System Navigation Bar - The Basics

The System Navigation Bar is the **topmost bar** on the eLogic Genesis home screen, and is **always accessible** during a session. When logging into your account, the tabs on the System Navigation Bar change according to your role. If you do not see one or more tabs described below, then your agency admins have disabled that tab for your role.

Click the links below to see more information about a tab on the System Navigation Bar.

- Dashboard
- People
- Places
- Classes
- Compliances [need to add link here]
- Reports
- Waitlists
- Print
- Help Center
- Global Search
- Report Tray
- User Menu

[accordion info. from below into topic list above]

Dashboard

The Dashboard tab keeps your caseload organized by displaying client events and due dates in one place.

For more information on this tab, click here. [Insert Hyperlink]

To watch a video walkthrough of how the Dashboard works, click here. [Insert Hyperlink]

People

When logging into your account, the People tab will be displayed by default. The People tab stores all personal records in eLogic Genesis, whether client or navigator records.

For more in-depth information on this tab, click here. [Insert Hyperlink]

To watch a video walkthrough of how the Dashboard works, click here. [Insert Hyperlink]

Places

The Places tab stores all Employers, Referral Agencies, and Educational Institutions that have been created in eLogic Genesis.

For more in-depth information on this tab, click here. [Insert Hyperlink]

Classes

Note: A role permission from an Agency Admin is required to view this tab.

The Classes tab makes it possible to record registrants and take attendance for any classes or training your organization offers.

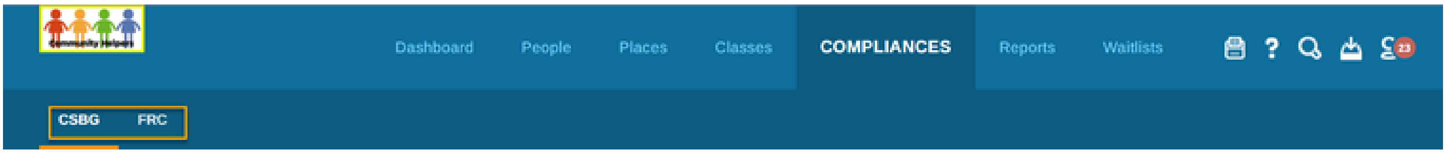
For more in-depth information on this tab, click here. [Insert Hyperlink]

To watch a video walkthrough of how the Dashboard works, click here. [Insert Hyperlink]

Compliances

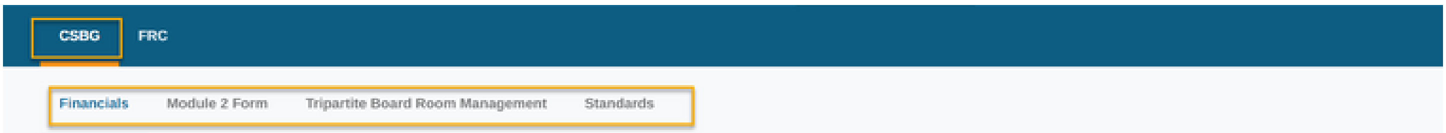
The Compliances tab stores data about **CSBG** and **FRC** compliances.

Note: A role permission from an Agency Admin is required to view this tab.



In Compliances, the most frequently used subtabs are shown first. Agency admins can control permissions for the different subtabs separately.

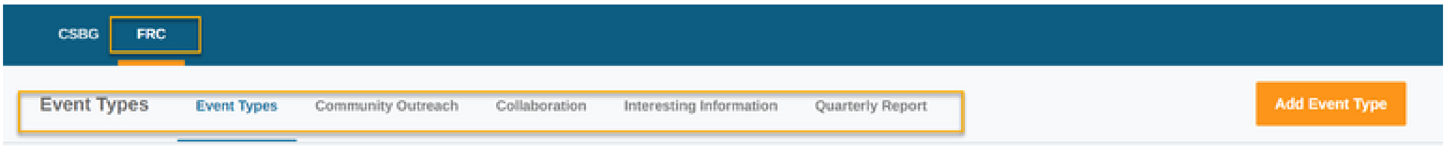
Under the CSBG subsection, you'll see Financials data, Standards data, the Module Two Form and the Tripartite Board Manager [insert hyperlinks].



For instructions on completing the Module Two Form, click here.

[insert screenshot?]

Under the FRC subsection, you can find data about Event Types, Community Outreach initiatives, Collaboration efforts, Quarterly Reports and any additional Interesting Information [insert hyperlinks].



Reports

The Reports tab stores organization-level reports such as System Reports, Custom Reports spreadsheets and statement-based Ad Hoc Reports.

For more information on this tab, click here. [Insert Hyperlink]

Waitlists

The Waitlists tab stores your agency's Global Invitation (Client Portal only) and Program Waitlists (as established by an Agency Administrator).

For more information on this tab, click here. [Insert Hyperlink]

Print

The Print icon appears to the right of the Waitlists tab. Click on the Print icon to print the current screen.

Help Center

The Help Center icon appears as a question mark to the right of the Print icon. Click on the Help Center icon to visit the Help Center homepage.

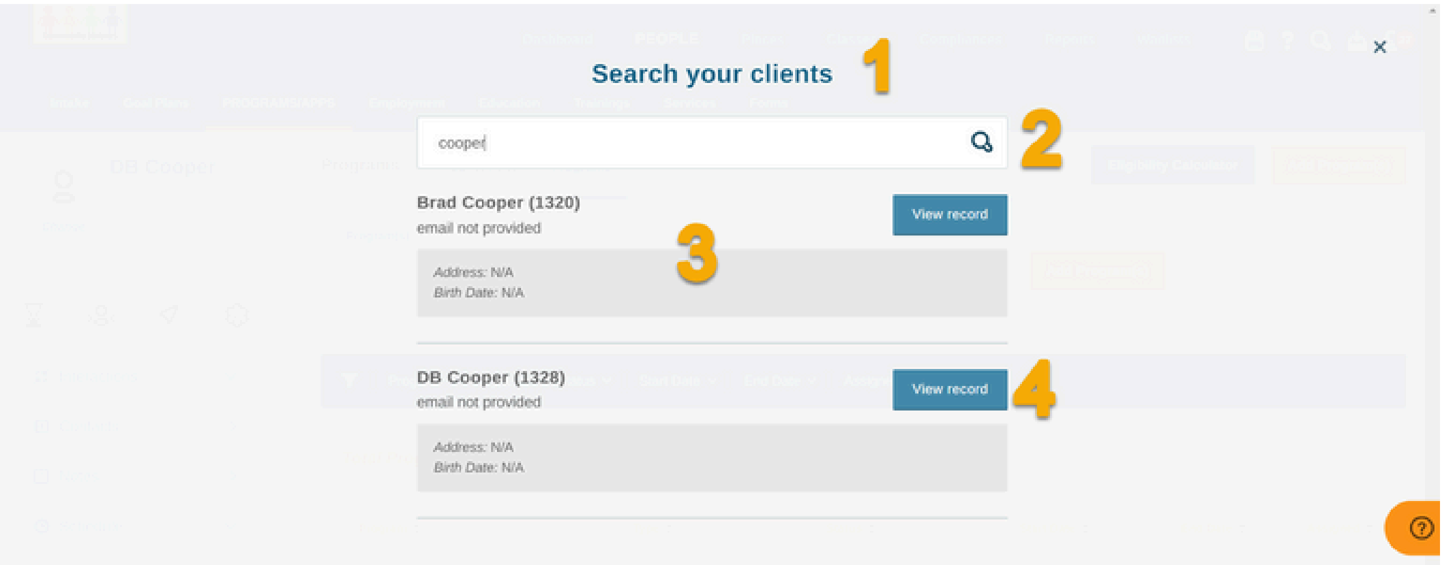
From the Help Center homepage, you can search for instructional articles or videos by both keyword and category. You can also submit help tickets for review by eLogic Genesis User Support.

Global Search

[So, I came upon another article that has similar info: https://elogicgenesis.zendesk.com/hc/en-us/articles/360050171193-How-do-I-locate-a-record-. The info from there (which would require me to add more screenshots for the steps?) could be added to this section since that's what it's about, and maybe that article could be archived. What do you think?] -Yes

The Global Search symbol (magnifying glass) is the third icon on the system navigation bar, and it is used for finding client or navigator records. When you click on the icon, a screen overlay prompts you to enter specific criteria for locating different records.

How to locate a record:



1. Click the Global Search icon - *a screen overlay will appear.*

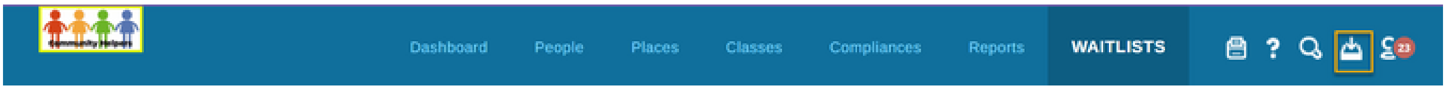
1. Enter any of the search criteria below:
    - First name
    - Last name
    - Display name
    - Address
    - Phone number
    - Case number
    - Birth date
    - Email address (as it is entered in the record)

3. The overlay will display all client and navigator records with matching information below.

4. Click **View record** to open the record.

Click here [insert hyperlink] to watch a video walkthrough of how the Global Search Feature works.

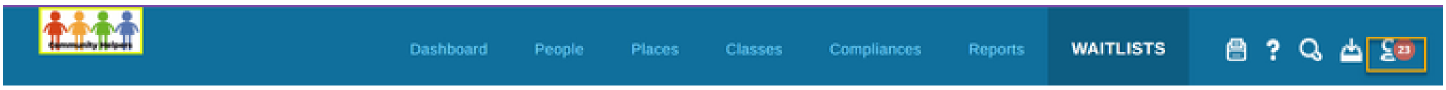
Report Tray



The Report Tray icon appears as a tray symbol to the right of the Global Search icon. The Report Tray icon will display a notification when it is time to run any Custom or Ad Hoc reports that have had a reminder set.

Read more about Save Reports here. [insert hyperlink]

User Menu



The User Menu appears as a user symbol to the right of the Reports Tray icon. Click on the User Menu icon to view any notifications or outstanding referrals. You'll also see a dropdown menu you can use to change your password, create a personal note, view your calendar or log out of eLogic Genesis.

Read more about the User Menu here. [insert hyperlink]