



QUICK REFERENCE GUIDE

FOR RESEARCH OFFICES

Setting up a Home Page

Introduction

This document should be used in conjunction with the REGIS User Manual document 'Homepage Tiles'.

The first time you log into REGIS, your home page will be blank. Setting up your home page will significantly help you manage your tasks and workflows in REGIS.

What information is needed?

You should have the following information ready to get started in REGIS: your username, password and a list of tasks you would like to see on the home page.

Home page/dashboard tiles

There are 8 tile options and each tile can be created any number of times with the title and filters changed each time to represent the action of the tile.

Add dashboard tile		
Found 8 dashboard tiles		
☐ Dashboard	Activity	
☐ Dashboard	Application	
☐ Dashboard	Decision	
☐ Dashboard	Document	
☐ Dashboard	Forms	
☐ Dashboard	Milestone	
☐ Dashboard	Review	
☐ Dashboard	Task	

How many?

Depending on the type and resolution of your screen, you can fit 8-10 visible tiles (2 rows of 4 or 5 tiles). You can add additional tiles, but they are only visible by scrolling down.

Note: If you select a width or height greater than 1 x 1, this will take up more space on your screen.

Create a home page tile

Step 1



Click the 'Edit' icon at the bottom left of the screen.

Click '+Add' and a black panel will appear on the right side of the screen.



Step 2

Select the type of tile you wish to create on your homepage by clicking on the check box next to your chosen option and then clicking the apply tick at the bottom of the panel.

A tile will now appear on your home page.

Step 4

Hovering your mouse over the top righthand corner of the tile you want to edit, or filter will make the below icons appear.

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Selecting the 'Edit' icon will make the

'Edit dashboard tile' panel will appear.

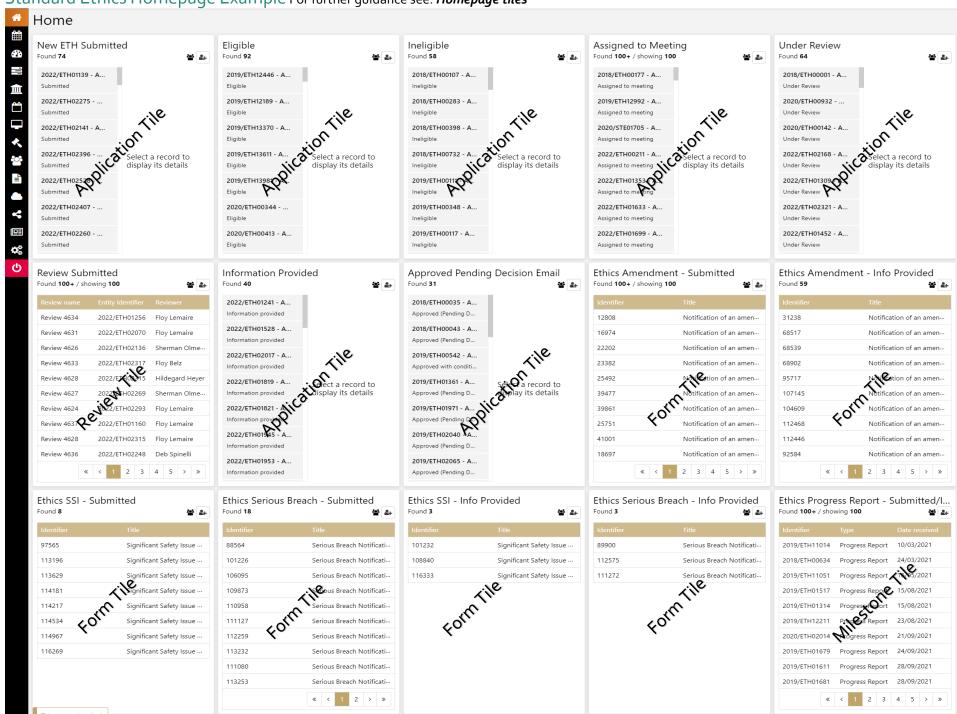
Tip: If you cannot see the edit and delete icons, click the 'Edit' icon on the bottom left corner of the screen.

Edit dashboard tile	
Title	Application
Display	Table •
Width *	1 *
Height *	1 v
Portfolio	Please select
Program	Please select *
Round	Please select *
Submission type	Please select ▼
Submitted only	No v
Status	Please select
With tags	Please select *
Without tags	Please select *
Classification	Please select *
Decision status	Please select *
Sort order	Ascending
Sort by	Date modified v
Unassigned only	Please select ▼
	★ Close ✓ Apply

For further guidance on home page tiles see: Homepage Tiles



Standard Ethics Homepage Example For further guidance see: Homepage tiles



Standard Governance Homepage Example For further guidance see: Homepage tiles

