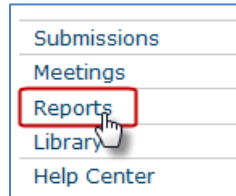


Working with Reports

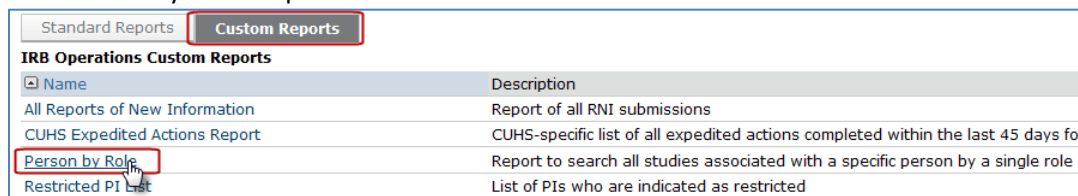
IRB staff and committee members can search for all studies associated with a person in ESTR. This is a complex report which requires special use.

1. When logged in to ESTR, click “Reports” on the lower-left side of the page

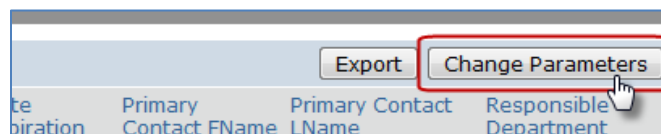


2. From the IRB Reports page, select the “Custom Reports” tab

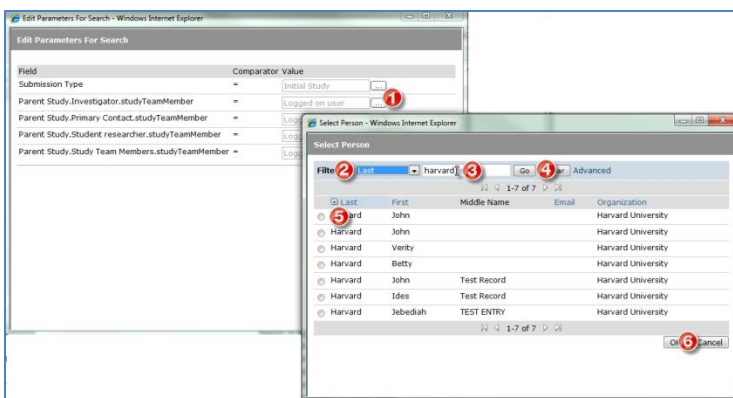
3. Click the “Person by Role” report



4. The report will automatically open in a new window and will display the items where the individual who is logged in is listed as PI, Primary Contact, Faculty Sponsor, or Study Team Memberⁱ
5. Click “Change Parameters” at the upper right of the pop-up to set the search for a different person by role



6. Follow the steps to set a parameter



1. Click the ellipses (...)
2. Select a search criteria from the filter by dropdownⁱⁱ
3. Type in the information to search
4. Click “Go”
5. Click the radio button beside the correct person
6. Click “OK” and the pop up will close

This filter by search works just like all other areas of the system. See the [“Working with Reports”](#) for more details.

Important! Search for a person by ONE ROLE AT A TIME. Searching for more than one role at a time will cause the system to slow down significantly.



7. Click “OK” on the Edit Parameters pop up and the search pop up will refresh with the new results
8. To start over, either close (a) all pop ups and click back in, or (b) click “Change Parameters” and “reset”



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- ⁱ PI, Primary Contact, Faculty Sponsor or Study Team Member are the only roles applied in this search.
 - ⁱⁱ Search type allows for the following criteria:
 - Last = Person Last Name
 - First = Person First Name
 - Email = HUID-Associated Email
 - Organization = not useful search criteria, do not use
 - User ID = HUID
 - Project ID = not useful search criteria, do not use