**Date of Release: 7/6/2022**

We made a couple of small changes to the Success Advisor Caseload Dashboard. Read the details below

[](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)

[Improvements to Success Advisor Dashboards](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 update features the addition of 6 new slicers to the Success advisor caseload dashboard to help you manage your caseload in the best way possible. The slicers included are meant to allow the user to better manage:

* Engagements
* Reflective conversations
* Partnerships

Additionally, we fixed bugs related to the way reflective conversations and Caseload Meetings were being counted

**New Features & Improvements**

**Slicer Additions**

1. **​​​​​​​Your Success Advisor Caseload Dashboard now includes the following new slicers:**
   1. Met Last Week: Highlights all the students who had a recorded meeting during the previous week **\*\***
   2. Meeting This Week: highlights all the students who have a scheduled meeting during the current week, or who had a meeting during the current week **\*\***
   3. Meeting Next Week: highlights all the students who have a scheduled meeting for the upcoming week **\*\***
   4. Winter Reflective Conversation: highlights students who have had a winter reflective conversation
   5. Summer Reflective Conversation: highlights students who have had a summer reflective conversation
   6. Black & Latinx Men: highlights all male-identifying students whose racial and ethnic identities are "Black or African American" and/or "Hispanic and/or Latinx"   
      ​​​
2. **Improved Partnership management**
   1. Throughout the years, Bottom Line has collected information about partnerships in a couple of different ways. The improvements to the "Partner Program" slicer consolidates ALL possible partner relationships into a single slicer. This slicer also offers the option of searching for specific partnerships and shows "Select All" as an option

**\*\*** The "Week" slicers are programmed to show results based on the current day. Weeks run from Sunday to Saturday.   
For example: using the "Meeting This Week" slicer on 7/6/2022 (a Wednesday) will show all the students who had a meeting on or after 7/3/2022 (a Sunday), or that will have a meeting on or before 7/9/2022 (a Saturday)

**Bugs Fixed**

**Advisor Caseload and Program Goals**

**Issue:**

On Friday, July 1st, we received reports that the Success Advisor Caseload and Success Program Goals dashboards were not properly tracking meetings and reflective conversations that happened on 7/1/2022.

**Resolution Summary:**

The Data & Tech team was able to identify the source of the problem as a misalignment between data types. Simply put: Salesforce was giving us "Dates and Times" and we were comparing them to "Dates". We adjusted the data types and Power BI quickly began showing correct counts.

**On Track Projections**

**Issue:**

On Wednesday, July 6th, we received reports that the On Track Projections dashboard was showing every single student as being off track.

**Resolution Summary:**

The Data & Tech team was able to identify the source of the problem. The dashboard was programmed to automatically change academic years starting on 7/2/2022. However, this is not the expected start date for the 2022-23 academic year. Thus, we temporarily adjusted the 2022-23 academic year start date parameters for this dashboard, so it can continue displaying the projections until the year turns over in late August.

**If you experienced any of these issues and you believe your dashboard continues to display incorrect information, please reach out to your manager or program director for follow-up.**