**Update Success Automations for Next Academic Year**

After Part 2 of the Success roll forward is complete, you will need to update the automations we are using to count completed tasks, events (meetings), and employability milestones. We have a series of declarative lookup rollup summary (DLRS) automations that count items completed "this year" and rely on a definition of what "this year" means. For example, the 2020-21 Success Academic year began on August 24 2020, but the Success Academic Year for 2021-22 begins on August 23 2021. Because these dates are "hard coded" in the calculations and change each year, you must also update these each year.  
  
Like the other annual data tasks, particularly for Success, these updates will need to be completed in a specific order. You must confirm that the End of the Year Success freeze into Student Progressions has already happened. You should also confirm that Part 2 of the roll forward has already happened. The Success freeze uses some of the data that will be overwritten when you update the DLRS automations. It is very important that you confirm that this data is already "frozen" before proceeding.  
  
For each DLRS you will need to complete 2 steps:  
1) update the dates  
2) Force Calculate  
  
Updating the dates will mean updating the relationship criteria that the DLRS is using. Where it previously said last year's date e.g. 2020-08-24, it should now say this year's date e.g. 2021-08-23.

Force Calculate is when you are telling the DLRS to recalculate the count (or other aggregation) based on the new relationship criteria. This will then run the count for every Program Record. It is important to run the force calculate when users are not interacting with the Program Records since this force calculate will update every record. As of August 2021 this is around 55,000 records that will be updated. It will take time for each DLRS to run the calculation on all of these records so you will need to plan accordingly and prioritize the calcuations that are more relevant in the Fall, i.e. prioritize the fall engagement DLRS over the spring engagement DLRS.  
  
As of August 2021, these are the DLRS automations that need to be updated for each academic year. You will need to check the logic at the beginning of the academic year and check in with Programs to determine if these are still relevant and determine if we are still calculating these in Salesforce rather than the data warehouse or PowerBI

DLRS List:

[Success Career Relevant Exp This Year](https://bottom-line.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOiJvbmU6YWxvaGFQYWdlIiwiYXR0cmlidXRlcyI6eyJhZGRyZXNzIjoiaHR0cHM6Ly9ib3R0b20tbGluZS0tZGxycy5uYTE2MS52aXN1YWwuZm9yY2UuY29tL2FwZXgvbWFuYWdlbG9va3Vwcm9sbHVwc3VtbWFyaWVzP2lkPW0wMDFZMDAwMDAwVFJ6WlFBVyZzZmRjSUZyYW1lT3JpZ2luPWh0dHBzJTNBJTJGJTJGYm90dG9tLWxpbmUubGlnaHRuaW5nLmZvcmNlLmNvbSJ9LCJzdGF0ZSI6e319)

[Success Career Rel Exp BEFORE This Year](https://bottom-line.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOiJvbmU6YWxvaGFQYWdlIiwiYXR0cmlidXRlcyI6eyJhZGRyZXNzIjoiaHR0cHM6Ly9ib3R0b20tbGluZS0tZGxycy5uYTE2MS52aXN1YWwuZm9yY2UuY29tL2FwZXgvbWFuYWdlbG9va3Vwcm9sbHVwc3VtbWFyaWVzP2lkPW0wMDFZMDAwMDAwNEZOWlFBMiZzZmRjSUZyYW1lT3JpZ2luPWh0dHBzJTNBJTJGJTJGYm90dG9tLWxpbmUubGlnaHRuaW5nLmZvcmNlLmNvbSJ9LCJzdGF0ZSI6e319)

[Success Complete Emp Miles This Year](https://bottom-line.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOiJvbmU6YWxvaGFQYWdlIiwiYXR0cmlidXRlcyI6eyJhZGRyZXNzIjoiaHR0cHM6Ly9ib3R0b20tbGluZS0tZGxycy5uYTE2MS52aXN1YWwuZm9yY2UuY29tL2FwZXgvbWFuYWdlbG9va3Vwcm9sbHVwc3VtbWFyaWVzP2lkPW0wMDFZMDAwMDAwVFJ6VVFBVyZzZmRjSUZyYW1lT3JpZ2luPWh0dHBzJTNBJTJGJTJGYm90dG9tLWxpbmUubGlnaHRuaW5nLmZvcmNlLmNvbSJ9LCJzdGF0ZSI6e319)

[Success Contact Attempts This Year](https://bottom-line.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOiJvbmU6YWxvaGFQYWdlIiwiYXR0cmlidXRlcyI6eyJhZGRyZXNzIjoiaHR0cHM6Ly9ib3R0b20tbGluZS0tZGxycy5uYTE2MS52aXN1YWwuZm9yY2UuY29tL2FwZXgvbWFuYWdlbG9va3Vwcm9sbHVwc3VtbWFyaWVzP2lkPW0wMDFZMDAwMDAwVFJyeVFBRyZzZmRjSUZyYW1lT3JpZ2luPWh0dHBzJTNBJTJGJTJGYm90dG9tLWxpbmUubGlnaHRuaW5nLmZvcmNlLmNvbSJ9LCJzdGF0ZSI6e319)

[Total Completed Eng Events This Spring](https://bottom-line.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOiJvbmU6YWxvaGFQYWdlIiwiYXR0cmlidXRlcyI6eyJhZGRyZXNzIjoiaHR0cHM6Ly9ib3R0b20tbGluZS0tZGxycy5uYTE2MS52aXN1YWwuZm9yY2UuY29tL2FwZXgvbWFuYWdlbG9va3Vwcm9sbHVwc3VtbWFyaWVzP2lkPW0wMDFZMDAwMDAwNEZNV1FBMiZzZmRjSUZyYW1lT3JpZ2luPWh0dHBzJTNBJTJGJTJGYm90dG9tLWxpbmUubGlnaHRuaW5nLmZvcmNlLmNvbSJ9LCJzdGF0ZSI6e319)

[Total Completed Events This Year](https://bottom-line.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOiJvbmU6YWxvaGFQYWdlIiwiYXR0cmlidXRlcyI6eyJhZGRyZXNzIjoiaHR0cHM6Ly9ib3R0b20tbGluZS0tZGxycy5uYTE2MS52aXN1YWwuZm9yY2UuY29tL2FwZXgvbWFuYWdlbG9va3Vwcm9sbHVwc3VtbWFyaWVzP2RldmVsb3Blck5hbWU9VG90YWxDb21wbGV0ZWRFdmVudHNUaGlzWWVhciZzZmRjSUZyYW1lT3JpZ2luPWh0dHBzJTNBJTJGJTJGYm90dG9tLWxpbmUubGlnaHRuaW5nLmZvcmNlLmNvbSJ9LCJzdGF0ZSI6e319)

[Total Completed Tasks This Spring](https://bottom-line.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOiJvbmU6YWxvaGFQYWdlIiwiYXR0cmlidXRlcyI6eyJhZGRyZXNzIjoiaHR0cHM6Ly9ib3R0b20tbGluZS0tZGxycy5uYTE2MS52aXN1YWwuZm9yY2UuY29tL2FwZXgvbWFuYWdlbG9va3Vwcm9sbHVwc3VtbWFyaWVzP2RldmVsb3Blck5hbWU9VG90YWxDb21wbGV0ZWRUYXNrc1RoaXNTcHJpbmcmc2ZkY0lGcmFtZU9yaWdpbj1odHRwcyUzQSUyRiUyRmJvdHRvbS1saW5lLmxpZ2h0bmluZy5mb3JjZS5jb20ifSwic3RhdGUiOnt9fQ%3D%3D)

[Total Completed Tasks This Year](https://bottom-line.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOiJvbmU6YWxvaGFQYWdlIiwiYXR0cmlidXRlcyI6eyJhZGRyZXNzIjoiaHR0cHM6Ly9ib3R0b20tbGluZS0tZGxycy5uYTE2MS52aXN1YWwuZm9yY2UuY29tL2FwZXgvbWFuYWdlbG9va3Vwcm9sbHVwc3VtbWFyaWVzP2RldmVsb3Blck5hbWU9VG90YWxDb21wbGV0ZWRUYXNrc1RoaXNZZWFyJnNmZGNJRnJhbWVPcmlnaW49aHR0cHMlM0ElMkYlMkZib3R0b20tbGluZS5saWdodG5pbmcuZm9yY2UuY29tIn0sInN0YXRlIjp7fX0%3D)

[Total Prog Events Attended This Spring](https://bottom-line.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOiJvbmU6YWxvaGFQYWdlIiwiYXR0cmlidXRlcyI6eyJhZGRyZXNzIjoiaHR0cHM6Ly9ib3R0b20tbGluZS0tZGxycy5uYTE2MS52aXN1YWwuZm9yY2UuY29tL2FwZXgvbWFuYWdlbG9va3Vwcm9sbHVwc3VtbWFyaWVzP2RldmVsb3Blck5hbWU9VG90YWxQcm9nRXZlbnRzQXR0ZW5kZWRUaGlzU3ByaW5nJnNmZGNJRnJhbWVPcmlnaW49aHR0cHMlM0ElMkYlMkZib3R0b20tbGluZS5saWdodG5pbmcuZm9yY2UuY29tIn0sInN0YXRlIjp7fX0%3D)

[Total Completed Eng Events This Fall](https://bottom-line.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOiJvbmU6YWxvaGFQYWdlIiwiYXR0cmlidXRlcyI6eyJhZGRyZXNzIjoiaHR0cHM6Ly9ib3R0b20tbGluZS0tZGxycy5uYTE2MS52aXN1YWwuZm9yY2UuY29tL2FwZXgvbWFuYWdlbG9va3Vwcm9sbHVwc3VtbWFyaWVzP2lkPW0wMDVkMDAwMDAwZno2T0FBUSZzZmRjSUZyYW1lT3JpZ2luPWh0dHBzJTNBJTJGJTJGYm90dG9tLWxpbmUubGlnaHRuaW5nLmZvcmNlLmNvbSJ9LCJzdGF0ZSI6e319)

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