ERA 2.0

Removing Returned TRs from Dashboard

An **Approving Official** can remove a Transfer Request (TR) or multiple TRs via bulk action from Dashboard view. This only applies to TRs in **Returned** status. The Remove From Dashboard action *should be taken only if no further actions are likely to take place on the form(s)*. However, removed TRs in Returned status can be restored back to Dashboard(s).

Only an Approving Official can remove/restore TRs from/to the Dashboard. Transferring Officials cannot perform these actions; however, they will receive a notification if an Approving Official removes or restores a TR that has been assigned to them.

This job aid covers the following in ERA 2.0:

- Removing an individual TR from the Dashboard

- Removing multiple TRs via bulk action from the Dashboard

- Finding or restoring TRs previously removed from the Dashboard

**Removing an individual TR from the Dashboard**

1. Go to the Transfer Request section of the Dashboard.
2. Proceed to *My Tasks* to remove TRs assigned to you **OR** proceed to *My Team's Tasks* to remove TRs assigned to anyone on your Team.
3. Locate the desired TR in Returned status and select the vertical ellipsis to the right of it.
4. Select "Remove From Dashboard" from the pop-up list of available actions.
5. A pop-up message then appears to confirm that the TR will be removed if you proceed. This removes the TR from all Dashboards across your Team, as applicable.
6. To proceed with removing the TR, select "Confirm."
7. A notification will confirm that the TR has been removed from view via the Dashboard.

The image above shows the vertical ellipsis and "Remove From Dashboard" from steps 3 and 4.

Removing Multiple TRs via Bulk Action from the Dashboard

1. Go to the Transfer Request section of the Dashboard.
2. Proceed to *My Tasks* to remove TRs assigned to you **OR** proceed to *My Team's Tasks* to remove TRs assigned to anyone on your Team.
3. Select the checkboxes for TRs in Returned status to be removed from the Dashboard.
4. Then go to the *Select Bulk Action* menu toward the top right of the Dashboard.
5. Select the "Remove From Dashboard" option from the pop-up list of available actions.
6. A pop-up message then appears to confirm that the TRs will be removed if you proceed. This removes the TRs from all Dashboards across your Team, as applicable.
7. To proceed with removing the checkmarked TRs, select "Confirm."
8. A background task to complete this action begins. You may track via *Task Progress*: ▤
9. The task will complete and a notification will confirm that the TRs have been removed from view via the Dashboard.
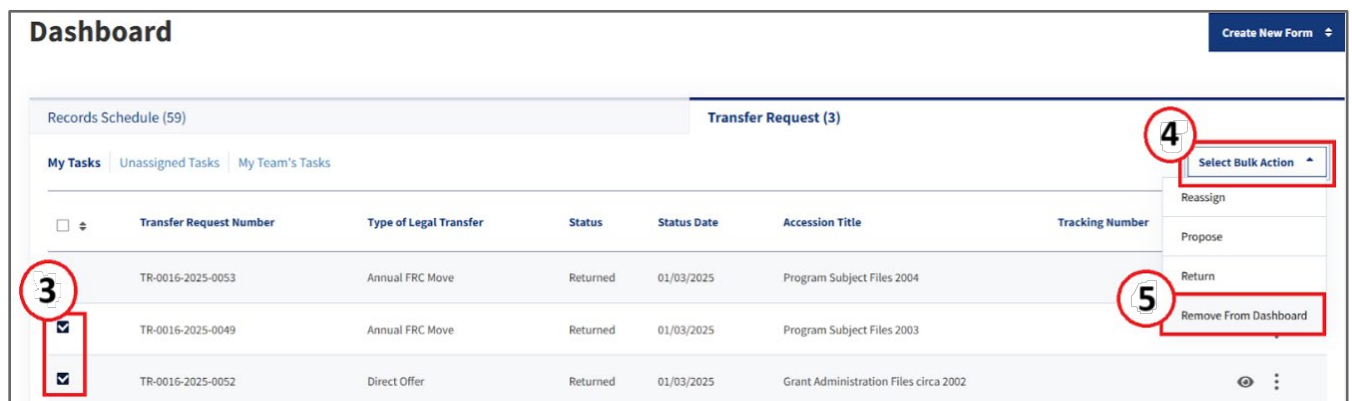
The image above shows steps 3, 4, and 5 of the process to remove multiple TRs via bulk action.

Finding or Restoring TRs Previously Removed from the Dashboard

You can **find** removed TRs through keyword search or advanced search. You can **restore** these individual TRs to Dashboard view from search results. *(Reminder: TRs in Returned status only.)*

1. Search for the previously removed TR via keyword search or advanced search.
2. Select the vertical ellipsis to the right of the returned TR from the search results.
3. Select the "Restore to Dashboard" option from the pop-up list of available actions.
4. Select "Confirm" on the pop-up message that appears.
5. Once completed, a notification will confirm that the TR was restored to Dashboard(s).

The image below shows the Restore to Dashboard option for a TR that had been previously removed.