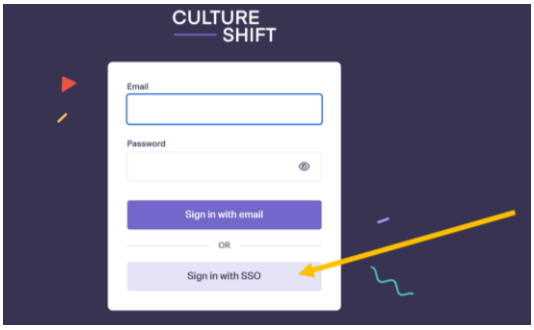
Report + Support (R+S) Dashboard Guide for individual staff users

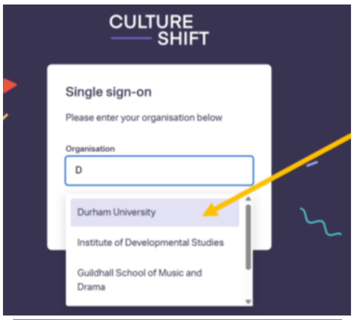
Part 1: Logging in using Single Sign-On (SSO)

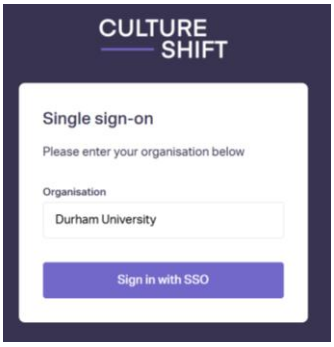
1.1. Go to the **R+S Dashboard** site: https://dashboard.reportandsupport.co.uk/.

1.2. Select the '**Sign in with SSO**' option.



1.3. Under '**Organisation**', select **Durham University** from the dropdown list.

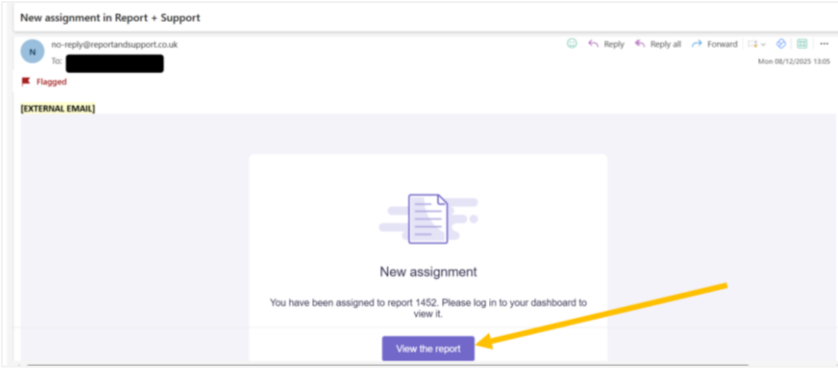




1.4. Click '**Sign in with SSO**'. If you have already logged onto a Durham University application, you will no longer be asked to re-enter your CIS credentials. Otherwise, log in with your usual CIS credentials (Durham University username and password) when prompted.

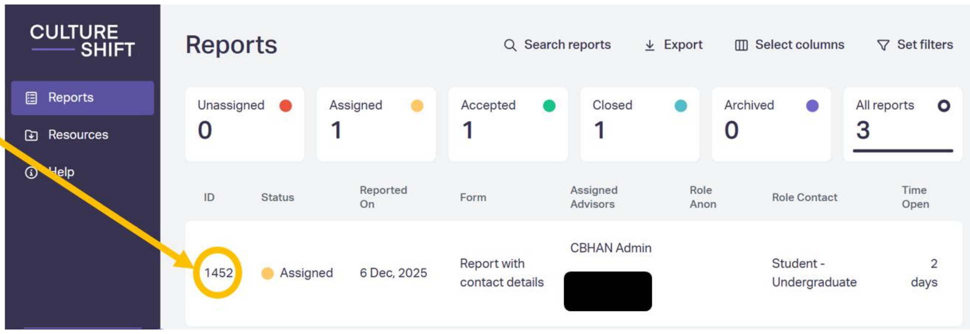
Part 2: Accessing the report details (when a report is assigned to you) and accepting the report

2.1. You will receive a system-generated email notification that a report has been assigned to you, indicating the report number. Click '**View the report**'.

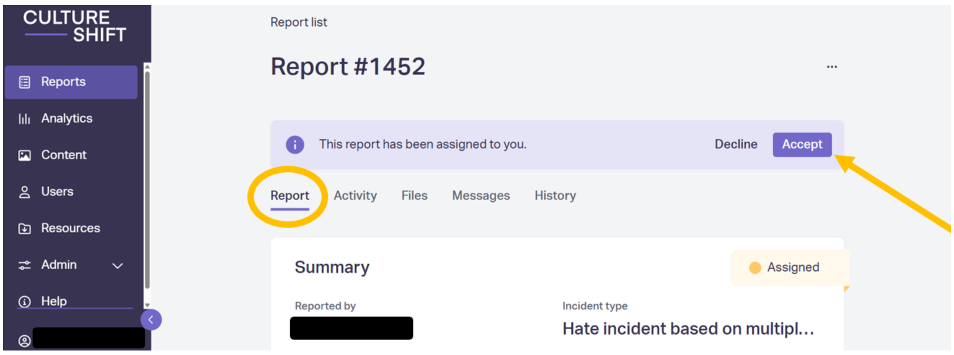


2.2. Log into the R+S Dashboard (using the steps outlined in Part 1 of this guide).

2.3. The **Dashboard** will appear where you will see the report/s assigned to you. Click the relevant **report number** to access the full report.



2.4. The summary and the full details of the report will be accessible through the **'Report'** tab. To accept an assigned report, click the **'Accept'** button at the upper right-hand side.



Each report will have these tabs: Activity, Files and History (NB. The Messages tab is currently inactive).

Activity Tab

This is where you can add updates and notes and track the progress of a report. Any notes you add, as well as records of any external activity (such as a phone call or meeting), are displayed in chronological order. This gives everyone a complete, up-to-date picture of everything that has happened. If needed, you can also redact notes from here by clicking the three-dot menu.

Files Tab

This is where you can upload and manage all documents related to the report.

History Tab

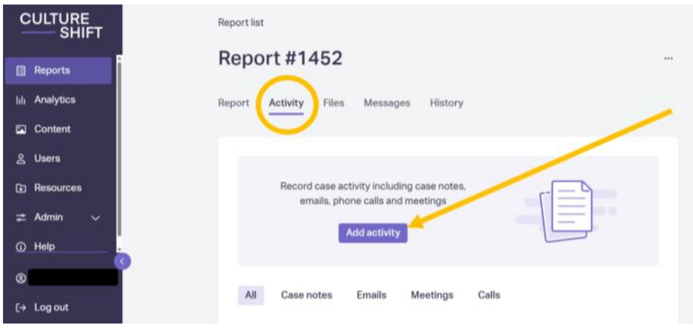
Think of this as the report's official activity/audit log. It gives you a complete picture of all status changes, file uploads, assignments, and system updates related to the report. It's the ultimate source of truth for the report's journey through the system.

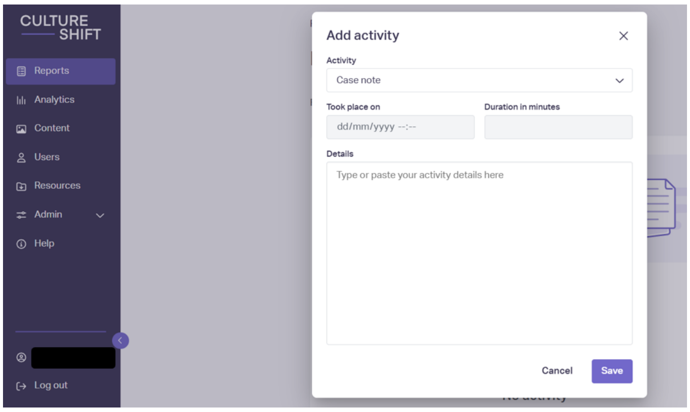
Part 3: Updating a report

3.1. Login to the R+S Dashboard (https://dashboard.reportandsupport.co.uk/).

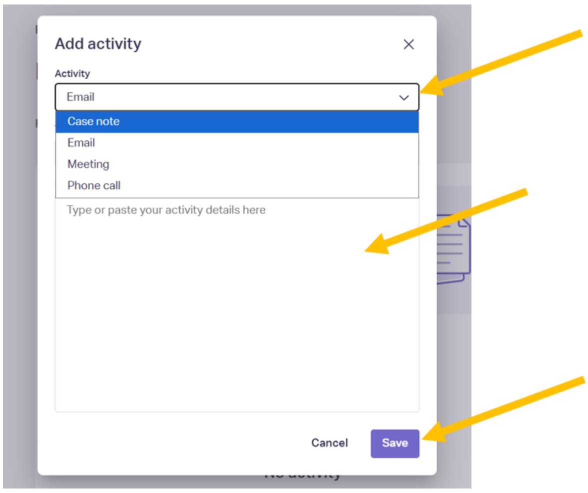
3.2. Click the relevant report number to access the full report.

3.3. Go to the **'Activity'** tab. Click **'Add Activity'**. The pop-up box for adding an activity will then appear.

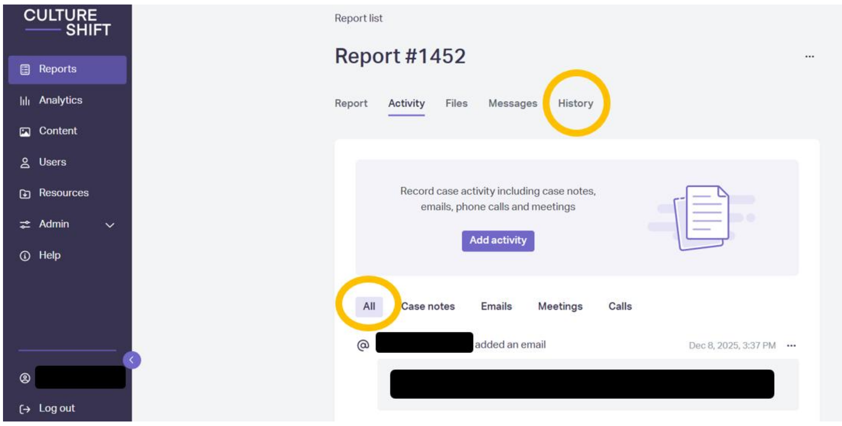




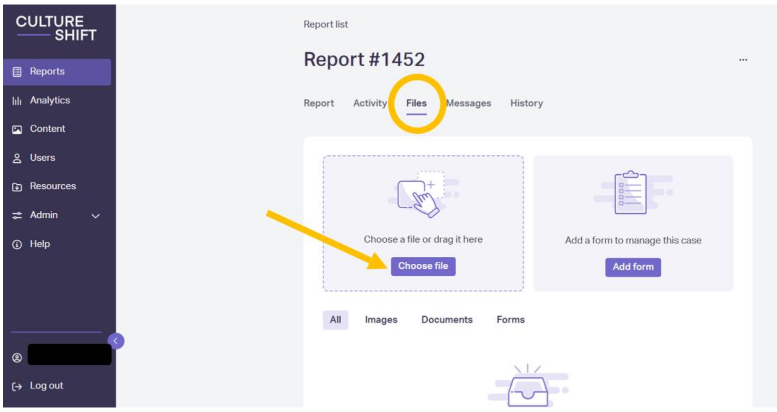
3.4. From the ‘Activity’ drop-down menu, select the type of activity you wish to add. Type the details of your activity or update in the ‘Details’ free text box. Then click **‘Save’**,

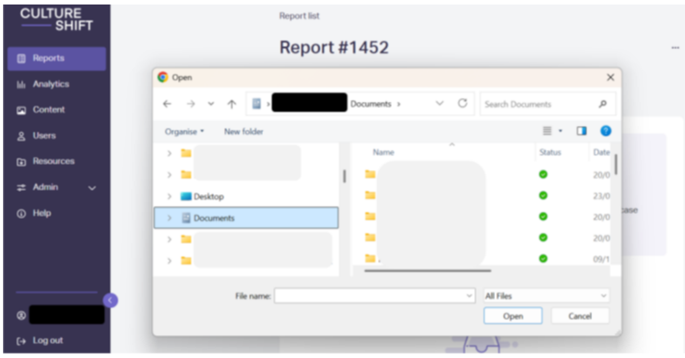


Your update will then appear in the activity trail, which can be accessed by clicking **‘All’** or by going to the **‘History’** tab. Please ensure that any updates (e.g. actions done and communications sent out) in relation to a particular report are logged onto the system.



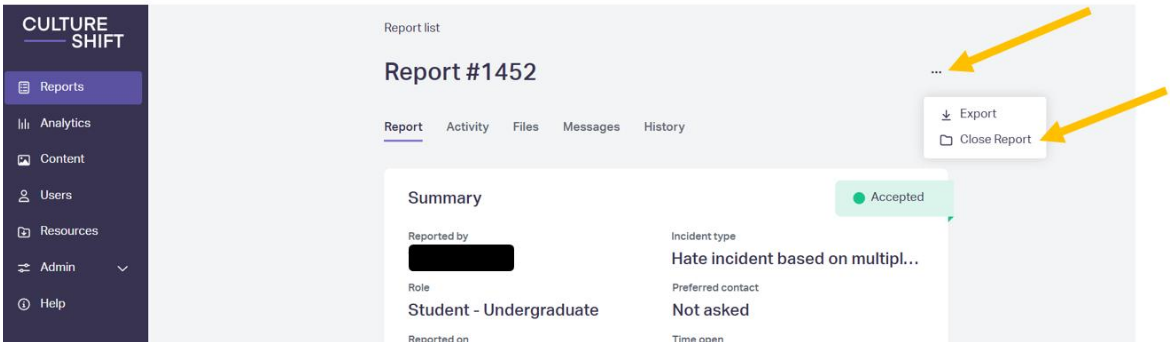
3.5. If you wish to upload a file, go to the **'Files'** page. You can add files by dragging a file into the upload box or by clicking the **'Choose file'** option. If you click **'Choose file'**, a dialogue box will appear - select the file that you are uploading. Once uploaded, you can click on any file to download it.



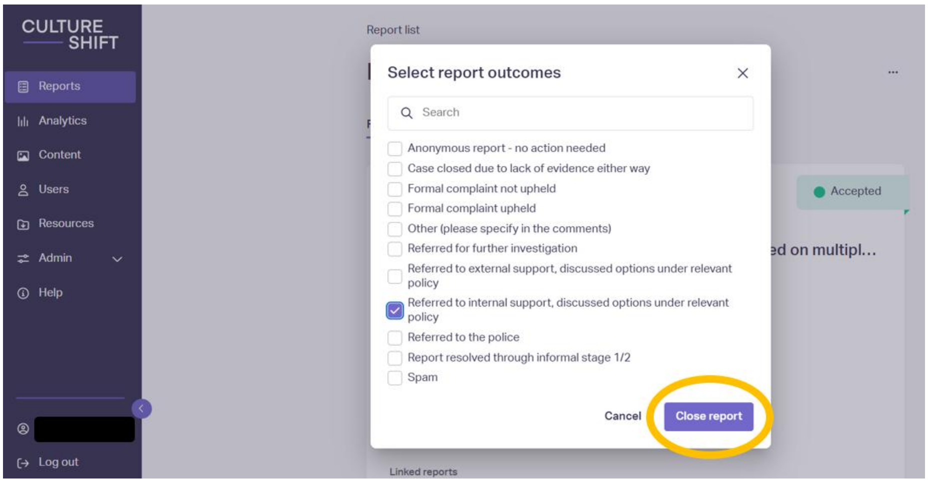


Part 4: Closing a report

4.1. Click the three dots (…) at the upper right-hand side of the page. Click **'Close Report'** from the small pop-up box.



4.2. The **report outcomes** pop-up box will then appear. Select and tick the relevant outcome/s from the options. Then click **'Close Report'** at the bottom.



Other queries regarding the Dashboard?

For further assistance, please contact edi.team@durham.ac.uk.