

Using List Views and Dashboards

COMPLAINTS AND INTEGRITY MANAGEMENT IN SERVICE ONE

Using the List View shortcuts

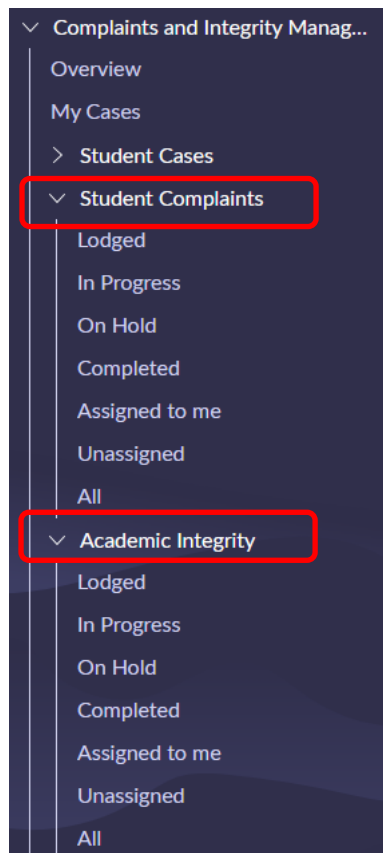
When using the List View in the Complaints and Integrity Management Module, in Service One you have access to quick links to view the student cases.

For example:

Staff who have been assigned to manage and investigate student complaints will have access to the quick links for those cases.

Staff who have been assigned to manage and investigate academic integrity issues will have access to the quick links for those cases.

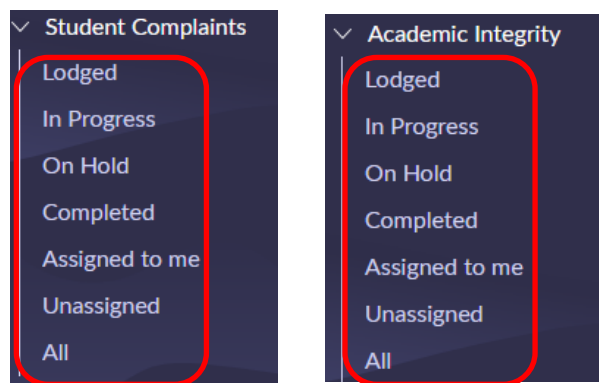
The quick links are found under the *All menu* at the top left-hand side of the screen. You can pin this menu, so that it is always located on the left-hand side of your screen for easy access.



Using List Views and Dashboards

COMPLAINTS AND INTEGRITY MANAGEMENT IN SERVICE ONE

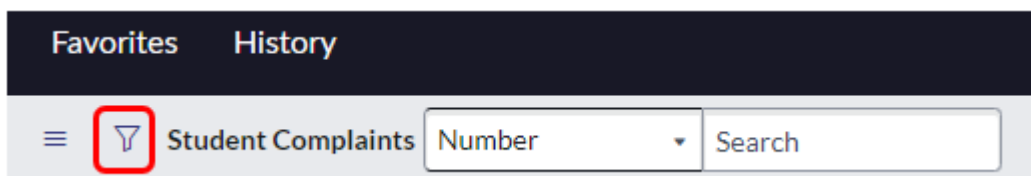
Within the quick link header, you will find additional shortcuts, which allow you to view cases by Case State (i.e. Lodged, On Hold, Investigation, Completed, etc) .



Creating a customised List View

You can create your own list view using the Condition Builder. To access the Condition Builder, click on the funnel icon at the top of your screen.

Note: The images below generally describe the following capabilities using a complaints case in the Complaints and Integrity Management Module. Creating a customised list view, sorting, and filtering etc. is the same if you are assigned to academic integrity issue cases.



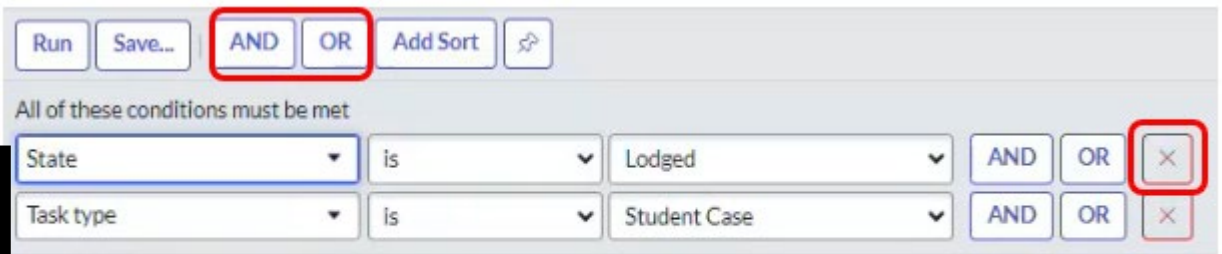
Using List Views and Dashboards

COMPLAINTS AND INTEGRITY MANAGEMENT IN SERVICE ONE

You can enter any combination of conditions and as many different combinations, to build the case list you want to view.

Click **AND** or **OR** to add additional lines to your conditions.

You can remove a line by clicking on the **X** button to the right-hand side of the line.



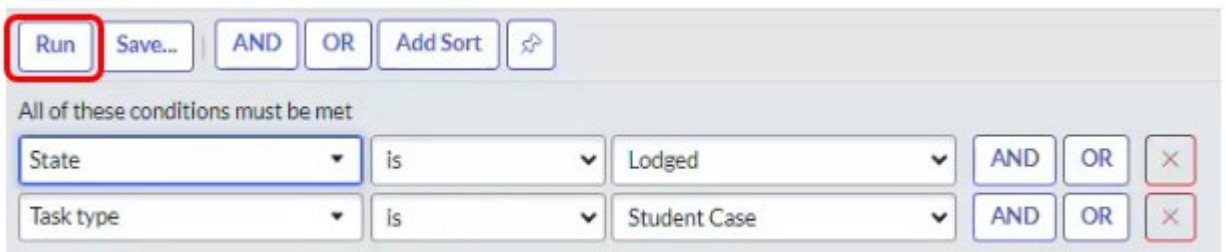
Run Save... **AND** **OR** Add Sort

All of these conditions must be met

State	is	Lodged	AND	OR	X
Task type	is	Student Case	AND	OR	X

Above is an example of Conditions asking to return a list of cases for which the State is "Lodged" and the Task Type is "Student Case".

Once you have entered the conditions you need, click **Run** to return the applicable results.

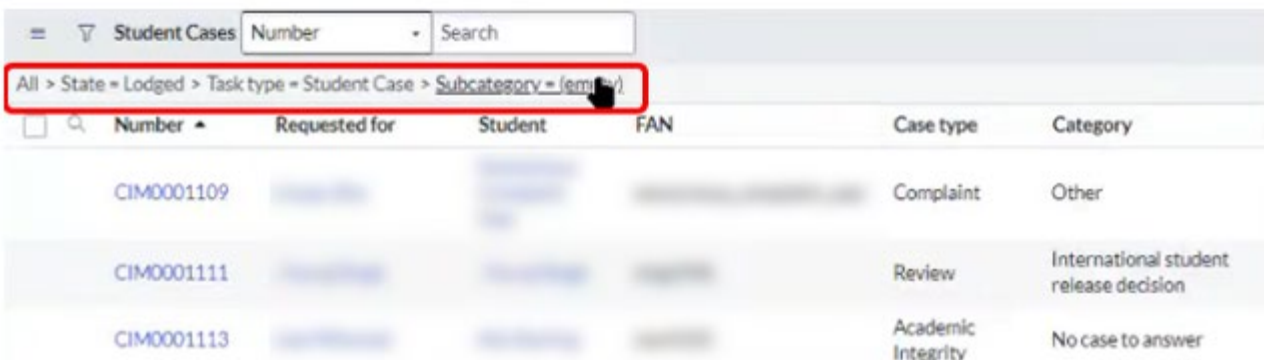


Run Save... **AND** **OR** Add Sort

All of these conditions must be met

State	is	Lodged	AND	OR	X
Task type	is	Student Case	AND	OR	X

Note: A "breadcrumbs" trail will save at the top of the part of this breadcrumbs trail to remove a particular condition at any time.



Number	Requested for	Student	FAN	Case type	Category
CIM0001109				Complaint	Other
CIM0001111				Review	International student release decision
CIM0001113				Academic Integrity	No case to answer

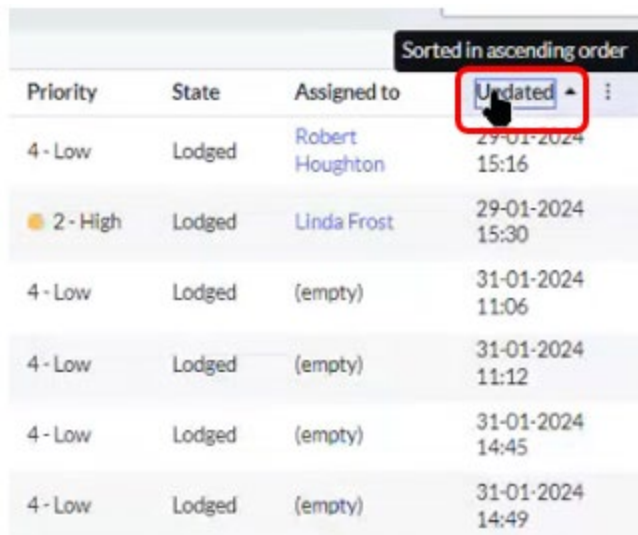
Using List Views and Dashboards

COMPLAINTS AND INTEGRITY MANAGEMENT IN SERVICE ONE

Sorting/Filtering a List View

When viewing a list, you can sort it in a number of ways.

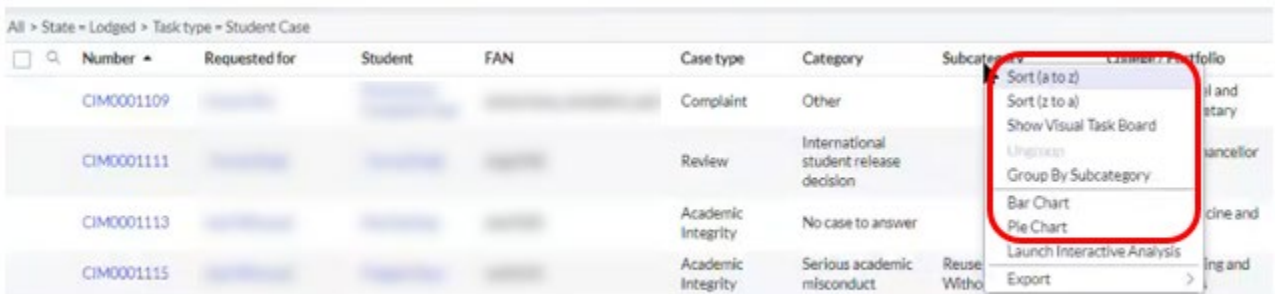
To sort the list in ascending order, click on the relevant column heading (i.e. Updated date) and the list will appear in ascending order.



Priority	State	Assigned to	Updated
4 - Low	Lodged	Robert Houghton	29-01-2024 15:16
2 - High	Lodged	Linda Frost	29-01-2024 15:30
4 - Low	Lodged	(empty)	31-01-2024 11:06
4 - Low	Lodged	(empty)	31-01-2024 11:12
4 - Low	Lodged	(empty)	31-01-2024 14:45
4 - Low	Lodged	(empty)	31-01-2024 14:49

To sort the list using one of the column headings, click on the applicable Heading (i.e. Subcategory) and **right-click**.

Select the desired option from the pop-up menu (i.e. Group by Subcategory).

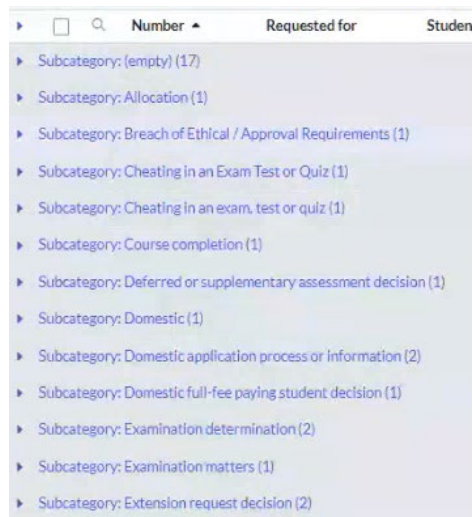


Number	Requested for	Student	FAN	Case type	Category	Subcategory
CIM0001109				Complaint	Other	
CIM0001111				Review	International student release decision	
CIM0001113				Academic Integrity	No case to answer	
CIM0001115				Academic Integrity	Serious academic misconduct	Reuse Witho

Using List Views and Dashboards

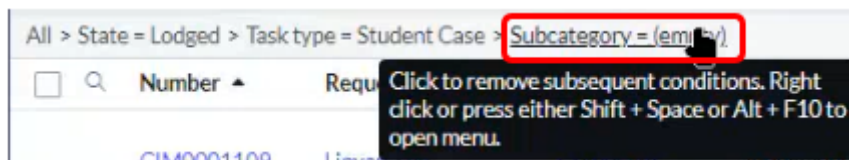
COMPLAINTS AND INTEGRITY MANAGEMENT IN SERVICE ONE

The list will then be sorted based on what you have selected. In this example, it is by Subcategory.



You can now click on any of the Subcategory's in the list to view cases for that particular subcategory only.

Note: You can click on the last item in the Breadcrumbs list at the top left-hand side of the screen to remove the specific conditions at any time. This will refresh the list.




Using List Views and Dashboards

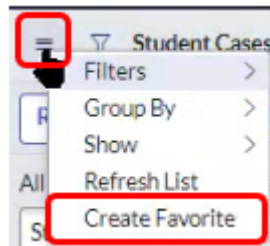
COMPLAINTS AND INTEGRITY MANAGEMENT IN SERVICE ONE

Save a particular List View as a Favourite

If there is a particular list view you will continually refer to, you can save it as a Favourite for easy access in future.

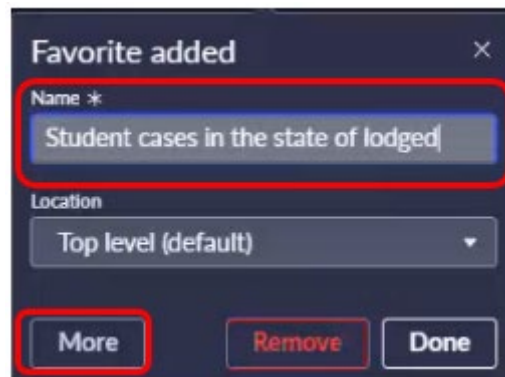
Once you have used the Condition Builder to bring up the desired list of cases, click on the  icon in the top left-hand side of the screen.

Click **Create Favourite**.



Enter a suitable **Name**.

If you wish to add more customisation for this particular list (ie. Colours and Icons), Click **More**.



Favorite added ×

Name *
Student cases in the state of lodged

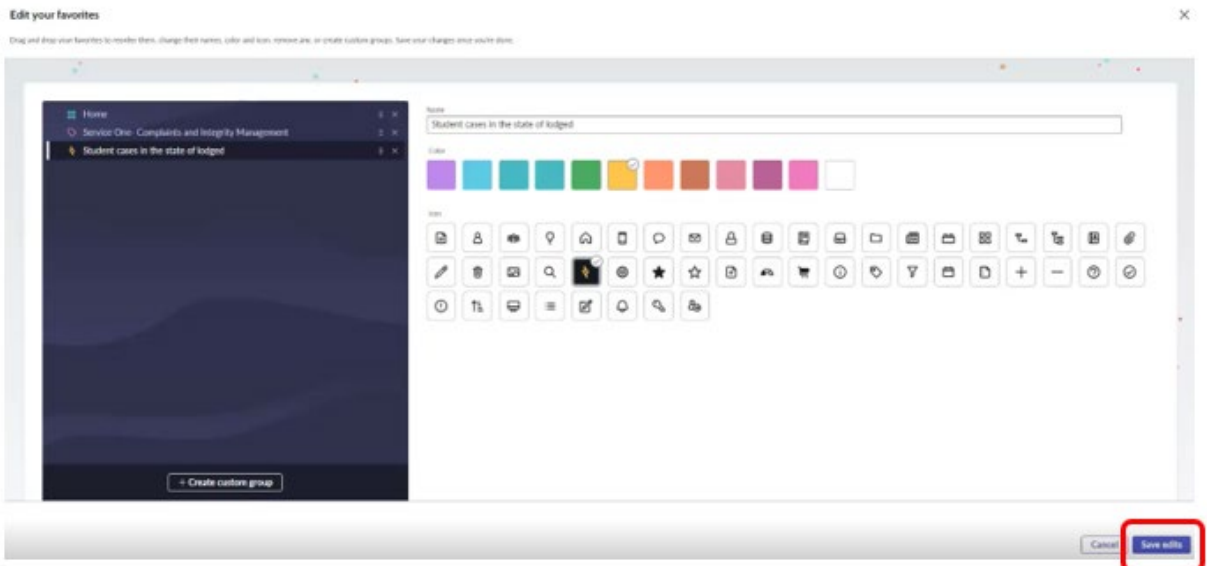
Location
Top level (default) ▾

More Remove Done

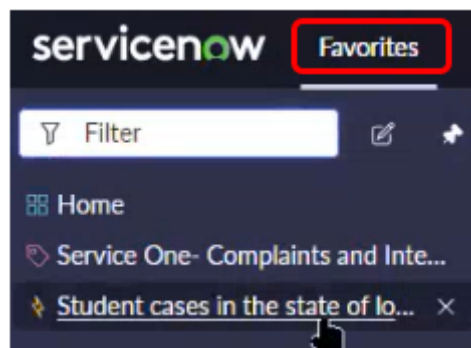
ServiceOne Using List Views and Dashboards

COMPLAINTS AND INTEGRITY MANAGEMENT IN SERVICE ONE

Select your desired colour and icon. Once done, click **Save edits** at the bottom of the page.




This list will now be saved in your **Favourites** list, which you can click on at the top left-hand side of the screen.

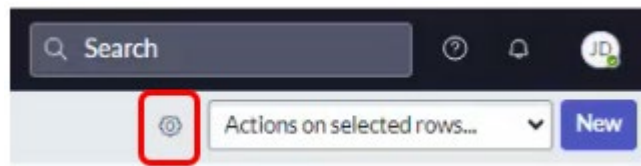


Using List Views and Dashboards

COMPLAINTS AND INTEGRITY MANAGEMENT IN SERVICE ONE

Personalise List Columns

To personalise the list columns you wish to view, click on the  icon at the top right-hand side of the screen, underneath the Search bar.

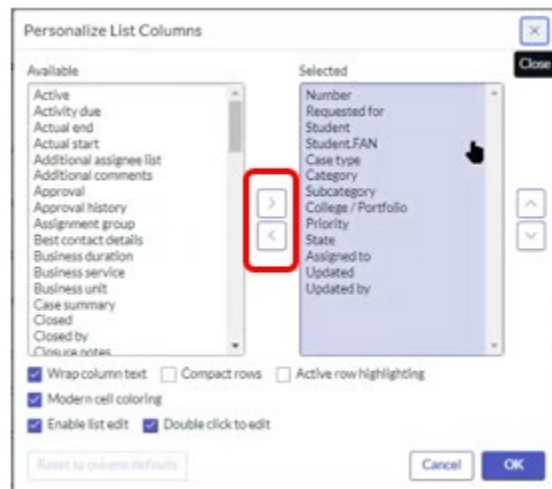


The Personalise List Columns screen will pop up.

You can click on any of the column headings in the Available or Selected lists and use the horizontal directional arrows to Add or Remove column headings.



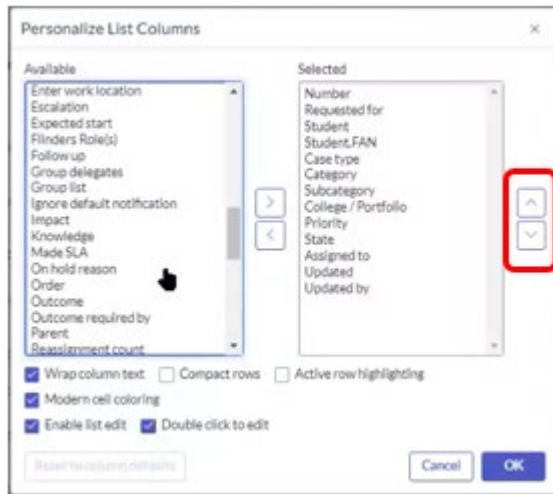
Note: The column headings which show in the Selected list are the ones you will see when you go back to your list.



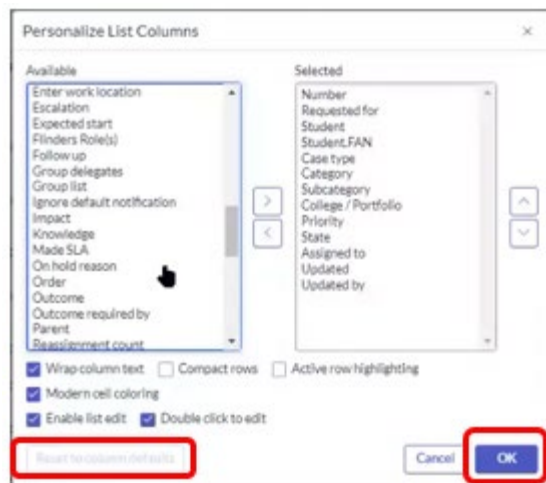
Using List Views and Dashboards

COMPLAINTS AND INTEGRITY MANAGEMENT IN SERVICE ONE

You can use the vertical directional arrows to change the order of the Selected columns.



Once you have made your changes, click OK.



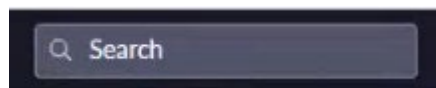
Note: If you wish to reset the column list back to default, click the **Reset to column defaults** button right at the bottom of the above screen (greyed out in above screenshot).

Using List Views and Dashboards

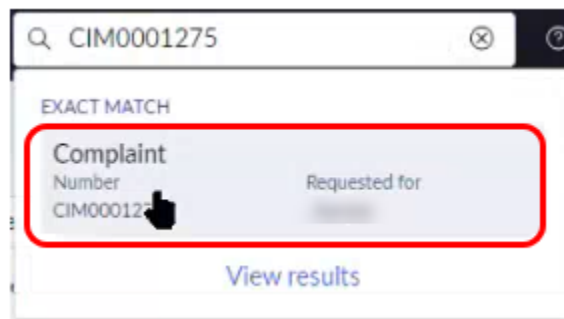
COMPLAINTS AND INTEGRITY MANAGEMENT IN SERVICE ONE

Using the Global Search function

To locate a specific case record, you can use the Global Search field at the top right-hand side of the screen.



Enter the case number and hit **Enter** or select the applicable result which will pop up underneath.



This specific case record will now appear on your screen.

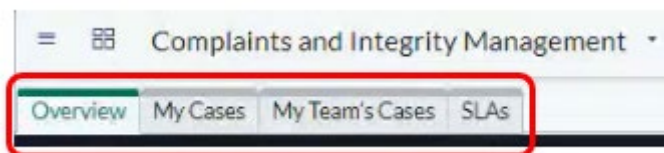
Number	CIM0001275	Submitted	07-02-2024 14:05
Pupil		Student	
Case type	Complaint	FAN	0426
Category	Assessment and grades	State	Lodged
Subcategory	Deferred or supplementary assessment decision	Priority	4 - Low
College / Portfolio	Corporate Services	Assignment group	Student Policy and Integrity Services
Business unit	Information and Digital Services	Assigned to	
Case summary			

ServiceOne Using List Views and Dashboards

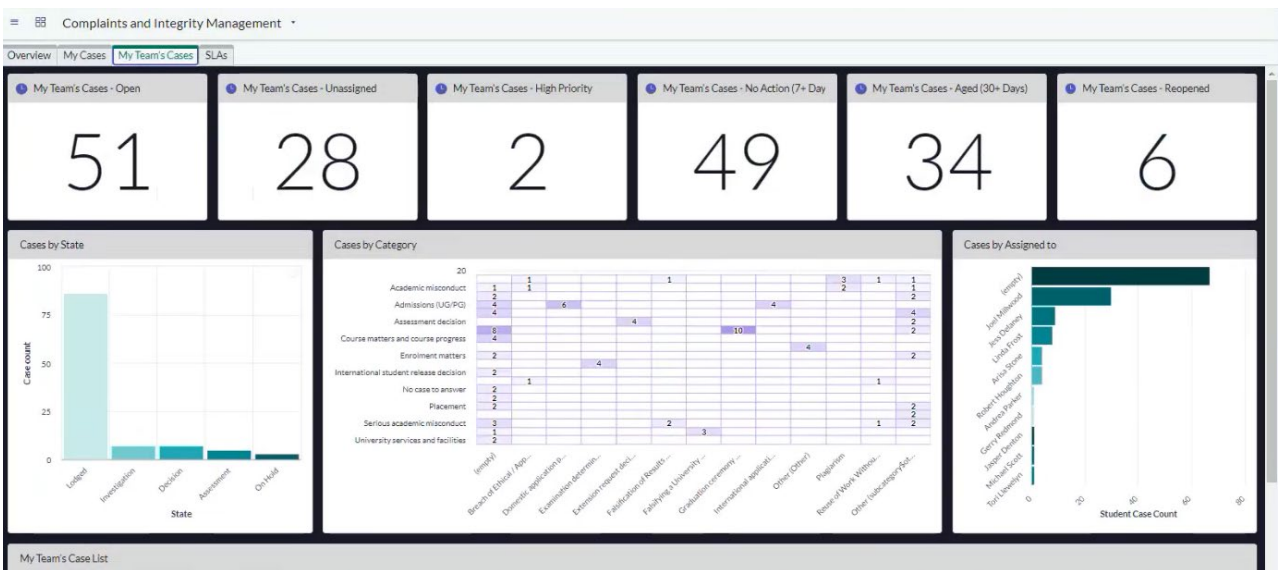
COMPLAINTS AND INTEGRITY MANAGEMENT IN SERVICE ONE

Dashboard View

Selecting the Overview option from the quick links menu, will give you a dashboard style view of cases.



This is an example of the **My Team's Cases** tab view:



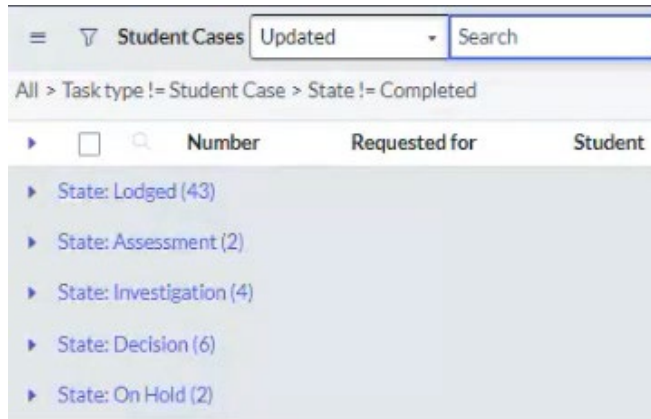
Using List Views and Dashboards

COMPLAINTS AND INTEGRITY MANAGEMENT IN SERVICE ONE

Visual Task Board View

You can open a Visual Task Board View for any list you are viewing. It is helpful to sort/group the list first, as this will provide the headings in your Visual Task Board View.

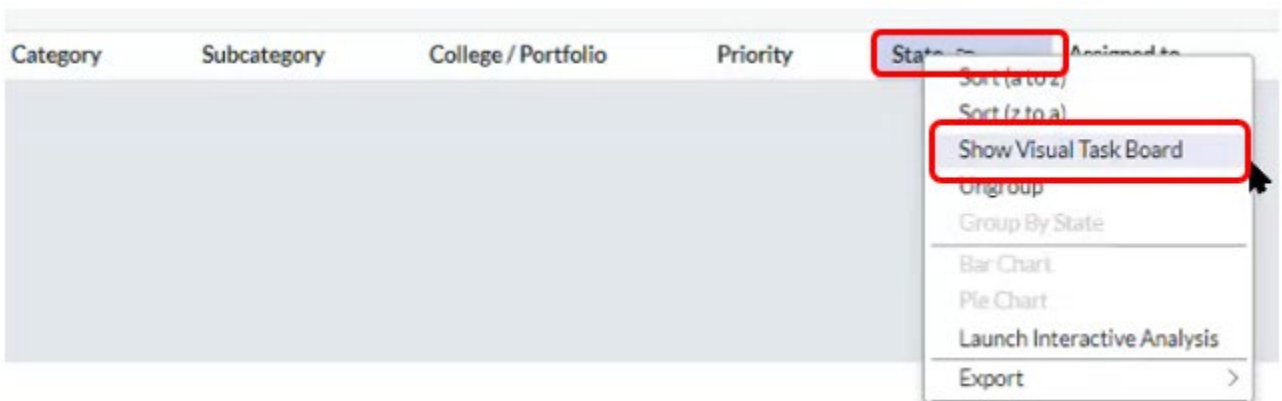
In this example the list of cases has been sorted/grouped by **State**.



Number	Requested for	Student
▶ State: Lodged (43)		
▶ State: Assessment (2)		
▶ State: Investigation (4)		
▶ State: Decision (6)		
▶ State: On Hold (2)		

Right click on the applicable column. In this example it will be the State column, as that is what we have used to sort our cases.

Then select **Show Visual Task Board** from the pop-up menu.



Category	Subcategory	College / Portfolio	Priority	State	Assigned to
<ul style="list-style-type: none"> Sort (a to z) Sort (z to a) Show Visual Task Board Ungroup Group By State Bar Chart Pie Chart Launch Interactive Analysis Export > 					


Using List Views and Dashboards

COMPLAINTS AND INTEGRITY MANAGEMENT IN SERVICE ONE

A Visual Task Board will now be displayed, with the cases listed under the relevant State headings

(i.e. Lodged, Assessment, Investigation, Proceeding, Decision, On Hold, etc).

Investigation 11	Proceeding 4	Decision 16
Review of a decision for [redacted] Unassigned CAR0001027 3h ago	Student complaint for [redacted] LF CAR0001024 17d ago	Review of a decision for [redacted] LF CAR0001046 3h ago
Review of a decision for [redacted] LF CAR0001063 24h ago	Student complaint for [redacted] Unassigned CAR0001008 17d ago	Review of a decision for [redacted] LF CAR0001066 3h ago
Review of a decision for [redacted] LF CAR0001056 3d ago	Review of a decision for [redacted] LF CAR0001055 1m ago	Review of a decision for [redacted] LF CAR0001067 3h ago
Review of a decision for [redacted] LF CAR0001057 3d ago	Student complaint for [redacted] Unassigned CAR0001015 17d ago	Review of a decision for [redacted] LF CAR0001065 3h ago
Student complaint for [redacted] AS CAR0001054 3d ago	+ Add Card	Review of a decision for [redacted] LF CAR0001064 3h ago
Student complaint for [redacted]		Student complaint for [redacted]

You can save the Visual Task Board to your Favourites list by clicking on the  icon at the top of the screen.

VTB: Student Cases by Priority 

You can change the default name of the Visual Task Board on the following screen. Then click **Done**.

Favorite added ×

Name *

VTB: Student Cases by Priority

Location

Top level (default) ▾

More Remove Done

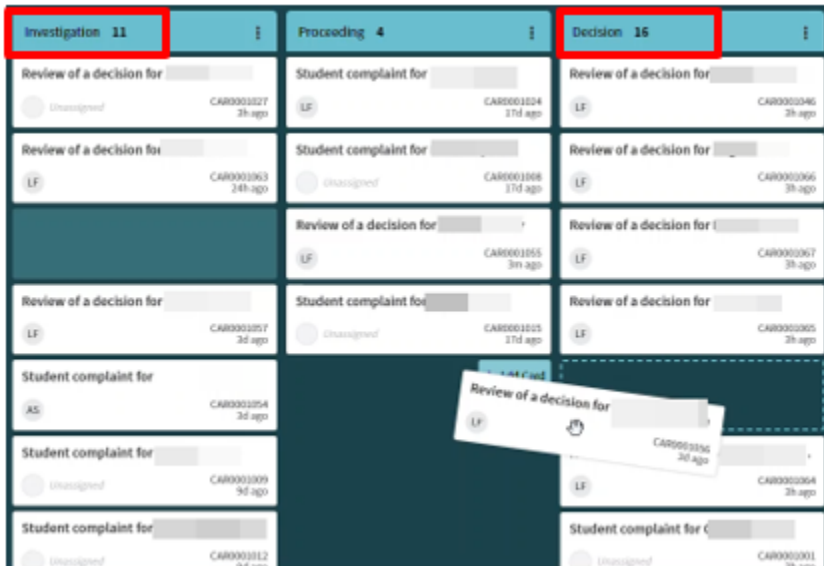
Using List Views and Dashboards

COMPLAINTS AND INTEGRITY MANAGEMENT IN SERVICE ONE

You can now navigate to that Visual Task Board view by selecting it from your Favourites list at the top of the screen.

Favorites History

Note: In the Visual Task Board view, you can click on one of the case cards and move it under a different heading, which will automatically update the State of that case (i.e. From Investigation to Decision as per below).

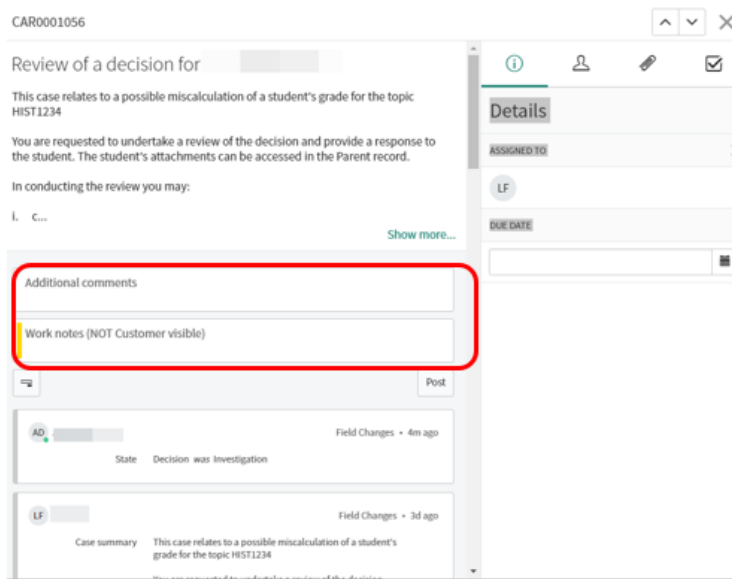


Using List Views and Dashboards

COMPLAINTS AND INTEGRITY MANAGEMENT IN SERVICE ONE

From the Visual Task Board view, you can click on any of the cards which will open a pop-up window for that case.

You can add **Additional comments (visible to the person who submitted the form in Service One)** and **Work notes (not visible to the person who submitted the form in Service One)** in this screen, if required.



CAR0001056

Review of a decision for [redacted]

This case relates to a possible miscalculation of a student's grade for the topic HIST1234

You are requested to undertake a review of the decision and provide a response to the student. The student's attachments can be accessed in the Parent record.

In conducting the review you may:

I. C...

Show more...

Additional comments

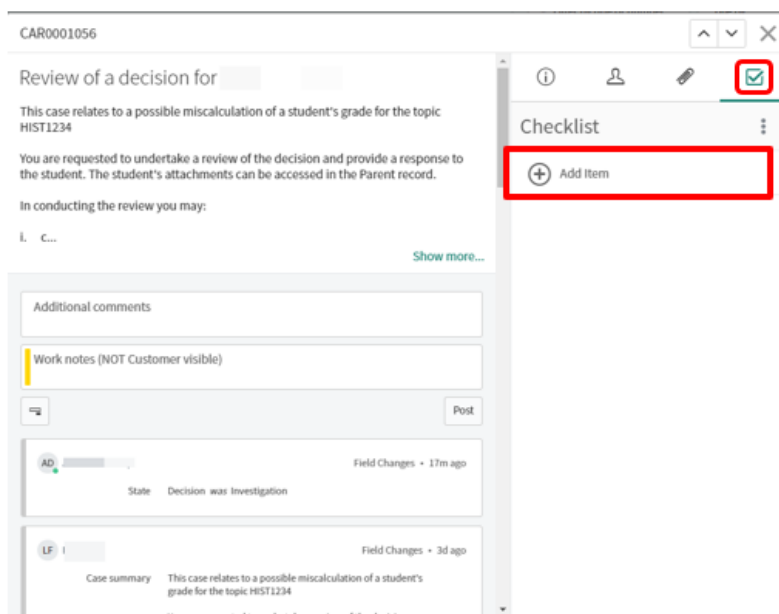
Work notes (NOT Customer visible)

Post

AD [redacted] Field Changes • 4m ago
State Decision was Investigation

LF [redacted] Field Changes • 3d ago
Case summary This case relates to a possible miscalculation of a student's grade for the topic HIST1234

If you click on the icon, you can add ad-hoc Items to your Checklist.



CAR0001056

Review of a decision for [redacted]

This case relates to a possible miscalculation of a student's grade for the topic HIST1234

You are requested to undertake a review of the decision and provide a response to the student. The student's attachments can be accessed in the Parent record.

In conducting the review you may:

I. C...

Show more...

Additional comments

Work notes (NOT Customer visible)

Post

AD [redacted] Field Changes • 17m ago
State Decision was Investigation

LF [redacted] Field Changes • 3d ago
Case summary This case relates to a possible miscalculation of a student's grade for the topic HIST1234

Checklist

+ Add Item