

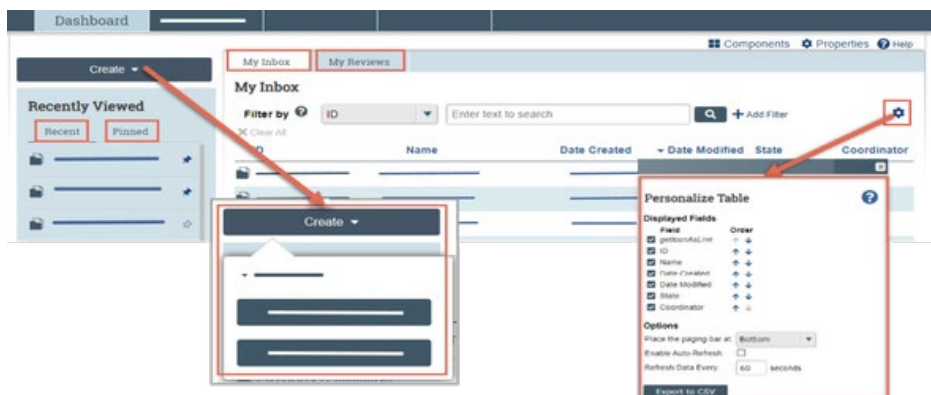
COI Discloser - Navigation and Basic Tasks

When you first log in, you will be on your Dashboard, which is the starting point for finding items and performing many basic tasks.

To find key items

From your Dashboard, you will see:

- **My Inbox:** Items that require you to take action.
- **My Reviews:** Items assigned to you to review if you are a reviewer. These are a subset of the items in My Inbox.
- **Recently Viewed:**
 - **Recent:** The last several items you viewed. Scroll through this list to find an item you worked on recently.
 - **Pinned:** You can pin the items in the Recently Viewed section for quick and easy access. This is where those pinned items are listed.
- **Personalize Table:** You can alter the tables displayed on the dashboard by using the Personalize Table gear icon.



To view history

- From the disclosure profile workspace, click the **History** tab.

The screenshot shows the 'Disclosure Profile for Jim Perry' workspace. The 'History' tab is selected, displaying a table of activities:

Activity	Author	Activity Date
Write-in Entity Managed	Administrator, System	12/16/2022 9:22 PM
Certification Review Completed	Administrator, System	12/16/2022 2:51 PM
Changes Tracked	System, User	12/16/2022 2:49 PM
Changes Tracked	System, User	12/16/2022 2:49 PM
Submit Response	System, User	12/16/2022 2:47 PM
Plan Sent to Discloser	Administrator, System	12/16/2022 1:08 PM

- The **History** tab lists the activities performed on a disclosure profile including any comments, attachments added, or disclosure profile updates.

To view training completion details

- From the disclosure profile workspace, click the **Training** tab.

The screenshot shows the 'Disclosure Profile for Jim Perry' workspace. The 'Training' tab is selected, displaying the following information:

Research training last completed: 12/16/2022
Research training expiration date: 2-4-2023

COURSES

Training Type	Course Title	Date Completed	Next Training Due Date
There are no items to display			

- The **Training** tab displays the following information:
 - Research training last completed and Research training expiration date - These dates refer to the COI specific training (as set by an institution) that a discloser must complete at required intervals. The COI solution keeps track of the expiration date and notifies the discloser when their training has expired.
 - Courses - This section lists the courses related to COI that were administered outside the COI system and taken by a discloser.

Filter and Sort Data

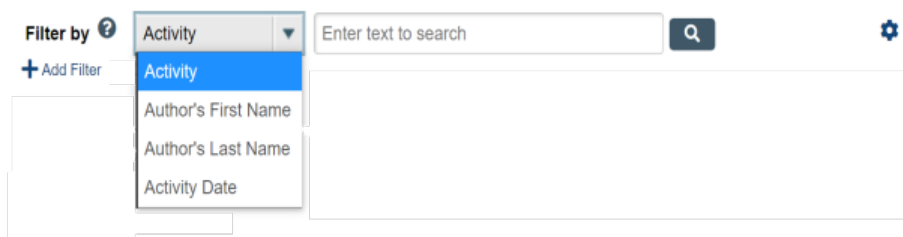
Many pages contain tables you can filter and sort to help you find the required data.

- Filtering reduces the list to only the data that meets the criteria. The advanced filter lets you combine multiple filter criteria together.
- Sorting displays the data in ascending or descending order by a particular column.

To filter data

1. Select the column to filter by from the drop-down menu. The menu lists only the columns you can filter by.

Note: To combine multiple filter criteria, such as, ID, Name, and Date Created



2. 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:
 - 71 shows all items beginning with 71
 - %71 shows all items containing 71 in any position



Tip: For examples and a list of operators you can use, click the Help icon.



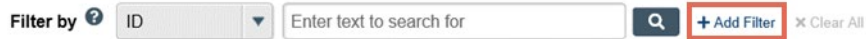
3. Click the magnifying glass icon to apply the filter.

The table shows only those rows that are an exact match.

Tip: If you do not see the expected items in the list, click **Clear All** in the Filter By area to remove the filter.

To use advanced filters

1. In the Filter by area, click **Add Filter**.



2. Enter filter criteria as explained in the filter data section.
3. To combine multiple filter criteria, click **Add Filter** once more.
4. Click the magnifying glass to apply the filter.
The table shows only those rows that match all the filter criteria.

To sort data

1. Click the column header you want to sort by.
2. Click it a second time to reverse the sort order.
The arrow indicates the column by which the data is sorted and the sort order, either ascending (up arrow) or descending (down arrow).

If the column header is not a link, you cannot sort by that column.

