Welcome to the Enterprise Navigation Settings

We Will Begin Shortly



Meet Your Trainer

Sabrina Gilbert Training Team Lead

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Learning Objective

This session will support users in understanding the various Enterprise Navigation features so that admins can modify them with confidence.





Dashboard Messages

Site Navigation Templates





Recommended navigation method Can be shared across the enterprise Managed from any site

Participant				Entity				Reports				
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Ryan Gorka		> + 🛍	Workshop		Social	Adagio,	Participant	6/3/2024	6/3/2024	6/3/2024	Sabrina	



Managed via Manage Dashboard Templates Click the desired template to edit assignments Select desired Sites, Programs and Users

Dashboard Template Assignments			
			Cancel Save
Select the Sites, Programs and Roles you v	wish to assign the Staff Das	hboard to; then select the leve	l of access the selected
If you assign this dashboard template to a	role in a particular site and	program where another templat	te is already assigned, ti
Site: Check All			
ETO Admin HOL			
□ June Admin Foundations			
May 2024 Admin Foundations			
✓ Reports			
✓ XYZ Services			
Program: Check All	,		
🗆 Reports - Alumni Program	A		
🗌 Reports - Intake Program			
Reports - Reporting Practice			
Reports - Youth Services Program			
XY7 Services - Healthy Living			



Dashboard Messages



Dashboard Messages

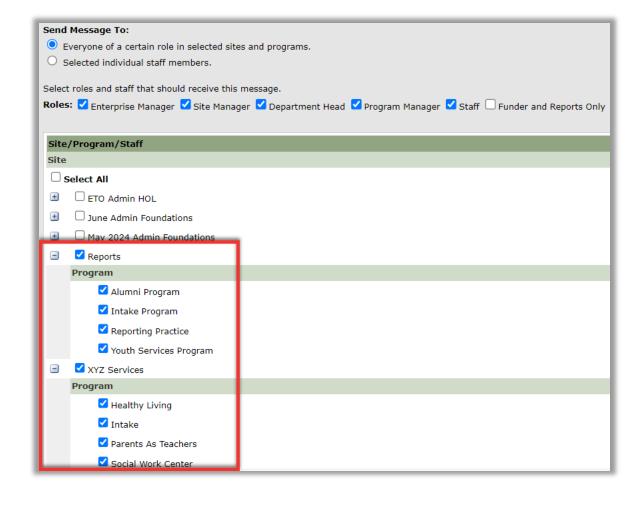
- Can have navigation links
- Can be shared in multiple sites
- Managed from one site

Participant					Entity				Reports				
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Name <u>Naomi Gorka</u> <u>Pam Miles</u>		۲	+ 🖻	Workshop Attendance		Social Work Center	<u>Baccarin,</u> Jennifer Ingrid	Participant	6/3/2024	6/3/2024	6/3/2024	Sabrina Gilbert	
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Dashboard Messages

Managed via Manage Dashboard Messages Click the desired template to edit assignments Select desired Sites, Programs and Users







Customize the left Navigation Bar Applied via Manage Sites Page Enterprise Manager by default

✓ Enterprise	Q Search Te			Within	Participants 🗸 In 🛛 Ado	New Program V
Add New Site	Set Site Navigati	on Template Go Restore Defaults	_	_		
Enterprise Admin Entities	Cabanami	Link	Default	Show	Show	Set all CxRules to
Enterprise Participants	Category	LINK	Rule	using default	using CxRule <mark>s</mark>	Go
Enterprise Reports		Duplicated ParticipantsAdd Demo. by Group	Site Manager Staff	•	0	
Manage Core Conditions		Enterprise EnrollFind Participant (C)	Staff Staff	•	0	
Manage My Enterprise		Find ParticipantView Participant Info	Intake Intake	•	0	
Manage Sites		Add New Participant Add New Family	Staff Staff	•	0	
Manage Workflow		View/Edit Participant	Staff		0	
Templates	Participants	Enroll ParticipantsDismiss Participants	Staff Staff		0	
Set Site Navigation Template		Dismiss Participants by Date	Site Manager	۲	0	
		Enroll Participants (C)	Staff	۲	0	



Turn items on/off Rename fields Apply custom rules

Up to 5 templates

Q Search		3)			Within Participants ~ In A	dd New Program 🗸 SEARCH
Set Site Naviga	ntion ⁻	Template				
Administrative 🗸	Go	Restore Defaults				
	<u> </u>					
			Default	Show	Show	Set all CxRules to
Category		Link	Rule	using default	using CxRules	Go
		Duplicated Participants	Site Manager	0	0	
		Add Demo. by Group	Staff		0	
		Enterprise Enroll	Staff	0	0	
		Find Participant (C)	Staff	0	0	
		Find Participant	Intake	0	0	
		View Participant Info	Intake		O	
		Add New Participant	Staff		0	
		Add New Family	Staff	0	0	
		View/Edit Participant	Staff	0	0	
		Enroll Participants	Staff		•	
Participants		Dismiss Participants	Staff	0	0	
		Dismiss Participants by Date	Site Manager	۲	0	
		Enroll Participants (C)	Staff		\bigcirc	



<u>Steps</u>

- 1. Select Navigation Template
- 2. Check boxes next to sites
- 3. Click Apply Template

Manage Sites				
Add New Site Manage Guest Pro	gram			
Site Navigation Type: Regiona	1			
Check All				
Site Navigation Apply Template	h Apply Template		Site Navigati	on
The state of the s		Site Name	Туре	
		10/20 The Awesome Organization	Administrative	~
		ETO Admin HOL	Administrative	$\mathbf{\vee}$
		Reports	Administrative	~
		Test (Do Not Touch)	Administrative	~
		XYZ Services	Administrative	~



Additional Resources



Additional Training Opportunities

- <u>Knowledge Base</u> How-To Articles (Search Chat or Visit Online)
- Bonterra Academy Free Webinars & Recordings
- <u>Foundations</u> Intensive, Multiday Courses to Cover Admin Basics
- <u>Admin Labs</u> 2 Hour Live Trainings on Specific Capabilities



Build confidence & knowledge in our software!



Customer Support

Reach out to our Customer Support Team with Questions or Concerns.

Weekdays 7am – 7pm CST via chat or through email: eto@bonterratech.com



- Ask questions about functionality covered in this training
- Ask trainer to redo a demo
- Ask real-life application questions
- Or sign off and we will see you in the next training!





Thank you for attending!

We hope to see you in future trainings.

