Interactive Reporting - enables users to customize reports. Users can alter the layout of the report data by selecting column, applying filters, highlighting, and sorting. Reports can also be saved or downloaded as a file.

- **Search Bar** - The search bar allows for a quick search of the data, selecting the number of rows displayed, and contains the “Actions” menu.
  1. In the search field enter the specific term(s) you are looking for (ex: clinical trial)
  2. Click the magnifying glass icon to limit the text search to a specific column.
  3. Click Go
  4. Results will now be filtered to only include results that match search terms that were entered.
  5. To remove the filter, click the grey ‘X’

*Note that unselecting the checkbox will no longer sort with those columns, however clicking the ‘X’ will remove the filter completely.

- **Number of Records Displayed** - If there are a large number of records associated with the search not all will display on the page. Select the drop down arrow and select a larger value to control the number of rows displayed on the page.
**Column Header** – Click column header (i.e., Sponsor Name, PI Name, etc.), additional actions are available such as sorting, hiding the column, and creating a Control Break.

1. Click the hyperlink for any of the columns to display options
   a. Click icon to sort ascending (A-Z, 1-10)
   b. Click icon to sort descending (Z-A, 10-1)
   c. Click icon to hide the column
   d. Click icon to create a Control Break

1. Filter by specific result (ex: selecting “Abbott Vascular Devices” from the Sponsor Name column will create a filter to only show projects with “Abbott Vascular Devices” as the sponsor.)

1. To remove the filter, click the gray ‘X’
**Action Menu** - From the search bar click the drop down arrow for Actions

1. **Select Columns** – Allows user to choose which columns to display
   a. From the Actions drop down list, click Select Columns.

   b. Select columns window displays a Do Not Display column and a Display in Report column.

   c. Use the arrow options to remove/add columns to your report.
      i. These buttons control the horizontal movement from one box to the other.
d. Use the arrows to the far right to edit the order in which the columns display
   i. These buttons control the vertical movement within the display box

   *Note: top to bottom = left to right on the report*

   ![Arrows for column movement]

   - Move to top (1st column)
   - Move up one
   - Move down one
   - Move to bottom (last row)

   e. Click Apply.
   f. Search results will now be reflective of the columns that have been selected and the viewing order that was chosen.

2. **Filter** – Allows user to display search results based on specific criteria.
   a. From Actions menu, select Filter.
   b. Select Filter Type Column or Row
      i. Column filter will display the columns to filter by (PI, Sponsor, etc)
         1. Select an Operator (=, like, contains, etc.)
         2. Choose an expression (will only show what exists in the report already).
ii. **Row filter type**

1. Enter desired filter criteria.

3. **Rows Per Page** – Allows users to select how many results to display per page
   a. From Actions menu, select Rows per Page.
   b. Select number of rows to display on report.
4. **Format** – allows user to customize report format.
   a. From the Actions menu, select Format.

   ![Format Menu]

   b. 1-2-3 Sort allows you to sort by several criteria.
   i. Choose from the drop down menus for each of the following: Column, Direction, and Null Sorting.

   ![Sort Dialog]

   c. Control Break – User can create a break group on one or several columns. This pulls the columns out of the interactive report and displays them as a master record.
   i. Select the column(s) to enable the break for.

   ![Control Break Dialog]
d. Highlight - Enables you to define a filter. The rows that meet the filter criteria display as highlighted using the characteristics associated with the filter.
   i. Name your Highlight (ex: New Proposals)
   ii. In Highlight Type, select either Row or Cell
   iii. In Background Color and Text Color, use the left square to select your desired color.
   iv. In Highlight Condition select values for column, operator, and expression to set the conditions to meet for the highlighting. (Ex: Process Type = Proposal - New)
   v. Click Apply

vi. Report results will include highlighted rows of results that contain Proposal- New.
e. Chart - You can define one chart per saved report. Once defined, you can switch between the chart and report views using links below the Search bar.

5. **Save Report** – saves the customized report for future use.
   a. From the Actions menu, select Save Report
   b. Name the report and enter a description (optional).
   c. Click Apply

   ![Save Report](image)

   d. If you save customized reports, a Reports selector displays in the Search bar to the left of the Rows selector

   ![Reports Selector](image)

   e. Click the grey X to remove customized report

   ![Report Removal](image)
6. **Reset** – returns the report to the default settings removing any customizations that were made.
   a. From Actions menu, select Reset
   b. Click Apply

   ![Reset Image]

   ![Reset Image]

7. **Help** – provides additional help for interactive report features.
8. **Download** – allows user to download the search results to a file (i.e., Excel, PDF, etc)
   a. From Actions menu, select **Download**
   b. Choose the format you want to download report as