

## Creating Custom Dashboards:

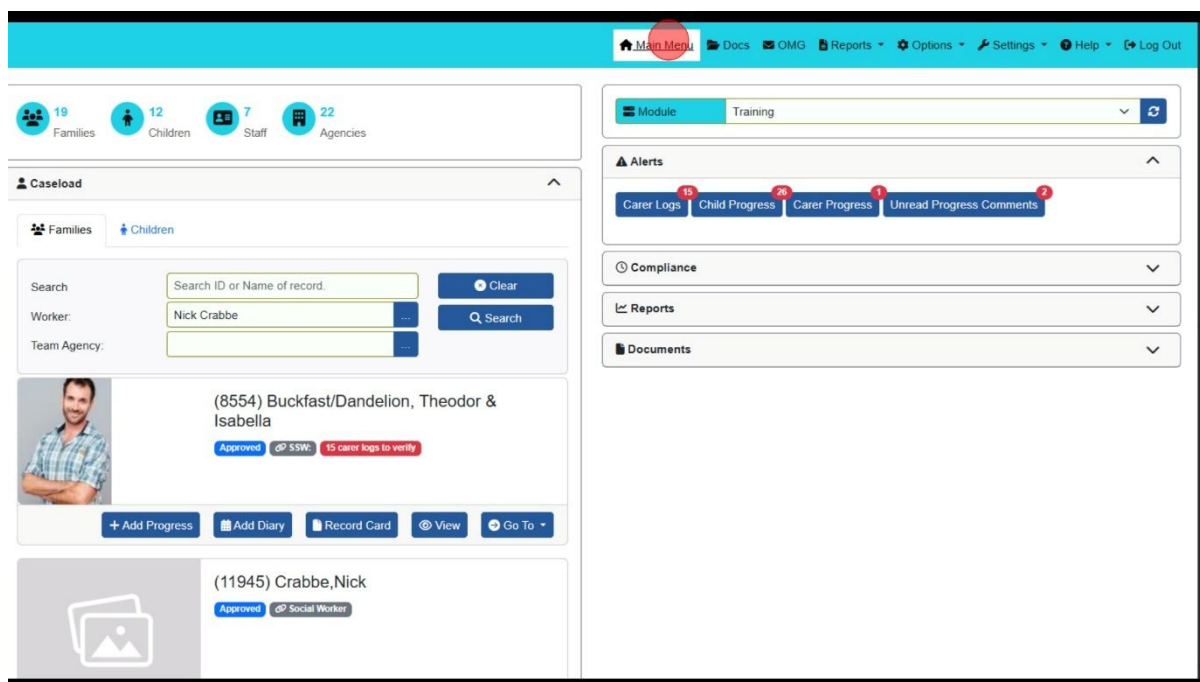
CHARMS version 11.6.3 allows users to create their own custom dashboards on the Main Menu page by selecting from various available widgets, which can be set to appear in the left or right columns of the dashboard window. To create your own custom dashboard....

### Step 1

Visit <https://bsnbluesky.mycharms.uk/HomeMenu/Home>


### Step 2


Click the " Main Menu" button




### Step 3

Click "My Account" link






Charms | Main Menu



Nick Crabbe  
[My Account](#)



[Main Menu](#)  
[Blue Sky Learning Website](#)  
[Introduce a Friend](#)  
[Blue Sky CHARMS carer](#)

 19 Families
  12 Children
  7 Staff
  22 Agencies

Caseload

Families
Children

Search

Search ID or Name of record.

Worker:


Nick Crabbe

Team Agency:

## Step 4

Click "Add Custom Dashboard" link

Main Menu
Docs
OMG
Reports
Options
Settings
Help
Log Out



[Upload Photo](#)  
[Go To Staff Record](#)

DOB: 23/12/1970  
Description: Supervising Social Worker  
Start: 10/09/2007  
Address 1: 2 Warren Close  
Address 2: Shirley Warren  
Address 3:  
Town: Southampton  
County: Hants  
Postcode: SO16 6BJ  
Phone: 07500960033  
Mobile: 07741 312 799  
Email: nicholas.crabbe@yahoo.co.uk  
[Update Details](#)

[Update Email Address](#)
[Change Password](#)

User Preferences

☐ Dyslexic View

Alert Potential Links

Enabled: ☒ Within number of days: 10
[Edit](#)

Dashboard Settings
[Add Custom Dashboard](#)

No custom dashboards setup.

Record Locks

No record locks!

Login History

Annual Leave

Entitlement	Taken	Pending	Remaining
0	0	0	0

[Request Annual Leave](#)

## Step 5

Click the input field and give the dashboard a name. Here we are using "Recruitment" as the name.

My Account | Nick Crabbe

bsn social care

Annual Leave

Entitlement 0

Tak 0

Upload Photo

Go To Staff Record

Change Password

days: 10

Add Cus Dashboard

work record

Recruitment

Active: ☒

Name	Column	Order	Visible
MyCaseload	Left Column	0	<input type="checkbox"/>
Alerts	Left Column	0	<input type="checkbox"/>
ActionMonitor	Left Column	0	<input type="checkbox"/>
Reports	Left Column	0	<input type="checkbox"/>
Documents	Left Column	0	<input type="checkbox"/>
Recruitment	Left Column	0	<input type="checkbox"/>
NoticeBoard	Left Column	0	<input type="checkbox"/>

Step 6

Click "Left Column Right Column"

Nick Crabbe

bsn social care

Annual Leave

Entitlement 0

Tak 0

Upload Photo

Go To Staff Record

Change Password

days: 10

Add Cus Dashboard

work record

Recruitment

Active: ☒

Name	Column	Order	Visible
MyCaseload	Left Column	0	<input type="checkbox"/>
Alerts	Left Column	0	<input type="checkbox"/>
ActionMonitor	Left Column	0	<input type="checkbox"/>
Reports	Left Column	0	<input type="checkbox"/>
Documents	Left Column	0	<input type="checkbox"/>
Recruitment	Left Column	0	<input type="checkbox"/>
NoticeBoard	Left Column	0	<input type="checkbox"/>

Step 7

Click input field

be

Main Menu

Docs

OMG

Reports

Options

Settings

Help

Log

Upload Photo

Go To Staff Record

Annual Leave

Entitlement

Tak

0

0

Add Dashboard Setting

Creating a new custom dashboard.

You can select which widgets are present on the dashboard by making them visible. You must then configure the column (left or right) that you want the widget to show in and the order.

Name:

Recruitment

Active:

☒

Name	Column	Order	Visible
MyCaseload	Left Column	0	<input type="checkbox"/>
Alerts	Left Column	0	<input type="checkbox"/>
ActionMonitor	Left Column	0	<input type="checkbox"/>
Reports	Left Column	0	<input type="checkbox"/>
Documents	Left Column	0	<input type="checkbox"/>
Recruitment	Right Column	0	<input type="checkbox"/>
NoticeBoard	Left Column	0	<input type="checkbox"/>

days: 10

Edit

Add Custom Dashboard

Step 8

Click input field

be

Main Menu

Docs

OMG

Reports

Options

Settings

Help

Log Out

Upload Photo

Go To Staff Record

Annual Leave

Entitlement

Tak

0

0

Add Dashboard Setting

Creating a new custom dashboard.

You can select which widgets are present on the dashboard by making them visible. You must then configure the column (left or right) that you want the widget to show in and the order.

Name:

Recruitment

Active:

☒

Name	Column	Order	Visible
MyCaseload	Left Column	0	<input type="checkbox"/>
Alerts	Left Column	0	<input type="checkbox"/>
ActionMonitor	Left Column	0	<input type="checkbox"/>
Reports	Left Column	0	<input type="checkbox"/>
Documents	Left Column	0	<input type="checkbox"/>
Recruitment	Right Column	1	<input type="checkbox"/>
NoticeBoard	Left Column	0	<input type="checkbox"/>

days: 10

Edit

Add Custom Dashboard

Step 9

Click input field

bbbe

Main Menu

Docs

OMG

Reports

Options

Settings

Help

Log Out

Upload Photo

Go To Staff Record

Annual Leave

Entitlement

0

Tak

0

Add Dashboard Setting

×

Creating a new custom dashboard.

You can select which widgets are present on the dashboard by making them visible. You must then configure the column (left or right) that you want the widget to show in and the order.

Name:

Recruitment

Active:

☒

Name	Column	Order	Visible
MyCaseload	Left Column	0	<input type="checkbox"/>
Alerts	Right Column	2	<input checked="" type="checkbox"/>
ActionMonitor	Left Column	0	<input type="checkbox"/>
Reports	Right Column	1	<input checked="" type="checkbox"/>
Documents	Left Column	0	<input type="checkbox"/>
Recruitment	Right Column	1	<input checked="" type="checkbox"/>
NoticeBoard	Right Column	0	<input checked="" type="checkbox"/>

days: 10

Edit

Add Custom Dashboard

Step 10

Click "Save" link

bbbe

Main Menu

Docs

OMG

Reports

Options

Settings

Help

Log Out

Upload Photo

Go To Staff Record

Annual Leave

Entitlement

0

Tak

0

Add Dashboard Setting

×

Creating a new custom dashboard.

You can select which widgets are present on the dashboard by making them visible. You must then configure the column (left or right) that you want the widget to show in and the order.

Name:

Recruitment

Active:

☒

Name	Column	Order	Visible
MyCaseload	Left Column	0	<input type="checkbox"/>
Alerts	Right Column	2	<input checked="" type="checkbox"/>
ActionMonitor	Left Column	0	<input type="checkbox"/>
Reports	Right Column	1	<input checked="" type="checkbox"/>
Documents	Left Column	0	<input type="checkbox"/>
Recruitment	Right Column	1	<input checked="" type="checkbox"/>
NoticeBoard	Right Column	3	<input checked="" type="checkbox"/>

Close

Save

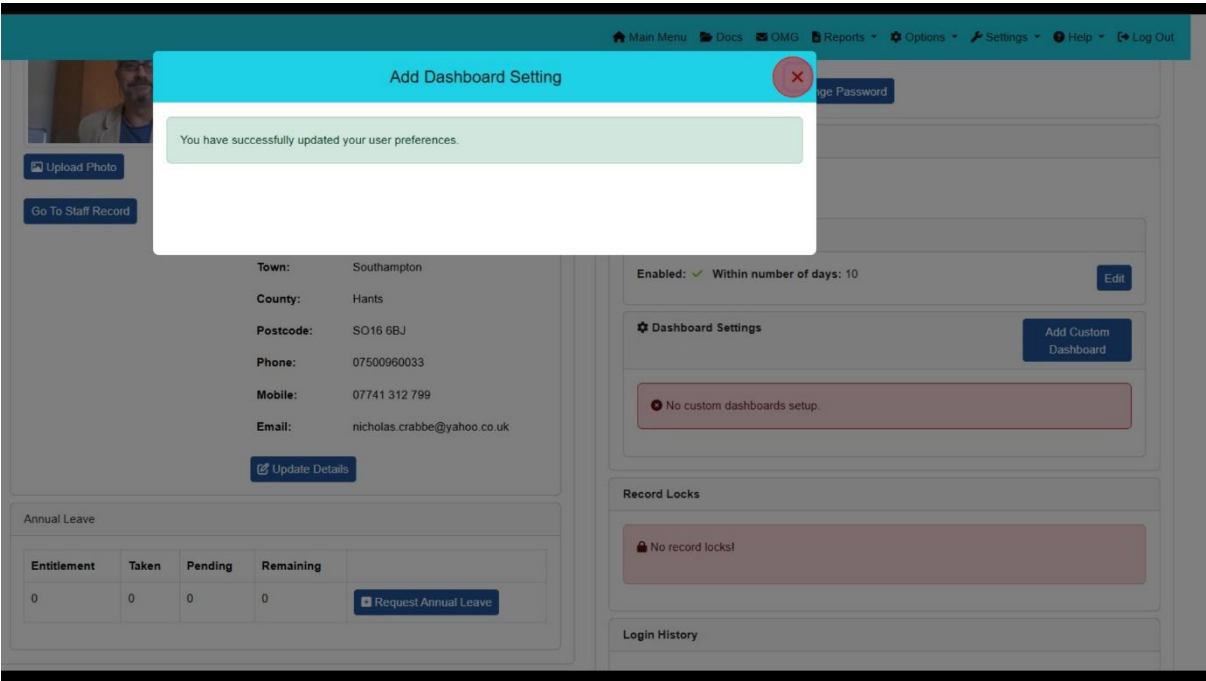
days: 10

Edit

Add Custom Dashboard

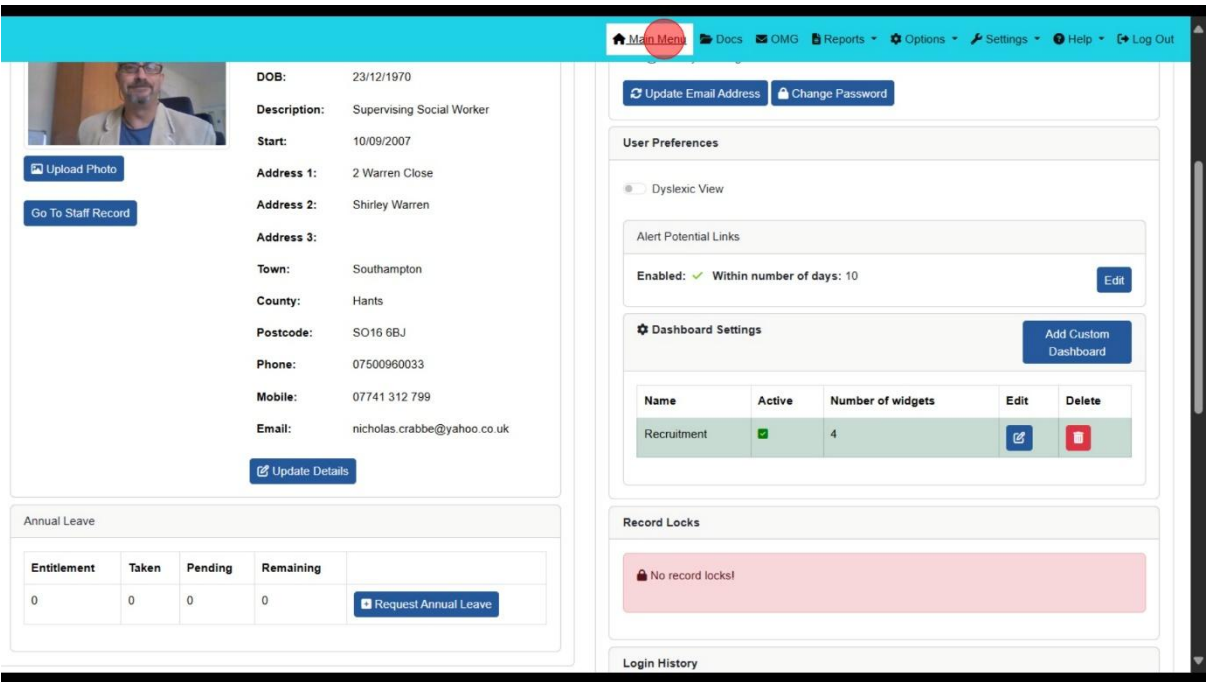
Step 11

Click button



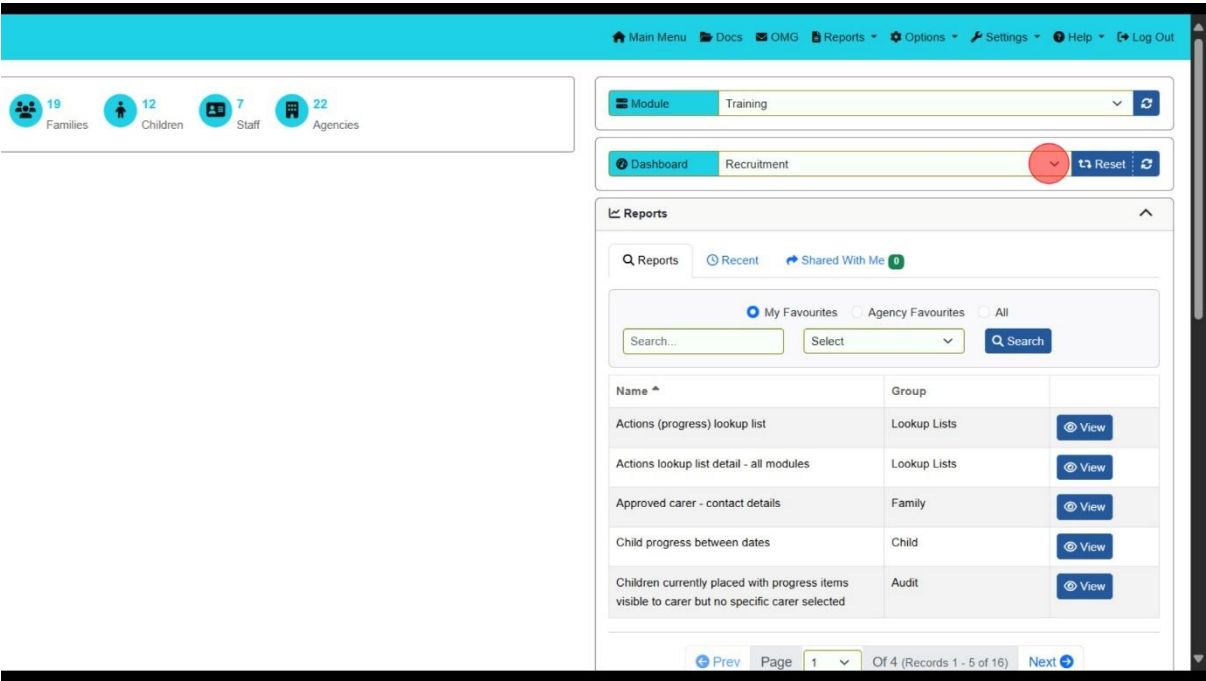
Step 12

Click " Main Menu" link



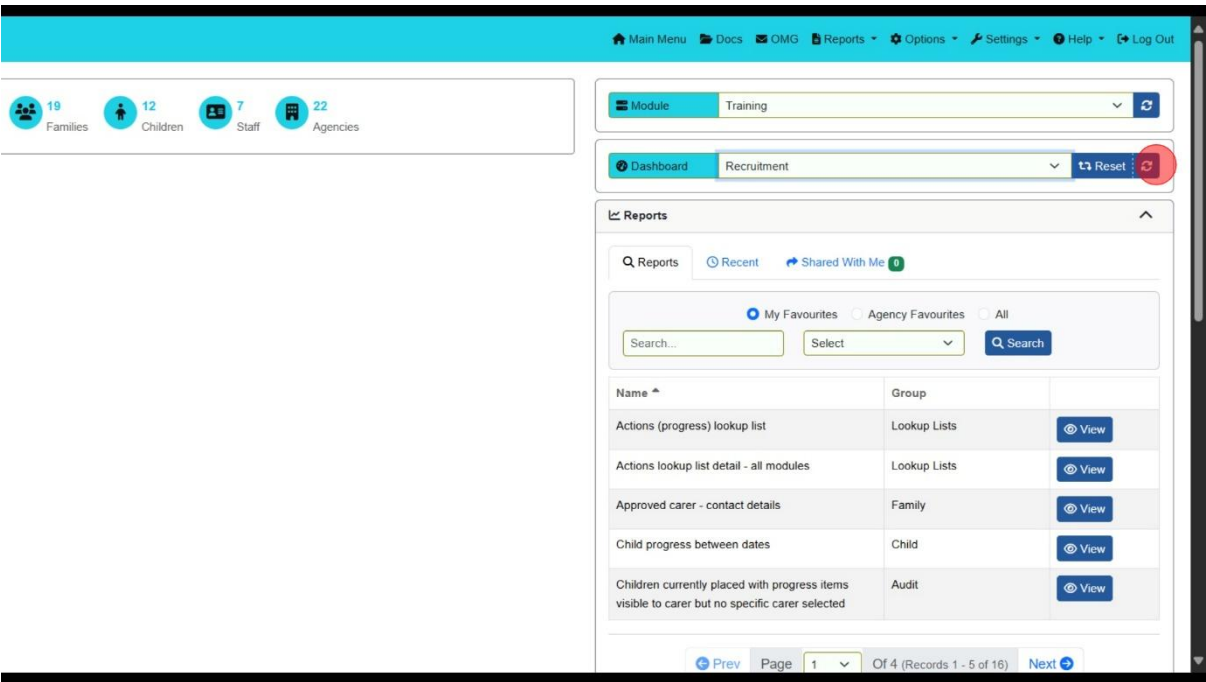
Step 13

Click "Recruitment"



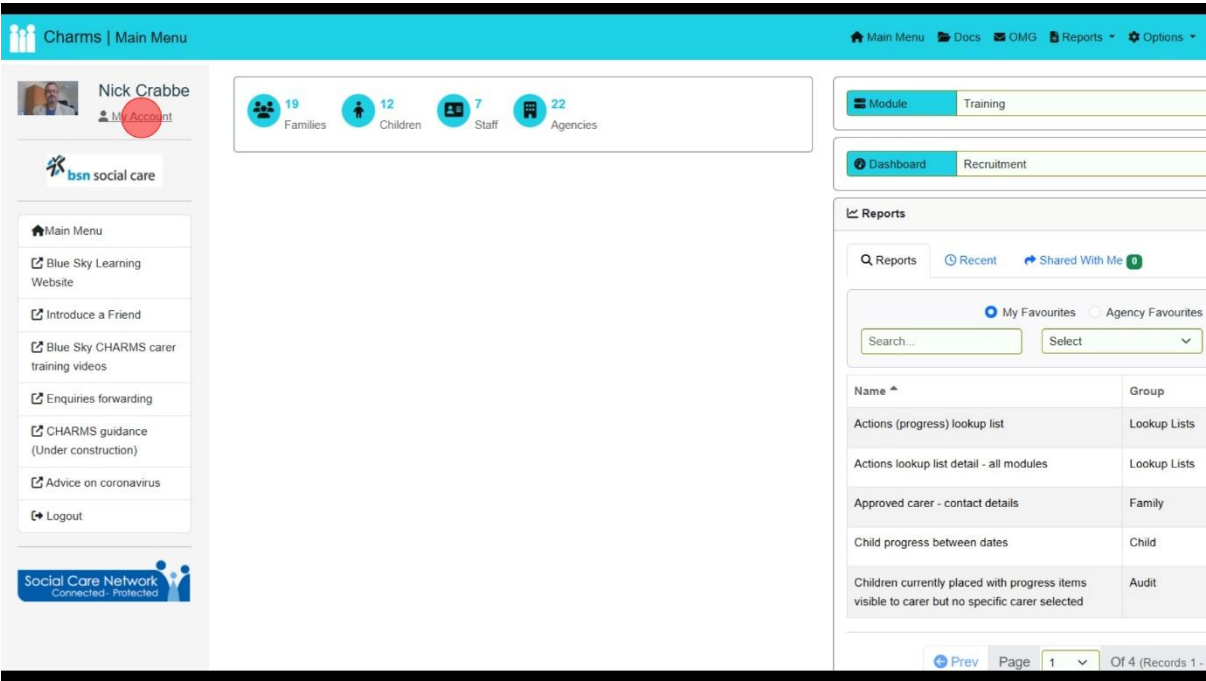
Step 14

Click button



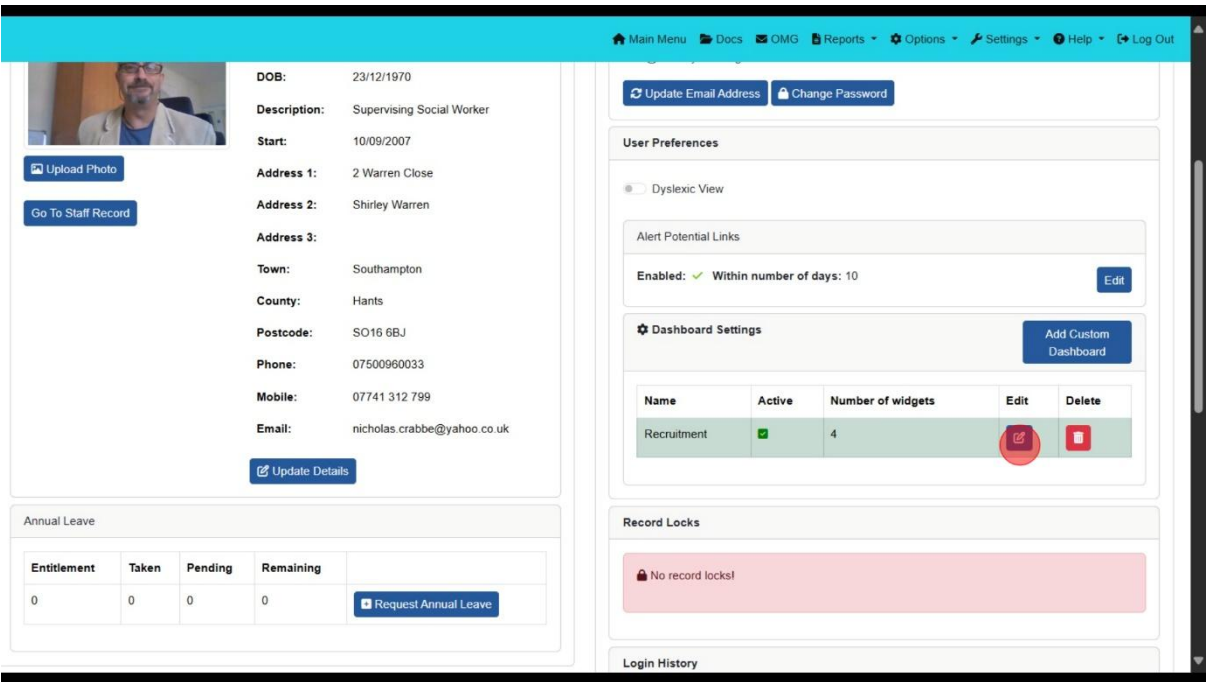
Step 15

Click " My Account" link



Step 16

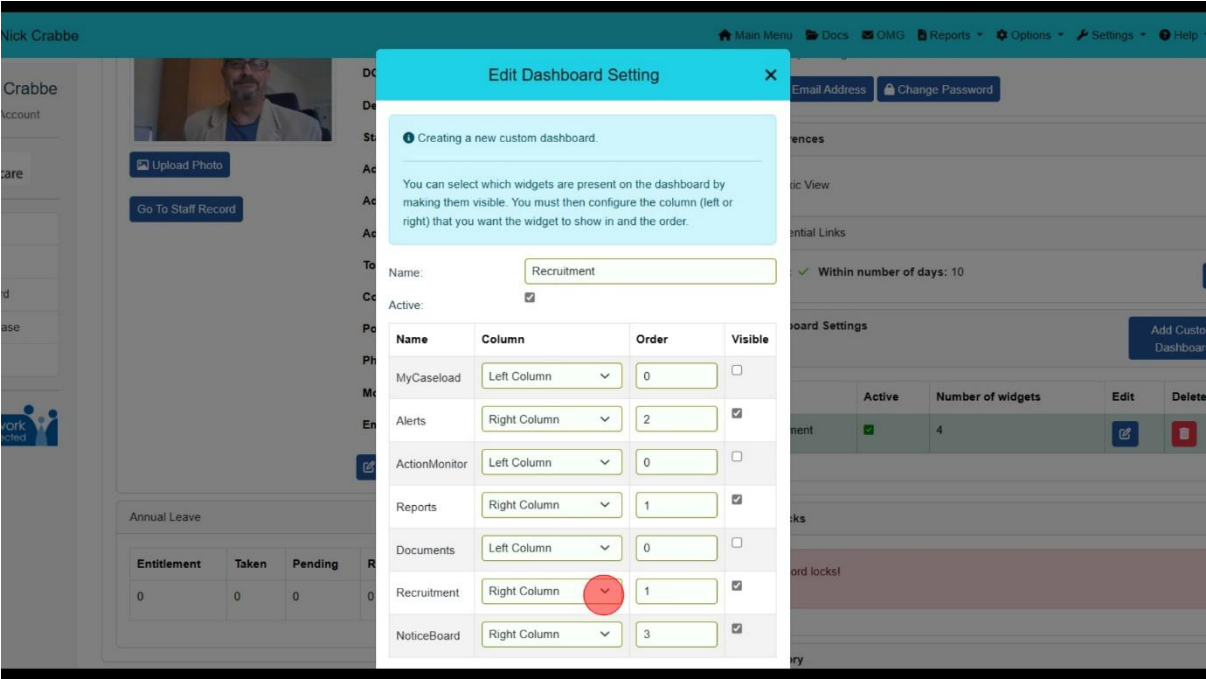
Click link





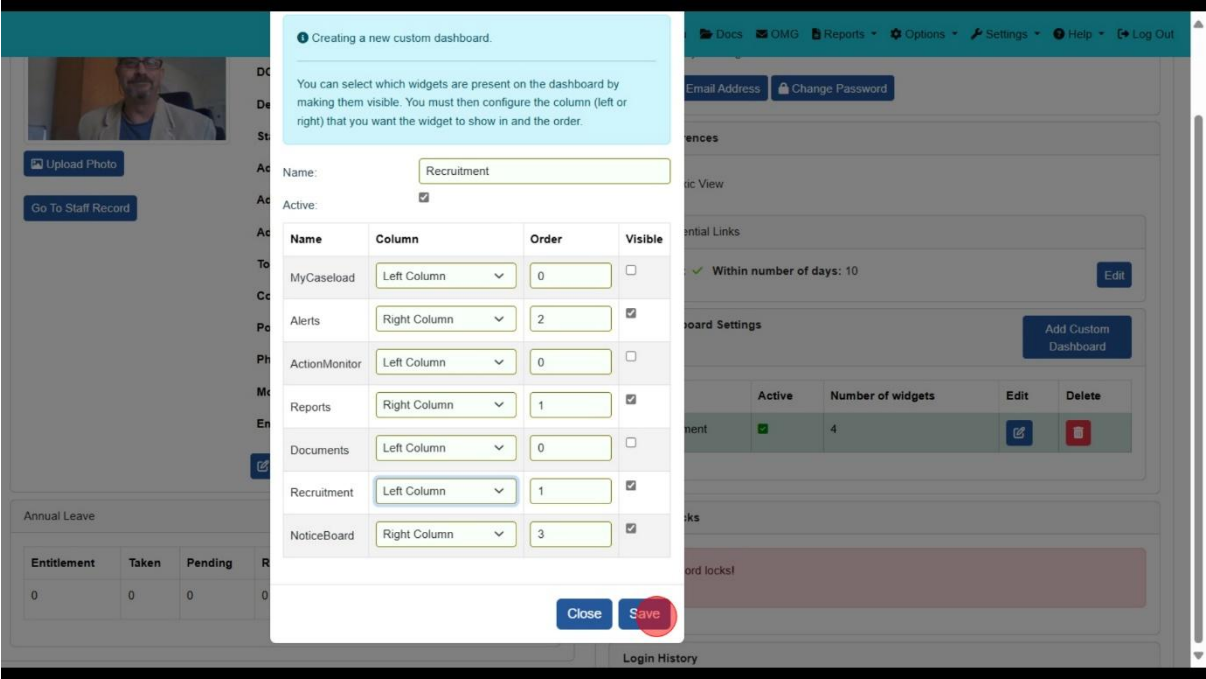
Step 17

Click "Left Column Right Column"



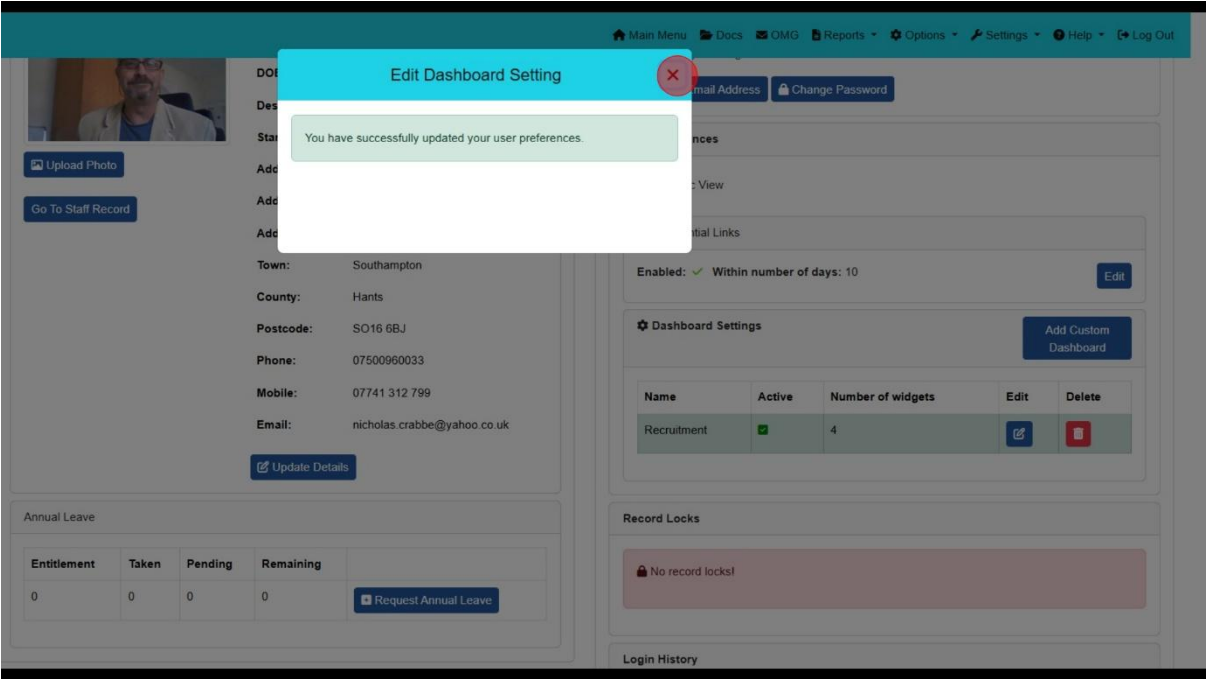
Step 18

Click "Save" link



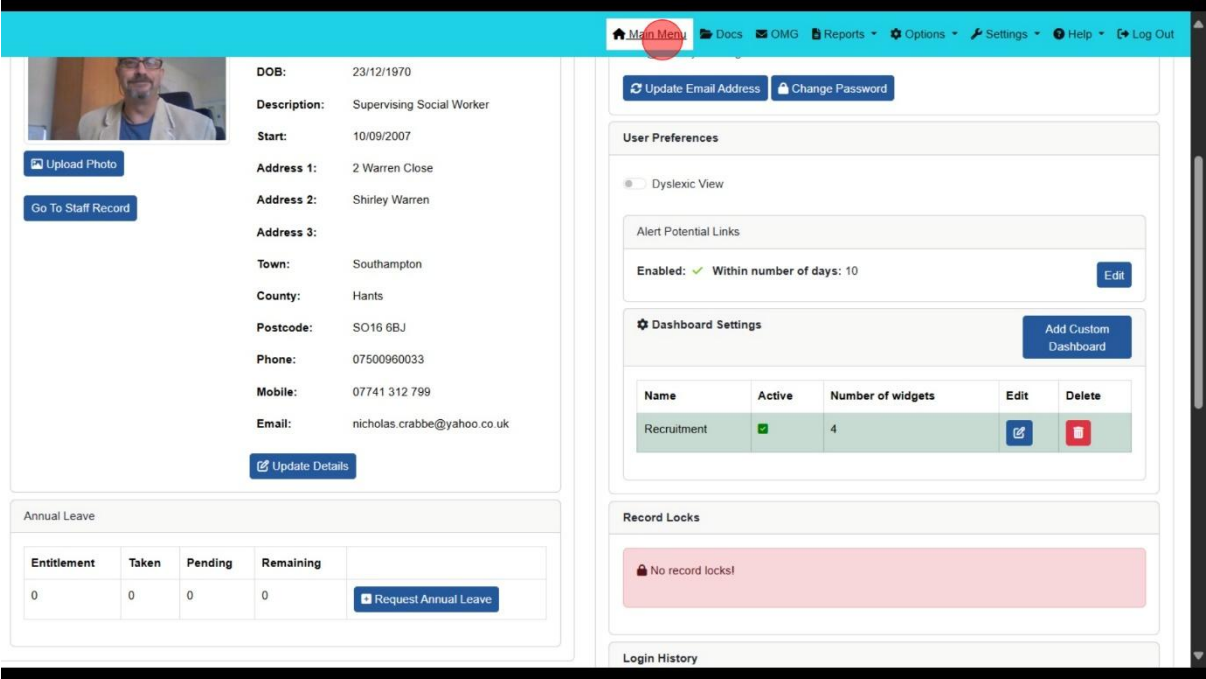
Step 19

Click button



Step 20

Click " Main Menu" link



## Step 21

Click "Reset" link

The screenshot shows the CHARMS Recruitment dashboard. At the top, there's a navigation bar with links: Main Menu, Docs, OMG, Reports, Options, Settings, Help, and Log Out. Below this, a summary bar shows counts for Families (19), Children (12), Staff (7), and Agencies (22). The main content area is divided into two sections. On the left, the 'Recruitment' section has tabs for 'List' and 'Chart'. It includes a search form with fields for 'Action', 'From', and 'To', and a 'Search' button. Below the search form, a message states 'Your search returned 0 results'. On the right, the 'Reports' section has a 'Reset' link in the top right corner, highlighted by a red circle and a tooltip that says 'Click to reset back to default dashboard'. The 'Reports' section also includes a search bar and a table of reports.

Name	Group	Action
Actions (progress) lookup list	Lookup Lists	<a href="#">View</a>
Actions lookup list detail - all modules	Lookup Lists	<a href="#">View</a>
Approved carer - contact details	Family	<a href="#">View</a>
Child progress between dates	Child	<a href="#">View</a>
Children currently placed with progress items visible to carer but no specific carer selected	Audit	<a href="#">View</a>

## Step 22

Click "My Account" link

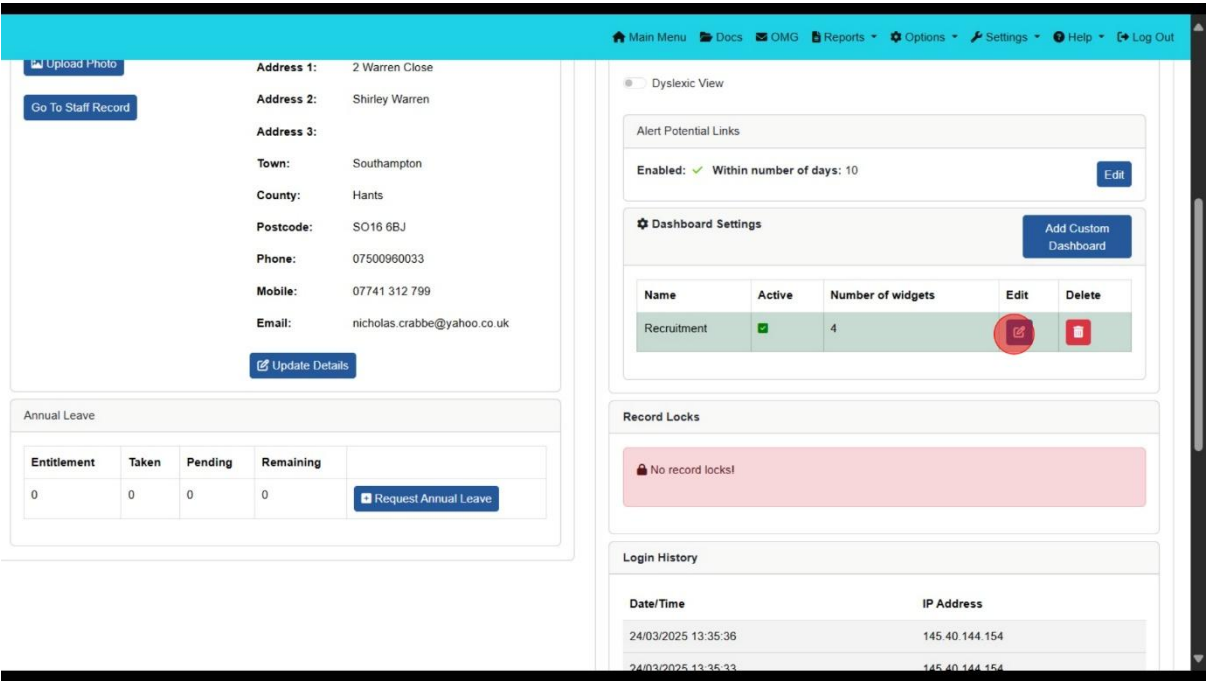
The screenshot shows the CHARMS user profile page for Nick Crabbe. At the top, there's a navigation bar with links: Main Menu, Docs, OMG, Reports, Options. Below this, a summary bar shows counts for Families (19), Children (12), Staff (7), and Agencies (22). The main content area is divided into two sections. On the left, the 'My Account' section shows the user's profile picture, name (Nick Crabbe), and a 'My Account' link. Below this, there's a 'bsn social care' logo and a 'Main Menu' section with links: Blue Sky Learning Website, Introduce a Friend, Blue Sky CHARMS carer training videos, Enquiries forwarding, CHARMS guidance (Under construction), Advice on coronavirus, and Logout. On the right, the 'Caseload' section shows a search bar and a table of records. The first record is for (8554) Buckfast/Dandelion, Theodor & Isabella, with status 'Approved' and '15 cases logs to verify'. The second record is for (11945) Crabbe, Nick, with status 'Approved' and 'Social Worker'. Below the table, there are buttons for 'Add Progress', 'Add Diary', 'Record Card', 'View', and 'Go To'. On the far right, there's an 'Alerts' section with links: Carer Logs (15), Child Progress (26), Carer Progress (1), and Unread Progress (1). Below this, there's a 'Compliance' section and a 'Reports' section.

Search	Search ID or Name of record	Action
Worker:	Nick Crabbe	<a href="#">Search</a>
Team Agency:		<a href="#">Search</a>

Name	Status	Action
(8554) Buckfast/Dandelion, Theodor & Isabella	Approved	<a href="#">15 cases logs to verify</a>
(11945) Crabbe, Nick	Approved	<a href="#">Social Worker</a>

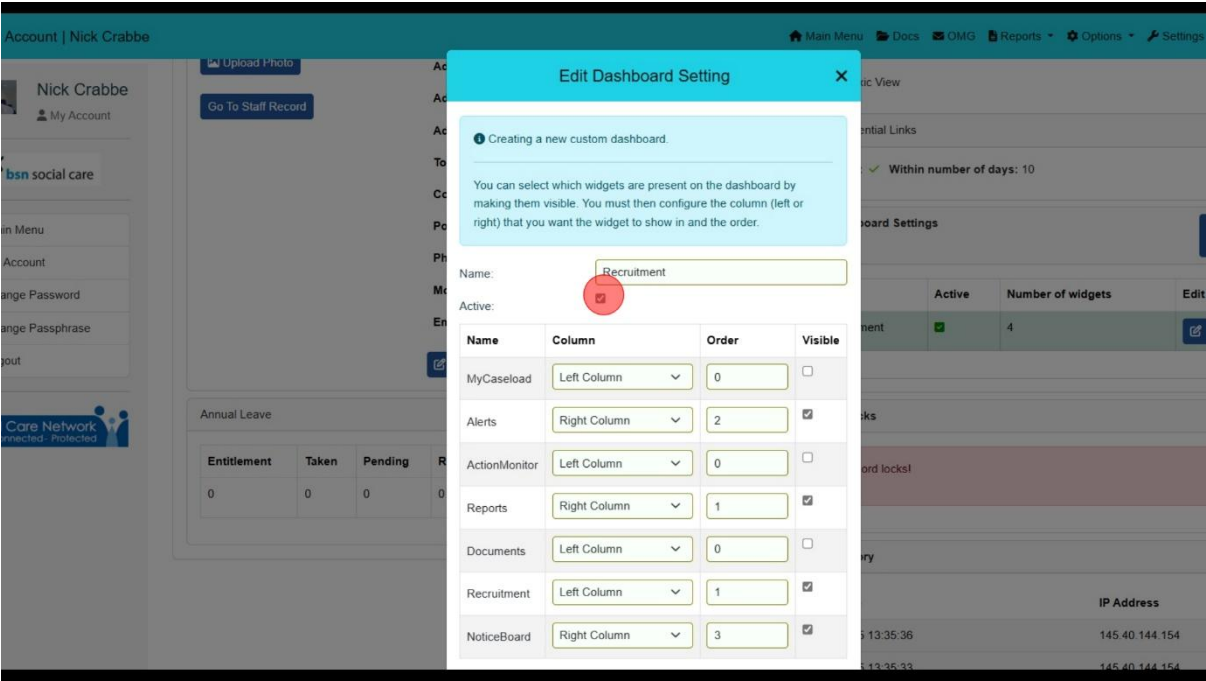
Step 23

Click



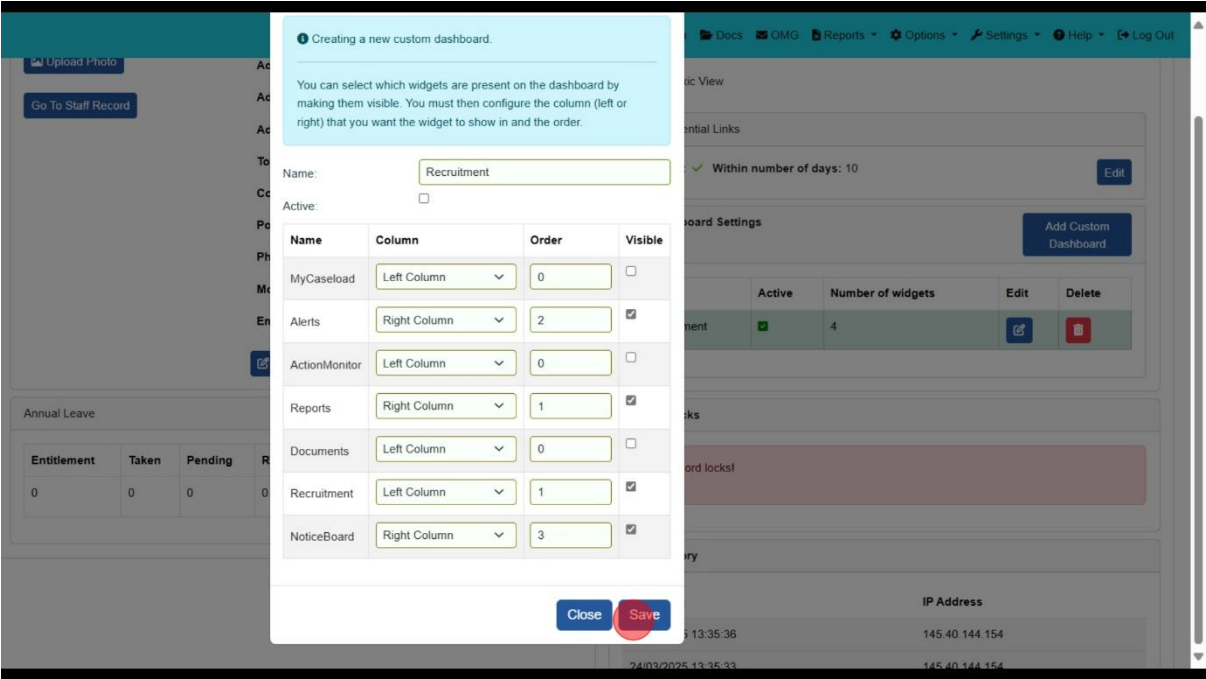
Step 24

Click input field



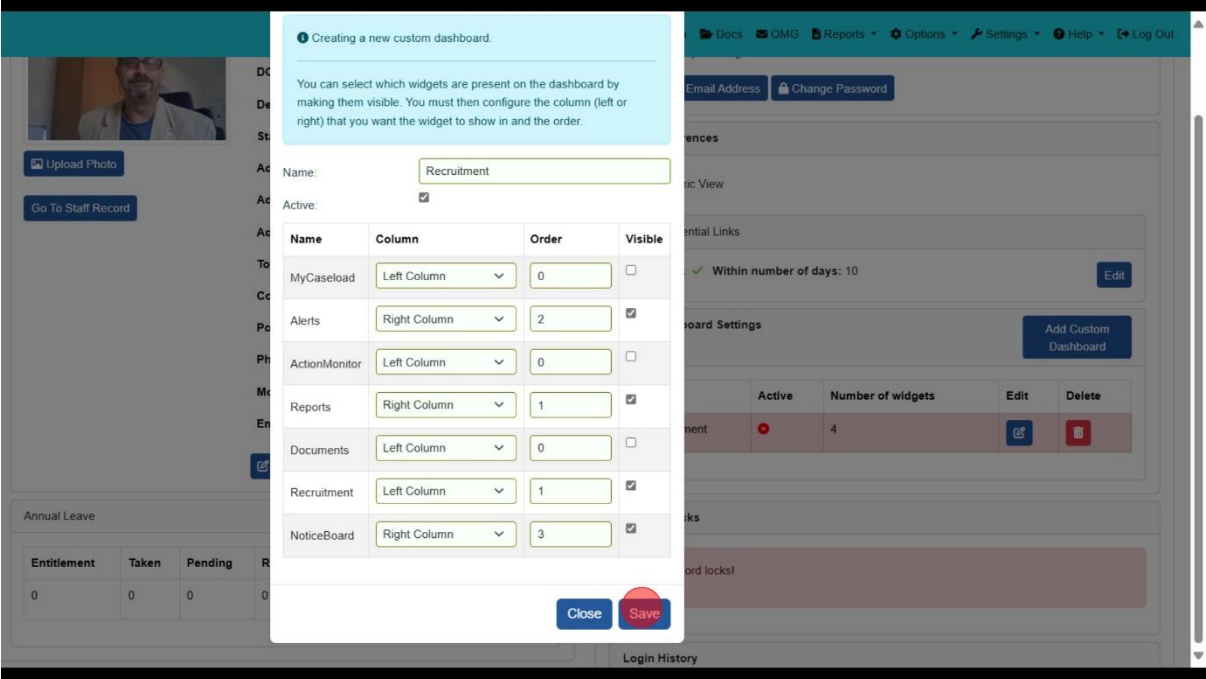
Step 25

Click "Save" link



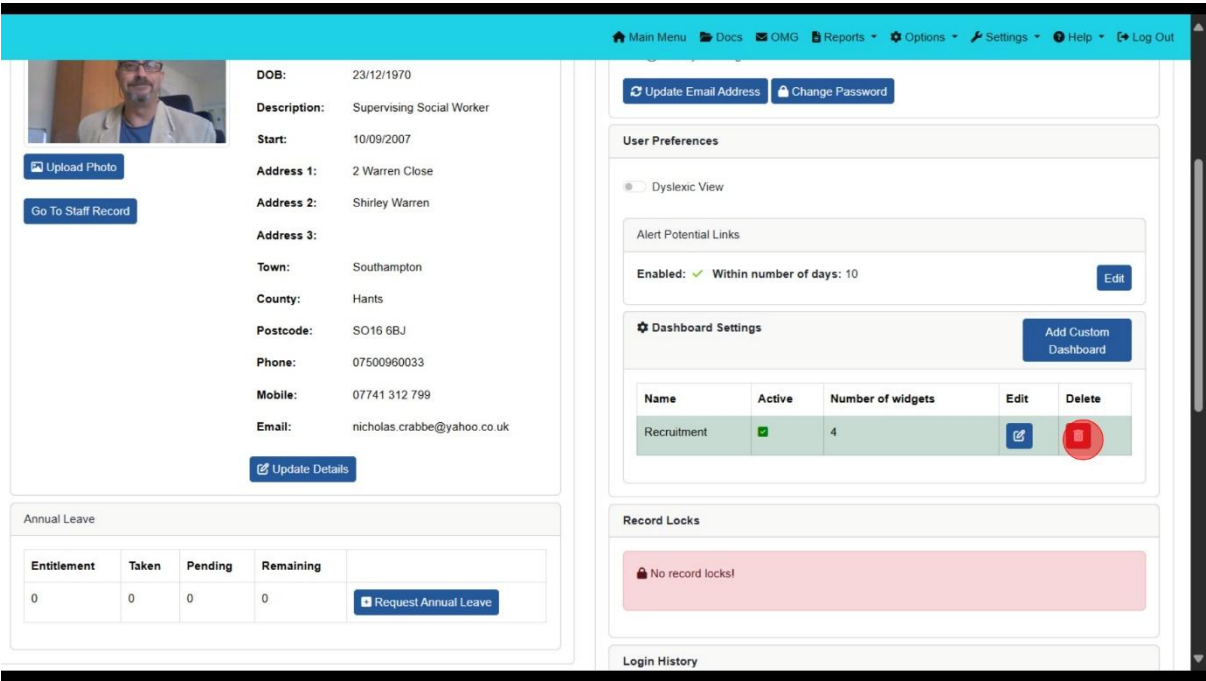
Step 26

Click "Save" link



Step 27

Or, you can click the delete button to permanently erase the dashboard if you will never need it again.



Step 28

Confirm your choice with the "Delete" button

