# [Image result for liverpool john moores university logo](https://www.google.co.uk/url?sa=i&rct=j&q=&esrc=s&source=images&cd=&cad=rja&uact=8&ved=0ahUKEwjZuerSu4nXAhWGchQKHbT9CwIQjRwIBw&url=https://www.eventbrite.co.uk/o/liverpool-john-moores-university-roscoe-lectures-3233158788&psig=AOvVaw2rEDE_dQz3fMXV7J1A9n9g&ust=1508941556822069)Process Document

**CRM – Student Advice & Wellbeing**

Liverpool John Moores University

**Student Advice & Wellbeing**

**Dashboards**

Version 0.2, November 2018

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3. **Dashboards**

Each team with SAW has their own Default Dashboard.

Within CRM, the Dashboard acts as a sort of Home page.

You can also create your own personal Dashboards, and new Team Dashboards. If you want to amend/set up a new Dashboard to be shared with a team, we recommend you contact Helpdesk in the first instance.

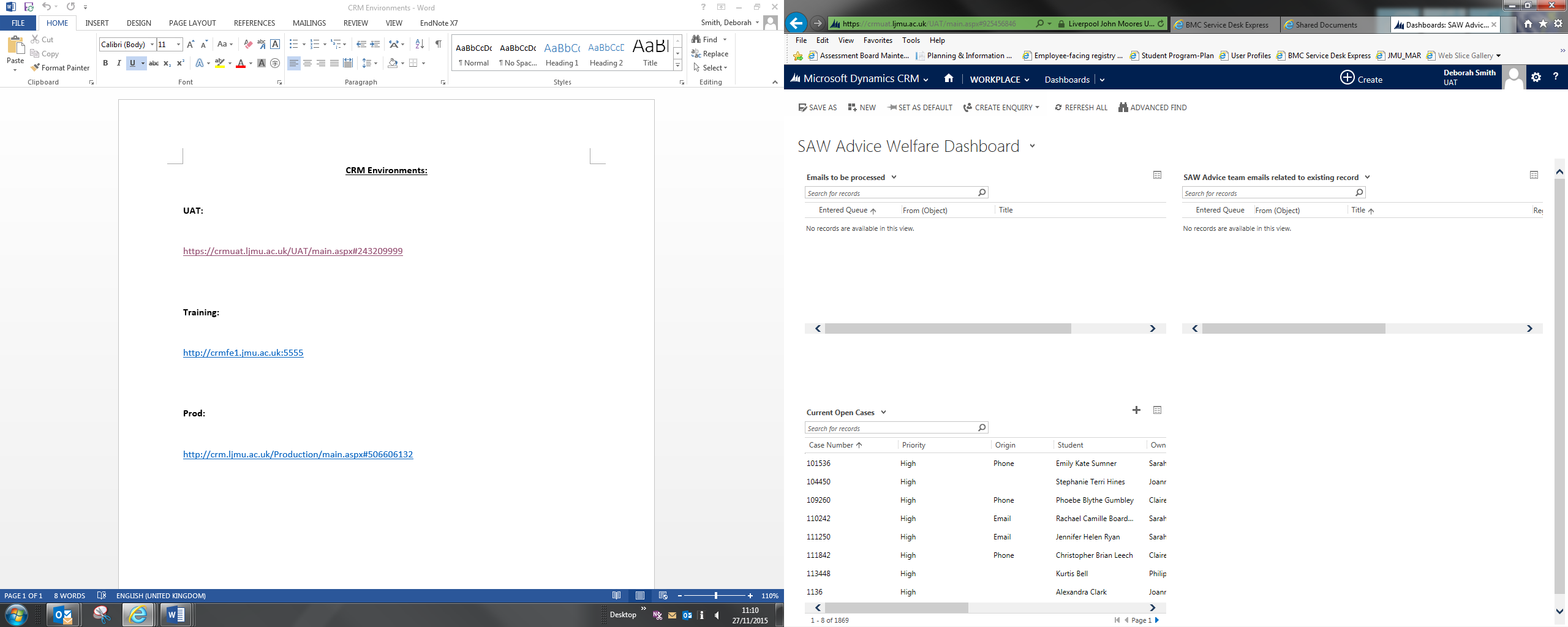
Dashboards can display various information including charts and lists. To add information to a Dashboard, then a View must first exist.

A View is basically a Query which has been set up to bring back a list of information within the parameters selected. An example of a View is ‘Emails to be Processed’

* 1. ***Pinning a Dashboard***

If you do use a number of Dashboards, then you can also pin a particular Dashboard so that it appears as a Default when you log in:

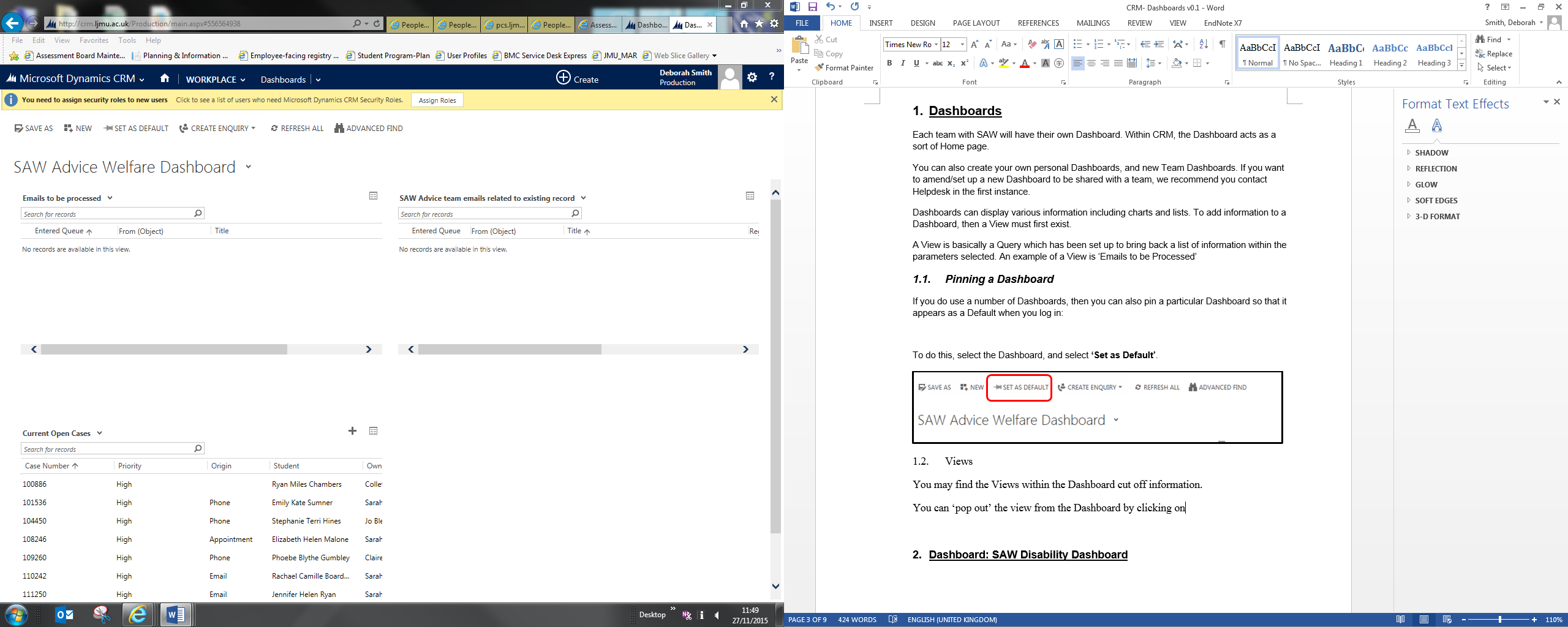
To do this, select the Dashboard, and select **‘Set as Default’**.



* 1. ***Views***
     1. **‘Pop Out’ Function**

You may find the Views within the Dashboard cut off information.

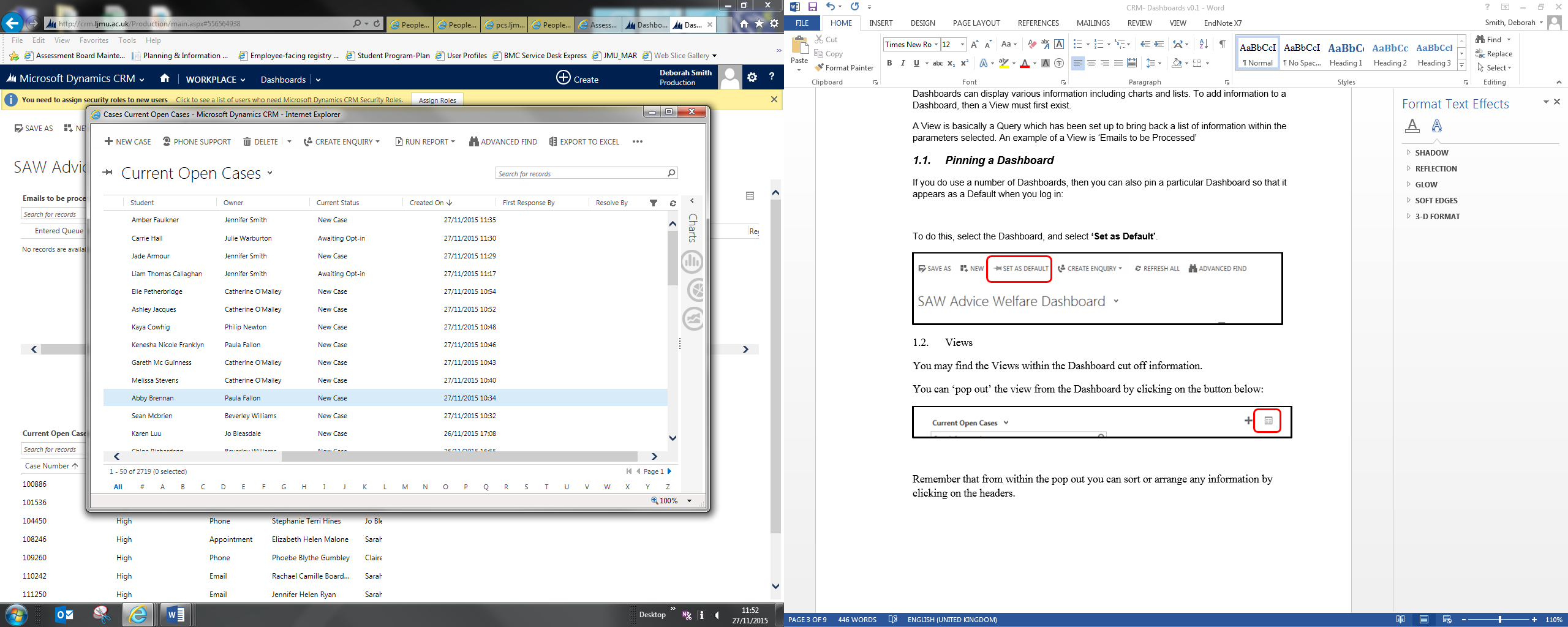
You can ‘pop out’ the view from the Dashboard by clicking on the button below:



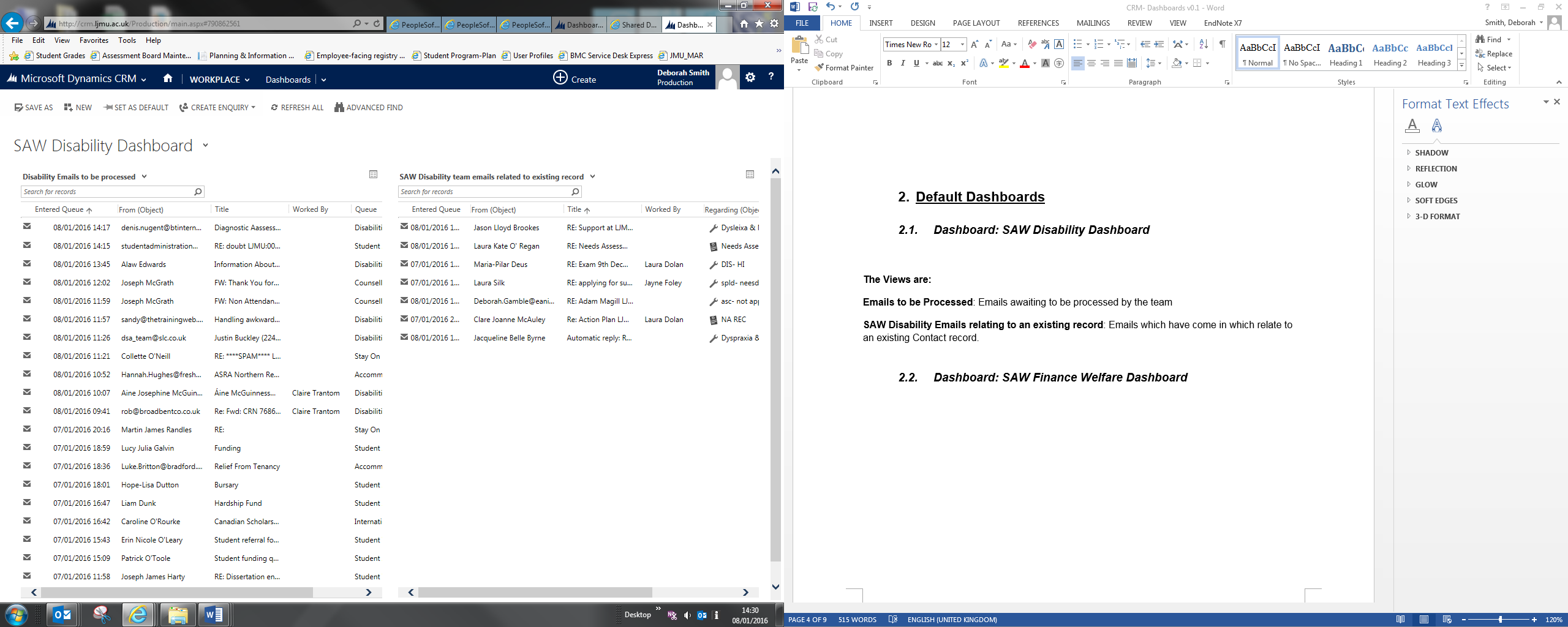
* + 1. **Sorting**

Remember that from within the pop out you can sort or arrange any information by clicking on the headers. You can sort (Ascending, Descending, numerical or alphabetical).

Additionally there is a Search box in the top right where you can search for a student.



1. **Default Dashboards**
   1. ***Dashboard: SAW Disability Dashboard***

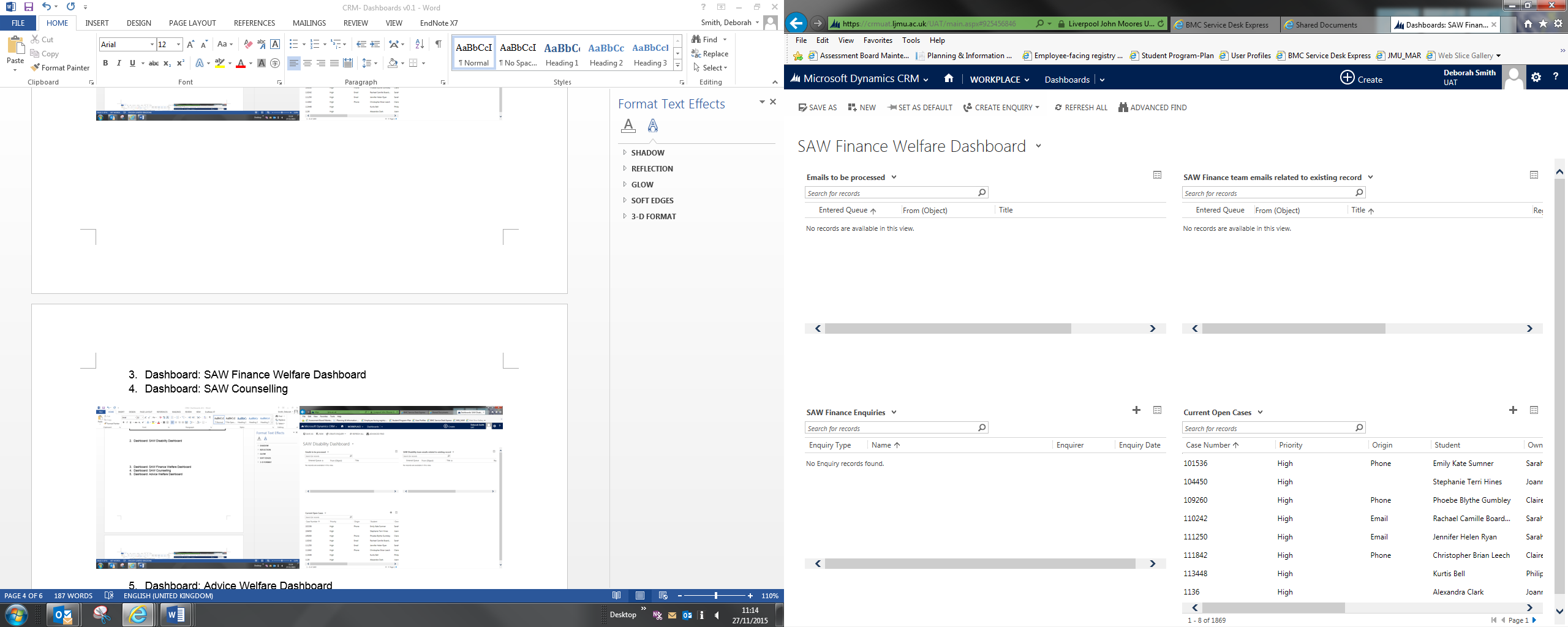


**The Views are:**

**Emails to be Processed**: Emails awaiting to be processed by the team

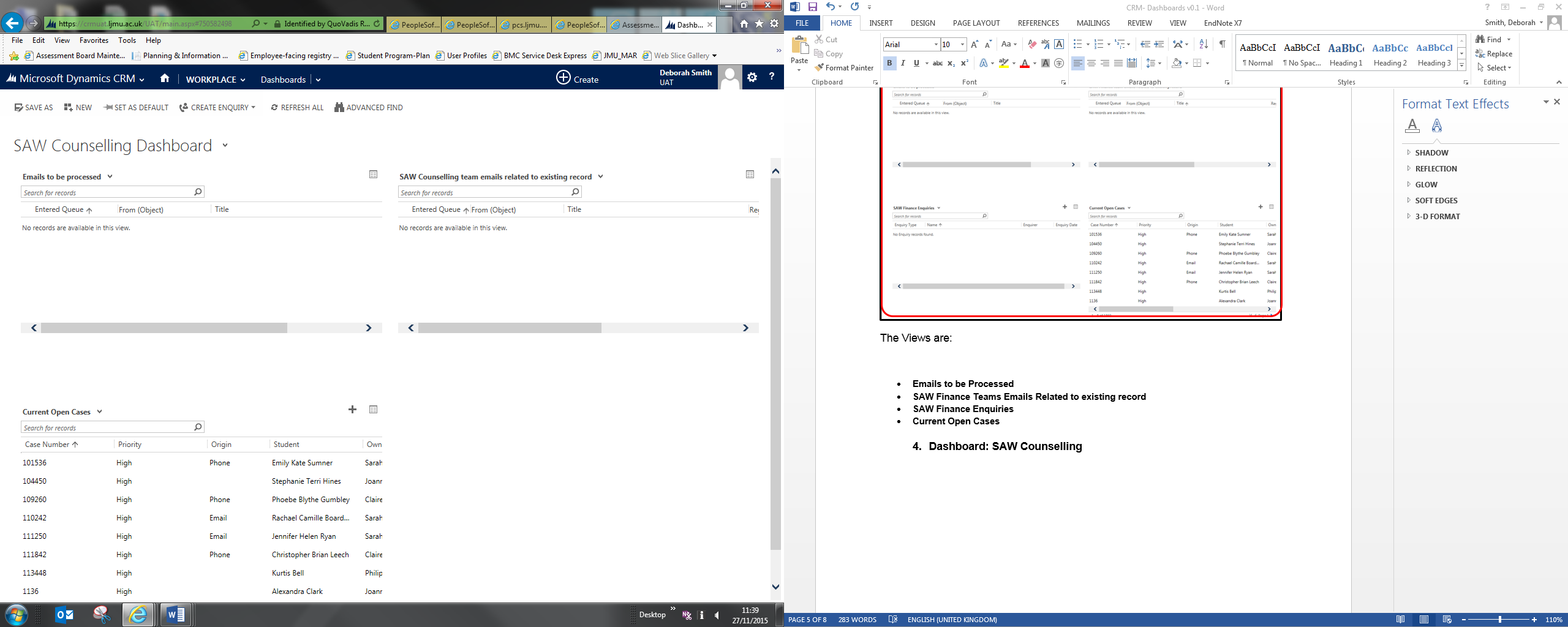
**SAW Disability Emails relating to an existing record**: Emails which have come in which relate to an existing Contact record.

* 1. ***Dashboard: SAW Finance Welfare Dashboard***



The Views are:

* **Emails to be Processed**
* **SAW Finance Teams Emails Related to existing record**
* **SAW Finance Enquiries**
* **Current Open Cases**
  1. ***Dashboard: SAW Counselling***

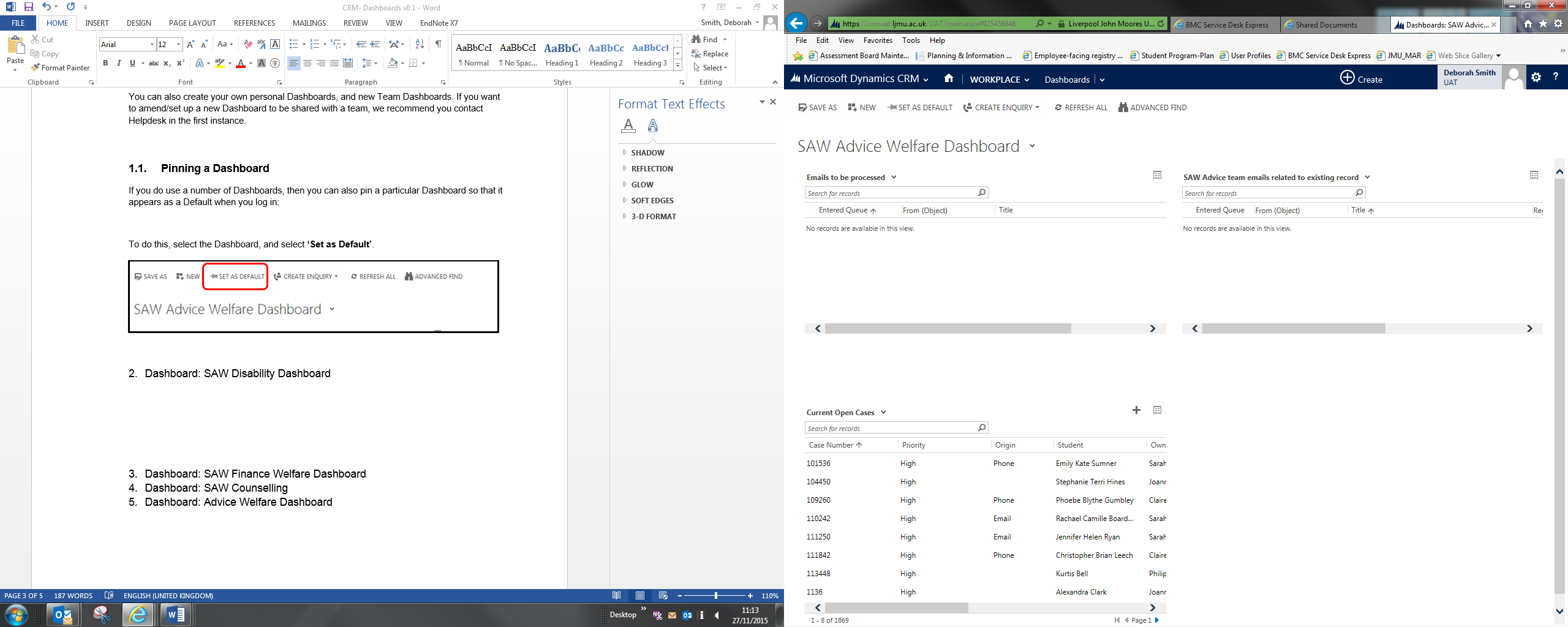


**Emails to be Processed**: Emails awaiting to be processed by the team

**SAW Counselling Emails relating to an existing record**: Emails which have come in which relate to an existing Contact record.

**Current Open Cases**: All Current Open Cases.

* 1. ***Dashboard: Advice Welfare Dashboard***

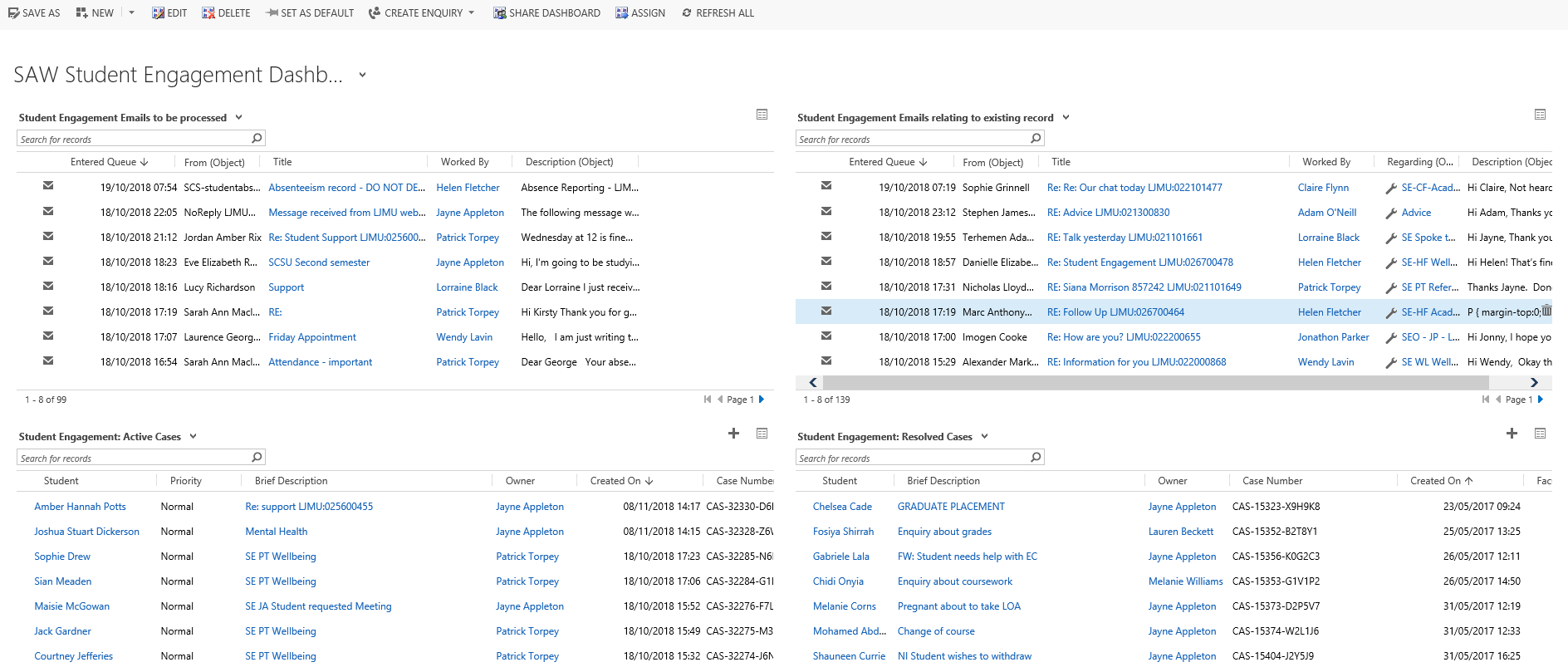


**Emails to be Processed**: Emails awaiting to be processed by the team

**SAW Advice team emails relating to an existing record**: Emails which have come in which relate to an existing Contact record.

**Current Open Cases**: All Current Open Cases.

* 1. ***Student Engagement Dashboard***



**Student Engagement Emails to be processed**: All new emails emailed to queue NOT set regarding a Case.

**Student Engagement Emails relating to existing record**: All emails emailed to queue set regarding a Case

**Student Engagement: Active Cases:** All Active Cases for Student Engagement Team

**Student Engagement: Resolved Cases:** All Resolved Cases owned by Student Engagement Team

Student Engagement Team also have Personal Dashboards which contain the following views:

* Student Engagement Emails: Worked by
* My Sent Emails
* My Active Cases
* My Resolved Cases