

INSIGHT SITE ADMINISTRATOR MANUAL

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MCLENNAN COMMUNITY COLLEGE
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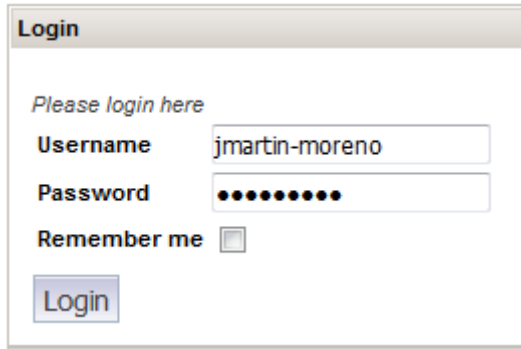
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Creating a New Care Area

1. Log into Insight at <https://mclennan.pharos360.com> using your first initial and last name in all lowercase letters. Your password is your usual password at MCC.



Login

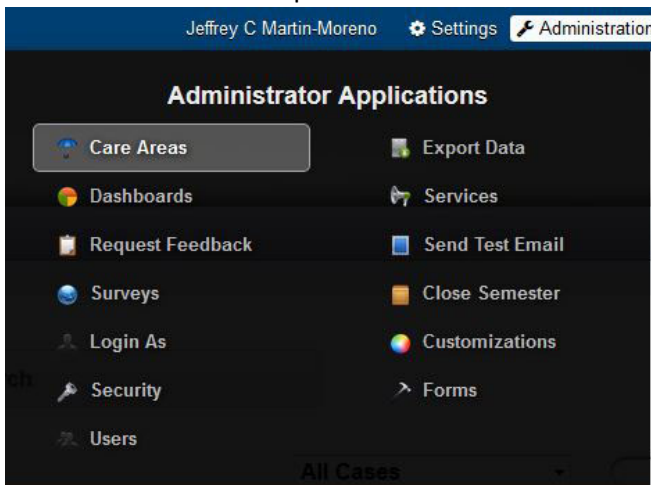
Please login here

Username

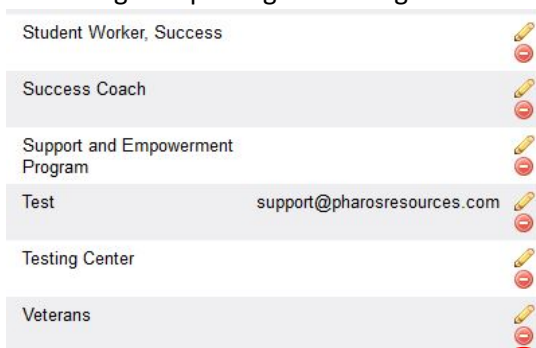
Password













Remember me


2. Hover over Administration near the top right of the page (to the right of your name) and click on Care Areas from the dropdown menu.



3. Scroll to the bottom of the list of Care Areas
4. In the blank fields provided, type the name of the new Care Area and leave the email field blank.
5. Click the green plus sign to the right.



Student Worker, Success	 
Success Coach	 
Support and Empowerment Program	 
Test support@pharosresources.com	 
Testing Center	 
Veterans	 

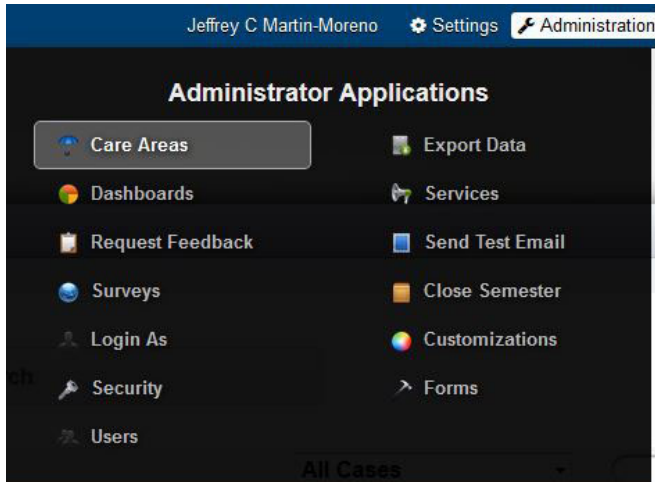
#4  #5

6. Congratulations! You have just created a new Care Area.

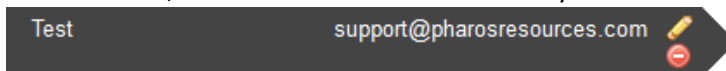
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Managing Users in a Care Area

1. While logged into Insight (see login instructions in the previous section), hover over Administration near the top right of the page (to the right of your name) and click on Care Areas from the dropdown menu.



2. To add a user, click on the Care Area to which you wish to add users.



3. In the blank field below the names of the users for that Care Area, search for the person you wish to add. You can search by MCC ID number or MCC email address. MCC email addresses are *usually* the person's first initial and last name in all lowercase letters.
4. When the person's name appears, click on their name.
5. Click the add button to add the user to the Care Area.



6. Designate the person as an Advocate, a Manager, or both by clicking the X or ✓ in the appropriate column(s).
7. To delete a user from a Care Area, click the minus button to the right of the user's name.



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Editing or Deleting a Care Area

Use caution in editing or deleting a Care Area. Editing the name or deleting a Care Area will make it difficult or impossible to retrieve any prior data for that department. Rather than edit the name of a care area, creating a new Care Area is recommended, adding the users to the new Care Area, and removing them from the old one so it is no longer accessible to users but the historic data remains available.

1. You must be designated as a manager of a Care Area to be able to edit or delete that Care Area (see Editing Users in a Care Area).
2. While logged into Insight, scroll to the Care Area you wish to edit or delete.
3. To edit a Care Area, click the pencil icon to the right of the Care Area name.

New Department



4. Make the needed changes. Then, click the “Update” button.

Editing New Department

Name:

Email:

5. To delete a Care Area, click the minus button to the right of the Care Area name.

New Department



6. After reading the warning about the consequences of deleting a Care Area, if you are certain you want to delete, click “OK.”

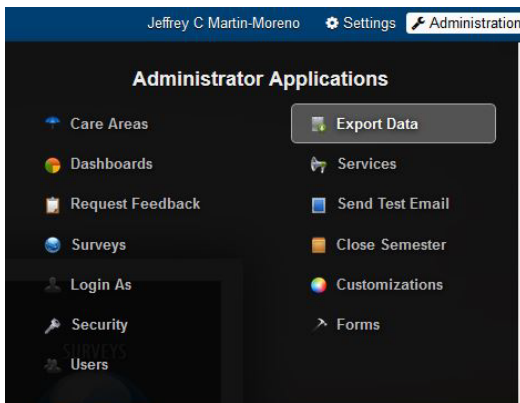
WARNING: Deleting a Care Area will remove all users and students associated with this Care Area. However, currently open cases in this Care Area will still be accessible to the assigned Advocate.

Are you sure you wish to delete this Care Area?

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Exporting Activity Logs

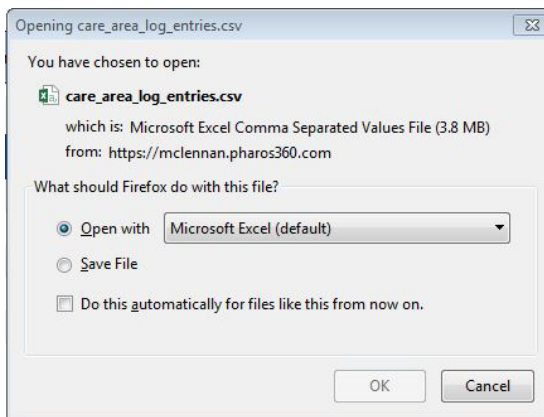
1. While logged into Insight, hover over 'Administration' (or 'Management' depending on your role) and click on 'Export Data' from the drop down menu.



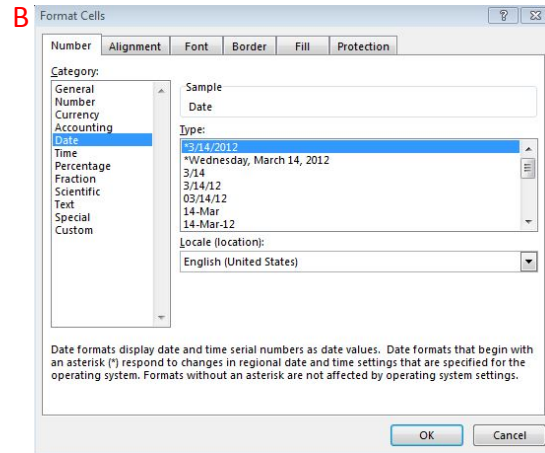
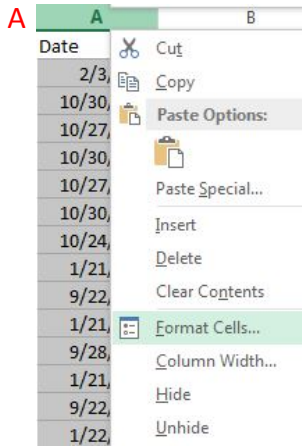
2. In the 'Export Log Entries,' select your care area.
3. Click on the Excel icon below Actions.



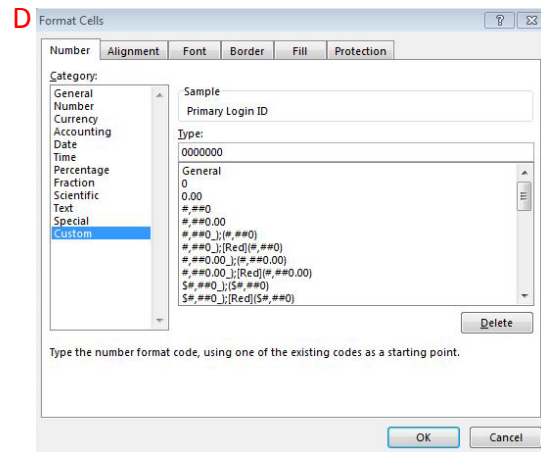
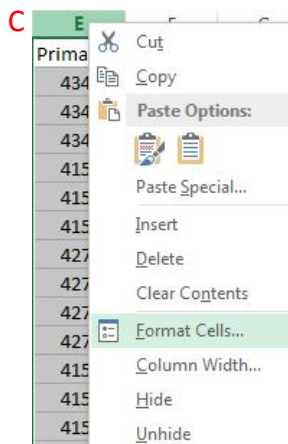
4. On the next dialogue box, open the file with Excel or save the file. The file will open in Excel in .csv format. Save it in Excel Workbook or Excel 91-2003 Workbook format.



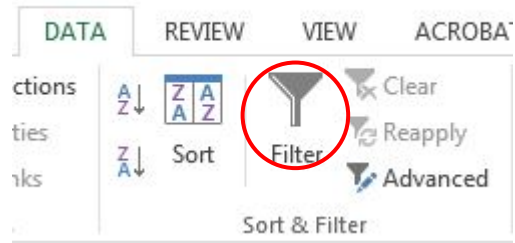
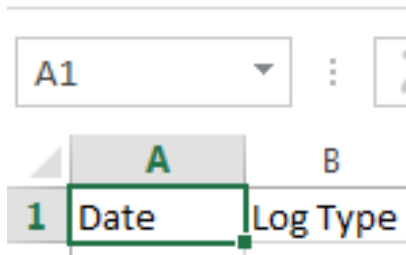
5. Once the downloaded file is saved in an Excel format, you will need to make some formatting changes before using the log.
 - a. Right-click on the column letter for column A to select the entire column and open options for that column and select Format Cells.
 - b. On the Number tab in the Format Cells dialog box, choose Date as the category and select the first formatting type (*3/14/2012).



- c. Right-click on the column letter for column E to select the entire column containing the student ID numbers and open options for that column and select Format Cells.
- d. On the Number tab in the Format Cells dialog box, choose Custom as the category and type the number zero 7 times in the Type field. The, click OK. This will add the leading zeroes to the ID numbers.



- e. Select cell A1 by clicking on it. Then, in the Data ribbon, click the Filter option. This will make all columns filterable so you can filter by Date range, Log Type, Sub Type, Author, or Student Name.

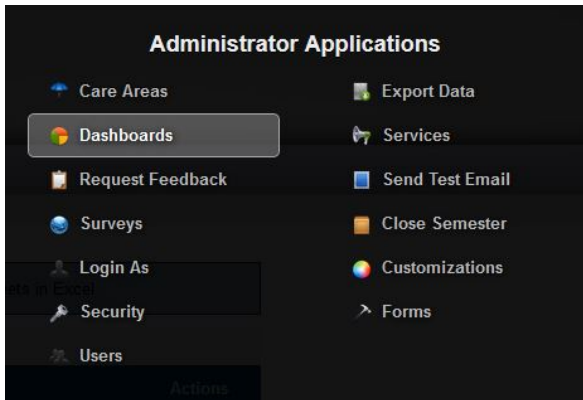


- f. Adjust the column widths and if you like, change column headings and column order by selecting the column you want to move and cutting and pasting it to a different location. You may also choose to eliminate columns that are not pertinent to you.

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Using the Data Dashboard

1. While logged into Insight, hover over 'Administration' (or 'Management' depending on your role) and click on 'Dashboards' from the drop down menu. The charts on this page may be blank until you have chosen criteria to show.



2. Set the criteria for the data you want to be displayed in in the dashboard charts.
 - a. In the Show field, select the type of data you want displayed.
 - b. In the Care Area field, select your care area (administrators can view any or all departments, managers can view only departments they manage).
 - c. Type the date range for the data you want to include and click Go.

A screenshot of the 'Dashboards' filter interface. It shows a header 'Dashboards' and a filter section. The filter section has three main components: a 'Show:' dropdown menu set to 'Cases' (labeled 'A'), a 'Care Area:' dropdown menu set to 'All Care Areas' (labeled 'B'), and a date range selector set to 'from Today, Yesterday or this Week, Month, Year or 11/17/2015 to 11/17/2015' with a 'Go' button (labeled 'C').

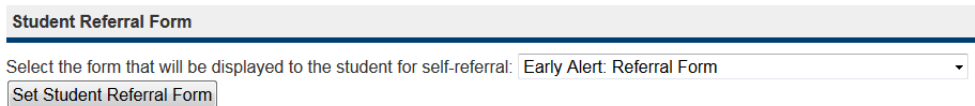
3. Your results will vary depending on the date range, number of advocates in the care area, and the number of cases/referrals that department receives. All of the charts may populate or some may say there is not enough data to render the chart.



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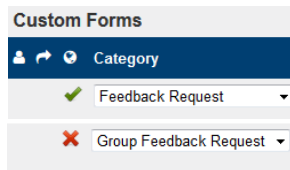
Managing Forms

Creating and maintaining custom forms in Insight is a function of the site administrator(s). Care Area managers may request a new form to be added to the system by providing the administrator with the type of form they want and the text of the form.

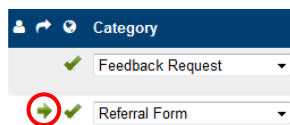
1. The first option on the Manage Forms page is setting the Student Referral Form. The selected form is Early Alert: Referral Form. It is recommended not to change this setting. Instead, it is best to edit the form as needed. If this is changed, only Pharos 360 tech support can reset it to the correct form.



2. There are five types or categories of forms:
 - a. Referral Form – The referral form is used by faculty and staff to refer students, or for students to refer themselves for assistance on our campus. It is a best practice to route all referrals to the Early Alert care area to be triaged and forwarded to other departments as appropriate. It is also a best practice have only one referral forms. Making additional referral forms available may cause confusion for users about which form to use.
 - b. Student Update – This form is used by Care Areas (departments) to provide an update to individuals on campus interested in the student’s progress such as their instructors or advisors.
 - c. Feedback Request – This form can be used to request feedback from a student or from the student’s instructor(s).
 - d. Group Feedback Request – This type of Feedback Request is designed to send to small groups (e.g. all instructors of all students uploaded to a care area).
 - e. Survey – This is similar to a Group Feedback Request but is intended for a wider audience. One advantage of surveys is that you can provide the survey schedule to Pharos support and they will set the survey to open and close on given dates.
3. To enable or disable a form click the  or  in the appropriate column below the globe.



4. A green arrow to the left of the form indicates that the form is routed directly to a care area when submitted and does not need to be forwarded by the administrator.






5. To duplicate a form click on the copy icon  in the Actions column on the right. This can be useful when creating a new form that is similar to an existing form. The new form just has to renamed and edited as needed.
6. To delete a form click on the delete icon  on the right.
7. To edit an existing form click on the edit icon  on the right.


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Creating and Editing Forms

1. From the Manage Forms page, scroll to the bottom of the existing forms. In the blank fields provided give the new form a title and subtitle. The subtitle should give a description of the use of the form. Then, click the add icon.


Title Subtitle 

2. Now look for the new form in the list of available forms. The category for the new form will be blank and the new form will not be active (indicated by a red x).



3. Select the type of form you want to create from the dropdown field.

Referral Form
Student Update
Feedback Request
Group Feedback Request
Survey


4. Click the edit icon  to the right of the form subtitle to edit the form.
5. In the form editor, edit the title and subtitle as needed.

Form Title:

Form Subtitle:

Include information that will specify the intended use of this form. (Required).

6. Select the department to which the form will be routed. *This option is only available for Referral and Student Update forms.*


 Routing

Automatically route this Referral/Student Update response to the manager of a specific Care Area:

Manager will receive email notification.

Leave blank to disable forwarding.

7. If you want responses to the form to be sent directly to the student check the Direct Student Notification box.

 Direct Student Notification


This Referral/Student Update response will be sent directly to the student upon submission.

Send this response directly to student

A copy will be sent to the administrators.

8. Click the Add a question button to add a question to the form.

9. Select the type of question you want to add

10. Edit  the question text and add a report identifier that will become the field name when the data collected from the form is exported at a later date.

1) EDIT ME - Question Text

11. Choose whether the user will required to answer the question.

Required: No Yes

12. For multiple choice questions only, check whether the choices will be displayed as radio buttons or as a dropdown.

Display As: Radio Buttons
 Drop Down

13. For free form questions only, you may indicate how many rows long and answer can be. If you leave this field blank users can enter as long a comment as they like.



Rows


14. For multiple choice and checkbox questions, add as many choices as you want to make available. For multiple choice questions, users can choose only one answer. For checkbox questions, users can check all answers that apply.

15. Edit each choice and give it an identifier for reports.

2) EDIT ME - Question Text

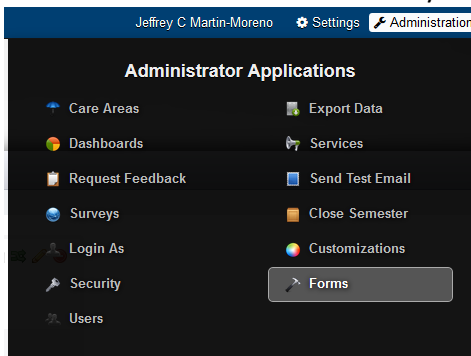
EDIT ME - Choice Text

16. To save changes to a question or answer click the  icon. To exit editing without saving the question or answer click the  icon.



17. To eliminate a question or answer click the  icon.

18. To change the order of question or answers click and drag the item using the  icon.

19. After all of the questions and answers are satisfactory, navigate back to the Manage Forms page from the Administration menu or by clicking Manage forms in the path at the top of the page.



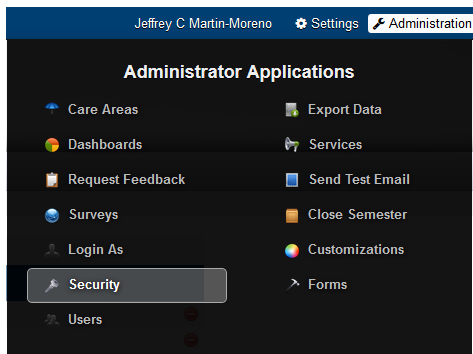
[Home](#) / [Administration](#) / [Manage Forms](#) Editing New Form

20. Click the  to the left of the form to make it active .

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Managing Security

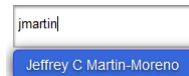
1. While logged into the Insight system navigate to the Manage Security page from the administration menu.



2. Use the Administrators section to add and remove site administrators.

Administrators	
User	E-mail
Pharos Maintenance (pharos.maintenance)	webmaster@pharosresources.com
Jeffrey C Martin-Moreno (0013767)	jmartin-moreno@mcclennan.edu

3. To add a new administrator type the person's MCC ID number or start typing their email address. When the person's name appears click on the name.



Then click the icon to add them to the administrator list.

4. Use the Care Area Privileges area to set what student information will be available to each Care Area by clicking on the or to toggle between adding and removing access.
5. No one has been given access to Risk Level at this time because MCC has not yet chosen to utilize this tool. If we decide to utilize it in the future, arrange a GoToMeeting by contacting the Client Relationship Coordinator (currently Rachel Elam) at relam@pharosresources.com or support@pharosresources.com.

Student Risk Display Rules			
Name	Color	Minimum	Maximum
Example Rule: 1-3		1	3
You may add additional rules and delete examples as you please		4	7
Note the red and green icons on the far right, as well as the color swirl next to the grey color below		8	10

6. Use the Search Privileges area to determine what search criteria each role can use to search for a student and the information that will appear when they locate a student in a search.

Search Privileges						
Search Criteria	Administrator	Manager	Troop	Faculty	User	Student
Student ID	✓	✓	✓	✓	✓	✓
Student ID (Secondary)	✓	✓	✓	✓	✗	✗
Student Name	✓	✓	✓	✓	✗	✗
Student Email	✓	✓	✓	✓	✗	✗
Case Status	✓	✓	✓	✗	✗	✗
Case Counselor	✓	✓	✓	✗	✗	✗
Case Care Area	✓	✓	✓	✗	✗	✗
Search Results						
Student ID	✓	✓	✓	✓	✓	✓
Student ID (Secondary)	✓	✓	✓	✓	✗	✗
Student Name	✓	✓	✓	✓	✗	✗
Student Email	✓	✓	✓	✓	✗	✗
Student Currently Enrolled	✓	✓	✓	✓	✗	✗
Student Last Referred	✓	✓	✓	✓	✗	✗
Case Care Area	✓	✓	✓	✓	✗	✗
Case Last Updated	✓	✓	✓	✓	✗	✗
Number of Open Cases	✓	✓	✓	✓	✗	✗
Number of Closed Cases	✓	✓	✓	✓	✗	✗

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