

Welcome to the Enterprise Navigation Settings

We Will Begin Shortly

Meet Your Trainer

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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.

Agenda

Dashboard Templates

Dashboard Messages

Site Navigation
Templates

Dashboard Templates

Dashboard Templates

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

The dashboard interface is divided into several sections. At the top, there are three main navigation categories: **Participant**, **Entity**, and **Reports**. Each category contains several action icons: Enroll, Add, Add/Edit Family, Record TouchPoint, and Dismiss. Below this, the dashboard is split into three main panels. On the left is a **Dashboard Search** panel with a search input field. In the middle is a **Recent Participants/Entities** panel listing names like Naomi Gorka, Pam Miles, Ryan Gorka, Linda Matthews, and Jennifer Carey. On the right is a **Recent TouchPoints** panel containing a table of activity.

| Take Action | TouchPoint | Dashboard Collection | Program | Name | Subject Type | Status | Date Completed | Date Last Updated | Audit Creation Date | Last Updated By | Attr S N |
|-------------|---------------------|----------------------|--------------------|---------------------------------|--------------|--------|----------------|-------------------|---------------------|-----------------|----------|
| | Workshop Attendance | | Social Work Center | Matthews Jimmy | Participant | | 6/3/2024 | 6/3/2024 | 6/3/2024 | Sabrina Gilbert | |
| | Workshop Attendance | | Social Work Center | Carey Jennifer | Participant | | 6/3/2024 | 6/3/2024 | 6/3/2024 | Sabrina Gilbert | |
| | Workshop Attendance | | Social Work Center | Baccarin Ingrid | Participant | | 6/3/2024 | 6/3/2024 | 6/3/2024 | Sabrina Gilbert | |
| | Workshop Attendance | | Social Work Center | Adagio Jennifer | Participant | | 6/3/2024 | 6/3/2024 | 6/3/2024 | Sabrina Gilbert | |

Dashboard Templates

Managed via Manage Dashboard Templates

Click the desired template to edit assignments

Select desired Sites, Programs and Users

Dashboard Template Assignments

Select the Sites, Programs and Roles you wish to assign the **Staff Dashboard** to; then select the level of access the selected

If you assign this dashboard template to a role in a particular site and program where another template is already assigned, th

Site: Check All

- ETO Admin HOL
- June Admin Foundations
- May 2024 Admin Foundations
- Reports
- XYZ Services

Program: Check All

- Reports - Alumni Program
- Reports - Intake Program
- Reports - Reporting Practice
- Reports - Youth Services Program
- XYZ Services - Healthv Living

Dashboard Messages

Dashboard Messages

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

The dashboard interface is divided into several sections:

- Navigation Bar:** A horizontal bar at the top with three main sections:
 - Participant:** Contains icons for Enroll, Add, and Add/Edit Family.
 - Entity:** Contains icons for Record TouchPoint, Dismiss, and Enroll.
 - Reports:** Contains an icon for Reports.
- Dashboard Search:** A search box with a magnifying glass icon and the text "Dashboard Search".
- Recent Participants/Entities:** A list of recent participants with names: Naomi Gorka, Pam Miles, Ryan Gorka, Linda Matthews, and Jennifer Carey.
- Recent TouchPoints:** A table listing recent touchpoints with columns for Take Action, TouchPoint, Dashboard, Collection, Program, Name, Subject Type, Status, Date Completed, Date Last Updated, Audit Creation Date, Last Updated By, and Attr.

| Take Action | TouchPoint | Dashboard | Collection | Program | Name | Subject Type | Status | Date Completed | Date Last Updated | Audit Creation Date | Last Updated By | Attr |
|-------------|---------------------|-----------|------------|--------------------|---------------------------------|--------------|--------|----------------|-------------------|---------------------|-----------------|------|
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| | Workshop Attendance | | | Social Work Center | Adagio Jennifer | Participant | | 6/3/2024 | 6/3/2024 | 6/3/2024 | Sabrina Gilbert | |

Dashboard Messages

Managed via Manage Dashboard Messages

Click the desired template to edit assignments

Select desired Sites, Programs and Users

Send Message To:

Everyone of a certain role in selected sites and programs.
 Selected individual staff members.

Select roles and staff that should receive this message.

Roles: Enterprise Manager Site Manager Department Head Program Manager Staff Funder and Reports Only

Site/Program/Staff

Site

Select All

ETO Admin HOL

June Admin Foundations

May 2024 Admin Foundations

Reports

Program

Alumni Program

Intake Program

Reporting Practice

Youth Services Program

XYZ Services

Program

Healthy Living

Intake

Parents As Teachers

Social Work Center

Site Navigation Templates

Site Navigation Templates

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

Search Term(s)...

Within Participants In Add New Program SEARCH

Set Site Navigation Template

Administrative Go Restore Defaults

| Category | Link | Default Rule | Show using default | Show using CxRules | Set all CxRules to |
|--------------|---|--------------|----------------------------------|-----------------------|--------------------|
| Participants | <input checked="" type="checkbox"/> Duplicated Participants | Site Manager | <input checked="" type="radio"/> | <input type="radio"/> | --Select-- Go |
| | <input type="checkbox"/> Add Demo. by Group | Staff | <input checked="" type="radio"/> | <input type="radio"/> | |
| | <input checked="" type="checkbox"/> Enterprise Enroll | Staff | <input checked="" type="radio"/> | <input type="radio"/> | |
| | <input type="checkbox"/> Find Participant (C) | Staff | <input checked="" type="radio"/> | <input type="radio"/> | |
| | <input checked="" type="checkbox"/> Find Participant | Intake | <input checked="" type="radio"/> | <input type="radio"/> | |
| | <input type="checkbox"/> View Participant Info | Intake | <input checked="" type="radio"/> | <input type="radio"/> | |
| | <input checked="" type="checkbox"/> Add New Participant | Staff | <input checked="" type="radio"/> | <input type="radio"/> | |
| | <input type="checkbox"/> Add New Family | Staff | <input checked="" type="radio"/> | <input type="radio"/> | |
| | <input checked="" type="checkbox"/> View/Edit Participant | Staff | <input checked="" type="radio"/> | <input type="radio"/> | |
| | <input checked="" type="checkbox"/> Enroll Participants | Staff | <input checked="" type="radio"/> | <input type="radio"/> | |
| | <input checked="" type="checkbox"/> Dismiss Participants | Staff | <input checked="" type="radio"/> | <input type="radio"/> | |
| | <input type="checkbox"/> Dismiss Participants by Date | Site Manager | <input checked="" type="radio"/> | <input type="radio"/> | |
| | <input type="checkbox"/> Enroll Participants (C) | Staff | <input checked="" type="radio"/> | <input type="radio"/> | |

Site Navigation Templates

Turn items on/off

Rename fields

Apply custom rules

Up to 5 templates

Search Term(s)... Within Participants In Add New Program SEARCH

Set Site Navigation Template

Administrative Go Restore Defaults

| Category | Link | Default Rule | Show using default | Show using CxRules | Set all CxRules to |
|--------------|---|--------------|----------------------------------|-----------------------|--------------------|
| Participants | <input checked="" type="checkbox"/> Duplicated Participants | Site Manager | <input checked="" type="radio"/> | <input type="radio"/> | --Select-- Go |
| | <input type="checkbox"/> Add Demo. by Group | Staff | <input checked="" type="radio"/> | <input type="radio"/> | |
| | <input checked="" type="checkbox"/> Enterprise Enroll | Staff | <input checked="" type="radio"/> | <input type="radio"/> | |
| | <input type="checkbox"/> Find Participant (C) | Staff | <input checked="" type="radio"/> | <input type="radio"/> | |
| | <input checked="" type="checkbox"/> Find Participant | Intake | <input checked="" type="radio"/> | <input type="radio"/> | |
| | <input type="checkbox"/> View Participant Info | Intake | <input checked="" type="radio"/> | <input type="radio"/> | |
| | <input checked="" type="checkbox"/> Add New Participant | Staff | <input checked="" type="radio"/> | <input type="radio"/> | |
| | <input type="checkbox"/> Add New Family | Staff | <input checked="" type="radio"/> | <input type="radio"/> | |
| | <input checked="" type="checkbox"/> View/Edit Participant | Staff | <input checked="" type="radio"/> | <input type="radio"/> | |
| | <input checked="" type="checkbox"/> Enroll Participants | Staff | <input checked="" type="radio"/> | <input type="radio"/> | |
| | <input checked="" type="checkbox"/> Dismiss Participants | Staff | <input checked="" type="radio"/> | <input type="radio"/> | |
| | <input type="checkbox"/> Dismiss Participants by Date | Site Manager | <input checked="" type="radio"/> | <input type="radio"/> | |
| | <input type="checkbox"/> Enroll Participants (C) | Staff | <input checked="" type="radio"/> | <input type="radio"/> | |

Site Navigation Templates

Steps

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

The screenshot shows the 'Manage Sites' interface. At the top, there are two buttons: 'Add New Site' and 'Manage Guest Program'. Below them is a 'Site Navigation Type' dropdown menu set to 'Regional', with a blue circle '1' next to it. There are two 'Check All' checkboxes. Below these are two 'Apply Template' buttons, with a blue circle '3' next to the first one. A table of sites is displayed with columns for 'Site Name' and 'Site Navigation Type'. The table has five rows. The first row is '10/20 The Awesome Organization' with 'Administrative' type. The second row is 'ETO Admin HOL' with 'Administrative' type. The third row is 'Reports' with 'Administrative' type. The fourth row is 'Test (Do Not Touch)' with 'Administrative' type. The fifth row is 'XYZ Services' with 'Administrative' type. A blue circle '2' is next to the checkboxes for the 'Reports' and 'XYZ Services' rows, with a red bracket grouping them.

| Site Navigation | Enterprise Entity Search | Apply Template | Site Name | Site Navigation Type |
|-------------------------------------|--------------------------|----------------|--------------------------------|----------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | | 10/20 The Awesome Organization | Administrative |
| <input type="checkbox"/> | <input type="checkbox"/> | | ETO Admin HOL | Administrative |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | | Reports | Administrative |
| <input type="checkbox"/> | <input type="checkbox"/> | | Test (Do Not Touch) | Administrative |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | | XYZ Services | Administrative |

Additional Resources

Additional Training Opportunities

- [Knowledge Base](#) – How-To Articles (Search Chat or Visit Online)
- [Bonterra Academy](#) – Free Webinars & Recordings
- [Foundations](#) – Intensive, Multiday Courses to Cover Admin Basics
- [Admin Labs](#) – 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

Q & A

- 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.