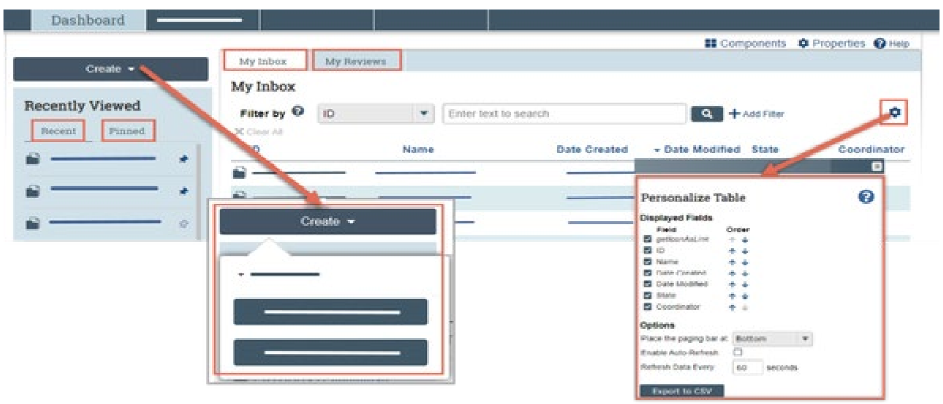
COI Reviewer - Navigation and Basic Tasks

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 identify what action is needed

- Review the state of the certification or management plan in My Inbox.
  The state gives a clue as to what to do next. For example, Committee Review means a certification is scheduled or in-review by a COI committee.

To open a certification

- From My Inbox, or from the Certifications page, click the certification name.
  The certification workspace opens.

To open a management plan

- From My Inbox, or from the Plans page (Management Plan tab), click the management plan name.
  The management plan workspace opens.

To open a retrospective review

- From My Inbox, or from the Plans page (Mitigation Plan tab), click the retrospective review name.
  The retrospective review workspace opens.

To open a triggering event

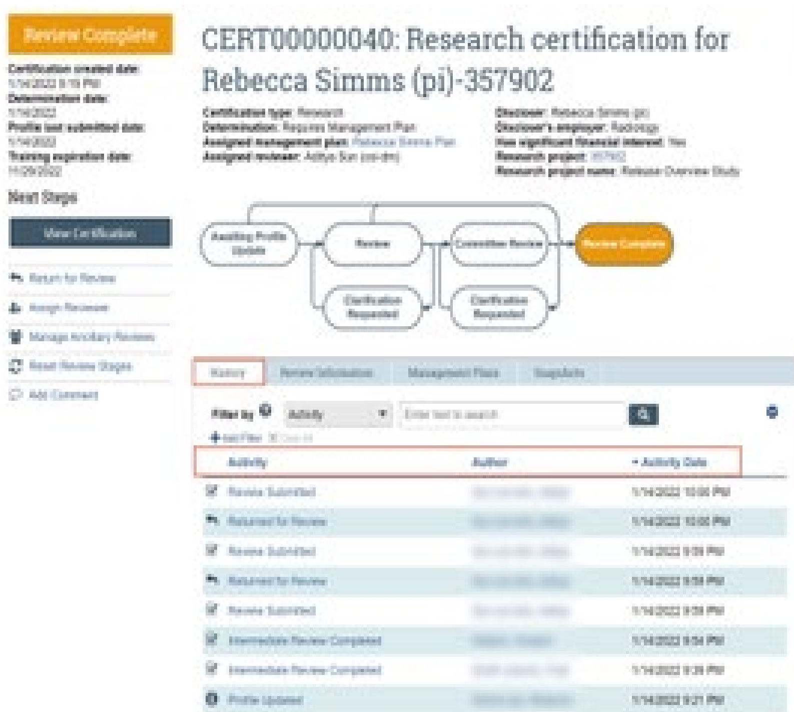
- From My Inbox, or from the Triggering Events page, click the triggering event name.
  The triggering event workspace opens.

To open a pre-approval request

- From My Inbox, or from the Requests page, click the pre-approval request name.
  The pre-approval request workspace opens.

To view history

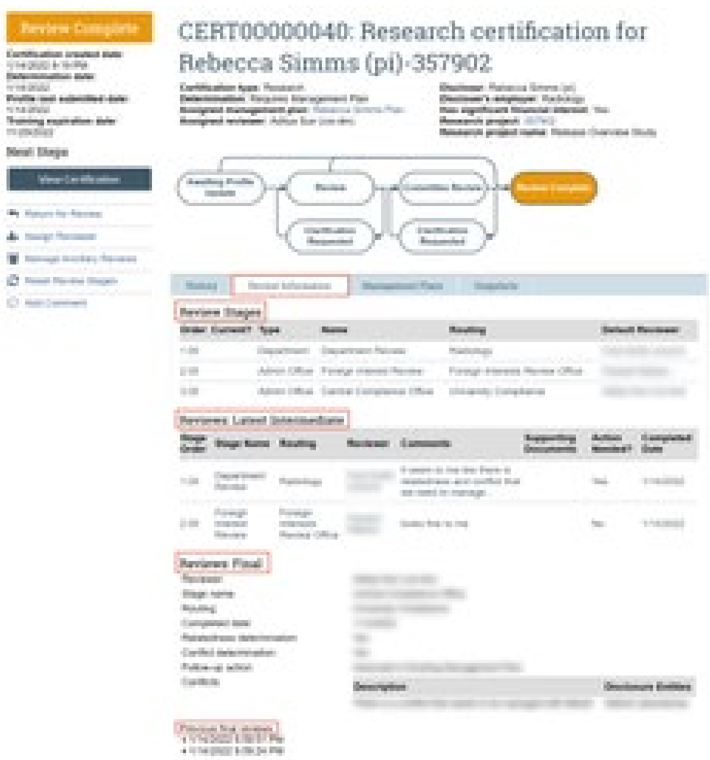
- From the certification workspace, click the **History** tab.



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

To see information about reviews

- From the project (certification or pre-approval request) workspace, click the **Review Information** tab.



The **Review Information** tab summarizes the important information you need to know about the review of this project.

- The **Review Information** tab has the following sections:
- **Review Stages** section contains information on the order of review stages and their default reviewer, as well as name and type of the review.
    - **Reviews: Latest Intermediate** section contains review information provided by the assigned reviewer in each intermediate review step. This information is provided in the Submit My Review activity.

      Note: If an intermediate review step is completed more than once, the previous review information can be accessed through the History tab.

    - **Reviews: Final** section appears after the final review is completed. It contains review determination data from the most recent final review that was performed.

- **Previous final reviews** section appears only if a final review was performed multiple times (i.e. a certification had all stages of review completed and then it was re-opened for another review).

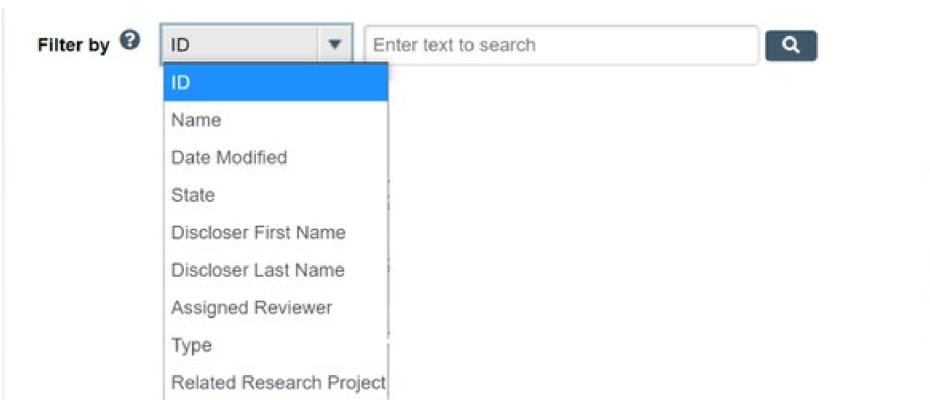
Filter and Sort Data

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.

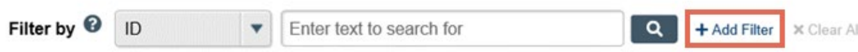
3. Click the magnifying glass icon to apply the filter.

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 previous section.
3. To add more 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).

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