

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" BC:





Background Check Requests

Date Field: Last Change ▾ Date Start: mm / dd / yyyy 📅 End: mm / dd / yyyy 📅 Group: All ▾ Status: All Completed ▾ Filter More ▾

Background Check Requests

471 requests were found with the status **ALL COMPLETED** (listed by [Date Last Change DESC](#))

ID	First Name	Last	Email	ProfNo	Group	#	Status
278614	Jonathan	*****	jon*****@gmail.com	2023032955312583	Main	0	Clear View Profile 2 Notes Status
119694	Brittany	*****	bri*****@gmail.com	2023032835817047	Main	1	Clear View Profile 2 Notes Status
146866	Breanna	*****	bre*****@gmail.com	2023031661840867	Main	0	Clear View Profile 2 Notes Status
28570	Katie	*****	kat*****@gmail.com	2023040562548807	Main	1	Clear View Profile 4 Notes Status
13582	Layla	*****	smi*****@gmail.com	2023040433674337	Main	0	Clear View Profile 2 Notes Status
4013	Nora	*****	nor*****@gmail.com	2023032345620983	Main	1	Clear View Profile Notes Status
10182	Steven	*****	ste*****@hotmail.com	2023040443827153	Main	6	Clear View Profile Notes Status
81238	Tori	*****	tor*****@hotmail.com	2023041350325440	Main	3	Clear View Profile Notes Status
69815	Vanessa	*****	vk*****@gmail.com	2023041350045880	Main	0	Clear View Profile Notes Status
205127	Laurie	*****	lba*****@gmail.com	2023040532097770	Main	0	Clear View Profile Notes Status

Filters

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

Filters you can use:

Date Field: Last Change ▾ Date Start: mm/dd/yyyy 📅 End: mm/dd/yyyy 📅 Group: All ▾ Status: All Completed ▾ Filter More ▾

	Group	#	Status
55312583	Main	0	Cleared
35817047	Main	1	Cleared
61840867	Main	0	Cleared
62548807	Main	1	Cleared

Member ID

New Request

Order by:

Date Last Change ▾

DESC ▾

PDF Export to PDF

CSV Export to CSV

JSON Export to JSON

Switch Groups:

Filters details:

- 1 - **Date Field:** You can filter by date using multiple possible fields (*Added, Last Change and Requested*)
 - 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
 - 5 - **Status:** Here you can select any possible status, or choose them all. The possible statuses are: Waiting, Requested, InProgress, Review, Completed, Cancelled and Error
 - 6 - **Member ID:** You can type any member ID to only see the requests from that member
- Completed Status:** Completed status can be displayed as regular (*green color*), consider (*pink color*) and error (*red color*). If you select "Completed", you will see them all.

Order by fields:

- ID:** This is the ID from your own church management software
- First/Last Name:** Name of the member
- ProfNo:** Number automatically created for every Background Check request
- Group:** Requests from a group (*ordered by the group ID, not the title*)

Date Added/Requested/Last Change: Shows when a request was submitted, filled by the member and completed

Status: All possible status a request can have (draft, requested, inprogress, completed (consider or error) and cancelled)

ASC/DESC: Choose if you want to filter it ASCendent or DESCendent

▢ Statuses and Colors

All requestes will be divided into groups and colors.

Details:

CLEAR: This status means that a BC request was completed without any flag

Clear

CONSIDER: This status means a BC was completed, but has a "CONSIDER" flag, which means it must be reviewed.

Consider

INPROGRESS: This request was submitted by the church, completed by the member and waiting for the final status

InProgress

REQUESTED: This request was submitted by the church but it still pending on the member side

Requested

DRAFT: This means a requested was opened but never submitted

Draft

CANCELLED: This means the request was cancelled

Cancelled

ERROR: This means the request was completed but could not be updated in the church side. Once the error status is cleared, it can change to COMPLETED (*green*) or review (*pink*) if with any flag

Error

Links

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*)

278614	← Jonathan	*****	jon****@gmail.com	2023032955312583	Main	<ul style="list-style-type: none">• Added on: 3/29/2023, 2:07:55 PM• Requested on: 3/29/2023, 2:21:55 PM• Last Change: 7/25/2023, 7:49:04 AM	0	Clear	View Profile 2 Notes Status
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On the right side you will find a link to see all the details from a member (*View Profile*), a link to the notes in that request (*Notes*) and another link to change it's final Status (*switch from CONSIDER to CLEAR and vice-versa - only available for usertype MANAGER and up*)

278614	Jonathan	*****	jon****@gmail.com	2023032955312583	Main	<ul style="list-style-type: none">• Added on: 3/29/2023, 2:07:55 PM• Requested on: 3/29/2023, 2:21:55 PM• Last Change: 7/25/2023, 7:49:04 AM	0	Clear	→ View Profile 2 Notes Status
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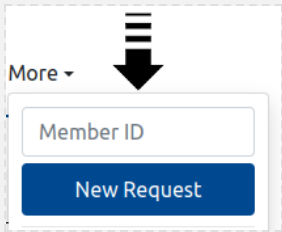
Requesting a new Background Check

For requesting a new Background Check from the Dashboard, follow these steps:

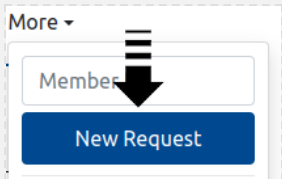
1 - Click at "More", on the right side of the filters

Date Field	Date Start:	End:	Group	Status	
Last Change ▾	mm/dd/yyyy 📅	mm/dd/yyyy 📅	All ▾	Completed ▾	More ▾

2 - Enter a valid member ID






3 - Click at "New Request"



Exporting Data

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