

How to Use the Filter Function to Search for Studies

2. From the drop-down list next to Filter, select the attribute you would like to filter on.

The screenshot shows the 'Filter' dropdown menu open, with 'State' selected. The menu options are: ID, Name, Date Modified, State, PI First Name, PI Last Name, Coordinator, and Submission Type. The background table shows columns: ID, Name, Date Modified, State, PI First Name, PI Last Name, Coordinator, and Submission Type. Two rows are visible: 'STUDY00000055' (demo) and 'RNI00000029' (RNI Demo - STUDY00000050).

Note

- The column headings on the page are the attributes available in the drop down list.
- Different tabs may have different attributes available to search.

3. Add text or numbers to the Filter search field and select the “Go” button.

The screenshot shows the 'Filter' dropdown menu open, with 'State' selected. The search field contains 'pre-review' and the 'Go' button is highlighted. The background table shows columns: ID, Name, Date Modified, State, PI First Name, PI Last Name, Coordinator, and Submission Type. Two rows are visible: 'STUDY00000055' (demo) and 'RNI00000029' (RNI Demo - STUDY00000050).

Note

- The filter function performs an exact filter of the search term entered, although capitalization does not impact the filter function. For example, “Pre-Review” or “pre-review” will filter the same.
- Use the wildcard symbol: “%” if you may not know the exact filter term or to shorten the length of a filter text.

4. After the filter is applied, items that match the filter will be displayed. The number of items displayed will be indicated at the bottom left of the listing.

The screenshot shows the filtered results for 'pre-review'. The table displays 5 items. The bottom left of the listing indicates '5 items'. The bottom right shows '25 / page'.

ID	Name	Date Modified	State	PI First Name	PI Last Name	Coordinator	Submission Type
STUDY00000055	demo	11/17/2017 2:51 PM	Pre-Review	ra15	ra15		Initial Study
RNI00000027	RNI Training-STUDY00000050	11/17/2017 8:51 AM	Pre-Review	ra15	ra15		Reportable New Information
STUDY00000054	Demo Study	11/16/2017 4:44 PM	Pre-Review	ra15	ra15		Initial Study
STUDY00000039	Demonstration Project	11/14/2017 4:29 PM	Pre-Review	ra15	ra15		Initial Study
STUDY00000010	Demonstration	11/9/2017 1:32 PM	Pre-Review	ra15	ra15		Initial Study

Note

- The default view displays 25 items per page. If the filter finds more than 25 items, there will be multiple pages and you will need to navigate to the additional pages to see all results.

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5. Multiple filters can be added to refine a filter.
 - a. Select “+ Add Filter” to add more than one filter.

The screenshot shows the filter interface with the following elements:

- Buttons: In-Review, Active, Archived, New Information Reports, All Submissions
- Filter section: State (dropdown), pre-review (text input), Go button, + Add Filter (highlighted), x Clear All
- and: Submission Type (dropdown), %report (text input), x
- Table header: ID, Name, Date Modified, State, PI First Name, PI Last Name, Coordinator, Submission Type
- Table row: RNI00000027, RNI Training-STUDY00000050, 11/17/2017 8:51 AM, Pre-Review, ra15, ra15, Reportable New Information
- Footer: 1 items, page 1 of 1, 25 / page

- b. Select the “X” next to the added filter to remove the added filter.

The screenshot shows the filter interface with the following elements:

- Buttons: In-Review, Active, Archived, New Information Reports, All Submissions
- Filter section: State (dropdown), pre-review (text input), Go button, + Add Filter, x Clear All
- and: Submission Type (dropdown), %report (text input), x (highlighted)
- Table header: ID, Name, Date Modified, State, PI First Name, PI Last Name, Coordinator, Submission Type
- Table row: RNI00000027, RNI Training-STUDY00000050, 11/17/2017 8:51 AM, Pre-Review, ra15, ra15, Reportable New Information
- Footer: 1 items, page 1 of 1, 25 / page

6. Select “x Clear All” to remove all filters.

The screenshot shows the filter interface with the following elements:

- Buttons: In-Review, Active, Archived, New Information Reports, All Submissions
- Filter section: State (dropdown), %pre-review (text input), Go button, + Add Filter, x Clear All (highlighted)
- Table header: ID, Name, Date Modified, State, PI First Name, PI Last Name, Coordinator, Submission Type
- Table rows:
 - STUDY00000055, demo, 11/17/2017 2:51 PM, Pre-Review, ra15, ra15, Initial Study
 - RNI00000027, RNI Training-STUDY00000050, 11/17/2017 8:51 AM, Pre-Review, ra15, ra15, Reportable New Information
 - STUDY00000054, Demo Study, 11/16/2017 4:44 PM, Pre-Review, ra15, ra15, Initial Study
 - STUDY00000039, Demonstration Project, 11/14/2017 4:29 PM, Pre-Review, ra15, ra15, Initial Study
 - STUDY00000010, Demonstration, 11/9/2017 1:32 PM, Pre-Review, ra15, ra15, Initial Study
- Footer: 5 items, page 1 of 1, 25 / page

7. To filter by date ranges, within the filter drop down list, select a date attribute (e.g. Date Modified, Expiration Date) and:
 - a. Use the Greater Than symbol: “>” to filter for all dates **after** the date entered.

The screenshot shows the filter interface with the following elements:

- Buttons: In-Review, Active, Archived, New Information Reports, All Submissions
- Filter section: Date Modified (dropdown), >11/14/2017 (text input, highlighted), Go button, + Add Filter, x Clear All
- Table header: ID, Name, Date Modified, State, PI First Name, PI Last Name, Coordinator, Submission Type
- Table rows:
 - STUDY00000055, demo, 11/17/2017 2:51 PM, Pre-Review, ra15, ra15, Initial Study
 - STUDY00000054, Demo Study, 11/16/2017 4:44 PM, Pre-Review, ra15, ra15, Initial Study
 - STUDY00000047, November 16 Test Protocol - External Sites, 11/16/2017 8:17 AM, Pre-Submission, ra15, ra15, Initial Study
 - STUDY00000042, External IRB, 11/15/2017 8:02 AM, Pre-Submission, ra15, ra15, Initial Study
- Footer: 4 items, page 1 of 1, 25 / page

Note

- Greater Than symbol does not include the date entered. For example, in the filter above, any studies modified on 11/14/2017 would not be displayed, only **after**.

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- b. Use the Less Than symbol: "<" to filter for all dates **before** the date entered

The screenshot shows the 'Filter' section with 'Date Modified' selected. The input field contains '<11/13/2017' and the 'Go' button is highlighted. Below the filter, a table lists two studies:

ID	Name	Date Modified	State	PI First Name	PI Last Name	Coordinator	Submission Type
STUDY00000010	Demonstration	11/9/2017 1:32 PM	Pre-Review	ra15	ra15		Initial Study
STUDY00000003	KCORA-9: Test Protocol - 11/7/2017	11/7/2017 10:38 AM	Pre-Submission	ra15	ra15		Initial Study

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Note

- Less Than symbol does not include the date entered. For example, in the filter above, any studies modified on 11/13/2017 would not be displayed, only **before**..
- c. Apply two filters to filter for a date range. Use the Greater Than symbol: ">" and the Less Than symbol: "<" to filter for dates **between** the dates entered.

The screenshot shows the 'Filter' section with two filters applied: 'Date Modified' > 11/14/2017 and 'Date Modified' < 11/17/2017. The 'Go' button is highlighted. Below the filter, a table lists three studies:

ID	Name	Date Modified	State	PI First Name	PI Last Name	Coordinator	Submission Type
STUDY000000054	Demo Study	11/16/2017 4:44 PM	Pre-Review	ra15	ra15		Initial Study
STUDY000000047	November 16 Test Protocol - External Sites	11/16/2017 8:17 AM	Pre-Submission	ra15	ra15		Initial Study
STUDY000000042	External IRB	11/15/2017 8:02 AM	Pre-Submission	ra15	ra15		Initial Study

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Note

- In the filter above, any studies modified on 11/14/2017 or 11/17/2017 would not be displayed. Only studies **after** 11/14/2017 and **before** 11/17/2017 would display.
- d. Use the Equal To symbol: "=" to filter for an exact date.

The screenshot shows the 'Filter' section with 'Date Modified' selected. The input field contains '=11/16/2017' and the 'Go' button is highlighted. Below the filter, a table lists two studies:

ID	Name	Date Modified	State	PI First Name	PI Last Name	Coordinator	Submission Type
STUDY000000054	Demo Study	11/16/2017 4:44 PM	Pre-Review	ra15	ra15		Initial Study
STUDY000000047	November 16 Test Protocol - External Sites	11/16/2017 8:17 AM	Pre-Submission	ra15	ra15		Initial Study

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