see at a glance how your ACTIVE and WAIT type enrollments were trending on any given date within the specified date range (by hovering over a selected date), as well as a general view of how these enrollment numbers were trending over the entire date range.

Current Enrollments
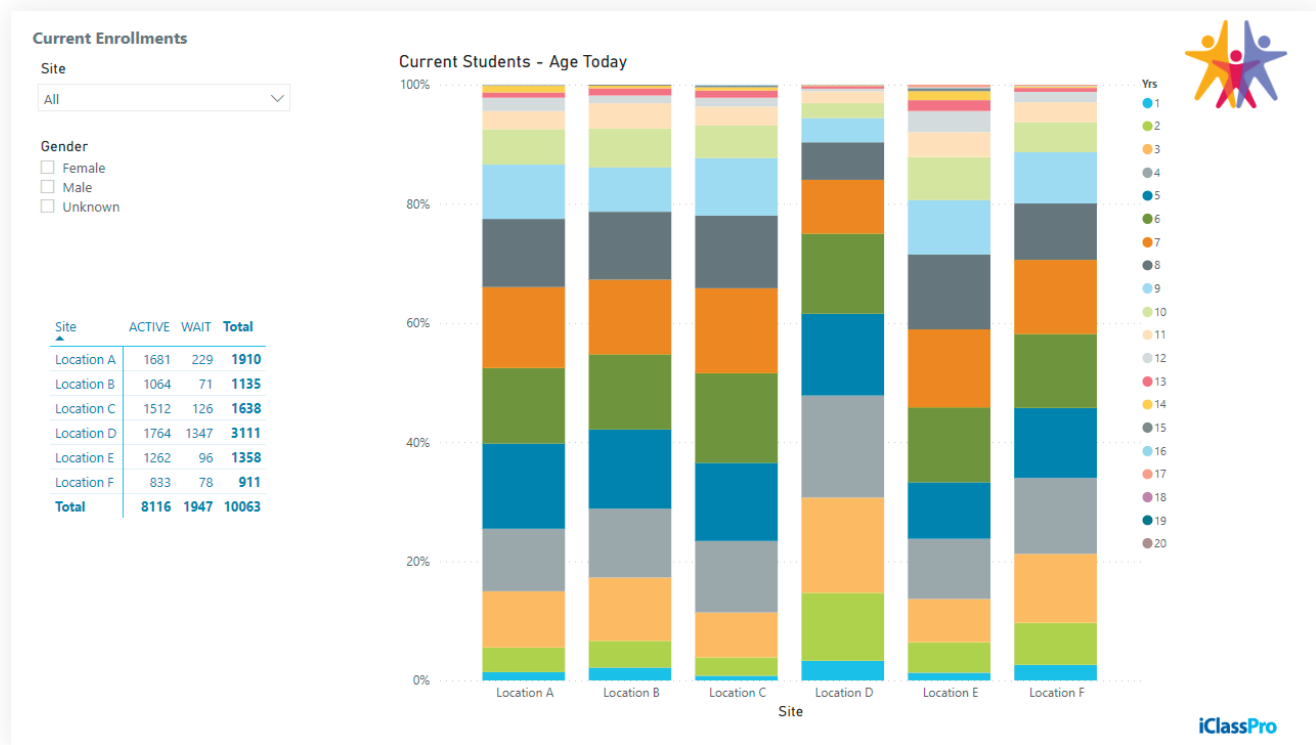
What is it?

This report displays the number of ACTIVE and WAIT type class enrollments that are active as of the current date.

How will it help me?

This report allows you to see at a glance what your ACTIVE and WAIT typeclass enrollment numbers are on the current date, as well as adjusting the display of these enrollment numbers to show more age or Site/Location-specific information.
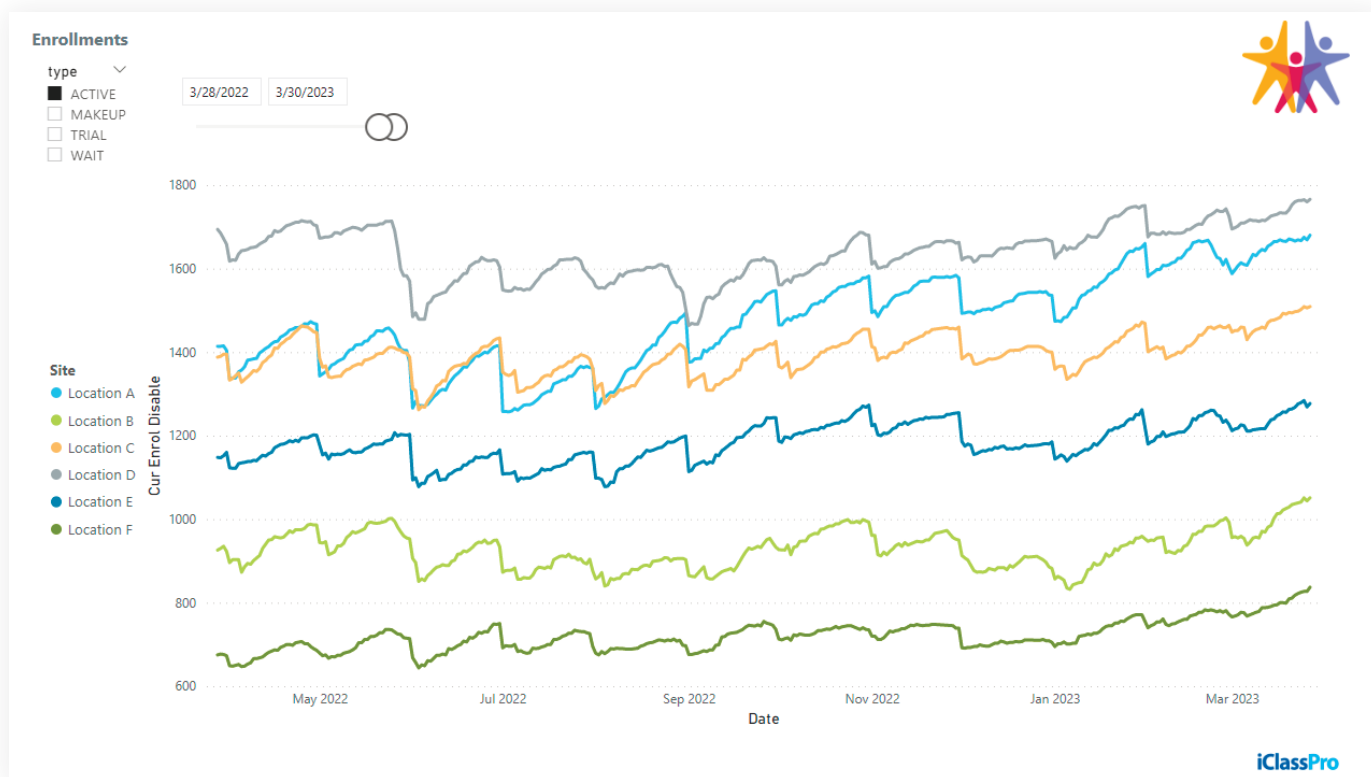
Daily Enrollment Count

What is it?

This report displays the number of class enrollments that were active within the selected date range. By default, the report only includes ACTIVE enrollments and are broken down by Site/Location.

How will it help me?

This report allows you to see at a glance how your enrollments were trending on any given date within the specified date range, as well as a general view of how these enrollment numbers were trending over the entire date range.

New Enrollments

New Enrollments

Date Created
1/1/2022   10/12/2022

Enrollment Type, Site
ACTIVE

91.91%

● Customer Portal ● Office Portal

Site Name	New Families	New Students
Location D	1680	2155
Location C	1585	1933
Location A	1528	1953
Location B	1297	1576
Location E	1285	1604
Location F	877	1129
Total	8252	10350

● Location A ● Location B ● Location C ● Location D ● Location E ● Location F

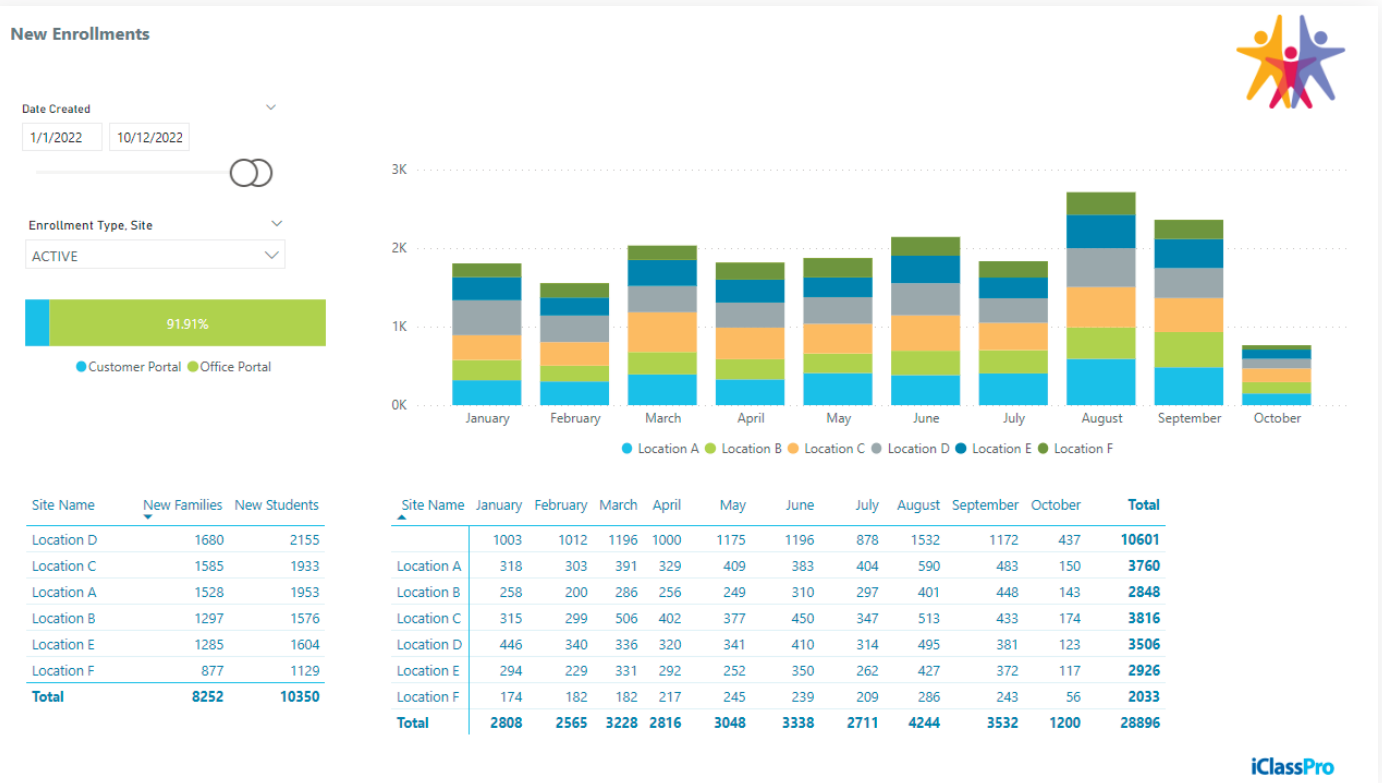| Site Name	January	February	March	April	May	June	July	August	September	October	Total
	1003	1012	1196	1000	1175	1196	878	1532	1172	437	10601
Location A	318	303	391	329	409	383	404	590	483	150	3760
Location B	258	200	286	256	249	310	297	401	448	143	2848
Location C	315	299	506	402	377	450	347	513	433	174	3816
Location D	446	340	336	320	341	410	314	495	381	123	3506
Location E	294	229	331	292	252	350	262	427	372	117	2926
Location F	174	182	182	217	245	239	209	286	243	56	2033
Total	2808	2565	3228	2816	3048	3338	2711	4244	3532	1200	28896

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What is it?

This report displays the number of new class enrollments that were created within the selected date range, as well as totals for new family and student accounts created within the same date range. By default, the report only includes ACTIVE enrollments.

How will it help me?

This report allows you to see at a glance how many new families, students, or enrollments were created during any given month within the specified date range, as well as a general view of how these numbers were trending over the entire date range.

Drops & Transfers
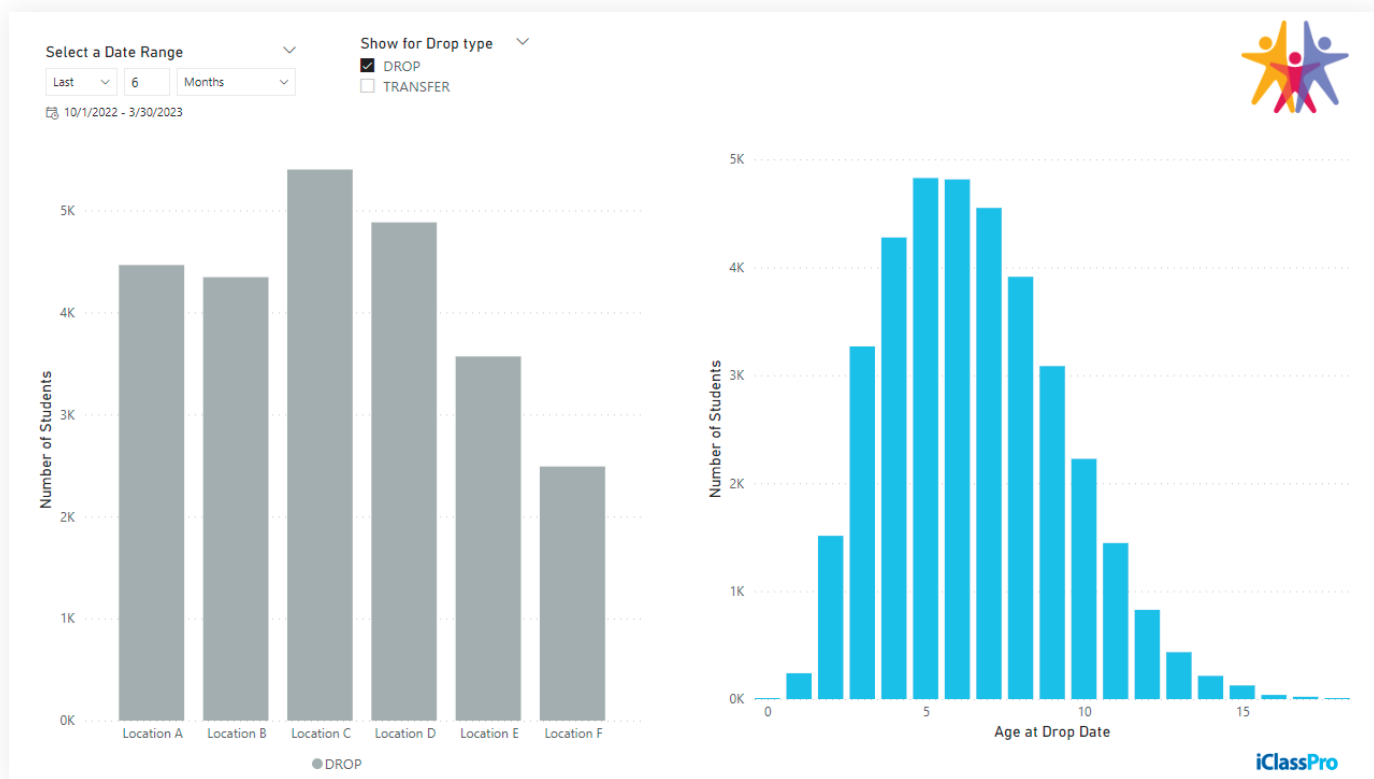
What is it?

This report displays the number of new class enrollments that were created within the selected date range, as well as totals for new family and student accounts created within the same date range. By default, the report only includes ACTIVE enrollments.

How will it help me?

This report allows you to see at a glance how many new families, students, orenroll-ments were created during any given month within the specified date range, as well as a general view of how these numbers were trending over the entire date range.

Successful Conversions

Conversion Rate From Trial to Active

Year

2022

Conversion Rate

Site	Trials	Active	Success	
Location A	1339	1061	79.24%	★
Location B	1300	976	75.08%	★
Location C	1183	882	74.56%	★
Location D	59	36	61.02%	☆
Location E	1058	794	75.05%	★
Location F	754	582	77.19%	★
Total	**5693**	**4331**	**76.08%**	

Show Data   Hide Data

Conversion Rate Vs Loss Rate by Site

● Success ● Loss

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What is it?

This report displays the conversion rate by Site/Location within a specified year. This metric is based on the number of students who have records in the database for both a TRIAL type enrollment and ACTIVE type enrollment.

How will it help me?

This report allows you to see at a glance how your conversion rates compare across multiple Sites/Locations, as well as drilling down to specific information about the students to show enrollments were used in the calculations.

Total Charges & Payments (Payments and Charges)
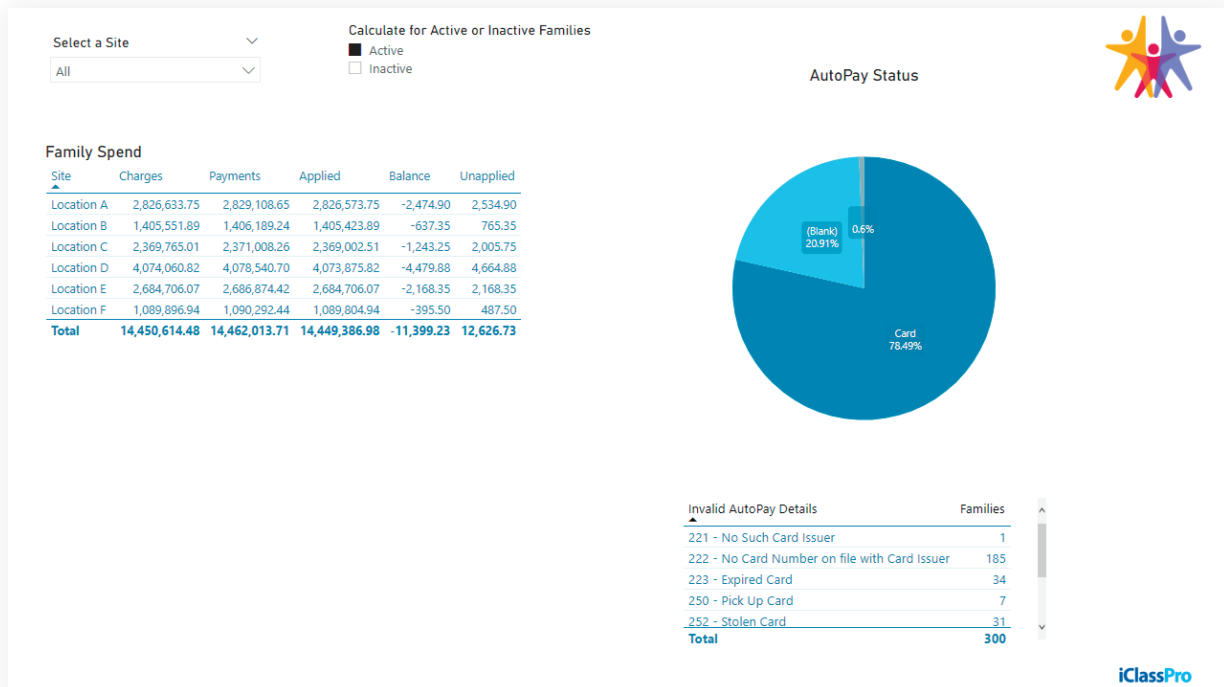
What is it?

This report displays tables and charts showing the total amount of charges created, payments taken, payments applied, outstanding balances, unapplied payments/credit, and information about families with invalid Autopay details stored on file. It also reflects the AutoPay status of families, divided by the Payment Method.

How will it help me?

This report allows you to see at a glance what your financial data looks like for a specific Site/Location as of the current date. It also allows you to see how many of your customers have stored payment information on file and which Payment Methods are being utilized the most.

Monthly Revenue

Selected Year or Monthly Charges

Select a Year, Quarter, Month, or Day ⌄

2022 ⌄

Site	January	February	March	April	May	June	July	August	September	October	November	December	Total
Location A	140,583	149,300	179,563	169,578	173,092	186,006	192,592	180,474	175,670	179,693	179,238	184,102	**2,089,890**
Location B	84,787	85,422	111,125	109,503	112,489	117,856	123,276	107,777	109,006	109,408	102,966	99,450	**1,273,064**
Location C	132,702	141,289	160,802	158,711	162,002	180,002	173,112	162,261	157,982	172,375	161,493	157,967	**1,920,697**
Location D	215,974	208,475	267,296	279,594	278,223	298,915	265,970	220,085	237,513	245,903	251,080	252,809	**3,021,837**
Location E	140,403	131,555	156,377	152,649	137,208	158,076	167,123	149,906	144,796	156,416	145,559	148,883	**1,788,952**
Location F	68,784	71,018	84,412	78,743	88,303	107,296	106,767	87,381	85,912	86,360	79,683	90,670	**1,035,328**
Total	**783,234**	**787,059**	**959,576**	**948,779**	**951,316**	**1,048,152**	**1,028,839**	**907,883**	**910,878**	**950,154**	**920,018**	**933,881**	**11,129,769**

| Site	Taxes
Location A	951.33
Location B	457.77
Location C	716.72
Location D	860.73
Location E	589.43
Location F	316.88
Total	**3,892.86**
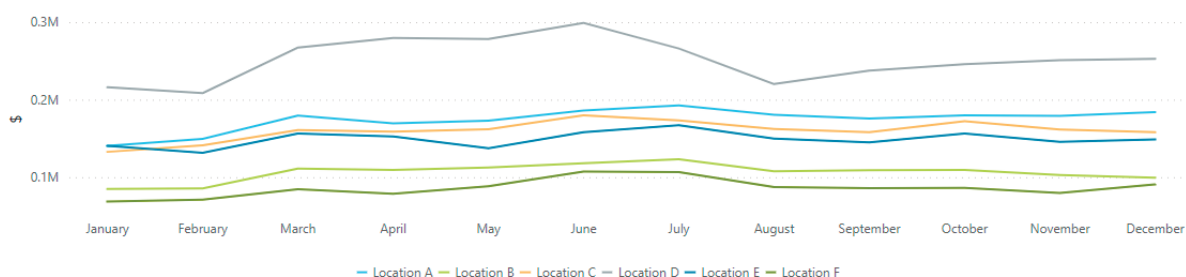
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What is it?

This report displays tables and graphs related to the total **amount** of charges created during a specified period of time, as well as information regarding the amount of sales tax charged.

How will it help me?

This report allows you to see at a glance how the amount of created charges was trending for a specific Site/Location for a selected year, quarter, month, or day.

Annual Performance (Annual Revenue - Growth)
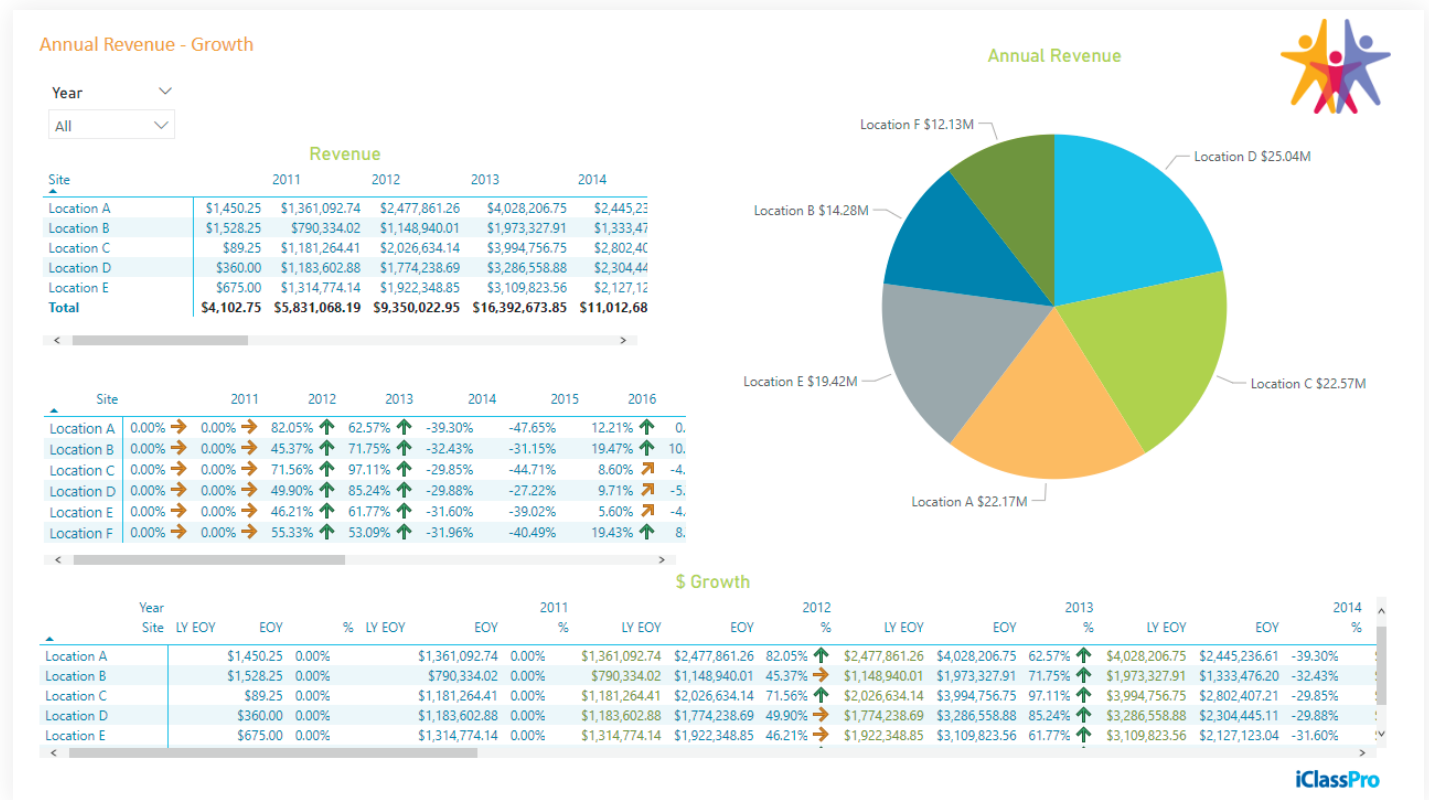
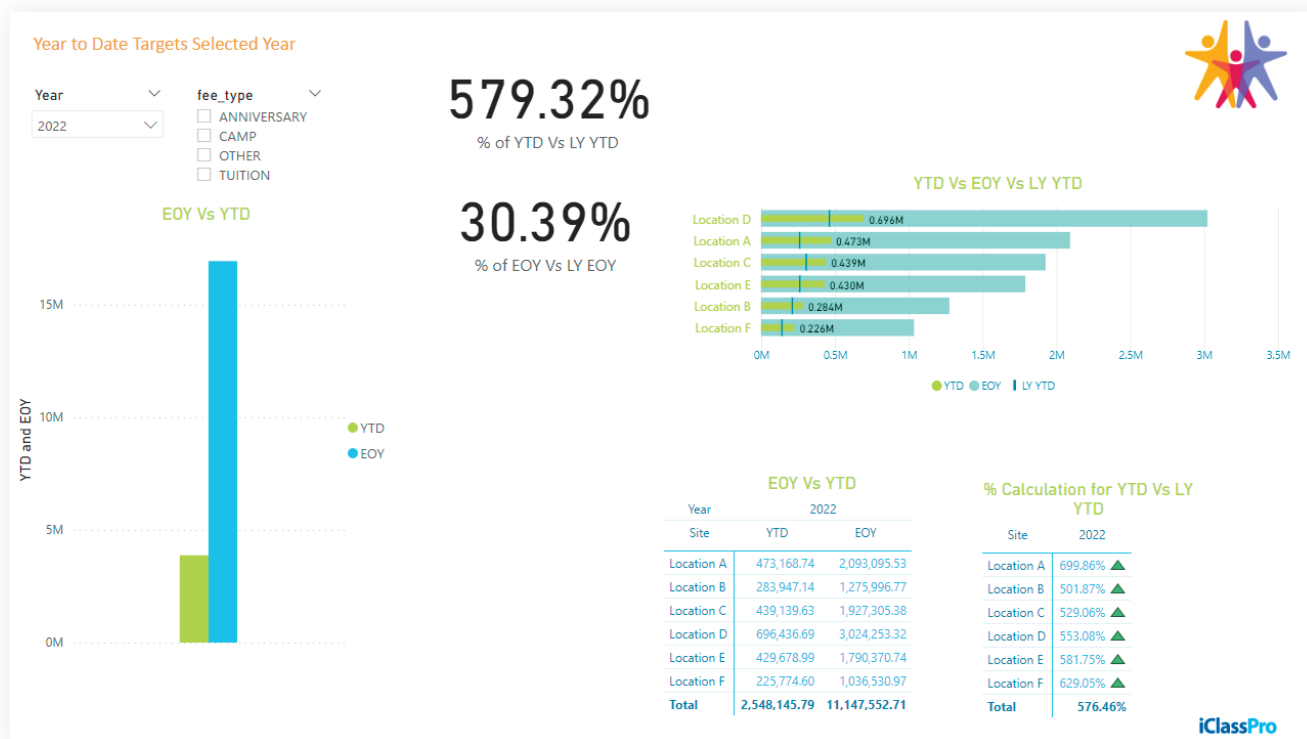

What is it?

This report displays tables and graphs related to the total **amount** of charges created during a particular year/years, as well as how those amounts compare with the same data for the previous year to reflect financial growth/trends.

How will it help me?

This report allows you to see at a glance how the amount of created charges was trending for one or more selected years.

YTD Progress (Year to Date Targets)

What is it?

This report displays tables and graphs comparing the total **amount** of charges created as of the end of current year/current year-to-date and how these totals compare to the same timeframe for one or more other selected years to reflect financial growth/trends and establish targets.

How will it help me?

This report allows you to see at a glance how the amount of charges created as of the end of current year/current year-to-date compares to the same timeframe for one or more other selected years using benchmarks and other data indicators.

# Annual Revenue (Date Range Annual Charges)
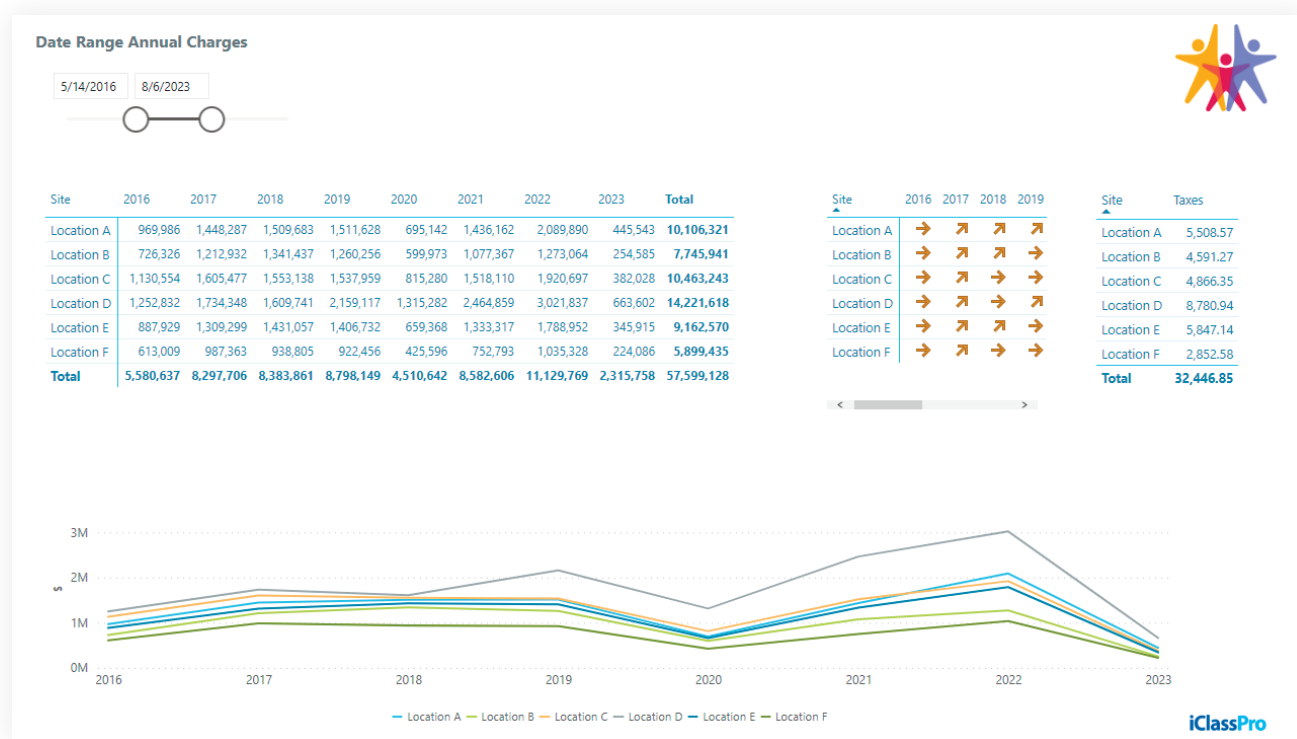
What is it?

This report displays tables and graphs related to the total **amount** of charges created for each year in the selected date range, as well as how those amounts compare with the same data for the previous year to reflect financial growth/trends. It also includes a separate table reflecting the total amount of tax line items for each year in the selected date range.

How will it help me?

This report allows you to see at a glance what your financial data looks like for a specific Site/Location for a selected year within the defined date range. It also allows you to see how these numbers are trending when compared to the previous year.

NOTE: Whenever it is used, the term "Customer Portal" actually refers to any customer self-service option (such as the web-based Customer Portal/Mobile App/Branded App).

Use of the Portal
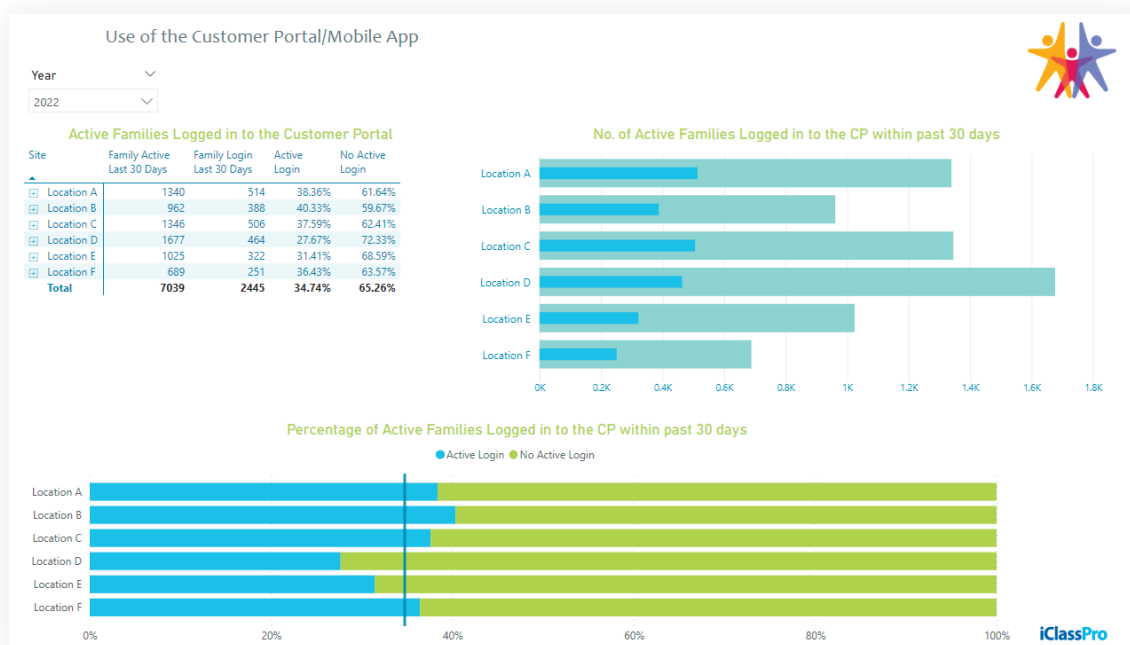
What is it?

This report displays tables and graphs related to the number of Active families who have logged into the Customer Portal within the past 30 days *(calculated from the current date).*

How will it help me?

This report allows you to see at a glance how many families with an enrollment that was active within the past 30 days are interacting with the Customer Portal within the same time period.

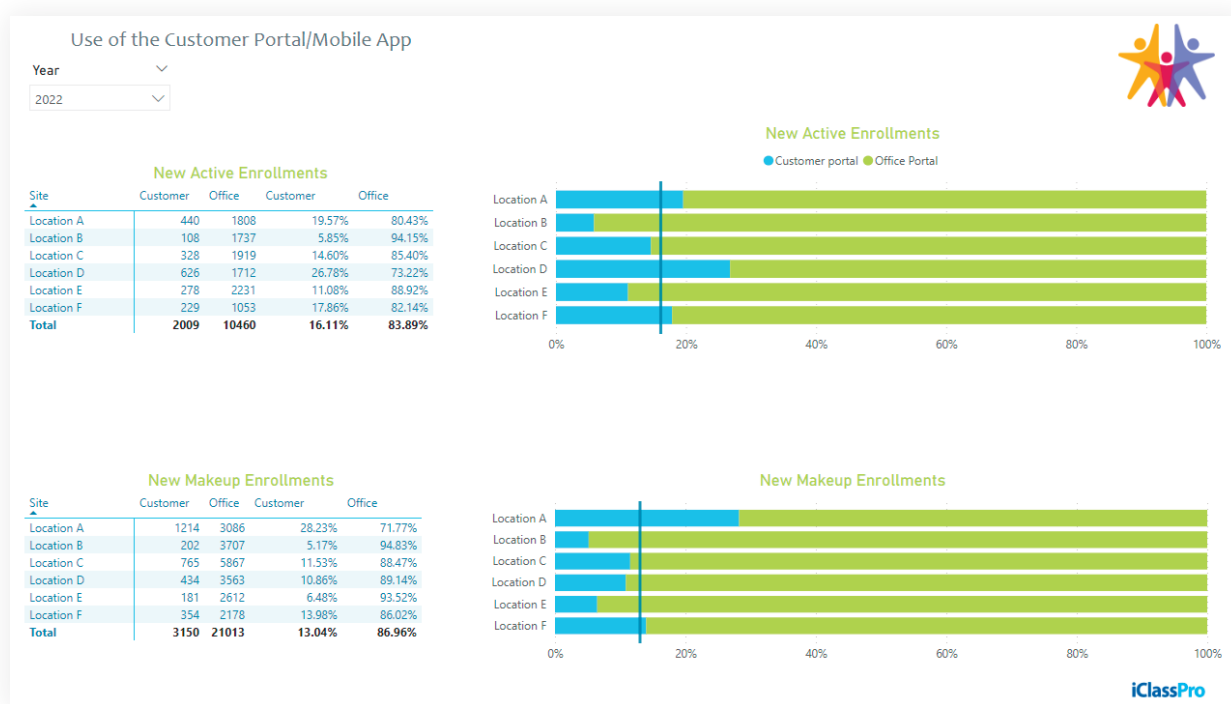# Enrollment Requests (CP New Enrollments)
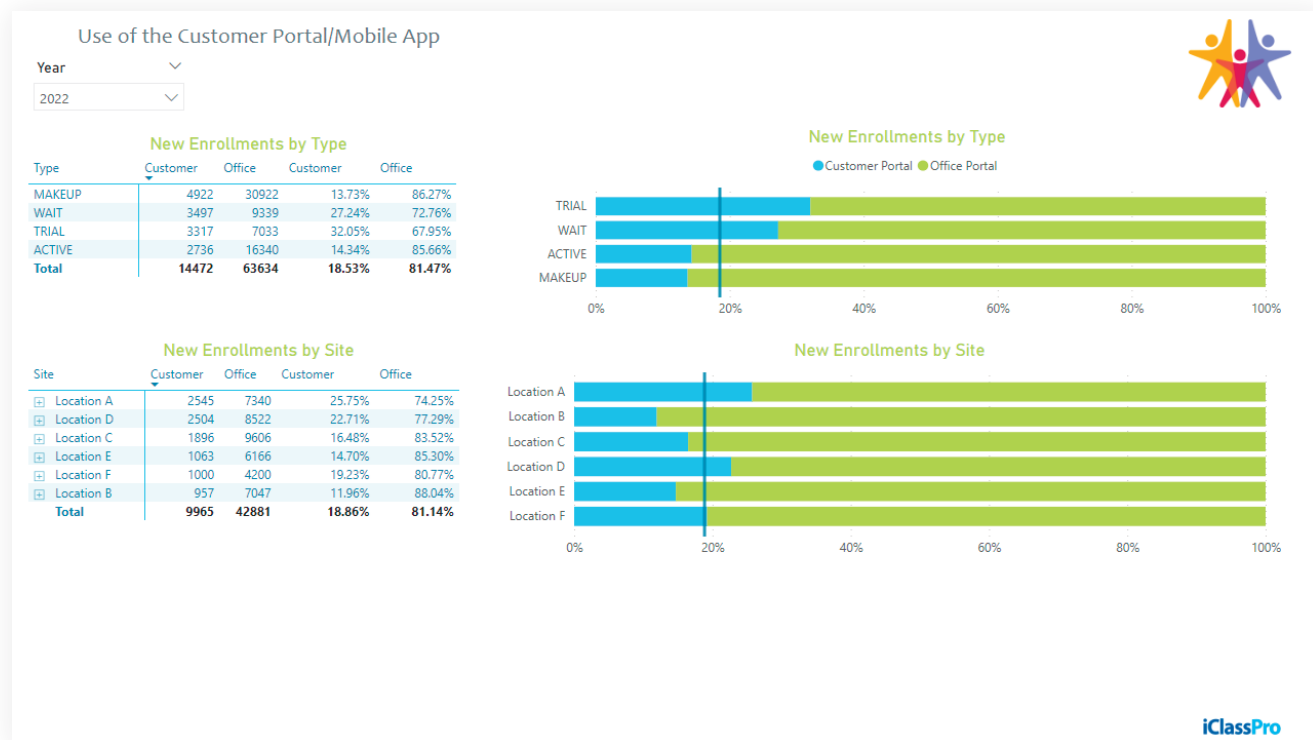
What is it?

This report displays tables and graphs related to the number of new enrollments submitted/created via the Customer Portal and Office Portal within the selected year(s). Results are given based on both the Enrollment Type and by Site/Location.

How will it help me?

This report allows you to see at a glance the number of new enrollments of each type that were created via either the Customer Portal or Office Portal within the selected year(s) at the selected Site(s)/Location(s).
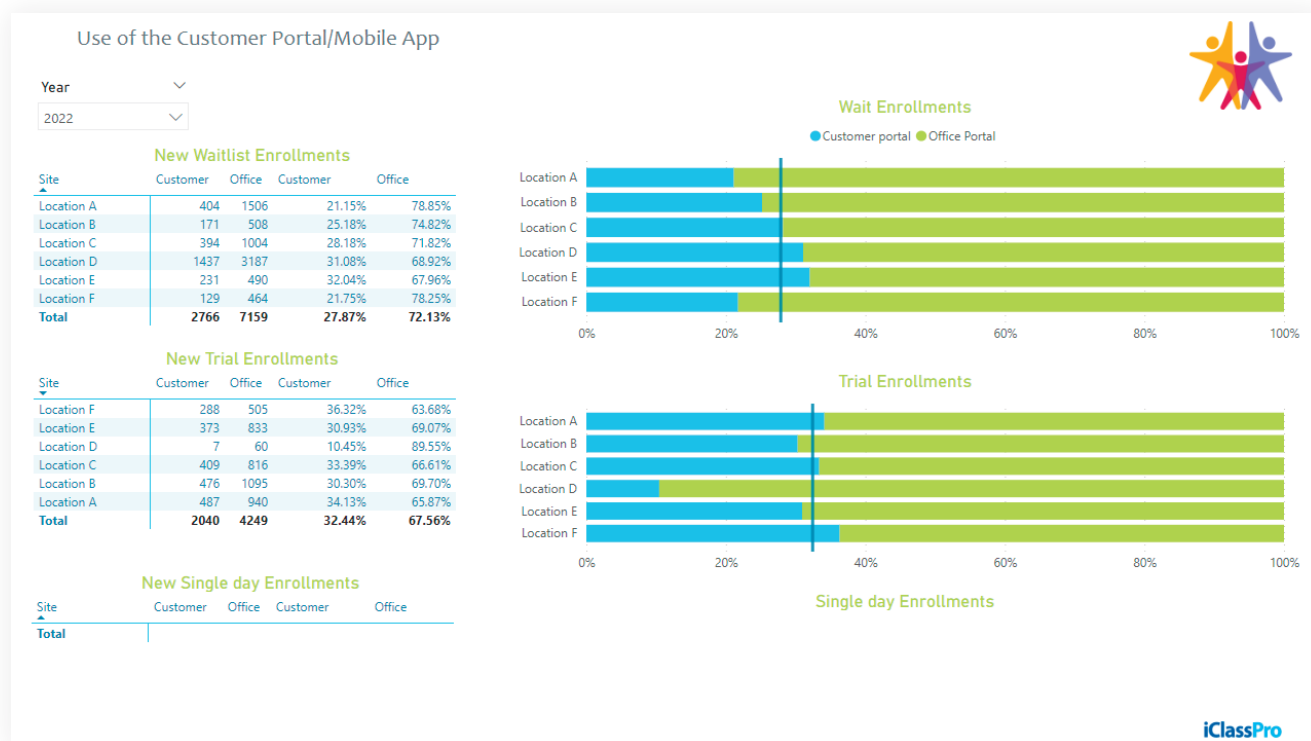
Active/Makeup Enrollments

What is it?

This report displays tables and graphs related to the number of new ACTIVE or MAKEUP type enrollments submitted/created via the Customer Portal and Office Portal within the selected year(s).

How will it help me?

This report allows you to see at a glance the number of ACTIVE and MAKEUP type enrollments that were created via either the Customer Portal or Office Portal within the selected year(s) at the selected Site(s)/Location(s).

Wait/Trial/Single Day Enrollments

What is it?

This report displays tables and graphs related to the number of new WAIT, TRIAL, or SINGLE DAY type enrollments submitted/created via the Customer Portal and Office Portal within the selected year(s).

How will it help me?

This report allows you to see at a glance the number of WAIT, TRIAL, or SINGLE DAY type enrollments that were created via either the Customer Portal or Office Portal within the selected year(s) at the selected Site(s)/Location(s).
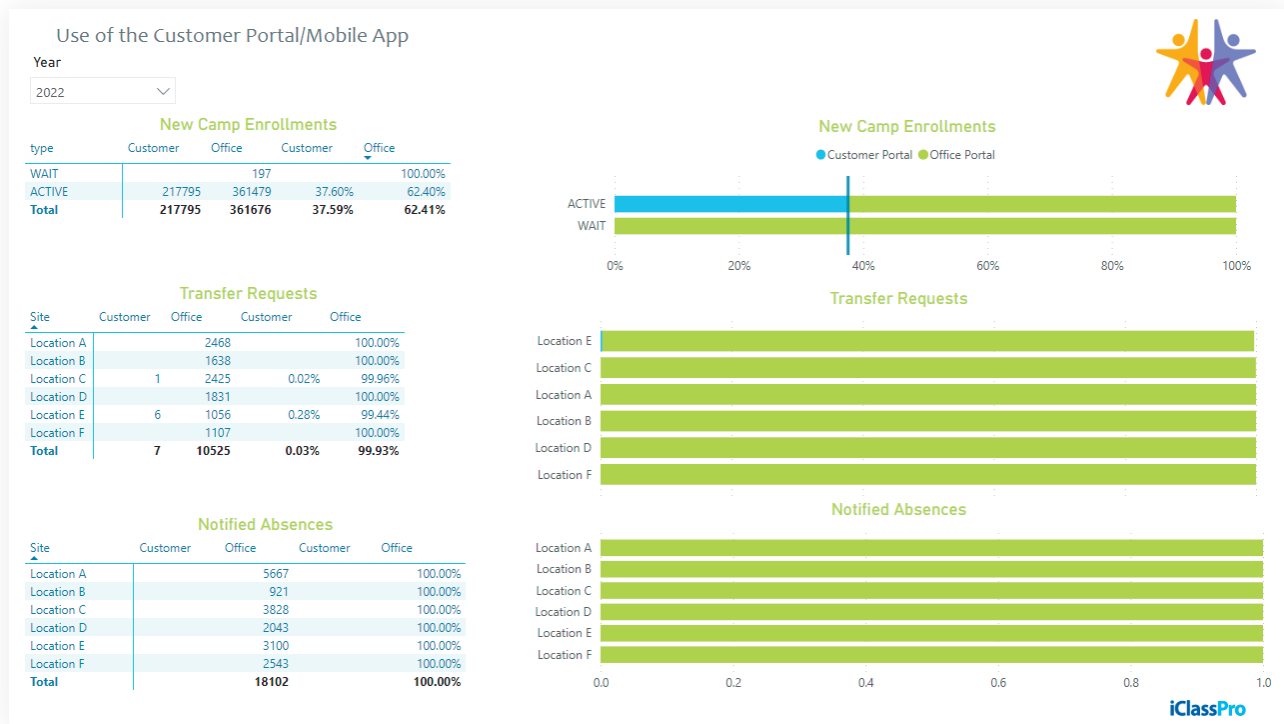
Camp Requests/Transfer Requests/Notified Absences

What is it?

This report displays tables and graphs related to the number of new ACTIVE and WAIT type Camp Enrollments, Class Enrollment Transfer Requests, and/or Future Absence requests submitted/created via the Customer Portal and Office Portal within the selected year(s).

How will it help me?

This report allows you to see at a glance the number of new ACTIVE and WAIT type Camp Enrollments, Class Enrollment Transfer Requests, and/or Future Absence requests submitted/created via the Customer Portal and Office Portal within the selected year(s).

Charges & Payments

Use of the Customer Portal/Mobile App

Year
2022

No. of Charges Raised

Site	Customer	Office	Customer	Office
Location A	2808	22723	11.00%	89.00%
Location B	1691	16635	9.23%	90.77%
Location C	1647	22573	6.80%	93.20%
Location D	6177	26513	18.90%	81.10%
Location E	1912	18658	9.30%	90.70%
Location F	2207	12027	15.51%	84.49%
Total	16442	119129	12.13%	87.87%

No. of Payments Processed

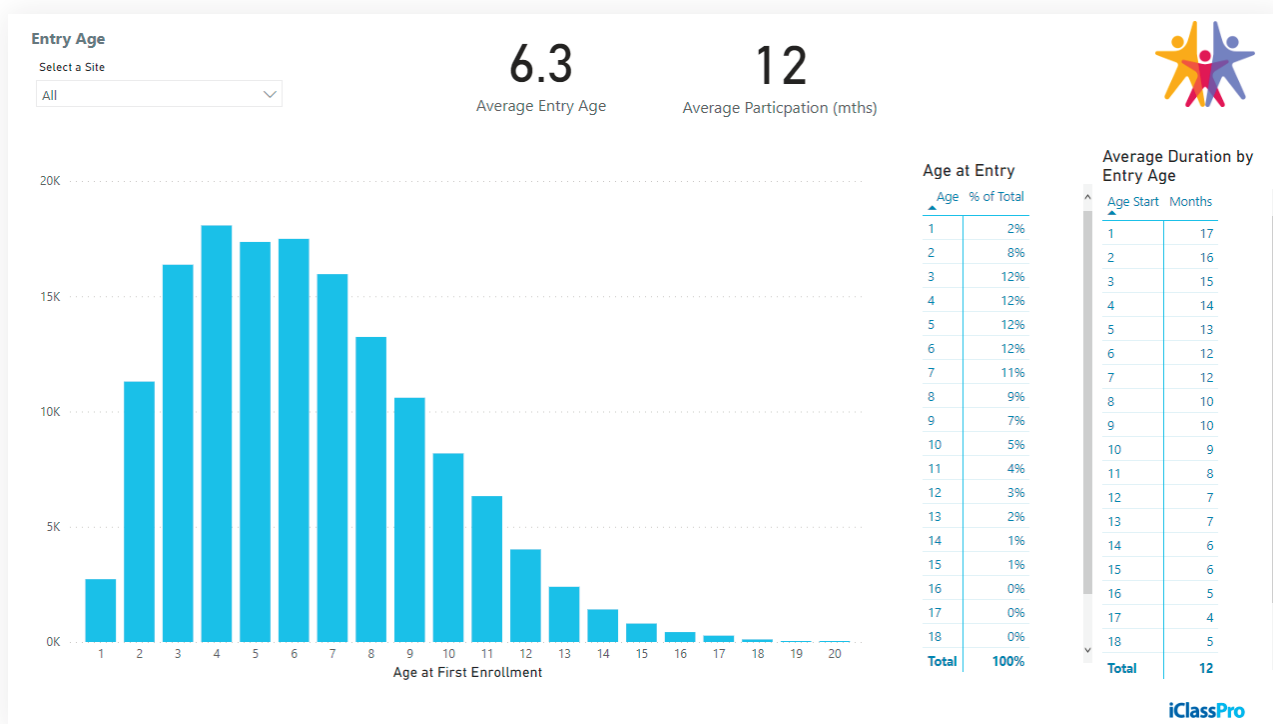| Site	Customer	Office	Customer	Office
Location A	14993	178184	7.76%	92.24%
Location B	13590	144156	8.62%	91.38%
Location C	18334	194459	8.62%	91.38%
Location D	34559	191015	15.32%	84.68%
Location E	16684	158410	9.53%	90.47%
Location F	14710	115917	11.26%	88.74%
Total	112870	982141	10.31%	89.69%

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What is it?

This report displays tables and graphs related to the number of new charges and payments submitted/created via the Customer Portal and Office Portal within the selected year(s).

- *Please note that this is a COUNT of the number of charges/payments created; not the value/amount of those charges/payments.*

How will it help me?

This report allows you to see at a glance the number of new charges and payments that were created via either the Customer Portal or Office Portal within the selected year(s) at the selected Location(s).

Entry Age

Entry Age
Select a Site
All

6.3
Average Entry Age

12
Average Particpation (mths)

Age at Entry	
Age	% of Total
1	2%
2	8%
3	12%
4	12%
5	12%
6	12%
7	11%
8	9%
9	7%
10	5%
11	4%
12	3%
13	2%
14	1%
15	1%
16	0%
17	0%
18	0%
Total	**100%**

| Average Duration by Entry Age	
Age Start	Months
1	17
2	16
3	15
4	14
5	13
6	12
7	12
8	10
9	10
10	9
11	8
12	7
13	7
14	6
15	6
16	5
17	4
18	5
Total	**12**

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What is it?

This report displays tables and graphs related to the average age at which a student begins their first enrollment and the average length of participation between the start date of their first enrollment through the drop date of their last enrollment.

- *NOTE: If the student has an active enrollment without an assigned drop date, the total of active months enrolled is calculated based on the start date of their first enrollment through the current date.*

How will it help me?

This report allows you to see at a glance the average Entry Age and duration of enrollment in months for students enrolled at selected Location(s).

Entry Level
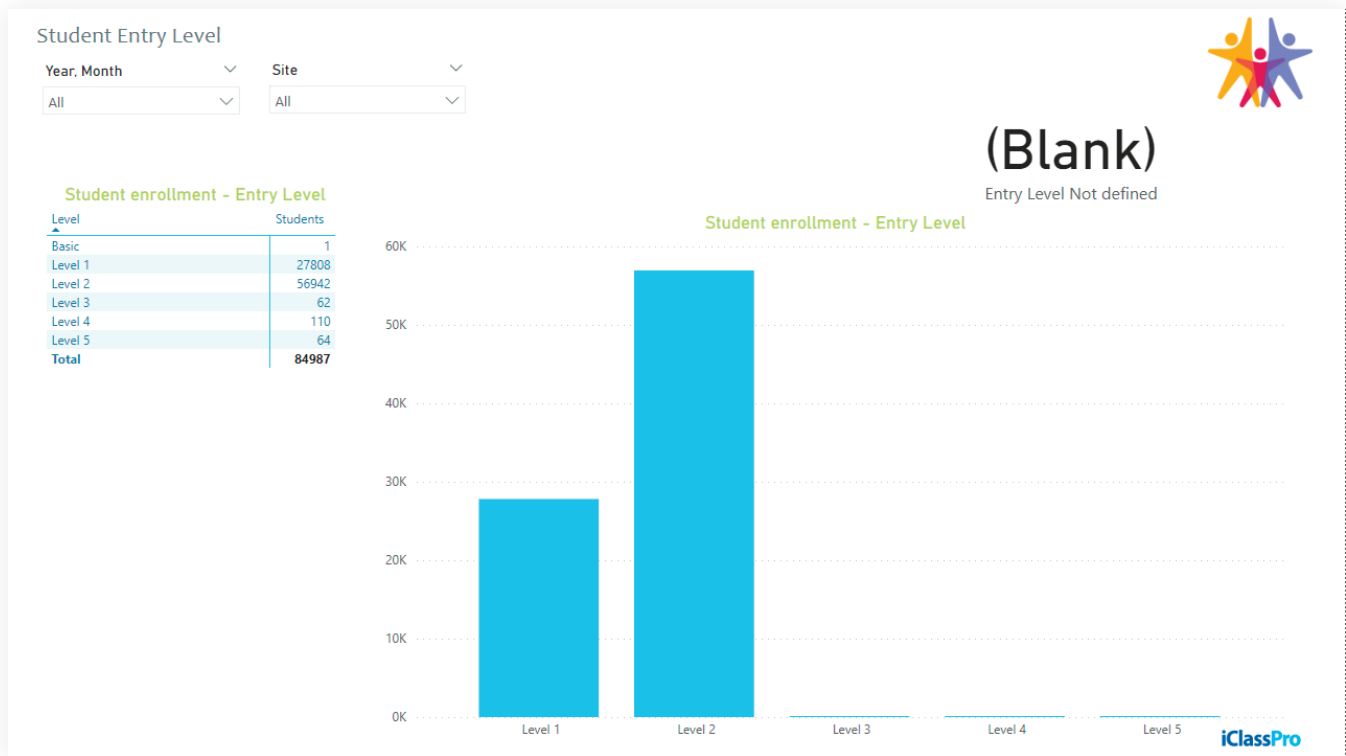
What is it?

This report displays tables and graphs related to the number of students whose first enrollment is in a class associated with a specific Class Level. *(NOTE: Students whose first enrollment was in a class without a Class Level attached will be reflected in their own section of the report. If no students have first enrollments that meet these criteria, the word "(Blank)" will be displayed.)*

How will it help me?

This report allows you to see at a glance which Class Level(s) are the most common point of entry for students at your Site(s)/Location(s) for any selected year/month.
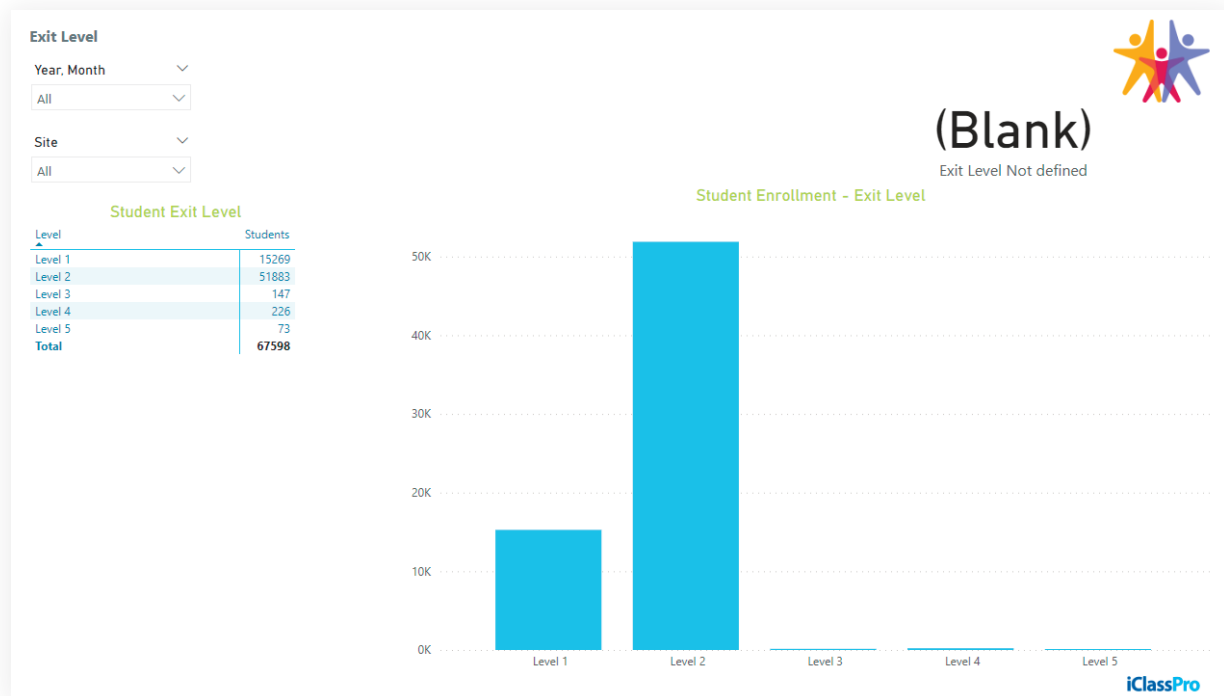
Exit Age
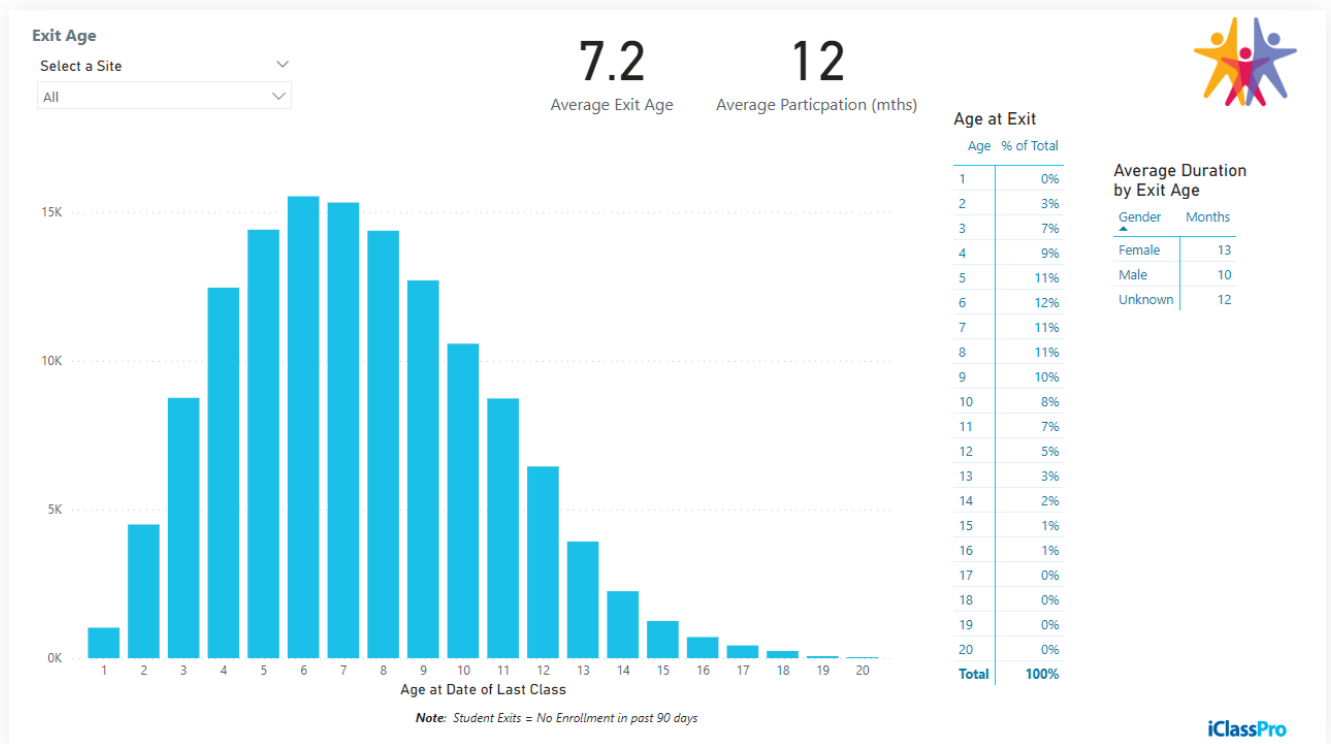
What is it?

This report displays tables and graphs related to the average age at which a student drops from their last enrollment and the average length of participation between the start date of their first enrollment through the drop date of their last enrollment.

- *NOTE: This report does not include enrollments that are ongoing as of the current date. To be included in the "Exit Age" results, a student must have no activity within the past 90 days.*

How will it help me?

This report allows you to see at a glance the average Exit Age and duration of enrollment in months for students enrolled at at selected Location(s).

Exit Level

What is it?

This report displays tables and graphs related to the number of students whose last enrollment is in a class associated with a specific Class Level. *(NOTE: Students whose last enrollment was in a class without a Class Level attached will be reflected in their own section of the report. If no students have last enrollments that meet these criteria, the word "(Blank)" will be displayed.)*
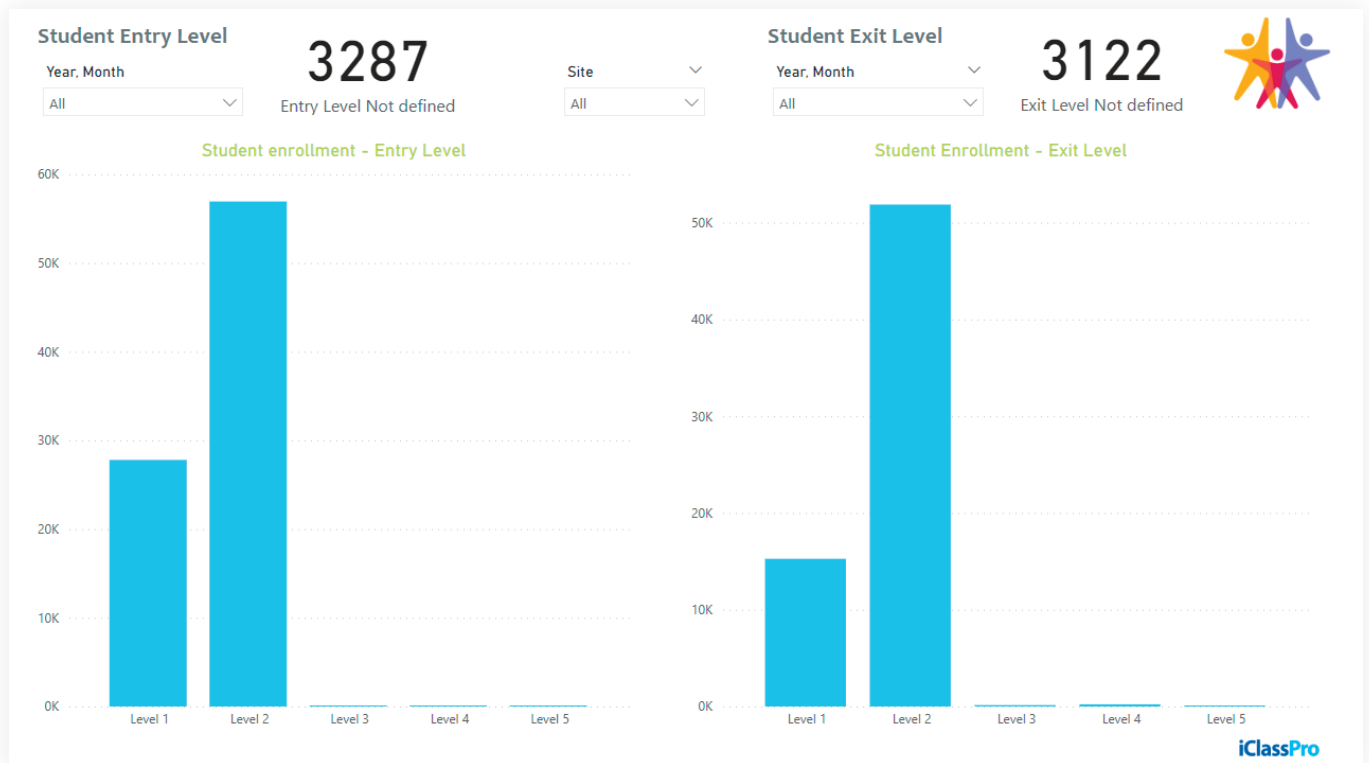
- *NOTE: This report does not include enrollments that are ongoing as of the current date. To be included in the "Exit Level" results, a student must have no activity within the past 90 days.*

How will it help me?

This report allows you to see at a glance which Class Level(s) are the most common point of exit for students at your Site(s)/Location(s) for any selected year/month.
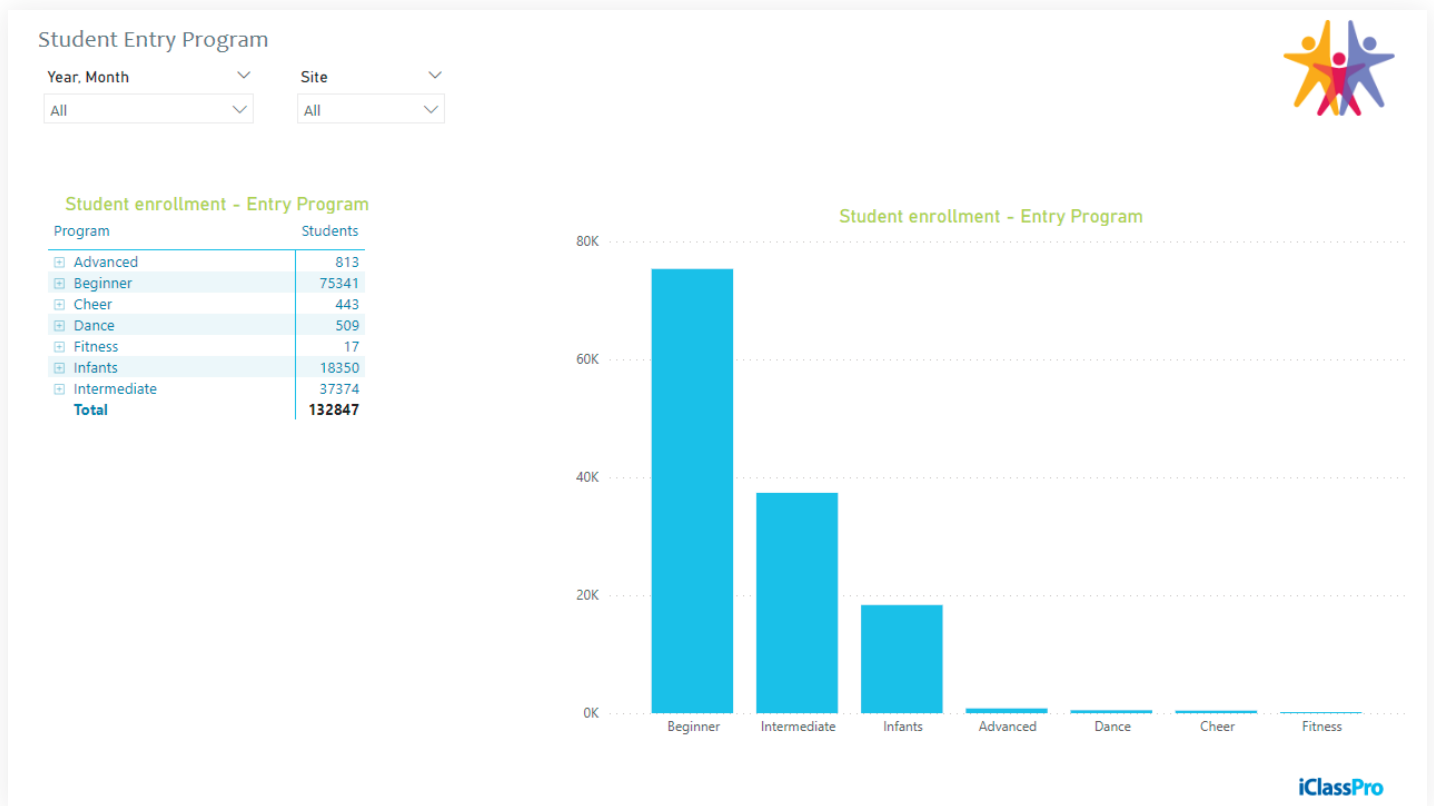
Combined Entry/Exit Level

What is it?

This report displays tables and graphs related to which Class Level(s) are the most common point of entry/exit for students at your Site(s)/Location(s) for any selected year/month. (NOTE: Students whose first or last enrollment was in a class without a Class Level attached will be reflected in their own section(s) of the report. If no students have last enrollments that meet these criteria, the word "(Blank)" will be displayed.)

- NOTE: This report does not include "Exit Level" results for enrollments that are ongoing as of the current date. To be included in the "Exit Level" results, a student must have no activity within the past 90 days.

How will it help me?

This report allows you to see at a glance which Class Level(s) are the most common point of entry and/or exit for students at your Site(s)/Location(s) for any selected year/month.
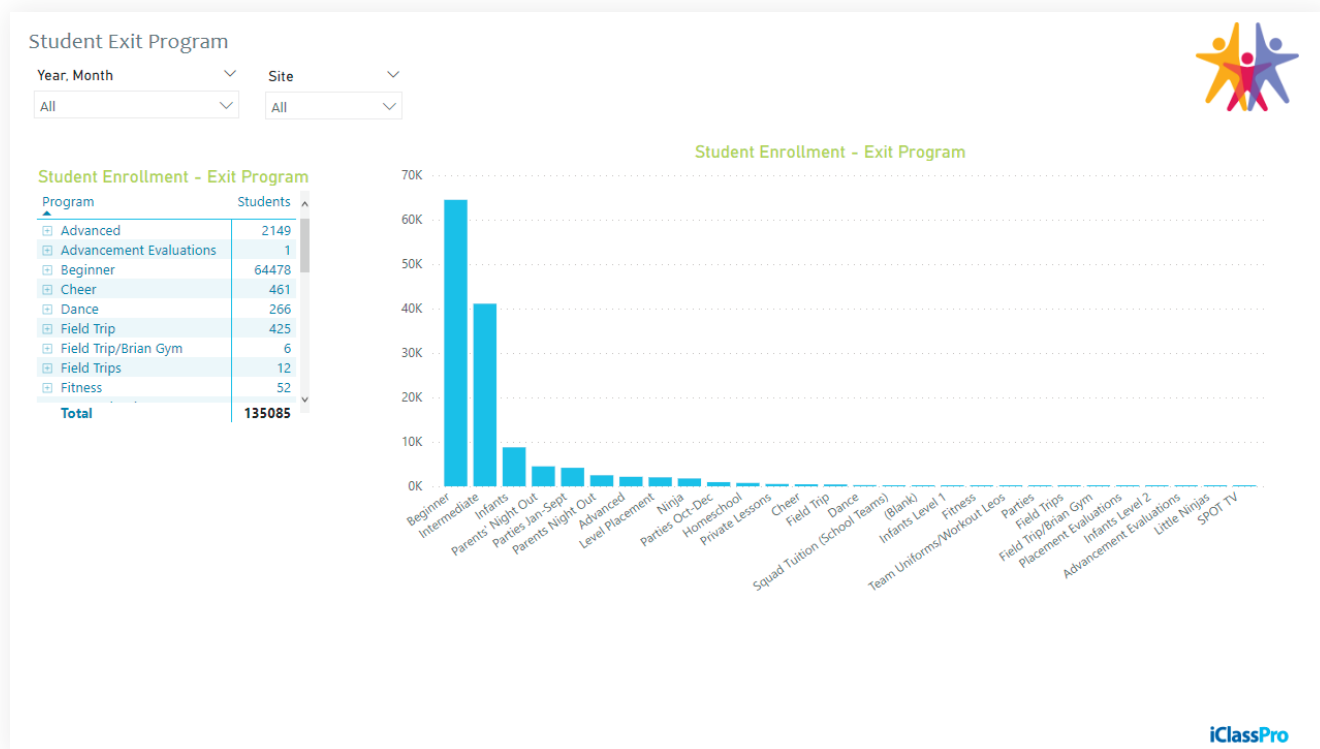
Entry Program

What is it?

This report displays tables and graphs related to the number of students whose first enrollment is in a class associated with a specific Program.

How will it help me?

This report allows you to see at a glance which Class Program(s) are the most common point of entry for students at your Site(s)/Location(s) for any selected year/month.
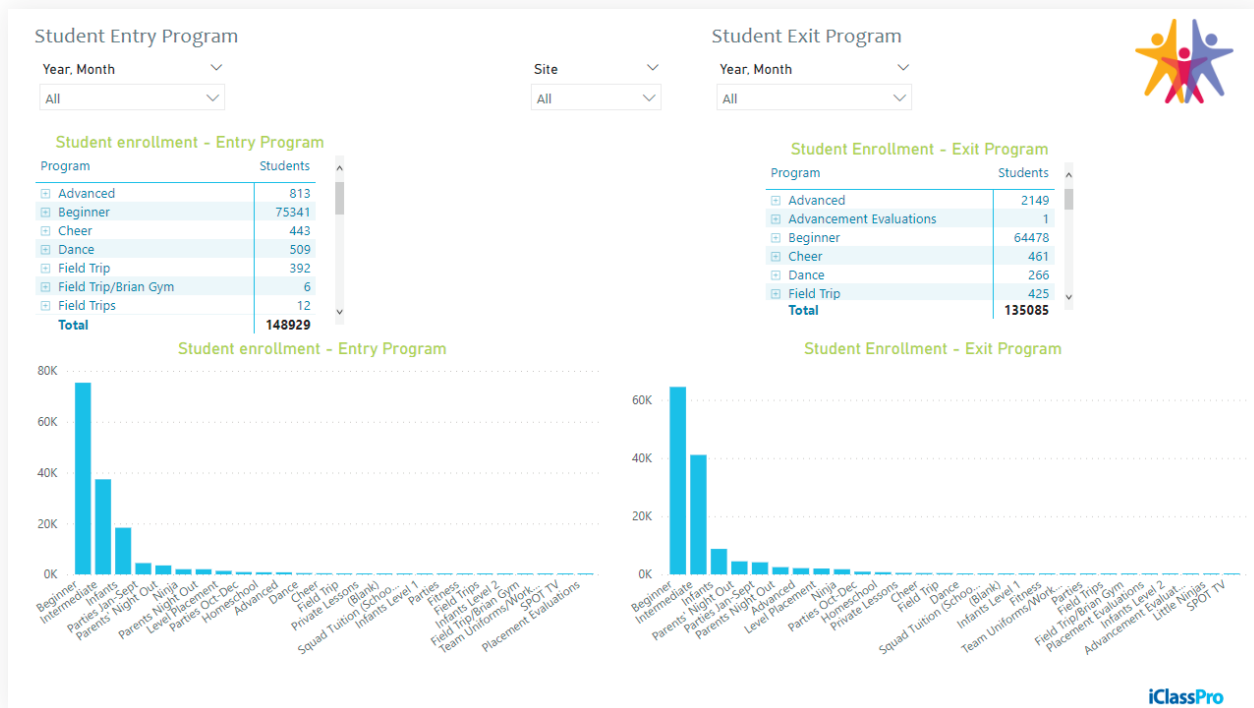
Exit Program

What is it?

This report displays tables and graphs related to the number of students whose last enrollment is in a class associated with a specific Class Program.

- *NOTE: This report does not include enrollments that are ongoing as of the current date. To be included in the "Exit Program" results, a student must have no activity within the past 90 days.*

How will it help me?

This report allows you to see at a glance which Class Program(s) are the most common point of exit for students at your Site(s)/Location(s) for any selected year/month.

Combined Entry/Exit Program

What is it?

This report displays tables and graphs related to which Class Program(s) are the most common point of entry/exit for students at your Site(s)/Location(s) for any selected year/month.

- *NOTE: This report does not include "Exit Program" results for enrollments that are ongoing as of the current date. To be included in the "Exit Program" results, a student must have no activity within the past 90 days.*

How will it help me?

This report allows you to see at a glance which Class Program(s) are the most common point of entry and/or exit for students at your Site(s)/Location(s) for any selected year/month.

Overall Participation (Student Participation)

What is it?

This report displays tables and graphs related to the average length of a student's participation between the start date of their first enrollment through the drop date of their last enrollment, calculated by student gender, Site/Location, and average student age at the time of their first enrollment.

How will it help me?

This report allows you to see at a glance the average participation in months for students enrolled in classes at your Site(s)/Location(s), along with a breakdown by gender and age.

Student Attendance
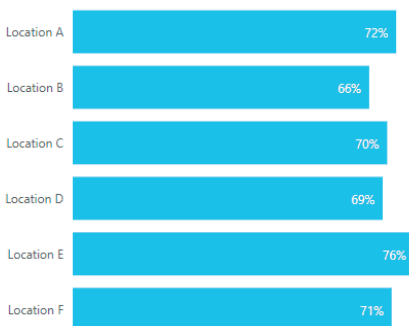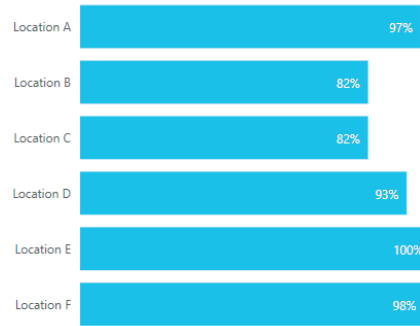
What is it?

This report displays tables and graphs related to the percentage of class/camp meetings for which students were marked "Present" compared to the total number of class/camp meetings.

- *NOTE: By default, these values are only calculated for students with an active enrollment.*

How will it help me?

This report allows you to see at a glance the average class/camp attendance for students enrolled at selected Location(s).

Active Student Age Now

Current Students

6.3
Average Entry Age

7.2
Average Exit Age

12
Average Participation (mths)

Gender	Average Participation
Female	13
Male	10
Unknown	10

Current Students - Age

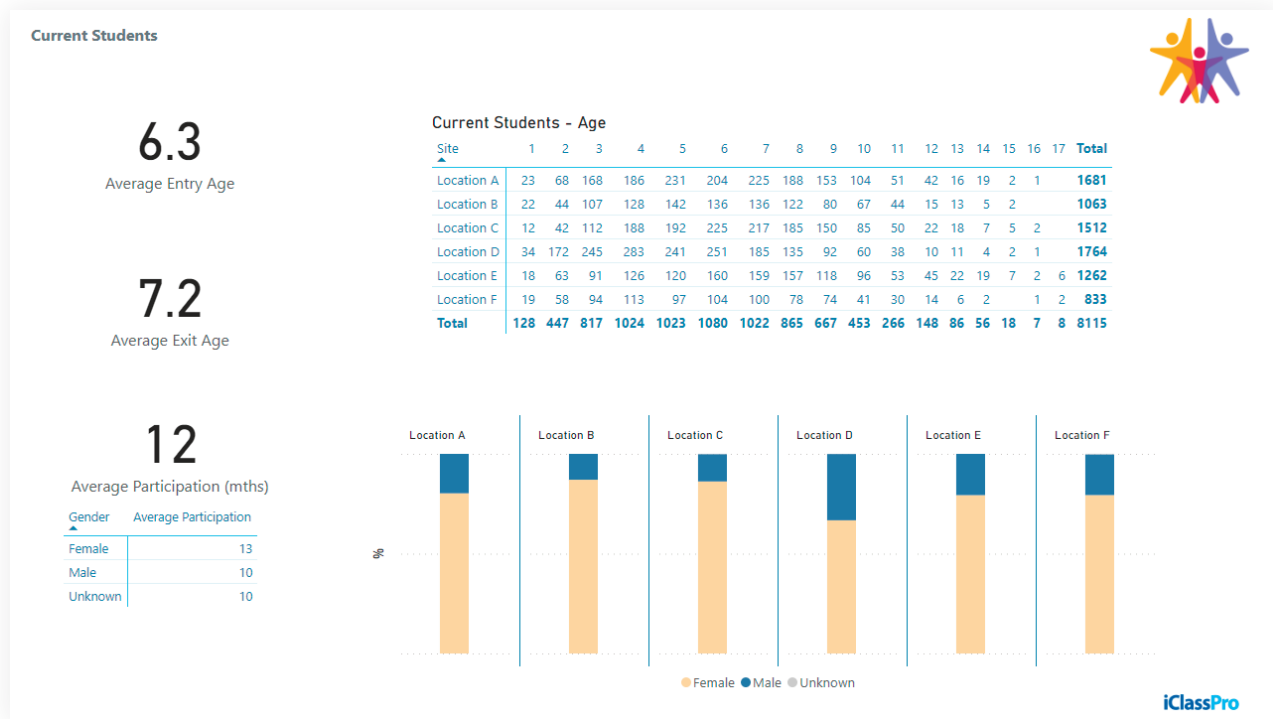| Site	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	Total
Location A	23	68	168	186	231	204	225	188	153	104	51	42	16	19	2	1		1681
Location B	22	44	107	128	142	136	122	80	67	44	15	13	5	2				1063
Location C	12	42	112	188	192	225	217	185	150	85	50	22	18	7	5	2		1512
Location D	34	172	245	283	241	251	185	135	92	60	38	10	11	4	2	1		1764
Location E	18	63	91	126	120	160	159	157	118	96	53	45	22	19	7	2	6	1262
Location F	19	58	94	113	97	104	100	78	74	41	30	14	6	2		1	2	833
Total	**128**	**447**	**817**	**1024**	**1023**	**1080**	**1022**	**865**	**667**	**453**	**266**	**148**	**86**	**56**	**18**	**7**	**8**	**8115**

What is it?

This report displays tables and graphs related to "Average Entry Age", "Average Exit Age", "Average Participation (in months)", "Average Participation by Gender", and "Current Students - Age" based on students enrolled at the selected Site(s)/Location(s).
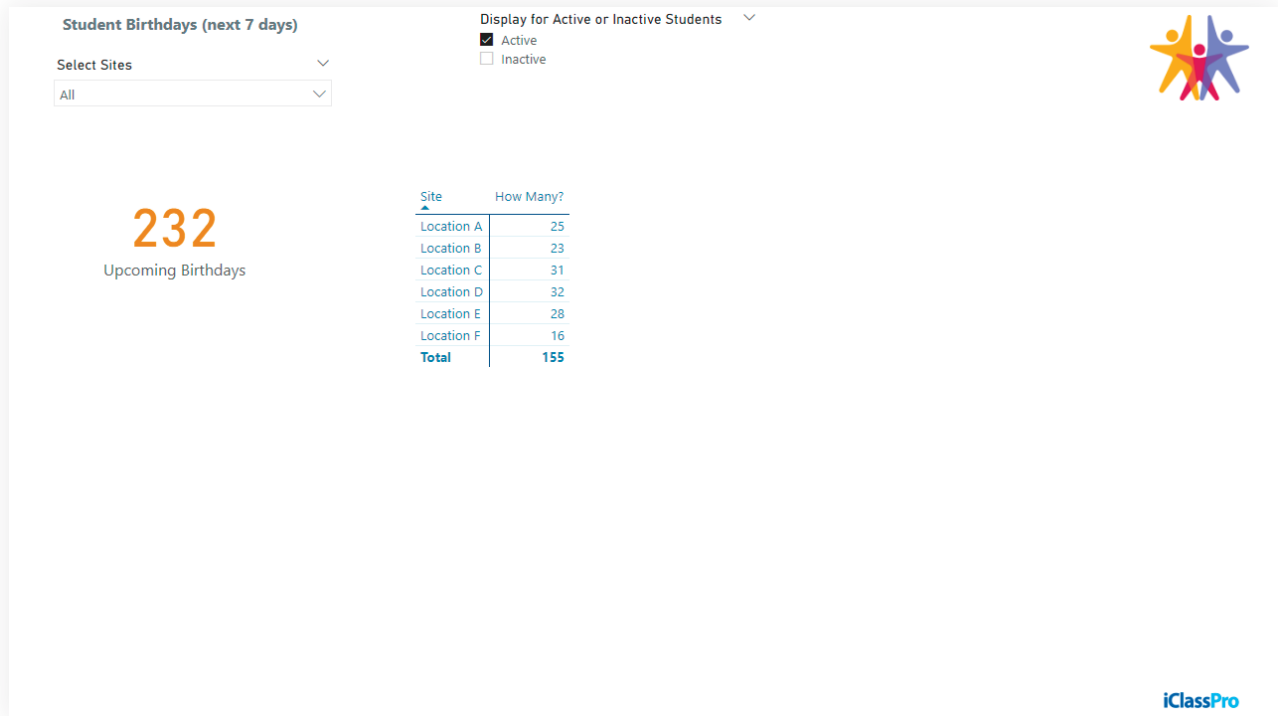
- *By default, these values are only calculated for students of all genders with an active enrollment.*
  - *NOTE: This report does not include enrollments that are ongoing as of the current date. To be included in the "Exit Age" results, a student must have no activity within the past 90 days.*

How will it help me?

This report allows you to see at a glance important information related to student ages, average overall enrollment duration, and current participation data enrolled at selected Location(s).

Birthdays Next 7 Days

What is it?

This report displays information related to the total number of students with birthdays within the next seven days (calculated from the current date).

- *By default, these values are only calculated for students with an active enrollment.*

How will it help me?

This report allows you to see at a glance the number of students with upcoming birthdays (within the next seven days) that are enrolled at selected Location(s).

Time in Level (Average time spent in each Level)

What is it?

This report displays tables and graphs related to the average student duration in each Class Level, calculated from their start date in a class with that Level attached through the most recent drop date in any other class attached to the same Class Level. The results can be further filtered by the Program attached to the class.

- *NOTE: If the student has an active enrollment without an assigned drop date, the total of active months enrolled is calculated based on the start date of their first enrollment to the current date.*

How will it help me?

This report allows you to see at a glance the average time spent in class(es) associated with a specific Class Level and/or Program at selected Location(s).

Evaluations Completed/Levels Passed
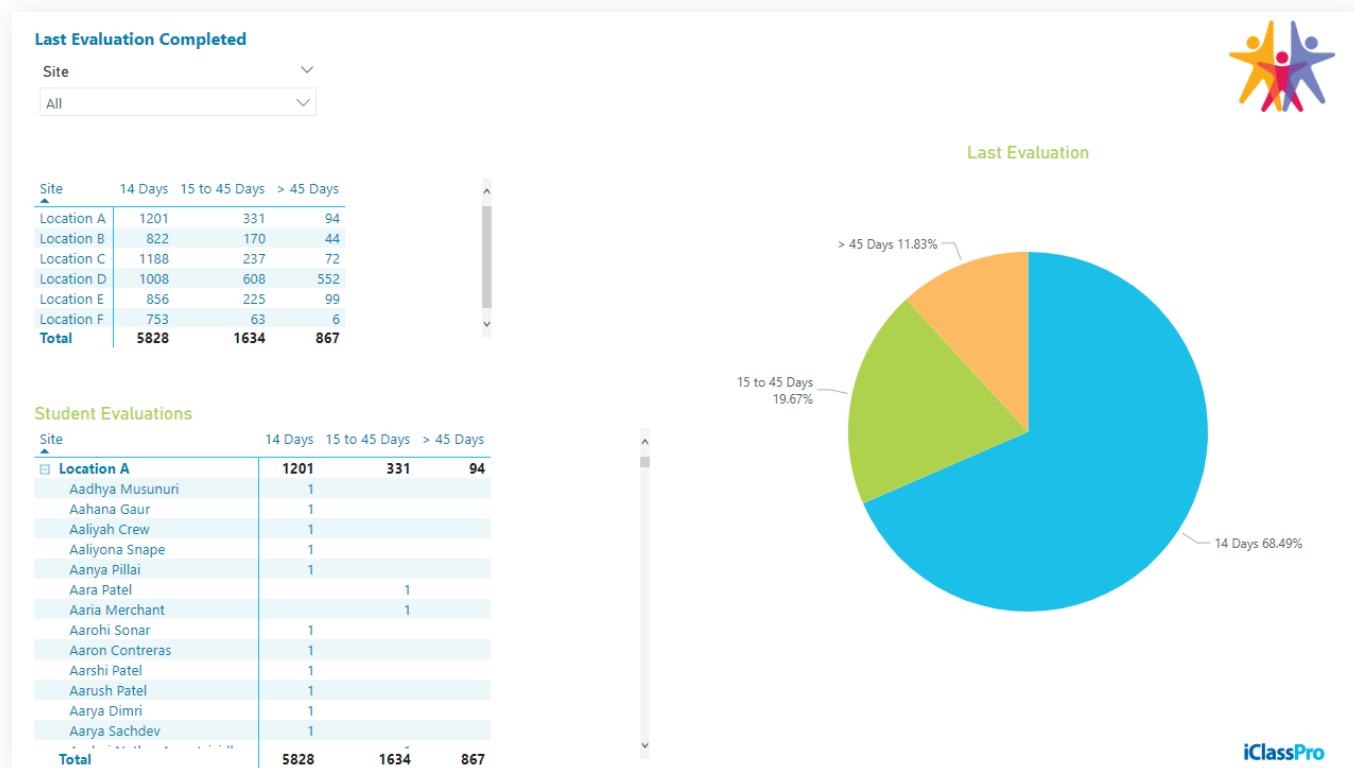

What is it?

This report includes tables displaying the number of "Evaluations Completed" and "Levels Completed" divided by Site/Location, defaulting to a date range of the last six months (from the current date).

How will it help me?

This report allows you to see at a glance the number of Skill Evaluations completed and/or Levels Passes at selected Location(s).

Last Evaluation Completed

What is it?

This report includes tables displaying the number of "Evaluations Completed" within specific time frames for each Site/Location *(measured either 14 days, 15-45 days, or more than 45 days prior to the current date).*

- *By default, these values are calculated for students at all Sites/Locations.*

How will it help me?

This report allows you to see at a glance how many skill evaluations are being performed at each Site/Location, and how these numbers compare with each other.

Families (Family Participation and Spend)

Family Participation and Spend

Calculate for Active or Inactive Families
- ■ Active
- ☐ Inactive

23
Average Participation (mths)

Family Participation Timeframe

Months

	Location A	Location B	Location C	Location D	Location E	Location F
	23.4	20.8	22.2	21.5	25.8	19.8

Average Family Spend

Site	$
Location A	1,420.22
Location B	1,069.99
Location C	1,386.27
Location D	1,312.05
Location E	1,298.12
Location F	1,087.84
Total	**1,278.40**

Average Students/Family

Site	Average of Students
Location A	1.73
Location B	1.64
Location C	1.57
Location D	1.77
Location E	1.77
Location F	1.63
Total	**1.69**

SMS Opt Out

Site	Opt Out
Location A	335
Location B	161
Location C	202
Location D	433
Location E	263
Location F	174
Total	**1568**

Email Unsubscribed

Site	Unsubscribed
Location A	122
Location B	69
Location C	105
Location D	240
Location E	141
Location F	117
Total	**794**

iClassPro

What is it?

This report consists of several charts and tables providing several different metrics related to family participation:

- Family Participation Timeframe/Overall Participation
  - *This bar chart reflects the average number of months a family is enrolled at each Site/Location. This calculation takes into account enrollments for all students in the family, from the start date of the earliest enrollment to the drop date of the final enrollment.*

- Average Family Spend

  - *This table reflects the average amount a single family spends within the time frame during which they are actively enrolled, divided by location.*

- Family Members (Average Students/Family)

  - *This table reflects the average number of students linked to a single family, divided by Site/Location.*

- SMS Opt Out/Email Unsubscribed

  - *These tables reflect information related to communication with families:*
    - *The number of unique phone numbers that have opted out of SMS/Text Messaging, divided by Site/Location.*
    - *The number of unique email addresses that have opted out of Email Blasts, divided by Site/Location.*

How will it help me?

This report allows you to see at a glance various metrics related to family accounts at each Site/Location, and how these numbers compare with each other.

Residential Site/Location
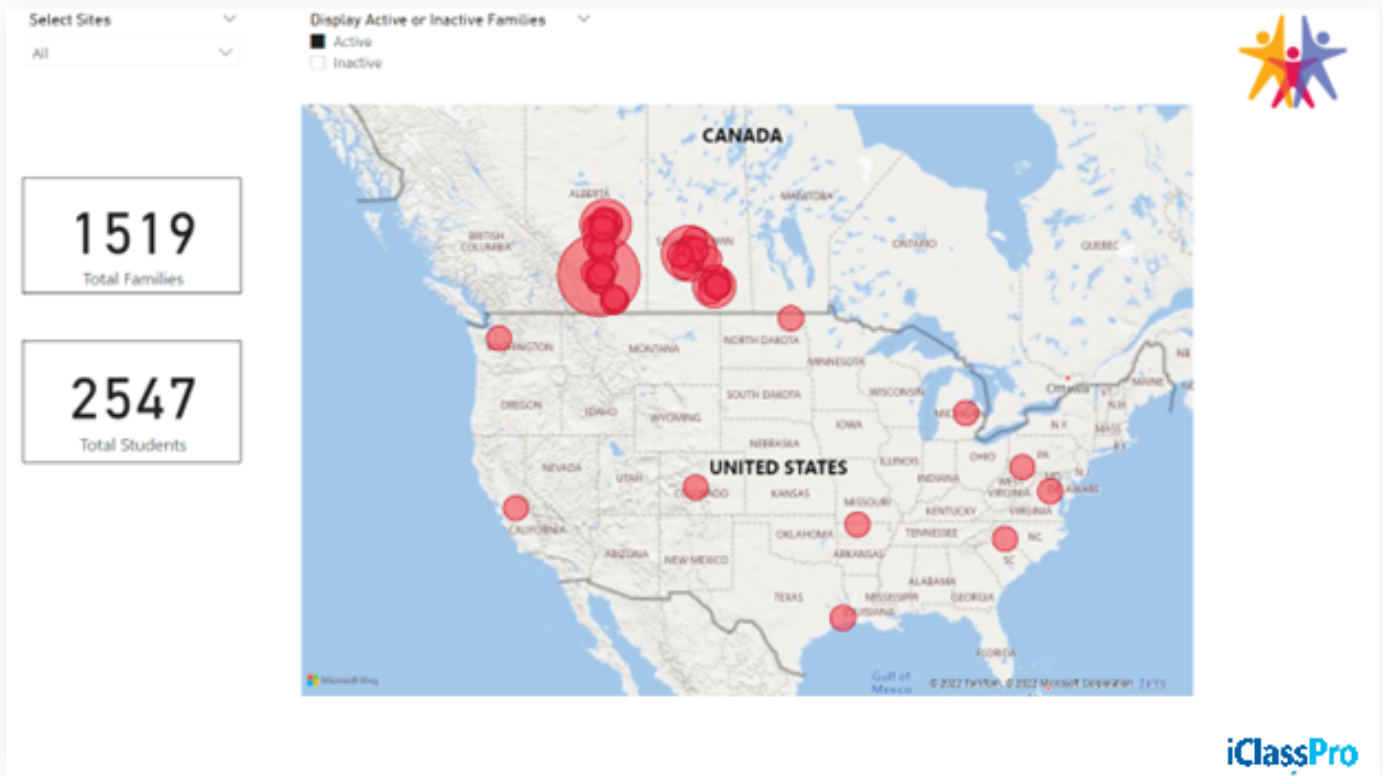
What is it?

This report consists of information related to the total number of family/student accounts, along with a map indicating the physical location(s) of these families *(based on the address(es) linked to the guardians).*

- *By default, these values are calculated only for Active families/students at all Sites/Locations.*

How will it help me?

This report allows you to see at a glance how many total family and student accounts exist within the selected Site(s)/Locations, as well as where these families are located within a given geographic area.

Congratulations!

You have successfully learned about the reports included in your Power BI Starter Template! Feel free to refer to this guide any time you need a "refresher" when viewing the report options.

Questions?

Please feel free to reach out to our helpful support team **here!**