Reporting Module

Agenda

Introduction to Reporting module

Capabilities of Reporting module

Demonstration of Reporting module

Introduction

Reporting Module Functions and Permissions

- View report of studies in the system and filter on title, start/end date, keywords, type, funding source, recruitment status.
- View counts of primary principal investigators, principal investigators, and associate principal investigators.
- Download list of studies and metadata in the system.
- View report of user accounts in the system and filter on first name, last name, account status, institution, and account role.
- Download list of user accounts and the metadata in the system.

Reporting module capabilities

- View and filter on study metadata and account metadata.
- Download study metadata and account metadata.

<Reporting Module Demonstration>

View/Download reports

1. By default, the user views the studies metadata report.

2. View the accounts report by selecting the report from the drop-down menu.

3. Filter on the reports by typing in a word to search on in the search box at the top right of the table and selecting which columns to search on. On the studies metadata report, you can also search by start/end date.

4. Click to download a report as an XLS, CSV, or PDF using the links on the page.