

# JDPA VoX Platform - Work Instructions

Who completes the tasks in this step?	Why do we need this feature?	What files can be referred to or who can be contacted for help?
Research Ops	Allows users to filter data for an entire study by a specific data point	Config Lead or Product Owner




## What needs to occur before this step can start

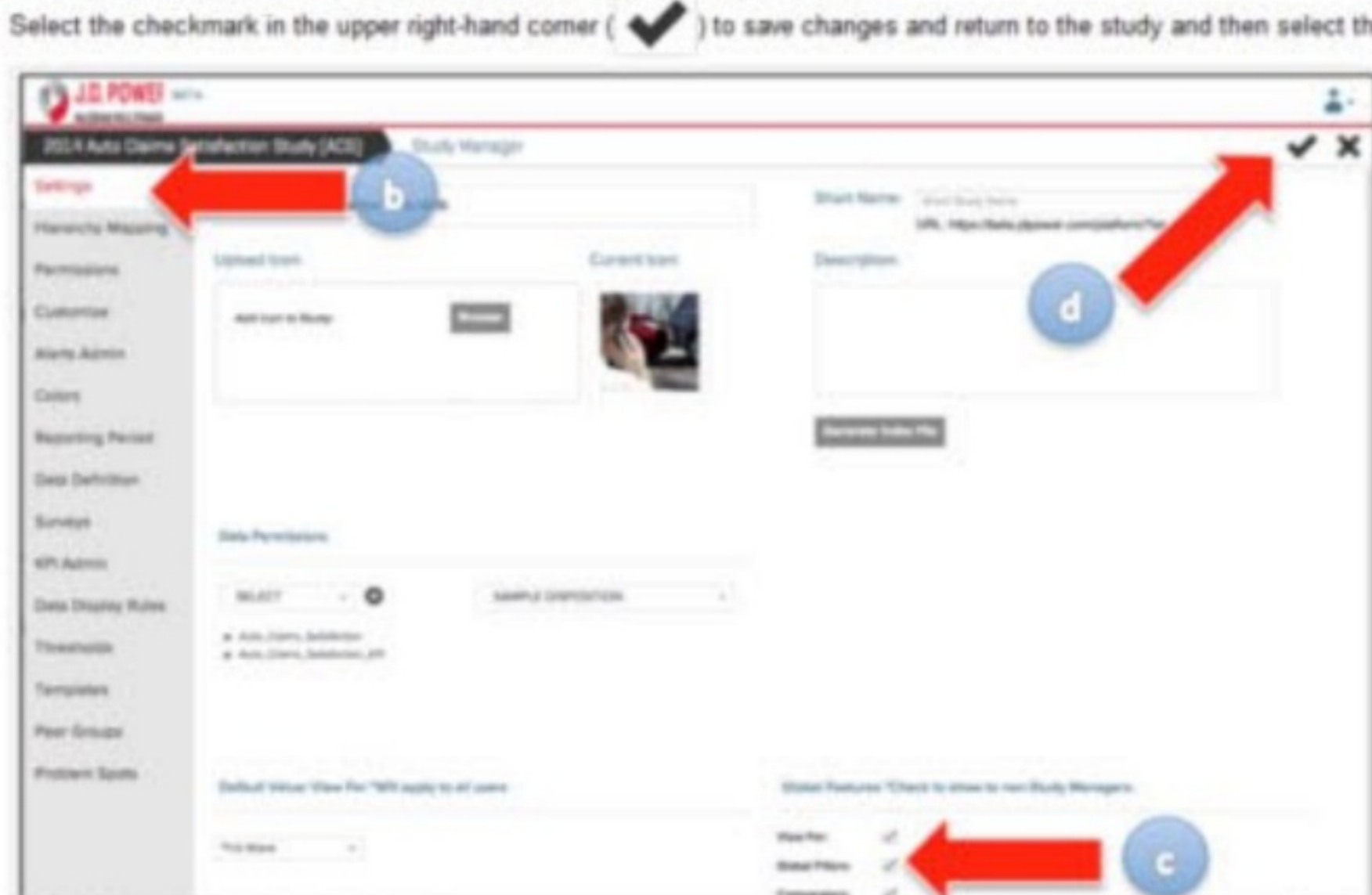
- MDM and data load complete
- Study Manager setup complete

## What happens during this step

- Create a new global filter that can be applied to a study for all users to access

## Tasks

1. Log in to the platform
2. Access the study and its dashboard
3. Enable the Global Filter feature for Non-Study Managers (Global Filter is always enabled for Study Managers)
  - a. Access the Study Manager by selecting the Pencil icon (  )
  - b. Select Settings from the menu on the left.
  - c. Select the checkbox next to "Global Filters." in the lower right of the screen.
  - d. Select the checkmark in the upper right-hand corner (  ) to save changes and return to the study and then select the "X" (  ) to exit Study Manager

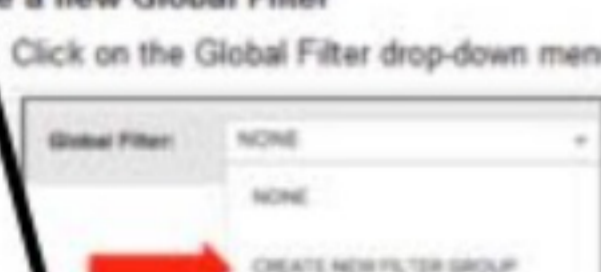


The Global Filter drop-down menu now appears in the upper left of the study.

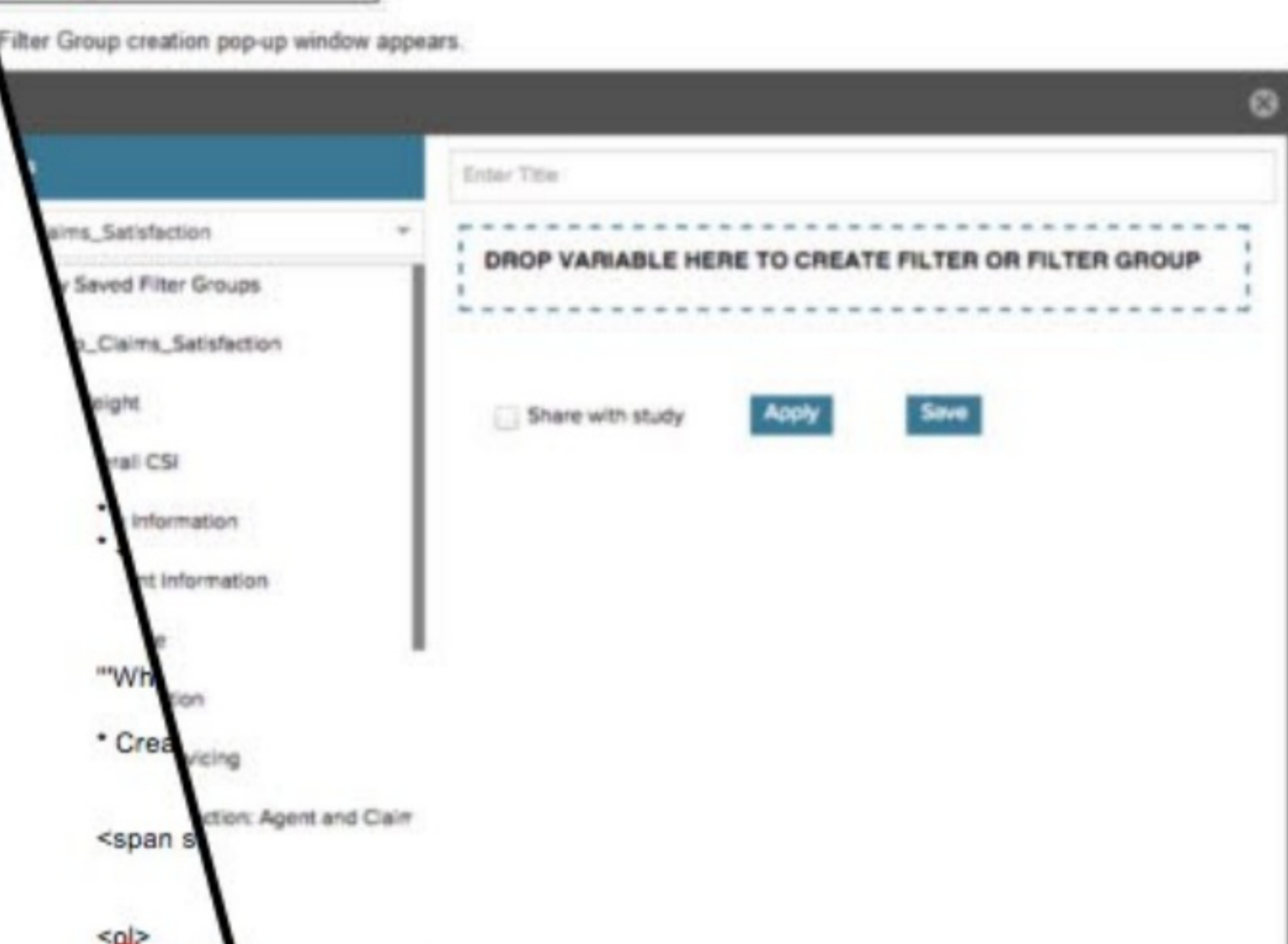


## Create a new Global Filter

Click on the Global Filter drop-down menu, then select "Create New Filter Group."



Filter Group creation pop-up window appears.



Log in to the platform and enter a name for the Global Filter you are creating

Access the Filters list on the left to the drop zone on the right.

Select the "Share with study" check box to make your newly created filter available to all study users for selection from the Global Filter

Enable the "share with study," the global filter will only be available to you

When selected, only the original creator of the Global Filter can edit it

Click the "Apply" button to apply your newly created Global Filter to the study one time (the filter will not be saved to the system and thus will not be available for

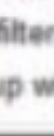

selection from the drop-down menu, nor will it be saved to the "My Saved Filter Groups" folder in the study's filters/variables list).

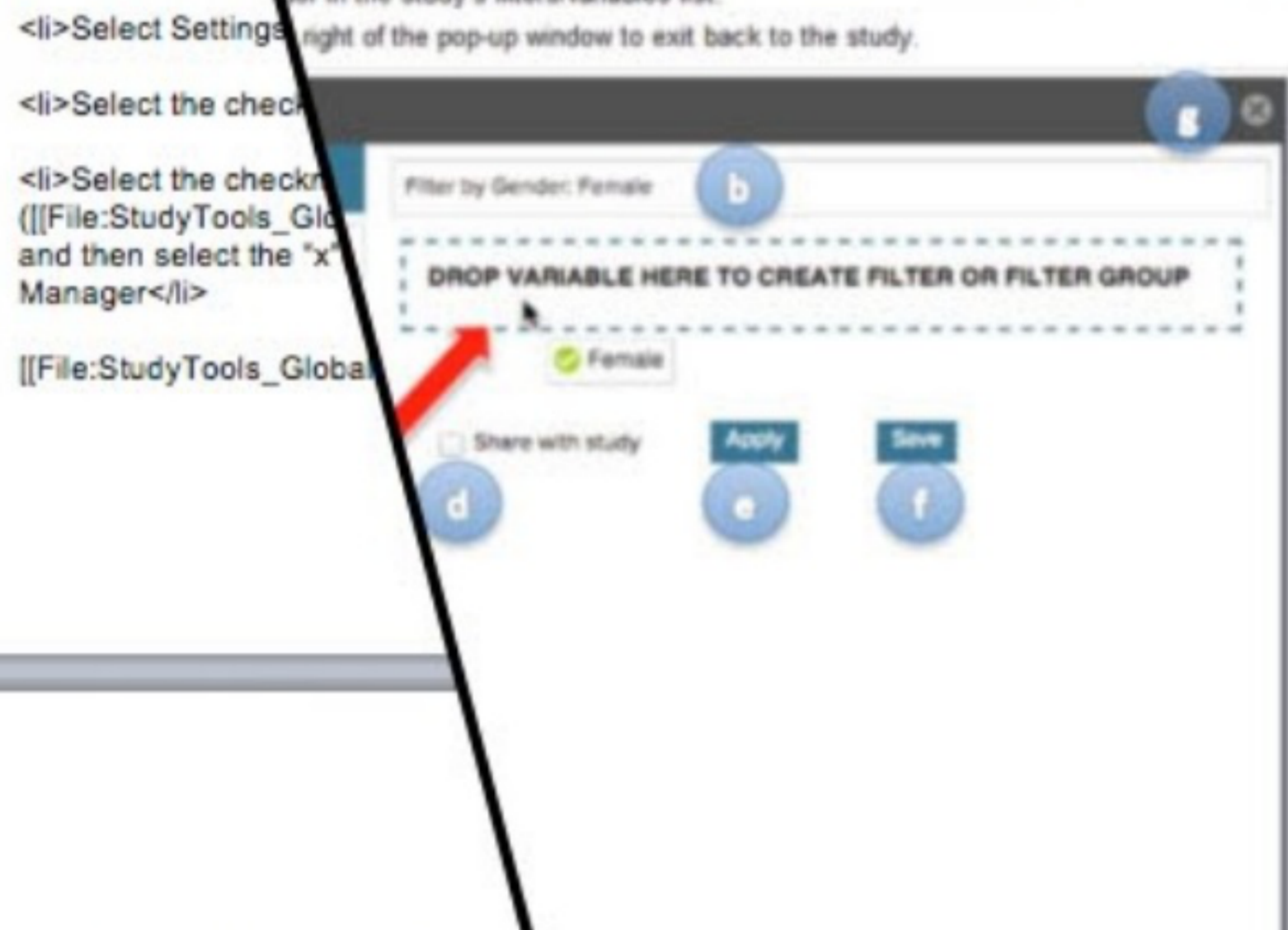
Click the "Save" button to save your filter. It will now be available for selection in the Global Filters drop-down menu. It will also be made available for selection

from the study's filters/variables list.

Select Settings from the right of the pop-up window to exit back to the study.

Select the checkmark

Select the checkmark in the upper right-hand corner (  ) to save changes and return to the study and then select the "X" (  ) to exit Study Manager



The Global Filter drop-down menu now appears in the upper left of the study.

Click on the Global Filter drop-down menu, then select the Global Filter you wish to apply. In the below example, the Global Filter is set to "Female."

Click on the "Enter Title" field and enter a name for the Global Filter you are creating

Drag and drop variable(s) from the Filters list into the drop zone on the right.

(Optional) As an admin, you can select the "Share with study" check box to make your newly created filter available to all study users for selection from the Global Filter

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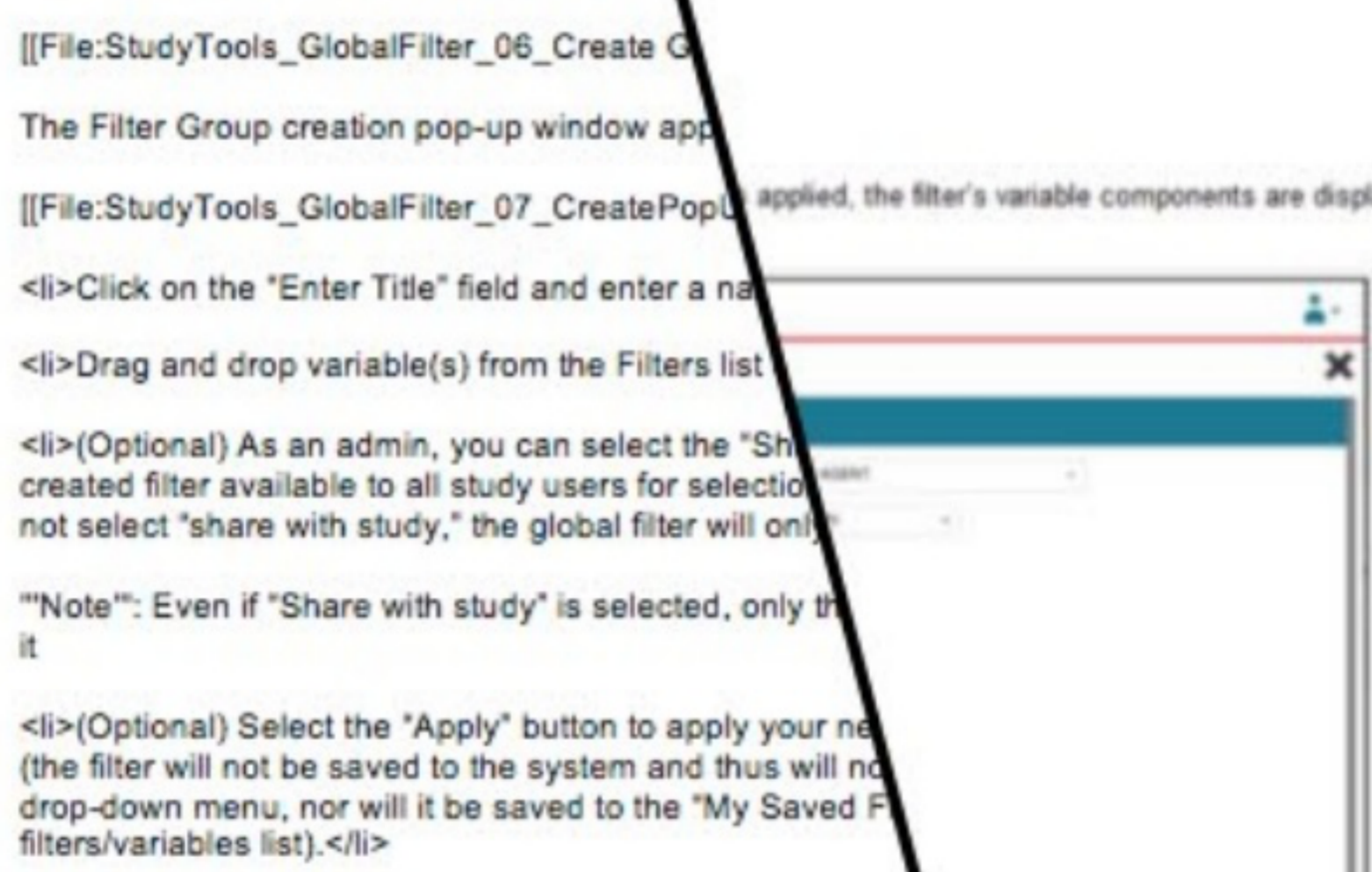
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When applied, the filter's variable components are displayed at the bottom of the chart's "Chart Filters and Assets" section.

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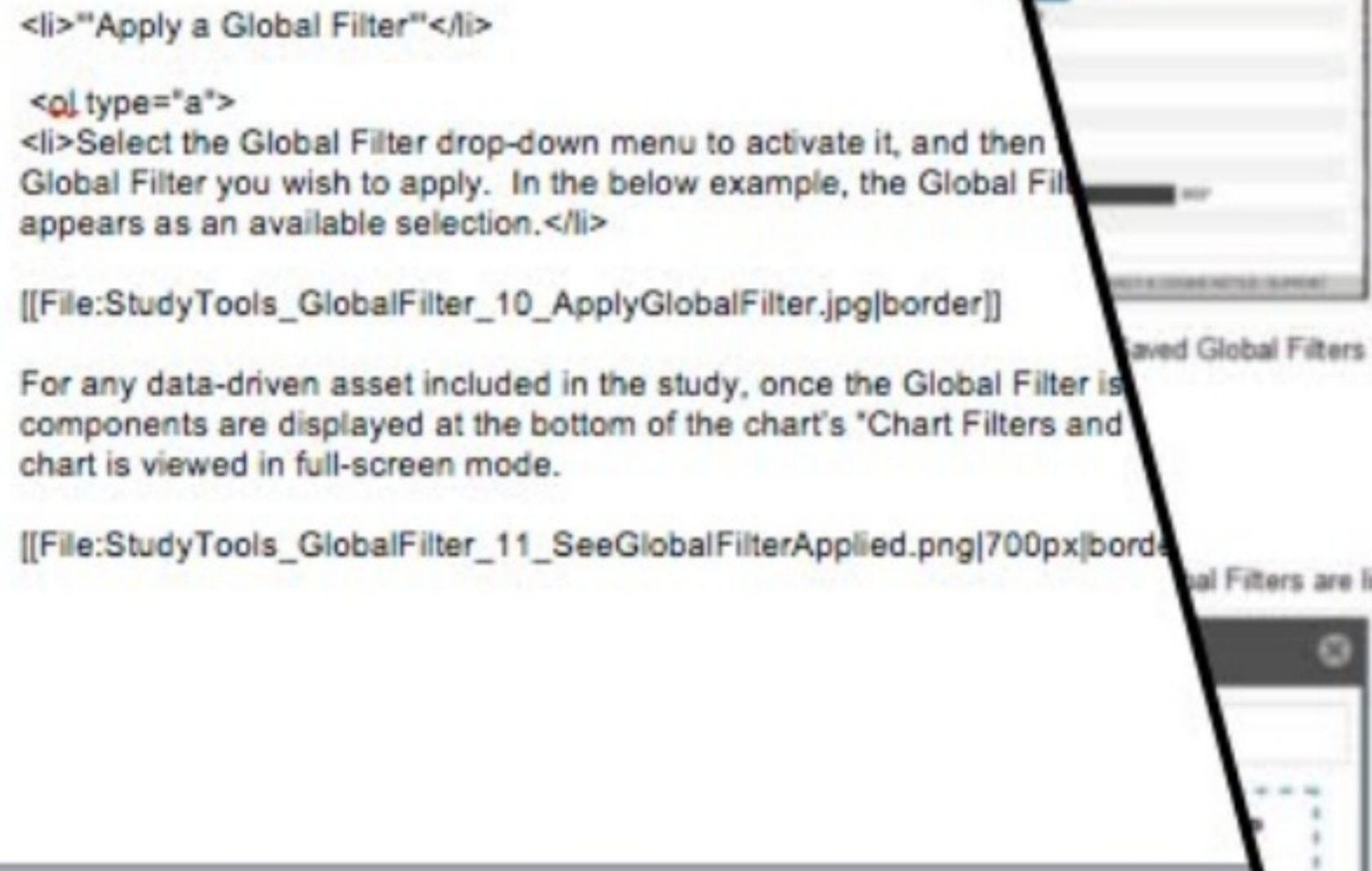
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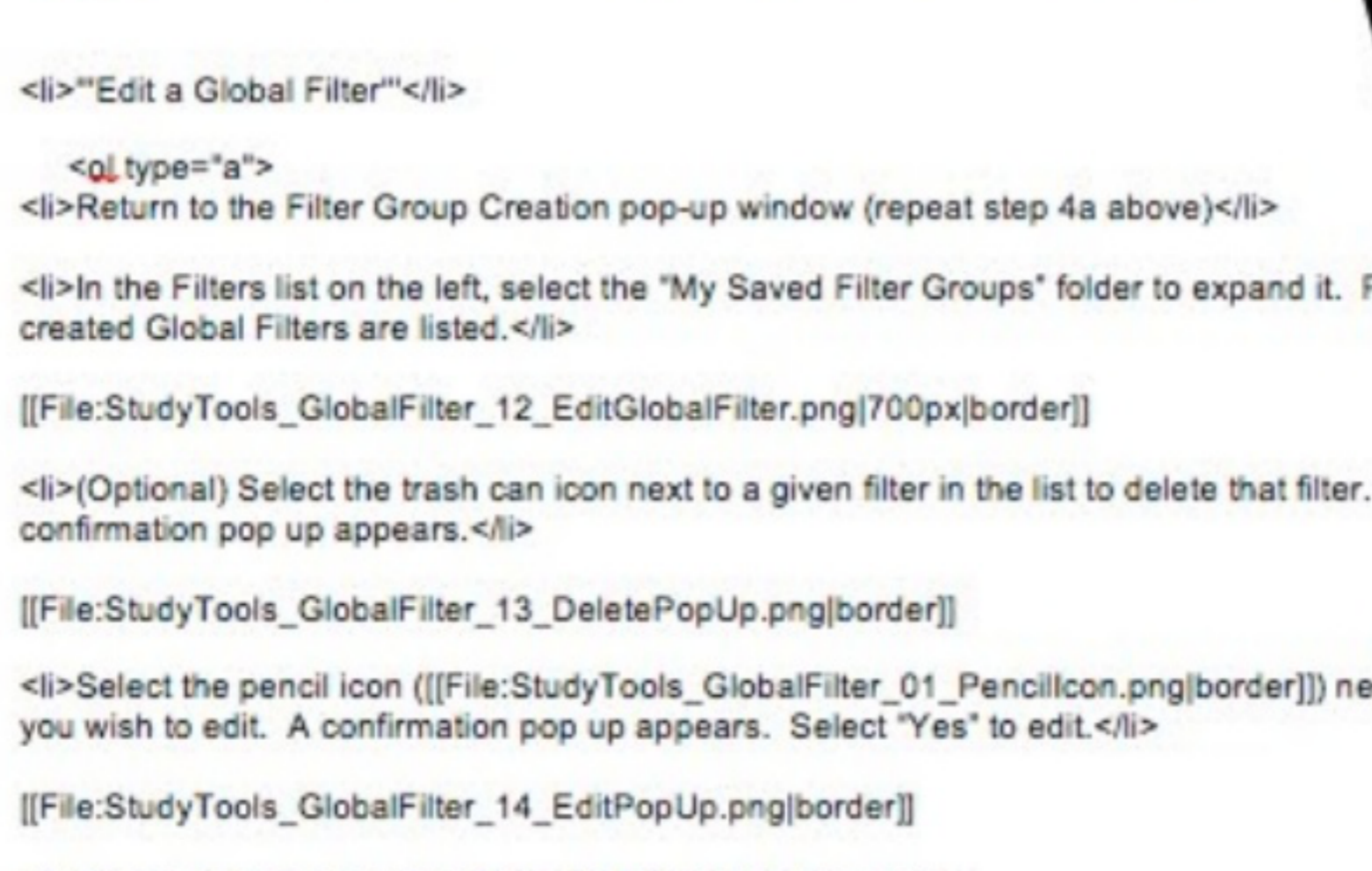
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