**UI Update for Success Advisor Dashboards: Release Wave #1 - Success Advisor Caseload**

**Date of Release: 4/12/2022**

The UI update you have been waiting for is finally here! Welcome to your New Success Advisor Caseload dashie.

[](https://app.powerbi.com/groups/me/apps/43578119-a96e-44b0-9099-faad9f3b9f50/reports/9af9f05e-4edd-4a10-a03b-5f8f3351146f/ReportSection66b46d488af9b8304719?ctid=97405bf3-68fc-4681-aa9f-205c2a526573" \t "_blank)

[NEW Success Advisor Caseload dashboard](https://app.powerbi.com/groups/me/apps/43578119-a96e-44b0-9099-faad9f3b9f50/reports/9af9f05e-4edd-4a10-a03b-5f8f3351146f/ReportSection66b46d488af9b8304719?ctid=97405bf3-68fc-4681-aa9f-205c2a526573" \t "_blank)

**Summary & Highlights**

This is a complete overhaul of the Success Advisor Caseload dashboard. It includes a new UI, new filter availability, and small field improvements to help you manage your caseload in the best way possible.

**New Features & Improvements**

**​​​​​ Success Advisor Caseload Dashboard UI 2.0**

1. ​​​​​​​Your Power BI app now features the NEW Success Advisor Caseload dashboard
2. You can find the new dashboard under the "Success Advisor Dashboards" tab
3. You can find all the documentation relevant to this dashboard in the Tech & Data team's [Documentation Site](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Advisor-Caseload-Dashboard.aspx)
4. ​​​​​​​​​​​​​​

Click on the "Success Advisor Dashboards" section of your Power BI app, then click the "Advisor Caseload" tab. This will bring you to the Advisor Caseload dashboard

The new standard UI features an in-dashboard Quick menu that makes it easier to access the slicers most frequently used

The Extended menu offers additional slicers for you to filter your data in a way that best suits your needs

Most slicers have new built-in functionality such as (1) search bars, (2) select all options, and (3) regional divisions to help improve your caseload views and customizations

Clicking on the Bottom Line logo will take you to the Tech & Data Team's DocuSite, where you'll be able to find a comprehensive breakdown of all the data elements and features found in this dashboard

**Need fresh data? We've got you covered!**

1. The underlying dataset for the Success Advisor Caseload Dashboard still refreshes daily, from 6am to 10pm EST
2. The refreshing intervals occur every 30 minutes. If you don't see a recent change reflected, check again at the half-hour mark.

To check when data was last refreshed, press the down arrow next to the dashboard's name and check the "Data updated" information

**[Advisor Caseload Dashboard](https://tbl500amory.sharepoint.com/sites/ReportingDocumentation/SitePages/Advisor-Caseload-Dashboard.aspx" \t "_blank)**

tbl500amory.sharepoint.com

The Advisor Caseload dashboard is one of the core reports used by the Programs teams across all regions. Its main purpose is to provide advisors with a by-name list of students, and to highlight the corresponding Critical Data captured by our adviso…