BOILERCONNECT FEATURE SPOTLIGHT SERIES

October 2023

Staff Dashboard

PURDUE UNIVERSITY®

BOILER CONNECT

Feature Spotlights

Fall 2023

- August – Sending Messages

- September – Appointment Campaigns

- *October – Staff Dashboard*

- November – Issues Alerts and Managing Cases

- December – Student Lists and Saved Searches

Today

Staff Dashboard

- What, Why, & How

- Widget Deep Dive

- What's Next?

What, Why, & How

Provide at-a-glance, actionable information about your <u>assigned</u> students

Overview of ongoing or recent activity

Customizable

What, Why, & How

6 Possible Widgets

My Students

Select a chart to view a summary about your students including appointment status over the last 90 days and support score. Appropriate permissions may be needed to view some data. Use the toggle to view data in a tabular format or click on the chart elements to view associated students in each category.

My Assigned Students Activity Feed

View activity for your assigned students. Activity includes: newly assigned students, upcoming and past Appointments, new or closed Alerts, new or closed Cases, new Progress Reports, new Notes, new Appointment Summaries. Filter by activity type to include only those you wish.

My Appointment Summaries Pending

View your appointments completed in the past 90 days without an appointment summary. Click on a student name to go to the student profile, or click the "All Recent Appointments" link to manage recent appointments.

What, Why, & How

6 Possible Widgets

My Appointment Campaigns
View all of your active Appointment Campaigns and their associated performance metrics. Click on the campaign name to view details.

My Enrolled Students
Enrollment data on your students for the current term and next term. Select term and click chart for more information.

My Upcoming Appointments
View All Upcoming Appointments

What, Why, & How

Important

All Widgets display based on permissions within BoilerConnect. If you do not see a particular Widget, it is due to the role you have in the platform.
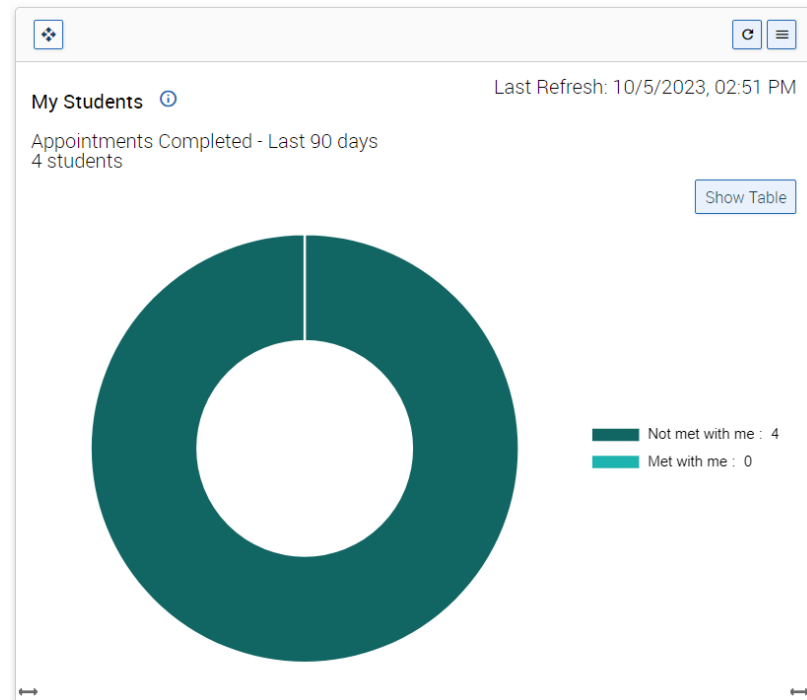
What, Why, & How

Navigate to the **Staff Dashboard** feature by clicking on the speedometer icon.

Widget Deep Dive

My Students

- Displays aggregate appointment information about your assigned students

- You can view your full student list or narrow it down by Student List by clicking the hamburger menu icon ☰

Widget Deep Dive

My Assigned Students Activity Feed

- Displays an aggregate list of activity for your assigned students

- Activities included:

  Alerts Issued

  Case Opened or Closed

  Notes Added

  Check in

  Appointments Scheduled

  New student assigned to you

My Assigned Students Activity Feed ⓘ   Last Refresh: 10/5/2023, 02:52 PM

Search in Results

≡   New Assigned Student EduNav8 Student
    09/12/2023

≡   New Assigned Student EduNav10 Student
    09/12/2023

≡   New Assigned Student EduNav3 Student
    09/12/2023

≡   New Assigned Student EduNav15 Student
    09/12/2023

1 - 33 of 33   100 |< < 1 > >|

Widget Deep Dive

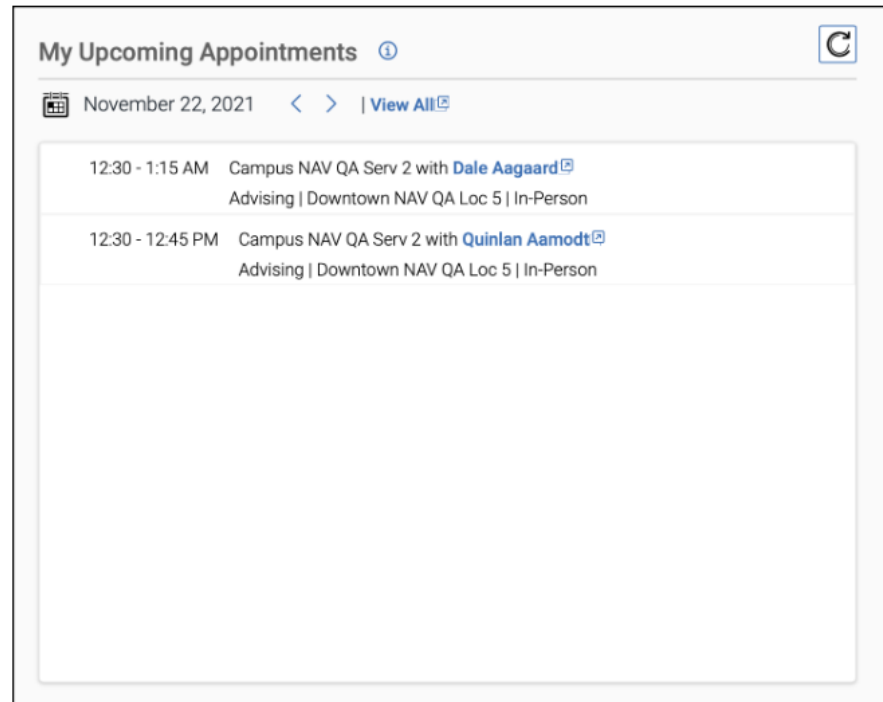## My Assigned Students Activity Feed

Staff can take action on a student if they have permission to send students messages by clicking the hamburger menu in front of a feed entry.
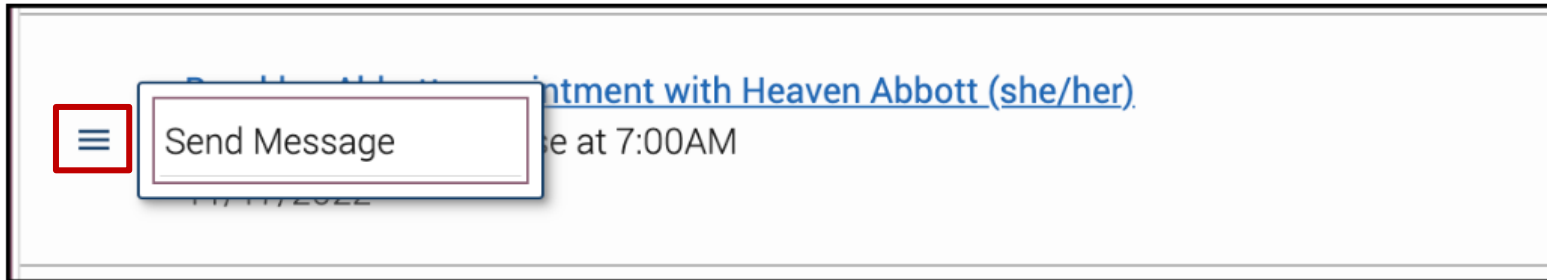
Widget Deep Dive

My Upcoming Appointments

- Displays a daily list of upcoming appointments

- Can change the date or click **View All** to open the Staff Home screen

- Click on the student name to open their profile in a new tab

Widget Deep Dive
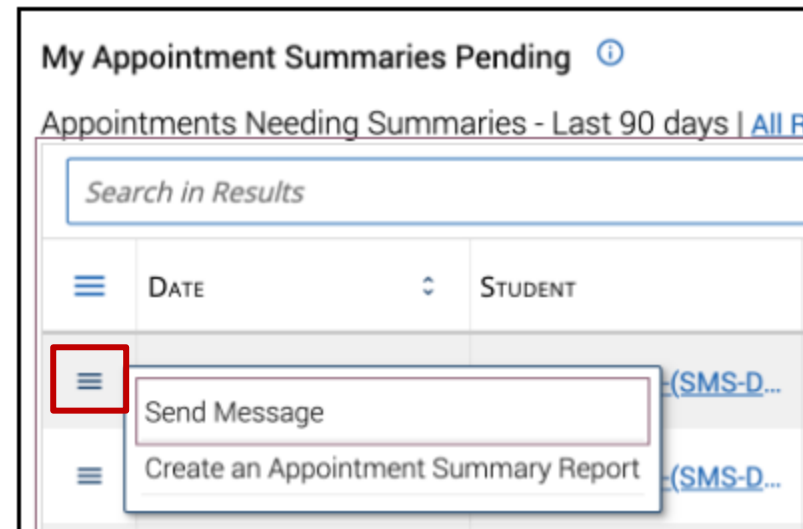
My Appointment Summaries Pending

- Displays appointments that have taken place within the last 90 days that do not have Appointment Summaries

- This list includes all students you have met with, not just your assigned students

- Click on the student name to open their profile in a new tab

Widget Deep Dive
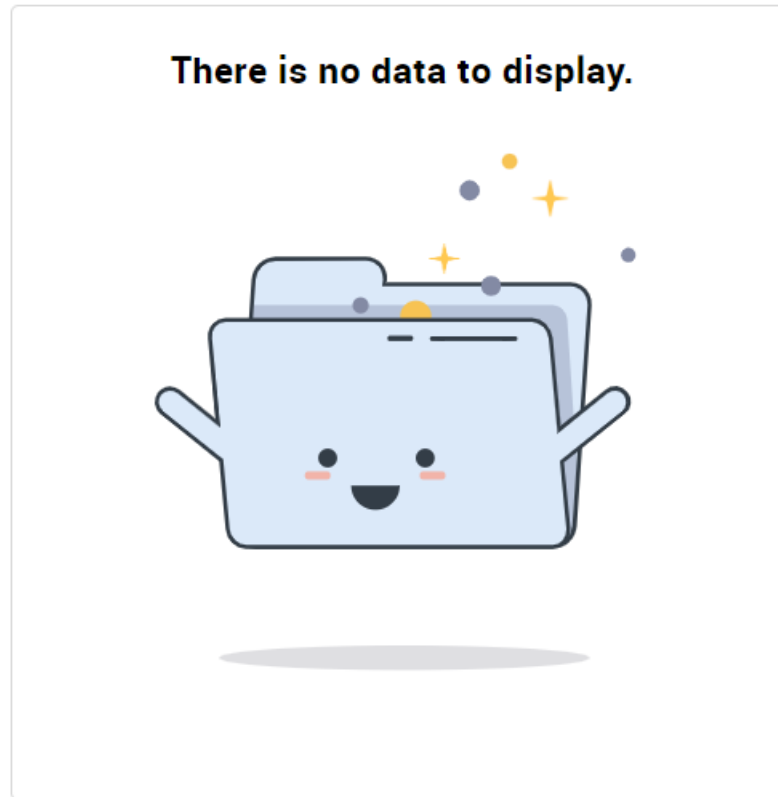
My Appointment Summaries Pending

- Click the hamburger menu icon next to the student name to open the **Actions** menu

- You can send a message or create an appointment summary from there (it is tied to that appointment instance!)
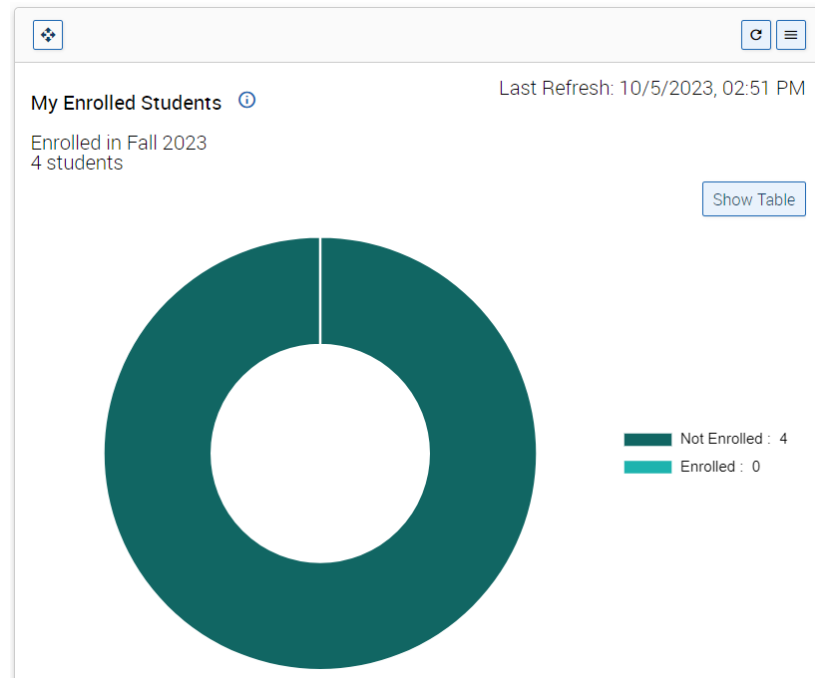
Widget Deep Dive

My Appointment Summaries Pending

Shoot for it to look like this!

There is no data to display.

Widget Deep Dive

My Enrolled Students

- Displays a graph of your assigned students who have enrolled for the selected term and those who haven't

- You can select the term by clicking on the hamburger menu icon ≡

My Enrolled Students ⓘ

Last Refresh: 10/5/2023, 02:51 PM

Enrolled in Fall 2023
4 students

Show Table

Not Enrolled : 4
Enrolled : 0

Widget Deep Dive

My Enrolled Students

▪ Click on a segment of the pie graph to see a list of students in that category

Widget Deep Dive

My Appointment Campaigns

- Displays a list of your active Appointment Campaigns

- Select View All to open the Appointment Campaign feature in BoilerConnect

- Only lists campaigns you have created

My Appointment Campaigns ⓘ

Active Appointment Campaigns | View All

Name	# Students	Appointments	Attendance	Reports
Fall 2021 registration Degree Progress and Planning 03/19/2021 - 06/03/2021	9	11%	0%	0%

What's Next?

- Set the Staff Dashboard as your Default Landing Page so it is the screen you see when you log in

- Use the personalization options on the Staff Dashboard to move or delete widgets to make it most useful for you

- Use this information in tandem with the Advisor Information Dashboard (AID) to get a really good picture as to what is going on with your students

THANK YOU

Join us November 2nd for our next feature spotlight – Issuing Alerts and Managing Cases