

Step 7: Generate and Download Reports

Generate and Download Reports

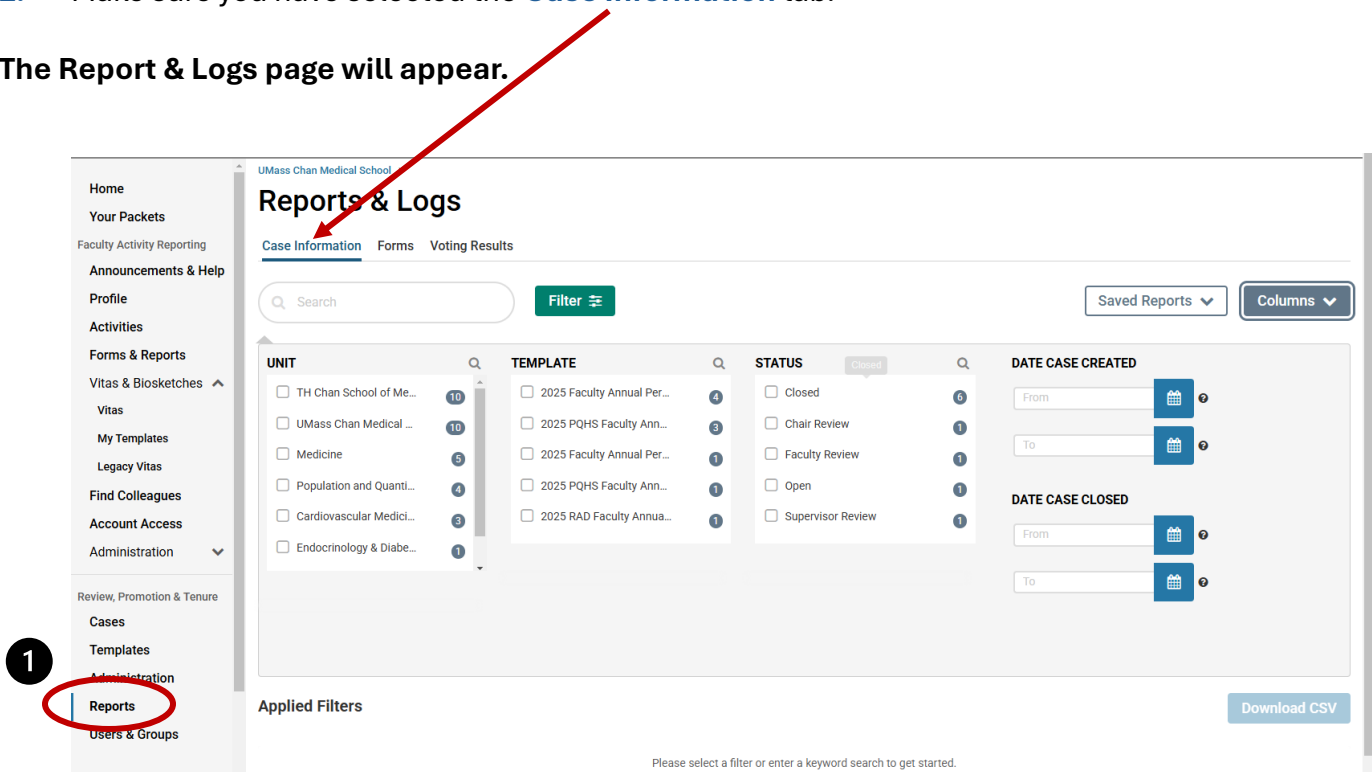
Unit Administrators can navigate to the **Reports** page, and select the **Case Information** tab to run reports to gather data and status information on their APR cases.

Case Information reports allow for the creation of customized reports to gather data on customized criteria for one or more packets (cases) within one or more units (departments) for a specified date range. Case Information reports are a list of all the cases at the institution or departmental/unit level.

It is **recommended** that unit administrators use the optional job aid **Using Statuses to Track APRs**.

1. Click **Reports** in the left-hand navigation bar under Review, Promotion & Tenure.
2. Make sure you have selected the **Case Information** tab.

The Report & Logs page will appear.



Unit administrators can select the **Unit**, **Template** name, **Status** and **data range** for the data they want to select.

Interfolio Step 7 Job Aid: Faculty Annual Performance Review

- To search for your **unit**, enter the name of your **department** in the search field at the top of the unit filter box. Select the desired **checkbox**. In this case Population and Quantitative Health Sciences.
- Enter your department's abbreviation in the search box above the **Template** filter box. Select the desired **checkbox**.
- Enter the begin and end dates into the **DATE CASE CREATED** field or enter the begin and end dates for the **DATE CASE CLOSED** field depending on the data you want to pull.
- Select the **Columns** dropdown to specify the columns that appear on the report.

UMass Chan Medical School >

Reports & Logs

Case Information Forms Voting Results

The screenshot shows the 'Reports & Logs' interface. A search bar at the top left contains the text 'population'. Below it, a dropdown menu is open, showing 'Population and Quantita...' with a checkbox. To the right, a 'Filter' button is visible. Further right, a search box contains 'PQHS' and a dropdown menu is open, showing '2025 PQHS Faculty Ann...' with a checkbox. In the center, there is a 'STATUS' section with checkboxes for 'Closed', 'Chair Review', 'Faculty Review', 'Open', and 'Supervisor Review'. To the right, there are two date selection sections: 'DATE CASE CREATED' with 'From' and 'To' fields, and 'DATE CASE CLOSED' with 'From' and 'To' fields. At the top right, there are 'Saved Reports' and 'Columns' dropdown menus. Red circles and numbers 4, 5, and 6 highlight these specific elements.

- Check the box next to the columns you want to show on your report.
- You can click **Save** under the *Applied Filters* section to save the filters and columns of the currently displayed report to be reloaded later.

Chan SCHOOL

The screenshot shows the 'Reports & Logs' interface with the 'Columns' dropdown menu open. The dropdown menu is titled 'Columns' and has a 'Restore Default' button. It contains a search bar and a list of columns with checkboxes: 'Case ID', 'Closed', 'Closed Date', 'Created Date', 'First Name', and 'Last Name'. A red circle and number 7 highlight this dropdown menu. Below the filters, there is an 'Applied Filters' section with two filter tags: 'Population and Quantitative Health Sciences' and '2025 PQHS Faculty Annual Performance Review Supervi...'. A 'Save' button is circled in red with a number 8. At the bottom, there is a 'Download CSV' button. Below the filters, it says 'Showing 3 of 3 results' and a table with 8 columns: Case ID, First Name, Last Name, Unit, Created Date, Closed Date, Status, and Closed.

Case ID	First Name	Last Name	Unit	Created Date	Closed Date	Status	Closed
684900	Faculty	Member 2	Population and Quantitative Health Sciences	Jan 28, 2025	Jan 28, 2025	Closed	No
686559	Faculty	Member 2	Population and Quantitative Health Sciences	Jan 29, 2025	Jan 31, 2025	Faculty Review	No
688067	Faculty	Member 2	Population and Quantitative Health Sciences	Jan 31, 2025	Feb 1, 2025	Chair Review	No

- 9) A pop-up menu will appear. Fill in the **Report Name** field which is required and click the **Save** button.

Save Report [X]

Report Name *

PQHS Chair case report

Filters

Population and Quantitative Health Sciences

2025 PQHS Faculty Annual Performance Review Supervisor

Columns

Case ID, First Name, Last Name, Unit, Created Date, Closed Date, Status, Closed, Current Rank, Department,

Share Report

Yes, make this report available to any administrator or committee manager who has access to the information.

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Save Cancel

- 10) **Reports on form responses** (e.g. Candidate/Faculty or Committee Forms) can be run for one or more packets in one or more units within a specified date range. In this case we selected from the APR's **General Information form**, the faculty members **Rank and Department**.

UNIT

Population and Quantita... 3

TH Chan School of Medi... 3

UMass Chan Medical Sc... 3

TEMPLATE

2025 PQHS Faculty Ann... 3

STATUS

Chair Review 1

Closed 1

Faculty Review 1

DATE CASE CREA

From

To

DATE CASE CLOS

From

To

Columns

Restore Default

SEARCH

SELECTED

AVAILABLE

Forms

GENERAL INFORMATION

HEALTH CARE DELIVERY PERFOR...

LEADERSHIP POSITIONS AND RES...

EFFORTS TO SUPPORT DIVERSITY

PROFESSIONAL AND FACULTY...

Done

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Download CSV

Applied Filters

Population and Quantitative Health Sciences x 2025 PQHS Faculty Annual Performance Review Supervisor x Save

Clear Filters

Showing 3 of 3 results

Case ID	First Name	Last Name	Unit	Created Date	Closed Date	Status	Closed	Current Rank	Department
684900	Faculty	Member 2	Population and Quantitative Health Sciences	Jan 28, 2025	Jan 28, 2025	Closed	No	Assistant Professor	PQHS
686559	Faculty	Member 2	Population and Quantitative Health Sciences	Jan 29, 2025	Jan 31, 2025	Faculty Review	No	Assistant Professor	PQHS
688067	Faculty	Member 2	Population and Quantitative Health Sciences	Jan 31, 2025	Feb 1, 2025	Chair Review	No	Assistant Professor	PQHS

To download a **Report**, click the **Download CSV** button. A pop-up window will appear. Give the file a name and **save** it to your computer. CSV files can be easily converted to an excel spreadsheet.

Applied Filters

Population and Quantitative Health Sciences | 2025 PQHS Faculty Annual Performance Review Supervisor | Save

Clear Filters

Showing 3 of 3 results

Case ID	First Name	Last Name	Unit	Created Date	Closed Date	Status	Closed
684900	Faculty	Member 2	Population and Quantitative Health Sciences	Jan 28, 2025	Feb 16, 2025	Closed	Yes
686559	Faculty	Member 2	Population and Quantitative Health Sciences	Jan 29, 2025	Jan 31, 2025	Faculty Review	No
688067	Faculty	Member 2	Population and Quantitative Health Sciences	Jan 31, 2025	Feb 1, 2025	Chair Review	No

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