

In this document, we will take a look at the parts of the Organisations screen and what they do.

It will only take a look at the elements that appear when navigating to activities using the sidebar menu.

Show Chart

Focused view

Refresh

Collaborate

Visualize this view

Email a Link

Run Report

Excel Templates

My Active Organisations

Edit columns


Edit filters

Filter by keyword

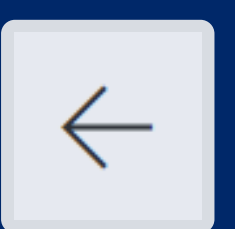
	Organisation Name	Owner Team	LO Type (Operations)	DofE Region/Country
	Bright Horizon Academy	Simon Prince	DLC	Training
	Bright Horizon Academy Centre	Simon Prince	Centre	Training

1 - 2 of 2

Page 1



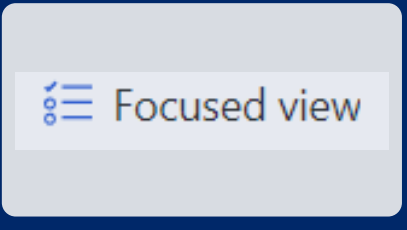
The Top Menu

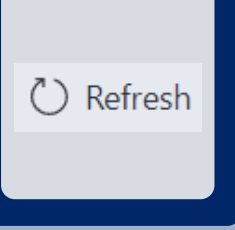
**Back Button**

Returns you to the previous screen or record.

Focused View

Clicking on this allows you to quickly switch between your Organisations and see all of the details on the screen at the same time.



**Refresh**

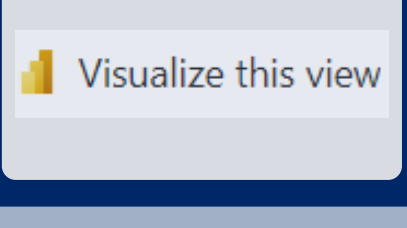
Updates the list of activities on the screen.

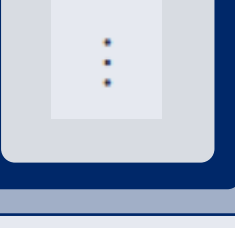
This is useful if someone assigns you an activity; this will refresh the list to show it.

Visualize this view


Allows you to turn the current view into a PowerBI dashboard.

This is only for expert users who know what they are doing with PowerBI.




**The Three Dots**

This is where hidden menu items go. When working on smaller screens, some options will hide under this menu option.

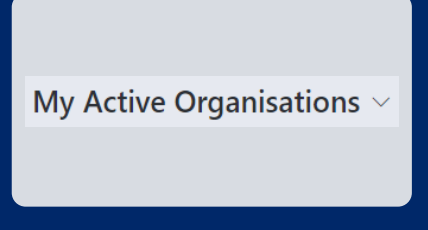


All other options on the top menu should not be used without further training, which will not be provided in this document.



My Active Organisations

This screen will show all organisations that are linked to you. It has nothing to do with which Organisations are licenced.

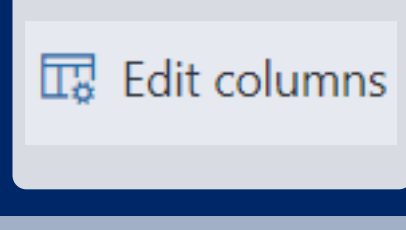
**My Active Organisations**

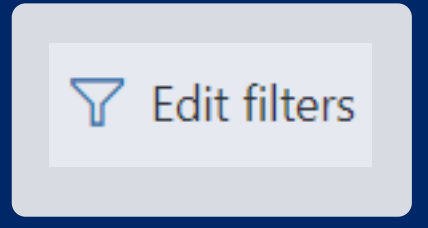
This is the view selector. This will allow you to switch between different sets of data.

Edit Columns

This option allows us to add more columns to the data we see.

This is primarily used for creating custom views.



**Edit Filters**

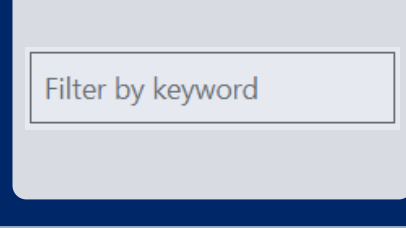
This option allows us to change the filters for the current view.

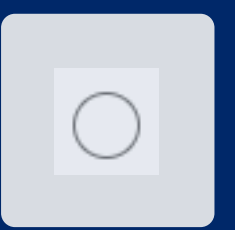
This is primarily used for creating custom views.

Filter Bar

This option allows us to search the data in the current view.

It will not search for data that is not shown in the current view.



**Select**

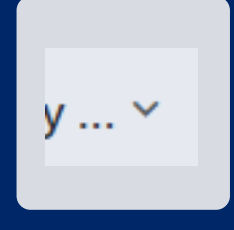
When you hover over each activity on the screen you will see this option. It allows you to select the activity.

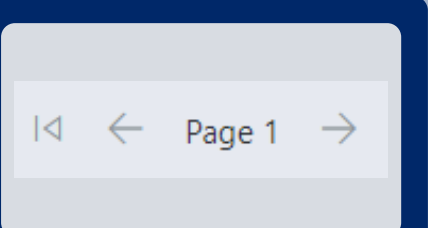
The top circle allows you to select all activities on the page.

Column Filter

The down arrow next to each column heading allows you to, when clicked, sort and filter by each column.


This will be used when creating custom views.



**Page Navigation**

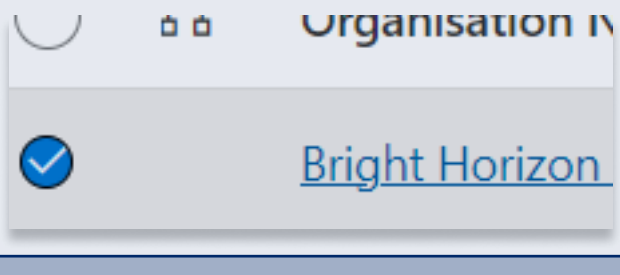
When you have more than 50 entries on a page, the data will start to go across the pages.


Use the arrows to move between pages.



Top Menu on Select

When you select an organisation, using the circles on the left-hand side, the top menu changes to give us more options. This section will explore the different options you can use.



**Edit**

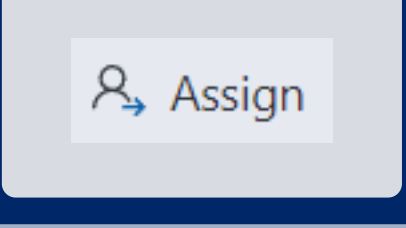
This allows you to open and edit the organisation details.

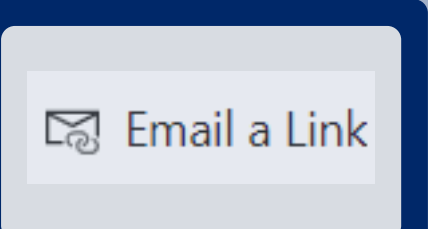
You can also go into edit mode by double clicking any blank space on the row.

Assign

This allows us to transfer an organisation to another user.


This should be used when you transfer part, or all, of your portfolio to someone else.




**Email a Link**

This is useful for sharing activities with other users, without giving up ownership.

Can be useful for getting input from someone else.




All other options on the top menu should not be used.



Task: Play

Take some time to press all the above options to become familiar with the system.

As long as you are in the testing site (Orange banner at the top) you cannot break anything.



For further Dynamics guides, make sure to check out the Digital Systems page on the hub.

This page can also be used to access an array of other learning material.

For further help, reach out to systemstraining@dofe.org