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)**.

51090 THE UNIVERSI TENNESS SYSTEM	TY OF SEE				F	lello, Test Reviewer5
Dashboard Page for Test Reviewer5	Agreements	COI Grants				😧 Help
Recently Viewed	My Inbox Filter by 😧 ID	Enter text to search	۹ 🕂 Add Filter 🗙 Clear	All		۵
Recent Pinned	ID	Name	- Date Created	Date Modified	State	Coordinator
CERT00000440: ■ General certt	DP00000310	Disclosure Profile for Test Reviewer5	2/6/2024 8:23 AM	2/6/2024 8:23 AM	Action Required	Test Reviewer5
CERT00000021:	CERT00000021	Research certification for Test Discloser5-TE10000014	2/6/2024 8:40 AM	6/25/2024 2:51 PM	Under Review	Test Reviewer5
Research cer5- 🖈 TE10000014	PAR00000030	Smith, University of Alaska, 2024	2/23/2024 3:35 PM	3/1/2024 4:35 PM	Under Review	Test Reviewer5
PAR0000036: Smith,	PAR00000036	Smith, Outside Academic Appointment, 2024	3/1/2024 2:39 PM	3/1/2024 2:40 PM	Under Review	Test Reviewer5
Outsintment, 2024	PAR00000040	Smith, University of Alaska, 2025	3/1/2024 4:35 PM	3/1/2024 4:38 PM	Under Review	Test Reviewer5
UniveAlaska, 2025	PAR00000041	Smith, Board Service, 2025	3/1/2024 4:37 PM	3/1/2024 4:40 PM	Under Review	Test Reviewer5
DP00000310:	PAR00000076	Discloser5, Expert Witness, 2024	5/17/2024 11:02 AM	5/17/2024 11:16 AM	Under Review	Test Reviewer5
Reviewer5	ERT00000440	General certification for Test Discloser5	6/18/2024 4:44 PM	6/25/2024 2:52 PM	Under Review	Test Reviewer5
■ Boardervice, 2024	8 items	∢ p	age 1 of 1 ⊩			25 / page

- 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

University of Tennessee

COI Quick Guide General Dashboard Navigation and Filtering/Sorting 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.

Filter by 😮	ID 🔻	Enter text to search	Add Filter 🗙 Clear All	\$
	ID			
	Name			
	Date Created			
	Date Modified			
	State			

- 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.

Filter by 😮	ID	•	CE	٩	+ Add Filter	X Clear All

%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.

•					
Filter by 🔮	Name	•	%Smith	Q	+ Add Filter X Clear All

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.