



# **Main Menu, Search, Dashboards and Profiles Guide**

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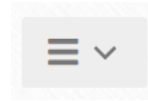
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# Introduction

Campus Café provides multiple ways to access information and perform tasks. The screens shown and tasks allowed are dependent on the user's permission. This guide discusses the main menu navigation, the search box, dashboards and the profile page.

## Main Menu

The three-bar main menu at the top of the screen offers access to all information and tasks for which the user has permission. To access the menu, mouse over the three-bar button at the top, then mouse over the sub menu and, finally, click the task.



You can also search within the menu. To do so, mouse over the three-bar button at the top and in the Search area enter a term to search. The menu will collapse to show only submenus where that phrase occurs.

## Search and Filters

### Search Box

The Search box at the top of the screen allows users to search globally for all people, whether applicants, students, alumni or faculty.



The search box can be configured to search for name and/or ID or just ID. For institutions with a high record count, Campus Café recommends setting the box to only search ID to ensure system performance.

The way the search box behaves is set through MSParm SEARCHBOX. Setting the value to Y will search by Name and/or ID. Setting to N will search by ID.

If the box is set to search for name and/or ID, the search box searches one data field at a time and shows a maximum of 10 search results. In practice, this means you should search on one data point at a time. For example, the search will not understand “James Bond” because the search phrase contains two data elements: first and last name. However, typing in just “James” will show the first 10 individuals with James alphabetically by last name. If there are more than 10 individuals in the system with the first name James and last names that start with A, James Bond will not appear. Instead, try searching “Bond” or using his ID number (e.g. 007).

Once the desired individual appears, click the individual to open the individual’s profile.

## Quick Launchers

Quick launchers allow you to enter an individual's ID number, first name and/or last name and jump to a specific record

- **All People:** all individuals in the database
- **Prospects:** inquiries and applicants
- **Students**
- **Parents**
- **Faculty:** includes faculty and staff
- **Alumni**

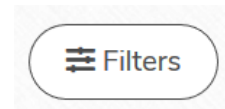
## Finders

Finders allow the return of results based on multiple criteria. For example, you may wish to see all students enrolled in the Spring 2020 term whose home state is Rhode Island.

- **All People:** all individuals in the database
- **Prospects:** inquiries and applicants
- **Activities:** all activities, results limited by tracking permissions
- **Schools:** schools (used on applications and for transfer credit)
- **Students**
- **Parents**
- **Courses:** the course catalog and schedule of courses
- **Majors:** academic programs
- **Financial Aid Disbursement:** Financial aid awards
- **Faculty:** includes faculty and staff
- **Alumni**
- **Activities:** activities associated with alumni
- **Organizations:** Organizations associated alumni or sponsored billing
- **Donations**
- **Gifts**

## Filters

The Filters button at the top of the screen allows you to quickly jump to a specific search/finder screen such as the Search for Courses finder or Financial Aid Disbursements. Filters seen are controlled by security.



# Dashboards

Dashboards allow quick access to high-level data and common screens based on functional role.

For a user to change among dashboards, he or she must belong to a permission group that has a default dashboard set.

## Set Default Dashboard

To set a default dashboard for a group of users, follow the below. This will be the dashboard the user sees upon logging in. For students, we recommend no default dashboard be chosen so the Entry Page text set in Web Adjustable Text Maintenance is used.

1. Navigate to Admin → Permission Maintenance
2. Click the permission group to update
3. Click Edit Group
4. In the Default Dashboard drop down, select the dashboard
5. Click Save
6. Refresh the server cache by running the Admin Servlet by navigating to Admin → Admin Servlet
7. Click reload data

## Control Access to Dashboards

Access to dashboards is governed by permissions.

In each module, remove the N/A to show the dashboard as an option.

Dashboard	Permission Module	Permission
<b>Admissions</b>	Admissions	1224
Restrict results to applicants assigned to counselor who is logged in (set permission to NA)	Admissions	1233
<b>Alumni/Development</b>	Alumni/Development	1226
<b>Faculty (Rosters)</b>	Faculty	1227
<b>Student Services</b>	Registration	1231
Restrict results to students assigned to advisor who is logged in (set permission to NA)	Registration	1234
<b>Student Financials</b>	Student Financials	1230
<b>Financial Aid</b>	Student Financials	1225
<b>Placement</b>	Placement	1229

Please note the Student dashboard (1228) under the My Info module is under development.

If no default dashboard is set for a permission group, the Entry Page text set in Web Adjustable Text Maintenance is used.

## **Adjusting Dashboard Parameters**

The information shown on dashboards may be adjust in Custom Control Maintenance using ProgramId Dashboard.

Parameter 1 controls the number of days in the past the admissions funnel will take into consideration.

Parameter 2 controls the categories for metrics.

- A: activities
- D: documents
- E: emails
- L: labels/miscellaneous
- M: missing documents
- S: sources
- T: transcript requests



## Profiles

The profile screen offers an overview of the individual. Access to various aspects of the screen – referred to here as tabs – are controlled by permissions. A user must log out and log in again for the change to take effect.

The permissions below are for the logged in user to see information for other users.

<b>Tab</b>	<b>Permission(s)</b>
<b>Basic Top-Level Data</b>	
User Last Updated	2007
<b>Summary Contact</b>	1212
Address (Billing)	998
Date of Birth/Age	1024
ID Number	1104
Phone (Home)	997
Phone (Mobile)	1007
Phone (Work)	1003
Photo	1023
Username	1094
<b>Admissions</b>	1213
Application Details & Application	3
Inquiry Details	10
<b>Student Degree</b>	232, 720, 1214
Enrollment History	229, 716
Transcript Button	715
<b>Financial</b>	48, 1215
Billing Statement Button	375, 719
Ledger	73
<b>Financial Aid</b>	1216, 2013
Awards/Disbursements	984
Packaging Info	1142
<b>Alumni/Development</b>	1217
Constituent Type	1068
Gifts	958
<b>Relationships</b>	963, 1218
<b>Housing</b>	1032, 1219
Roommate Info	1050
Roommate Email on Housing	1221
Roommate Cell on Housing	1222
Roommate ID number on Housing	1223
<b>Activities</b>	890, 1199, 1220