

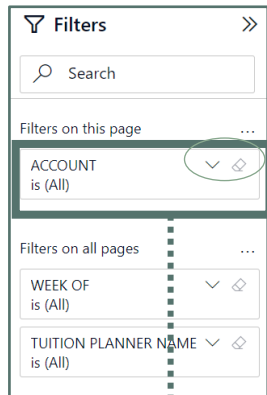
Sample Dashboard & Documentation *Operational.*



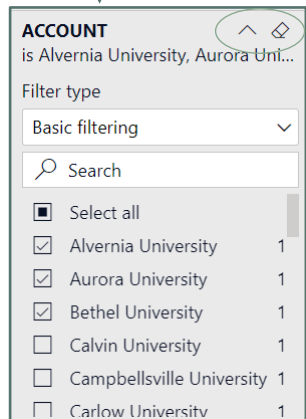
Filtering information in Power BI:

There are 2 main ways to narrow the portion of the datasets that are shown in the report visualizations.

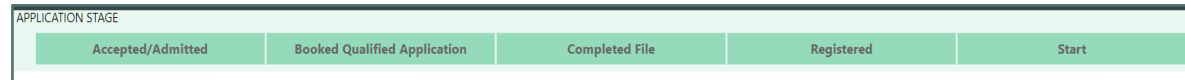
1. Via the Filter pane



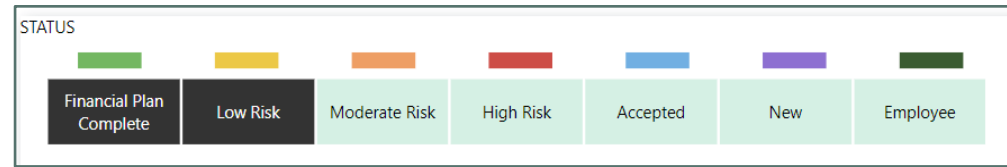
- Click the arrow icon to expand/collapse the options.
- Click the eraser icon to clear all selected choice.
- A highlighted filter indicates that it is active.



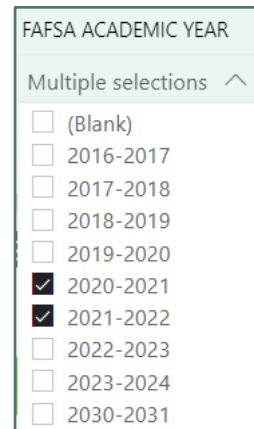
2. Via the Slicers



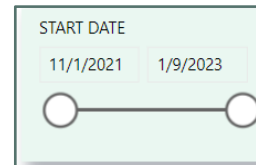
Buttons slicer.



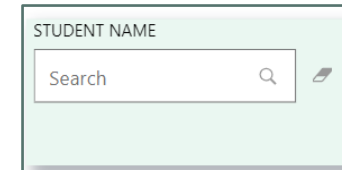
Button slicer with attached legend.



Dropdown menu slicer.



Time range slicer.



Text lookup slicer.

- Slicers are filters that are located on the report canvas for easier access.
- Users may filter the displayed information through multiple slicers and filters.
- Multi-select is available on all slicers, except for on the *time range* and *text lookup* slicer, where this is not applicable.
- To remove the selected filter, uncheck the box.

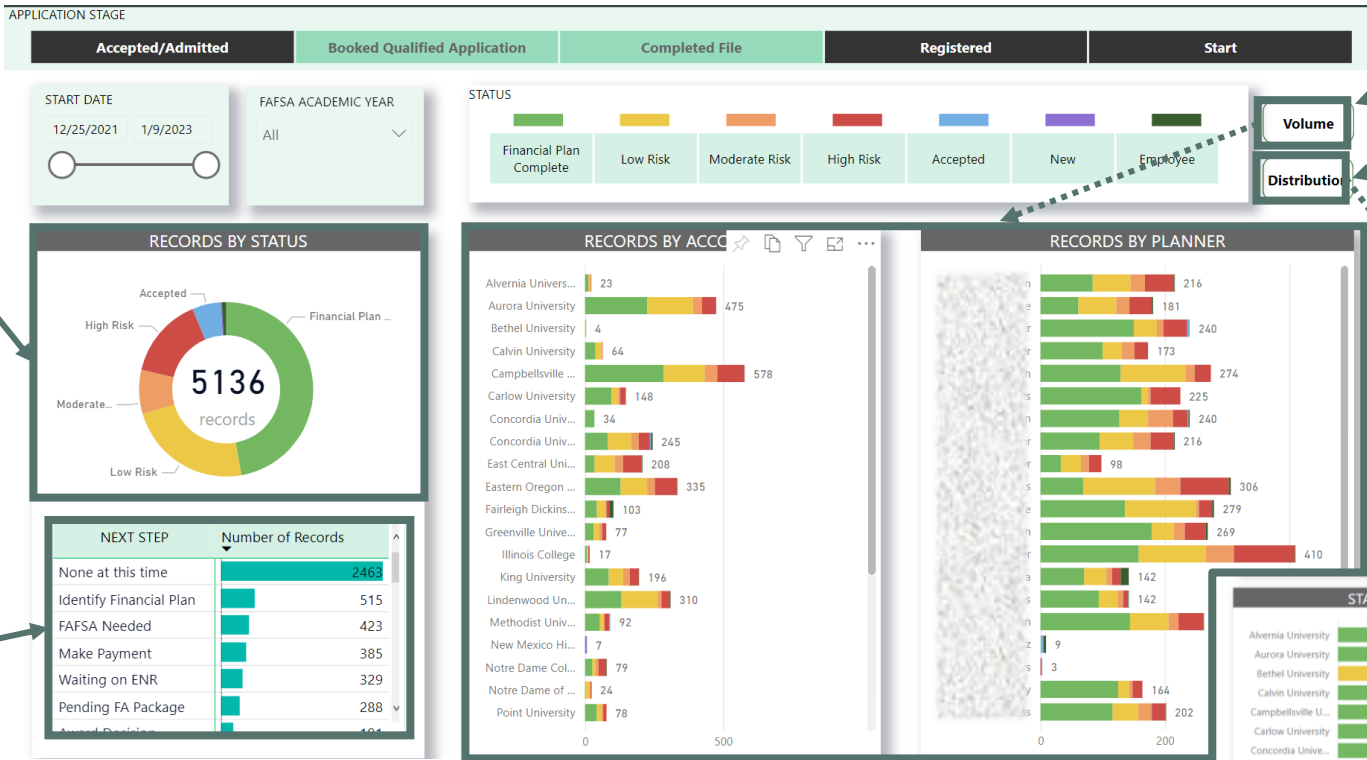
Page I:

Display an overall distribution of the statuses.

The total count is available in the center, with count of each portion available upon hovering.

Display the number of records by their Next Step, with data bar in the background for easy comparison.

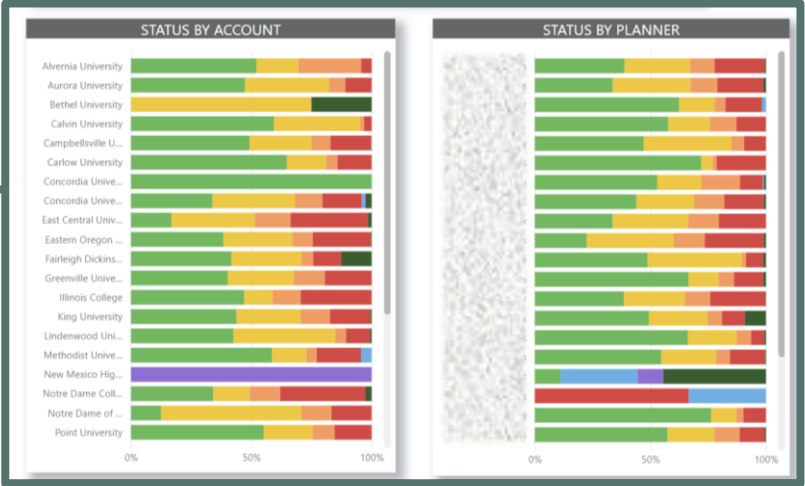
User can sort descending/ascending by clicking on the field.



Click the buttons to choose how the data is displayed here.

Volume button shows the number of records per Account / Agent, broken down by their status.

Distribution button shows how the status of these records is distributed per Account/ Agent once the totals are standardized.



Page II:

Various ways to filter the data available via the slicers or the filter pane.

This table allows users to view records individually.

Users may click on the STUDENT NAME to be directed to the record in SRP.

APPLICATION STAGE

Accepted/Admitted

Booked Qualified Application

Completed File

Registered

Start

ACCOUNT

All

START DATE

12/25/2021 1/9/2023

FAFSA ACADEMIC YEAR

All

TUITION PLANNER NAME

Search

STUDENT NAME

Search

NEXT STEP

All

DAYS UNTIL START DATE

All

STATUS

Financial Plan Complete Low Risk Moderate Risk High Risk Accepted New Employee

NAME	STUDENT NAME	STUDENT ID	PRIMARY FINANCIAL PLAN	STATUS	NEXT STEP	FAFSA ON FILE	FAFSA ACADEMIC YEAR	OPPORTUNITY STAGE	OPPORTUNITY SUB-STAGE	SAP STATUS	SCHOLARSHIP	DAYS UNTIL START DATE	START DATE	SECONDARY FINANCIAL PLAN
▼		J02242022	FA	Financial Plan Complete	None at this time	No	2021-2022	Start		MET		-22	1/10/2022	
▼		J02305708	FA	Financial Plan Complete	None at this time	Yes	2021-2022	Start		MET		-22	1/10/2022	
▼		790352439	OOP	Financial Plan Complete	None at this time	No	2021-2022	Registered	Engaged	MET		-14	1/18/2022	Payment Plan
▼		J02302551	FA	Financial Plan Complete	None at this time	Yes	2021-2022	Start		MET		-22	1/10/2022	
▼		790910574	FA	Low Risk	Make Payment	Yes	2021-2022	Registered	Engaged	MET		-14	1/18/2022	Payment Plan
▼		790908790	Veteran Benefits	Moderate Risk	Military Reqs	Pending		Registered	Engaged	MET		-14	1/18/2022	
▼		J02175620	Payment Plan	Financial Plan Complete	None at this time	No	2021-2022	Start		MET		-22	1/10/2022	
▼		790781727	Military Tuition Assistance	Moderate Risk	Military Reqs	No	2021-2022	Registered	Engaged	MET		-14	1/18/2022	
▼		790909596	Payment Plan	Financial Plan Complete	None at this time	No	2021-2022	Registered	Engaged	MET		-14	1/18/2022	Other
▼		790223444	OOP	Financial Plan Complete	None at this time	No	2021-2022	Registered	Engaged	MET		-14	1/18/2022	
▼		790639527	FA	Financial Plan Complete	None at this time	Yes	2021-2022	Registered	Engaged	MET		-14	1/18/2022	
▼		790283895	OOP	Financial Plan Complete	None at this time		2021-2022	Registered	Engaged	MET		-14	1/18/2022	

Filters

Search

Filters on this page

ACCOUNT is (All)

Filters on all pages

WEEK OF is (All)

TUITION PLANNER N... is (All)