

# How can YOUR CHURCH use the Dashboard?



## Overview

The new Dashboard is a tool for helping you monitoring and exporting your requests. Your data can be filtered and users will only see the requests in the groups they are allowed to access.

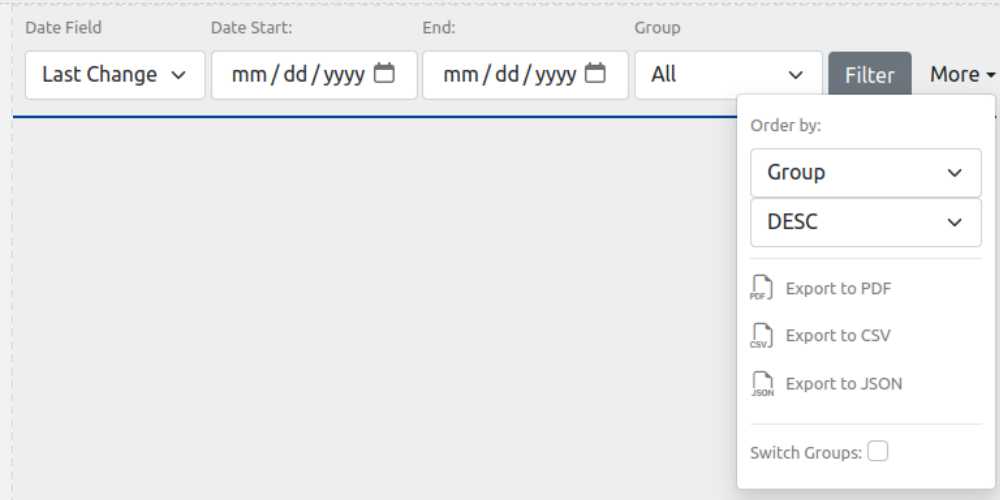
The image is listing all "All" SafeguardFromAbuse requests:

*(\* This is testing data with testing groups.*

## Filters

You can filter your requests, by changing the options at the top of the list.

Filters you can use:



The screenshot shows a filter interface with the following elements:

- Date Field:** A dropdown menu currently set to "Last Change".
- Date Start:** A text input field with the placeholder "mm/dd/yyyy" and a calendar icon.
- End:** A text input field with the placeholder "mm/dd/yyyy" and a calendar icon.
- Group:** A dropdown menu currently set to "All".
- Filter:** A dark button to apply the filters.
- More:** A dropdown arrow for additional options.

A "More" dropdown menu is open, showing the following options:

- Order by:**
  - Group (dropdown arrow)
  - DESC (dropdown arrow)
- Export to PDF (with PDF icon)
- Export to CSV (with CSV icon)
- Export to JSON (with JSON icon)
- Switch Groups:

#### Filters details:

- 1 - **Date Field:** You can filter by date using multiple possible fields (*Synced, Registered, Completed and Last Change*)
- 2 - **Date Start:** Here you can set a start date to filter your requests (*The date format will depend on your browser configuration*)
- 3 - **End:** You can set an end date or erase it by clicking at "backspace"
- 4 - **Group:** You can use any filter you have access, to filter your requests

#### Order by fields:

- ID:** This is the ID from your own church management software
- First/Last Name:** Name of the member
- Group:** Requests from a group (*ordered by the group ID, not the title*)
- Date Synced/Registered/Completed/Last Change:** Shows the date for selected status
- ASC/DESC:** Choose if you want to filter it ASCendent or DESCendent

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## ▢ Statuses and Colors

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Soon

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## ▢ Links

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After you send the REST Key to SecureSearch and get a confirmation that the plugins were configured, please follow these steps:

You can access any member in your own solution, by clicking at the left link (*member ID*)

And to see the member details, just click at the link on the right side (*e.g.: other requests, SafeguardFromAbuse and other data*)


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## Exporting Data

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To export a "Dashboard View", all you have to do is to click at some of the available exporting formats. You can find them at "Filters" > "More".

### Available formats:

 Export to PDF

 Export to CSV

 Export to JSON

### Details:

- 1 - **PDF**: You can export the whole dashboard view as a PDF (*it is a special render from the webpage*), which is very similar to what you see in the browser, including links to your software and for the SecureSearch APP
- 2 - **CSV**: This format is very useful for using your data in your spreadsheets, all organized by columns and rows, including headers
- 3 - **JSON**: This format will create an object from your data, which can be used by most modern softwares/languages