

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

What needs to occur before this step can start

MDM and data load complete

Study Manager setup complete

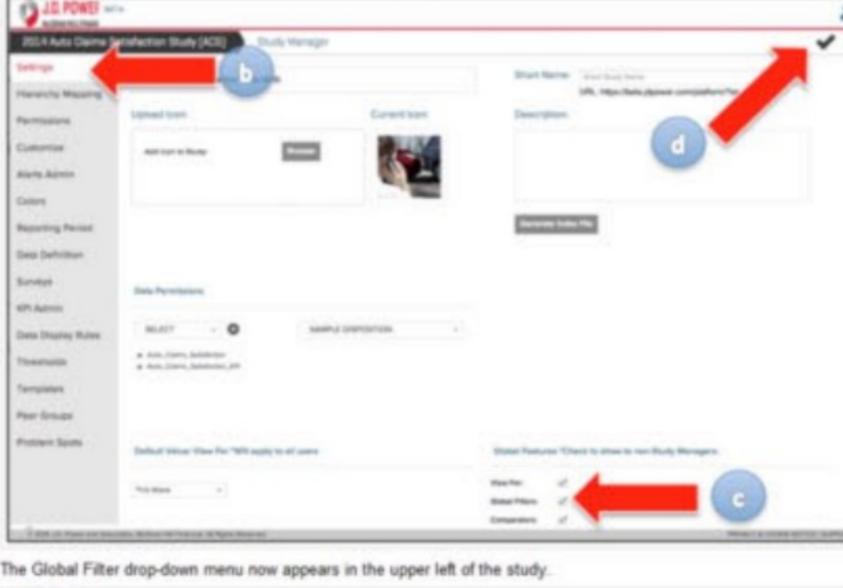
Create a new global filter that can be applied to a study for all users to access

What happens during this step

Tasks

- Log in to the platform
- 2. Access the study and its dashboard
- Enable the Global Filter feature for Non-Study Managers (Global Filter is always enabled for Study Managers)
 - Access the Study Manager by selecting the Pencil icon () Select Settings from the menu on the left.

 - Select the checkbox next to "Global Filters:" in the lower right of the screen.
 - 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





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

te a new Global Filter

NONE.

NONE **Global Filter**



"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 thect "share with study," the global filter will only be available to you Study Manage s selected, only the original creator of the Global Filter can edit it

n 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 type="a">

and enter a name for the Global Filter you are creating

<Ii>Access the Sdown menu, nor will it be saved to the "My Saved Filter Groups" folder in the study's filters/variables list). ([[File:StudyToolso 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 fer in the study's filters/variables list. Select Settings right of the pop-up window to exit back to the study.

Select the checkr Filter by Gender: Female ([[File:StudyTools_Gld



[[File:StudyTools_GlobalFilter_05_Std </01>

Select the check

"Create a new Global Filter" type="a"> Click on the Global Filter drop-down m

from the displayed list, select the Global Filter you wish to apply. In the below example, the Global Filter

[[File:StudyTools_GlobalFilter_06_Create G The Filter Group creation pop-up window app

applied, the filter's variable components are displayed at the bottom of the chart's 'Chart Filters and [[File:StudyTools_GlobalFilter_07_CreatePopt Click on the "Enter Title" field and enter a na

(Optional) As an admin, you can select the "Sh created filter available to all study users for selection not select "share with study," the global filter will only

Select the "X" icon ([[File:StudyTools GlobalFilter 08 Cld

of the pop-up window to exit back to the study.

appears as an available selection.

Drag and drop variable(s) from the Filters list

"Note": Even if "Share with study" is selected, only the (Optional) Select the "Apply" button to apply your ne (the filter will not be saved to the system and thus will no drop-down menu, nor will it be saved to the "My Saved F filters/variables list). (Optional) Select the "Save" button to save your filter. Global Filters drop-down menu. It will also be made availab Groups" folder in the study's filters/variables list.

[[File:StudyTools_GlobalFilter_09_CreatePopUpMarked.png]70 </01> "Apply a Global Filter" type="a">

For any data-driven asset included in the study, once the Global Filter is components are displayed at the bottom of the chart's "Chart Filters and chart is viewed in full-screen mode.

[[File:StudyTools_GlobalFilter_10_ApplyGlobalFilter.jpg|border]]

Select the Global Filter drop-down menu to activate it, and then Global Filter you wish to apply. In the below example, the Global Filt

[[File:StudyTools_GlobalFilter_11_SeeGlobalFilterApplied.png|700px|border al Filters are listed.

wed Global Filters are found in a study's filters list in the "My Saved

Return to the Filter Group Creation pop-up window (repeat step 4a above)

In the Filters list on the left, select the "My Saved Filter Groups" folder to expand it. Previously.

(Optional) Saved Global Filters are available to be applied (i.e., dragged and drop) assets. Saved Global Filters are found in a study's filters list in the "My Saved Filter G

[[File:StudyTools GlobalFilter 12 EditGlobalFilter.png]700px[border]] (Optional) Select the trash can icon next to a given filter in the list to delete that filter. A

created Global Filters are listed.

"Edit a Global Filter"

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confirmation pop up appears. [[File:StudyTools_GlobalFilter_13_DeletePopUp.png|border]]

Select the pencil icon ([[File:StudyTools_GlobalFilter_01_Pencillcon.png|border]]) next to the File. you wish to edit. A confirmation pop up appears. Select "Yes" to edit. [[File:StudyTools_GlobalFilter_14_EditPopUp.png|border]]

[[File:StudyTools_GlobalFilter_15_PopUpInEditMode.png|550px|border]] </01>

Once in edit mode, follow steps 4b through 4g above.

"Turn off Global Filter" Click on the Global Filter drop-down menu, and then select "None."

[[File:StudyTools_GlobalFilter_16_TurnOffGlobalFilter.png|border]]