Reading the Overview

The scoreboard: one row per tribe with its health, latest visit score, overdue work and document state, and the filters that narrow it to the tribes you look after.

The **Overview** is the first page in Compliance and the one to open on a Monday. It answers one question: which tribes need attention this week.

The six counts across the top

Card	What it counts
Visits due this month	Visits scheduled between the first and last day of this month that are not finished.
Overdue	Checks whose due date has passed and which nobody has submitted.
Awaiting review	Submissions sitting with you, plus documents waiting to be approved.
Open actions	Corrective actions and information requests not yet verified, with the overdue count underneath.
Documents expiring	Current documents expiring within 30 days, with expired ones underneath.
Documents missing	Required document types with nothing current lodged against them.

The health column

Every tribe gets one of three states, worked out from the row itself. It is deliberately blunt, so a long list can be scanned rather than read.

State	What causes it
Needs attention	Anything overdue or expired, or the last visit failed.
Work pending	Open actions, documents expiring or missing, or a submission waiting on review.
On track	None of the above.

> **A FAILED VISIT OUTRANKS A GOOD SCORE**
> A tribe that scored 92 per cent but failed a critical item still reads Needs attention. The percentage is an average; a critical item is a standard that was not met.

Narrowing the list

- **My tribes** shows only the tribes you are the business advisor for. This is the switch most advisors leave on.
- **Business advisor** shows one colleague's tribes. It lists only people who advise at least one tribe, not every team member. If your organisation has renamed this role, Tribe Settings will use your own word for it while the Compliance screens still say Business advisor.

- **Health** filters to Needs attention, Work pending or On track.

> **AN EMPTY ADVISOR LIST MEANS NOBODY IS ASSIGNED**
> The advisor filter reads from the operations advisor set on each tribe. If it says no data is available, no tribe has one yet — set it on the tribe, under Tribe Settings, and the filter and the Overview column fill in.

The columns

Column	What it shows
Latest visit	The score from the most recent completed visit, and when it was submitted. Click through to the report.
Next visit	The next scheduled visit date. Click through to open it.
Overdue	Checks past their due date at this tribe.
Actions	Open actions, with the overdue count beside it.
Documents	Missing, expired and expiring counts, or All current when there is nothing to chase.
Business advisor	Who looks after the tribe.

Clicking a tribe name opens its profile, which is the page to have in front of you before a renewal or a difficult conversation.