



# Module 3

## Navigating the By Name List

*Attribution: all stock images used in this presentation are sourced from the Centre for Homelessness Impact's free library of non-stigmatising images of people experiencing homelessness*

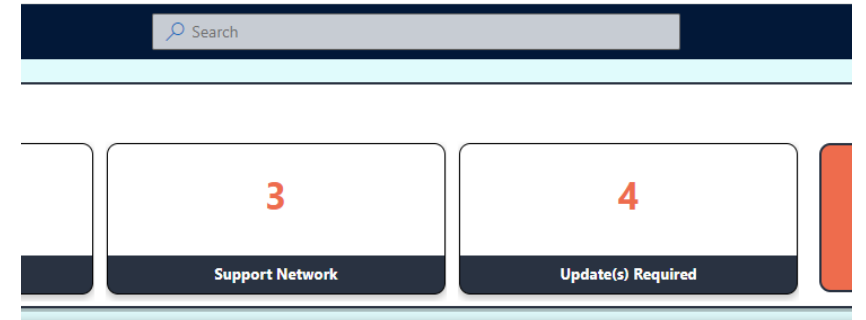
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# The Search Bar

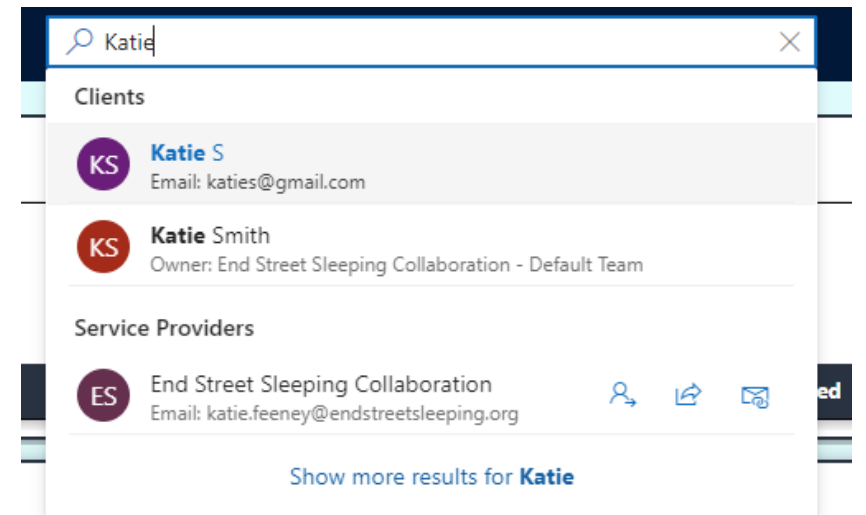
The search bar is found in the navigation ribbon at the top of the page.

The search bar is a great tool to use when you know the name of a person and would like to directly search for their record.

Use the search bar to search for a person before you add them as a new client in the By Name List.



*The search bar is found at the top of the screen.*



*Results will appear when you start typing. They are sorted by types (e.g. clients, users, and teams).*

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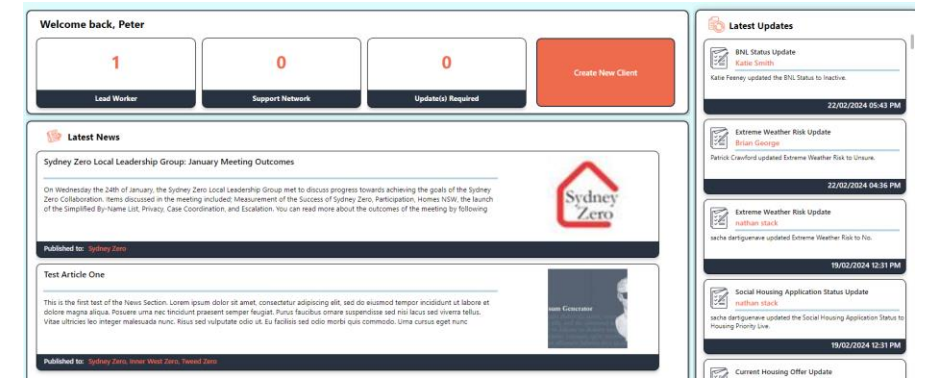
# The Homepage

The homepage has three navigation elements; your dashboard, latest updates, and latest news. They are all interactive, and you can click on any of these to navigate to the respective section.

The dashboard will navigate to the selected view.

The latest updates feed shows key updates to clients you are linked to. You can read these from the homepage or click to navigate to the client record.

Latest news articles are filtered by location. You can read these on the homepage or click on an article to navigate to the full news article.



*The homepage has three elements.*

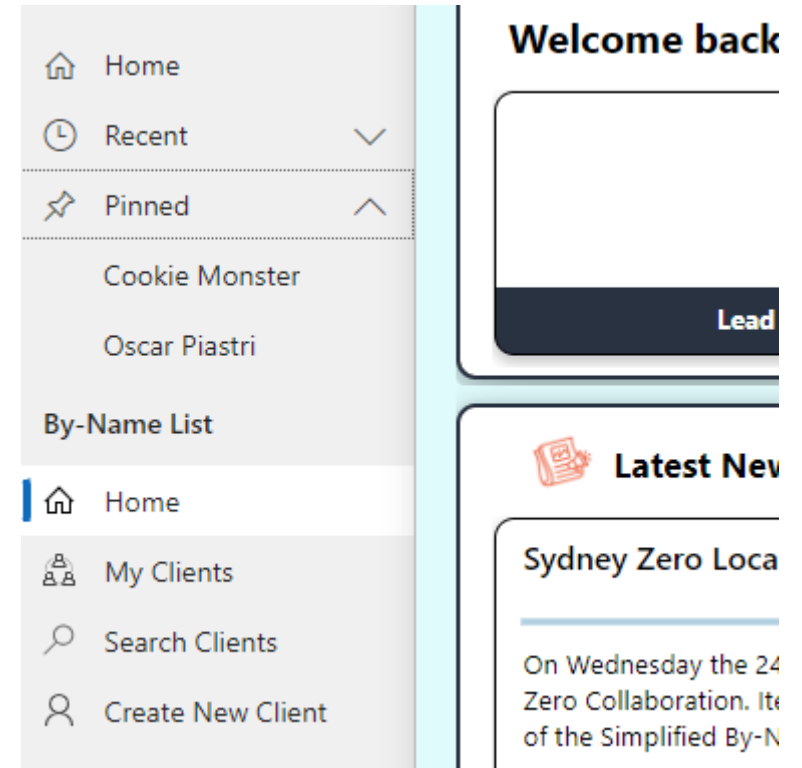
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# Using recent & pinned functionality

*Recent* and *Pinned* Lists can be found in the left-hand Navigation menu.

Your *Recent* list will show you the records you have accessed most recently. You can pin items from your *Recent* list to quickly find them. Find the record you want to pin and then click the pin icon when it appears. It will then appear in your *Pinned* list.

You can use pins for frequently accessed records, such as clients you are a lead worker for. You can pin the client record, or even a page on the detailed record!



*You can see that Cookie Monster & Oscar Piastri are pinned.*

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# Views

Views are used to filter client records into pre-defined lists. They can be accessed either through the dashboard on the homepage, or the *My Clients* button in the left-hand navigation menu.

There are 7 pre-configured views in the BNL;

1. My Clients: Clients you are the lead worker for.
2. My Coordination Group: Clients in a coordination group you are a member of.
3. My Support Clients: Clients you are a support worker for.
4. My Team: Clients being supported by your team.
5. My Zero Projects: Clients in the zero project you are a part of.
6. NSW By Name List: All clients on the NSW By Name List.
7. Update Required: Clients you are the lead worker for that require updating.

My Team ▾			
<input type="checkbox"/>	Full Name ▾	Date of Birth ▾	Suburb/Town ▾
<input type="checkbox"/>	Aaron Daniel Shanahan	7/09/1992	
<input type="checkbox"/>	Oscar Piastrri	6/04/2001	
<input type="checkbox"/>	Mark Tuan	11/09/1994	ABBOTSBURY
<input type="checkbox"/>	Adam Dalla	19/05/1969	

*The content in each view will change depending on purpose.*

NSW By-Name List ▾			
<input type="checkbox"/>	Full Name ▾	Date of Birth ▾	Housing Status (Client D
<input type="checkbox"/>	Anonymous ...	31/12/1899	
<input type="checkbox"/>	Anonymous ...	31/12/1899	Street
<input type="checkbox"/>	Michael Cope	10/09/1974	Street
<input type="checkbox"/>	Harilaos Soti...	30/09/1979	Public Housing
<input type="checkbox"/>	Luke Garven	15/06/1994	Public Housing
<input type="checkbox"/>	Jack Albert ...	25/12/2000	Public Housing
<input type="checkbox"/>	Leo D'Albora	27/05/1981	Public Housing
<input type="checkbox"/>	Aisooda Mo...	15/05/1985	
<input type="checkbox"/>	Wade Cahill	15/10/1966	Public Housing
<input type="checkbox"/>	Wade Irvine	16/07/1964	Public Housing
<input type="checkbox"/>	Damien Fitz...	13/03/1978	Crisis Accommodation
<input type="checkbox"/>	Blake Dyde	31/12/1899	Public Housing

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### Exercise

*There are lots of ways to find a client record in the By Name List.*

*Let's practice a few!*

Try out the following navigation methods;

***Search Bar:*** Search for the client Cookie Monster in the System.

***Latest Updates:*** What are the latest updates you can see?

***Pinned Clients:*** *Pin a client from your Recent List*

***Views:*** Navigate to the Sydney Zero view. How many people are there?





**Thank you**

We're here if you need us!  
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