University of Tennessee
COI Quick Guide General Dashboard Navigation and Filtering/Sorting Data

Target Audience – This guide is useful for supervisors reviewing their teams' certifications, COI committee members, and COI administrators.

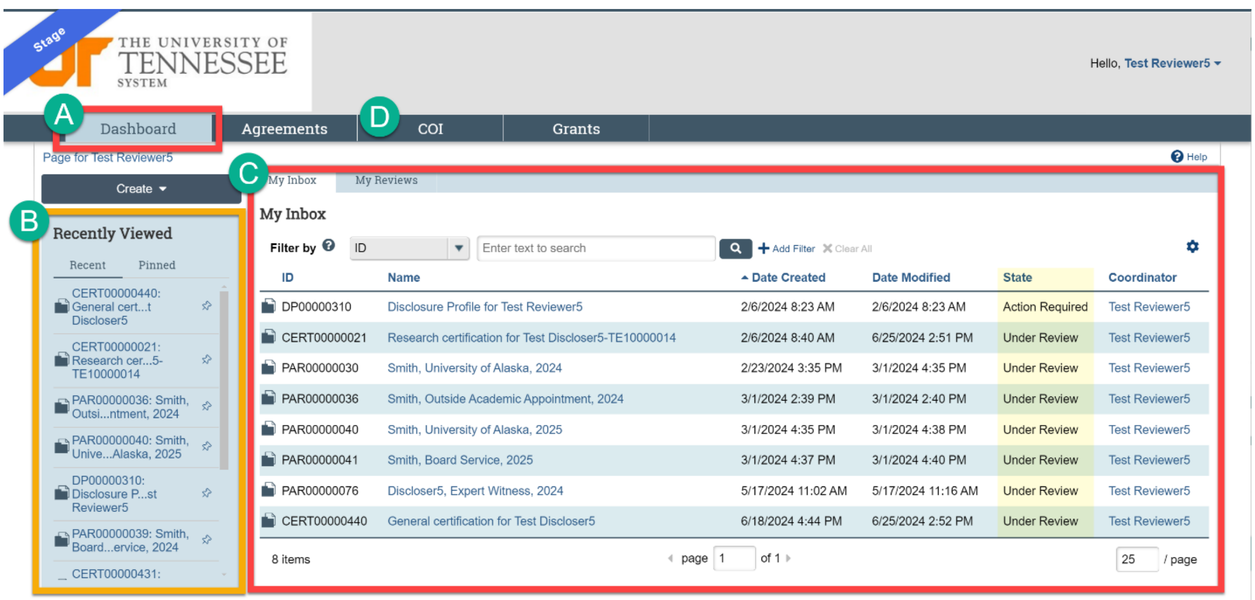
Purpose – The guide demonstrates navigating your Dashboard). Use the filter and sort functions to help complete your COI tasks.

How to use – The guide will list labels as shown in the application in bold. A bold and italicized label in the instructions is your indication to make that selection.

Main screen areas:

The COI system will default to the **Dashboard (A)** on your first login.

On the left is the **Create (B)** dropdown menu, which expands to show all UT-purchased HURON modules as they are implemented. The right side of the screen lists items currently in your **INBOX (C).**

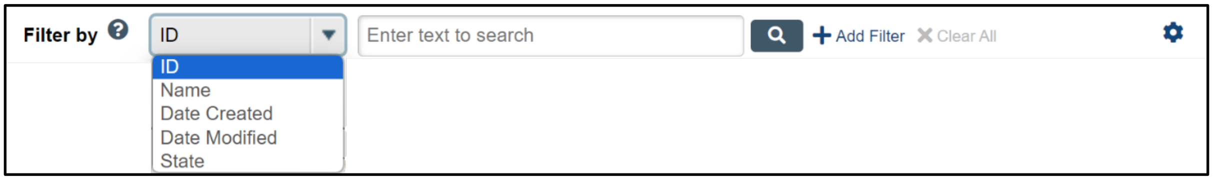


A. **Dashboard** – quick link to your **Recently Viewed** records and **My Inbox**.
B. **Recently Viewed** – The left navigation lists the most recently viewed records. The pin to the right of an item can be used to pin records for quick access. They will appear under the **Pinned** list tab of Recently Viewed. Clicking the pin again will remove the item from that list.
C. **My Inbox** – lists all items needing attention.
   My Reviews – filtered list of records assigned to you for review.
D. **COI** – quick navigation to the DASH Research HURON COI module.

Filter/Sort data

Many pages contain tables you can filter and sort to help you find the required data. Filtering reduces the list to only the data that meets the selected criteria.

Using the down arrow selector next to **Filter By,** choose the **column** you wish to filter. The menu lists only the columns available for filtering.



a. **ID** – system-generated numbers such as DP00000340 (disclosure profile), PAR0000040 (pre-approval request), PLAN0000040 (management plan), etc.
b. **Name** – the name/title of the record.
c. **Date Created** – date the record was created.
d. **Date Modified** – date the record was modified.
e. **State** – status of the record (Under Review, Committee Review, etc.)

In the **text box**, type the beginning characters for the items you want to find. If you do not know the beginning characters, type a % symbol as a wildcard before the characters. Examples:

CE shows all items beginning with CE in the ID column.

%71 shows all items containing 71 in any position of the ID column

2. Click the ***magnifying glass*** icon to apply the filter. The table shows only rows that are exact matches.
3. Below are the ***My Inbox*** search columns designated in blue. The column sorted has the down arrow to the right of the column sorted.

A common task on this screen is to look for a particular person's name. In this case, you would select ***Name*** in the drop-down and enter the desired name with the wildcard character in front, e.g., %Smith.