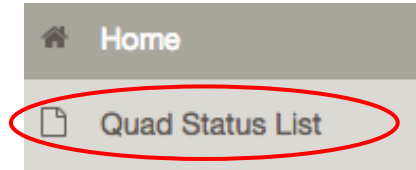


Preclinical Faculty Quad Status Database User Guide

<http://apex.hms.harvard.edu>

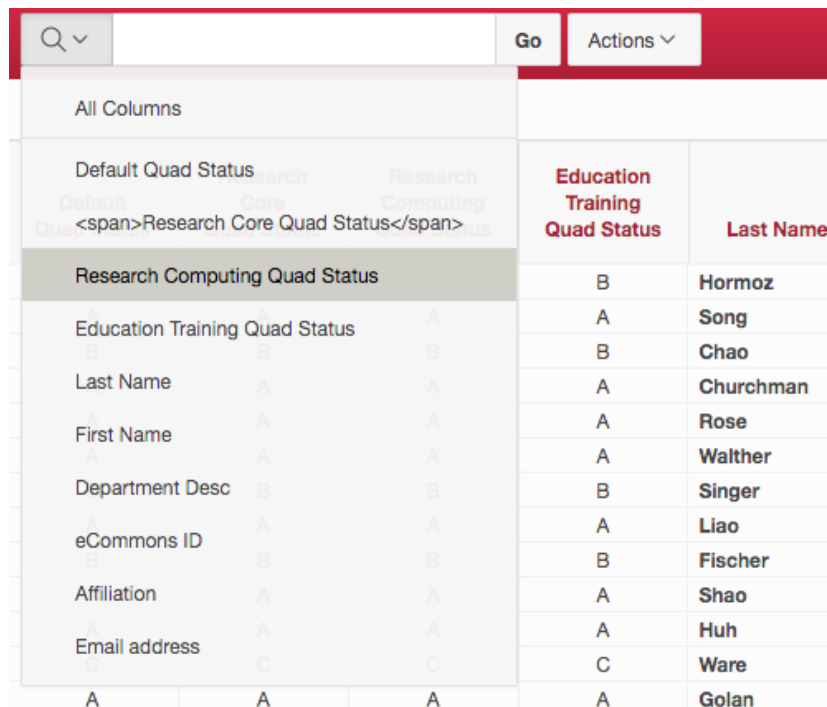
Getting Started

- Login to the APEX application portal at the URL listed above
- Click on the Preclinical Faculty Quad Status Database tile to open the application
- Click Quad Status List on the left side of the screen to open the report



Searching for Records

- The search bar can be used to search for text in any column of a report
- Any record containing the search text will be returned
- Specific columns can be searched by using the search bar drop down menu



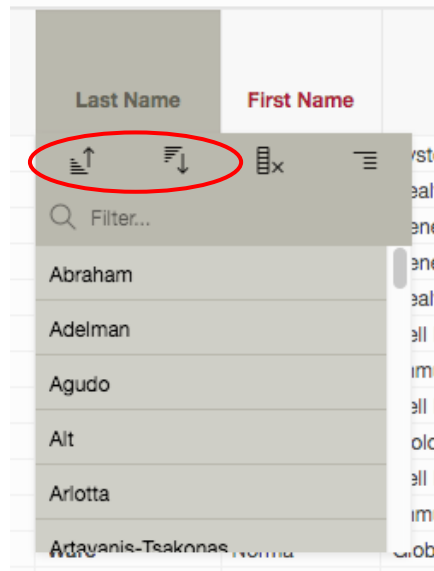
Education Training Quad Status	Last Name
B	Hormoz
A	Song
B	Chao
A	Churchman
A	Rose
A	Walther
B	Singer
A	Liao
B	Fischer
A	Shao
A	Huh
C	Ware
A	Golan

Customizing Reports

- The Quad Status List can be filtered and sorted to show different fields and groupings of data
- For Viewers, data cannot be edited, but changes to the view of a list can be saved

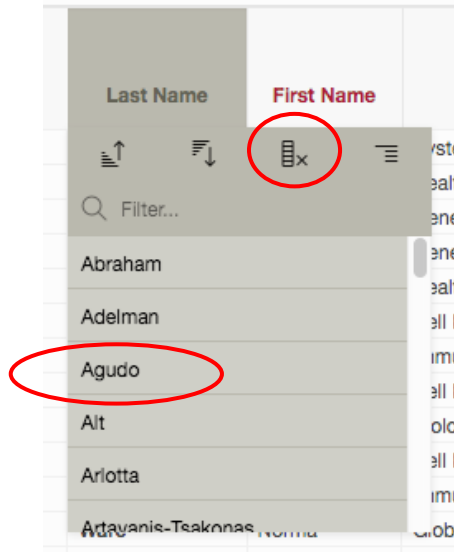
Sorting Columns in a Report

- Clicking on the column header of any column in a report brings up a menu allowing a user to sort and filter by that column
- Click on either the Sort Ascending or Sort Descending button to sort the entire list by that column



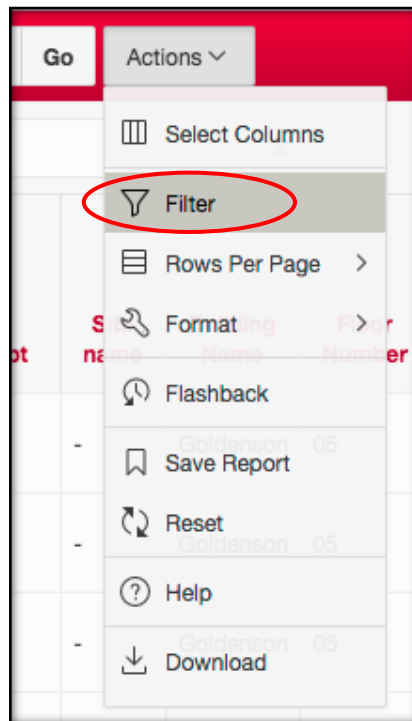
Simple Filtering

- Clicking on the column header of any column in a report brings up a menu allowing a user to sort and filter by that column
- Click on a value in the drop down list to filter the column by that value
- To remove a column from a report, click the Hide Column button



Advanced Filtering

- Additional filtering options are available through the “Actions” button at the top of any report
- In the Actions menu, click “Filter” to open a window where parameters can be set



- Operators such as equals and does not equal can be used

Filter [X]

Filter Type Column Row

Column: Affiliation Operator: does not contain Expression: Beth Israel Deaconess Medical Ce

Cancel Apply

Removing Filters

- As different filters are set, they will be listed at the top of the report
- To remove a filter, click the “X” next to the filter to be removed

Department Desc = 'Biological Chemistry & Molecular Pharmacology' [X]

Default Quad Status = 'A' [X]

Data Headings

- A basic list can be broken apart into various headings based on unique values in a column
- The headings can then be used to see a total for all the records under that heading
- For example, we can group together the faculty who are in each department
- Click the “Actions” button, and then go to Format → Control Break
- Choose the column that you want to group by

Control Break
✕

	Column	Status
1	Department Desc	Enabled
2	- Select Column -	Enabled
3	- Select Column -	Enabled
4	- Select Column -	Enabled
5	- Select Column -	Enabled
6	- Select Column -	Enabled

Cancel Apply

- The result will be a view where each record is included under its proper Tier 4 Sub Department

Department Desc : Biomedical Informatics								
Default Quad Status	Research Core Quad Status	Research Computing Quad Status	Education Training Quad Status	Last Name	First Name	eCommons ID	Affiliation	Email address
C	C	C	C	Wright	Adam	AW70	Harvard Medical School	awright5@partners.org
A	A	A	A	Baym	Michael	MHB15	Harvard Medical School	baym@hms.harvard.edu
A	A	A	A	Park	Peter	PJP8	Harvard Medical School	peter_park@hms.harvard.edu
C	C	C	C	Brownstein	John	JSB25	Harvard Medical School	john.brownstein@childrens.harvard.edu
A	A	A	A	Patel	Chirag	CP179	Harvard Medical School	Chirag_Patel@hms.harvard.edu
A	A	A	A	Avillach	Paul	PA91	Harvard Medical School	paul_avillach@hms.harvard.edu
A	A	A	A	Li	Heng	HL141	Harvard Medical School	Heng_Li@hms.harvard.edu

Aggregating Data

- Number values can also be calculated in the report
- Continuing with the example above, we can total the number of faculty in each department
- Click the “Actions” button, and then go to Format → Aggregate
- Select the function and column that you want to calculate

Aggregate
✕

Aggregation - New Aggregation -

Function Count

Column Last Name

Cancel Apply

- The result will be a view where the number of faculty will be totaled for each department
- The total will show under the column that was calculated at the end of each break
- To remove an aggregation, click the “Actions” button, and then go to Format → Aggregate
- Select the aggregation to be removed from the “Aggregation” drop down list and then click “Delete”

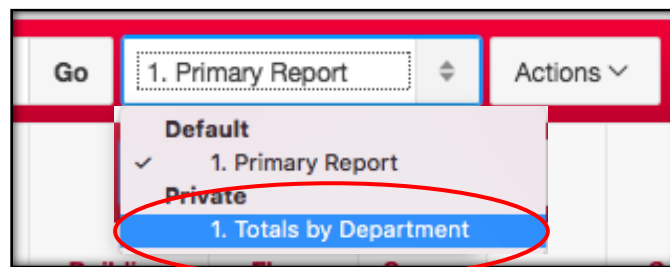
Saving Reports

- Filtering, grouping, and calculations on a report can be saved so that the results can be retrieved at a later date without having to recreate all of the parameters
- To save the view of a report, click the “Actions” button, and then go to Save Report
- Give the report a name and description and click “Apply”

- The report is now saved for future use

Recalling a Saved Report

- If your custom report is not showing, click the drop down menu next to the search bar and choose your saved report



- Any setting you had previously saved to the report will be applied
- Click the Primary Report option to return to the default report view

Exporting Data

- The current view of any report can be exported into Excel, but formatting such as control breaks may not be retained
- To export a report, click the “Actions” button, and then go to Download
- Choose the icon for the file format you need

