**Important Updates to your Success Program Goals Dashie**

**Date of Release: 1/28/2022**

With Q2 Step-backs approaching, you're going to want to know exactly where you stand and how much progress you're making towards your goals.

Let the Success Program Goals dashboard help you out!

[](https://app.powerbi.com/groups/me/apps/43578119-a96e-44b0-9099-faad9f3b9f50/reports/f5f92230-67ac-4766-aff1-7a80c3bdf746/ReportSection?ctid=97405bf3-68fc-4681-aa9f-205c2a526573" \t "_blank)

[Success Program Goals Dashboard](https://app.powerbi.com/groups/me/apps/43578119-a96e-44b0-9099-faad9f3b9f50/reports/f5f92230-67ac-4766-aff1-7a80c3bdf746/ReportSection?ctid=97405bf3-68fc-4681-aa9f-205c2a526573" \t "_blank)

**Update- Summary & Highlights**

This Success Program Goals dashboard update is the first of a series of upcoming releases to help improve your user experience in Power BI.

In this first wave of improvements, we focused on resolving major reported bugs and added a few Quality of Life improvements to your slicer navigation.

**New Features & Improvements**

**​​​​​New feature- Slicer Enhancements: Search bars, "Select All", and Region drop-downs in strategic slicers**

1. Region/Advisor, College Attending, and Fee for Service Partner slicers now feature a search bar inside the drop-down menu
2. Fee for Service Partner and College Attending slicers now offer the option to "Select All" from the drop-down menu
3. College Attending Slicer can now be sorted by region, making it easier than ever to look at specific clusters of schools within a region

Find your name quickly by using the new drop-down search bar

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Quickly access specific clusters of schools within your region

**Break-fix improvements:  graph and gauge visualizations, updated tooltip information, and corrected denominators**

1. Student Engagement graph
   1. graph previously showed the number of students with 0, 1, and 2+ engagements. We added a third category to make it easier to visualize and understand your engagement and average caseload meeting goals
   2. the tooltip now shows the updated goal based on average caseload meetings
   3. due date has been updated
2. Active Students, Paid Bills, Credits Earned, EMs completed this year, and Student Enrollment gauges
   1. the tooltip for these visuals now shows updated language and/or due dates for these goals
3. FAFSA Processed
   1. the tooltip for this visual now shows updated FAFSA year and due date
4. Winter Reflective Conversation
   1. the denominator was adjusted to match the change made to this goal at the start of the academic year (was 85%, now is 80%)
   2. tooltip for this visual now reflects the changes to the goal as well as updated due dates
5. Contact Attempts
   1. Denominator was adjusted to exactly match the number of students with 0 engagements seen in the Advisor Caseload Dashboard

**Issues (unresolved) & Upcoming features**

**Issues - Removal of "Graduated" students from Fall Goals denominators**

1. After carefully reviewing many of the reported issues in the Success UI teams channel, we identified a problem related to the "Graduated" Stage. For this reason, a decision was made to remove any students with Stage = Graduated from the Success Program Goals dashboard, specifically for the Fall Semester.
2. This change only affected 21 students at the time of release. Thus, we don't anticipate any major disruptions to overall advisor goal performance evaluation
3. We will continue to work with your Data Governance and Programs leadership teams to keep any disruptive effects of this temporary change to a minimum.

**Issues - Contact Attempts overcount**

1. The Contact Attempts gauge is currently overstating the progress towards this goal by counting ALL the contact attempts made for a single students, instead of stopping the count after a student reaches 15 attempts. And, unfortunately, this issue is unlikely to be fixed before Q2 Step-backs.

**Issues - Updates affecting Bookmarks**

1. Shortly after the updates were released, we received notice that the new slicers and features were not necessarily working as intended but only for those users who have personalized bookmarks saved in their Success Advisor Dashie settings. The good news is that this is very easy to fix! If you scroll to the end of this update, you will find a video guide on how to fix this problem.
2. If you can't watch a video right now, here are the steps you should follow:​​​​​​​

From your Success Advisor app, find the "Reset to default" button located on your top right-hand menu

Click "Reset" to clear all personalized bookmarks

After bookmarks are clear, go ahead and re-select all the specific slicers you would like to bookmark again

When you are done selecting your slicers, click on the Personal Bookmarks button located in the upper right-hand side of your dashboard

Locate the bookmark you would like to update and expand the menu by clicking the ellipsis

Click "Update"- after this step, your bookmark should be fixed and show the new slicer updates correctly

**If you believe either of these issues will have a significant impact on you/your caseload, please reach out to your manager- they will be prepared to assist you and offer further guidance, where applicable**

**Upcoming Features - New UI, Spring toggle capabilities, and further break-fixes**

1. Visit the Success/Success UI channels to hear more about these new features and their tentative timelines!

**[Meeting w\_Emelda-20220128\_112028-Meeting Recording.mp4](https://tbl500amory-my.sharepoint.com/:v:/g/personal/ksordia_bottomline_org/EY52DZdzyZBAmGrHUxhZUEUBK5fzstCj1pEdiX8hOa3U1A?e=Cj7KbB" \t "_blank)**