

## Creating Custom Dashboards:

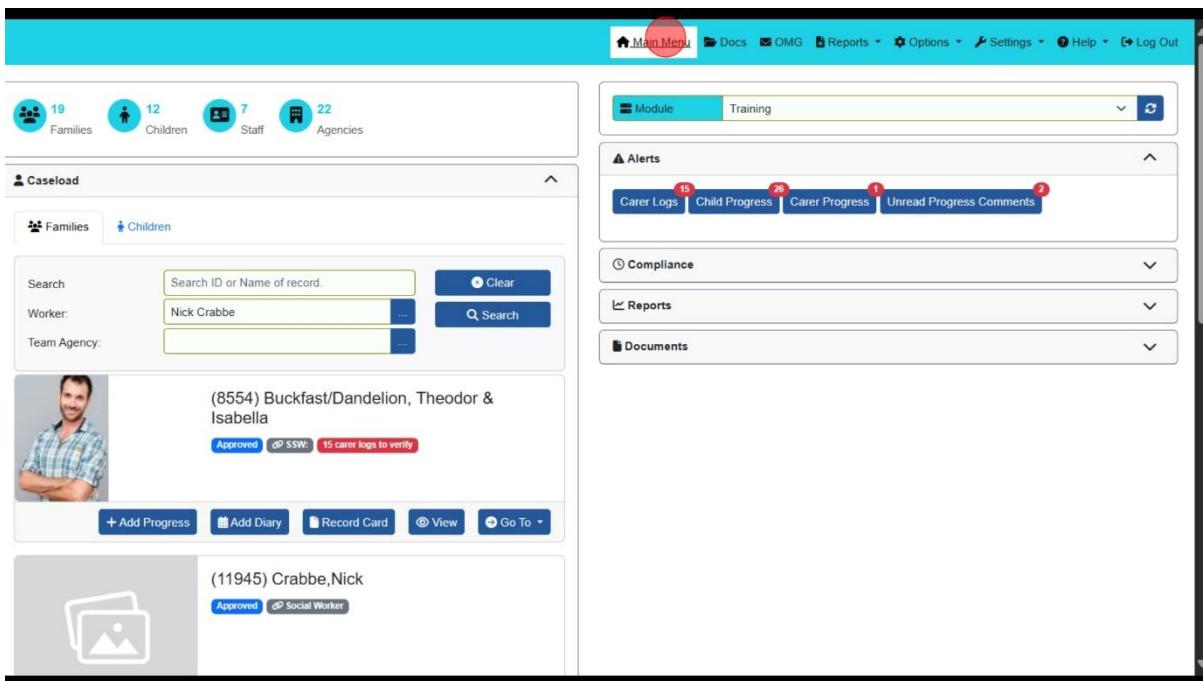
**CHARMS version 11.6.3 allows users to create their own custom dashboards on the Main Menu page by selecting from various available widgets, which can be set to appear in the left or right columns of the dashboard window. To create your own custom dashboard....**

### Step 1

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

### Step 2

Click the " Main Menu" button



### Step 3

Click "My Account" link

The screenshot shows the Charms Main Menu. At the top left is a user profile picture of Nick Crabbe. Next to it is his name, "Nick Crabbe", and a red circular button labeled "My Account". Below this is the "bsn social care" logo. On the left, there's a sidebar with links: "Main Menu", "Blue Sky Learning Website", "Introduce a Friend", and "Blue Skv CHARMS carer". The main area displays statistics: 19 Families, 12 Children, 7 Staff, and 22 Agencies. Below this is a "Caseload" section with tabs for "Families" and "Children". It includes a search bar with placeholder "Search ID or Name of record.", a "Worker:" field containing "Nick Crabbe", and a "Team Agency:" field.

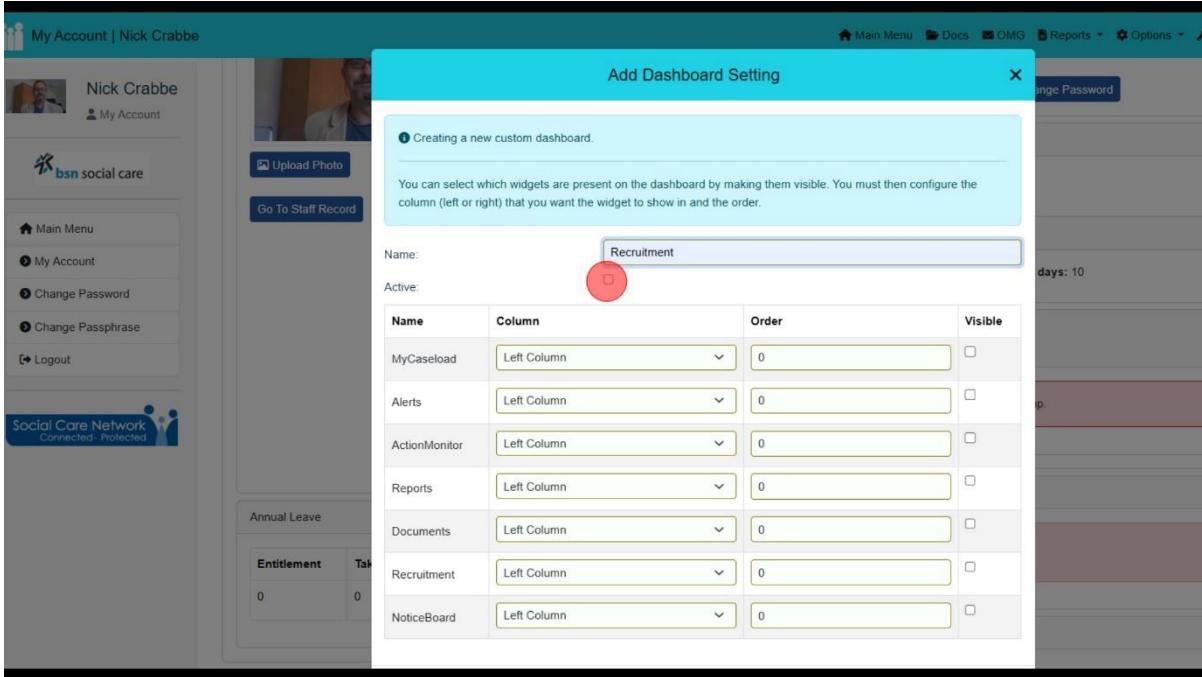
## Step 4

Click "Add Custom Dashboard" link

This screenshot shows a staff profile page. On the left, there's a photo of the user, a "Upload Photo" button, and a "Go To Staff Record" button. The profile details include: DOB: 23/12/1970, Description: Supervising Social Worker, Start: 10/09/2007, Address 1: 2 Warren Close, Address 2: Shirley Warren, Address 3: (empty), Town: Southampton, County: Hants, Postcode: SO16 6BJ, Phone: 07500960033, Mobile: 07741 312 799, Email: nicholas.crabbe@yahoo.co.uk, and an "Update Details" button. Below this is an "Annual Leave" section with a table showing Entitlement (0), Taken (0), Pending (0), Remaining (0), and a "Request Annual Leave" button. The right side of the screen shows the "User Preferences" and "Dashboard Settings" sections. In the "Dashboard Settings" section, there is a blue button with a red circle around it labeled "Add Custom Dashboard".

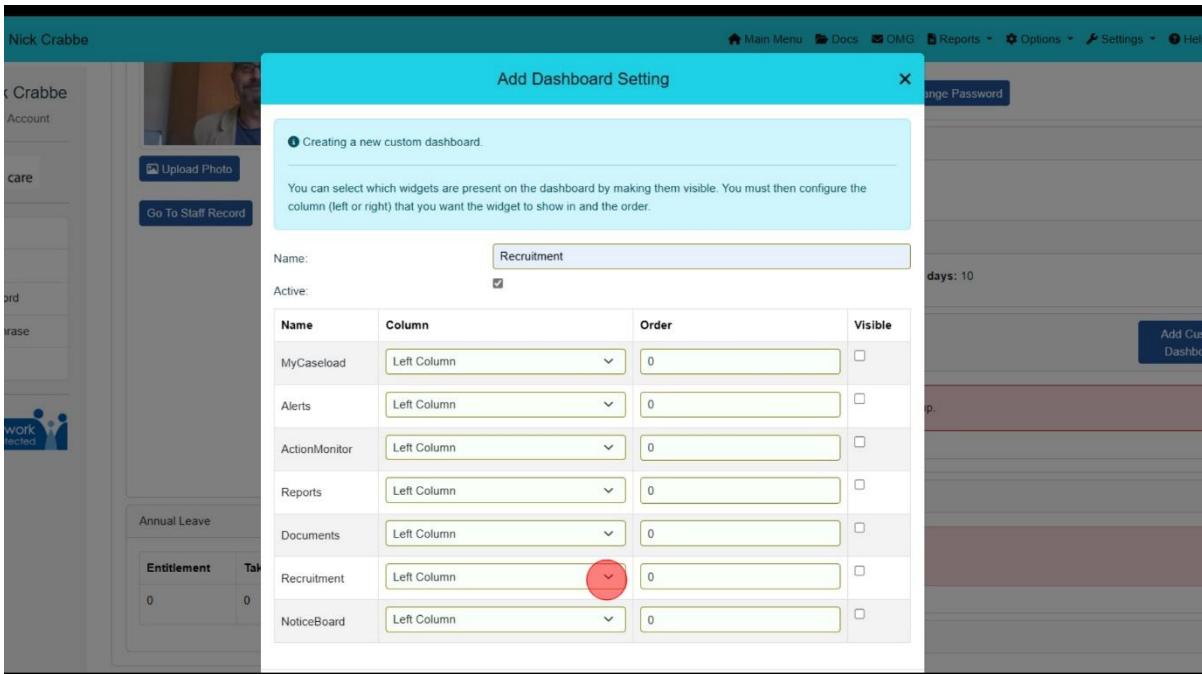
## Step 5

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



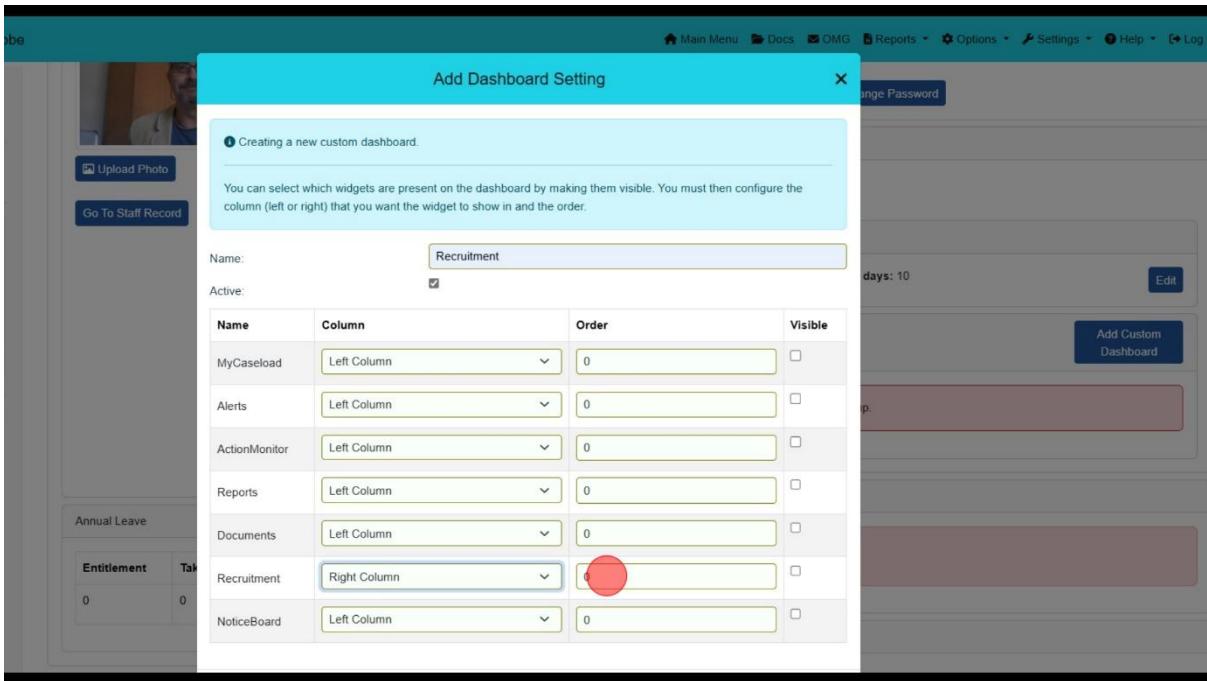
## Step 6

**Click "Left Column Right Column"**



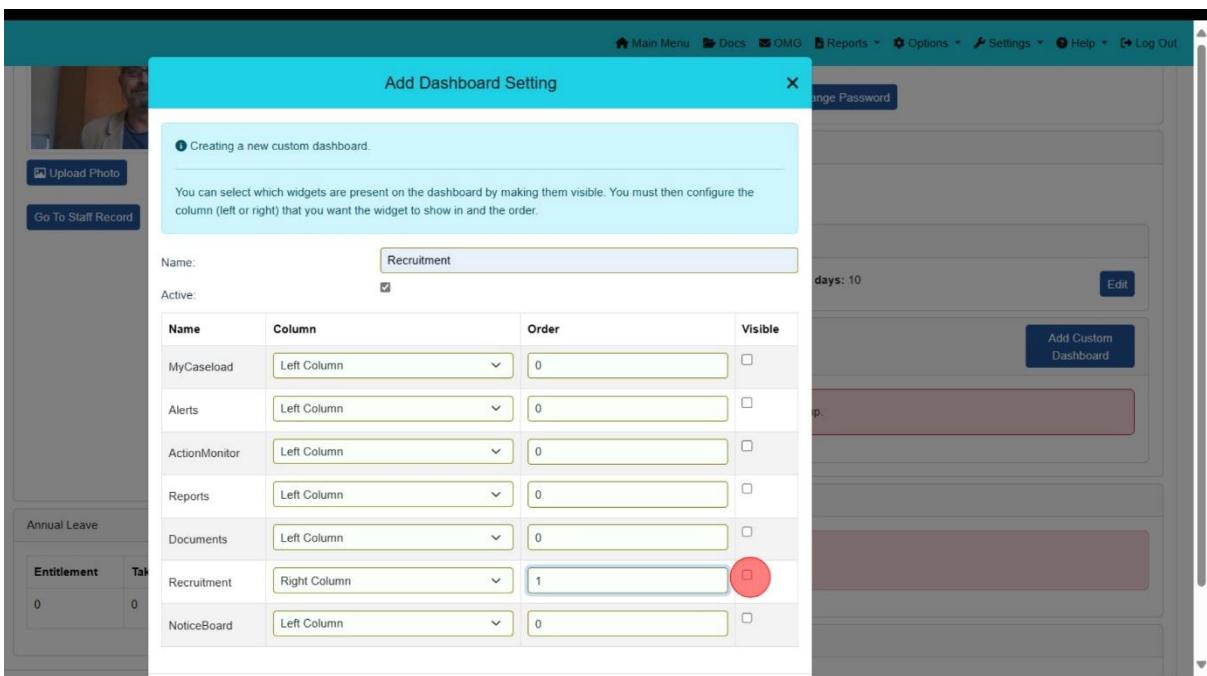
## Step 7

### Click input field



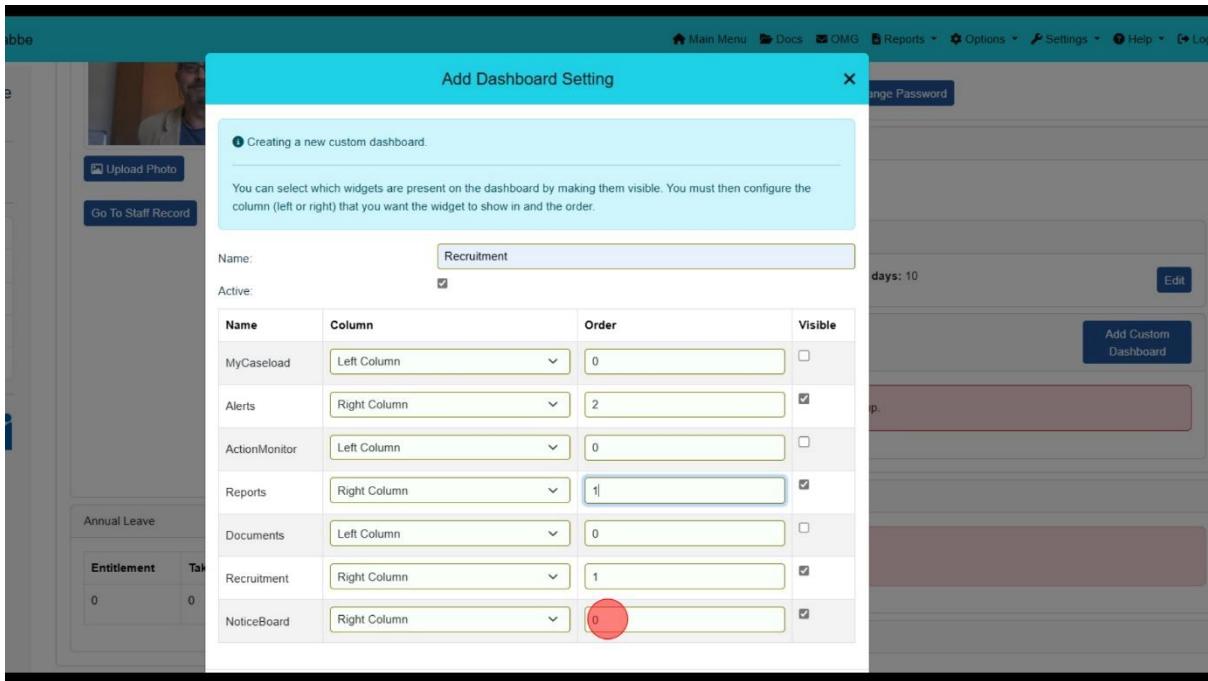
## Step 8

### Click input field



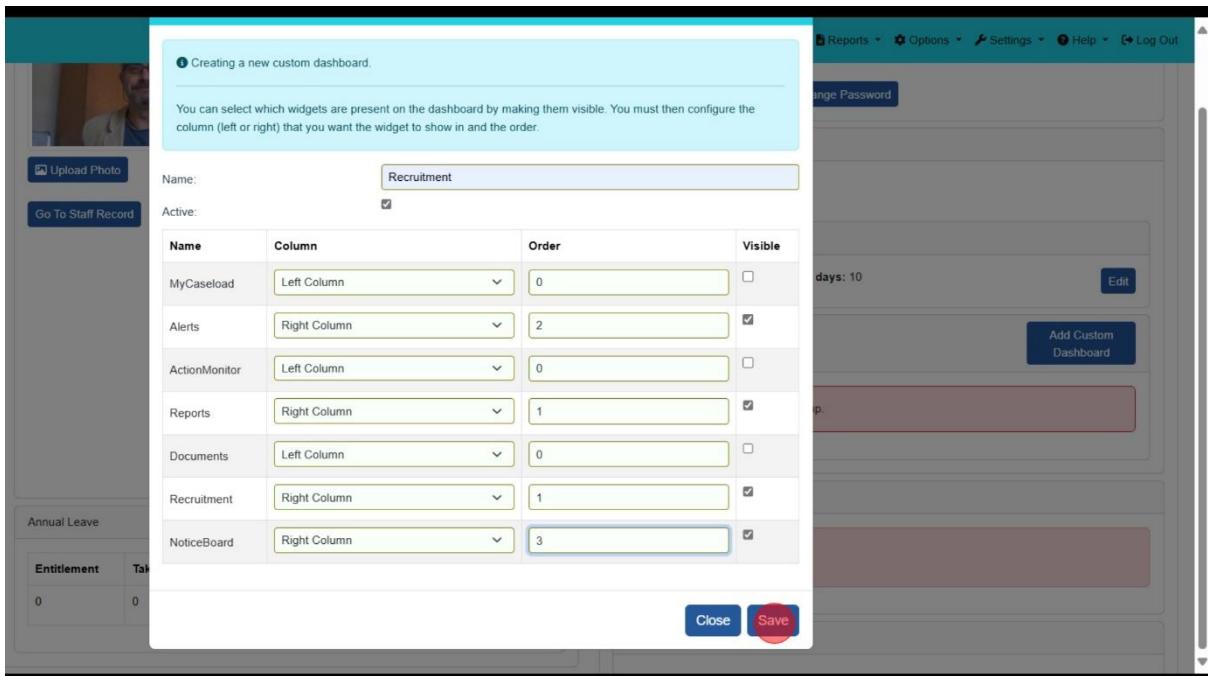
## Step 9

### Click input field



## Step 10

### Click "Save" link



## Step 11

### Click button

The screenshot shows the 'Add Dashboard Setting' page. At the top, there is a message: 'You have successfully updated your user preferences.' Below this, there are several sections: 'Personal Information' (Town: Southampton, County: Hants, Postcode: SO16 6BJ, Phone: 07500960033, Mobile: 07741 312 799, Email: nicholas.crabbe@yahoo.co.uk), 'Dashboard Settings' (Enabled: Within number of days: 10), 'Record Locks' (No record locks!), and 'Login History'. A red circle highlights the 'Edit' button in the 'Dashboard Settings' section.

## Step 12

### Click "Main Menu" link

The screenshot shows the 'Main Menu' page. It includes sections for 'User Preferences' (Dyslexic View), 'Alert Potential Links' (Enabled: Within number of days: 10), 'Dashboard Settings' (Name: Recruitment, Active: checked, Number of widgets: 4), 'Record Locks' (No record locks!), and 'Login History'. A red circle highlights the 'Main Menu' link in the top navigation bar.

## Step 13

### Click "Recruitment"

The screenshot shows the CHARMS software interface. At the top, there is a navigation bar with links for Main Menu, Docs, OMG, Reports, Options, Settings, Help, and Log Out. Below the navigation bar, there are four status indicators: Families (19), Children (12), Staff (7), and Agencies (22). The main content area has a header 'Module: Training' and a sub-header 'Dashboard: Recruitment'. A red circle highlights the 'Reset' button. Below this, there is a section titled 'Reports' with a search bar and filter options for 'My Favourites', 'Agency Favourites', and 'All'. The main table displays six rows of data:

Name	Group	Action
Actions (progress) lookup list	Lookup Lists	
Actions lookup list detail - all modules	Lookup Lists	
Approved carer - contact details	Family	
Child progress between dates	Child	
Children currently placed with progress items visible to carer but no specific carer selected	Audit	

At the bottom, there are navigation buttons for Prev, Page 1, Next, and a total record count of 4.

## Step 14

### Click button

This screenshot is identical to the one above, showing the 'Recruitment' report in the CHARMS software. The red circle is now highlighting the 'Search' button within the 'Reports' section's search bar.

## Step 15

### Click " My Account" link

The screenshot shows the CHARMS software interface. On the left, there's a sidebar with a user profile picture of Nick Crabbe and a red circle highlighting the "My Account" link. Below the profile are links for Main Menu, Blue Sky Learning Website, Introduce a Friend, Blue Sky CHARMS carer training videos, Enquiries forwarding, CHARMS guidance (Under construction), Advice on coronavirus, and Logout. At the bottom of the sidebar is the Social Care Network logo. The main content area has a header with "Main Menu", "Docs", "OMG", "Reports", "Options", and other navigation links. Below the header are four circular icons: Families (19), Children (12), Staff (7), and Agencies (22). To the right of these icons is a "Reports" section. This section includes a "Module" dropdown set to "Training", a "Dashboard" link, and a "Reports" link. Under "Reports", there are tabs for "Recent" and "Shared With Me". A search bar and a "Select" dropdown are also present. The main report table has columns for "Name" and "Group". It lists several items: Actions (progress) lookup list (Lookup Lists), Actions lookup list detail - all modules (Lookup Lists), Approved carer - contact details (Family), Child progress between dates (Child), and Children currently placed with progress items visible to carer but no specific carer selected (Audit). At the bottom of the report table are "Prev", "Page 1", and "Of 4 (Records 1-4)" buttons.

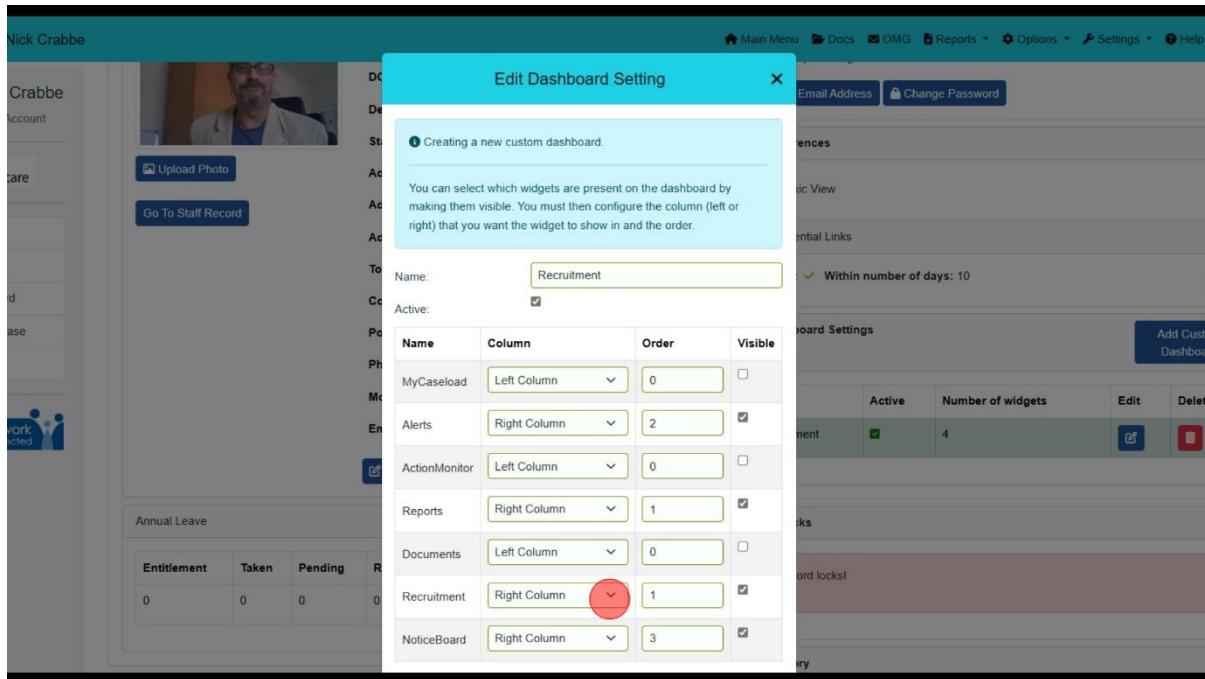
## Step 16

### Click link

The screenshot shows the CHARMS software interface. On the left, there's a staff profile section with a photo of a man, an "Upload Photo" button, and a "Go To Staff Record" button. Below this are fields for 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), and Email (nicholas.crabbe@yahoo.co.uk). There's also a "Update Details" button. To the right, there are several sections: "User Preferences" with a "Dyslexic View" toggle, "Alert Potential Links" with an "Enabled" checkbox checked and a "Within number of days: 10" input field, and "Dashboard Settings" with a table showing one dashboard named "Recruitment" (Active: checked, Number of widgets: 4). There are "Edit" and "Delete" buttons for this row. Below these are "Record Locks" (showing "No record locks!") and "Login History".

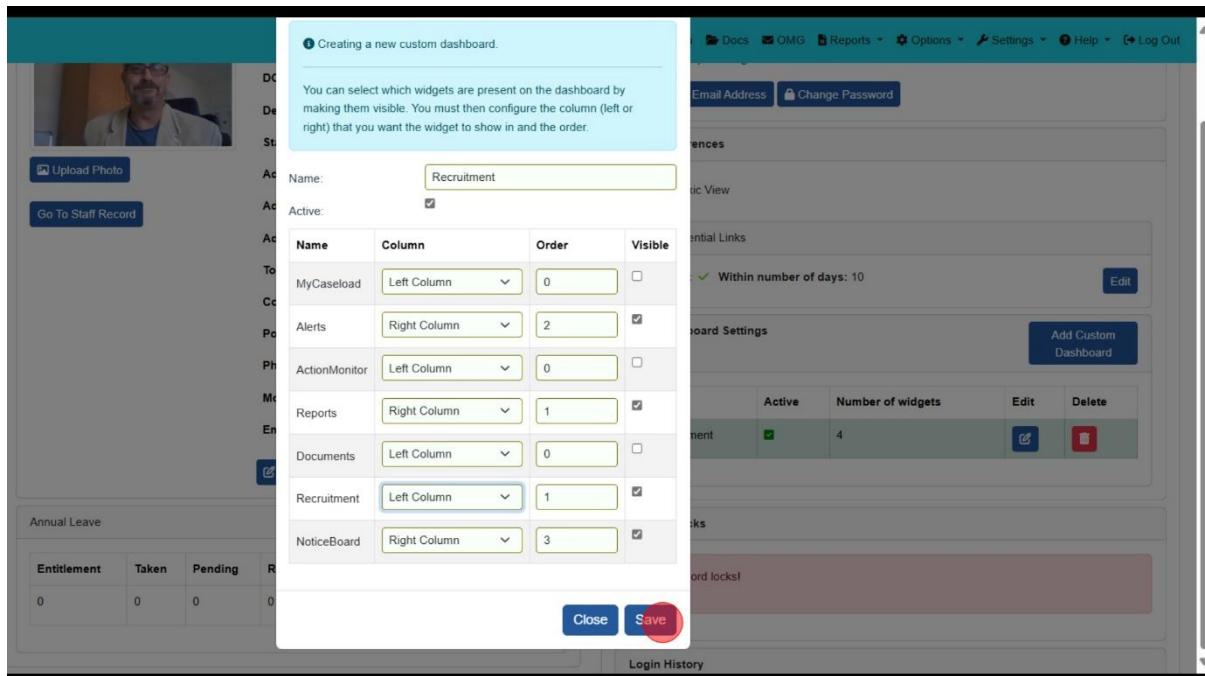
## Step 17

Click "Left Column Right Column"



## Step 18

Click "Save" link



## Step 19

### Click button

The screenshot shows the CHARMS software interface. At the top, there is a navigation bar with links: Main Menu, Docs, OMG, Reports, Options, Settings, Help, and Log Out. A red circle highlights the 'Main Menu' link. Below the navigation bar is a profile picture of a man and several buttons: Upload Photo, Go To Staff Record, and Update Details. To the right of these buttons is a modal window titled 'Edit Dashboard Setting'. Inside the modal, a green box displays the message: 'You have successfully updated your user preferences.' At the bottom of the modal is a close button (X). The main dashboard area contains sections for Personal Information (DOB: 23/12/1970, Description: Supervising Social Worker, Start: 10/09/2007, Address 1: 2 Warren Close, Address 2: Shirley Warren, Address 3: Southampton, County: Hants, Postcode: SO16 6BJ, Phone: 07500960033, Mobile: 07741 312 799, Email: nicholas.crabbe@yahoo.co.uk), Annual Leave (Entitlement: 0, Taken: 0, Pending: 0, Remaining: 0, Request Annual Leave button), and Dashboard Settings (Recruitment widget, 4 widgets total). There are also sections for Record Locks (No record locks!) and Login History.

## Step 20

### Click "Main Menu" link

This screenshot shows the same CHARMS software interface as the previous one, but with a key difference: the 'Main Menu' link in the top navigation bar is now highlighted with a red circle, indicating it has been clicked. The rest of the interface, including the modal window, personal information, and dashboard settings, appears identical to the previous screenshot.

## Step 21

### Click "Reset" link

The screenshot shows the CHARMS software interface. At the top, there's a navigation bar with links like 'Main Menu', 'Docs', 'OMG', 'Reports', 'Options', 'Settings', 'Help', and 'Log Out'. Below the navigation bar, there are four status indicators: Families (19), Children (12), Staff (7), and Agencies (22). On the left, there's a 'Recruitment' section with 'List' and 'Chart' tabs, search filters for 'From' and 'To' dates, and a message saying 'Your search returned 0 results'. On the right, there's a 'Reports' section with tabs for 'Reports', 'Recent', and 'Shared With Me'. It shows a list of reports grouped by 'Name' and 'Group', with options to 'View' each report. A tooltip 'Click to reset back to default dashboard' is overlaid on the 'Reset' button in the 'Reports' tab header. At the bottom, there are buttons for 'Prev', 'Page 1', and 'Next'.

## Step 22

### Click "My Account" link

The screenshot shows the CHARMS software interface. At the top, there's a navigation bar with links like 'Main Menu', 'Docs', 'OMG', 'Reports', 'Options', and 'Logout'. Below the navigation bar, there are four status indicators: Families (19), Children (12), Staff (7), and Agencies (22). On the left, there's a 'Caseload' section with tabs for 'Families' and 'Children'. It includes a search bar for 'Search ID or Name of record', dropdowns for 'Worker' (set to 'Nick Crabbe') and 'Team Agency', and a list of caseload items. One item is shown with a photo of a man, address '(8554) Buckfast/Dandelion, Theodor & Isabella', and status 'Approved'. On the right, there are several other modules: 'Training', 'Dashboard', 'Alerts' (with notifications for 'Carer Logs' (15), 'Child Progress' (26), 'Carer Progress' (1), and 'Unread Progress'), 'Compliance', 'Reports', and 'Documents'. A tooltip 'Click to reset back to default dashboard' is overlaid on the 'Reset' button in the 'Caseload' tab header.

## Step 23

### Click

The screenshot shows the CHARMS software interface. On the left, there is a sidebar with options like 'Upload Photo', 'Go To Staff Record', 'bsn social care', 'Main Menu', 'Account', 'Change Password', 'Change Passphrase', and 'Logout'. The main content area displays staff details (Address 1: 2 Warren Close, Address 2: Shirley Warren, Address 3: Southampton, County: Hants, Postcode: SO16 6BJ, Phone: 07500960033, Mobile: 07741 312 799, Email: nicholas.crabbe@yahoo.co.uk) and an 'Annual Leave' section with a table showing Entitlement, Taken, Pending, and Remaining values all at 0. There is a 'Request Annual Leave' button. On the right, there are several panels: 'Dyslexic View' (disabled), 'Alert Potential Links' (Enabled: Within number of days: 10, with an 'Edit' button), 'Dashboard Settings' (with a table showing 'Recruitment' as active with 4 widgets, and edit and delete buttons circled in red), 'Record Locks' (No record locks!), 'Login History' (Date/Time: 24/03/2025 13:35:36, IP Address: 145.40.144.154), and another 'Dashboard Settings' panel.

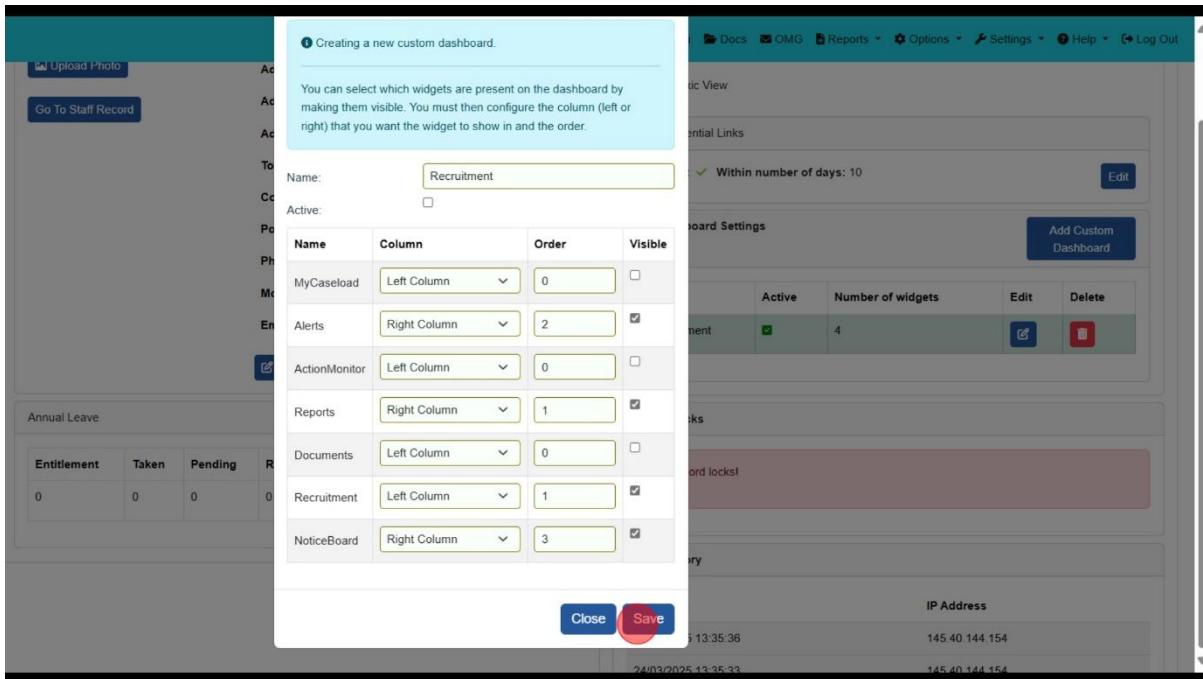
## Step 24

### Click input field

The screenshot shows the CHARMS software interface with the 'Edit Dashboard Setting' dialog box open. The dialog has a title 'Edit Dashboard Setting' and a sub-instruction 'Creating a new custom dashboard.' It contains a text area explaining how to select widgets and their visibility. Below this is a table with columns 'Name', 'Column', 'Order', and 'Visible'. The table lists several widgets: MyCaseload (Left Column, Order 0, Visible), Alerts (Right Column, Order 2, Visible), ActionMonitor (Left Column, Order 0, Not Visible), Reports (Right Column, Order 1, Visible), Documents (Left Column, Order 0, Not Visible), Recruitment (Left Column, Order 1, Visible), and NoticeBoard (Right Column, Order 3, Visible). The 'Visible' column for the first three rows has a checked checkbox, while the others have an unchecked checkbox. The background shows the same dashboard settings and history as in Step 23.

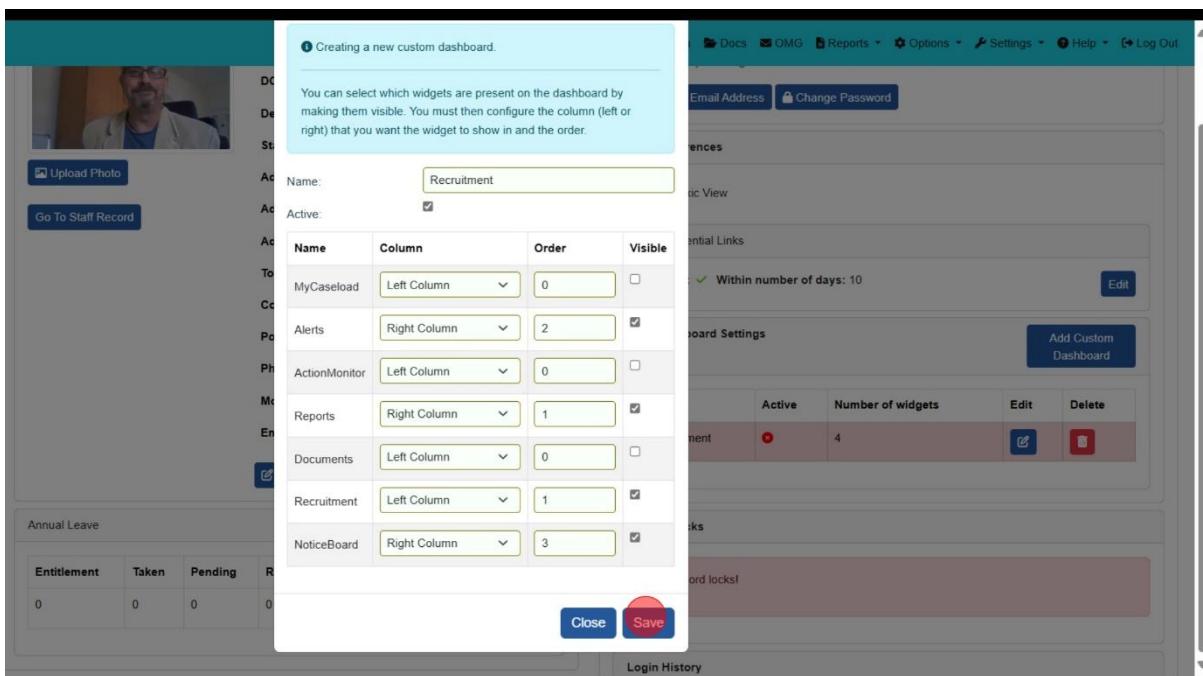
## Step 25

### Click "Save" link



## Step 26

### Click "Save" link



## Step 27

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

The screenshot shows the CHARMS software interface. On the left, there is a profile picture of a man with glasses and a white coat. Below the profile picture, there are several staff details: 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), and Email (nicholas.crabbe@yahoo.co.uk). There is also a "Update Details" button. To the right, there is a "User Preferences" section with a "Dyslexic View" checkbox, an "Alert Potential Links" section with an "Enabled" checkbox, a "Dashboard Settings" section with a "Recruitment" entry (Active: checked, Number of widgets: 4), and a "Record Locks" section stating "No record locks!". At the bottom, there is a "Login History" section.

## Step 28

Confirm your choice with the "Delete" button

The screenshot shows the same CHARMS software interface as the previous step. A modal dialog box titled "Delete Dashboard Setting" is displayed in the center. The dialog contains a message: "Are you sure that you want to delete the dashboard: Recruitment". There are two buttons at the bottom: "Close" and "Delete". The "Delete" button is highlighted with a red circle. In the background, the dashboard settings table shows the "Recruitment" entry with an Active checkbox checked and a Delete button visible. The rest of the dashboard and its sections (Annual Leave, Record Locks, Login History) are visible behind the dialog.

