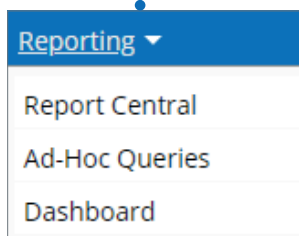


Reporting

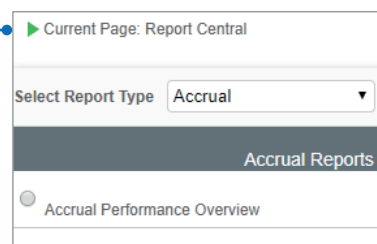
Navigation

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



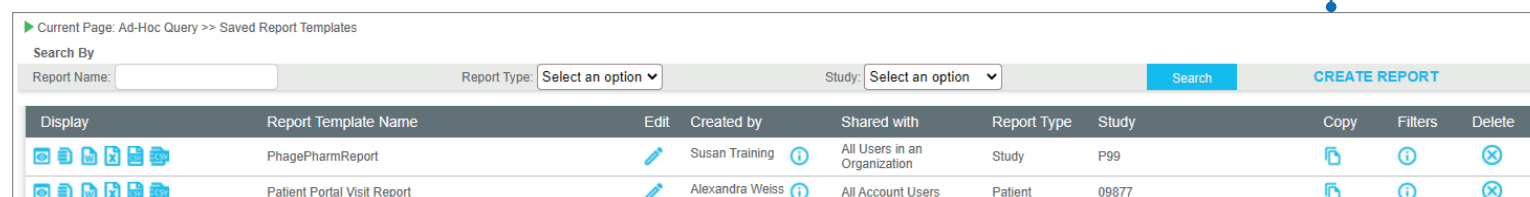
Report Central

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



Ad-Hoc Query Browser

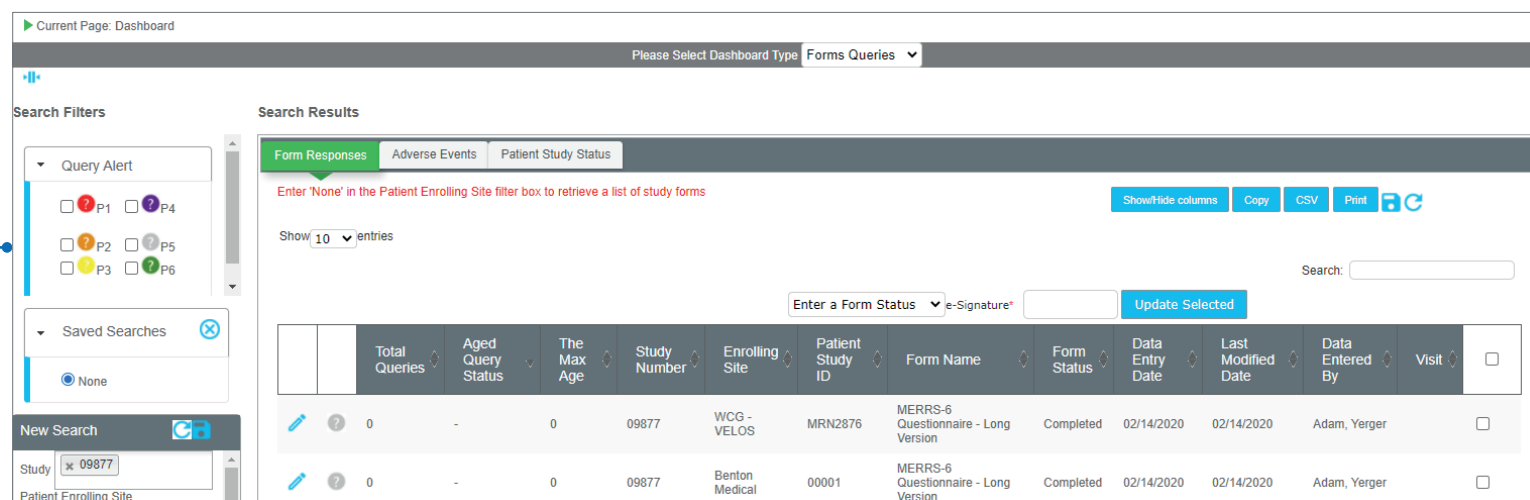
The **Ad-Hoc Query** browser allows users to create and save custom reports based on system datasets, user-created forms, and fields.



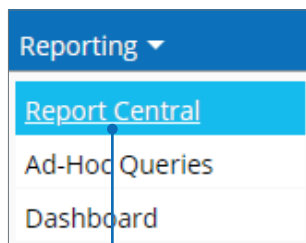
Dashboard Tool

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

- Form Responses
- Adverse Events
- Patient Study Status



Report Central



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

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.*



Current Page: Report Central

Select Report Type: **Accrual** 1

Accrual Reports 2	
<input checked="" type="radio"/> Accrual Performance Overview	?
<input type="radio"/> Accrual by Study Site and Patient Status	?
<input type="radio"/> Accrual by Year	?
<input type="radio"/> Annual Accrual Trend (By Study/Site)	?
<input type="radio"/> Annual Accrual Trend (Study Level/ All Sites)	?
<input type="radio"/> Enrollment by Race / Ethnicity /Gender	?
<input type="radio"/> Studies with No Enrollment	?
NCI Reports	
<input type="radio"/> Data Table 3	?
<input type="radio"/> Data Table 4	?

Available filters for this Report Type are: 3

Date Filter:
☒ All ☐ Year ☐ Month ☐ Date Range

Additional Filters:
 Select Study:
 Select Organization:

☐ Do not display selected filters in Report Header

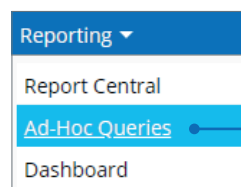
4 5

Display **Download as CSV**

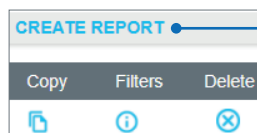
- Select Report Type** – Select a Report Type from the dropdown menu.
- Report List** – Select a report from the available options. Options change depending on the report type selected.
- Filters** – Apply filters to the report as needed.
- Display** – Pull the report by clicking the Display button.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

Ad-Hoc Queries

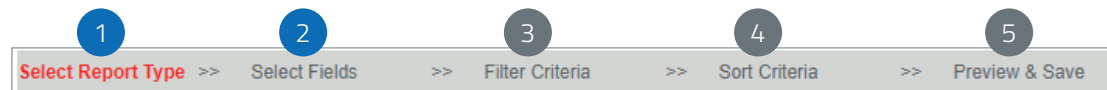
Ad-hoc queries are used to create custom reports from the patient, study, and account domains. Ad-hoc queries are the only means to pull data captured by Account, Study, or Patient forms.



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



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



Current Page: Ad-Hoc Query >> Report Type

Select Report Type >> Select Fields >> Filter Criteria >> Sort Criteria >> Preview & Save

Select Report Type

Report Type: Patient ▼

Select Patient Population

☒ All Patients
☐ Patients on a Study
☐ Specific Patient

Select Study: Select an option ▼
 Select a Patient:

Select Form(s)

Form Name: [Select/Search Form](#)
 Search Forms with fields Where Field ID: Contains ▼

Current Page: Ad-Hoc Query >> Field Selection

Select Report Type >> Select Fields >> Filter Criteria >> Sort Criteria >> Preview & Save [Next](#)

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"/>	<input checked="" type="radio"/> Patient ID	Patient ID	<input type="radio"/> Patient ID	10
<input type="checkbox"/>	<input checked="" type="radio"/> Patient Study ID	Patient Study ID	<input type="radio"/> Patient Study ID	20
<input type="checkbox"/>	<input checked="" type="radio"/> Patient Name	Patient Name	<input type="radio"/> Patient Name	30
<input type="checkbox"/>	<input checked="" type="radio"/> Study Number	Study Number	<input type="radio"/> Study Number	40
<input type="checkbox"/>	<input checked="" type="radio"/> Study Title	Study Title	<input type="radio"/> Study Title	50
<input type="checkbox"/>	<input checked="" type="radio"/> Adverse Event ID	Adverse Event ID	<input type="radio"/> Adverse Event ID	60
<input type="checkbox"/>	<input checked="" type="radio"/> Adverse Event Type	Adverse Event Type	<input type="radio"/> Adverse Event Type	70

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)



3. **Filter Criteria** – Defines the filter criteria that will be used to restrict and define the data that appears in the report.
4. **Sort Criteria** – Determines the sort criteria that will be used to establish the order in which the data is displayed in the report.
5. **Preview & Save** – Finalizes the report by defining the filename, header/footer, and sharing details. Click **Display** to preview the report and then save by entering your e-Signature and clicking **Submit**.

Current Page: Ad-Hoc Query >> Filter Definition

Select Report Type >> Select Fields >> **Filter Criteria** >> Sort Criteria >> Preview & Save **Next**

New Specify Filter Name Add More Rows **Refresh**

Date Filter - Display data entered for:

☒ All ☐ Patient from status date of To

☐ Year ☐ Month ☐ Date Range: From To

Exclude	Start Bracket	Select Field	Criteria	Value	End Bracket	And/Or
<input type="checkbox"/>	<input type="checkbox"/>	Creator	Contains	Laura	<input type="checkbox"/>	And
<input type="checkbox"/>	<input type="checkbox"/>	Select an option	Select an option		<input type="checkbox"/>	And

Current Page: Ad-Hoc Query >> Preview and Save

Select Report Type >> Select Fields >> Filter Criteria >> Sort Criteria >> **Preview & Save** **Display**

Report Header

Report Footer

Save Report As *

Report Description

Shared with

☐ Private

☒ All Account Users

☐ All Users in a Group [Select Group](#) [View List](#)

☐ All Users in study team [Select Study](#) [View List](#)

☐ All Users in an Organization [Select Organization](#) [View List](#)

☒ Center

☐ Left

☐ Right

☒ Center

☐ Left

☐ Right

Note: Field sequence changes are applicable only after saving the report and is not applied to fields in 'Repeating Sections'

Current Page: Ad-Hoc Query >> Sort

Select Report Type >> Select Fields >> Filter Criteria >> **Sort Criteria** >> Preview & Save **Next**

Select a Form or Table to specify Sort Criteria: **Adverse Events**

Select Field	Sort Order
<input type="text"/> Patient ID	<input type="text"/> Ascending

Ad-Hoc Queries *(continued)*

Current Page: Ad-Hoc Query >> Saved Report Templates

Search By

1 Report Name: Report Type: Study: 2 **CREATE REPORT**

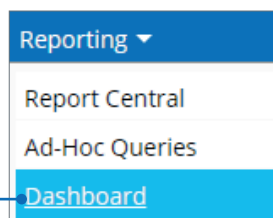
3 Display	Report Template Name	4 Edit	Created by	Shared with	Report Type	Study	5 Copy	6 Filters	7 Delete
	PhagePharmReport		Susan Training	All Users in an Organization	Study	P99			
	Patient Portal Visit Report		Alexandra Weiss	All Account Users	Patient	09877			

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

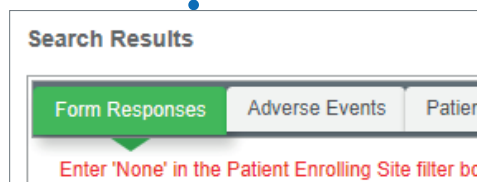
The dashboard tool is used to monitor and manage key data for Form entries, Adverse events, and Patient study statuses.

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



Search Results

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



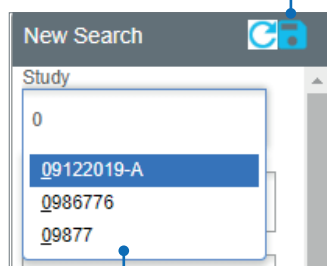
Export Search Results

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.

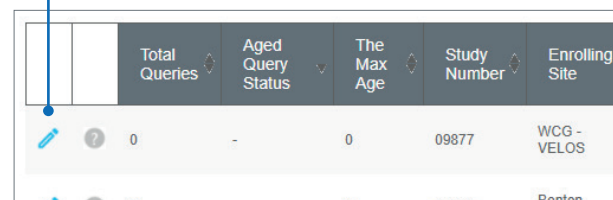


Study Search

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.



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 ?

[LOOKUP ID](#) ?

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

Select an Option

02 - Physical Activity Limitations

(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

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.

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.

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