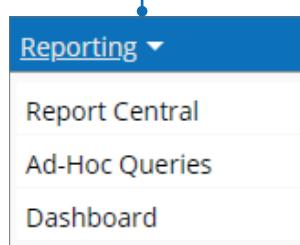




Navigation

Access **Report Central**, **Ad-Hoc Queries**, and the **Dashboard** tool through the Reporting menu.



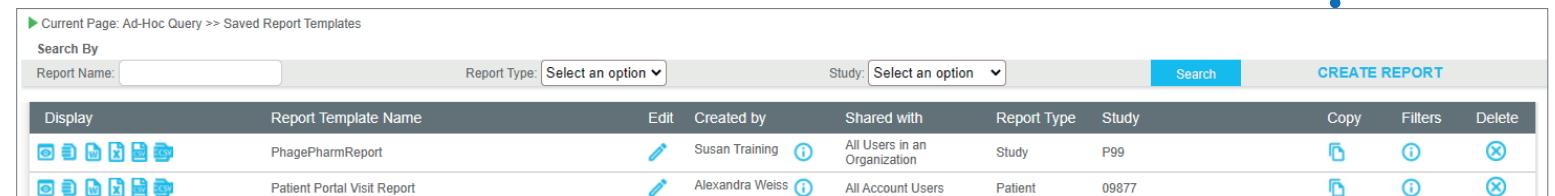
Report Central

Report Central offers a wide variety of out-of-the-box reports that provide account, financial, patient, and study information.



Ad-Hoc Query Browser

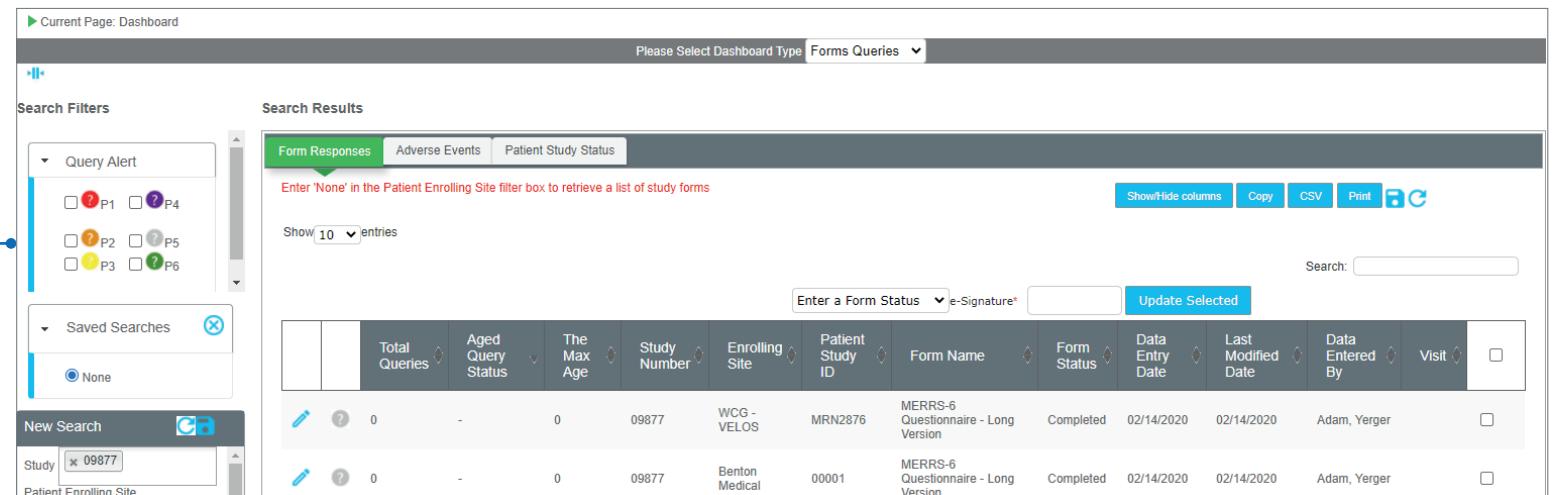
The **Ad-Hoc Query** browser allows users to create and save custom reports based on system datasets, user-created forms, and fields.

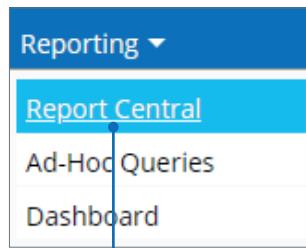


Dashboard Tool

The **Dashboard** tool allows users to monitor key data in the following three areas:

- Form Responses
- Adverse Events
- Patient Study Status





From the **Reporting** dropdown, select **Report Central**.

Current Page: Report Central

Select Report Type: Accrual

Available filters for this Report Type are:

Date Filter:
 All Year Month Date Range
 [All]

Additional Filters:
 Select Study [ALL]
 Select Organization WCG - VELOS

Do not display selected filters in Report Header

Accrual Reports

- Accrual Performance Overview
- Accrual by Study Site and Patient Status
- Accrual by Year
- Annual Accrual Trend (By Study/Site)
- Annual Accrual Trend (Study Level/ All Sites)
- Enrollment by Race / Ethnicity /Gender
- Studies with No Enrollment

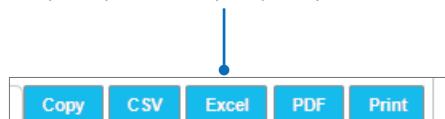
NCI Reports

- Data Table 3
- Data Table 4

Display **Download as CSV**

Export Reports

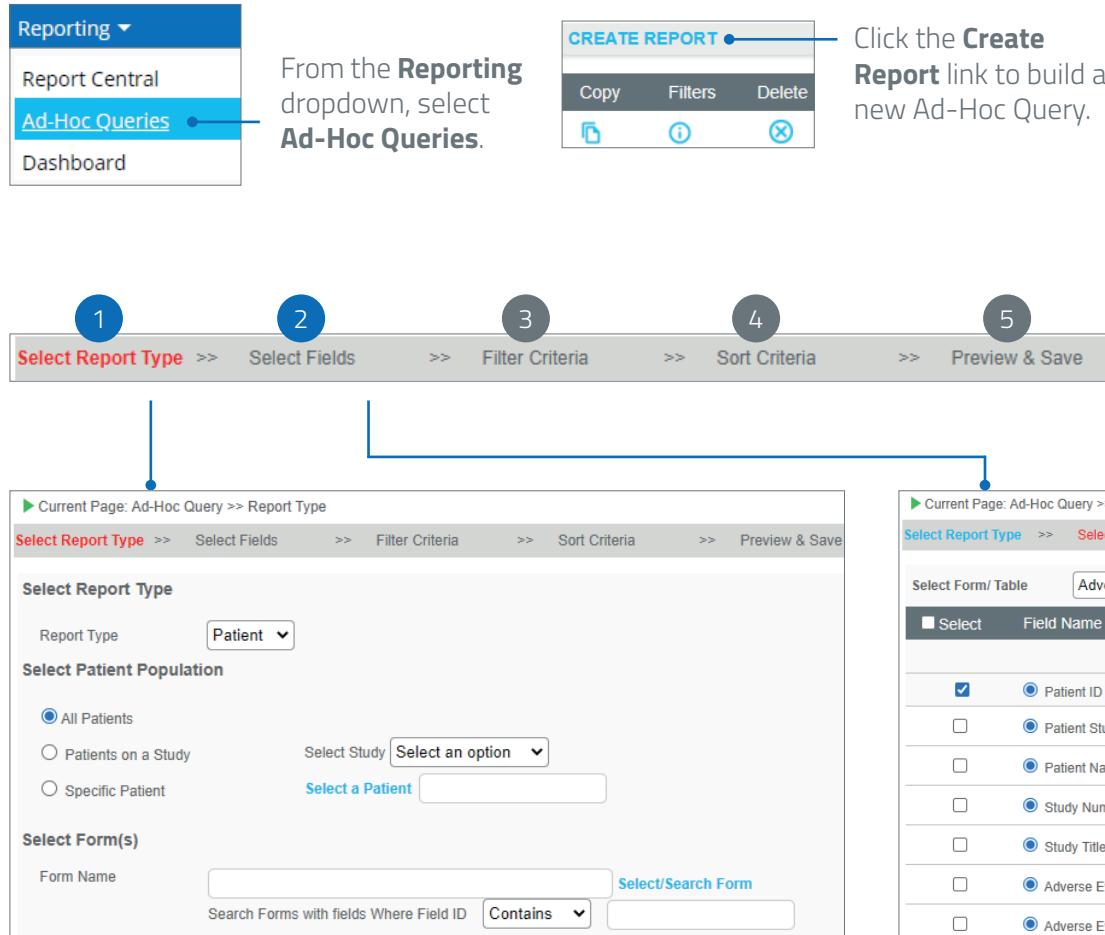
After generating a report, you can export or print a copy by clicking on one of the available options at the top of the page. *Note: Export options may vary across specific reports.*



- Select Report Type** – Select a Report Type from the dropdown menu.
- Report List** – Select a report from the available options. Options change depending on the report type selected.
- Filters** – Apply filters to the report as needed.
- Display** – Pull the report by clicking the Display button.
- Download as CSV** – Click to export a CSV version of the report with applied filters.

Ad-Hoc Queries

Ad-hoc queries are used to create custom reports from the patient, study, and account domains. Ad-hoc queries are the only means to pull data captured by Account, Study, or Patient forms.



From the **Reporting** dropdown, select **Ad-Hoc Queries**.

Click the **Create Report** link to build a new Ad-Hoc Query.

Configure all five elements of your ad-hoc query.

- 1 Select Report Type
- 2 Select Fields
- 3 Filter Criteria
- 4 Sort Criteria
- 5 Preview & Save

Current Page: Ad-Hoc Query >> Report Type

Select Report Type

Report Type: Patient

Select Patient Population

All Patients (radio button selected)

Patients on a Study

Specific Patient

Select Study: Select an option

Select a Patient: Select a Patient

Select Form(s)

Form Name: Select/Search Form

Search Forms with fields Where Field ID Contains: Contains

Current Page: Ad-Hoc Query >> Field Selection

Select Report Type

Select Form/ Table: Adverse Events

Select Field ID as 'Display Name' for all Fields

Display Response Data Value in Report Output

| Select | Field Name | Display Name | Field ID | Field Seq. |
|-------------------------------------|--------------------|--------------------|-----------------------|------------|
| <input checked="" type="checkbox"/> | Patient ID | Patient ID | <input type="radio"/> | 10 |
| <input type="checkbox"/> | Patient Study ID | Patient Study ID | <input type="radio"/> | 20 |
| <input type="checkbox"/> | Patient Name | Patient Name | <input type="radio"/> | 30 |
| <input type="checkbox"/> | Study Number | Study Number | <input type="radio"/> | 40 |
| <input type="checkbox"/> | Study Title | Study Title | <input type="radio"/> | 50 |
| <input type="checkbox"/> | Adverse Event ID | Adverse Event ID | <input type="radio"/> | 60 |
| <input type="checkbox"/> | Adverse Event Type | Adverse Event Type | <input type="radio"/> | 70 |

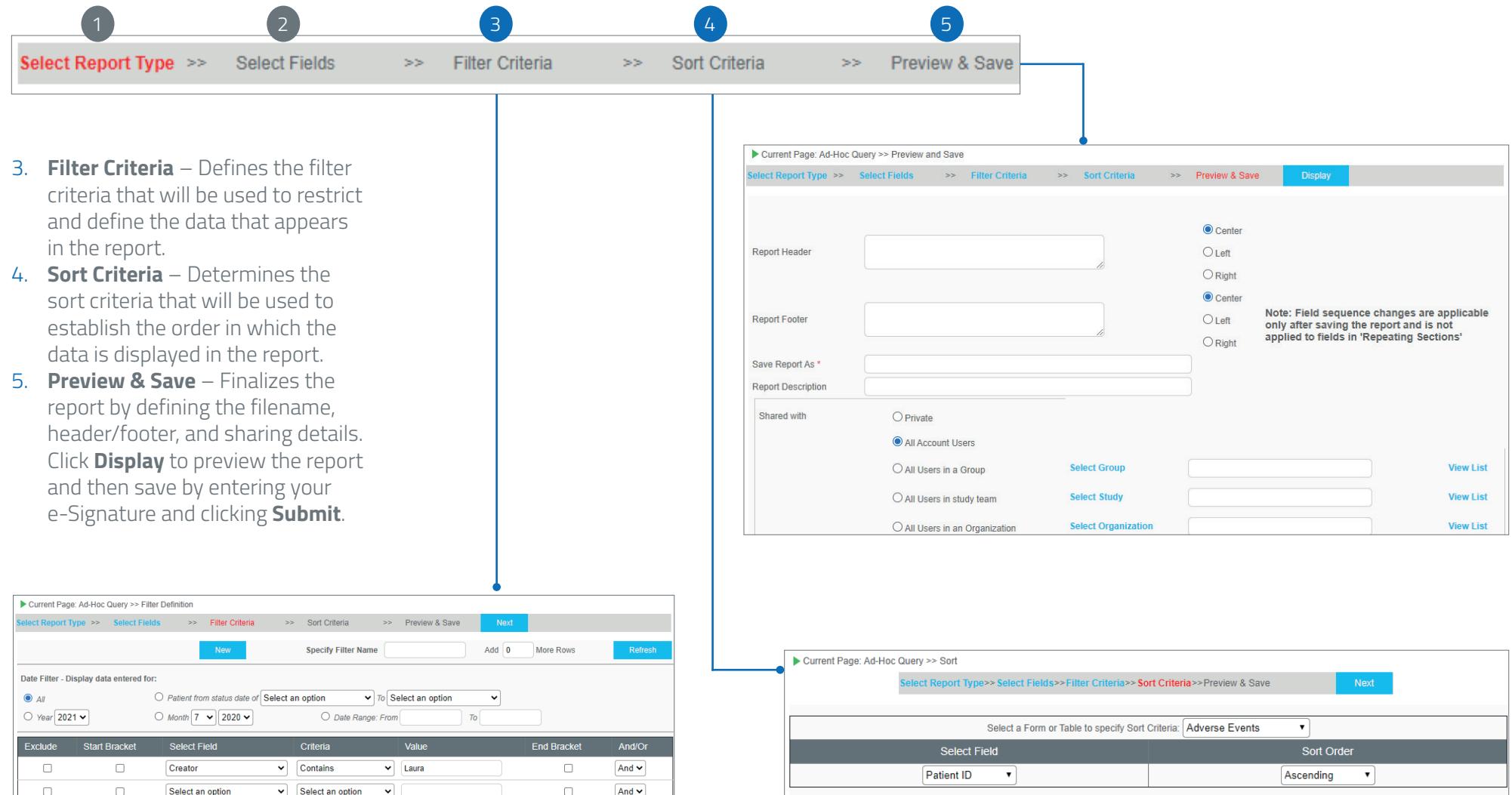
| Report Type | Description |
|-------------|--|
| Study | Pulls data associated with studies. (e.g. budgets, milestones achieved, study arms, etc.) |
| Patient | Pulls data associated with patients. (e.g. Demographics, patient form data, etc.) |
| Account | Pulls data associated with the entire account. (e.g. usage audit, groups, organizations, etc.) |

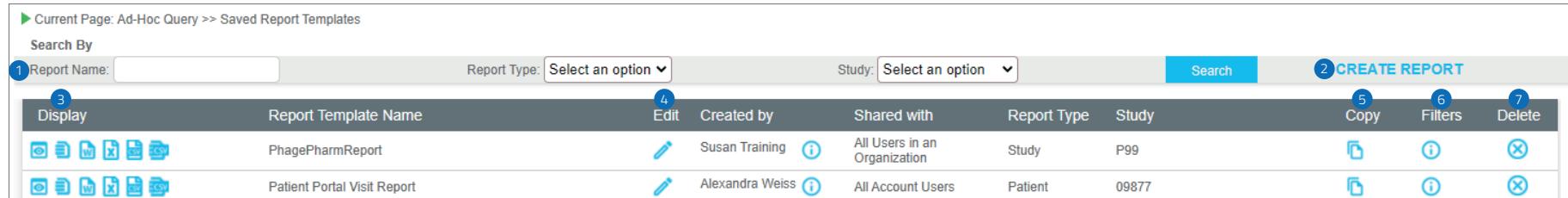
Configure all five elements of your ad-hoc query.

1. **Select Report Type** – Used to define the report type, the report target (e.g. patient population, study, etc.), and any specific forms that the report should use to generate data.
2. **Select Fields** – Used to define the specific fields that will be used to feed the report data output.

Continued on next page

Ad-Hoc Queries (continued)



Ad-Hoc Queries (*continued*)

The screenshot shows a table of saved report templates. The columns are: Report Name, Report Template Name, Created by, Shared with, Report Type, Study, Copy, Filters, and Delete. There are two rows of data:

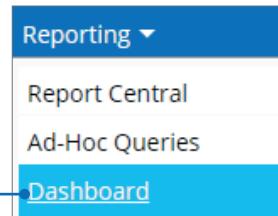
| Report Name: | Report Template Name | Created by | Shared with | Report Type | Study | Copy | Filters | Delete |
|-----------------------------|----------------------|------------------------------|-------------|-------------|-------|------|---------|--------|
| PhagePharmReport | Susan Training | All Users in an Organization | Study | P99 | | | | |
| Patient Portal Visit Report | Alexandra Weiss | All Account Users | Patient | 09877 | | | | |

- 1. Search** – Use the available Report Name, Report Type, and Study fields to search for a specific Ad-hoc query.
- 2. Create Report** – Used to create a new Ad-hoc Query.
- 3. Display and Export** – Display the report in a normal or linear format, or export to a Microsoft Word document or Excel spreadsheet.
- 4. Edit** – Used to modify saved Ad-hoc Queries.
- 5. Copy** – Used to create a copy of an existing Ad-hoc Query.
- 6. View and Delete Filters** – Displays Filters that have been applied to that Ad-hoc Query. There is also an option to delete the filters from the report using this tool (*Note: This is the ONLY place to delete filters*).
- 7. Delete** – Deletes an Ad-hoc Query.

Dashboard Tool

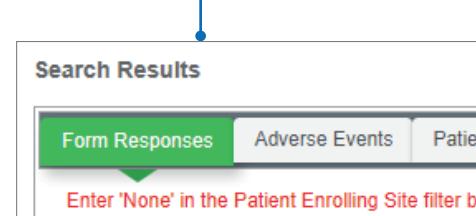
The dashboard tool is used to monitor and manage key data for Form entries, Adverse events, and Patient study statuses.

From the **Reporting** dropdown, select **Dashboard**.



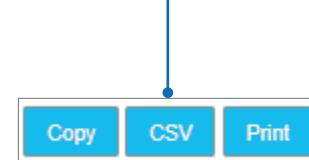
Search Results

Monitor key study data entries under the Form Responses, Adverse Events, and Patient Study Status tabs.



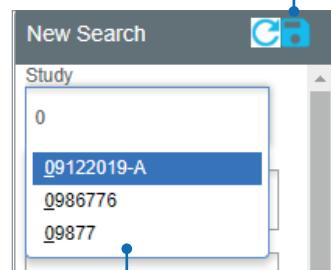
Export Search Results

Click on one of the labeled buttons at the top of the search results page to export the search results table.



Save Searches

Click the **Save** icon to save your search criteria for easy use at a later date.



Study Search

Search one or more studies by typing the study ID into the **New Search** panel.

Response View

View, edit, or open queries for selected form responses, adverse event entries, and patient study statuses using the **Response View** page.

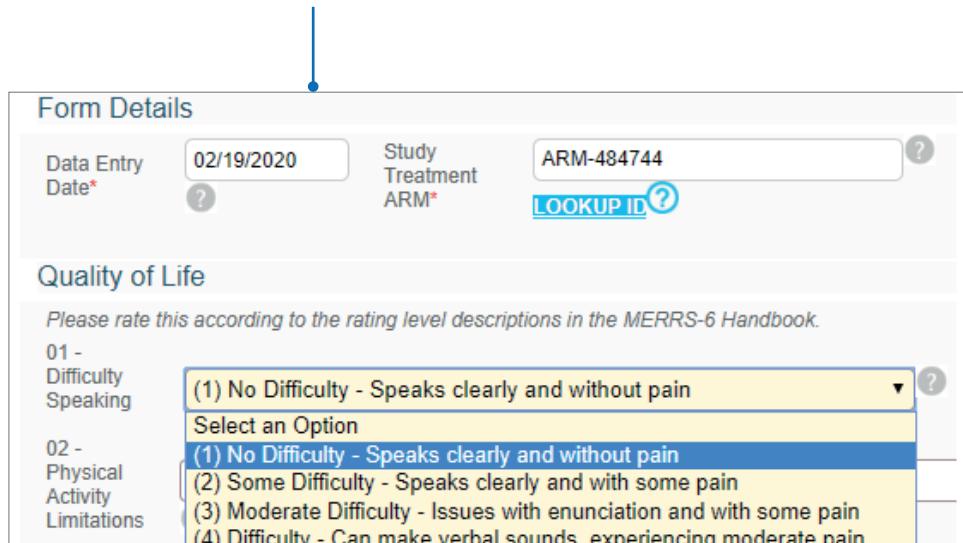
| | Total Queries | Aged Query Status | The Max Age | Study Number | Enrolling Site |
|---|---------------|-------------------|-------------|--------------|----------------|
|   0 | - | - | 0 | 09877 | WCG - VELOS |

Note: Only permissioned users will observe an edit icon. Continue to the next page for additional steps.

Dashboard Tool (continued)

Revise Data

Make virtually any data change necessary to the original form entry from the **Response View** page.



Form Details

| | | | |
|------------------|------------|----------------------|------------|
| Data Entry Date* | 02/19/2020 | Study Treatment ARM* | ARM-484744 |
|------------------|------------|----------------------|------------|

Quality of Life

Please rate this according to the rating level descriptions in the MERRS-6 Handbook.

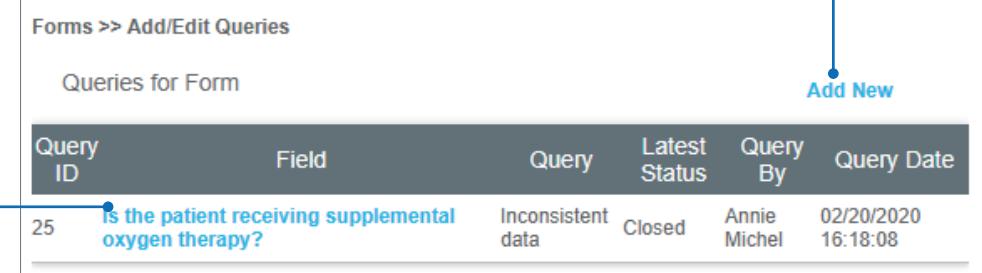
| | |
|------------------------------------|---|
| 01 - Difficulty Speaking | (1) No Difficulty - Speaks clearly and without pain |
| 02 - Physical Activity Limitations | Select an Option (1) No Difficulty - Speaks clearly and without pain (2) Some Difficulty - Speaks clearly and with some pain (3) Moderate Difficulty - Issues with enunciation and with some pain (4) Difficulty - Can make verbal sounds, experiencing moderate pain |

Respond to Queries

Add updates and change the query status by adding a response. Click on the field name link to add a new query response.

Add Queries

Queries allow permissioned users to document questions they have about any form response, adverse event, or patient study status entry. Click the **Add New** link to add a new query.



Forms >> Add/Edit Queries

Queries for Form

Add New

| Query ID | Field | Query | Latest Status | Query By | Query Date |
|----------|---|-------------------|---------------|--------------|---------------------|
| 25 | Is the patient receiving supplemental oxygen therapy? | Inconsistent data | Closed | Annie Michel | 02/20/2020 16:18:08 |