

Dashboards

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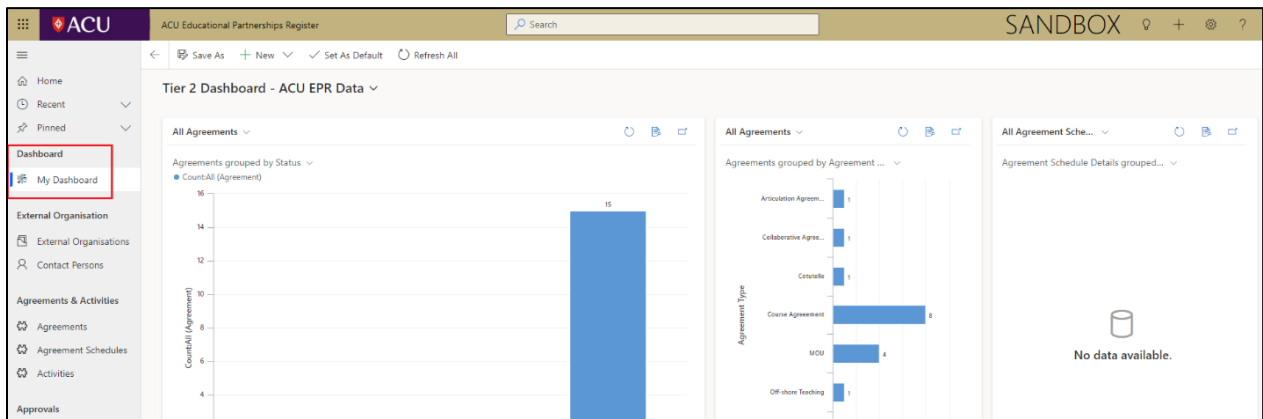
Dashboards

There are two tiers of dashboards:

- **Tier 1 Dashboard – My EPR Data** – This dashboard is the user dashboard and displays data belonging to the individual user.
- **Tier 2 Dashboard – ACU EPR Data** – This dashboard displays ACU organisation-wide data.

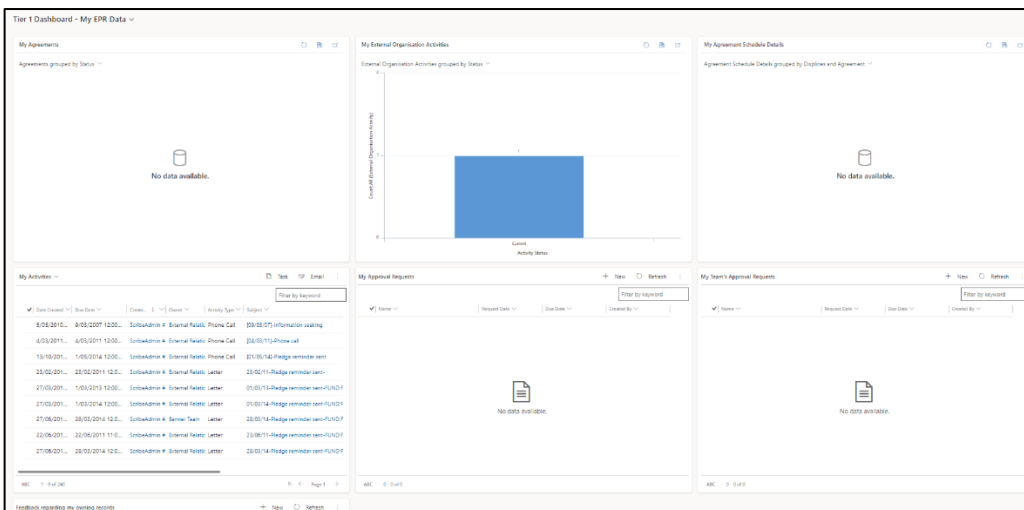
Tier 1 Dashboard – My EPR Data

1. On the left navigation bar, under **Dashboards**, select **My Dashboards**:

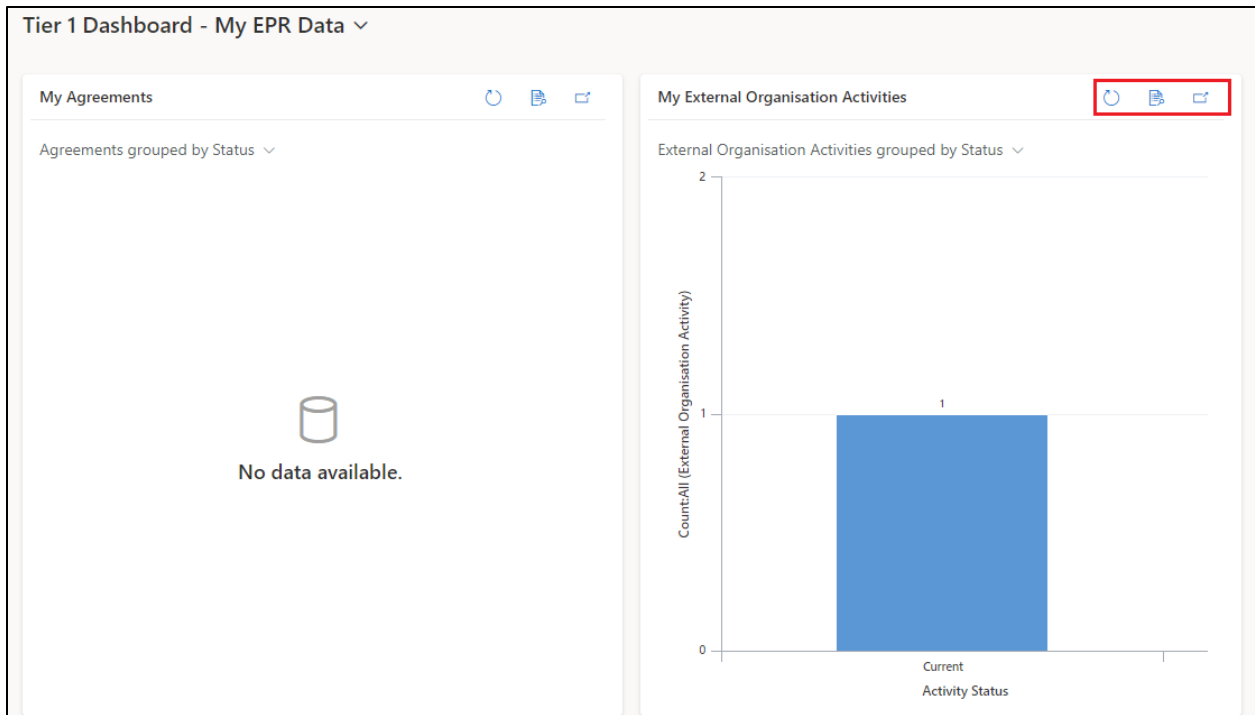


2. The **Tier 1 Dashboard – My EPR Data** shows the users individual information:

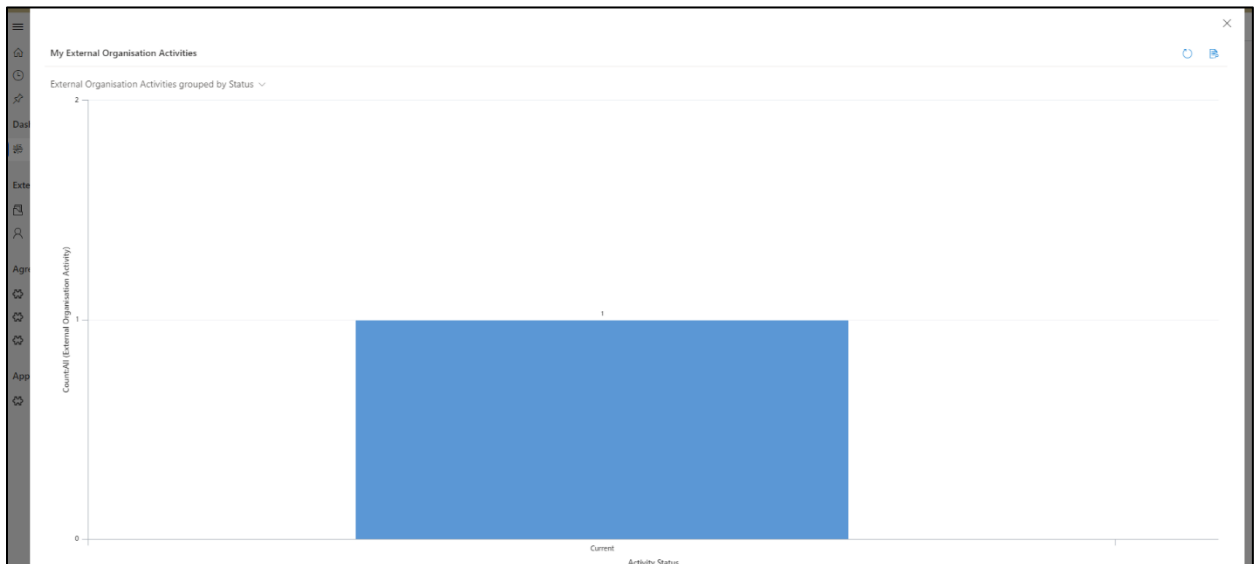
- My Agreements
- My External Organisation Activities
- My Agreement Schedule Details
- My Activities
- My Approval Requests
- My Team’s Approval Requests
- Feedback regarding my own records



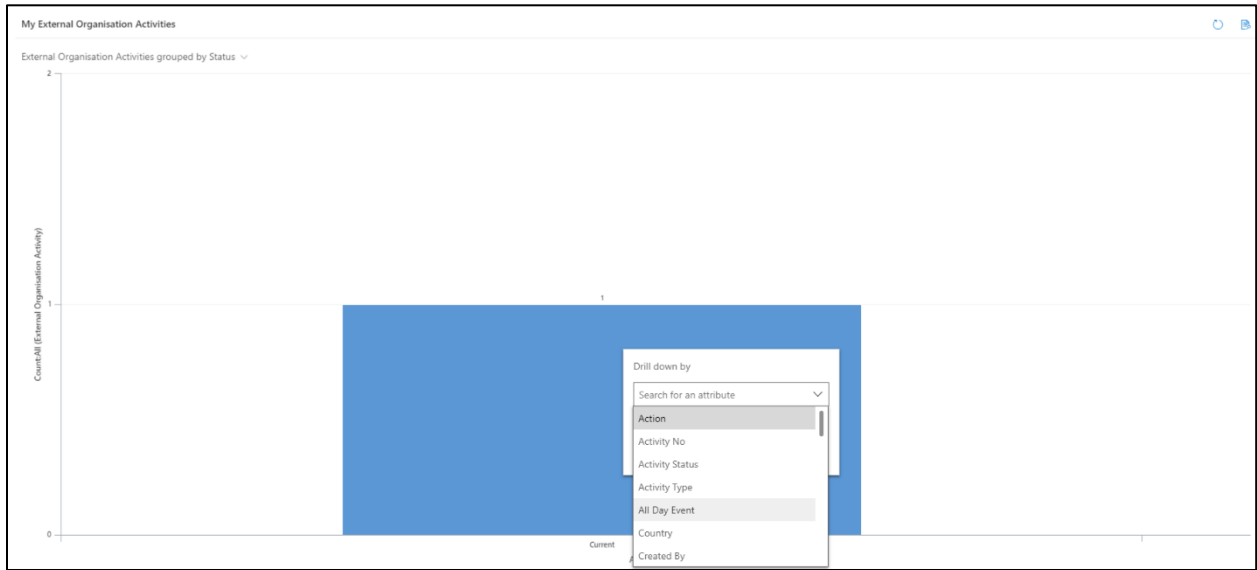
3. Use the icons at the top of the chart to **Refresh** , **View records**  and **Expand**  :



4. Click **Expand**  and the chart expands out so you can easily view it:




- Click on the chart to drill down to view other attributes:



- Where there is a list, for example, **My Activities**, click 

Tier 1 Dashboard - My EPR Data ▾


My Activities ▾ Task 

Filter by keyword

✓	Date Created ▾	Due Date ▾	Create... ▾	Owner ▾	Activ
	5/05/2010...	9/03/2007 12:00...	ScribeAdmin #	External Relatic	Pho
	4/03/2011...	4/03/2011 12:00...	ScribeAdmin #	External Relatic	Pho
	13/10/201...	1/05/2014 12:00...	ScribeAdmin #	External Relatic	Pho

5. Select **See all records**:

Tier 1 Dashboard - My EPR Data ▾

My Activities ▾ Task  My Approval Requests

Filter by keyword

✓	Date Created ▾	Due Date ▾	Create... ▾	Owner ▾	Activ
	5/05/2010...	9/03/2007 12:00...	ScribeAdmin #	External Relatic	Pho
	4/03/2011...	4/03/2011 12:00...	ScribeAdmin #	External Relatic	Pho
	13/10/201...	1/05/2014 12:00...	ScribeAdmin #	External Relatic	Pho
	23/02/201...	23/02/2011 12:00...	ScribeAdmin #	External Relatic	Pho
	27/03/201...	1/03/2013 12:00...	ScribeAdmin #	External Relatic	Pho
	27/03/201...	1/03/2014 12:00...	ScribeAdmin #	External Relatic	Pho
	27/06/201...	28/03/2014 12:00...	ScribeAdmin #	Banner Team	Pho
	22/06/201...	22/06/2011 11:00...	ScribeAdmin #	External Relatic	Pho
	27/06/201...	28/03/2014 12:00...	ScribeAdmin #	External Relatic	Pho

- Email
- Appointment
- Phone Call
- Letter
- Attendee Invite
- Campaign Response
- Other Activities >
- Refresh
- See all records**
- Email a Link | >
- Flow >
- Run Report >
- Excel Templates >
- Import from Excel | >

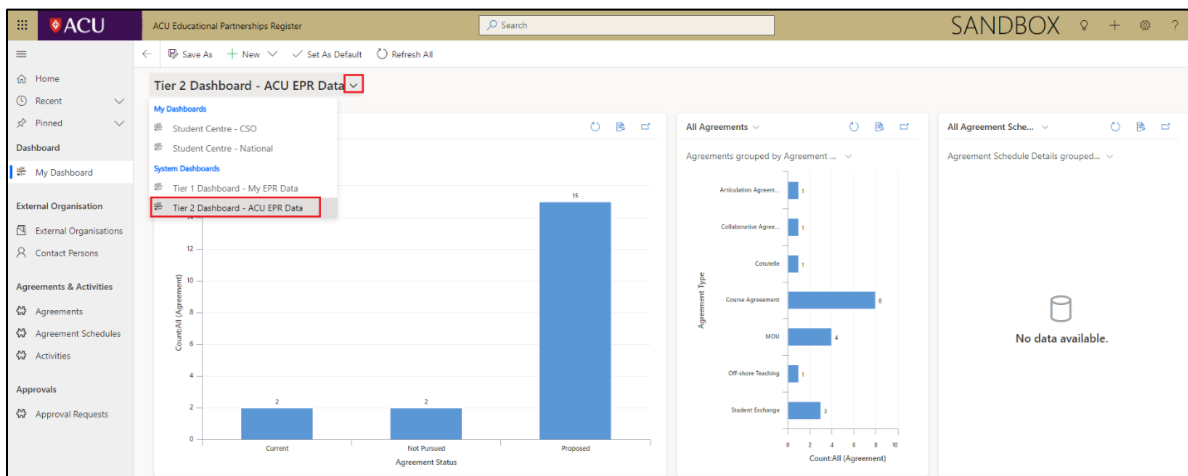
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- The **My Activities** window opens to view the full list:

Date Created	Due Date	Created By	Owner	Activity Type	Subject	Regarding	Activity Status	Priority	Start Date
5/05/2010 3:...	9/03/2007 12:00 AM	ScribeAdmin ...	External Relat...	Phone Call	[09/03/07]-Information seeking	Malcolm E. Reid	Open	Normal	9/03/2007 12:00 AM
4/03/2011 10...	4/03/2011 12:00 AM	ScribeAdmin ...	External Relat...	Phone Call	[04/03/11]-Phone call	Australian Co...	Open	Normal	4/03/2011 12:00 AM
13/10/2010 1...	1/05/2014 12:00 AM	ScribeAdmin ...	External Relat...	Phone Call	[01/05/14]-Pledge reminder sent	Catholic Educ...	Open	Normal	1/05/2014 12:00 AM
23/02/2011 1...	23/02/2011 12:00 AM	ScribeAdmin ...	External Relat...	Letter	23/02/11-Pledge reminder sent-	Judy Gould	Open	Normal	23/02/2011 12:00 AM
27/03/2012 1...	1/03/2013 12:00 AM	ScribeAdmin ...	External Relat...	Letter	01/03/13-Pledge reminder sent-FUNDF8079	John Gleeson	Open	Normal	1/03/2013 12:00 AM
27/03/2012 1...	1/03/2014 12:00 AM	ScribeAdmin ...	External Relat...	Letter	01/03/14-Pledge reminder sent-FUNDF8079	John Gleeson	Open	Normal	1/03/2014 12:00 AM
27/06/2011 1...	28/03/2014 12:00 AM	ScribeAdmin ...	Banner Team	Letter	28/03/14-Pledge reminder sent-FUNDF8082	Philip Mahony	Open	Normal	28/03/2014 12:00 AM

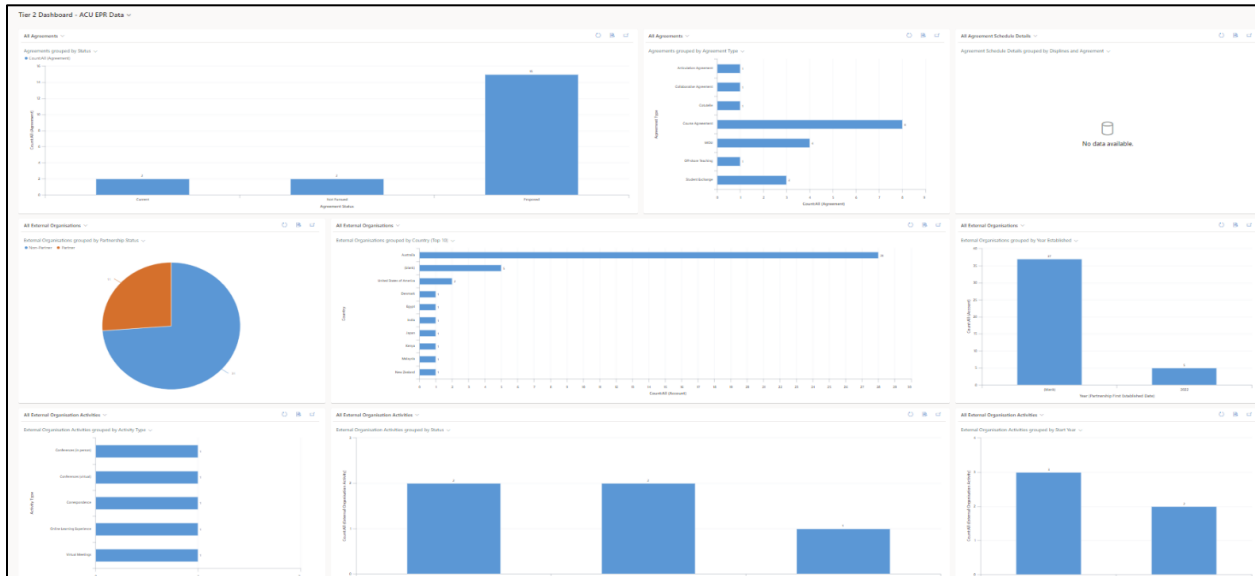
Tier 2 Dashboard – ACU EPR Data

To view the **Tier 2 Dashboard**, click the drop-down arrow , select **Tier 2 Dashboard – ACU EPR Data**:

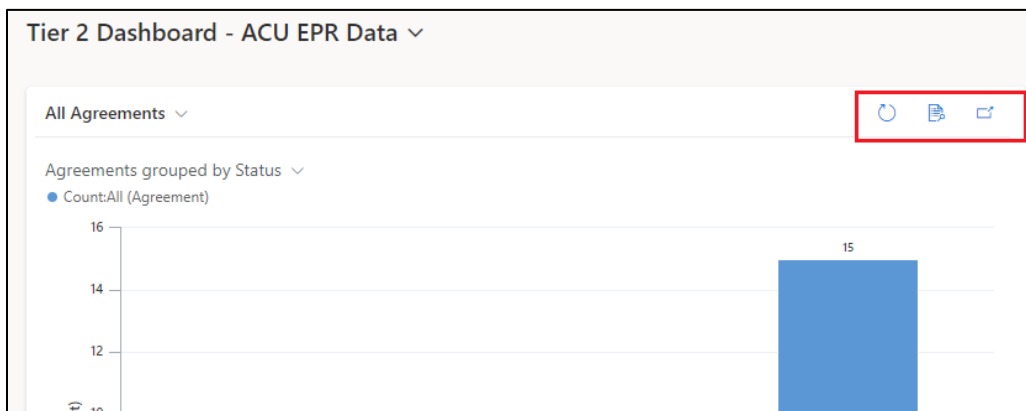


The **Tier 2 Dashboard – ACU EPR Data** shows the following, ACU organisation wide data:

- All Agreements – grouped by status
- All Agreements – grouped by agreement
- All Agreement Schedule Details – grouped by disciplines and agreement
- All External Organisations – grouped by partnership status
- All External Organisations – grouped by country (top 10)
- All External Organisations – grouped by year established
- All External Organisations – grouped by activity type
- All External Organisations – grouped by status
- All External Organisations – grouped by start year



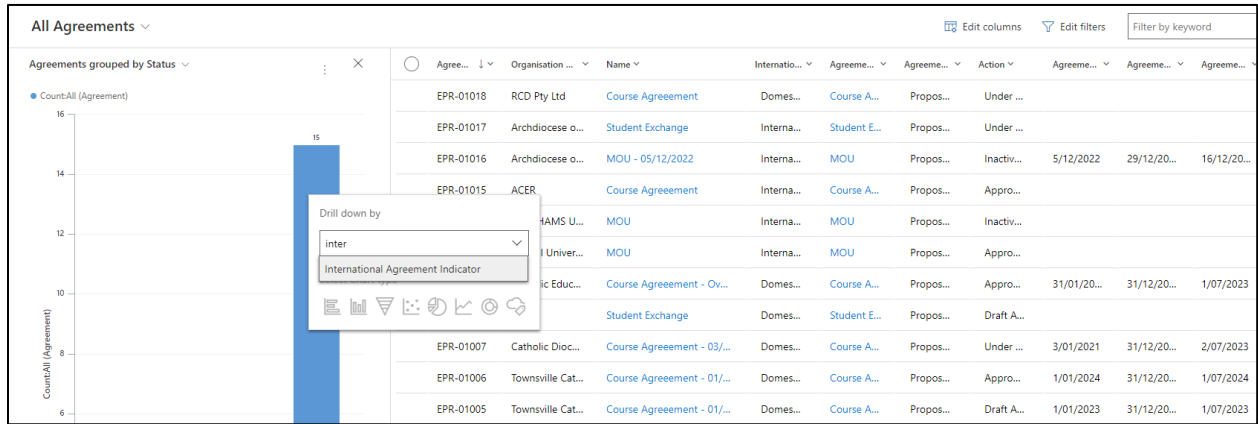
1. Use the icons at the top of the chart to **Refresh** , **View records**  and **Expand**  :



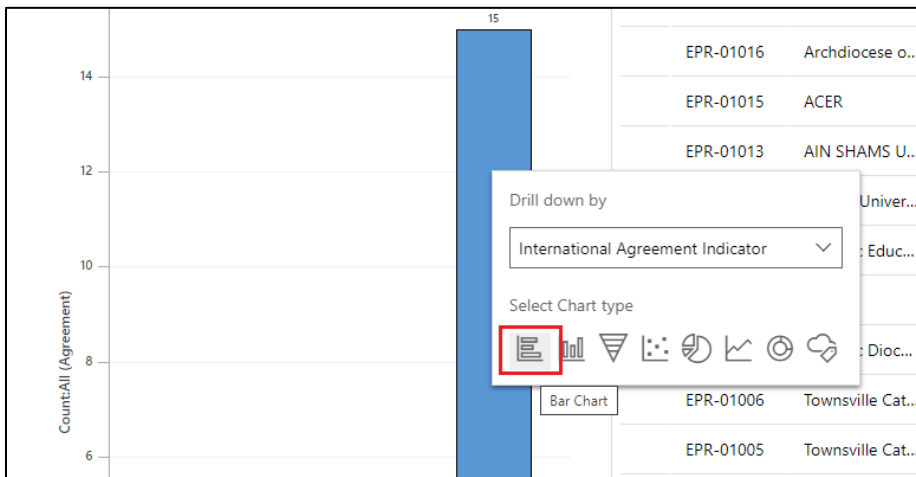
2. Click **View records**  and the records for the chart open:

All Agreements										
Edit columns Edit filters Filter by keyword										
Agree...	Organisation ...	Name	Internatio...	Agreeme...	Agreeme...	Action	Agreeme...	Agreeme...	Agreeme...	Agreeme...
EPR-01018	RCD Pty Ltd	Course Agreement	Domes...	Course A...	Propos...	Under ...				
EPR-01017	Archdiocese o...	Student Exchange	Interna...	Student E...	Propos...	Under ...				
EPR-01016	Archdiocese o...	MOU - 05/12/2022	Interna...	MOU	Propos...	Inactiv...	5/12/2022	29/12/20...	16/12/20...	
EPR-01015	ACER	Course Agreement	Interna...	Course A...	Propos...	Appro...				
EPR-01014	ALPHAX COLL...	Course Agreement	Interna...	Course A...	Not Pu...	Inactiv...				
EPR-01013	AIN SHAMS U...	MOU	Interna...	MOU	Propos...	Inactiv...				
EPR-01012	AIM BUSINES...	Collaborative Agreement	Interna...	Collabora...	Not Pu...	Inactiv...				
EPR-01011	AQUINAS CO...	Cotutelle - 08/12/2022	Interna...	Cotutelle	Current	Active	8/12/2022	28/02/20...	29/12/20...	
EPR-01010	DePaul Univer...	MOU	Interna...	MOU	Propos...	Appro...				
EPR-01009	Catholic Educ...	Course Agreement - Ov...	Domes...	Course A...	Propos...	Appro...	31/01/20...	31/12/20...	1/07/2023	
EPR-01008	ACER	Student Exchange	Domes...	Student E...	Propos...	Draft A...				
EPR-01007	Catholic Dioc...	Course Agreement - 03/...	Domes...	Course A...	Propos...	Under ...	3/01/2021	31/12/20...	2/07/2023	
EPR-01006	Townsville Cat...	Course Agreement - 01/...	Domes...	Course A...	Propos...	Appro...	1/01/2024	31/12/20...	1/07/2024	

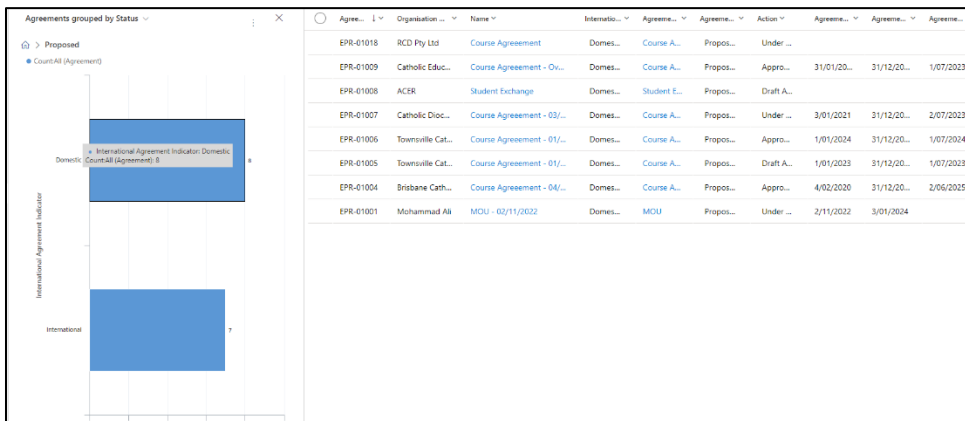
- Drill into the table to view certain information, for example, clicking on a column in the table will show the records for that column OR you can search on what you want to view, for example, **International Agreement Indicator**:




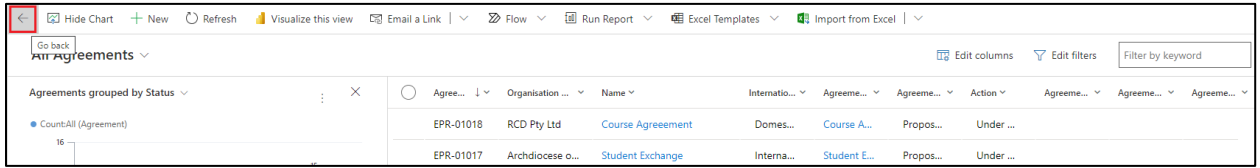
- Select which chart you want to view the data in:



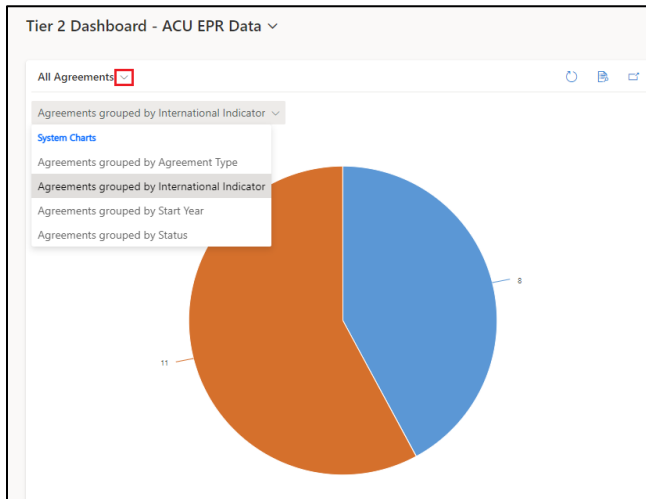
- Click on a bar to show that data:



- Click the back arrow  to return to the dashboard:




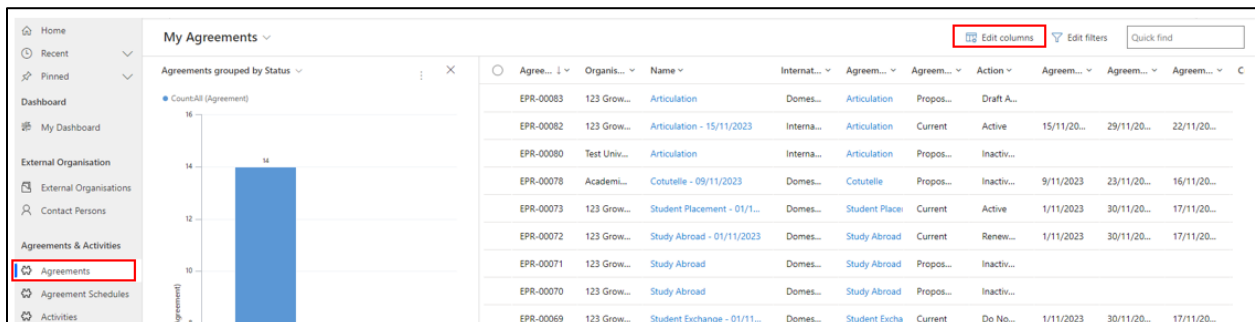
4. The dashboard offers you the option to visualize the charts in other ways, click the drop-down arrow beside the name of a chart to view other data:



Editing data view

When viewing data, you can use **Edit Columns** or **Edit Filters** to display data relevant to your business processes.

1. To edit columns to include a column that displays the creator of an agreement, in the **Agreements** window, click  **Edit columns**



2. To add a column, in **Edit columns: Agreements** panel, click **+ Add columns**

The screenshot shows the ACU Educational Partnerships Register interface. The main panel displays a table titled "All Agreements" with columns for Agreement No, Organisation Name (Primary External Organisation), Name, International Agreement Indicator, Agreement Type, Agreement Status, Action, and Agreement Start Date. The "+ Add columns" button is highlighted with a red box.

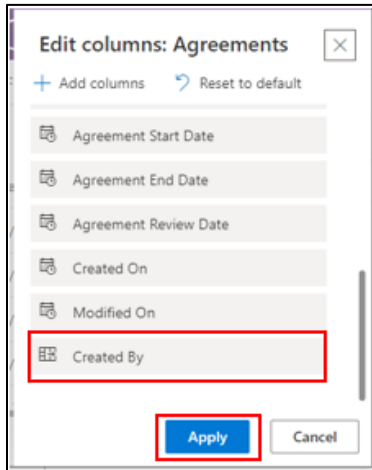
Agreement No	Organisation Name (Primary External Organisation)	Name	International Agreement Indicator	Agreement Type	Agreement Status	Action	Agreement Start Date
EPR-00083	123 Grow Chil...	Articulation					
EPR-00082	123 Grow Chil...	Articulation - 15/11/20...					
EPR-00080	Test University	Articulation					
EPR-00079	ABC University	Student Exchange - 20...					
EPR-00078	Academia Inte...	Cotutelle - 09/11/2023					
EPR-00077	123 Grow Chil...	Course Agreement - 0...					

3. Search for the relevant column from the list displayed, in this instance select **Created By**, click **Close**.

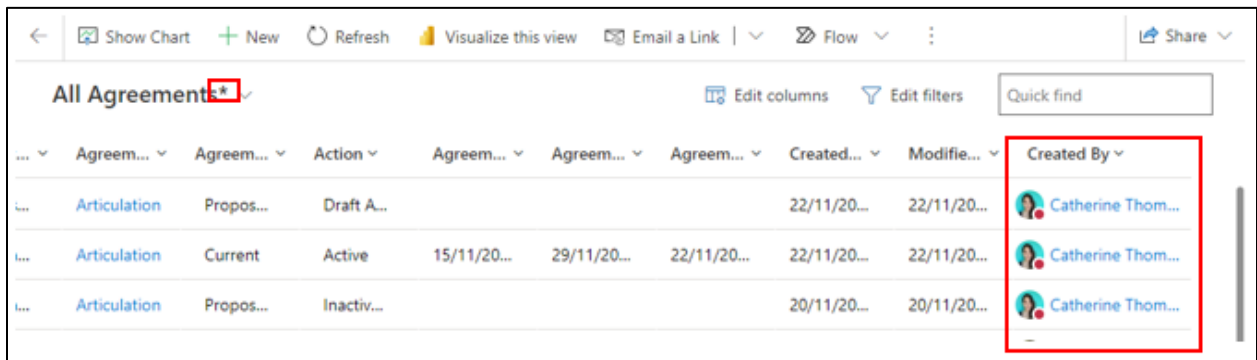
The screenshot shows the "Add columns" dialog box. The dialog has a search bar and a list of column options. The "Created By" option is selected and highlighted with a red box. The "Close" button is also highlighted with a red box.

- After selecting the appropriate column option, it will be removed from the available options in the displayed list.

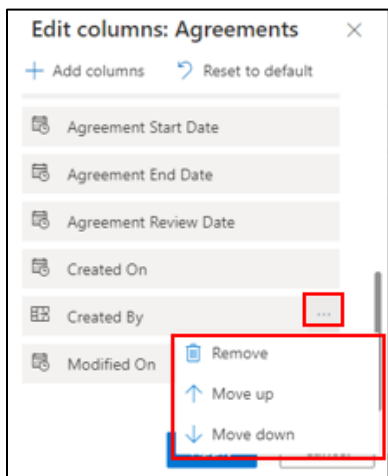
- In this example the **Created By** column now appears on the **Edit columns: Agreements** panel, click **Apply**.



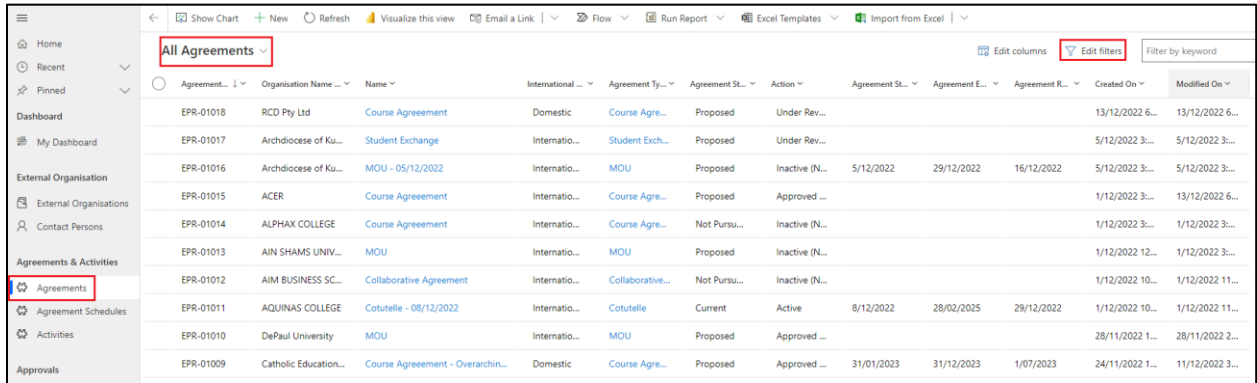
- The data now displays the **Created By** column. The * beside the **All Agreements** dropdown indicates that the view has been modified:



- To remove or change the positioning of a column, click **Edit columns**, on **Edit columns: Agreements** panel, hover over relevant column until 3 dots appear **...**, click on **...** to remove the column or move it up or down.

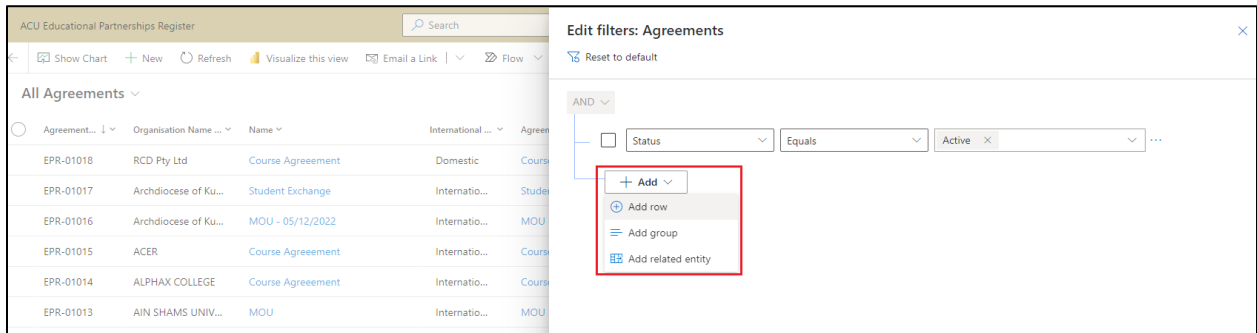


6. In the **Agreements** window the default view is **All Agreements**. If you want to view **International Agreements** only, click  **Edit filters** :



Agreement...	Organisation Name ...	Name	International ...	Agreement Ty...	Agreement St...	Action	Agreement SL...	Agreement E...	Agreement R...	Created On	Modified On
EPR-01018	RCD Pty Ltd	Course Agreement	Domestic	Course Agre...	Proposed	Under Rev...				13/12/2022 6...	13/12/2022 6...
EPR-01017	Archdiocese of Ku...	Student Exchange	Internatio...	Student Exch...	Proposed	Under Rev...				5/12/2022 3...	5/12/2022 3...
EPR-01016	Archdiocese of Ku...	MOU - 05/12/2022	Internatio...	MOU	Proposed	Inactive (N...	5/12/2022	29/12/2022	16/12/2022	5/12/2022 3...	5/12/2022 3...
EPR-01015	ACER	Course Agreement	Internatio...	Course Agre...	Proposed	Approved ...				1/12/2022 3...	13/12/2022 6...
EPR-01014	ALPHAX COLLEGE	Course Agreement	Internatio...	Course Agre...	Not Pursu...	Inactive (N...				1/12/2022 3...	1/12/2022 3...
EPR-01013	AIN SHAMS UNIV...	MOU	Internatio...	MOU	Proposed	Inactive (N...				1/12/2022 12...	1/12/2022 3...
EPR-01012	AIM BUSINESS SC...	Collaborative Agreement	Internatio...	Collaborative...	Not Pursu...	Inactive (N...				1/12/2022 10...	1/12/2022 11...
EPR-01011	AQUINAS COLLEGE	Cotutelle - 05/12/2022	Internatio...	Cotutelle	Current	Active	8/12/2022	28/02/2025	29/12/2022	1/12/2022 10...	1/12/2022 11...
EPR-01010	DePaul University	MOU	Internatio...	MOU	Proposed	Approved ...				28/11/2022 1...	28/11/2022 2...
EPR-01009	Catholic Education...	Course Agreement - Overarchin...	Domestic	Course Agre...	Proposed	Approved ...	31/01/2023	31/12/2023	1/07/2023	24/11/2022 1...	11/12/2022 3...

7. The **Edit filters: Agreements** panel opens, **Status = Active** is always prepopulated, click **Add**, select **Add Row**:



ACU Educational Partnerships Register

Search

All Agreements

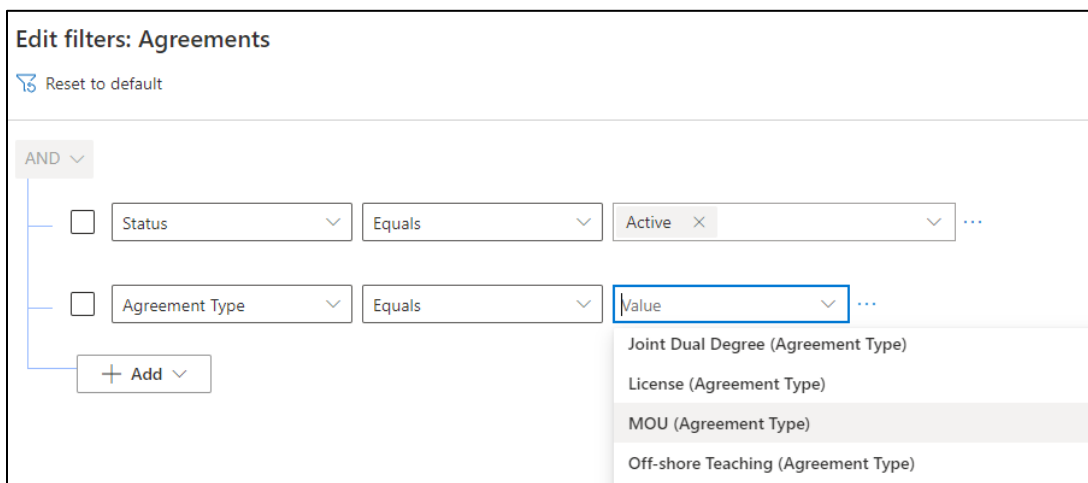
AND

Status equals Active

+ Add

- Add row
- Add group
- Add related entity

8. Select the appropriate field, in this instance select **Agreement Type** in the **Value**, search for **MOU (Agreement Type)**:



ACU Educational Partnerships Register

Search

All Agreements

AND

Status equals Active

Agreement Type equals Value

+ Add

- Joint Dual Degree (Agreement Type)
- License (Agreement Type)
- MOU (Agreement Type)**
- Off-shore Teaching (Agreement Type)

9. Add a new row, select **International Agreement Indicator = International**. Click **Apply**

- The filtered data shows all **International Agreements** where **Agreement Type** is MOU. The * beside the **All Agreements** drop-down indicates that there is a filter associated to this view:

Agreement ID	Organisation Name	Name	International	Agreement Type	Agreement Status	Action	Agreement Start	Agreement End	Agreement Review	Created On	Modified On
EPR-01016	Archdiocese of Kua...	MOU - 05/12/2022	Internation...	MOU	Proposed	Inactive (N...	5/12/2022	29/12/2022	16/12/2022	5/12/2022 3:...	5/12/2022 3:...
EPR-01013	AIN SHAMS UNIVE...	MOU	Internation...	MOU	Proposed	Inactive (N...				1/12/2022 12...	1/12/2022 3:...
EPR-01010	DePaul University	MOU	Internation...	MOU	Proposed	Approved ...				28/11/2022 1...	28/11/2022 2...

10. To remove the filter, click **Agreements** in the navigation pane, the **All Agreements** view will no longer have the * and applied filter:

Agreement ID	Organisation Name	Name	International	Agreement Type	Agreement Status	Action	Agreement Start	Agreement End	Agreement Review	Created On	Modified On
EPR-01018	RCD Pty Ltd	Course Agreement	Domestic	Course Agree...	Proposed	Under Rev...				13/12/2022 6...	13/12/2022 6...
EPR-01017	Archdiocese of Ku...	Student Exchange	Internatio...	Student Exch...	Proposed	Under Rev...				5/12/2022 3:...	5/12/2022 3:...
EPR-01016	Archdiocese of Ku...	MOU - 05/12/2022	Internatio...	MOU	Proposed	Inactive (N...	5/12/2022	29/12/2022	16/12/2022	5/12/2022 3:...	5/12/2022 3:...
EPR-01015	ACER	Course Agreement	Internatio...	Course Agree...	Proposed	Approved ...				1/12/2022 3:...	13/12/2022 6...
EPR-01014	ALPHAX COLLEGE	Course Agreement	Internatio...	Course Agree...	Not Pursu...	Inactive (N...				1/12/2022 3:...	1/12/2022 3:...
EPR-01013	AIN SHAMS UNIV...	MOU	Internatio...	MOU	Proposed	Inactive (N...				1/12/2022 12...	1/12/2022 3:...
EPR-01012	AIM BUSINESS SC...	Collaborative Agreement	Internatio...	Collaborative...	Not Pursu...	Inactive (N...				1/12/2022 10...	1/12/2022 11...
EPR-01011	AQUINAS COLLEGE	Cotulle - 08/12/2022	Internatio...	Cotulle	Current	Active	8/12/2022	28/02/2025	29/12/2022	1/12/2022 10...	1/12/2022 11...
EPR-01010	DePaul University	MOU	Internatio...	MOU	Proposed	Approved ...				28/11/2022 1...	28/11/2022 2...