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?
Provide at-a-glance, actionable information about your assigned students

Overview of ongoing or recent activity

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

![Activity Feed Screenshot]
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.
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
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
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!)
My Appointment Summaries Pending

Shoot for it to look like this!

There is no data to display.
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

![Graph of enrolled students](image)
Widget Deep Dive

My Enrolled Students

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

**My Enrolled Students**

Not enrolled in Fall 2023
4 students

<table>
<thead>
<tr>
<th>NAME</th>
<th>ID</th>
<th>MAJOR</th>
<th>GPA</th>
</tr>
</thead>
<tbody>
<tr>
<td>EduNav Joe Student</td>
<td>027048142</td>
<td>Economics - BS</td>
<td>0.0000</td>
</tr>
<tr>
<td>EduNav1 Student</td>
<td>023580783</td>
<td>Selling &amp; Sales Management - BS</td>
<td>2.8800</td>
</tr>
<tr>
<td>EduNav15</td>
<td>023914731</td>
<td>Multidisciplinary Engineering -</td>
<td>0.0000</td>
</tr>
</tbody>
</table>
My Appointment Campaigns

- Displays a list of your active Appointment Campaigns
- Only lists campaigns you have created
- Select View All to open the Appointment Campaign feature in BoilerConnect

### My Appointment Campaigns

<table>
<thead>
<tr>
<th>Name</th>
<th># Students</th>
<th>Appointments</th>
<th>Attendance</th>
<th>Reports</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall 2021 registration</td>
<td>9</td>
<td>11%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Degree Progress and Planning</td>
<td>03/19/2021 - 06/03/2021</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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 2\textsuperscript{nd} for our next feature spotlight – Issuing Alerts and Managing Cases