Dashboard Features
User Guide
All Users
Version 2.0
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COLUMN SORTING AND FILTERING

Many actions can be performed just by clicking on a column heading. This allows for sorting and the ability to select a value to create a quick filter.

1. **Column Sorting**

   The results that are displayed in your “Dashboard” have columns (i.e., **ID#**, **Process Type**, **Action Item**, **SPO**, etc.) that are sorted into line items, or rows. These results are sorted by default in **ascending** chronological order by date.
   
   a. To sort from a different column other than by the default order of the latest transaction date, click on a column. (i.e, “**Sponsor**”)
      
      i. A menu will appear
   
   b. Select either the **UP** arrow (which will sort by ascending order) or the **DOWN** arrow (which will sort by descending order)
      
      i. An arrow will appear next to the column you have selected.
2. **Create a quick filter**

Filters allow you to display rows that meet particular criteria.

a. From your “My Action Items” tab, click on “Actions”.

b. Select “Filter”.

c. Selecting “Column” from the radio buttons will allow you to select from a drop down list to organize your filters based on your requirements.

   i. The drop down list from the “Column” menu allows you to select from the available columns to filter by (i.e., “ID#, Process Type, Action Item”, etc.)

   ii. The options that the “Expression” menu displays will show ONLY what’s on your Dashboard.

   1. (Ex: if you choose “Sponsor” with an “Operator” of “Like”, the “Expression” will only filter the process types from the transactions listed therein).

d. Click “Apply”.

![Image of filter interface with examples]
Dashboard will now be reflective of the requirements that have been chosen.
   i. Note that you may also apply more than one filter.

HIDE A COLUMN

1. From your “My Action Items” tab, select the column you would like to hide (ex: “Process Type”).
2. Click the icon with the red ‘X’, and the selected column is now hidden.

CREATE A CONTROL BREAK

1. From your “My Action Items” tab, click on “Actions”.
2. Select “Format” from the menu, then “Control Break” from the next menu that populates.
3. A “Control Break” menu displays, which you then have the ability to select columns that you wish to have enabled or disabled.
4. You may choose or change the sorting order by using the numbered columns.
5. Click “Apply”.

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6. Your new report will display based on the columns selected and in what order you have selected.

7. If you no longer would like to have these columns broken down in this manner, you may click on the red ‘X’ next to the column titles.

   ii. **Note that unselecting the checkboxes will no longer sort with those columns, however, clicking the ‘X’ will remove the filter completely.**
SEARCH BAR

Allows for quick searching of the data, changing the number of rows displayed, and invokes the “Actions” Menu. Searches here will go against all text data in every column.

1. In the free text field, type in a search term that you are specifically looking for contained within your “Action Items” tab (ex: NIH).
   a. You can also search on a specific column by using the magnifying glass drop down menu to select a column to search on.

2. Click “Go”.

3. Dashboard will now be reflective of the search terms that have been entered.

4. To delete the filter, click on the red ‘X’.
   i. Note that unselecting the checkboxes will no longer sort with those columns, however, clicking the ‘X’ will remove the filter completely.
SELECT COLUMNS

Select Columns is used to modify the columns displayed.

1. Selecting/Unhiding a column
   a. From your “My Action Items” tab, click on “Actions”.
   b. “Select Columns” window displays with a “Do Not Display” and a “Display in Report” column.
      i. The columns on the right are the ones displayed on your report. The columns on the left are hidden. Use the arrows in the middle to move columns back and forth. You can reorder the displayed columns using the arrows on the far right.
   c. Click “Apply”.
   d. Dashboard will now be reflective of the columns that have been selected for viewing or have hidden.
FORMAT: HIGHLIGHTING
Highlighting allows you to define a filter. The rows that meet the filter are highlighted using the characteristics associated with the filter.

1. Highlight an entire row
   a. From your “My Action Items” tab, click on “Actions”.
   b. Select “Format”.
   c. Select “Highlight”.
   d. Name your “Highlight” (ex: IRB).
   e. In “Highlight Type”, select either “Row” or “Cell”.
   f. In “Background Color” and “Text Color”, use the left square to select your desired color.
      i. After choosing the desired color, click the colored bubble to save.
g. In “Highlight Condition” use the following table to create the conditions desired for highlighting.

i. Note that the “Expression” displayed will only give you what is on your “Action Items” based on the operators chosen. (ex: Column = “Process Type”; Operator = “Like”; Expression = “Proposal – New”)

<table>
<thead>
<tr>
<th>Filter Operator</th>
<th>Shows Row if...</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>=</td>
<td>The value in the column is an exact match</td>
<td>PI = Chung, Lorinda S</td>
</tr>
<tr>
<td>!=</td>
<td>The value in the column does not equal the criteria</td>
<td>Sponsor != National Institutes of Health (NIH)</td>
</tr>
<tr>
<td>Is null</td>
<td>There is no value for that column</td>
<td>Project Title Is Null</td>
</tr>
<tr>
<td>Is not null</td>
<td>There is any value for that column</td>
<td>Project Title Is not null</td>
</tr>
<tr>
<td>In</td>
<td>The value in the column is in the list of criteria</td>
<td>SPO # in 118115, 117836, 119052</td>
</tr>
<tr>
<td>like</td>
<td>The value in the column is similar. Use this for wildcard values</td>
<td>Sponsor like %Ab% (will return Abnomics, Abbvie, etc.)</td>
</tr>
<tr>
<td>Not like</td>
<td>The value in the column is NOT similar.</td>
<td>Sponsor not like %Ab% (will exclude Abnomics, Abbvie, etc.)</td>
</tr>
<tr>
<td>contains</td>
<td>The value in that column contains the word in the criteria</td>
<td>Project Title contains placebo</td>
</tr>
<tr>
<td>Does not contain</td>
<td>The value in that column does not contain the word in the criteria</td>
<td>Project Title does not contain placebo</td>
</tr>
</tbody>
</table>

h. Click “Apply”.

i. Dashboard will now be reflective of the requirements that have been chosen.

*Please note that you cannot sort by your highlighting filters; you may use the flag if you want to segregate these items.*
FORMAT: 1-2-3 SORT
Allows you to sort by several criteria.

1. From your “My Action Items” tab, click on “Actions”.
2. Select “Format”.
3. Select “Sort”.
4. Choose items from the drop down menus for each of the following: “Column”, “Direction”, and “Null Sorting”.
   (ex: “Action Items” will be grouped FIRST (Prepare PDRF, Process Award, etc.), SECONDLY by “Process Type”, THIRDLY alphabetically by “Sponsor”.
   a. Note that “Null Sorting” indicates a data point, or unknown value that does not exist within the SeRA database. In this example below, we are requiring the Dashboard to sort any transactions without a value for the “Process Type” column as last prior to sorting any Sponsors.
5. Click “Apply”.

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Last Revised: January 14, 2016
a. Dashboard will now be reflective of the requirements that have been chosen.

SAVE REPORT
Saves the customized report for future use (it will be there after logging out and back in again).

1. From your “My Action Items” tab, click on “Actions”.
2. Select “Save Report”.

![Dashboard Screenshot]

![My Action Items Table]

![Actions Menu]

![Save Report Option]
3. Name your report and enter in an optional description.
4. Click “Apply”.

5. Dashboard will now be reflective of the requirements that have been chosen.
   a. In the “Reports” drop down menu, you can view your reports by either “Default” or “Private”.

   i. Note that clicking the red “X” will remove the report settings you’ve created.
RESET
This option restores your action items to the default settings.

1. From your “My Action Items” tab, click on “Actions”.
2. Select “Reset”.
3. A new window will display confirming your selection to reset the report back to its default settings.
4. Click “Apply”.

DOWNLOAD
This feature allows you to download your Dashboard as a csv, html, xls or pdf file.

1. From your “My Action Items” tab, click on “Actions”.
2. Select “Download”.
3. Choose the format you want your report downloaded as.
   a. *Note that dependent upon your browser and how you’ve chosen to display your downloads, the file may show up on the bottom left of your screen or on the top right hand side of your options.*