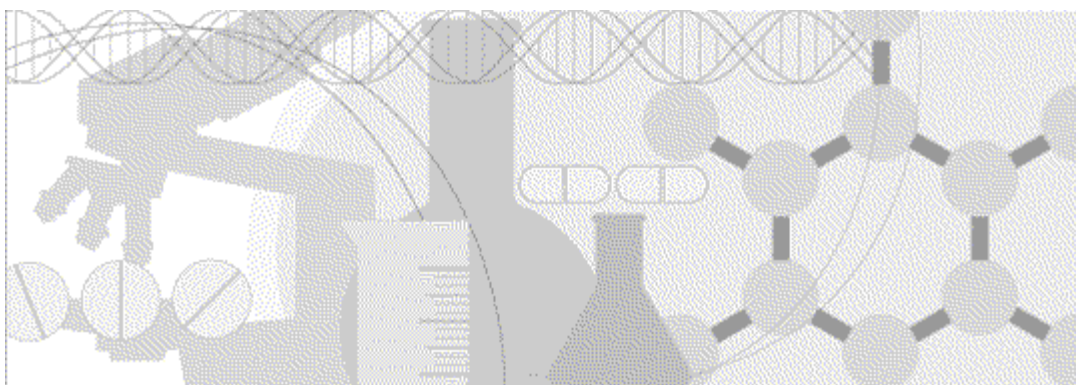


User Guide

Oracle[®] Health Sciences Central Coding
Release 3.1



ORACLE[®]

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PART I: USER TASKS

CHAPTER 1

Getting started

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About the application

Launching the application

Your administrator sets the method of opening the Central Coding application. By default, you open the application by entering the following command in your browser:

- In an environment with native authentication: **http://[server name]/[Coding virtual directory name]**

Note: The Coding virtual directory name is the unique name for the application server where the Central Coding software is installed. This name is defined during installation.

- In a single sign-on environment, the URL is provided by Oracle.

Logging in to the application

- 1 Launch the Central Coding application.

The Login page appears.

- 2 Enter your login name and password.
- 3 Click **Login** or **Sign In** (depending on your environment).

If you are logging in to the application for the first time, you might be prompted to change your password.

- a In the **User Name** field, enter your system login name.
- b In the **New Password** and **Confirm Password** fields, enter your new password.

In environments with native authentication, passwords can be from 1 to 32 characters. For security reasons, Oracle recommends using a combination of letters and numbers and a minimum of 8 characters. Passwords are case-sensitive.

In Oracle SSO environments, passwords must meet the Oracle SSO security requirements.

- c Click **Login**.

The main application screen displays the folders you are allowed to access based on your user profile, role, and collection of rights. The Coding Requests or the Approvals folder is selected by default. Your Display Name appears on all the pages that are part of the main screen.

Note: For environments with native authentication, the Central Coding application is configured to allow a defined number of unsuccessful login attempts. If you exceed this number, you are locked out of the system. See your administrator for resetting your password.

Logging out of the application

- 1 On the main page, click **Logout**.

A confirmation dialog box appears.

- 2 Click **OK**.

If you are working in an Oracle SSO environment and you were also logged in to an SSO-enabled instance of the InForm application, you are logged out of both applications.

Viewing your account profile

- On the main page, click **My Profile**.

The My Profile dialog box appears. For a description of the fields on this page, see *My Profile dialog box* (on page 191).

Changing your password

The way you change your password depends on your Central Coding environment.

Changing your password in an Oracle SSO environment

- 1 On the login page, click **Forgot Password**.
The Forgot Password page appears.
- 2 In the **User Login** field, enter your user name.
- 3 Click **Next**.
The Answer Challenge Questions page appears.
- 4 Enter your responses to the challenge questions.
- 5 Click **Next**.
The Select a new password page appears.
- 6 Enter a new password.
- 7 Click **Save**.

Changing your password in an environment with native authentication

- 1 Log in to the Central Coding application.
- 2 On the main page, click **My Profile**.
The My Profile dialog box appears. For a description of the fields on this page, see *My Profile dialog box* (on page 191).
- 3 Click **Change password**.
The Change Password dialog box appears.
- 4 Complete the following fields:
 - **Old Password**—The login password you are currently using.
 - **New Password / Confirm Password**—The new login password to use.

Passwords can be from 1 to 32 characters. For security reasons, Oracle recommends using a combination of letters and numbers and a minimum of 8 characters. Passwords are case-sensitive

and cannot be reused for a configurable amount of time.

- 5 Click **Save**.

Getting started in an environment migrated to Oracle SSO authentication

If the Central Coding application has been migrated from an environment with native authentication to an Oracle SSO environment, the first time you log in with your new SSO credentials you are prompted to link your existing user account to the SSO environment:

- If you had a Central Coding user account prior to migration, enter your credentials in the **Former User ID** and **Former Password** fields, and click **Link**.

Note: If you forgot your former password, contact an administrator to reset it.

The Central Coding application migrates your role and work team assignments to the Oracle SSO environment.

- If you did not have a user account in Central Coding prior to migration, click **Cancel** to return to the login page and log in as a new user.

If you log in as a new user even though you had a user account prior to migration, your roles and work team assignments are not migrated to the new environment. If this happens, contact an administrator to reset your status, and then log in again and enter the credentials of your former user account to link it to your SSO user account.

Setting the list page size

- 1 On the main page, click **My Profile**.

The My Profile dialog box appears. For a description of the fields on this page, see *My Profile dialog box* (on page 191).

- 2 In the **List page size** box, enter the number of rows to display on a single list view page based on your screen resolution.

You can enter a value from 1 to 100.

- 3 Click **Save**.

Getting help

The Central Coding application includes the following online Help options:

- Central Coding Documentation—Click the Help link (**Help**) in the top right corner of the main page.
- Page-level Help—Click the Help button (🔍) in the top right corner of the page or dialog box.
If the popup blocker in your browser prevents the Page-level Help from opening, turn off the popup blocker or press the Ctrl key before you click the Help button.
- Hover Help—Point to a menu item, action, button, or icon.

Support for character types

The Central Coding application supports the following character types:

- Kanji
- Kana types—Katakana and Hiragana
- Alphanumeric

CHAPTER 2

Coding details

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About coding details

Coding requests are visible to coders on the first page of the Central Coding application based on their work team assignments. A Central Coding approver or administrator can view coding requests by selecting Coding Requests.

Viewing coding requests

- 1 Select **Coding Requests**.
The Coding Requests page appears.
- 2 Filter the list of requests using the available fields.
For a description of the fields on this page, see *Coding Requests page* (on page 173).
- 3 Click **Apply**.

Viewing the details of a coding request

- 1 Select **Coding Requests**.
The Coding Requests page appears.
- 2 Click the **Details** link for a request.
The Request Details page appears. For a description of the fields on this page, see *Request Details page* (on page 230).

Viewing the full coding details for a coded request

- 1 Select **Coding Requests**.
The Coding Requests page appears.
- 2 In the **Show** filter field, select **Done**.
- 3 Click **Apply**.
- 4 Click the **Code** link for a request.
The View Full Coding dialog box appears. For a description of the fields on this page, see *View Full Coding dialog box* (on page 269).

Viewing the synonyms for a code

You view synonyms from the coding browser in Search mode.

- 1 Select **Coding Requests**.
The Coding Requests page appears.
- 2 Click the **Verbatim** link for a request.
The Coding Browser dialog box opens in Search mode. The dictionary elements that appear are configured for the coding definition in use.
- 3 Start the search.

For more information, see *Coding a single item* (on page 17) or *Coding an item and propagating the value* (on page 18).

The **View Synonyms** link appears for each search result entry.

- 4 Click the **View Synonyms** link.

The Synonyms for [Code value] dialog box appears.

Viewing Medicinal Product information

You view Medicinal Product information from the coding browser in Search mode when you are coding using the WHO-DD dictionary, at the Trade Name level.

- 1 Select **Coding Requests**.

The Coding Requests page appears.

- 2 Click the **Verbatim** link for a request.

The Coding Browser dialog box appears in Search mode. The dictionary elements that appear are configured for the coding definition in use.

- 3 Start the search.

For more information, see *Coding a single item* (on page 17) or *Coding an item and propagating the value* (on page 18).

- 4 Click the link in the **Drug Code** or **Trade Name** column.

The View Medicinal Product Information dialog box appears. For a description of the fields on this page, see *View Medicinal Product Information dialog box* (on page 271).

CHAPTER 3

Coding

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About coding

Coding is the process of mapping a standardized term and code from a dictionary level to a verbatim. Users can code adverse events, drugs, diseases, and other items using consistent terminology from industry-standard or custom dictionaries.

Verbatims to be coded originate in coding requests. Each request contains one verbatim.

The Central Coding application assigns coding requests to work teams rather than to individual users for coding.

The application supports the following types of coding:

- Autocoding
- Interactive coding

About autocoding

Autocoding (or automatic coding) uses the predefined set of steps from a coding algorithm together with a dictionary, synonym list, and stopword list to find an unambiguous response to a coding request.

When the Central Coding application receives a coding request from a source application, it first determines if it is able to autocode the verbatim. To perform the autocoding, the application attempts to match the verbatim against:

- Previously interactively coded terms.
- Dictionary terms.
- A defined synonym list.

If no match is found, the application removes punctuation or stopwords from the verbatim, and resumes the matching.

If autocoding succeeds, the Central Coding application stores the coding information in the database and returns the coded data to the source application. If autocoding fails, a coder must interactively code the request.

Reviewing an autocoded request

If an administrator configures autocoded requests to require review, you can review coding requests that have been successfully autocoded and have a **Needs Review** status.

- 1 Select **Coding Requests**.

The Coding Requests page appears. For a description of the fields on this page, see *Coding Requests page* (on page 173).

- 2 Select one or more requests with a status of **Needs Review** (👉).

- 3 Select **Actions > Review Complete**.

The request status changes to **Coded, awaiting approval** (👉) or **Completed, awaiting delivery** (👉).

About interactive coding

Interactive coding (or manual coding) requires you to manually search and select a code value from a dictionary level for a coding request. You use interactive coding to:

- Select a code value when autocoding returns multiple matches or no matches.
- Suggest synonyms for a code value.
- Create a query for a verbatim.
- Change an existing code value.
- Run the autocode algorithm for a verbatim.

Coding browser

The coding browser is an application component used for interactive coding. You can use the coding browser to code events, diseases, drugs, and other items by matching verbatims against the terminology in industry-standard or custom coding dictionaries.

The coding browser appears in a separate dialog box. You must manually close the dialog box to navigate to another page in the application or to perform other tasks.



The information that appears in the coding browser varies with the selected coding method, the type of item being coded, the configured dictionary elements, and the related system configuration for the coding browser.

You can sort the items in underlined column headers in the Results section in ascending and descending order.

For information on dictionary elements, see *About configuring dictionary elements* (on page 88).

Coding modes

You select the code for a verbatim from the coding browser using one of the following modes:

- **Search mode**—Search the selected fields in a dictionary for text that begins with or contains the verbatim text, and review possible codings that contain the results by clicking the Search  icon.
- **Browse mode**—Navigate through the dictionary hierarchy to find an acceptable term and code value for the verbatim by clicking the Browse  icon.

The Search mode is the most efficient way to search for a term. The procedures in this guide use Search mode.

Coding methods

You can use the following methods to code an item in the application:

- **Code single**—Code a single verbatim against the dictionary.

You can code an item that has never been coded, or you can recode an item that has been coded.


- **Code**—Code a single verbatim and propagate the coding to matching verbatims.

The Central Coding application propagates the code value only to requests that:

- Are uncoded.
- Are assigned to the user.
- Have the same verbatim, coding definition, and context information.
- Are associated with unlocked studies. For more information, see *Locking and unlocking a study* (on page 127).

You can code and propagate to items that have never been coded, or you can code and propagate to items that have been coded and have assigned code values. Before coding and propagating to previously coded items, you must clear and propagate the previous code values. For more information, see *Clearing code values* (on page 20).

Coding a single item

Use this procedure to code a single verbatim against a dictionary using Search mode. Alternatively, click the Browse () icon from the coding browser to examine the target coding dictionary from level to level, and select the relevant term.

You access coding requests from the Coding Requests or Approvals page.

- 1 Select a request, and then select **Actions > Code Single**.

The Coding Browser dialog box appears in Search mode. The dictionary elements that appear are configured for the coding definition in use. For a description of the fields on this page, see *Coding Browser dialog box* (on page 166).

- 2 In the **Search for** field, enter the text to code.
- 3 In the **In field** field, select the hierarchy level of the dictionary to search.
- 4 For the application to return more than 200 matched terms, select **Return All Matches**.

If this option is unavailable, contact your administrator.

- 5 Start the search.
 - To run a search for matches for the text entered in the **Search for** field, click the **Starts With** or **Contains** button, or select **Contains whole words**.
 - To run the autocode algorithm for the request, click the **Auto** button.

To ignore the step in the algorithm that searches previous code values that were marked as auto-suggestions, select **Exclude Auto Suggestion step**.

Dictionary entries that match the search criteria appear in the display area.

- 6 To display additional Medicinal Product information for the verbatim when coding using the

WHO-DD dictionary type, select the link in the **Drug Code** or **Trade Name** column.


- 7 Click the **Accept** link for a code value.

If the verbatim was previously coded, the Recode Reason dialog box appears.

- a In the **Reason** field, specify a reason for recoding the verbatim.
- b To indicate the reason should not appear as a note attached to the coding request, deselect **Add as notes**.
- c Click **Accept**.

The application saves the code value for the selected coding request.

Coding an item and propagating the value

Use this procedure to code a single verbatim and propagate the code value to other matching verbatims using Search mode. Alternatively, click the Browse  icon from the coding browser to examine the target coding dictionary from level to level, and select the relevant term.

You access coding requests from the Coding Requests or Approvals page.

- 1 Click the **Verbatim** link for a request.

The Coding Browser dialog box appears in Search mode. The dictionary elements that appear are configured for the coding definition in use. For a description of the fields on this page, see *Coding Browser dialog box* (on page 166).

- 2 In the **Search for** field, enter the text to code.
- 3 In the **In field** field, select the hierarchy level of the dictionary to search.
- 4 For the application to return more than 200 matched terms, select **Return All Matches**.

If this option is unavailable, contact your administrator.

- 5 Start the search.
 - To run a search for matches for the text entered in the **Search for** field, click the **Starts With** or **Contains** button, or select **Contains whole words**.
 - To run the autocode algorithm for the request, click the **Auto** button.

To ignore the step in the algorithm that searches previous code values that were marked as auto-suggestions, select **Exclude Auto Suggestion step**.

Dictionary entries that match the search criteria appear in the display area.

- 6 To prevent the Central Coding application from using the code value you accept for new requests with the same verbatim, dictionary, coding definition, and context information, deselect **Use as Auto Suggestion**.
- 7 To display additional Medicinal Product information for the verbatim when coding using the WHO-DD dictionary type, select the link in the **Drug Code** or **Trade Name** column.
- 8 Click the **Accept** link for a code value.

If the verbatim was previously coded, the Recode Reason dialog box appears.

- a In the **Reason** field, specify a reason for recoding the verbatim.
- b To indicate the reason should not appear as a note attached to the coding request, deselect

Add as notes.

- c Click **Accept**.

The application propagates the selected code value to other uncoded requests with the same verbatim, coding definition, and context information.

Suggesting a synonym

You suggest synonyms from the coding browser in Search mode.

- 1 Select **Coding Requests**.

The Coding Requests page appears.

- 2 Click the **Verbatim** link for a request.

The Coding Browser dialog box appears in Search mode. The dictionary elements that appear are configured for the coding definition in use.

- 3 Code the item.

For more information, see *Coding a single item* (on page 17) or *Coding an item and propagating the value* (on page 18).

The **View Synonyms** link appears for each search result entry.

- 4 Click the **Suggest Synonyms** link.

The **Suggest Synonym** dialog box appears.

- 5 In the **Suggested Synonym** field, enter the synonym to propose for the term.

- 6 Click **Accept**.

The proposed synonym is added to the synonym list that is associated with the coding definition for the coding request. After a dictionary manager or an administrator approves it, the synonym is available.

Clearing code values

Use this procedure to remove the code value for:

- A verbatim.
- Other delivered or undelivered coded requests with the same verbatim, code value, coding definition, and context information.

The code value is cleared only for coded requests that are:

- Associated with unlocked studies. For more information, see *Locking and unlocking a study* (on page 127).
- Accessible to the user.

After code values are cleared in the Central Coding application, the source application clears the same values in return. If the source application is InForm, the Central Coding application also clears approval details such as the approver name and approval date.

You access coding requests from the Coding Requests or Approvals page.

- 1 Select one or more requests.
- 2 Select **Actions** > **Clear Code** to clear the code value for a single request.

or

Select **Actions** > **Clear and Propagate** to clear the code value for multiple requests.

The Clear Code Reason dialog box appears.

- 3 In the **Reason** field, specify a reason for clearing the code value, or for propagating the clearing of the code value to similar coded requests.
- 4 To indicate the reason should not appear in a note attached to the coding request, deselect **Add as notes**.
- 5 Click **Accept**.

The coding status of the requests changes to **Uncoded** (●).

CHAPTER 4

Queries

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About queries

A query indicates that more information is required to code a request. You create queries on verbatims from the Coding Requests page, the Approvals page, or the coding browser. For more information, see *Creating a query from the Coding Requests or Approvals page* (on page 22) or *Creating a query from the coding browser* (on page 23).

Queries created in the Central Coding application can be closed in the Central Coding application in the following ways:

- If the auto close functionality is enabled, the query is closed automatically when the verbatim is successfully coded and approved.

For more information about the auto close feature, see *Setting system configuration options for auto queries* (on page 142).

- If the query is in **Answered** state and the verbatim can be coded, a Central Coding user closes the query.
- A Central Coding user with the Force Close Query right marks it as **Closed**.

Note: This is not the preferred way to close queries. Oracle recommends queries to be closed as a result of being coded.

Queries and query statuses appear in both the Central Coding and the InForm applications, and both Central Coding and InForm users can view and modify them. For more information about how the Central Coding system exchanges query data with the InForm system, see *About queries in InForm* (on page 138).

Viewing queries and their status

- 1 Select **Queries**.
The Queries page appears.
- 2 Filter the list of queries using the available fields.
For a description of the fields on this page, see *Queries page* (on page 216).
- 3 Click **Apply**.

Viewing the audit history for a query

- Click the status icon for a query.
The Query History page appears. For more information, see *Query History page* (on page 218).


Creating a query from the Coding Requests or Approvals page

- 1 Select a verbatim.
- 2 Select **Actions > Create query single** to create a query on a single verbatim.

or

Click the **Create Query** button to create a query and propagate it to multiple instances of the verbatim.


The Create Query dialog box appears. For a description of the fields on this page, see *Create Query dialog box* (on page 177).

- 3 Select a reason from the **Reason** drop-down list or click **Other** and specify the reason for creating the query in the Other text box.
 - To copy the reason from the **Reason** drop-down list, click the **Copy** () icon.
 - To add the reason to the standard list that appears in the **Reason** drop-down list, if you have the Manage Standard Reasons right, click **Add as standard reason**.
- 4 If you have the Force Close Query right, deselect **Auto Close Query upon Coding Complete**. If you deselect this option, the Central Coding application does not close the query if the verbatim is successfully coded. You must use the **Force Close Query** option to close the query.
Oracle recommends leaving this option selected.
- 5 To indicate that the Central Coding application does not associate the query with each new instance of the verbatim, if you have the required rights, deselect **Add to auto query list**.
- 6 Click **OK**.

The Central Coding application creates the query on the selected verbatim, and also on other instances of the selected verbatim, if applicable.

Creating a query from the coding browser

You access coding requests from the Coding Requests or Approvals page.

- 1 Click the **Verbatim** link for a request.
The Coding Browser dialog box appears in Search mode. The dictionary elements that appear are configured for the coding definition in use.
- 2 Click the **Create Query** link.
The Create Query dialog box appears. For a description of the fields on this page, see *Create Query dialog box* (on page 177).
- 3 Select a reason from the **Reason** drop-down list or click **Other** and specify the reason for creating the query in the Other text box.
 - To copy the reason from the **Reason** drop-down list, click the **Copy** () icon.
 - To add the reason to the standard list that appears in the **Reason** drop-down list, if you have the Manage Standard Reasons right, click **Add as standard reason**.
- 4 If you have the Force Close Query right, deselect **Auto Close Query upon Coding Complete**. If you deselect this option, the Central Coding application does not close the query if the verbatim is successfully coded. You must use the **Force Close Query** option to close the query.
Oracle recommends leaving this option selected.
- 5 To indicate that the Central Coding application does not associate the query with each new instance of the verbatim, if you have the required rights, deselect **Add to auto query list**.
- 6 Click **OK**.

The Central Coding application creates the query on the selected verbatim.

Reissuing a query


Use this procedure to reissue a query that received an unsatisfactory answer from a source application user. You can reissue a query multiple times, but only one query at a time.

- 1 Select **Queries**.

The Queries page appears.

- 2 Select a query with **Answered** status.
- 3 Click the **Reissue Query** button.

The Reissue Query dialog box appears. For a description of the fields on this page, see *Reissue Query dialog box* (on page 227).

- 4 Select a reason from the **Reason** drop-down list or click **Other** and specify the reason for creating the query in the Other text box.
 - To copy the reason from the **Reason** drop-down list, click the **Copy**  icon.
 - To add the reason to the standard list that appears in the **Reason** drop-down list, if you have the Manage Standard Reasons right, click **Add as standard reason**.
- 5 Click **OK**.

The status of the query changes to **Open** or **Candidate**.

Retrying a query delivery

Use this procedure to send an undeliverable query back to the source application. You can run Retry Query Delivery on multiple requests at a time.

Note: The Central Coding application retries delivery for queries with **Open Failed**, **Reissue Failed**, or **Close Failed** status when it runs the next Get Requests job.

- 1 Select **Queries**.

The Queries page appears.

- 2 Select a query or multiple queries with **Failed** status.
- 3 Select **Actions > Retry Query Delivery**.

The query returns to normal status.

CHAPTER 5

Notes and flags

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About notes

You can create a note for a coding request from the Coding Requests page or the Approvals page. Each note is permanently attached to the associated coding request. The Central Coding application stores both questions from approvers and responses from coders as entries in the note history.

You cannot modify note text or delete a note, and you cannot disable the Note functionality. The Central Coding application attempts to attach the reason for each of the following actions as a note to the impacted request:

- Recode a verbatim.
- Clear a code value.
- Clear and propagate a code value.
- Disapprove a request.



Adding a note to a request

You access coding requests from the Coding Requests or Approvals page.

- 1 Select a coding request.
- 2 Click the **Add Notes** button.
The Add Notes dialog box appears.
- 3 In the **Notes** text box, enter the note text for the request.
- 4 Click **Accept**.

Viewing note details for a request

You access coding requests from the Coding Requests or Approvals page.

- To view note text, point to the Note () icon.
Hover Help appears, listing the text for each entry in the note.
The note entries are sorted from newest to oldest.
- To view note history, click the Note () icon.
The Notes History page appears.

About flags

You can attach a flag to a coding request from the Coding Requests page or the Approvals page to indicate that the request requires attention. You can assign as many as four flags to the same verbatim.

The Central Coding application provides a set of flags, identified by color. A Central Coding administrator can configure the meaning of each flag or disable the Flags functionality. Central Coding does not store flag history in the audit trail for the associated coding request.

Adding a flag to a request

You access coding requests from the Coding Requests or Approvals page.

- 1 Select a request.
- 2 Click the **Add Flags** button.
The Please select flags to add dialog box appears.
- 3 Select the checkbox for a flag.
- 4 Click **Accept**.

Removing a flag from a request

You access coding requests from the Coding Requests or Approvals page.

- 1 Click the flag icon to delete.
A confirmation dialog box appears.
- 2 Click **OK**.

CHAPTER 6

Approval

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About approval

The approval functionality is available only if configured for your system. An administrator can configure the Central Coding application to apply approvals to coded requests automatically, or to require manual approvals.

Approvers can view the requests that are awaiting approval and their details, manually approve or disapprove requests, or indicate that more information is required to code requests. Whether you can perform all or some of these tasks depends on your roles and rights.

Approved requests are considered to be complete and available for delivery to the source application. If the source application is InForm, the Central Coding application can return approval details such as the approver name and approval date to InForm.

Viewing the requests to approve

- 1 Select **Approvals**.

The Approvals page appears. For a description of the fields on this page, see *Approvals page* (on page 154).

- 2 Filter the list of requests using the available fields.
- 3 Click **Apply**.

The application displays the filtered list of items to approve.

Viewing the details of a coding request awaiting approval

- 1 Select **Approvals**.

The Approvals page appears.

- 2 In the **Show** filter field, select **To Do**.
- 3 Click **Apply**.
- 4 Click the **Details** link for a request.

The Request Details page appears. For a description of the fields on this page, see *Request Details page* (on page 230).

Approving requests

Use this procedure to approve the coding for the selected request and for other coded requests with the same code, verbatim, coding definition, and context information. The approval propagates only to requests associated with unlocked studies. For more information, see *Locking and unlocking a study* (on page 127).

Approved requests are considered to be complete and available for delivery to the source application.

- 1 Select **Approvals**.


The Approvals page appears.

- 2 In the **Show** filter field, select **To Do**.

- 3 Click **Apply**.
- 4 Select one or more requests.
- 5 Click the **Approve Single** button to approve a single request.

or

Click the **Approve** button to approve multiple requests.

The coding status of the requests changes to **Completed, awaiting delivery** ()

Disapproving requests

Use this procedure to disapprove the coding for the selected request and for all other coded requests with the same code, verbatim, coding definition, and context information. The disapproval propagates only to requests associated with unlocked studies. For more information, see ***Locking and unlocking a study*** (on page 127). Disapproved requests are returned to the coder's queue, and the disapproval reason appears in a note attached to the coding request.

- 1 Select **Approvals**.

The Approvals page appears.

- 2 In the **Show** filter field, select **To Do**.

- 3 Click **Apply**.

- 4 Select one or more requests.

- 5 Click the **Disapprove Single** button to disapprove a single request.

or

Click the **Disapprove** button to disapprove multiple requests.

The Disapprove Reason dialog box appears.

- 6 In the **Reason** field, specify a reason for disapproval.
- 7 To prevent the Central Coding application from attaching the reason for disapproval in a note to the coding requests, deselect **Add as notes**.
- 8 Click **Accept**.

The coding status of the requests changes to **Recode** ()

CHAPTER 7

Reports and data exports

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About reports

To view and monitor coding data, Central Coding users with a Reporter role can create administrative reports.

Users can produce the following standard types of reports:

- **Coded Items Report**—A list of coded items in one or all studies from one or all study groups in a specified date range, based on their approval status.
- **Coding Consistency Report**—A list of codings for a dictionary type, study, verbatim, and coding mode in a specified date range.
- **Workteams, Roles, and Rights by User**—A list of work teams, roles, and rights assigned to an **Active** user.

The Central Coding application generates reports in Rich Text Format (RTF) and saves them to the database.

Producing a report

Because Coded Items and Coding Consistency report types contain a large amount of data, Oracle recommends that you run each of these report types for a single study and use a short date range.

- 1 Select **Reports**.

The Report Requests page appears.

- 2 Click the **New** button.

The Produce Report dialog box appears.

- 3 In the **Report Type** field, select the report to run.

For the **Coded Items Report** and **Coding Consistency Report**, the page refreshes and additional fields appear.

- 4 Enter data in the available fields based on the descriptions in *Produce Report/View Report Request dialog box* (on page 208).

For the **Coded Items Report** and **Coding Consistency Report**, you can select the group of studies to generate the report on from the **Study Group** drop-down list.

- 5 Click **Accept**.

Viewing the list of report requests

- Select **Reports**.

The Report Requests page appears. For a description of the fields on this page, see *Report Requests page* (on page 228).

Deleting a report request

- 1 Select **Reports**.
The Report Requests page appears.
- 2 Select a report request.
- 3 Select **Actions > Remove**.

Viewing the parameters for a report

- 1 Select **Reports**.
The Report Requests page appears.
- 2 Click the **Report Name** link.
The View Report Request page appears.
For Coded Items Report and Coding Consistency Report, additional fields appear. For more information, see:
 - Coded Items Report - *View Report Request dialog box—Coded Items Report* (on page 208).
 - Coding Consistency Report - *View Report Request—Coding Consistency Report* (on page 208).
- 3 Click **OK**.

Viewing the results of a report

Because report data is read-only, multiple users can view a report at the same time.

You can open reports in Microsoft Word or WordPad.

- 1 Select **Reports**.
The Report Requests page appears.
- 2 Select a report.
- 3 Click the **View Results** button.
The Document Viewer page appears with the Windows File Download dialog box.

About data exports

Users with the Reporter role can export data to an external application such as Microsoft Excel spreadsheet software in the form of a Comma-Separated Value (CSV) file. The export is not saved in the Central Coding application as a report.

Data exports can be of the following type:

- **AutoCode Export**—Information on the percentage of autocoded items for one or multiple studies in a specified date range. You can filter the report by date, coding definition, or study.
- **Auto Suggestion List Export**—Information about the auto-suggestion list for a coding definition. You can filter the report by coding definition.
- **Coded Items Export**—Information on the coded items in one or all studies from one or all study groups in a specified date range.
- **Coder Metrics Export**—Information on the coding work that a coder has done in a specified time frame.
- **Coding Consistency Export**—Information on the codings for a dictionary type, study, verbatim, and coding mode in a specified date range. You can also choose to export information only on verbatims with inconsistent codes.
- **Query Export**—Information on the queries for a study based on query status.
- **Study Metrics Export**—Information on the coding work in a study during a specified time frame.
- **Synonym List Export**—Information on a synonym list.
- **Uncoded Items Export**—Information on the uncoded items for one or multiple studies in a specified date range. You can filter the report by study, date, or status.

Exporting data to a report file

- 1 Select **Reports**.
The Report Requests page appears.
- 2 Click the **Export** button.
The Produce Report dialog box appears.
- 3 In the **Export Type** field, select an export.
If the export type requires parameters, additional fields appear.
- 4 Enter data in the additional fields.
For more information, see *Produce Report/View Report Request dialog box* (on page 208).
- 5 Click **Accept**.
The Document Viewer page appears with the Windows File Download dialog box.
- 6 To save the file, click **Save**.

The report file is saved in RTF format.

or

To display the report file in a separate window in Microsoft Word or WordPad, click **Open**.

PART II: ADMIN TASKS

CHAPTER 8

Users, roles, rights, and work teams

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About users

A user is a person who works in the Central Coding application through the user interface.

The type of authentication scheme used with the Central Coding instance determines how you perform user management and authorization:

- **Native authentication**—Used in all self-hosted Central Coding instances. User management is performed in the application by the Central Coding administrator. Users log in to the Central Coding application directly using the credentials provided by their administrator.
- **SSO authentication**—Available only for Central Coding instances hosted by Oracle. User management is performed by your organization’s delegated administrator through the OIM self-service console. Users log in with their Oracle SSO credentials. If the Central Coding application is integrated with instances of the InForm application that are SSO-enabled, users log in to one application to access both.

User account types

Users are assigned one of the following account types:

- **User**—An account that is associated with a person. This type of account is the system default.
- **SuperUser**—An account that is associated with a person and that never locks out after the configured number of failed login attempts.
- **Machine**—An account that is not associated with a person, such as the account used by the job scheduler. Passwords for these accounts never expire. Machine users cannot login through the user interface.

User account statuses

Each user account has a status, as described in the following table.

User account statuses	
Hover text	Description
Active (■)	The user is in the system and can access the application. New accounts must be activated before they can be used.
Active Never Used (■)	The user profile is active, but it has not been used.
Inactive (●)	The user is in the system but cannot access the application. Inactive accounts can be activated.
Inactive Never Used (●)	The user profile exists, but it has not been activated or used.
Invalid (●)	The user profile is being entered and is not yet saved. This status appears only during the creation of a new user profile. Only for environments with native authentication.
Terminated (●)	The user can no longer access the application. Terminated accounts cannot be activated. Only for environments with native authentication.
Locked	The user account is locked. Any login attempt fails.

In environments upgraded from Central Coding releases prior to 3.1 and migrated to Oracle SSO authentication, the letter U appears on the status icon of users that have not migrated yet to the SSO environment. For more information, see *Migrating users to an Oracle SSO environment* (on page 46).

Accounts for new users have the following status, depending on the type of Central Coding environment:

- **Environments with native authentication**—Inactive Never Used.
- **Oracle SSO environments**—Active Never Used (for new Central Coding 3.1 environments) or Inactive Never Used (for environments upgraded from Central Coding releases prior to 3.1 and migrated to SSO authentication).

User management in an environment with native authentication

Based on data input during installation, the Central Coding application creates an initial user and a password. This user can then log into the Central Coding application and add new users.

New users have a status of **Inactive Never Used**. Therefore, you can define the access privileges for users before allowing them access to the system. Before a new user can access the application, you must:

- Add the user to the system.
- Assign at least one role to the user.
- Assign the user to at least one work team (coders and approvers only).
- Activate the user.

For security, a Central Coding administrator can define three types of users on the [User Name] page. The Central Coding application authenticates each type as follows:

User type	Authentication type
Native	User ID and password must match encrypted data from the Central Coding database.
Windows	User must be part of a Windows domain. Password must be validated by a Windows API.
Certificate	Password must be validated against a digital certificate.

Adding a user

Every user has a unique identifier. After you create a user, you cannot delete it from the application.

To add a user:

- 1 Select **Admin > Management > Users**.
The Users page appears.
- 2 Click the **New** button.
The New User page appears.
- 3 Enter data in the fields using the descriptions in *[New User] page* (on page 204).
- 4 Click **Save**.

Changing a user password

- 1 Select **Admin > Management > Users**.
The Users page appears.
- 2 Click the **Name** link for a user.
The [User Name] page appears.
- 3 In the **Password** and **Verify password** fields, enter the new password for the user.


Note: Passwords can be from 1 to 32 characters. For security reasons, Oracle recommends using a combination of letters and numbers and a minimum of 6 characters. Passwords are case-sensitive.

- 4 To require the user to change this new password at the next login, select **User must change password**.
- 5 Click **Save**.

Viewing or editing the details for a user


- 1 Select **Admin > Management > Users**.
The Users page appears.
- 2 Click the **Name** link for a user.
The [User Name] page appears.
- 3 View or edit data in the fields using the descriptions in *[User Name] page* (on page 204).
- 4 Click **Save**.

Activating a user

- 1 Select **Admin > Management > Users**.
The Users page appears.
- 2 Select a user.
- 3 Select **Actions > Activate**.
The status changes to **Active** (.

Deactivating a user

Inactive users exist in the system but cannot access the application. If a user is logged in when you deactivate the account, the user can no longer perform any actions in the Central Coding application. You can activate an inactive account.

- 1 Select **Admin > Management > Users**.
The Users page appears.
- 2 Select a user.
- 3 Select **Actions > Deactivate**.
The status changes to **Inactive** (.

Note: You cannot deactivate the last SuperUser account.


Terminating a user

Terminated users can no longer access the application. You cannot activate a terminated account.

- 1 Select **Admin > Management > Users**.

The Users page appears.

- 2 Select a user.
- 3 Select **Actions > Terminate**.

The status changes to **Terminated** ()

User management in an Oracle SSO environment

The initial Central Coding administrator account created during the installation must be associated with the Central Coding instance in the OIM self-service console. This user is assigned the User Administrator and User Manager roles.

The following user management tasks are performed by a delegated administrator in the OIM self-service console:

- Adding a user.
- Activating a user.
- Deactivating a user.
- Terminating a user.
- Editing the personal information of a user.
- Changing a user password.

Migrating users to an Oracle SSO environment

If the Central Coding application has been updated to release 3.1 and migrated to an Oracle SSO environment, the application can migrate existing user accounts to the SSO environment. Role and work team assignments are transferred to the new environment as part of the migration.

An existing user account is migrated if the following conditions are met:

- On the System Configuration page, the option **Allow User Migration** is selected. After a period of time when users can migrate their existing account to the SSO environment, you can deselect the option. The letter U appears on the status icon of users that have not migrated to the SSO environment.
- A delegated administrator has created the SSO user in the OIM self-service console.
- You do not assign any role to the SSO user before the account is migrated.

If you assign one or more roles to the user before the user account is migrated, previous role and work team assignments cannot be migrated to the SSO environment. If this happens, you must unmigrate the user:

- 1 Make sure the user is not logged in.
- 2 Select **Admin > Management > Users**.

The Users page appears.

- 3 Select the user.
- 4 Select **Actions > Unmigrate**.

The user status is reset and the account can be migrated.

- When logging in for the first time after Central Coding is migrated to the SSO environment, the user links the existing account to the account in the SSO environment. For more information, see *Getting started in an environment migrated to Oracle SSO* (on page 6).

Viewing the list of users

- Select **Admin > Management > Users**.

The Users page appears. For a description of the fields on this page, see *Users page* (on page 268).

Assigning and editing the roles for a user

You can assign one or more roles to a user. By default, all users are assigned the Basic Application User role. Oracle recommends that you do not assign any other roles to users with User Administrator or User Manager roles.

- 1 Select **Admin > Management > Users**.

The Users page appears.

- 2 Click the **Name** link for a user.

The [User Name] page appears.

- 3 Click the **Assign Roles** button.

The Assign Roles to User: [User Name] dialog box appears.

- 4 Click a button under **Action** to add or to remove the role from the Selected Roles section.

- 5 Click **Save**.

Assigning and editing the work teams for a user

Coders and approvers see only the coding requests that are assigned to the work teams to which they belong. Depending on their responsibilities, system administrators might not need to belong to any work teams.

- 1 Select **Admin > Management > Users**.

The Users page appears.

- 2 Click the **Name** link for a user.

The [User Name] page appears.

- 3 Click the **Assign Work Teams** button.

The Assign Work Team to User: [User Name] dialog box appears.

- 4 Click a button under **Action** to add or to remove the work team from the Selected Work Teams section.

- 5 Click **Save**.

About roles and rights

A right represents a privilege to access a feature in the application. Rights are defined by the application and control the pages that appear in the user interface and the actions available on each page. You cannot create new rights.

A role is a collection of rights that control access to the application. Roles describe the function that a user has in the application.

Roles and rights management

The Central Coding application contains the following default roles organized by job function.

- **Approver**—An end user with rights to examine coded requests and to approve or disapprove the code, or mark a request as needing further action. The Central Coding application can be configured to apply approvals to coded requests automatically or to require manual approval.
- **Coder**—An end user with rights to perform coding tasks. Coders can manage the autocoding process or interactively code requests using the coding browser.
- **Dictionary manager**—A user with rights to perform dictionary tasks required for ongoing administration of the Central Coding application, such as managing synonym lists, stopword lists, coding algorithms, coding definitions, assignment rules, and coding dictionaries.
- **Reporter**—A user with rights to produce administrative reports for viewing and tracking purposes, and to export reports to an external application.
- **System Administrator**—A user with rights to perform tasks required for the initial setup and ongoing administration of the Central Coding application, such as managing users, configuring synonym lists, stopword lists, coding algorithms, coding definitions, and assignment rules; managing system configuration, adapters, study information, and job schedules; using impact analysis; and managing coding dictionaries.

System administration roles can be generalized, with many tasks being performed by a single administrator, or they can be specialized, with various users performing specific types of administrative tasks.

- **User Manager and User Administrator**—Users who perform user management tasks, such as adding, activating, and maintaining users; and managing roles, rights, and work teams.

Additionally, the following system roles exist in the Central Coding user interface:

- **Basic Application User**—A role that is assigned to all users. This role cannot be edited or deleted.
- **Coding Interface Full Access**—A role that is used to authenticate a user in the coding web service interface.
- **Oracle Data Entry Team**—In an Oracle SSO environment, an Oracle Support representative with rights to create user administrators and user managers.
- **Oracle Services Consultant**—In an Oracle SSO environment, an Oracle Services representative with rights to manage dictionaries, perform coding setup, and run impact analysis.

The following users perform tasks outside of the Central Coding user interface:

- **Production user**—A user who has access to the Central Coding application server and performs

tasks such as troubleshooting; modifying system settings; loading, configuring, and deleting coding dictionaries; adding adapters and studies using the command line; and updating data using the Data Installer utility.

- **OIM self-service console delegated administrator**—In an Oracle SSO environment, a user who performs user management tasks in the OIM self-service console.

Each role has an associated set of rights. Rights control the pages that appear to users and the availability of actions. A Central Coding administrator can create non-default roles, delete non-default roles, or specify the rights assigned to them. Changes to a role take effect on the users assigned to it immediately after the changes are saved.

A user can have one or multiple roles. For a complete list of default roles and their associated rights, see *Default roles and rights* (on page 275).

Viewing the list of roles

- Select **Admin > Management > Roles**.

The Roles page appears. For a description of the fields on this page, see *Roles page* (on page 236).

Adding a role and assigning its rights

- 1 Select **Admin > Management > Roles**.

The Roles page appears.

- 2 Click the **New** button.

The New Role page appears.

- 3 Enter data in the fields using the descriptions in *New Role/Role Details page* (on page 196).

- 4 Click **Save**.

- 5 Click the **Assign Rights** button.

The Assign Rights to Roles: [Role Name] dialog box appears. For a description of the fields on this page, see *Assign Rights to Role: [Role Name] dialog box* (on page 158). For a complete list of the default roles and their rights, see *Default roles and rights* (on page 275).

- 6 Select or clear the checkboxes.

- 7 Click **Save**.

Note: Only Oracle representatives can be assigned the Oracle Data Entry Team and Oracle Services Consultant roles. Oracle recommends that you do not assign users with these roles any other User Administrator or User Manager role.

Viewing or editing the details of a role

You cannot modify or delete the **Basic Application User**. In an Oracle SSO environment, you cannot modify or delete the **Oracle Data Entry Team** and **Oracle Services Consultant** roles.

- 1 Select **Admin > Management > Roles**.

The Roles page appears.

- 2 Select a role.
- 3 Click the **View Details** button.

The Role Details page appears.

- 4 View or edit data in the fields using the descriptions in *New Role/Role Details page* (on page 196).
- 5 Click **Save**.

Assigning and editing the rights to a role

You cannot modify or delete the **Basic Application User**. In an Oracle SSO environment, you cannot modify or delete the **Oracle Data Entry Team** and **Oracle Services Consultant** roles.

- 1 Select **Admin > Management > Roles**.

The Roles page appears.

- 2 Select a role.
- 3 Click the **View Details** button.

The Role Details page appears.

- 4 Click the **Assign Rights** button.

The Assign Rights to Roles: [Role Name] dialog box appears. For a description of the fields on this page, see *Assign Rights to Role: [Role Name] dialog box* (on page 158). For a complete list of the default roles and their rights, see *Default roles and rights* (on page 275).

- 5 Select or clear the checkboxes.
- 6 Click **Save**.

Deleting a role

When you delete a role assigned to a user, the assignment is also deleted.

You cannot modify or delete the **Basic Application User**. In an Oracle SSO environment, you cannot modify or delete the **Oracle Data Entry Team** and **Oracle Services Consultant** roles.

- 1 Select **Admin > Management > Roles**.

The Roles page appears.

- 2 Select a role.
- 3 Select **Actions > Delete**.

A confirmation dialog box appears.

- 4 Click **OK**.

About work teams

A work team is a set of users grouped by function for the purpose of performing tasks in the application. The system administrator defines the criteria for organizing the users based on the business needs of the organization.

Work teams filter the list of coding requests. Coders and approvers see only those requests that are assigned to the work teams to which they belong.

Users with the Administrator role manage work teams and work team assignment rules.

There are no default work teams.

Viewing the list of work teams

- Select **Admin > Management > Work Teams**.

The Work Teams page appears. For a description of the fields on this page, see *Work Teams page* (on page 273).

Adding a work team and assigning its users

- 1 Select **Admin > Management > Work Teams**.

The Work Teams page appears.

- 2 Click the **New** button.

The New Work Team page appears.

- 3 Enter data in the fields using the descriptions in *[New Work Team] page* (on page 206).

- 4 Click **Save**.

- 5 Click the **Assign Users** button.

The Assign Users to Work Team: [Work Team Name] dialog box appears. For a description of the fields on this page, see *Assign Users to Work Team: [Work Team Name] dialog box* (on page 159).

- 6 Click a button under **Action** to add or to remove the users from the Selected Users section.

- 7 Click **Save**.

Viewing or editing the details for a work team

- 1 Select **Admin > Management > Work Teams**.

The Work Teams page appears.

- 2 Select a work team.

- 3 Click the **View Details** button.

The Work Team Details page appears.

- 4 View or edit data in the fields using the descriptions in *Work Team Details page* (on page 206).

- 5 Click **Save**.

Adding or removing the users in a work team

- 1 Select **Admin > Management > Work Teams**.

The Work Teams page appears.

- 2 Select a work team.

- 3 Click the **View Details** button.

The Work Team Details page appears.

- 4 Click the **Assign Users** button.

The Assign Users to Work Team: [Work Team Name] dialog box appears. For a description of the fields on this page, see *Assign Users to Work Team: [Work Team Name] dialog box* (on page 159).

- 5 Click a button under **Action** to add or to remove the users from the Selected Users section.
- 6 Click **Save**.

Deleting a work team

- 1 Select **Admin > Management > Work Teams**.

The Work Teams page appears.

- 2 Select a work team.

- 3 Select **Actions > Delete**.

A confirmation dialog box appears.

- 4 Click **OK**.

Note: You cannot delete a work team that has assigned requests.

CHAPTER 9

System information and configuration

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About system configuration

You can use the options on the System Configuration page to view and edit:

- User migration options for environments migrated to SSO authentication
- Authentication parameters for environments with native authentication
- Application settings
- Impact analysis features
- Query management settings
- Job settings

For information on configuring the options for impact analysis, see *Configuring impact analysis system configuration settings* (on page 105).

For information on configuring the system for queries, see *Setting system configuration options for queries* (on page 139).

Setting authentication parameters in environments with native authentication

- 1 Select **Admin > System > System Configuration**.

The System Configuration page appears. For a description of the fields on this page, see *System Configuration page* (on page 255).

- 2 Click the **Edit** button.
- 3 Edit the information in the Authentication Options section.
- 4 Click the **Save** button.

Configuring application settings

- 1 Select **Admin > System > System Configuration**.

The System Configuration page appears.

- 2 Click the **Edit** button.
- 3 Edit the information in the Application Options section. For a description of the fields on this page, see *System Configuration page* (on page 255).

Note: Some application options are available only if Central Coding is running in an environment with native authentication.

- 4 Click the **Save** button.

Configuring job settings

- 1 Select **Admin > System > System Configuration**.

The System Configuration page appears. For a description of the fields on this page, see *System Configuration page* (on page 255).

- 2 Click the **Edit** button.
- 3 Edit the information in the Get/Put Job Options section.
- 4 Click the **Save** button.

Viewing system information

Use this procedure to view information for the Central Coding product, the Oracle database, and Windows. You can also view copyright information for the software products used with the Central Coding application.

- Select **Admin > System > System Information**.

The System Information page appears.

Setting flag definitions

Use this procedure to set custom flag definitions. The **Red flag**—(I)nForm Query and **Green flag**—(C)oding Query definitions are enabled by default.

- 1 Select **Admin > System > Coding Flags**.
- 2 Click the **Edit** button.
- 3 In the **Definition** column, designate a meaning for each flag.
- 4 In the **Action** column, select **Enable** or **Disable** to specify whether a flag is available to users.
- 5 Click **Save**.

CHAPTER 10

Synonym lists and synonyms

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About synonym lists

A synonym is a word or phrase that is equivalent to the classification-level term associated with a code in a coding dictionary. Synonyms can exist only in a synonym list. A synonym list is a group of synonyms that are associated with terms in the same dictionary. Dictionary managers and administrators can manage synonym lists.

Each coding definition specifies the synonym list that the autocoding algorithm uses to find a code match for a verbatim. For more information, see *Coding definition management* (on page 78).

Creating a synonym list

- 1 Select **Coding Setup > Synonym Lists**.

The Synonym Lists page appears.

- 2 Click the **New** button.

The [New Synonym List] page appears.

- 3 In the **Name** field, enter a name for the synonym list.
- 4 In the **Dictionary** field, select the dictionary and version to associate with the synonym list.
- 5 Choose how to create the new synonym list.

- To create the new synonym list from the beginning, leave the **Parent** field blank.
- To inherit an existing synonym list, select the synonym list to inherit from the **Parent** field.

When you create a synonym list by inheriting the contents of another list, the child synonym list appears to contain the synonyms from both lists. However, the list contains only its own synonyms; it does not include the synonyms from the inherited list.

You can also copy an existing synonym list. For more information, see *Copying a synonym list* (on page 59).

- 6 Click the **Save** button.

The page refreshes and additional fields appear. For a description of the fields on this page, see *[Synonym List Name] page* (on page 250).

You can now add synonyms to the list. For more information, see *Adding a synonym to a synonym list* (on page 58).

Adding a synonym to a synonym list

A synonym has an **Active** status when added.

- 1 Select **Coding Setup > Synonym Lists**.

The Synonym Lists page appears.

- 2 Click the **Name** link for a synonym list.

The [Synonym List Name] page appears.

- 3 Click the **New** button.

- The [New Synonym] page appears.
- 4 In the **Synonym** field, enter the synonym.
 - 5 Click the **Code** button.
- The Coding Browser dialog box appears in Search mode. The dictionary elements that appear are configured for the coding definition in use.
- 6 Code the synonym. For more information, see *Coding a single item* (on page 17).
- The new synonym, term, and code appear on the [New Synonym] page.
- 7 Click the **Save** button.

Deleting a synonym list

You can delete a synonym list only if it is empty and it is not used in a coding definition.

- 1 Select **Coding Setup > Synonym Lists**.
- The Synonym Lists page appears.
- 2 Select one or more synonym lists.
 - 3 Select **Actions > Delete**.
- A confirmation dialog box appears.
- 4 Click **OK**.
- The Reason for Change dialog box appears.
- 5 In the **Reason** field, enter a description for the change.
 - 6 Click **Accept**.

Copying a synonym list

A copied synonym list is a snapshot of the current content of an existing list. Changes to the new list are not transferred to the original list.

- 1 Select **Coding Setup > Synonym Lists**.
- The Synonym Lists page appears.
- 2 Select a synonym list.
 - 3 Select **Actions > Copy**.
- The [New Synonym List] copied from [Synonym List Name] page appears.
- 4 In the **Name** field, enter a name for the synonym list.
 - 5 If the synonym list has children, select **Include children** to copy the child synonym lists. The resulting synonym list replicates both the structure and the data of the parent synonym list, along with a copy of each child synonym list related to the parent.
 - 6 Click the **Save** button.

Renaming a synonym list

- 1 Select **Coding Setup > Synonym Lists**.
The Synonym Lists page appears.
- 2 Select a synonym list.
- 3 Click the **Edit** button.
The [Synonym List Name] page—Edit appears.
- 4 Enter a new value in the **Name** field.
- 5 Click the **Save** button.

Activating a synonym list

A coding algorithm can use only an **Active** synonym list. An **Active** synonym list can contain individual synonyms that are **Inactive**.

- 1 Select **Coding Setup > Synonym Lists**.
The Synonym Lists page appears.
- 2 Select one or more synonym lists.
- 3 Click the **Activate** button.
The Reason for Change dialog box appears.
- 4 In the **Reason** field, enter a description for the change.
- 5 Click **Accept**.

Deactivating a synonym list

If a coding definition specifies an **Inactive** synonym list, the synonym list is not used.

- 1 Select **Coding Setup > Synonym Lists**.
The Synonym Lists page appears.
- 2 Select one or more synonym lists.
- 3 Select **Actions > Deactivate**.
The Reason for Change dialog box appears.
- 4 In the **Reason** field, enter a description for the change.
- 5 Click **Accept**.

About synonyms

A synonym is a word or phrase that is equivalent to the classification-level term associated with a code in a coding dictionary. Using synonyms increases the chance that the autocoding algorithm will find a code match for a verbatim.

There are two ways to create synonyms:

- A coder suggests a synonym in the coding browser and the dictionary manager or administrator approves it for use. For more information, see *Suggesting a synonym* (on page 19).
- A dictionary manager or administrator adds a synonym to an existing synonym list. For more information, see *Adding a synonym to a synonym list* (on page 58).

Viewing the full coding details for a synonym

- 1 Select **Coding Setup > Synonym Lists**.

The Synonym Lists page appears.

- 2 Click the **Name** link for a synonym list.

The [Synonym List Name] page appears.

- 3 Click the **Code** link for a synonym.

The View Full Coding dialog box appears. For a description of the fields on this page, see *View Full Coding dialog box* (on page 269).

Editing the details for a synonym

- 1 Select **Coding Setup > Synonym Lists**.

The Synonym Lists page appears.

- 2 Click the **Name** link for a synonym list.

The [Synonym List Name] page appears.

- 3 Select a synonym.

- 4 Click the **Edit** button.

The [Synonym Name] page—Edit appears. For a description of the fields on this page, see *[Synonym Name] page—Edit* (on page 254).

- 5 Edit the information on the page.

- 6 Click the **Save** button.

Activating a synonym

You can activate only synonyms that have an **Inactive** status.

- 1 Select **Coding Setup > Synonym Lists**.

The Synonym Lists page appears.

- 2 Click the **Name** link for a synonym list.

- The [Synonym List Name] page appears.
- 3 Select one or more synonyms.
 - 4 Select **Actions > Activate**.
- The Reason for Change dialog box appears.
- 5 In the **Reason** field, enter a description for the change.
 - 6 Click **Accept**.

Deactivating a synonym

An **Active** synonym list can contain **Inactive** synonyms.

- 1 Select **Coding Setup > Synonym Lists**.
- The Synonym Lists page appears.
- 2 Click the **Name** link for a synonym list.
- The [Synonym List Name] page appears.
- 3 Select one or more synonyms.
 - 4 Select **Actions > Deactivate**.
- The Reason for Change dialog box appears.
- 5 In the **Reason** field, enter a description for the change.
 - 6 Click **Accept**.

Promoting a synonym

Use this procedure to add a synonym from an inherited synonym list to its parent list. You can promote only synonyms with the **Active** status.

- 1 Select **Coding Setup > Synonym Lists**.
- The Synonym Lists page appears.
- 2 Click the **Name** link for a synonym list.
- The [Synonym List Name] page appears.
- 3 Select one or more synonyms.
 - 4 Select **Actions > Promote**.
- The Reason for Change dialog box appears.
- 5 In the **Reason** field, enter a description for the change.
 - 6 Click **Accept**.

Accepting a synonym

Use this procedure to accept a proposed synonym and activate it in a synonym list.

- 1 Select **Coding Setup > Synonym Lists**.

- The Synonym Lists page appears.
- 2 Click the **Name** link for a synonym list.
The [Synonym List Name] page appears.
 - 3 Select one or more synonyms.
 - 4 Click the **Accept** button.

Rejecting a synonym

Use this procedure to remove a proposed synonym from a synonym list.

- 1 Select **Coding Setup > Synonym Lists**.
The Synonym Lists page appears.
- 2 Click the **Name** link for a synonym list.
The [Synonym List Name] page appears.
- 3 Select one or more synonyms.
- 4 Click the **Reject** button.
The Reason for Change dialog box appears.
- 5 In the **Reason** field, enter a description for the change.
- 6 Click **Accept**.

Masking a synonym

Inherited synonyms keep the status from the parent synonym list.

Use this procedure to mask a synonym from a child synonym list, so that the autocoding algorithm treats it as **Inactive**.

- 1 Select **Coding Setup > Synonym Lists**.
The Synonym Lists page appears.
- 2 Click the **Name** link for a synonym list.
The [Synonym List Name] page appears.
- 3 Select one or more synonyms.
- 4 Select **Actions > Mask**.
The Reason for Change dialog box appears.
- 5 In the **Reason** field, enter a description for the change.
- 6 Click **Accept**.

Unmasking a synonym

Use this procedure to make a previously masked synonym visible in the child synonym list.

- 1 Select **Coding Setup > Synonym Lists**.
The Synonym Lists page appears.
- 2 Click the **Name** link for a synonym list.
The [Synonym List Name] page appears.
- 3 Select one or more synonyms.
- 4 Select **Actions > Unmask**.
The Reason for Change dialog box appears.
- 5 In the **Reason** field, enter a description for the change.
- 6 Click **Accept**.

CHAPTER 11

Stopword lists and stopwords

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About stopwords lists

A stopword is a word in a verbatim that can be discarded during autocoding because it does not add significant clinical meaning to the verbatim. Stopwords can only exist in a stopword list. A stopword list is a group of stopwords that are associated with terms from different dictionaries through a coding definition. Dictionary managers and administrators can manage stopword lists. A stopword list can be used with any dictionary other than a Japanese dictionary.

Each coding definition specifies the stopword list that the autocoding algorithm uses to remove stopwords from a verbatim. For more information, see *Coding definition management* (on page 78).

Creating a stopword list

- 1 Select **Coding Setup > Stopword Lists**.
The Stopword Lists page appears.
- 2 Click the **New** button.
The [New Stopword List] page appears.
- 3 In the **Name** field, enter a name for the stopword list.
- 4 Choose whether to create the new stopword list from the beginning or by inheriting it from an existing stopword list.
 - To create the new stopword list from the beginning, leave the **Parent** field blank.
 - To inherit an existing stopword list, select the stopword list from the **Parent** field.
When you create a stopword list by inheriting the contents of another list, the child stopword list appears to contain the stopwords from both lists. However, the list contains only its own stopwords; it does not include the stopwords from the inherited list.
- 5 Click the **Save** button.
The page refreshes and additional fields appear. For a description of the fields on this page, see *[Stopword List Name] page* (on page 242).

Adding a stopword to a stopword list

An added stopword appears in the stopword list as having an **Active** status.

- 1 Select **Coding Setup > Stopword Lists**.
The Stopword Lists page appears.
- 2 Click the **Name** link for a stopword list.
The [Stopword List Name] page appears.
- 3 Click the **New** button.
The [New Stopword] page appears.
- 4 In the **Stopword** field, enter the stopword to add.
- 5 Click the **Save** button.

Deleting a stopword list

You can delete a stopword list only if it is empty and if it is not used in a coding definition.

- 1 Select **Coding Setup > Stopword Lists**.
The Stopword Lists page appears.
- 2 Select one or more stopword lists.
- 3 Select **Actions > Delete**.
A confirmation dialog box appears.
- 4 Click **OK**.
The Reason for Change dialog box appears.
- 5 In the **Reason** field, enter a description for the change.
- 6 Click **Accept**.

Copying a stopword list

A copied stopword list is a snapshot of the current content of an existing stopword list. Changes to the new list are not transferred to the original list.

- 1 Select **Coding Setup > Stopword Lists**.
The Stopword Lists page appears.
- 2 Select a stopword list.
- 3 Select **Actions > Copy**.
The [New Stopword List] copied from [Stopword List Name] page appears. For a description of the fields on this page, see *[New Stopword List] copied from [Stopword List Name] page* (on page 203).
- 4 In the **Name** field, enter a name for the stopword list.
- 5 If the stopword list has children, select **Include children** to copy the child stopword lists. The resulting stopword list replicates both the structure and the data of the parent stopword list, along with a copy of each child stopword list related to the parent.
- 6 Click the **Save** button.

Renaming a stopword list

- 1 Select **Coding Setup > Stopword Lists**.
The Stopword Lists page appears.
- 2 Select a stopword list.
- 3 Click the **Edit** button.
The [Stopword List Name] page—Edit appears.
- 4 Enter a new value in the **Name** field.
- 5 Click the **Save** button.

Activating a stopwords list

A coding algorithm can use only an **Active** stopwords list. An **Active** stopwords list can contain individual stopwords that are **Inactive**.

- 1 Select **Coding Setup > Stopword Lists**.
The Stopword Lists page appears.
- 2 Select one or more stopwords lists.
- 3 Click the **Activate** button.
The Reason for Change dialog box appears.
- 4 In the **Reason** field, enter a description for the change.
- 5 Click **Accept**.

Deactivating a stopwords list

If a coding definition specifies an **Inactive** stopwords list, the stopwords list is not used.

- 1 Select **Coding Setup > Stopword Lists**.
The Stopword Lists page appears.
- 2 Select one or more stopwords lists.
- 3 Select **Actions > Deactivate**.
The Reason for Change dialog box appears.
- 4 In the **Reason** field, enter a description for the change.
- 5 Click **Accept**.

About stopwords

A stopword is a word in a verbatim that can be discarded during autocoding because it does not add significant meaning to the verbatim. Using stopwords increases the chance that the autocoding algorithm will find a code match for a verbatim.

Because stopwords are not used in Japanese character sets, Japanese dictionaries do not support stopwords.

A dictionary manager or administrator can create a stopword from the Stopword Lists page.

Activating a stopword

You can activate only stopwords that a dictionary manager or administrator created.

- 1 Select **Coding Setup > Stopword Lists**.
The Stopword Lists page appears.
- 2 Click the **Name** link for a stopword list.
The [Stopword List Name] page appears.
- 3 Select one or more stopwords.
- 4 Select **Actions > Activate**.
The Reason for Change dialog box appears.
- 5 In the **Reason** field, enter a description for the change.
- 6 Click **Accept**.

Deactivating a stopword

An **Active** stopword list can contain **Inactive** stopwords.

- 1 Select **Coding Setup > Stopword Lists**.
The Stopword Lists page appears.
- 2 Click the **Name** link for a stopword list.
The [Stopword List Name] page appears.
- 3 Select one or more stopwords.
- 4 Select **Actions > Deactivate**.
The Reason for Change dialog box appears.
- 5 In the **Reason** field, enter a description for the change.
- 6 Click **Accept**.

Promoting a stopwords

Use this procedure to add a stopwords from an inherited stopwords list to the parent list. You can promote only stopwords with the **Active** status.

- 1 Select **Coding Setup > Stopword Lists**.
The Stopword Lists page appears.
- 2 Click the **Name** link for a stopwords list.
The [Stopword List Name] page appears.
- 3 Select one or more stopwords.
- 4 Select **Actions > Promote**.
The Reason for Change dialog box appears.
- 5 In the **Reason** field, enter a description for the change.
- 6 Click **Accept**.

Accepting a stopwords

Use this procedure to add a created stopwords to a stopwords list.

- 1 Select **Coding Setup > Stopword Lists**.
The Stopword Lists page appears.
- 2 Click the **Name** link for a stopwords list.
The [Stopword List Name] page appears.
- 3 Select one or more stopwords.
- 4 Click the **Accept** button.

Rejecting a stopwords

Use this procedure to remove a stopwords from a stopwords list.

- 1 Select **Coding Setup > Stopword Lists**.
The Stopword Lists page appears.
- 2 Click the **Name** link for a stopwords list.
The [Stopword List Name] page appears.
- 3 Select one or more stopwords.
- 4 Click the **Reject** button.
The Reason for Change dialog box appears.
- 5 In the **Reason** field, enter a description for the change.
- 6 Click **Accept**.

Masking a stopword

Inherited stopwords keep the status from the parent stopword list.

Use this procedure to mask a stopword from a child stopword list, so that the autocoding algorithm treats it as **Inactive**.

- 1 Select **Coding Setup > Stopword Lists**.
The Stopword Lists page appears.
- 2 Click the **Name** link for a stopword list.
The [Stopword List Name] page appears.
- 3 Select one or more stopwords.
- 4 Select **Actions > Mask**.
The Reason for Change dialog box appears.
- 5 In the **Reason** field, enter a description for the change.
- 6 Click **Accept**.

Unmasking a stopword

Use this procedure to make a previously masked stopword visible in the child stopword list.

- 1 Select **Coding Setup > Stopword Lists**.
The Stopword Lists page appears.
- 2 Click the **Name** link for a stopword list.
The [Stopword List Name] page appears.
- 3 Select one or more stopwords.
- 4 Select **Actions > Unmask**.
The Reason for Change dialog box appears.
- 5 In the **Reason** field, enter a description for the change.
- 6 Click **Accept**.

CHAPTER 12

Coding algorithms

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About coding algorithms

The Central Coding application uses a sequence of coding steps called a coding algorithm to autocode verbatims. You can use the default coding algorithm or create a new algorithm using predefined steps.

Creating a coding algorithm

- 1 Select **Coding Setup > Algorithms**.
The Algorithms page appears.
- 2 Click the **New** button.
The [New Algorithm] page appears.
- 3 Enter a name and description for the algorithm.
- 4 Click the **Save** button.
The [Algorithm Name] page appears.

Adding steps to a coding algorithm

- 1 Select **Coding Setup > Algorithms**.
The Algorithms page appears.
- 2 Click the **Name** link for an algorithm.
The [Algorithm Name] page appears.
- 3 Click the **Edit** button.
- 4 Click the **Add** button.
The Add Actions to Algorithm dialog box appears.
- 5 Select the steps to include in the algorithm.
To increase autocoding success, Oracle recommends that you specify the Auto Suggestion step as the first step in the algorithm, and the Eliminate Punctuation step before the Eliminate Stopwords step.
- 6 Click **Accept**.
The [Algorithm Name] page appears.
- 7 Click the **Save** button.

Removing a step from a coding algorithm

- 1 Select **Coding Setup > Algorithms**.
The Algorithms page appears.
- 2 Click the **Name** link for an algorithm.

- The [Algorithm Name] page appears.
- 3 Click the **Edit** button.
 - 4 Select an algorithm step.
 - 5 Click the **Remove** button.
- A confirmation dialog box appears.
- 6 Click **OK**.
- The [Algorithm Name] page appears.
- 7 Click the **Save** button.

Changing the order of steps in a coding algorithm

If you change the order of the steps in an algorithm that is used by a coding definition, the coding results may differ.

- 1 Select **Coding Setup > Algorithms**.
- The Algorithms page appears.
- 2 Click the **Name** link for an algorithm.
- The [Algorithm Name] page appears.
- 3 Click the **Edit** button.
 - 4 In the **Order** field, specify the order in which to run the steps.
- To increase autocoding success, Oracle recommends that you specify the Auto Suggestion step as the first step in the algorithm, and the Eliminate Punctuation step before the Eliminate Stopwords step.
- 5 Click the **Save** button.

Activating or deactivating a coding algorithm

Only coding algorithms with an **Active** status are available for use by a coding definition.

If you deactivate a coding algorithm that is used by a coding definition, the coding definition becomes invalid.

- 1 Select **Coding Setup > Algorithms**.
- The Algorithms page appears.
- 2 Select one or more algorithms.
 - 3 Select **Actions > Activate** or **Actions > Deactivate**.
- The Reason for Change dialog box appears.
- 4 In the **Reason** field, enter a description for the change.
 - 5 Click **Accept**.

Deleting a coding algorithm

You can delete only coding algorithms with an **Inactive** status.

If you delete a coding algorithm that is used by a coding definition, the coding definition becomes invalid.

- 1 Select **Coding Setup > Algorithms**.

The Algorithms page appears.

- 2 Select an algorithm with an **Inactive** status.

- 3 Select **Actions > Delete**.

A confirmation dialog box appears.

- 4 Click **OK**.

The Reason for Change dialog box appears.

- 5 In the **Reason** field, enter a description for the change.

- 6 Click **Accept**.

CHAPTER 13

Coding definitions and auto-suggestions

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About coding definitions

A coding definition is a set of parameters that is used in conjunction with assignment rules to process incoming requests.

A coding definition:

- Is associated with a coding dictionary.
- Consists of a synonym list, stopword list, and coding algorithm.
- Controls the dictionary elements that appear in the user interface and are returned to the source application. For more information, see *About configuring dictionary elements* (on page 88).

You can create, manage, and delete coding definitions. You can also view the auto-suggestions that are associated with a coding definition and specified verbatim. For information on auto-suggestions, see *About auto suggestions* (on page 80).

Creating a coding definition

- 1 Select **Coding Setup > Coding Definitions**.
The Coding Definitions page appears.
- 2 Click the **New** button.
The [New Coding Definition] page appears.
- 3 Enter a name and a description for the coding definition.
- 4 Select the following for the coding definition:
 - Dictionary
 - Active synonym list
 - Active stopword list
 - Active coding algorithm
- 5 Click the **Save** button.

Editing a coding definition

Changing the details of a coding definition while the definition is in use may lead to coding inconsistencies.

- 1 Select **Coding Setup > Coding Definitions**.
The Coding Definitions page appears.
- 2 Click the **Name** link for a coding definition.
The [Coding Definition Name] page appears.
- 3 Edit the information on the page.
- 4 Click the **Save** button.

Deleting a coding definition

You can only delete a coding definition only if it is not assigned to any coding requests.

- 1 Select **Coding Setup > Coding Definitions**.
The Coding Definitions page appears.
- 2 Select a coding definition.
- 3 Select **Actions > Delete**.
A confirmation dialog box appears.
- 4 Click **OK**.
The Reason for Change dialog box appears.
- 5 In the **Reason** field, enter a description for the change.
- 6 Click **Accept**.

About auto-suggestions

An auto-suggestion is a unique coding response that coders can apply to requests with the same verbatim, coding definition, and context information during manual coding. This response maps the verbatim to a specific dictionary path.

Using auto-suggestions increases accuracy and consistency in coding.

In a dictionary, a verbatim might be associated with more than one term and code on a hierarchical level, resulting in more than one possible path.

- If one of these paths is the primary path, the Central Coding application uses that path to autocode the verbatim. This path includes the code, term, and dictionary level, and can be specified using dictionary element configuration. For more information, see *About configuring dictionary elements* (on page 88).
- If none of the paths is a primary path, the autocode algorithm cannot select a secondary path until a dictionary manager creates an auto-suggestion for a verbatim.

Coding definitions cannot share auto-suggestions. For multiple studies to share the same auto-suggestion, you must create a coding definition that includes the auto-suggestion for each dictionary that applies to the studies.

Creating an auto-suggestion

- 1 If not enabled by default, enable the auto-suggestion feature in the coding browser. For more information, see *Enabling the auto-suggestion feature* (on page 81).
- 2 Specify a secondary autocode target for the coding definition on the Element Configuration page. For more information, see *Configuring autocode targets* (on page 88).

The Central Coding application uses the secondary autocode target to provide a list of possible codes for a term. The possible codes appear in the coding browser during interactive coding.

- 3 During interactive coding, specify a coding response as an auto-suggestion. For more information, see *Coding a single item* (on page 17) or *Coding an item and propagating the value* (on page 18).

The Central Coding application applies the selected coding response to all new incoming requests with the same verbatim, coding definition, and context information.

If the assignment rule associated with the incoming requests specifies that the code value from the coding response requires approval, the auto suggestion becomes active only after the code value is approved.

Enabling the auto-suggestion feature

- 1 Add the Auto Suggestion step to a coding algorithm. For more information, see *Adding steps to a coding algorithm* (on page 74).
- 2 Apply the coding algorithm to a coding definition. For more information, see *Editing the details of a coding definition* (on page 78).
- 3 If not selected by default, select **Use as Auto Suggestion** in the coding browser for a verbatim that uses the coding definition.

Note: If you select **Use as Auto Suggestion** in the coding browser but the Auto Suggestion step is not part of the coding algorithm, the Central Coding application saves auto-suggestions to the database but does not use them for coding.

Deleting an auto-suggestion

- 1 Select **Coding Setup > Coding Definitions**.
The Coding Definitions page appears.
- 2 Select a coding definition.
- 3 Select **Actions > Manage Auto Suggestions**.
The Auto Suggestions page appears. For a description of the fields on this page, see *Auto Suggestions page* (on page 162).
- 4 Select an auto-suggestion.
- 5 Select **Actions > Delete**.
A confirmation dialog box appears.
- 6 Click **OK**.

CHAPTER 14

Assignment rules

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About assignment rules

An assignment rule is a set of criteria that defines how incoming coding requests are routed in the Central Coding application. You can use assignment rules in conjunction with coding definitions and work teams to control the request-processing workflow.

Assignment rules control:

- Whether the Central Coding application attempts to autocode an incoming request.
- How the Central Coding application handles approvals and reviews and returns deliveries to the source application.
- Which work team the Central Coding application assigns to a request.
- Which coding definition the Central Coding application associates with a rule.
- Whether the Central Coding application deletes coding requests after delivery.

Creating an assignment rule

- 1 Select **Coding Setup > Assignment Rules**.

The Assignment Rules page appears.

- 2 Click the **New** button.

The [New Assignment Rule] page appears.

- 3 In the **Rule Properties** section:

- a Enter a unique name and a description for the assignment rule.
- b Select the coding definition to which to assign requests that satisfy the assignment rule.

The status must be **Active** for the synonym list, stopword list, and algorithm that the selected coding definition uses.

- c Select the review and approval settings for the assignment rule. For more information, see *[New Assignment Rule] page* (on page 194).

- 4 In the **Rule Text and Workteam Assignment** section:

- a Define the rule expression.

Although you can manually enter an expression in the Rule text box, Oracle recommends that you use the Request property, Operator, and Value fields to avoid invalid syntax.

- 1 In the **Request property** field, select the property on which to base the assignment rule.
- 2 Select an operator.
- 3 In the **Value** field, enter the value for the selected request property.


Note: If the data in the Value field is invalid, the Central Coding application cannot assign incoming requests using the assignment rule.

- 4 Click the (+) icon.

The expression appears in the **Rule text** field in simple syntax language.

For example, if you select DictionaryType as property, the equal sign as operator, and

JDRUG as value, the rule expression is EQ (DictTYpe, 'JDRUG').

- b To check the syntax of the rule text, click the  icon.
The syntax does not verify characters that signal the end of a line or that are non-printable.
 - c In the **Select work teams** section, select the work teams to which to assign the requests that are processed by this rule.
- 5 Click the **Save** button.

Editing an assignment rule


Oracle recommends that you remove any affected studies from job schedules before you edit and assignment rule. For more information, see *Removing a study from a job schedule* (on page 134).

After you change an assignment rule, you can run the rule manually only on unassigned requests.

- 1 Select **Coding Setup > Assignment Rules**.
The Assignment Rules page appears.
- 2 Select a rule.
- 3 Click the **Edit** button.
The [Assignment Rule Name] page appears. For a description of the fields on this page, see *[New Assignment Rule]/[Assignment Rule Name] page* (on page 194).
- 4 Edit the information on the page.
- 5 Click the **Save** button.

Changing the order in which assignment rules run

Oracle recommends that you organize assignment rules so that the rules most likely to match the incoming requests appear first on the Assignment Rules page. Assignment rules run in the order they appear on the Assignment Rules page. Copied assignment rules appear after original rules.

- 1 Select **Coding Setup > Assignment Rules**.
The Assignment Rules page appears.
- 2 In the **Order** field, specify the order in which to run the rules.
- 3 Click **Refresh** .

Deleting an assignment rule

- 1 Select **Coding Setup > Assignment Rules**.
The Assignment Rules page appears.
- 2 Select a rule.
- 3 Select **Actions > Delete**.

CHAPTER 15

Dictionary element configuration

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About configuring dictionary elements

A dictionary element is an item that corresponds to a code, term, and piece of additional information in a coding dictionary level. Each coding dictionary has its own set of elements.

The Central Coding application provides default element configuration settings for each dictionary. However, you can use element configuration options to specify which coding features and information are available in the user interface at the following levels:

- Dictionary level—Specify which elements are available when you create a new coding definition and when you use a dictionary without using a coding definition (for example, when you browse a dictionary).
- Coding definition level—Specify which elements are available when you work with the configured coding definition.

The element configuration settings determine the:

- Autocode targets.
- Information that appears on the request list view pages and in the coding browser displays.
- Dictionary elements that are saved in the database and can be returned to the source application with a coding match.
- Dictionary elements that can be exported to an external application with the request.
- Data items to be reconciled during impact analysis.

Configuring autocode targets

Use this procedure to select the autocode targets that the Central Coding application uses when autocoding a request against a selected dictionary or coding definition. The selection overrides the default autocode targets for the dictionary or the existing autocode targets for the coding definition.

Oracle recommends:

- Setting the autocode targets first for a new coding definition.
- Running the impact analysis process for an existing coding definition with changed autocode targets.

- 1 To configure autocode targets at the dictionary level, select **Coding Setup > Dictionaries**.

The Dictionaries page appears.

or

To configure autocode targets at the coding definition level, select **Coding Setup > Coding Definitions**.

The Coding Definitions page appears.

- 2 Select a dictionary.

or

Select a coding definition.

- 3 Select **Actions > Element Configuration**.

The Element Configuration page appears. For a description of the fields on this page, see *Element Configuration page* (on page 184).

- 4 In the **Elements** section, select the dictionary element to use as the autocode target and, optionally, secondary target:
 - **Autocode Target** for the element to use as the primary autocode target. Each dictionary has a default primary autocode target that consists of a code, term, and dictionary level.
 - **Secondary Target** for the element to use for autocoding to something other than the primary autocode target. The secondary target is one level higher than the primary autocode target in the coding dictionary.

Note: There are no secondary autocode targets for the JDrug dictionary.

- 5 Click the **Save** button.

Configuring elements in the request list pages

Use this procedure to configure which fields appear on the list pages for coding requests associated with a particular dictionary or coding definition. The request list pages include the Coding Requests, Approvals, and All Requests pages. You can add, reorder, and remove elements.

- 1 To configure dictionary elements at the dictionary level, select **Coding Setup > Dictionaries**.

The Dictionaries page appears.

or

To configure dictionary elements at the coding definition level, select **Coding Setup > Coding Definitions**.

The Coding Definitions page appears.


- 2 Select a dictionary.


or




Select a coding definition.

- 3 Select **Actions > Element Configuration**.

The Element Configuration page appears. For a description of the fields on this page, see *Element Configuration page* (on page 184).

- 4 In the **Elements > Request List** section, click the **Add to Request List** () icon for each element to include in the coding requests list.

The **Add to Request List** () icon appears only for the level term elements that have been configured to be returned with a coding.

- 5 In the **Request List Page Display** section, reorder the elements as desired to appear in the coding request list.
 - a Click the **Move up** () icon to move the element up to the left in the list.
 - b Click the **Move down** () icon to move the element to the right in the list.
 - c Click the **Remove** () icon to remove the element from the list.

- 6 Click the **Save** button.

Configuring elements in the coding browser

Use this procedure to configure the fields that appear in the coding browser for the requests associated with a particular dictionary type or coding definition. You can add, reorder, and remove elements.

- 1 To configure dictionary elements at the dictionary level, select **Coding Setup > Dictionaries**.

The Dictionaries page appears.

or

To configure dictionary elements at the coding definition level, select **Coding Setup > Coding Definitions**.

The Coding Definitions page appears.

- 2 Select a dictionary.

or

Select a coding definition.

- 3 Select **Actions > Element Configuration**.

The Element Configuration page appears. For a description of the fields on this page, see *Element Configuration page* (on page 184).

- 4 In the **Elements** section, select the elements to include in the coding browser by clicking the corresponding **Add** (+) icon.

The (+) icon turns grey and the selected elements appear in the **Page Display** section for the coding browser.

- 5 In the **Page Display** sections, reorder the elements as desired to appear in the coding browser.

- a Click the **Move up** (↑) icon to move the element up to the left in the coding browser.

- b Click the **Move down** (↓) icon to move the element to the right in the coding browser.

- c Click the **Remove** (✖) icon to remove the element from the coding browser.

- 6 Select **Include Code** for each element to display the code with the term.

- 7 Select **Include Label** for each element to label in Browse mode.

- 8 Select **In Field** for each element to include in the In Field drop-down list in the coding browser in Search mode.

The Central Coding application uses the dictionary elements you specify to search for a code.

- 9 Click the **Save** button.

Configuring elements returned with a coding match

Use this procedure to indicate, for each dictionary element, whether to:

- Return the data to the source application.
- Save the data in the Central Coding database.
- Export the data in a report.
- Export the element to an external application with the coding request.

- 1 To configure dictionary elements at the dictionary level, select **Coding Setup > Dictionaries**.

The Dictionaries page appears.

or

To configure dictionary elements at the coding definition level, select **Coding Setup > Coding Definitions**.

The Coding Definitions page appears.

- 2 Select a dictionary.

or

Select a coding definition.

- 3 Select **Actions > Element Configuration**.

The Element Configuration page appears. For a description of the fields on this page, see *Element Configuration page* (on page 184).

- 4 In the **Elements** section, select the elements to return or export with a coding match.
 - a Select **Return** for each element to save to the database and return to the source application with a coding match.

Note: When you select **Return** for an element, **Requires Reconciliation** is also selected for the element. You can then edit both selections.

- b Select **Requires Reconciliation** for each element for which to require interactive reconciliation during impact analysis. For more information, see *Setting the dictionary elements to require reconciliation* (on page 105).
 - c Select **Exportable** for each element to export.
- 5 Click the **Save** button.

About resetting dictionary elements

You can reset the element configuration settings for a coding definition at any time to return to the initial settings defined for the associated dictionary.

Changing the settings for a dictionary while the dictionary is in use may lead to coding inconsistencies.

Resetting elements for a coding definition

- 1 Select **Coding Setup > Coding Definitions**.
The Coding Definitions page appears.
- 2 Select one or more coding definitions.
- 3 Select **Actions > Reset Element Configuration**.
A confirmation dialog box appears.
- 4 Click **OK**.

CHAPTER 16

Ongoing management

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- About system locks.....98
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About jobs and job logs

Viewing the job log

The job log displays information about the Get Requests and Return Codes jobs. The Central Coding application deletes log entries from the database after 45 days.

To view the job log for one adapter:

- 1 Select **Admin > Management > Studies**.

The Study Information page appears.

- 2 In the **Get Requests** or **Return Codes** column, click the **View Log** () icon for an adapter.

The View Job Log page appears. For a description of the fields on this page, see *View Job Log page* (on page 270).

To view the job log for all adapters:

- Select **Admin > System > Jobs**.

The View Job Log page appears. For a description of the fields on this page, see *View Job Log page* (on page 270).

Deleting a job

- 1 Select **Admin > System > Jobs**

The View Job Log page appears.

- 2 Select a job.

- 3 Select **Actions > Delete Job**.

A confirmation dialog box appears.

- 4 Click **OK**.

Stopping a job

- 1 Select **Admin > System > Jobs**

The View Job Log page appears.

- 2 Select the job to stop.

- 3 Select **Actions > Stop Job**.

A confirmation dialog box appears.

- 4 Click **OK**.

About managing coding requests

Administrators can view the work team assignments and audit history for coding requests that are in locked or unlocked studies and that are assigned to all the work teams.

Coders and approvers can view only the requests that are in unlocked studies and that are assigned to their work teams.

Viewing the details of a coding request

- 1 Select **Admin > Management > Requests**.

The All Requests page appears.

- 2 Filter the list of requests using the available fields.
- 3 Click **Apply**.
- 4 Click the **Details** link for a request.

The Request Details page appears. For a description of the fields on this page, see *Request Details page* (on page 230).

Editing the work team assignment for a coding request

Assignment rules can route coding requests when the requests are assigned to a work team.

- 1 Select **Admin > Management > Requests**.
- 2 Select a request.
- 3 Click the **View Work Team Assignments** button.

The Workteam Assignment page appears.

- 4 Click the **Edit** button.
- 5 Edit the information on the page.
- 6 Click the **Save** button.

Viewing the details of an unassigned coding request

- 1 Select **Coding Setup > Unassigned Requests**.

The Unassigned Requests page appears.

- 2 Click the **Details** link for a request.

The Request Details page appears. For a description of the fields on this page, see *Request Details page* (on page 230).

Running assignment rules on unassigned requests

Use this procedure to update an assignment rule and then manually run the rule on an unassigned request to route the request.

- 1 Select **Coding Setup > Unassigned Requests**.
The Unassigned Requests page appears.
- 2 Select an unassigned coding request.
- 3 Click the **Run Assignment Rules** button.

Resending an undeliverable request

Use this procedure to change the status of a request with a failed delivery to the source application to **Completed, awaiting delivery**. Changing the status allows the request to be picked up by the job queue so that it can be resent to the source application at the next scheduled time.

- 1 Select **Coding Requests**.
The Coding Requests page appears.
- 2 Select a request with a delivery status of **Undeliverable, retry (✖)**.
To view the reason the delivery was unsuccessful, point to the **Undeliverable, retry (✖)** icon.
For more information, see *Error messages for undeliverable requests* (on page 97).
- 3 Select **Actions > Retry Delivery**.

Resending all undeliverable requests

Use this procedure to change the status of requests with failed deliveries to the source application to **Completed, awaiting delivery**. Changing the status allows the requests to be picked up by the job queue so that they can be resent to the source application at the next scheduled time.

- 1 Select **Admin > Management > Requests**.
The All Requests page appears.
- 2 Select **Actions > Retry Delivery for All**.

Error messages for undeliverable requests

Error message	Description/Solution
User not found	<p>Description: The Central Coding application could not find a source application system user.</p> <p>Solution: Add a system user in the source application.</p>
Verbatim data value does not match or has changed	<p>Description: The verbatim changed in the source application after it was sent to the Central Coding application.</p> <p>Solution: No action is needed. The verbatim will be updated in the Central Coding application at the next scheduled update.</p>
Coding Value not updated: Page Deleted	<p>Description: The page was deleted in the source application after the verbatim was sent to the Central Coding application. The item could not be delivered.</p> <p>Solution: No action is needed. The verbatim will be deleted at the next scheduled update.</p>
Value not updated: Itemset row deleted	<p>Description: The itemset was deleted in the source application and the item could not be delivered.</p> <p>Solution: No action is needed. The verbatim will be deleted at the next scheduled update.</p>
Trial not found	<p>Description: The communication between the Central Coding and the source application was not working at the time of delivery.</p> <p>Solution: Retry the delivery. If the request is still undeliverable, contact your system administrator.</p>
Code map not found	<p>Description: During an upgrade, the source application created new mappings and user IDs with the same RefName instead of mapping revisions.</p> <p>As a result, verbatims recoded in Central Coding became undeliverable to the source application.</p> <p>Solution: If the source application is InForm, Oracle recommends that you upgrade to InForm version 6.1.1. If the source application is not InForm, contact Oracle Customer Support.</p>

About system locks

You view locked objects and revoke locks so that other users can access the objects.

Objects are locked in the Central Coding application when a logged-on user is editing them. The application unlocks an object when the user is done editing. However, if there is a system failure before the lock is removed, or the user does not remove the lock, you might have to manually remove the lock.

Viewing locked objects and revoking a lock

When you revoke a lock, any unsaved changes made to the object are lost.

- 1 Select **Admin > System > Locks**.

The Locks page appears. For a description of the fields on this page, see *Locks page* (on page 190).

- 2 Select one or more objects.
- 3 Click the **Revoke** button.

About coding request and audit data deletion

After a verbatim has been coded and returned to the source application, you can delete the information for the coding request from the Central Coding database. Optionally, you can also delete the audit data for the request from the database tables.

This functionality is useful when your environment is integrated with a source application other than InForm or Clintrial, and the coding request and audit data are no longer needed after the verbatim is coded and delivered.

Configuring the deletion of coded requests and audit data

- 1 Select **Admin > System > System Configuration**.
- 2 The System Configuration page appears. For a description of the fields on this page, see *System Configuration page* (on page 255).
- 3 Select **Show Delete Request After Delivery Option**.
The **Delete request after delivery** option is enabled for all assignment rules.
- 4 Select **Delete Request Audit Information** for the Central Coding application to delete the audit trail information for delivered coding requests.

If a request is deleted based on the **Delete request after delivery** setting, the corresponding audit records are also deleted.

Deleting coded requests and audit data for an assignment rule

- 1 Select **Coding Setup > Assignment Rules**.
The Assignment Rules page appears.
- 2 Click the **Name** link for an assignment rule.
The [Assignment Rule Name] page appears.
- 3 Select **Delete request after delivery**.
The coding requests that have been coded in the Central Coding application and delivered to the source application are deleted for the assignment rule.

About the Audit History Report

You can run an Audit History Report to track system activities for a coding request. The report is in Rich Text Format (RTF).

The Central Coding application audits changes to:

- Users, roles, rights, and work teams.
- Coding request information.
Includes changes to codes, terms, dictionary version, and the reason for change.
- Coding request statuses.
Includes approvals.
- Dictionaries.
Includes changes to synonym lists associated with the dictionary and changes from impact analysis.
- Synonym lists.
- Stopword lists.
- Algorithms.

The application records the user that makes the change, and the date and time of the change. Changes do not overwrite previously recorded information. The audit trail is an incremental, chronological trail of each change and the reason for the change.

The source application audits only changes to coded values.

Producing the Audit History report

- 1 Select **Admin > Management > Requests**.

The All Requests page appears.

- 2 Select a request.

- 3 Click the **View Audit History** button.

The Audit History Report page appears. The dates in the report use the date format set on the System Configuration page.

About dictionary information

A coding dictionary is a standardized collection of terms and the codes that correspond to those terms.

Coding dictionaries are not included in the Central Coding installation and must be installed separately. A dictionary manager loads dictionaries and language packs in the Central Coding application using the Dictionary Loader tool. You cannot add or remove dictionaries using the Central Coding user interface.

You can view the list of loaded dictionaries and the details for each dictionary, or use the coding browser to become familiar with the terms in the dictionary hierarchy.

Viewing the details for an installed dictionary

- 1 Select **Coding Setup > Dictionaries**.

The Dictionaries page appears.

- 2 Select a dictionary.
- 3 Click the **View Details** button.

The [Dictionary Name] page appears. For a description of the fields on this page, see *[Dictionary Name] page* (on page 182).

Browsing the dictionary hierarchy

You can view the terms associated with the dictionary hierarchy in the coding browser. This view of the coding browser is for reviewing only, not coding.

- 1 Select **Coding Setup > Dictionaries**.

The Dictionaries page appears.

- 2 Select a dictionary.
- 3 Select **Actions > Browse Dictionary**.

The Coding Browser dialog box appears in Search mode by default.

- 4 Click the **Browse**  icon.

The dialog box refreshes. For a description of the fields on this page, see *Coding Browser dialog box* (on page 166).

The hierarchy of terms for the selected dictionary appears in a tree format in the display area at the bottom of the dialog box.

- 5 Expand and collapse the tree to view the terms in the dictionary hierarchy.

CHAPTER 17

Impact analysis

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About impact analysis

You can run the impact analysis process to change the dictionary version in use to a newer version. The Central Coding application supports impact analysis for both standard and custom dictionary types.

Checklist—Configuring your system to work with impact analysis

<input checked="" type="checkbox"/> Step	Task	For more information, see
<input type="checkbox"/> 1	Verify that a new standard or custom dictionary version is uploaded.	<i>Installation Guide.</i>
<input type="checkbox"/> 2	Verify that you have the following rights: <ul style="list-style-type: none"> • View System Configuration • Manage Job Queues • View Study Lock • Manage Study Lock • Reconcile Synonyms • Reconcile Verbatims • Edit Coding Definitions • Edit Synonym Lists • Run Impact Analysis 	<i>Viewing or editing the details of a role</i> (on page 49).
<input type="checkbox"/> 3	Stop the Get Requests and Return Codes jobs for each study related to the dictionary to upgrade. This step prevents the Central Coding application from receiving new verbatims during the upgrade process.	<i>Stopping a job</i> (on page 94).
<input type="checkbox"/> 4	Set impact analysis parameters.	<ul style="list-style-type: none"> • <i>Setting impact analysis parameters</i> (on page 105). • <i>System Configuration page</i> (on page 255).

☑	Step	Task	For more information, see
☐	5	Set the dictionary elements to require reconciliation.	<ul style="list-style-type: none"> • <i>Setting the dictionary elements to require reconciliation</i> (on page 105). • <i>Reconciling a verbatim</i> (on page 118) • <i>Reconciliation Options page</i> (on page 226).
☐	6	Set the default reconciliation options for verbatims.	<ul style="list-style-type: none"> • <i>Setting the default reconciliation options for verbatims</i> (on page 106). • <i>Element Configuration page</i> (on page 184)

Setting impact analysis parameters

- 1 Select **Administration > System > System Configuration**.
The System Configuration page appears. For a description of the fields on this page, see *System Configuration page* (on page 255).
- 2 Click the **Edit** button.
- 3 Edit the information in the Impact Analysis Options section.
- 4 Click the **Save** button.

Setting the dictionary elements to require reconciliation

At the dictionary level or coding definition level, you select the elements that require reconciliation during impact analysis.

Verbatims with differences in coding at each of the dictionary levels that you select for reconciliation appear on the Reconcile Verbatims page.

- 1 To configure dictionary elements at the dictionary level, select **Coding Setup > Dictionaries**.

The Dictionaries page appears.

or

To configure dictionary elements at the coding definition level, select **Coding Setup > Coding Definitions**.

The Coding Definitions page appears.

- 2 Select a dictionary.

or

Select a coding definition.

- 3 Select **Actions > Element Configuration**.

The Element Configuration page appears. For a description of the fields on this page, see *Element Configuration page* (on page 184).

- 4 In the **Elements** section, select **Requires Reconciliation** for each dictionary level to require reconciliation during impact analysis.

Setting the default reconciliation options for verbatims

You can modify individual selections as needed when you reconcile verbatims. For more information, see *Reconciling a verbatim* (on page 118).

- 1 Select **Admin > System > Reconciliation Options**.

The Reconciliation Options page—View mode appears.

- 2 Click the **Edit** button.

The Reconciliation Options page appears. For a description of the fields on this page, see *Reconciliation Options page* (on page 226).

- 3 In the **Default Actions** column, select the option to be automatically selected on the **Reconcile Verbatims** page.

The options are available based on the **Allow Uncode** setting on the System Configuration page.

- **Accept New**—Selects the new autocode result (code, term, and path) in the **New Code and Term** column.
- **Keep Original**—Selects the coding (code, term, and path) in the **Original Code and Term** column.
- **Uncoded**—Selects the **Uncode** option in the **Accept Uncode** column.

This option:

- Is available only if **Allow Uncode** is selected on the System Configuration page.
 - Allows the Central Coding application to clear the code value and return the verbatim to the coder's queue to be recoded in standard workflow, so that you can complete the impact analysis process.
- 4 Click the **Save** button.

Comparing dictionary versions

Running a dictionary version comparison

Use this procedure to compare two installed versions of a standard or custom dictionary. The versions must be of the same type and culture.

You can then export changes in terms or paths to a Comma-Separated Value (CSV) file.

- 1 Select **Coding Setup > Dictionaries**.

The Dictionaries page appears.

- 2 Select **Actions > View Dictionary Changes**.

The Dictionary Changes page appears.

- 3 Click the **New** button.

The Dictionary Selection dialog box appears.

- 4 Select two dictionary versions.

- 5 Click **OK**.

The Dictionary Changes page appears.

The comparison appears with a **Complete** status.

- 6 Select the dictionary version comparison.

- To view term changes:

- a Click the **View Term Changes** button.

The Term Changes page appears. For a description of the fields on this page, see *Term Changes page* (on page 262).

- b Select a dictionary level and a type of change to view.

- To view path changes:

- a Click the **View Path Changes** button.

The Path Changes page appears. For a description of the fields on this page, see *Path Changes page* (on page 207).

- b In the **Level** field, select a dictionary level.

- c Click the **View Path Changes** link for a term.

The View Path Changes Details dialog box appears. For a description of the fields on this page, see *View Path Changes Details dialog box* (on page 272).

Exporting a dictionary version comparison

You can export changes in terms or paths between two installed versions of a dictionary to a Comma-Separated Value (CSV) file.

- 1 Select **Coding Setup > Dictionaries**.

The Dictionaries page appears.

- 2 Select a dictionary type.

- 3 Select **Actions > View Dictionary Changes**.

The Dictionary Changes page appears.

- 4 Select the dictionary version comparison with a **Complete** status.

- To export term changes:

- a Click the **View Term Changes** button.

The Term Changes page appears. For a description of the fields on this page, see *Term Changes page* (on page 262).

- b Select a dictionary level and a type of change to view.

- c In the **Change** field, select a type of change.

- To export path changes:

- a Click the **View Path Changes** button.

The Path Changes page appears. For a description of the fields on this page, see *Path Changes page* (on page 207).

- b In the **Level** field, select a dictionary level.

- c Click the **View Path Changes** link for a term.

The View Path Changes Details dialog box appears. For a description of the fields on this page, see *View Path Changes Details dialog box* (on page 272).

- 5 Click the **Export** button.

The Document Viewer page appears with the Windows File Download dialog box.

- 6 Open or save the file.

Deleting a dictionary version comparison

- 1 Select **Coding Setup > Dictionaries**.

The Dictionaries page appears.

- 2 Select **Actions > View Dictionary Changes**.

The Dictionary Changes page appears.

- 3 Select a dictionary version comparison.

- 4 Select **Actions > Delete**.

A confirmation dialog box appears.

- 5 Click **OK**.

Rerunning a dictionary version comparison

Use this procedure to rerun a dictionary version comparison with a status of **Failed**.

- 1 Select **Coding Setup > Dictionaries**.

The Dictionaries page appears.

- 2 Select **Actions > View Dictionary Changes**.

The Dictionary Changes page appears.

3 Select a dictionary comparison.

4 Select **Actions > Rerun**.

A confirmation dialog box appears.

5 Click **OK**.

Performing impact analysis

Association methods

For the Central Coding application to use a new dictionary version to code, you must associate the dictionary version with a valid coding definition and synonym list.

The coding definition or synonym list can be:

- New—Created for the new dictionary version.
- Existing—Associated with the dictionary version in use.

To use an existing coding definition or synonym list with the new dictionary version, you must upgrade the definition or list. For more information, see *Upgrading a coding definition* (on page 116) and *Upgrading a synonym list* (on page 113).

If there are differences in the codes or the synonyms used to code verbatims, you must reconcile the differences before the new dictionary version comes into use. For more information, see *Reconciling a verbatim* (on page 118) and *Reconciling a synonym* (on page 115).

Running impact analysis

As part of the impact analysis process, you perform an impact assessment on the coding definition to use with the new dictionary version.

Use this procedure to:

- Compare the code values associated with the coding definition in use to the code values associated with the new coding definition.
 - Reconcile any changes in code values.
- 1 Select **Coding Setup > Coding Definitions**.
The Coding Definitions page appears.
 - 2 Select **Actions > Run Impact Analysis**.
The Choose Source And Target Coding Definitions dialog box appears.
 - 3 Specify the coding definitions to compare:
 - **Source Coding Definition Name**—The coding definition for the original dictionary version.
 - **Target Coding Definition Name**—The coding definition for the new dictionary version.
 - 4 To autoreconcile term changes between the original and new dictionary versions at each dictionary level, select **Auto Reconcile Terms**. You must then manually reconcile the codes on the Reconcile Verbatims page.

Note: The application autoreconciles the terms in the new coding definition even if the **Requires Reconciliation** option is selected for an element on the Element Configuration page.

- 5 Click **OK**.

The In Process page appears. For a description of the fields on this page, see *In Process page*

(on page 188).

6 Do one of the following:

- If there are code differences between the dictionary versions, the **Step** column displays the **Reconcile** status.

Reconcile the verbatims, approve the changes, and save them to the database.

For more information, see *Reconciling a verbatim* (on page 118) and *Saving verbatim changes to the database* (on page 118).

- If there are no code differences between the dictionary versions, the **Step** column displays the **Update** status.

Update the verbatims based on the descriptions in *Saving verbatim changes to the database* (on page 118).

To view the updated status of the verbatims, run the Impact Analysis Report. For more information, see *Running the Impact Analysis Report* (on page 120).

Canceling impact analysis

After you start the upgrade process for a coding definition, you can no longer cancel impact analysis.

1 Select **Coding Setup > Impact Analysis**.

The In Process page appears.

2 Select a coding definition with a step and status of:

- Reconcile—Not Started
- Reconcile—In Process
- Update—Not Started

3 Select **Actions > Cancel**.

A confirmation dialog box appears.

4 Click **OK**.

Performing optional analysis tasks

As part of the impact analysis process, you may need to perform additional upgrade and reconciliation tasks. These tasks are required only if:

- You want to use the same coding definition, assignment rules, and synonym list with the new dictionary version.
- Differences exist between dictionary versions in the codes and synonyms used to code verbatims.

Checklist—Performing optional analysis tasks

<input checked="" type="checkbox"/> Step	Task	For more information, see
<input type="checkbox"/> 1	Upgrade the synonym list associated with the original dictionary version.	<i>Upgrading a synonym list</i> (on page 113).
<input type="checkbox"/> 2	Reconcile the synonyms in the new synonym list.	<i>Reconciling a synonym</i> (on page 115).
<input type="checkbox"/> 3	Save synonym changes to the database.	<i>Saving synonym changes to the database</i> (on page 115).
<input type="checkbox"/> 4	Upgrade the coding definition associated with the original dictionary version.	<i>Upgrading a coding definition</i> (on page 116).
<input type="checkbox"/> 5	Reconcile changes in coding between dictionary versions for verbatims.	<i>Reconciling a verbatim</i> (on page 118).
<input type="checkbox"/> 6	Save the verbatim changes to the database.	<i>Saving verbatim changes to the database</i> (on page 118).

Synonym list upgrade management

You create an upgraded synonym list by updating an existing synonym list against a new dictionary version, reconciling the differences, and saving the changes to the database.

When you upgrade a synonym list, the Central Coding application copies the following synonyms to the new synonym list:

- Synonyms for which the associated term and code still exist, are active in the new dictionary version, and map to the same primary System Organ Class. The synonyms are assigned a status of **Active**.
- Synonyms for which the associated term and code still exist and are active in the new dictionary version, but which map to a different primary System Organ Class. The synonyms are assigned a status of **Active**.
- Synonyms for which the associated term and code are inactive in the new dictionary version, but which the Central Coding application can automatically reassign to a term. The synonyms retain the status that they had before the upgrade.
- Synonyms for which the associated term and code no longer exist or are no longer current in the new dictionary version appear on the Reconcile Synonyms page. You can copy the synonyms to the new synonym list or delete them.

Synonyms that are terms in the new dictionary version are not copied to the new synonym list.

If a synonym is associated with a term that is assigned a new code, or with a code that is assigned to a new term, the Central Coding application considers the original term and code to be deleted.

After you upgrade a synonym list, you must reconcile the synonyms on the Reconcile Synonyms page by interactively coding them or deleting them from the new synonym list. For more information, see

Reconciling a synonym (on page 115).

Upgrading a synonym list

Use this procedure to create a new synonym list for the new dictionary version by upgrading an existing synonym list.

Upgraded synonym lists have a status of **Update—Complete**.

After you upgrade a synonym list to a dictionary version, you cannot upgrade the synonym list to the same dictionary version again.

If the synonym list to upgrade is an inherited synonym list, the parent synonym list is also upgraded.

- 1 Select **Coding Setup > Synonym Lists**.

The Synonym Lists page appears.

- 2 Select a synonym list.

- 3 Select **Actions > Upgrade**.

The Upgrade Synonym List dialog box appears. For a description of the fields on this page, see *Upgrade Synonym List In Process page* (on page 266).

- 4 In the **New** column, specify the following:

- **Synonym List**—Unique name for the new synonym list.
- **Parent Synonym List**—Name for the upgraded parent synonym list, if the synonym list to upgrade to is inherited.
- **Dictionary Version**—Dictionary version for the new synonym list.

- 5 To autoreconcile the capitalization in different WHO-DD dictionary versions so the Preferred Term for coded verbatims exactly matches the capitalization of the Preferred Name for the WHO-DD format, select **Auto Reconcile Term Capitalization Differences**.

- 6 Click **OK**.

The Upgrade Synonym List In Process page appears.

After the upgrade, the status of the synonym list changes to **Update—Complete**.

- 7 To view the status of the synonyms that were upgraded, run the Synonym Reconciliation Report.

For more information, see *Running the Synonym Reconciliation Report* (on page 116).

- 8 Do one of the following:

- a If there are synonym differences between the dictionary versions, reconcile the synonyms.

For more information, see *Reconciling a synonym* (on page 115).

- b If there are no synonym differences between the dictionaries, save the upgraded list.

For more information, see *Saving synonym changes to the database* (on page 115).

Viewing the status of a synonym list upgrade

- 1 Select **Coding Setup > Synonym Lists**.

The Synonym Lists page appears.

- 2 Select **Actions > View Upgrade Process**.

The Upgrade Synonym List In Process page appears. For a description of the fields on this page, see *Upgrade Synonym List In Process page* (on page 266).

Canceling a synonym list upgrade

- 1 Select **Coding Setup > Synonym Lists**.
The Synonym Lists page appears.
- 2 Select **Actions > View Upgrade Process**.
The Upgrade Synonym List In Process page appears.
- 3 Select a synonym list.
- 4 Select **Actions > Cancel**.
A confirmation dialog box appears.
- 5 Click **OK**.

Rerunning a synonym list upgrade

Use this procedure to rerun a synonym list upgrade with a status of **Failed**.

- 1 Select **Coding Setup > Synonym Lists**.
The Synonym Lists page appears.
- 2 Select **Actions > View Upgrade Process**.
The Upgrade Synonym List In Process page appears.
- 3 Select a synonym list upgrade.
- 4 Select **Actions > Rerun**.
A confirmation dialog box appears.
- 5 Click **OK**.

Synonym reconciliation management

To continue to use a synonym after you have upgraded the related synonym list to a new dictionary version, you must verify that both the associated code and term exist in the new dictionary version.

If the code and term do not exist, or if the code still exists but the term has changed in the new dictionary version, you must reassociate the synonym to a new code and term to reconcile any differences.

The Central Coding application automatically reassociates synonyms with current terms for MedDRA dictionary versions. For other dictionary types, you must manually select a new term and code for the synonym on the Reconcile Synonyms page.

You can choose whether to:

- Reconcile or delete each synonym in the list individually.
- Reconcile all the synonyms from the list at one time.

The Central Coding application deletes synonyms that are not reconciled from the list.

Reconciling a synonym

Use this procedure to reconcile a synonym whose code still exists, but the term associated with the code has changed in the new dictionary version. You can select a new term and code to associate with each synonym during the synonym list upgrade process.

- 1 Select **Coding Setup > Synonym Lists**.

The Synonym Lists page appears.

- 2 Select **Actions > View Upgrade Process**.

The Upgrade Synonym List In Process page appears.

- 3 Select a synonym list with a step and a status of **Reconcile—NotStarted** or **Reconcile—InProcess**.

- 4 Click the **Reconcile** button.

The Reconcile Synonyms page appears. For a description of the fields on this page, see *Reconcile Synonyms page* (on page 222).

- 5 Choose whether to recode the synonym or delete it.

- To interactively code the synonym in the coding browser, click the **Code** link in the **New Term** column.

The coded synonym appears in the **New Term** column.

- To delete the synonym, select the **Delete** in the **Action** column.

- 6 Click the **Approve All** button.

A confirmation dialog box appears.

- 7 Click **OK**.

The Upgrade Synonym List In Process page reappears.

Saving synonym changes to the database

Use this procedure to save reconciled synonyms from an upgraded synonym list to the database.

You cannot undo the save action.

After you save synonym changes, the Central Coding application generates the final version of the Synonym Reconciliation Report.

- 1 Select **Coding Setup > Synonym Lists**.

The Synonym Lists page appears.

- 2 Select **Actions > View Upgrade Process**.

The Upgrade Synonym List In Process page appears. For a description of the fields on this page, see *Upgrade Synonym List In Process page* (on page 266).

- 3 Select a synonym list.

- 4 Click the **Update** button.

A confirmation dialog box appears.

- 5 Click **OK**.

Running the Synonym Reconciliation Report

The Synonym Reconciliation Report records the status of the synonym upgrade and reconciliation process.

You can run the report at any time after the synonym upgrade and during or after the reconciliation process. The Central Coding application generates the final version of the report when you update the synonym list.

Synonyms that are automatically reassocated appear in the Synonym Reconciliation report.

Only the current version of the report is saved. However, you can keep a history of the report by saving all the versions from the Document Viewer page.

- 1 Select **Coding Setup > Synonym Lists**.

The Synonym Lists page appears.

- 2 Select **Actions > View Upgrade Process**.

The Upgrade Synonym List In Process page appears.

- 3 Select a synonym list with a step and status of **Reconcile—Not Started**, **Reconcile—In Process**, or **Update—Not Started**.

- 4 Click the **Generate Report** button.

When the report is complete, the **Results Exist**  icon appears in the **Report** column.

- 5 Click the **Results Exist**  icon.

The Document Viewer page appears and displays the report in Rich Text Format (RTF).

Coding definition upgrade management

The Central Coding application codes requests to the dictionary type and version specified by the coding definition in use. To code requests against a new dictionary version, you must upgrade an existing coding definition and associate it with:

- The new dictionary version.
- An upgraded synonym list.
- New or upgraded assignment rules.

For more information, see *Editing the details of a coding definition* (on page 78).

If you use auto-suggestions, after you upgrade a coding definition, the Central Coding application:

- Validates auto-suggestions for the original coding definition.
- Copies valid auto-suggestions to the new coding definition.
- Deletes invalid auto-suggestions.

Recoding a request against an upgraded coding definition may result in different coding results based on changes to synonyms, stopwords, or coding algorithms.

Upgrading a coding definition

Use this procedure to create a new coding definition for the new dictionary version by upgrading an

existing coding definition.

After you start the upgrade process for a coding definition, you can no longer cancel impact analysis.

- 1 Select **Coding Setup > Coding Definitions**.

The Coding Definitions page appears.

- 2 Select a coding definition.

- 3 Select **Actions > Upgrade**.

The Upgrade Coding Definition dialog box appears.

- 4 In the **New** column, specify the following:

- Coding definition name
- Dictionary version
- Synonym list

- 5 Configure the assignment rules for the coding definition, based on the descriptions in *Upgrade Coding Definition dialog box* (on page 264).

- 6 Click **OK**.

- 7 Change the order in which assignment rules run so that the new assignment rules run first for the coding definition. For more information, see *Changing the order in which assignment rules run* (on page 85).

Verbatim reconciliation management

After you change the assignment rules to use a new dictionary version, the Central Coding application:

- Codes new verbatims against the new dictionary version.
- Attempts to recode the verbatims that are coded against the original dictionary version.

To recode a coded verbatim against the new dictionary version, the application attempts to autocode the verbatim against the new coding definition. It then searches the dictionary elements for which the **Return** option is selected on the Element Configuration page and compares the original coding result at the following levels:

- Code
- Term
- Additional information
- Primary dictionary path (if the dictionary type supports the concept of primary path)

The comparison is case-insensitive.

If the original coding result and the new autocode result are the same, the verbatim receives the **NoChange** status.

If the application finds a different term for the verbatim in the new dictionary version, and the term corresponds to a dictionary level that does not require reconciliation on the Element Configuration page, the verbatim receives the **AutoReconciled** status.

If the application does not find a match for the original coding result in the new dictionary version,

and is unable to determine a new coding result based on Impact Analysis options, the verbatim receives the **AutoAssign** status.

If the application does not find a match for the original coding result in the new dictionary version, and is unable to determine a new coding result regardless of Impact Analysis options, the verbatim receives the **NeedsReconciliation** status.

You must manually reconcile each verbatim with **AutoAssign** or **NeedsReconciliation** status.

Reconciling a verbatim

The Central Coding application applies the default reconciliation option to any verbatims that you do not explicitly reconcile. For more information, see *Setting the default reconciliation options for verbatims* (on page 106).

- 1 Select **Coding Setup > Impact Analysis**.

The In Process page appears.

- 2 Select a coding definition upgrade with a step and status of **Reconcile—Not Started** or **Reconcile—In Process**.
- 3 Click the **Reconcile** button.

The Reconcile Verbatims page appears. For a description of the fields on this page, see *Reconcile Verbatims page* (on page 224).

- 4 Reconcile each verbatim:

- To accept the original coding, select the value in the **Original Code and Term** column.

The selection is disabled if the original term or path no longer exists in the new dictionary.

- To accept the new coding, select the value in the **New Code and Term** column.

If the Central Coding application was able to autocode the verbatim using the new coding definition during impact analysis, a code and term appear.

- To interactively code the verbatim and its context items, click the **Code** link in the **New Code and Term** column.

The Coding Browser dialog box appears.

- To return the verbatim to the coder's queue to be recoded, select **Uncode**.

The Accept Uncode column appears only if **Allow Uncode** is selected on the System Configuration page. For more information, see *System Configuration page* (on page 255).

- 5 To indicate that all the decisions for the verbatim are complete, select **Done**.
- 6 To save your reconciliation selections, click the **Approve All** button.

A confirmation dialog box appears.

- 7 Click **OK**.

The In Process page appears.

The Central Coding application applies your reconciliation selections only after you save the changes for the verbatims to the database.

Saving verbatim changes to the database

Use this procedure to save the changes for the verbatims that you approved during the reconciliation

process.

You cannot undo the save action.

- 1 Select **Coding Setup > Impact Analysis**.

The In Process page appears.

- 2 Select a coding definition upgrade with a step and status of **Update—Not Started**.

- 3 Click the **Update** button.

A confirmation dialog box appears.

- 4 Click **OK**.

The Central Coding application saves the changes and generates the final version of the Impact Analysis Report.

Performing post-analysis tasks

Checklist—Performing post-impact analysis tasks

<input checked="" type="checkbox"/> Step	Task	For more information, see
<input type="checkbox"/> 1	Re-enable the Get Requests and Return codes jobs for each study related to the upgraded dictionary.	<i>Running a nonscheduled job for a study</i> (on page 135)
<input type="checkbox"/> 2	Verify that new coding requests use the correct coding definition and dictionary version.	<i>Viewing the details of a coding request</i> (on page 95)
<input type="checkbox"/> 3	Run the Impact Analysis Report.	<i>Generating the Impact Analysis report</i> (on page 120)
<input type="checkbox"/> 4	Export impact analysis data.	<i>Exporting impact analysis data</i> (on page 121)
<input type="checkbox"/> 5	Rerun impact analysis.	<i>Rerunning impact analysis</i> (on page 121).

Running the Impact Analysis Report

The Impact Analysis report records the status of the impact analysis and verbatim reconciliation process.

You can run the report at any time after you run impact analysis and during or after the verbatim reconciliation process. The Central Coding application runs the final version of the report when you save the changes for the verbatims to the database.

Only the current version of the report is saved. However, you can keep a history of the report by saving all the versions from the Document Viewer page. For more information, see *Viewing the results of a report* (on page 35).

- 1 Select **Coding Setup > Impact Analysis**.

The In Process page appears.

- 2 Select a coding definition upgrade with a step and status of **Reconcile—Not Started**, **Reconcile—In Process**, or **Update—Not Started**.

- 3 Click the **Generate Report** button.

When the report is complete, the **Results Exist**  icon appears in the **Report** column.

- 4 Click the **Results Exist**  icon.

The Document Viewer page appears and displays the report in Rich Text Format (RTF).

Exporting impact analysis data

Use this procedure to export reconciled data to an external application such as Microsoft Excel spreadsheet software in Comma-Separated Value (CSV) file format. The information that is exported is available also in the Impact Analysis Report.

- 1 Select **Coding Setup > Impact Analysis**.

The In Process page appears.

- 2 Select a coding definition upgrade.
- 3 Click the **Export** button.

The Document Viewer page appears with the Windows File Download dialog box.

- 4 Open or save the file.

Rerunning impact analysis

Use this procedure to rerun impact analysis if the process has a status of **Failed**.

- 1 Select **Coding Setup > Impact Analysis**.

The In Process page appears.

- 2 Select a coding definition upgrade.
- 3 Select **Actions > Rerun**.

CHAPTER 18

Adapters—InForm integration only

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About adapters

An adapter is a web service interface that supports the secure transfer of data between the InForm and the Central Coding applications. You can set up multiple adapters and associate them with one or more studies for each instance of the Central Coding application.

Adding an adapter

- 1 Select **Admin > System > Adapters**.
The Adapters page appears.
- 2 Click the **Add** button.
The New Adapter page appears.
- 3 Complete the information on the page using the descriptions in *New Adapter/[Adapter Name] page* (on page 192).
- 4 Click the **Save** button.

Editing adapter information

- 1 Select **Admin > System > Adapters**.
The Adapters page appears.
- 2 Click the **Name** link for an adapter.
The [Adapter Name] page appears.
- 3 Edit the information on the page using the descriptions in *[Adapter Name] page* (on page 192).

Deleting an adapter

You can delete an adapter only if it is not associated with a study.

- 1 Select **Admin > System > Adapters**.
The Adapters page appears.
- 2 Select an adapter.
- 3 Click the **Delete** button.

CHAPTER 19

Study information—InForm integration only

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About study information

Each InForm study must be associated with an InForm adapter.

Adding a study from the InForm application

- 1 Select **Admin > Management > Studies**.
The Study Information page appears.
- 2 Click the **New** button.
The New Study Information page appears.
- 3 Complete the information on the page using the descriptions in *New Study Information page/[Study Name] Study Information page—Edit* (on page 197).
- 4 Click the **Save** button.

Editing study information

- 1 Select **Admin > Management > Studies**.
The Study Information page appears. For a description of the fields on this page, see *Study Information* (on page 247).
- 2 Select a study.
- 3 Click the **Edit** button.
The [Study Name] Study Information page appears.
- 4 Edit the information using the descriptions in *[Study Name] Study Information page—Edit* (on page 197).
- 5 Click the **Save** button.

Resetting the InForm Adapter bookmark

The bookmark attribute is an index number that identifies the last verbatim that the Central Coding application received from the InForm Adapter cache. This number ensures that, when the Get Requests job runs, the Central Coding application retrieves only verbatims that it did not previously obtain.

If coding inconsistencies exist between Central Coding and InForm, you can manually reset the bookmark attribute for the InForm Adapter application in Central Coding. This action retrieves all uncoded verbatims again from the InForm application. For studies that contain many verbatims, the Get Requests job may run for a longer time.

Only the verbatims that are updated as a result of the retrieval action change their status in the Central Coding application.

Verbatims that are already in **Delivered** state receive the **Completed** status. As a result, the Central Coding application can return them again to the InForm application.

- 1 Select **Admin > Management > Studies**.

- The Study Information page appears.
- 2 Select a study.
 - 3 Select **Actions > Reset**.

Study locks management

You lock a study in the Central Coding application to prepare the study for decommissioning. Locking a study prevents coders and approvers from:

- Viewing the associated requests on the Coding Requests and Approvals pages.
- Propagating the associated coded values, approvals, disapprovals, and cleared codes.
- Manually recoding the associated verbatims against a new dictionary version.
- Editing study data while the study is locked in the InForm application.

On the All Requests page, only administrators can view the requests associated with the study.

Locking and unlocking a study

- 1 Select **Admin > Management > Studies**.

The Study Information page appears.

- 2 Select a study.
- 3 Click the **Edit** button.

The [Study Name] Study Information page appears. For a description of the fields on this page, see *[Study Name] Study Information page—Edit* (on page 197).

- 4 To lock the study, select **Study Locked**.

or

To unlock the study, deselect **Study Locked**.

- 5 Click the **Save** button.

Decommissioning a study

You decommission a completed study to archive its coding data into separate database tables.

You cannot undo the decommissioning action.

- 1 Select **Admin > Management > Studies**.

The Study Information page appears.

- 2 Select a study.
- 3 Select **Actions > Decommission a Study**.

Note: If the job scheduler stops while the associated study is being decommissioned, restart the job schedule and rerun the decommissioning process.

A confirmation dialog box appears.

- 4 Click **OK**.

Study deletion management

For a selected study, you can remove:

- Only study information.
- Associated requests, data, and audit records as well as study information.

Typically, you delete study information and associated data only for UAT studies. To delete studies other than UAT studies, you might need to change the Delete Study Mask setting on the System Configuration page.

You can delete a study only when no jobs are running for the study.

The following items are not deleted:

- Assignment rules that refer to the study.
- Coding definitions that were assigned to the study.
- Reports generated while the study was in the database.
- The adapter, when used by more than one study.

Deleting only study information

- 1 Select **Admin > Management > Studies**.
The Study Information page appears.
- 2 Select one or more studies.
- 3 Click the **Delete Study Information** button.

Deleting study information and associated data

- 1 Select **Admin > Management > Studies**.
The Study Information page appears.
- 2 Select a study.
- 3 Select **Actions > Delete Study and All Data**.
A confirmation dialog box appears.
- 4 Click **OK**.

About study groups

A study group can organize studies with the same auto close and auto query settings into a subset. CROs use study groups to manage studies for individual customers.

You create study groups and assign studies to each group from the Study Groups page. Each study must belong to a study group. The Central Coding application assigns new studies to a default study group called System.

Creating a study group

- 1 Select **Admin > Management > Study Groups**.
The Study Group List page appears.
- 2 Click the **Add** button.
The Study Group Detail page appears.
- 3 In the **Name** field, enter a name for the new group.
- 4 Click **Save**.

Modifying a study group

- 1 Select **Admin > Management > Study Groups**.
The Study Group List page appears.
- 2 Select a study group.
- 3 Click the **Edit** button.
The Study Group Detail page appears.
- 4 In the **Name** field, edit the name value.
- 5 Deselect **Allow Auto Query By Default** to prevent the Central Coding application from adding the verbatims from the studies of the selected study group to the auto query list. You must manually create queries for each verbatim in the studies of the selected study group.
The **Add to Auto Query List** option no longer appears in the Create Query dialog box for users with the right to create queries.
- 6 Deselect **Allow Auto Close Query By Default** to prevent the Central Coding application from closing a query after the verbatim is successfully coded and approved, or deleted from the studies of the selected study group.
The **Auto Close Query Upon Coding Complete** option no longer appears for the verbatim when a user with the right to create queries selects **Auto Close Query By Default** in the Create Query dialog box.
- 7 Click **Save**.

Deleting a study group

You cannot delete a study group that is associated with one or more studies.

- 1 Select **Admin > Management > Study Groups**.

The Study Group List page appears.

- 2 Select a study group.
- 3 Click **Delete**.

Adding a study to a study group

- 1 Select **Admin > Management > Studies**.

The Study Information page appears.

- 2 Select a study.
- 3 Click the **Edit** button.

The [Study Name] Study Information page appears.

- 4 In the **Study Group** field, select a study group.
- 5 Click the **Save** button.

CHAPTER 20

Job schedules—InForm integration only

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About job schedules

A job is a mechanism that the Central Coding application uses to get data from, and return data to the InForm application.

For each study, the Central Coding application runs the following types of jobs:

- **Get Requests job**—Retrieves verbatims and associated context items from the InForm application.
- **Exchange Query Updates job**—Sends queries to the InForm application for review by an InForm application user. The job runs after each iteration of the Get Requests job and synchronizes query data for verbatims in the Central Coding and InForm applications.

Note: Before the Exchange Query Updates job can run, a Central Coding application administrator must enter the username of an InForm application user with rights to create and update queries on the System Configuration page or the Study Information page for the study. For more information, *Setting system configuration options for queries* (on page 139) or *Editing study information* (on page 126).

- **Return Codes job**—Returns codes and approval details to the InForm application.

Jobs of the same type run serially on the adapter; each job starts as soon as the preceding job completes.

The Central Coding application runs the jobs for the studies associated with an adapter according to a user-defined timetable called job schedule.

The schedule works only if the Central Coding application is configured to work with job schedules for your organization.

Job schedules can be:

- **Basic**—Based on days of the week and time of day.
- **Advanced**—Based on months, days of the week, and time of day.

There are no default timetables for job schedules.

The Central Coding application includes the following default types of job schedule:

- **Get Requests job schedule**—Specifies when to run the Get Requests job to retrieve coding requests from the InForm application. After the Get Requests job is complete, the Central Coding application also runs the Exchange Query Updates job to synchronize query data.
- **Return Codes job schedule**—Specifies when to run the Return Codes job to return coded requests and approval details to the InForm application.

Each adapter has one Get Requests and one Return Codes job schedule. The job queue for a job schedule runs synchronously with the ASAP (nonscheduled) job queues for the adapter.

Checklist: Configuring your system to work with job schedules

<input checked="" type="checkbox"/>	Step	Task	For more information, see
<input type="checkbox"/>	1	Set up adapters.	<i>Adding an adapter</i> (on page 124).
<input type="checkbox"/>	2	Define job schedules for each adapter. There are no default timetables for job schedules.	<i>Creating a job schedule for an adapter</i> (on page 133).
<input type="checkbox"/>	3	Add studies to the job schedule.	<i>Adding a study to a job schedule</i> (on page 134).

Creating a job schedule for an adapter

- 1 Select **Admin > System > Adapters**.

The Adapters page appears.

- 2 Click the **Get Requests** or the **Return Codes** () icon for an adapter.

Note: If a schedule already exists for the adapter, the icon appears blue (.

The Schedule [Adapter Name] page appears.

- 3 Create a schedule.

- To create a schedule based on days of the week and time of day, complete the information on the page using the descriptions in *Schedule [Adapter Name]—Basic* (on page 240).
- To create a schedule based on months, days of the week, and time of day:

- a Click **Advanced**.

The Schedule [Adapter Name]—Advanced page appears.

- b Complete the information on the page using the descriptions in *Schedule [Adapter Name]—Advanced* (on page 237).

- 4 Click **Save**.

Clearing a job schedule for an adapter

After you clear the job schedule, for the Get Requests or the Return Codes jobs to run automatically for the adapter, you must create the job schedule again.

Clearing return codes removes the codes and approval details in the Central Coding application. This action does not clear the codes and approval details in the InForm application.

- 1 Select **Admin > System > Adapters**.

The Adapters page appears. For a description of the fields on this page, see *Adapters page* (on page 149).

- 2 Select an adapter.

- 3 Select **Actions > Clear Get Verbatims**.
- or
- 3 Select **Actions > Clear Return Codes**.

Adding a study to a job schedule

- 1 Select **Admin > Management > Studies**.
The Study Information page appears.
- 2 Select **Get Requests** or **Return Codes** for each study to add to the corresponding job schedule.

Removing a study from a job schedule

When you remove a study from a job schedule, the Central Coding application no longer runs the jobs for the study.

- 1 Select **Admin > Management > Studies**.
The Study Information page appears.
- 2 Deselect **Get Requests** or **Return Codes** for each study to remove from the corresponding job schedule.

About nonscheduled jobs

You can run the Get Requests and Return Codes jobs at nonscheduled times to complete the setup for a new adapter or to get coding requests from the InForm application for studies that have a large amount of uncoded data. Manually running the jobs at an off-peak time allows the data to be transferred without having an impact on performance. After the coding is up to date, you can add the adapter to the job schedules for normal request processing.

The Central Coding application creates a separate job queue to transfer the data for each job. These queues, called ASAP queues, run synchronously with the scheduled Get Requests and Return Codes job queues for each adapter.

You cannot run multiple nonscheduled jobs for the same study at the same time. Running multiple, nonscheduled jobs in a short period of time can affect system performance.

Running a nonscheduled job for a study

You can run the following jobs manually:

- **Get Requests**—To retrieve coding requests from the InForm application for the studies associated with an adapter.
- **Return Codes**—To return coded requests to the InForm application for the studies associated with an adapter.


Before you run a nonscheduled job, Oracle recommends that you organize assignment rules so that the rules most likely to match the incoming requests appear first on the Assignment Rules page. Assignment rules run in the order they appear on the Assignment Rules page. For more information, see *Changing the order in which assignment rules run* (on page 85).

- 1 Select **Admin > Management > Studies**.

The Study Information page appears. For a description of the fields on this page, see *Study Information page* (on page 247).

- 2 Click the **Get Requests** or the **Return Codes** ( icon for a study.

The Central Coding application starts the job.

- 3 To view the results of a job, click the **Log** ( icon).

CHAPTER 21

Queries—InForm integration only

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About queries in InForm

Queries and query statuses appear in both the Central Coding and the InForm applications, and both Central Coding and InForm users can view and modify them.

Queries that are created in the Central Coding application appear in the InForm application as generated by an InForm application user with query rights. A Central Coding system administrator defines this user on the System Configuration page or the Study Information page for the study. For more information, see *Setting system configuration options for queries* (on page 139) or *Editing study information* (on page 126).

The Central Coding application sends query information to the InForm application for review by an InForm site user in a scheduled job called Exchange Query Updates. This job runs after each iteration of the Get Requests job and synchronizes query data in the InForm and the Central Coding applications each time it runs. For more information, see *About job schedules* (on page 132).

An InForm query created in the Central Coding application can be addressed in the InForm application in the following ways:

- An InForm site user modifies the verbatim associated with the query and marks the query as **Answered**.
- An InForm site user marks a query as **Answered** and states that the original value is correct.
- An InForm user deletes the verbatim.
- An InForm sponsor user closes the query.

Note: This is not the preferred way to close queries. A query created by a coder should be closed in the Central Coding application.

Checklist: Configuring your system to work with queries

<input checked="" type="checkbox"/> Step	Task	For more information, see
<input type="checkbox"/> 1	Assign roles and rights to users who work with queries.	<i>Default roles</i> (on page 276). <i>Default rights</i> (on page 280). <i>Required rights for working with queries</i> (on page 139).
<input type="checkbox"/> 2	Schedule jobs for each study. The Get Requests job schedule determines when query data is synchronized in the InForm and Central Coding applications.	<i>Adding a study to a job schedule</i> (on page 134)
<input type="checkbox"/> 3	Assign studies to study groups. Study group settings determine auto close and auto query settings for queries.	<i>About study groups</i> (on page 129). <i>Modifying a study group</i> (on page 129).

<input checked="" type="checkbox"/>	Step	Task	For more information, see
<input type="checkbox"/>	4	Set system configuration options for queries.	<i>Setting system configuration options for queries</i> (on page 139).
<input type="checkbox"/>	5	Create a list of standard query reasons.	<i>Standard query reasons</i> (on page 140).
<input type="checkbox"/>	6	Configure auto query and auto close settings for studies.	<i>Creating a study group</i> (on page 129). <i>About auto queries</i> (on page 142). <i>Setting system configuration options for auto queries</i> (on page 142).

Required rights for working with queries

Right	Category	Description
Force Close Query	Approval	Allows you to close a query in any state.
Manage Auto Queries	Approval	Allows you to view, edit, and delete auto queries.
Manage Query Standard Reasons	Approval	Allows you to add and edit the reasons that appear in the Reason drop-down list when a user creates, closes, or deletes a query.
Reissue Query	Approval	Allows you to reissue an answered query in the Open or Candidate state.
Issue Candidate Query	Coding	Allows you to create a query in the Candidate state. A limited group of coders and approvers generally have this right.
Add Auto Query	Coding	Add a verbatim query entry to the auto query list.
Issue Open Query	Coding	Allows you to create a query in the Open state.
Review Query Listing	Coding	Allows you to navigate to the Queries page.

Setting system configuration options for queries

- 1 Select **Admin > System > System Configuration**.
The System Configuration page appears.
- 2 Click the **Edit** button.
- 3 Edit the information on the page using the descriptions in *System Configuration—Query Management Options page* (on page 255).
- 4 Click the **Save** button.

Standard query reasons

When you create, close, reissue, or delete a query in the Central Coding application, you must specify a reason. You can create a list of frequently used reasons and specify a default reason to appear first in the list.

The Central Coding application includes the following standard query reasons.

Action type	Reasons
Create	<ul style="list-style-type: none"> • Make verbatim more specific. • Missing context item(s). • Verbatim misspelled.
Close	<ul style="list-style-type: none"> • Response satisfies query.
Reissue	<ul style="list-style-type: none"> • Response does not satisfy query.
Delete	<ul style="list-style-type: none"> • Query is not valid anymore.

Standard query reasons:

- Are visible for each study and study group.
- Appear both in the InForm application and in the Reason drop-down list in query dialog boxes in the Central Coding application.

Adding a standard reason for a query action

- 1 Select **Admin > System > Query Standard Reasons**.

The Query Standard Reason List page appears. For a description of the fields on this page, see *Query Standard Reason List page* (on page 220).

- 2 To view the existing standard reasons for a specific query action, select the action type in the **Action Type** drop-down list.
- 3 To indicate which reason appears first in the **Reason** drop-down list, select **Set as Default Reason**.
- 4 Click the **Add** button.
The Add [Action Type] Standard Reason page appears.
- 5 In the **Standard Reason** text box, enter the text for the reason.
- 6 Click **Save**.

Closing a query

If the auto close functionality is enabled, a query is closed when the verbatim is successfully coded and approved. For more information about the auto close feature, see *Setting system configuration options for auto queries* (on page 142).


You can manually close a query in the Central Coding application if it is in **Answered** state and the verbatim can be coded. Users with Force Query right can close a query in any state.

- 1 Select **Queries**.

The Queries page appears.

- 2 Select a query.
- 3 Click the **Close Query** button.

The Close Query dialog box appears. For a description of the fields on this page, see *Close Query dialog box* (on page 165).

- 4 Select a reason from the **Reason** drop-down list or click **Other** and specify the reason in the Other text box.
 - To copy the reason from the **Reason** drop-down list, click the **Copy**  icon.
 - To add the reason to the standard list that appears in the **Reason** drop-down list, if you have the Manage Standard Reasons right, click **Add as standard reason**.
- 5 Click **OK**.

About auto queries

You can configure the Central Coding application to create or to close queries under certain conditions, for specified study groups, using the **Allow Auto Query by Default** and **Auto Close Query by Default study group** configuration settings.

When you use auto queries, if a query is marked as **Answered** and the associated verbatim is either coded and approved, or deleted, the application closes the query. Also, if you create a query on a verbatim for a study group and select **Add to auto query list**, the application associates a query to that verbatim every time the verbatim is introduced to the study group.

CROs who manage several customers can use the study group functionality to configure auto query options for each customer's studies.

Checklist: Configuring your system to work with auto queries

<input checked="" type="checkbox"/> Step	Task	For more information, see
<input type="checkbox"/> 1	Create a study group or modify the default system study group.	<i>About study groups</i> (on page 129). <i>Creating a study group</i> (on page 129). <i>Modifying a study group</i> (on page 129).
<input type="checkbox"/> 2	Add studies to the study group. Associate the studies for which you intend to assign the same auto query and auto close settings.	<i>Adding a study to a study group</i> (on page 130).
<input type="checkbox"/> 3	Configure the auto query and auto close settings for the study group. The settings apply to each study in the group.	<i>Setting system configuration options for auto queries</i> (on page 142).

Setting system configuration options for auto queries

- 1 Select **Admin > Management > Study Groups**.

The Study Group List page appears.

- 2 Select a study group.

- 3 Click the **Edit** button.

The Study Group Detail page appears.

- 4 Select or deselect the following options:

- **Allow Auto Query By Default**

When selected, the Add to auto query list checkbox appears in the Create Query dialog box. After a coder or approver associates a query with a verbatim in a study that belongs to the

selected study group, the Central Coding application duplicates the query and applies it to verbatims that are subsequently entered against the studies associated with the study group.

When deselected, a coder or approver must manually create queries for the verbatims in the selected study group.

- **Allow Auto Close Query By Default**

When selected, the Auto-close query upon coding complete checkbox appears in the Create Query dialog box. After a coder or approver associates a query with a verbatim in a study that belongs to the selected study group, the Central Coding application closes the query when the associated verbatim is successfully coded and approved, or deleted.

When deselected, a coder or approver must manually close queries for the verbatims in the selected study group.

- 5 Click **Save**.

Auto query list

Use the Manage Auto Query view of the Auto Query List page to view or remove associated verbatims and auto query text from a specific study group.

Removing a verbatim from the auto query list

- 1 Select **Queries**.
The Queries page appears.
- 2 Click the **Manage Auto Query** button.
The Auto Query List page appears.
- 3 Select a study group from the **Study Group** drop-down list to view associated queries.
- 4 Select a verbatim.
- 5 Click the **Delete Auto Query** button.
A confirmation dialog box appears.
- 6 Click **OK**.

APPENDIX A

Page-level help reference

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Adapters page

The help for this page includes descriptions for core fields, actions, and buttons only.

Fields

Adapters page	
Field	Description
Get Requests Schedule	<p>Opens the Get Requests job schedule for an associated adapter.</p> <p>The Schedule (📅) icon opens the Schedule [Adapter Name]—Basic page, where you can create a schedule for running the Get Requests jobs for the associated adapter. The icon is colored when a schedule exists (📅).</p>
Return Codes Schedule	<p>Opens the Return Codes job schedule for an associated adapter.</p> <p>The Schedule (📅) icon opens the Schedule [Adapter Name]—Basic page, where you can create a schedule for running the Return Codes jobs for the associated adapter. The icon is colored when a schedule exists (📅).</p>
Adapter Type	The product type that sends the requests.

Actions

Adapters page		
Action	Shortcut	Description
Add	Ctrl+Shift+N	Opens the New Adapter page, where you can add information about an InForm Adapter to the Central Coding application.
Clear Get Verbatims		Clears the Get Requests job schedule for the selected adapter.
Clear Return Codes		Clears the Return Codes job schedule for the selected adapter.

Buttons

Adapters page		
Button	Shortcut	Description
Add	Ctrl+Shift+N	Opens the New Adapter page, where you can add information about an InForm Adapter to the Central Coding application.

[Algorithm Name] page

The help for this page includes descriptions for core fields, actions, and buttons only.

Fields

[Algorithm Name] page	
Field	Description
Order	The order that the application runs the steps in the algorithm.

Actions

[Algorithm Name] page		
Action	Shortcut	Description
Add	Ctrl+Shift+N	Opens the Add Actions to Algorithm page, where you can add and manage the steps in the algorithm. This action is available only in Edit mode.
Remove	Ctrl+Shift+Del	Deletes the selected algorithm step from the algorithm. This action is available only in Edit mode.

Buttons

[Algorithm Name] page	
Action	Description
Add	Opens the Add Actions to Algorithm page, where you can add and manage the steps in the algorithm. This button is available only in Edit mode.
Remove	Deletes the selected algorithm step from the algorithm. This button is available only in Edit mode.

Algorithms page

The help for this page includes descriptions for core fields, actions, and buttons only.

Fields

Algorithms page	
Field	Description
Status	The state of the algorithm. An algorithm with an Active status is available for use by a coding definition. An algorithm with an Inactive status is not available for use by a coding definition.

Actions


Algorithms page		
Action	Shortcut	Description
Manage	Ctrl+Shift+M	Opens the [Algorithm Name] page, where you can reorder, add, or remove steps in a selected algorithm.

All Requests page

Some of the information that appears on this page is configurable by an administrator through the element configuration options. The following table entries represent the default configuration.

The help for this page includes descriptions for core fields, actions, and buttons only.

Fields

All Requests page	
Field	Description
Verbatim field	<p>The verbatim to search for. Searches are <i>case-insensitive</i>. The search supports the special characters *, %, ?, and _.</p> <p>The search text field can be any text string and can contain wildcard characters to facilitate matching when the exact text is not known. The percent sign (%) or asterisk (*) matches any sequence of characters; the question mark (?) or underscore (_) matches any single character.</p>
Subject ID	The source application identifier for the subject associated with the coding request.
A	<p>The autocode status.</p> <ul style="list-style-type: none"> • Autocoded ()—The request was autocoded. • Blank—The request was not autocoded.
Notes	<p>Indicates that there is a note associated with the coding request.</p> <p>Pointing to the Note icon displays the text for each entry in the note. The note entries are sorted from newest to oldest.</p>
Flag	Indicates that the coding request requires attention. A Central Coding administrator can configure the meaning of each coding flag.
Verbatim header	<p>The original reported text that describes the adverse event, disease, drug, or other item to be coded. This information comes from the source application.</p> <p>In a self-hosted environment, the first 25 characters of the context items (Indication and Route of Administration) associated with the verbatim appear below the verbatim if the Display Context Items on Coding Requests and Approvals pages option is selected on the System Configuration page.</p>
Code	<p>The classification level code value. Opens the View Full Coding dialog box, where you can view the full coding details for a coded item. The details include the dictionary name and version, the coded term and value, and the level of the dictionary hierarchy where the match was found.</p> <p>This link appears only if the request was coded.</p>
Lowest and Highest Level Term	The terms associated with the levels of the dictionary. The terms are displayed on the page based on the options selected on the Element Configuration page.

All Requests page	
Field	Description
Site	A unique identifier for the subject site. This information comes from the source application.
Study	The name of the study. The name is an active link if your environment is integrated with the InForm application. The link opens the InForm application page for the study.
Form Name	RefName of the form associated with the request. This information comes from the source application.

Actions

All Requests page	
Action	Description
Retry Delivery for All	Changes the delivery status for requests with failed deliveries to the source application to Completed, awaiting delivery. This allows the requests to be picked up by the job queue so that they can be resent to the source application. Requires the Retry Delivery right.

Approvals page

Some of the information that appears on this page is configurable by an administrator through the element configuration options. The following table entries represent the default configuration.

The help for this page includes descriptions for core fields, actions, and buttons only.

Fields

Approvals page	
Field	Description
Verbatim field	<p>The verbatim to search for. Searches are <i>case-insensitive</i>. The search supports the special characters *, %, ?, and _.</p> <p>The search text field can be any text string and can contain wildcard characters to facilitate matching when the exact text is not known. The percent sign (%) or asterisk (*) matches any sequence of characters; the question mark (?) or underscore (_) matches any single character.</p>
Subject ID field	The source application identifier for the subject associated with the coding request.
Notes	<p>Indicates that there is a note associated with the coding request.</p> <p>Pointing to the Note icon displays the text for each entry in the note. The note entries are sorted from newest to oldest.</p>
Flag icon	Indicates that the coding request requires attention. A Central Coding administrator can configure the meaning of each coding flag.
Verbatim header	<p>The original reported text that describes the adverse event, disease, drug, or other item to be coded. This information comes from the source application.</p> <p>Verbatims that are updated in the source application after they are coded in the Central Coding application are highlighted in yellow. The highlight is removed when the request status is Completed, delivered.</p> <p>In a self-hosted environment, the first 25 characters of the context items (Indication and Route of Administration) associated with the verbatim appear below the verbatim if the Display Context Items on Coding Requests and Approvals pages option is selected on the System Configuration page.</p>
Code	<p>The classification level code value. You can view the full coding details for a coded item from the View Full Coding dialog box. The details include the dictionary name and version, the coded term and value, and the level of the dictionary hierarchy where the match was found.</p> <p>The sort on this column is case-insensitive.</p>
Lowest and Highest Level Term	The terms associated with the levels of the dictionary. The terms are displayed on the page based on the options selected on the Element Configuration page.

Approvals page	
Field	Description
Site	A unique identifier for the subject site. This information comes from the source application.
Study	The name of the study. The name is an active link if your environment is integrated with the InForm application. The link opens the InForm application page for the study.
Form Name	RefName of the form associated with the request. This information comes from the source application.
Subject ID header	The source application identifier for the subject associated with the coding request. This information comes from the source application.

Actions

Approvals page		
Action	Shortcut	Description
Approve	Ctrl+Shift+A	Approve and propagate. Marks the coding approved for the selected request and for other coded requests with the same code, verbatim, coding definition, and context information. The approval propagates only to requests associated with unlocked studies.
Disapprove	Ctrl+Shift+D	Disapprove and propagate. Marks the coding disapproved for the selected request and for other coded requests with the same code, verbatim, coding definition, and context information. The disapproval propagates only to requests associated with unlocked studies. Disapproved requests are returned to the coder's queue with a coding status of Recode.
Code	Ctrl+Shift+C	Code and propagate. Opens the Coding Browser dialog box, where you can interactively code and propagate the value for the selected verbatim. The application propagates the selected code value to other uncoded requests with the same verbatim, coding definition, and context information. The coding propagates only to requests associated with unlocked studies.



Approvals page		
Action	Shortcut	Description
Clear Code		Removes the code value only for the selected verbatim. Clearing the code values in the Central Coding application clears the corresponding code values in the source application.

Buttons

Approvals page		
Button	Shortcut	Description
Approve	Ctrl+Shift+A	<p>Approve and propagate. Marks the coding approved for the selected request and for other coded requests with the same code, verbatim, coding definition, and context information.</p> <p>The approval propagates only to requests associated with unlocked studies.</p>
Disapprove	Ctrl+Shift+D	<p>Disapprove and propagate. Marks the coding disapproved for the selected request and for other coded requests with the same code, verbatim, coding definition, and context information.</p> <p>The disapproval propagates only to requests associated with unlocked studies.</p> <p>Disapproved requests are returned to the coder's queue with a coding status of Recode.</p>

Approve Query dialog box

The help for this page includes descriptions for core fields, actions, and buttons only.

Approve Query dialog box	
Field	Description
Copy ( icon)	Copies the verbatim text to the Other text box for editing.
Query State	<p>The state assigned to the query.</p> <ul style="list-style-type: none"> • Open—Visible and able to be addressed by an InForm user in the InForm application. • Candidate—Preliminary query not visible to an InForm user in the InForm application. A Central Coding administrator can assign a query to the Open or Deleted state. <p>Only users with the Issue Candidate Query right can create queries in Candidate state.</p>
Reason	Descriptive text about the reason to approve the query. A Central Coding administrator can configure the default reasons and can specify which reason appears first in the list.
Copy ( icon)	Copies the text from the Reason drop-down list to the Other text box for editing.
Add as standard reason	<p>Adds the text in the Other field to the list of standard reasons that appear in the Reason list.</p> <p>The Add as standard reason checkbox appears only for users who have the Manage Standard Reasons right.</p>
Auto close upon query complete	<p>Instructs the Central Coding application to close the query after its associated verbatim is coded and approved, or deleted.</p> <p>This option appears only if the Auto Close Query by Default feature is enabled.</p>
Add to auto query list	<p>Adds the verbatim and associated query to the Auto Query List. When an instance of the verbatim is added to the Central Coding application, the application associates the query to the verbatim.</p> <p>This option appears only if Allow Auto Query by Default is enabled.</p>

Assign Rights to Role: [Role Name] dialog box

The help for this page includes descriptions for core fields, actions, and buttons only.

Assign Rights to Role: [Role Name] dialog box	
Field	Description
Category	The type or grouping of the rights available in the system.

Assign Users to Work Team: [Work Team Name] dialog box

The help for this page includes descriptions for core fields, actions, and buttons only.

Assign Users to Work Team: [Work Team Name] dialog box— Available Users	
Field	Description
ALL	A link that resets the view to show all users.
A to Z	Links to user names that start with an indicated letter.
Username	The system login names for the users available for assignment to the work team.

Assign Users to Work Team: [Work Team Name] dialog box— Selected Users	
Field	Description
Username	The system login names for the users assigned to the work team.

Assignment Rules page

The help for this page includes descriptions for core fields, actions, and buttons only.

Assignment Rules page	
Field	Description
Order	The order that the application runs the assignment rules.
Name	The name of the assignment rule. Opens the [Assignment Rule Name] page, where you can edit the details for the assignment rule. The (!) icon indicates that the assignment rule does not have a coding definition or associated work team.

Auto Query List page

The help for this page includes descriptions for core fields, actions, and buttons only.

Fields



Auto Query List page	
Field	Description
Verbatim field	<p>The verbatim to search for. Searches are <i>case-insensitive</i>. The search supports the special characters *, %, ?, and _.</p> <p>The search text field can be any text string and can contain wildcard characters to facilitate matching when the exact text is not known. The percent sign (%) or asterisk (*) matches any sequence of characters; the question mark (?) or underscore (_) matches any single character.</p>
Verbatim header	<p>The original reported text that describes the adverse event, disease, drug, or other item to be coded.</p> <p>This information comes from the source application.</p>
Dictionary Type	The type of coding dictionary associated with the query list: MedDRA, MedDRA-J, WHO-DD, JDrug, or a custom type.
Dictionary Culture	The culture setting associated with the coding dictionary.

Buttons

Auto Query List page		
Button	Shortcut	Description
Delete Auto Query	Ctrl+Shift+D	Removes the selected verbatims from the list of verbatims for which to create queries.

Auto Suggestions page

The help for this page includes descriptions for core fields, actions, and buttons only.

Auto Suggestions page	
Field	Description
Verbatim field	<p>The verbatim for which to view available auto-suggestions.</p> <p>Searches are <i>case-insensitive</i>. The search supports the special characters *, %, ?, and _.</p> <p>The search text field can be any text string and can contain wildcard characters to facilitate matching when the exact text is not known. The percent sign (%) or asterisk (*) matches any sequence of characters; the question mark (?) or underscore (_) matches any single character.</p>
Initiate search ()	Initiates the search.
Clear verbatim and load the whole list ()	Clears the search.
Verbatim header	The original reported text that describes the adverse event, disease, drug, or other item to be coded.
Indication	<p>The disease or disorder for which the drug was taken.</p> <p>This field appears only for items associated with the WHO-DD or JDrug dictionary. If other dictionaries are defined to have context information, that information appears in this location.</p>
Route of Administration	<p>The route by which the drug was administered.</p> <p>This field appears only for items associated with the WHO-DD or JDrug dictionary. If other dictionaries are defined to have context information, that information appears in this location.</p>
Target Code	The code value for the primary autocode target.
Target Term	The coded term for the primary autocode target.
Secondary Code	The code value for the secondary autocode target.
Secondary Term	The coded term for the secondary autocode target.

Change Password dialog box

The help for this page includes descriptions for core fields, actions, and buttons only.

Change Password dialog box	
Field	Description
User Name	Your system log in name.
Old Password	The log in password you are currently using.
New Password / Confirm Password	The new log in password to use. Passwords can be from 1 to 32 characters. For security reasons, Oracle recommends using a combination of letters and numbers and a minimum of 6 characters. Passwords are case-sensitive.


Choose Source and Target Coding Definitions dialog box

The help for this page includes descriptions for core fields, actions, and buttons only.

Choose Source And Target Coding Definitions dialog box	
Field	Description
Source Coding Definition Name	The coding definition used with the original dictionary version.
Target Coding Definition Name	The coding definition used with the new dictionary version.
Auto Reconcile Terms	<p>When selected, the Central Coding application autoreconciles term changes between the original and new dictionary versions at each dictionary level. You must then manually reconcile the codes on the Reconcile Verbatims page.</p> <p>The application autoreconciles the terms in the new coding definition even if the Requires Reconciliation option is selected for an element on the Element Configuration page.</p>
Auto Reconcile Term Capitalization Differences	Autoreconciles the capitalization in different WHO-DD dictionary versions so the Preferred Term for coded verbatims exactly matches the capitalization of the Preferred Name for the WHO-DD format.

Close Query dialog box

The help for this page includes descriptions for core fields, actions, and buttons only.





Close Query dialog box	
Field	Description
Reason	Descriptive text about the reason for creating the query. A Central Coding administrator can configure the default reasons, and can specify which reason appears first in the drop-down list.
Copy () icon	Copies the text from the Reason drop-down list to the Other text box for editing.
Add as standard reason	<p>Adds the text in the Other text box to the list of standard reasons that appear in the Reason drop-down list.</p> <p>The Add as standard reason checkbox appears only for users who have the Manage Standard Reasons right.</p>

Coding Browser dialog box

The help for this page includes descriptions for core fields, actions, and buttons only.

Fields

Coding Browser dialog box	
Field	Description
Culture	A combination of attributes including language, date formats, and currency.
Verbatim	<p>The original reported text that describes the adverse event, disease, drug, or other item to be coded.</p> <p>This information comes from the source application.</p> <p>In a self-hosted environment, the first 25 characters of the context items (Indication and Route of Administration) associated with the verbatim appear below the verbatim if the Display Context Items on Coding Requests and Approvals pages option is selected on the System Configuration page.</p>
Indication	<p>The disease or disorder for which the drug was taken. This information comes from the source application.</p> <p>This field appears only for items associated with the WHO-DD or JDrug dictionary.</p>
Route of Administration	<p>The route by which the drug was administered. This information comes from the source application.</p> <p>This field appears only for items associated with the WHO-DD or JDrug dictionary.</p>
Create Query link	<p>Creates a query in the Central Coding application to be answered by an InForm user.</p> <p>This option is available only if your environment is integrated with the InForm application.</p>
Search for	<p>The text to code. This field is editable only when the browser is in Search mode.</p> <p>Searches are case-insensitive.</p>
In field	The hierarchy level of the dictionary to search. This drop-down list is active only when the browser is in Search mode.
Exclude Auto Suggestion step	<p>Indicates whether to use the Auto Suggested code value for the item. This feature applies only when an item is autocoded.</p> <p>This button is active only when the browser is in Search mode.</p>
Return All Matches	<p>Indicates whether the matched terms found appear in the browser.</p> <p>By default, the coding browser displays 200 matches. This number, and whether this option is available, is set by your administrator.</p> <p>This button is active only when the browser is in Search mode.</p>

Coding Browser dialog box	
Field	Description
Search ( icon)	Changes the coding mode to Search mode.
Browse ( icon)	Changes the coding mode to hierarchical Browse mode.
Reset tree ( icon)	Resets the hierarchy tree. This button is active only when the browser is in Browse mode.
Contains whole words only	Indicates a search for terms that contain the complete verbatim text, rather than partial text. This feature applies only for searches using the Contains button.
Use as Auto Suggestion	Indicates whether the application uses the code value you accept for new requests with the same verbatim, dictionary, coding definition, and context information. This option is selected by default. To use the auto-suggestion feature, the coding algorithm must include the Auto Suggestion step.
P icon	Indicates that the result is the primary path for the dictionary. This icon appears only for MedDRA dictionaries that support the primary path concept.
nc icon	Indicates that the coding is not current for the dictionary. This icon appears only for MedDRA dictionaries that support the currency concept.
Old Form ( icon)	Indicates that the code entry is obsolete. The name of the country where it is obsolete appears when you point to the code.
Accept link	Saves the associated code. This link appears next to each code value that the browser returns. This link appears only if the coding browser is in Search mode.
View Synonyms link	A link to the View Synonyms dialog box, where you can view the list of approved synonyms for a selected code. This link appears only if the coding browser is in Search mode and an active synonym list specified by the coding definition is in use.
Suggest Synonyms link	A link to the Suggest Synonym dialog box, where you can propose a synonym for the selected coded term. This link appears only if the coding browser is in Search mode and an active synonym list specified by the coding definition is in use.
Medicinal Product link	A link to the Medicinal Product dialog box, where you can view the Medicinal Product information for the drug. This link appears only if the coding browser is in Search mode.

Buttons

Coding Browser dialog box	
Button	Description
Auto	Runs the autocode algorithm on the text entered in the Search for field. This button is active only when the browser is in Search mode.

[Coding Definition Name] dialog box

The help for this page includes descriptions for core fields, actions, and buttons only.

[Coding Definition Name] dialog box	
Field	Description
Culture	A combination of attributes including language, date formats, and currency.
Autocode Match Level	The level in the dictionary hierarchy where the coding algorithm searches for a match when performing autocoding. This information appears only if the request was autocoded.

Coding Definitions page

The help for this page includes descriptions for core fields, actions, and buttons only.

Fields

Coding Definitions page	
Field	Description
Name	The name of the coding definition. Opens the [Coding Definition Name] page, where you can view or edit the details of the coding definition.
Comments	System-generated information about the coding definition.

Actions

Coding Definitions page		
Action	Shortcut	Description
Edit	Ctrl+Shift+E	Puts the [Coding Definition Name] page into Edit mode, where you can edit the name of the stopword list.
Upgrade	Ctrl+Shift+U	Used during impact analysis only. Opens the Upgrade Coding Definition dialog box, where you can create a coding definition that is a copy of the selected coding definition.
Rerun		Used during impact analysis only. Reruns the upgrade coding definition process. You can rerun the process only if the status is Failed.
Element Configuration		Opens the Element Configuration page, where you can specify dictionary elements that control the availability of coding features and information to users.
Reset Element Configuration		Resets the element configuration settings for the selected coding definition to the settings for its dictionary.
Manage Auto Suggestions		Opens the Auto Suggestions page, where you can view the auto-suggestions that are associated with a coding definition and specified verbatim.
Verify and Update Codes		Instructs the Central Coding application to review the codes for coded requests against a new dictionary. Changes are tracked in the audit history.

Coding Definitions page		
Action	Shortcut	Description
View Verify and Update Job Log		Opens the View Job Log page, where you can view the results of updating the codes for coded requests against a new dictionary.
Run Impact Analysis		Used during impact analysis only. Opens the Choose Source And Target Coding Definitions dialog box, where you can select two coding definitions to compare for impact analysis.
View Impact Analysis Process		Used during impact analysis only. Opens the In Process page, where you can view the status of the verbatim upgrade process, initiate the verbatim reconciliation process, generate the Impact Analysis Report, export data, and commit verbatim changes to the database.

Buttons

Coding Requests page		
Button	Shortcut	Description
Edit	Ctrl+Shift+E	Puts the [Coding Definition Name] page into Edit mode, where you can edit the name of the stopword list.

Coding Flags page

The help for this page includes descriptions for core fields, actions, and buttons only.

Coding Flags page	
Field	Field
Icon	The coding flag icon that the Central Coding administrator can define. By default, the red coding flag icon is defined as (I)nForm Query, and the green coding flag icon is defined as (C)oding Query.
Definition	The configurable meaning of the coding flag.

Coding Requests page

Some of the information that appears on this page is configurable by an administrator through the element configuration options. The following table entries represent the default configuration.

The help for this page includes descriptions for core fields, actions, and buttons only.

Field

Coding Requests page	
Field	Description
Verbatim field	<p>The verbatim to search for. Searches are <i>case-insensitive</i>. The search supports the special characters *, %, ?, and _.</p> <p>The search text field can be any text string and can contain wildcard characters to facilitate matching when the exact text is not known. The percent sign (%) or asterisk (*) matches any sequence of characters; the question mark (?) or underscore (_) matches any single character.</p>
Subject ID field	A source application identifier for the subject associated with the coding request. This information comes from the source application.
Notes	<p>Indicates that there is a note associated with the coding request.</p> <p>Pointing to the Note icon displays the text for each entry in the note. The note entries are sorted from newest to oldest.</p>
Flag	Indicates that the coding request requires attention. A Central Coding administrator can configure the meaning of each coding flag.
Verbatim header	<p>The original reported text that describes the adverse event, disease, drug, or other item to be coded. This information comes from the source application.</p> <p>Verbatims that are updated in the source application after they are coded in the Central Coding application are highlighted in yellow. The highlight is removed when the request status is Completed, delivered.</p> <p>In a self-hosted environment, the first 25 characters of the context items (Indication and Route of Administration) associated with the verbatim appear below the verbatim if the Display Context Items on Coding Requests and Approvals pages option is selected on the System Configuration page.</p>
Code	<p>The classification level code value. You can view the full coding details for a coded item from the View Full Coding dialog box. The details include the dictionary name and version, the coded term and value, and the level of the dictionary hierarchy where the match was found.</p> <p>The sort on this column is case-insensitive.</p>
Lowest and Highest Level Term	The terms associated with the levels of the dictionary. The terms are displayed on the page based on the options selected on the Element Configuration page.

Coding Requests page	
Site	A unique identifier for the subject site. This information comes from the source application.
Study	The name of the study. The name is an active link if your environment is integrated with the InForm application. The link opens the InForm application page for the study.
Form Name	RefName of the form associated with the request. This information comes from the source application.
Subject ID header	The source application identifier for the subject associated with the coding request. This information comes from the source application.

Actions

Coding Requests page		
Action	Shortcut	Description
Review Complete	Ctrl+Shift+R	Completes the review of an autocoded request. The status changes to Complete and the request is ready for approval.
Clear Code		Removes the code value only for the selected verbatim. Clearing the code values in the Central Coding application clears the corresponding code values in the source application.
Approve Candidate	Ctrl+Shift+K	Opens the Approve Query dialog box, where you can approve a query in the Candidate state, and assign it to the Open state.
Retry Query Delivery		Changes the delivery status for a query that failed delivery to the source application back to the previous state, so that the query can be resent to the source application.
Retry Delivery		Changes the delivery status for a request with a failed delivery to the source application to Completed, awaiting delivery. This allows the request to be picked up by the job queue so that it can be resent to the source application. Requires the Retry Delivery right.

Buttons

Coding Requests page		
Button	Shortcut	Description
Code	Ctrl+Shift+C	<p>Code and propagate. Opens the Coding Browser dialog box, where you can interactively code and propagate the value for the selected verbatim.</p> <p>The application propagates the selected code value to other uncoded requests with the same verbatim, coding definition, and context information.</p> <p>The coding propagates only to requests associated with unlocked studies.</p>
Code Single	Alt+M	<p>Opens the Coding Browser dialog box, where you can interactively code the selected verbatim.</p> <p>The application codes only the selected item.</p>

Compare Coding Results dialog box



This page is used for impact analysis. The differences in coding results between the original and the new dictionary versions are highlighted in yellow.

The help for this page includes descriptions for core fields, actions, and buttons only.

Compare Coding Results dialog box	
Field	Description
Primary Path?	Indicates whether the path is the primary path for the dictionary. This information appears only for the MedDRA or MedDRA-J dictionary.
Level	The hierarchy level where the term appeared in the dictionary.
Code	The code value for the term in the dictionary version.
Term	The standardized word or phrase associated with the code in the dictionary version.
Additional Info	Any additional information associated with the dictionary version.


Create Query dialog box

The help for this page includes descriptions for core fields, actions, and buttons only.

Create Query dialog box	
Field	Description
Copy ( icon)	Copies the verbatim text to the Other text box for editing.
Reason	Descriptive text about the reason for creating the query. A Central Coding administrator can configure the default reasons, and can specify which reason appears first in the drop-down list.
Copy ( icon)	Copies the text from the Reason drop-down list to the Other text box for editing.
Add as standard reason	<p>Adds the text in the Other field to the list of standard reasons that appear in the Reason list.</p> <p>The Add as standard reason checkbox appears only for users who have the Manage Standard Reasons right.</p>
Query State	<p>The state assigned to the query.</p> <ul style="list-style-type: none"> • Open—Visible and able to be addressed by an InForm user in the InForm application. • Candidate—Preliminary query not visible to an InForm user in the InForm application. A Central Coding administrator can assign a query to the Open or Deleted state. <p>Only users with the Issue Candidate Query right can create queries in Candidate state.</p>
Auto close query upon coding complete	<p>Closes the query when the associated verbatim is successfully coded and approved.</p> <p>This option is available only if Allow Auto Close is enabled for the study group associated with the verbatim.</p>
Add to auto query list	<p>Indicates whether the Central Coding application duplicates the query and applies it to matching verbatims that are subsequently opened in the study group.</p> <p>This option is available only if Allow Auto Query is enabled for the study group associated with the verbatim.</p>

Delete Query dialog box

The help for this page includes descriptions for core fields, actions, and buttons only.

Delete Query dialog box	
Field	Description
Reason	Descriptive text about the reason to delete the query. A Central Coding administrator can configure the default reasons and can specify which reason appears first in the list.
Copy ( icon)	Copies the text from the Reason drop-down list to the Other text box for editing.
Add as standard reason	Adds the text in the Other field to the list of standard reasons that appear in the Reason list. The Add as standard reason checkbox appears only for users who have the Manage Standard Reasons right.

Dictionaries page

The help for this page includes descriptions for core fields, actions, and buttons only.

Fields

Dictionaries page	
Field	Description
Type	The installed dictionary. Opens the [Dictionary Name] page, where you can view details about the dictionary. The information that appears on this page is defined when loading the dictionary.
Culture	A combination of attributes including language, date formats, and currency.
Status	The state of the dictionary. Only dictionaries with a status of Active appear on the page and are available for coding. The status is defined in the Dictionary Loader tool.

Actions

Dictionaries page		
Action	Shortcut	Description
Element Configuration		Opens the Element Configuration page, where you can specify dictionary elements that control the availability of coding features and information to users.
View Dictionary Changes	Ctrl+Shift+D	Opens the Dictionary Changes page, where you can view the complete list of source and target dictionary versions that have been compared.

Dictionary Changes page

This page is used for impact analysis.

The help for this page includes descriptions for core fields, actions, and buttons only.

Fields

Dictionary Changes page	
Field	Description
Source Dictionary Version	The original version of the coding dictionary.
Target Dictionary Version	The new version of the coding dictionary.
Status	The state of the comparison between the two dictionary versions.
Error	Descriptive information about a dictionary comparison that did not run successfully.

Actions

Dictionary Changes page	
Action	Description
New	Opens the Dictionary Selection dialog box, where you can select two dictionary versions of the same type and culture to compare.
Rerun	Reruns the dictionary comparison for the selected dictionary set. You can rerun the comparison only if the Status is Failed.
View Term Changes	Opens the Term Changes page, where you can view the term changes between two dictionary versions of the same type and culture.
View Path Changes	Opens the Path Changes page, where you can view the path changes between two dictionary versions of the same type and culture.

Buttons

Dictionary Changes page	
Button	Description
New	Opens the Dictionary Selection dialog box, where you can select two dictionary versions of the same type and culture to compare.
View Term Changes	Opens the Term Changes page, where you can view the term changes between two dictionary versions of the same type and culture.
View Path Changes	Opens the Path Changes page, where you can view the path changes between two dictionary versions of the same type and culture.

[Dictionary Name] page

The help for this page includes descriptions for core fields, actions, and buttons only.

[Dictionary Name] page—Dictionary Information	
Field	Description
Type	The installed dictionary.
Culture	A combination of attributes including language, date formats, and currency.
Adapter Type	The type of dictionary to be used by the coding engine. The standard adapters are MedDRA, WHO-DD, and JDrug. For custom dictionaries, the adapter is Custom.
Levels	The number of hierarchy levels in the dictionary.
Punctuation String	The punctuation to be removed by a step in the coding algorithm, to help increase the chance of a coding match. The punctuation string is defined in the Dictionary Loader tool.
Status	The state of the dictionary. Only dictionaries with a status of Active appear in the page and are available for coding. The status is defined in the Dictionary Loader tool.
Supports	Indicates the dictionary items that the Central Coding application supports.

[Dictionary Name] page—Levels	
Field	Description
Term Label	The full name for the level in the dictionary hierarchy.

Dictionary Selection dialog box

This page is used for impact analysis.

The help for this page includes descriptions for core fields, actions, and buttons only.

Dictionary Selection dialog box	
Field	Description
Old Dictionary	The original version of the coding dictionary.
New Dictionary	The new version of the coding dictionary. The specified version must be of the same type and culture as the original version.

Element Configuration page

Use the Element Configuration page to specify which coding features and information are available in the user interface.



The element configuration settings determine the:



- Autocode targets.
- Information that appears on the request list view pages and in the coding browser displays.
- Dictionary elements that are saved in the database and can be returned to the source application with a coding match.
- Dictionary elements that can be exported to an external application with the request.
- Data items to be reconciled during impact analysis.

The dictionary elements that appear on this page depend on the dictionary type.







The help for this page includes descriptions for core fields, actions, and buttons only.



Fields

Element Configuration page—Request List Page Display	
Field	Description
Name	The hierarchy level in the dictionary.
Move up ()	Moves the item to the left in the page display.
Move down ()	Moves the item to the right in the page display.

Element Configuration page—Search Page Display	
Field	Description
Name	The hierarchy level in the dictionary.
In Field	Indicates whether to include the associated Name in the In field drop-down list in the coding browser.
Move up ()	Moves the item to the left in the page display.
Move down ()	Moves the item to the right in the page display.

Element Configuration page— Browse Page Display	
Field	Description
Name	The hierarchy level in the dictionary.
Include Code	Indicates whether to include the code for a term in the coding browser. This option appears only for an element that represents a term in the dictionary.
Include Label	Indicates whether to include the label in the coding browser. This option appears only for an element that represents additional information on a level.

Element Configuration page— Elements	
Field	Description
Name	The hierarchy level in the dictionary.
Autocode Target	Indicates that the Central Coding application autocodes to this code, term, and dictionary level as default target.
Secondary Target	Indicates that the Central Coding application autocodes to this code, term, and dictionary level as the secondary target. You can use a secondary target to autocode to a non-primary path for MedDRA or MedDRA-J, or to codes from levels 1-4 for WHO-DD.
Return	Indicates that the Central Coding application saves the data associated with the dictionary level and returns it to the source application.
Exportable	Indicates that you can export the data associated with the dictionary level. When selected, the Export option is available in the Reports folder.
Search Term	Adds the term that corresponds to the dictionary level to the Search Page Display section. The () grey icon indicates that the level already appears in the section. The () green icon indicates that the level is available to add to the section.
Search Code	Adds the code that corresponds to the dictionary level to the Search Page Display section. The () grey icon indicates that the level already appears in the section. The () green icon indicates that the level is available to add to the section.
Browse	Adds the dictionary level to the Browse Page Display section. The () grey icon indicates that the level already appears in the section. The () green icon indicates that the level is available to add to the section.


Element Configuration page— Elements	
Field	Description
Request List	Adds the dictionary level to the Request List Page Display section. The () grey icon indicates that the level already appears in the section. The () green icon indicates that the level is available to add to the section.
Requires Reconciliation	<p>When selected, you must reconcile any difference in the term, the code, or in the Additional Information text for the dictionary element during impact analysis.</p> <p>If you select the Return checkbox for an item, the Requires Reconciliation checkbox is selected by default for the item.</p> <p>New codings that differ from the original codings only in elements that do not have this checkbox selected do not appear on the Reconcile Verbatims page. However, they are included in the Impact Analysis Report.</p>

Actions

Element Configuration page	
Action	Description
Clear Phase 2 Target	Clears the Secondary Target selection from the Elements section.

Force Close Query dialog box

The help for this page includes descriptions for core fields, actions, and buttons only.

Force Close Query dialog box	
Field	Description
Reason	Descriptive text about the reason to close the query. A Central Coding administrator can configure the default reasons and can specify which reason appears first in the list.
Copy () icon	Copies the text from the Reason drop-down list to the Other text box for editing.

In Process page

This page is used for impact analysis.

The help for this page includes descriptions for core fields, actions, and buttons only.

Fields

In Process page	
Field	Description
Source Name	The original coding definition.
Type	The type of the original coding dictionary.
Culture	The culture setting associated with the original coding dictionary.
Source Version	The version of the original coding dictionary.
Target Name	The new coding definition.
Target Version	The version of the new coding dictionary.
Auto Reconcile Term Changes	Indicates whether the Auto Reconcile Terms option was selected in the Choose Source And Target Coding Definitions dialog box.
Affected Study(s)	The studies affected by the change in coding definition.
Requests Analyzed	The number of coding requests analyzed during the impact analysis process.
Requests Impacted	The number of coding requests affected by the dictionary change.
Step	The current processing step of the impact analysis process. <ul style="list-style-type: none"> • Prepare • Reconcile • Update
Status	The status of the processing step. <ul style="list-style-type: none"> • In Process • Not Started • Scheduled • Running • Complete
Report	A link to the Document Viewer page, where you can view the results for the selected coding definition in Rich Text Format (RTF).

Actions

In Process page		
Action	Shortcut	Description
Rerun		Reruns the impact analysis process for the selected coding definition set. You can rerun the comparison only if the Status is Failed.
Reconcile	Ctrl+Shift+R	Opens the Reconcile Verbatims page, where you can reconcile the verbatims affected by the change in coding definition. This action is available only when there are verbatims to reconcile.
Update	Ctrl+Shift+U	Saves approved verbatim changes to the database. You cannot undo this action.

Buttons

In Process page		
Button	Shortcut	Description
Generate Report	Ctrl+Shift+G	Runs the Impact Analysis Report, which records the status of the impact analysis and verbatim reconciliation process.
Export	Ctrl+Shift+E	Exports the impact analysis data in a Comma-Separated Value (CSV) file.
Reconcile	Ctrl+Shift+R	Opens the Reconcile Verbatims page, where you can reconcile the verbatims affected by the change in coding definition. This button is available only when there are verbatims to reconcile.
Update	Ctrl+Shift+U	Saves approved verbatim changes to the database. You cannot undo this action.

Locks page

The help for this page includes descriptions for core fields, actions, and buttons only.

Fields

Locks page	
Field	Description
Object Type	A system-created description of the item that is locked.
Object Identification	A system-created identifier for the Object Type.
User Name	The account name of the user who has locked the item.
Expiration	The date and time that the lock expires.

Actions

Locks page		
Action	Shortcut	Description
Revoke	Ctrl+Shift+Delete	Clears the system lock on the selected item. Any unsaved changes made to the object are lost.

Buttons

Locks page		
Button	Shortcut	Description
Revoke	Ctrl+Shift+Delete	Clears the system lock on the selected item. Any unsaved changes made to the object are lost.

My Profile dialog box

The help for this page includes descriptions for core fields, actions, and buttons only.

My Profile dialog box—User Information	
Field	Description
Display name	Your screen name.
Username	Your system login name. In an Oracle SSO environment, the username format is <i>organization_ID.username</i> .
Organization ID	The ID for your organization. For Oracle SSO environments only. The ID may change through acquisition.

My Profile dialog box—User Settings	
Field	Description
List page size	The number of rows that appear on a single list view page. The range is from 1 to 100.

My Profile dialog box—Personal information	
Field	Description
Culture	A combination of attributes including language, date formats, and currency.
Home page	The address of your web page.

New Adapter/[Adapter Name] page

The help for this page includes descriptions for core fields, actions, and buttons only.

New adapter/ [Adapter Name] page	
Field	Description
Adapter type	The product type that sends the requests. The Central Coding application defines this property.
Adapter URL	The URL for the server where the InForm Adapter software is installed. If you are using authentication to call the InForm Adapter web services, you must use a TLS connection (https).
Test button	Initiates a test of the connection to the adapter. If the test is successful, the names of the studies that are associated with the adapter appear on the page.
Call AdapterAdmin Interface	Indicates the authentication method for calling the InForm Adapter Administration interface when the Adapter URL starts with https.
Call Coding Interface	Indicates the authentication method for calling the InForm Adapter Coding interface when the Adapter URL starts with https. If you select User Name/Password, you must enter the InForm authentication user name and password on the System Configuration page or the Study Information page for the studies associated with the adapter.
Call Discrepancy Interface	Indicates the authentication method for calling the InForm Adapter Discrepancy Enhanced interface when the Adapter URL starts with https. If you select User Name/Password, you must enter the InForm authentication user name and password on the System Configuration page or the Study Information page for the studies associated with the adapter.

[New Algorithm] page

The help for this page includes descriptions for core fields, actions, and buttons only.



[New Algorithm] page	
Field	Description
Name	The name of the algorithm. You cannot modify this information after you save the algorithm.
Description	Descriptive information about the algorithm. You cannot modify this information after you save the algorithm.

[New Assignment Rule]/[Assignment Rule Name] page

The help for this page includes descriptions for core fields, actions, and buttons only.

[New Assignment Rule]/[Assignment Rule Name] page— Rule Properties	
Field	Description
Coding Definition	The coding definition that the selected assignment rule uses to process coding requests.
Attempt autocode	Indicates whether the application attempts to autocode incoming requests.
Autocoding requires approval	Indicates whether autocoded values require approval. If selected, the application routes autocoded requests to the Approvals page so that an approver can review them.
Autocoding requires review	Indicates whether autocoded values require review. If selected, the application routes autocoded requests to the Coding Requests page and sets the status to Needs Review so that a coder can review them.
Interactive coding requires approval	Indicates whether interactively coded values require approval. If selected, the application routes interactively coded requests to the Approvals page so that an approver can review them.
Coding result requires delivery	Indicates whether the Central Coding application returns coded values to the InForm application.
Delete request after delivery	Indicates that, for a specified assignment rule, the application deletes coding requests that were coded and delivered to the source application. This option is available only if the Show Delete Request After Delivery Option checkbox is selected on the System Configuration page. Oracle recommends using this option as infrequently as possible.

[New Assignment Rule]/[Assignment Rule Name] page—
Rule Text and Workteam Assignment

Field	Description
Request property	<p>The property on which to base the assignment rule.</p> <ul style="list-style-type: none"> • ClientName—The name of the source application for which the Central Coding application is coding the request. • Product—The product type for the request. The Central Coding application defines this property. • ClientHost—The name of the server for the study. • Verbatim—The original reported text that describes the adverse event, disease, drug, or other item to be coded. This information comes from the source application. • DictType—The dictionary type. • StudyName—The name of the study. • Site—A unique identifier for the subject site. This information comes from the source application. • VisitName—The name of the visit. This information comes from the source application. • ItemType—The kind of item to be coded. This information comes from the source application. • FormName—The form RefName. This information comes from the source application.
Operators	The comparison value.
Value	The value for the Request property.
	Adds the specified value to the Rule text field.
Rule text	The assignment rule that the application evaluates, in simple syntax language.
	Checks the syntax of the rule text. If the data in the Value field is invalid, the Central Coding application cannot assign incoming requests using the assignment rule.

[New Role]/Role Details page

The help for this page includes descriptions for core fields, actions, and buttons only.

New Role/Role Details page— Assigned Rights	
Field	Description
Category	The type or grouping of the rights available in the system.

New Study Information page/[Study Name] Study Information page—Edit

The help for this page includes descriptions for core fields, actions, and buttons only.

New Study Information page/[Study Name] Study Information page—Edit	
Field	Description
Source Application	The name of the application that is integrated with the Central Coding application.
Adapter	The name of the physical server where the study is installed.
Trial	The name of the study. The Central Coding application does not support multiple studies with the same study name.
URL	The base URL for the study.
Study Group	<p>Name of the study group to which the study belongs. A study group specifies auto close and auto query settings for a subset of studies in the Central Coding application.</p> <p>The Central Coding application includes a default study group called System.</p>
PutCodes Client Audit User	<p>A transaction user that the Central Coding application uses to return codes and approval details to the InForm application. The InForm audit records show this user name as the user who entered or modified the coding results.</p> <ul style="list-style-type: none"> For SSO-enabled InForm studies, the user name format is <i>organization_ID.username</i>. This field is case-sensitive and must match the InForm name exactly. For all other studies, the account name is the user name only.

New Study Information page/[Study Name] Study Information page—Edit	
Field	Description
InForm Query User	<p>The user name used to create and update queries in the InForm application. The user name appears in the InForm application as the user who created each Central Coding query.</p> <p>In an Oracle SSO environment:</p> <ul style="list-style-type: none"> For SSO-enabled InForm studies, the user name format is <i>organization_ID.username</i>. <p>This field is case-sensitive and must match the InForm name exactly.</p> <ul style="list-style-type: none"> For all other studies, the account name is the user name only. <p>If the field is blank, the Central Coding application uses the Query Create User in Client on the System Configuration page to communicate with the InForm study.</p>
InForm Authentication User and InForm Authentication User Password	<p>The user name and password of an InForm application user created to communicate with the InForm server through web services.</p> <p>The specified user:</p> <ul style="list-style-type: none"> Is required only when username/password authentication is selected on the Adapter page for calls to the InForm Adapter Coding and Discrepancy interfaces. Should have no additional rights in the InForm application. Should be different from the transaction users specified in the PutCodes Client Audit User and Query Create User in Client fields. <p>The InForm authentication user details are:</p> <ul style="list-style-type: none"> Valid only when both fields contain values. Used either for all studies or for the studies associated with a specific adapter. <p>The InForm Authentication User field is case-sensitive.</p> <p>If the field is blank, the Central Coding application uses the InForm Authentication User and Password on the System Configuration page to communicate with the InForm study.</p>
Support Query	<p>Indicates whether the study supports query management. This option must be selected only for studies that come from the InForm application.</p>
Study Locked	<p>Locks the study in the Central Coding and the InForm applications. On the All Requests page, only administrators can view the requests associated with the study.</p>

[New Synonym] page

The help for this page includes descriptions for core fields, actions, and buttons only.

Fields

[New Synonym] page	
Field	Description
Term	The coded term. This field is blank until you code and save the new synonym.
Code	The classification level code value. This field is blank until you code and save the new synonym.

Actions

[New Synonym] page	
Action	Description
Code	Opens the Coding Browser dialog box, where you can interactively code the proposed synonym.

Buttons

[New Synonym] page	
Button	Description
Code	Opens the Coding Browser dialog box, where you can interactively code the proposed synonym.

[New Synonym List] page

The help for this page includes descriptions for core fields, actions, and buttons only.

[New Synonym List] page	
Field	Description
Dictionary	The coding dictionary, version, and culture associated with the synonym list.
Parent	The name of the synonym list to inherit. When you create a synonym list by inheriting the contents of another list, the child synonym list appears to contain the synonyms from both lists. However, the list contains only its own synonyms; it does not include the synonyms from the inherited list.

[New Synonym List] copied from [Synonym List Name] page

The help for this page includes descriptions for core fields, actions, and buttons only.

[New Synonym List Name] copied page	
Field	Description
Dictionary	The coding dictionary, version, and culture associated with the synonym list.
Parent	The name of the synonym list that the list selected for copy inherited. This field appears only if the list being copied is an inherited list.
Include children?	Indicates whether to copy the child synonym lists of the selected parent synonym list. This field appears only if the list being copied is a parent synonym list.

[New Stopword List] page

The help for this page includes descriptions for core fields, actions, and buttons only.

[New Stopword List] page	
Field	Description
Parent	The name of the stopword list to inherit. When you create a stopword list by inheriting the contents of another list, the child stopword list appears to contain the stopwords from both lists. However, the list contains only its own stopwords; it does not include the stopwords from the inherited list.

[New Stopword List] copied from [Stopword List Name] page

The help for this page includes descriptions for core fields, actions, and buttons only.

[New Stopword List Name] copied from [Stopword List Name] page	
Field	Description
Parent	The name of the stopwords list which the selected list inherited. This field appears only if the list is inherited.
Include children?	Indicates whether to copy the child stopwords lists of the selected parent stopwords list. This field appears only if the list being copied is a parent stopwords list.

[New User]/[User Name] page

The New User page is available only in an environment with native authentication.

The help for this page includes descriptions for core fields, actions, and buttons only.

[New User]/[User Name] page—User Information	
Field	Description
Display name	The screen name for the user. In an environment with native authentication, you cannot modify this field after the user is created.
Username	The system login name for the user. You cannot modify this field after you create the user, or if the Central Coding application is running in an Oracle SSO environment.
Password	<p>The login password for a user.</p> <p>Passwords can be from 6 to 32 characters. For security purposes, Oracle recommends using a combination of letters and numbers. Passwords are case-sensitive.</p> <p>Only for environments with native authentication.</p> <p>Note: In an environment migrated to Oracle SSO authentication, this field is available for existing users that have not been migrated yet to the Oracle SSO environment. The password is required to link the former account with the Oracle SSO account.</p>
User must change password	<p>Indicates that the user must change the password at the next login. Any change to this option takes effect the next time the user logs in.</p> <p>Only for environments with native authentication.</p> <p>Note: In an environment migrated to Oracle SSO authentication, this option is available for existing users that have not been migrated yet to the Oracle SSO environment. Select this option if the user forgets the former password. The password is required to link the former account with the Oracle SSO account.</p>
Organization ID	The ID for your organization. For Oracle SSO environments only. The ID may change through acquisition.

[New User]/[User
Name] page—
Personal Information

Field	Description
Culture	A combination of attributes including language, date formats, and currency.
Home page	The Web page address of the user.

[New Work Team]/Work Team Details page

The help for this page includes descriptions for core fields, actions, and buttons only.

[New Work Team]/Work Team Details page	
Field	Description
Username	The system login name of the user.

Path Changes page

This page is used for impact analysis.

The help for this page includes descriptions for core fields, actions, and buttons only.

Fields

Path Changes page	
Field	Description
Term	The term whose path has changed.
Path Changes	A link that opens the View Path Changes Detail dialog box, where you can view a summary of the path changes between dictionary versions.

Actions

Path Changes page	
Action	Description
Export	Exports the list of changes in a Comma-Separated Value (CSV) file.

Buttons

Path Changes page	
Button	Description
View Path Changes Detail	Opens the View Path Changes Detail dialog box, where you can view a summary of the path changes between dictionary versions.
Export	Exports the list of changes in a Comma-Separated Value (CSV) file.

Produce Report/View Report Request dialog box

The help for this page includes descriptions for core fields, actions, and buttons only.

Produce Report dialog box—AutoCode Export	
Field	Description
Study	The name of the study from the selected study group for which to include data.
Start Date	The start date for the period covered by the export. The date must be in the format the system administrator specifies on the System Configuration page. You can enter the current date into a date field by inserting an equal sign (=).
End Date	The end date for the period covered by the export. The date must be in the format the system administrator specifies on the System Configuration page. You can enter the current date into a date field by inserting an equal sign (=).

Produce Report dialog box—Coding Consistency Export	
Field	Description
Study	The name of the study from the selected study group for which to include data.
Verbatim	The verbatim for which to view coding information. If the field is blank, the Central Coding application displays information for all verbatims. Searches are <i>case-insensitive</i> . The search supports the special characters *, %, ?, and _. The search text field can be any text string and can contain wildcard characters to facilitate matching when the exact text is not known. The percent sign (%) or asterisk (*) matches any sequence of characters; the question mark (?) or underscore (_) matches any single character.
Coding Mode	The methods used to code each request.
Upper and Lower Level	The level of the dictionary hierarchy to include in the export. This option is available based on the selected Dictionary Type.

Produce Report dialog box—Coding Consistency Export	
Field	Description
Start Date	<p>The start date for the period covered by the export. The date must be in the format the system administrator specifies on the System Configuration page.</p> <p>You can enter the current date into a date field by inserting an equal sign (=).</p>
End Date	<p>The end date for the period covered by the export. The date must be in the format the system administrator specifies on the System Configuration page.</p> <p>You can enter the current date into a date field by inserting an equal sign (=).</p>
Show only verbatims with inconsistent codes	<p>Indicates whether the report displays information only about verbatims that received different codes in various instances.</p> <ul style="list-style-type: none"> • If a verbatim is specified in the Verbatim field, the report displays inconsistent codes information about that verbatim. • If a verbatim is not specified in the Verbatim field, the report displays inconsistent codes information about all the verbatims.

Produce Report dialog box—Coding Consistency Report/View Report Request dialog box— Coding Consistency Report	
Field	Description
Verbatim	<p>The verbatim for which to view coding information. If the field is blank, the Central Coding application displays information for all verbatims.</p> <p>Searches are <i>case-insensitive</i>. The search supports the special characters *, %, ?, and _. The search text field can be any text string and can contain wildcard characters to facilitate matching when the exact text is not known. The percent sign (%) or asterisk (*) matches any sequence of characters; the question mark (?) or underscore (_) matches any single character.</p>

Produce Report dialog box—Coding Consistency Report/View Report Request dialog box— Coding Consistency Report	
Field	Description
Coding Mode	<p>The methods used to code the request.</p> <ul style="list-style-type: none"> • Both—Includes the data for both interactively and automatically coded items. • Interactive—Includes only the data for interactively coded items. • Autocode—Includes only the data for automatically coded items.
Start Date	<p>The start date for the period covered by the report. The date must be in the format the system administrator specifies on the System Configuration page.</p> <p>You can enter the current date into a date field by inserting an equal sign (=).</p>
End Date	<p>The end date for the period covered by the report. The date must be in the format the system administrator specifies on the System Configuration page.</p> <p>You can enter the current date into a date field by inserting an equal sign (=).</p>
Show only verbatims with inconsistent codes	<p>Indicates whether the report displays information only about verbatims that received different codes in various instances.</p> <ul style="list-style-type: none"> • If a verbatim is specified in the Verbatim field, the report displays inconsistent codes information about that verbatim. • If a verbatim is not specified in the Verbatim field, the report displays inconsistent codes information about all the verbatims.

Produce Report dialog box—Coded Items Export	
Field	Description
Study	The name of the study from the selected study group for which to include data.

Produce Report dialog box—Coded Items Export	
Field	Description
Start Date	<p>The start date for the period covered by the export. The date must be in the format the system administrator specifies on the System Configuration page.</p> <p>You can enter the current date into a date field by inserting an equal sign (=).</p>
End Date	<p>The end date for the period covered by the export. The date must be in the format the system administrator specifies on the System Configuration page.</p> <p>You can enter the current date into a date field by inserting an equal sign (=).</p>
Status	The type of items to include in the export based on their approval status.
Export Codes	Exports the code values associated with the selected studies and coding definition. Whether this option is available is set by your system administrator.

Produce Report dialog box—Coded Items Report/View Report Request dialog box— Coded Items Report	
Field	Description
Study	The name of the study from the selected study group for which to include data.
Start Date	<p>The start date for the period covered by the report. The date must be in the format the system administrator specifies on the System Configuration page.</p> <p>You can enter the current date into a date field by inserting an equal sign (=).</p>
End Date	<p>The end date for the period covered by the report. The date must be in the format the system administrator specifies on the System Configuration page.</p> <p>You can enter the current date into a date field by inserting an equal sign (=).</p>

Produce Report dialog
 box—Coded Items
 Report/View Report
 Request dialog box—
 Coded Items Report

Field	Description
Cumulative	<ul style="list-style-type: none"> • Selected—Report includes the items coded in the application through the specified end date. Items in the specified date range appear in the report highlighted in pink. Items outside of the date range appear in the report but are not highlighted. • Not selected—Report includes only the items that were coded in the application in the specified date range.

Produce Report dialog
 box—Coder Metrics
 Export

Field	Description
Start Date	<p>The start date for the period covered by the export. The date must be in the format the system administrator specifies on the System Configuration page.</p> <p>You can enter the current date into a date field by inserting an equal sign (=).</p>
End Date	<p>The end date for the period covered by the export. The date must be in the format the system administrator specifies on the System Configuration page.</p> <p>You can enter the current date into a date field by inserting an equal sign (=).</p>
Show Coding Definitions	Indicates whether to include the coding definition used in each study.

 Produce Report dialog
 box—New Export

Field	Description
Export Type	<p>Indicates the export to run:</p> <ul style="list-style-type: none"> • AutoCode Export—Details the percentage of autocoded items for one or each study in a specified date range. • Auto Suggestion List Export—Details the auto-suggestion list for a coding definition. • Coded Items Export—Details the coded items in one or all studies from one or all study groups in a specified date range. The report is based on the approval status and includes approver name details. • Coder Metrics Export—Details the coding work that each coder has done in the specified time frame, including the number of verbatims manually coded, approved, and in the Coded, awaiting approval state, as well as the number of queries opened and closed. • Coding Consistency Export—Details the codings for a specified dictionary type, study, verbatim, and coding mode in a specified date range. • Query Export—Details the queries or the status of queries opened in the Central Coding application for a study. • Study Metrics Export—Details the coding work in a study during the specified time frame, including the number of verbatims received, autocoded, manually coded, approved, awaiting approval, and delivered, as well as the number of opened and closed queries. • Synonym List Export—Details a synonym list for a coded definition. • Uncoded Items Export—Details the uncoded items for one or each study in a specified date range. <p>The Central Coding application places this information in a Comma-Separated Value (CSV) file for use by an external application such as Microsoft Excel spreadsheet software.</p>

 Produce Report dialog
 box—New Request

Field	Description
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Produce Report dialog box—New Request	
Field	Description
Report Type	<p>Specifies the report type to run.</p> <ul style="list-style-type: none"> • Coded Items Report—Provides detailed information on the coded items in one or all studies from one or all study groups in a specified date range, based on the approval status. The report provides the verbatim, indication, dictionary, coder, approver, study name, delivery status, route of administration, coding type, date coded, subject ID, level, term, code value, and total request count. • Coding Consistency Report—Provides detailed information on the codings for a specified dictionary type, study, verbatim, and coding mode in a specified date range. The report provides the grand total request count, and, for each verbatim, the total request count, the requested dictionary level terms, the code values, and the request count per code value. • Workteams, Roles, and Rights by User—Provides a list of assigned work teams, roles, and rights for each active user in the system. <p>You must enter parameters for each report type, except for the Workteams, Roles, and Rights by User report.</p>
Report Name	A name for the report. By default, this is the same as the Report Type.

Produce Report dialog box—Query Export	
Field	Description
Study	The name of the study from the selected study group for which to include data.
Query Status	The type of requests to include in the export based on the status of the queries associated with the requests.

Produce Report dialog box—Study Metrics Export	
Field	Description
Study	The name of the study from the selected study group for which to include data.

Produce Report dialog box—Study Metrics Export	
Field	Description
Start Date	<p>The start date for the period covered by the export. The date must be in the format the system administrator specifies on the System Configuration page.</p> <p>You can enter the current date into a date field by inserting an equal sign (=).</p>
End Date	<p>The end date for the period covered by the export. The date must be in the format the system administrator specifies on the System Configuration page.</p> <p>You can enter the current date into a date field by inserting an equal sign (=).</p>
Show Coding Definitions	Indicates whether to include the coding definition used in each study.

Produce Report dialog box—Uncoded Items Export	
Field	Description
Study	The name of the study from the selected study group for which to include data.
Start Date	<p>The start date for the period covered by the export. The date must be in the format the system administrator specifies on the System Configuration page.</p> <p>You can enter the current date into a date field by inserting an equal sign (=).</p>
End Date	<p>The end date for the period covered by the export. The date must be in the format the system administrator specifies on the System Configuration page.</p> <p>You can enter the current date into a date field by inserting an equal sign (=).</p>
Status	The type of requests to include in the export based on the Uncoded or Recode status associated with the request.

Queries page

The help for this page includes descriptions for core fields, actions, and buttons only.

Fields

Queries page	
Field	Description
Form filter	A filter that identifies the queries to view based on the form that contains the verbatim associated with the query.
Age	The age of the query in days.
Verbatim	The original reported text that describes the adverse event, disease, drug, or other item to be coded. This information comes from the source application.
Study	The name of the study. The name is an active link if your environment is integrated with the InForm application. The link opens the InForm application page for the study.
Site	A unique identifier for the subject site. This information comes from the source application.
Subject ID	A source application identifier for the subject associated with the coding request. This information comes from the source application.

Buttons

Queries page		
Button	Shortcut	Description
Approve Candidate	Ctrl+Shift+K	Opens the Approve Query dialog box, where you can approve a query in the Candidate state and assign it to the Open state.
Delete Query	Ctrl+Shift+D	Opens the Delete Query dialog box, where you can delete a query in the Candidate state.
Retry Query Delivery		Changes the delivery status for a query that failed delivery to the source application back to the previous state, so that the query can be resent to the source application.
Force Close Query	Ctrl+Shift+Delete	Opens the Force Query dialog box, where you can close a query in any state if you have the Force Close Query right.

Queries page		
Button	Shortcut	Description
Manage Auto Query	Ctrl+Shift+M	Opens the Auto Query List page, where you can manage the verbatims for which a query is automatically created in the Central Coding application.

Query History page

The help for this page includes descriptions for core fields, actions, and buttons only.

Query History page	
Field	Description
Query status	<p>The query status.</p> <ul style="list-style-type: none"> • Opened (🔴?)—Entered in the Central Coding application by a Central Coding user to be addressed by an InForm user. • Candidate (🔴?)—Entered by a Central Coding user with the Issue Candidate Query right. • Answered (🔵!)—Open query that was addressed by an InForm user. • Closed (🟢✔️)—Query on a verbatim that was successfully coded and approved. A query can enter the Closed state if it is manually closed by a Central Coding user or automatically closed by the Central Coding application. • Deleted (🔴❌)—Candidate query that was deleted by a Central Coding user with the Issue Candidate Query right. Only queries in the Candidate state can be deleted. • Undeliverable, retry (🔴❌🔄)—Opened query whose data could not be delivered to the source application because of a communication issue. The Central Coding application retries delivery when the next Get Requests job runs. • Undeliverable, cannot retry (🔴❌)—Opened query whose data could not be delivered to the InForm application because the form is locked or deleted in the InForm application. As a result, the query is closed in the Central Coding application.
Date	The date of each transaction related to the query.
User	The user who entered or most recently modified the query in the Central Coding application.
Status	<p>The status of the query:</p> <ul style="list-style-type: none"> • Candidate • Opened • Answered • Deleted

Query History page	
Field	Description
Closed by Client	<p>Indicates whether the query was closed by a user in the InForm application:</p> <ul style="list-style-type: none"> • Yes • No • Blank
Send State	<p>The delivery status of the query:</p> <ul style="list-style-type: none"> • Pending—The query has not yet been delivered to the InForm application. • Failed—The Central Coding application could not deliver the query data to the InForm application due to an error. When you resolve the error, the Central Coding application attempts to deliver the query data again. • DUP_TXID—The query already exists in the InForm application. This can occur in rare situations if a query was successfully created in the InForm application, but the Central Coding application did not receive a confirmation due to network issues. The Central Coding application resolves this issue. • INVAL_REV—The Central Coding application cannot transfer the updates for the query to the InForm application. This can occur if a query was updated in the InForm application before it was updated in the Central Coding application. In this case, the updates from the InForm application overwrite the changes made in the Central Coding application.
Send Error	The text of the error if the delivery to the InForm application failed.
Reason	The reason the user entered when the query was created.

Query Standard Reason List page

The help for this page includes descriptions for core fields, actions, and buttons only.

Fields

Query Standard Reason List page	
Field	Description
Action Type filter	The query action for which to view associated standard reasons.
Action Type field	The query action to associate with the standard reason.
Update Date	The most recent date the reason was modified.

Actions

Query Standard Reason List page		
Action	Shortcut	Description
Add	Ctrl+Shift+A	Opens the Add [Action Type] Query Standard Reason page, where you can add a standard query reason for the action type that is selected in the Action Type drop-down list on the Query Standard Reason List page.
Edit	Ctrl+Shift+E	Opens the Edit [Action Type] Query Standard Reason page, where you can edit the selected standard reason.

Buttons

Query Standard Reason List page		
Button	Shortcut	Description
Add	Ctrl+Shift+A	Opens the Add [Action Type] Query Standard Reason page, where you can add a standard query reason for the action type that is selected in the Action Type drop-down list on the Query Standard Reason List page.
Edit	Ctrl+Shift+E	Opens the Edit [Action Type] Query Standard Reason page, where you can edit the selected standard reason.

Reason for change/Recode reason/Disapprove reason dialog box

The help for this page includes descriptions for core fields, actions, and buttons only.

Reason for change/Recode reason/Disapprove reason dialog box	
Field	Description
Reason	<p>Depending on the action, text that describes the reason for one of the following:</p> <ul style="list-style-type: none"> Reason for change dialog box—Making changes to the item. Recode reason dialog box—Assigning the new code to a coded request. Disapprove reason dialog box—Disapproving the code for a coding request. <p>1000 characters maximum.</p> <p>This field does not accept special characters. The Central Coding application saves the changes only if you complete this field.</p>

Reconcile Synonyms page

This page is used for impact analysis. The page lists terms and synonyms that no longer exist, or are no longer current in the new dictionary version.

The help for this page includes descriptions for core fields, actions, and buttons only.

Fields

Reconcile Synonyms page	
Field	Description
Deleted Term	The deleted or non-current term and associated code from the original dictionary version.
New Term	The term to replace the deleted or non-current term in the new dictionary version. The Code link opens the Coding Browser dialog box, where you can interactively recode the synonym.
Synonyms	The synonyms associated with the deleted or non-current term.
Action	The action to perform on the Deleted Term. <ul style="list-style-type: none"> • Selected—Deletes the term when you approve the changes on the page. The term is not copied to the new synonym list. The option is selected by default if the Set Synonym as Default option is selected on the System Configuration page. • Not selected—The Coding Browser dialog box opens and you can recode the term.

Actions

Reconcile Synonyms page		
Action	Shortcut	Description
Approve All	Ctrl+Shift+A	Saves and applies the selected Action to each synonym.

Buttons

Reconcile Synonyms page		
Button	Shortcut	Description
Approve All	Ctrl+Shift+A	Saves and applies the selected Action to each synonym.

Reconcile Verbatims page

This page is used for impact analysis. The page lists each verbatim affected by the dictionary upgrade. The help for this page includes descriptions for core fields, actions, and buttons only.

Fields

Reconcile Verbatims page	
Field	Description
Reason filter	Filters the items to view, based on the reason for a code and term change between dictionary versions.
Reason	The type of change found during impact analysis.
Context Items	Information from the source application such as the indication and route of administration for drugs. This column appears only for the WHO-DD or JDrug dictionary, or a dictionary for which context items are defined.
Original Coding Type	The type of coding originally performed on the verbatim. <ul style="list-style-type: none"> • I—Interactive • A—Automatic
Original Code and Term	Opens the Compare Coding Results dialog box, where you can view the differences in the coding results between the original and new dictionary version. This option is available only if the original code and term also exist in the new dictionary version. If a different code and term exist in the new dictionary version for the verbatim, a red asterisk icon appears.
New Code and Term	Opens the Compare Coding Results dialog box, where you can view the differences in the coding results between the original and new dictionary version. The new code and term appear only if the Central Coding application successfully autocoded the verbatim using the new coding definition. The Code link displays the code value for the term in the dictionary version. The Code link in parenthesis opens the Coding Browser dialog box, where you can interactively code the verbatim.
Algorithm Step	The step and its order in the algorithm where the New Code and Term were found.
Done	Indicates whether the decisions are complete for a verbatim. The Central Coding application applies the changes to the verbatim only after you select Approve All.

Reconcile Verbatims page	
Field	Description
Accept Uncode	<p>If selected, the Central Coding application rejects the original or new coding, and returns the verbatim to the coder's queue.</p> <p>This option appears if Allow Uncode is selected on the System Configuration page.</p>

Actions

Reconcile Verbatims page		
Action	Shortcut	Description
Approve All	Ctrl+Shift+A	Confirms the selected actions for each verbatim.

Buttons

Reconcile Verbatims page		
Button	Shortcut	Description
Approve All	Ctrl+Shift+A	Confirms the selected actions for each verbatim.

Reconciliation Options page


The information that appears on this page impacts the options that appear on the Reconcile Verbatims page.

The help for this page includes descriptions for core fields, actions, and buttons only.

Reconciliation Options page	
Field	Description
Reason	The cause of the difference in coding between the dictionary versions.
Difference	The element that produces different codings for a verbatim between dictionary versions.
Original Coding Mode	<p>The type of coding originally performed on the verbatim.</p> <ul style="list-style-type: none"> • I—Interactive • A—Automatic • I/A—Interactive or automatic
Default Action	<p>The verbatim reconciliation option to be selected by default on the Reconcile Verbatims page, when reconciling verbatims with the corresponding Reason and Difference.</p> <ul style="list-style-type: none"> • Accept New—Selects the new autocode result (code, term, and dictionary path) in the New Code and Term column. • Keep Original—Selects the initial coding (code, term, and dictionary path) in the Original Code and Term column. • Uncoded—Selects the Uncode option in the Accept Uncode column. <p>The Accept Uncode column appears on the page only if Allow Uncode is selected on the System Configuration page.</p>

Reissue Query dialog box



The help for this page includes descriptions for core fields, actions, and buttons only.

Reissue Query dialog box	
Field	Description
Reason	Descriptive text about the reason to reissue the query. A Central Coding administrator can configure the default reasons and can specify which reason appears first in the list.
Copy () icon	Copies the text from the Reason drop-down list to the Other text box for editing.
Add as standard reason	<p>Adds the text in the Other field to the list of standard reasons that appear in the Reason list.</p> <p>The Add as standard reason checkbox appears only for users who have the Manage Standard Reasons right.</p>

Report Requests page

The help for this page includes descriptions for core fields, actions, and buttons only.

Fields

Report Requests page	
Field	Description
Job Scheduler Status	<p>Indicates whether the job scheduler is running.</p> <ul style="list-style-type: none"> —The job scheduler is running. —The job scheduler is not running.
Report Type field	<p>A filter that identifies the items to view based on type.</p> <ul style="list-style-type: none"> • Coded Items Report—Provides detailed information on the coded items in one or all studies from one or all study groups in a specified date range, based on the approval status. The report provides the verbatim, indication, dictionary, coder, approver, study name, delivery status, route of administration, coding type, date coded, subject ID, level, term, code value, and total request count. • Coding Consistency Report—Provides detailed information on the codings for a specified dictionary type, study, verbatim, and coding mode in a specified date range. The report provides the grand total request count, and, for each verbatim, the total request count, the requested dictionary level terms, the code values, and the request count per code value. • Workteams, Roles, and Rights by User—Provides a list of assigned work teams, roles, and rights for each active user in the system. <p>You must enter parameters for each report type, except for the Workteams, Roles, and Rights by User report.</p>
Report Name	A name for the report. By default, this is the same as the Report Type. The link opens the parameters page for the report.
Report Type header	The name of a report.
Result	A link to the Document Viewer page, where you can view the results of the selected report in Rich Text Format (RTF).

Actions

Report Requests page		
Action	Shortcut	Description
Export	Ctrl+Shift+E	Opens the Produce Report dialog box, where you can export data in a Comma-Separated Value (CSV) file.
View Results	Ctrl+Shift+V	Opens the Document Viewer page, where you can view the results of the selected report in Rich Text Format (RTF).


Buttons

Report Requests page		
Button	Shortcut	Description
Export	Ctrl+Shift+E	Opens the Produce Report dialog box, where you can export data in a Comma-Separated Value (CSV) file.
View Results	Ctrl+Shift+V	Opens the Document Viewer page, where you can view the results of the selected report in Rich Text Format (RTF).

Request Details page

The help for this page includes descriptions for core fields, actions, and buttons only.

Fields

Request Details page—Request Information	
Field	Description
Item Type	<p>The type of item to be coded:</p> <ul style="list-style-type: none"> • AE—Adverse event • MEDPROD—Medical product • DISEASE • LABDATA • Drug <p>This information is defined in the Central Designer or Clintrial application.</p>
Coding Mode	The method used to code the request.
Algorithm Step	The step in the coding algorithm where the match was found. This information appears only if the request was autocoded.
Approver	The user who approved or disapproved the request.
Autocode Match Level	The level in the dictionary hierarchy where the coding algorithm searches for a match when autocoding. This information appears only if the request was autocoded.
Auto Approve (A)	Indicates whether the request was autocoded and automatically approved by the application.
Auto Approve (I)	Indicates whether the request was manually coded and automatically approved by the application.
Single Coded	Indicates whether the code value was found for this request only, or if the value was propagated.
Query status icon	Indicates that the request has a query, and specifies the query state.
Note  icon	<p>Indicates that the selected coding request has a note.</p> <p>Pointing to the Note icon displays the text for each entry in the note. The note entries are sorted from newest to oldest.</p>
Number of Matches	The number of code values found. This information appears only if the request was autocoded.
Match Text	The text to which the code value was matched. This information appears only if the request was autocoded.

Request Details page—Request Information	
Field	Description
View Codes link	<p>Opens the View Full Coding dialog box, where you can view the full coding details for a coded item. The details include the dictionary name and version, the coded term and value, and the level of the dictionary hierarchy where the match was found.</p> <p>This link appears only if the request was coded.</p>

Request Details page—Request Identification	
Field	Description
Client Name	The name of the source application for which the Central Coding application is coding the request.
Client Item Identifier	A unique identifier of the source application for the item to be coded. This information comes from the source application.
Product	The product type from which the request was sent. The Central Coding application defines this property.
Host	The name of the server for the study.
URL	The URL of the page in the source application on which the request is based.
Subject ID	The source application identifier for the subject associated with the coding request. This information comes from the source application.
Site	A unique identifier for the subject site. This information comes from the source application.
SiteMnemonic	A mnemonic identifier for the subject site. This information comes from the source application.
SiteName	The SiteMnemonic, enclosed in brackets, followed by the name of the site.
Visit	A data structure that describes a subject visit or a collection of monitoring forms. This information comes from the source application.
Form Name	RefName of the form associated with the request. This information comes from the source application.
Mapping	The name of the data code mapping defined in the source application. This identifier defines the items and the location where they are returned to the source application.

Request Details page—Request Identification	
Field	Description
Route of Administration	The route by which the drug was administered. This information comes from the source application. This field appears only for items associated with the WHO-DD or JDrug dictionary.
Indication	The disease or disorder for which the drug was taken. This information comes from the source application. This field appears only for items associated with the WHO-DD or JDrug dictionary.
Target(s)	A unique identifier for where the code is sent. The number of targets that appear on the page depends on the mappings defined in the source application.

Request Details page—Rule Assignment	
Field	Description
Rule Text	The assignment rule that the application evaluates, in simple syntax language.
Assignment Status	Indicates whether the request is successfully assigned to the associated assignment rule. If the request is unassigned, an error message appears.
Assigned Work Teams	The work teams assigned to the requests processed by the assignment rule. This field appears only if the application successfully assigns the requests.

Actions

Request Details page—Coding Requests		
Action	Shortcut	Description
Code		<p>Code and propagate. Opens the Coding Browser dialog box, where you can interactively code and propagate the value for the selected verbatim.</p> <p>The application propagates the selected code value to other uncoded requests with the same verbatim, coding definition, and context information.</p> <p>The code propagates only to requests associated with unlocked studies.</p>
Review Complete	Ctrl+Shift+R	<p>Completes the review of an autocoded request. The status changes to Complete and the request is ready for approval.</p>
Clear Code		<p>Removes the code value only for the selected verbatim. Clearing the code values in the Central Coding application clears the corresponding code values in the source application.</p>
Retry Delivery		<p>Changes the delivery status for a request with a failed delivery to the source application to Completed, awaiting delivery. This allows the request to be picked up by the job queue so that it can be resent to the source application. Requires the Retry Delivery right.</p>

Request Details page—Approvals		
Action	Shortcut	Description
Approve	Ctrl+Shift+A	<p>Approve and propagate. Marks the coding approved for the selected request and for other coded requests with the same code, verbatim, coding definition, and context information.</p> <p>The approval propagates only to requests associated with unlocked studies.</p>

Request Details page—Approvals		
Action	Shortcut	Description
Disapprove	Ctrl+Shift+D	<p>Disapprove and propagate. Marks the coding disapproved for the selected request and for other coded requests with the same code, verbatim, coding definition, and context information.</p> <p>The disapproval propagates only to requests associated with unlocked studies.</p> <p>Disapproved requests are returned to the coder's queue with a coding status of Recode.</p>
Code		<p>Code and propagate. Opens the Coding Browser dialog box, where you can interactively code and propagate the value for the selected verbatim.</p> <p>The application propagates the selected code value to other uncoded requests with the same verbatim, coding definition, and context information.</p> <p>The coding propagates only to requests associated with unlocked studies.</p>
Clear Code		<p>Removes the code value only for the selected verbatim. Clearing the code values in the Central Coding application clears the corresponding code values in the source application.</p>
Retry Delivery		<p>Changes the delivery status for a request with a failed delivery to the source application to Completed, awaiting delivery. This allows the request to be picked up by the job queue so that it can be resent to the source application. Requires the Retry Delivery right.</p>

Buttons

Request Details page—Coding Requests		
Button	Shortcut	Description
Code		<p>Code and propagate. Opens the Coding Browser dialog box, where you can interactively code and propagate the value for the selected verbatim.</p> <p>The application propagates the selected code value to other uncoded requests with the same verbatim, coding definition, and context information.</p> <p>The code propagates only to requests associated with unlocked studies.</p>
Review Complete	Ctrl+Shift+R	<p>Completes the review of an autocoded request. The status changes to Complete and the request is ready for approval.</p>

Request Details page—Approvals		
Button	Shortcut	Description
Approve	Ctrl+Shift+A	<p>Approve and propagate. Marks the coding approved for the selected request and for other coded requests with the same code, verbatim, coding definition, and context information.</p> <p>The approval propagates only to requests associated with unlocked studies.</p>
Disapprove	Ctrl+Shift+D	<p>Disapprove and propagate. Marks the coding disapproved for the selected request and for other coded requests with the same code, verbatim, coding definition, and context information.</p> <p>The disapproval propagates only to requests associated with unlocked studies.</p> <p>Disapproved requests are returned to the coder's queue with a coding status of Recode.</p>

Roles page

The help for this page includes descriptions for core fields, actions, and buttons only.

Roles page	
Field	Description
Display Name	The role name to appear on the screen.
Active Users	The number of active users assigned to the role.

Schedule [Adapter Name] Job—Advanced page

The help for this page includes descriptions for core fields, actions, and buttons only.

Fields

Schedule [Adapter Name] Job—Advanced page	
Field	Description
1 to 31	Indicates the days of the months on which the job queue runs.
Every [number] minute	Indicates that the job queue runs every [number] minutes in the selected hours.

Schedule [Adapter Name] Job— Advanced page	
Field	Description
Custom	<p>Indicates that the job queue runs at the specified interval in the selected hours.</p> <p>The text must be a single value or a comma-separated list of values in the following format:</p> <ul style="list-style-type: none"> • Time (24-hour clock) to start the queue, in HH:MM format. • A dash (-). • Time (24-hour clock) to stop the queue, in HH:MM format. • The number of minutes between the last time that the queue was processed and the next time that it should be processed, as a positive integer in square brackets ([,]). <p>If the stop time is less than the start time, the stop time occurs on the day after the start time. If the start time and the stop time are the same, the time span is exactly 24 hours.</p> <p>Examples:</p> <ul style="list-style-type: none"> • 12:30-13:15[5] Process the queue every five minutes from 12:30 PM until 1:15 PM. • 23:30-3:45[10], 5:15-7:59[20] Process the queue every 10 minutes from 11:30 PM until 3:45 AM as well as every 20 minutes from 5:15 AM until 7:59 AM. <p>If time spans contain some period of time in common or overlap, and the current time matches the pattern defined in either time span, the queue will be processed.</p> <p>Example:</p> <p>7:00-13:00[4],12:00-14:00[9]</p> <p>Processes the query every day at 3 AM, every 15 minutes between 12:45 AM and 1:15 AM, and every 30 minutes between 1:00 AM and 1:15 PM.</p> <p>Between noon and 1:00 PM, processes the queue if it has been a multiple of four minutes since 7:00 AM or a multiple of nine minutes since noon.</p>
12 to 11 A.M. or P.M	Indicates the hours on the selected days on which the job queue runs.
0 to 59	Indicates the minutes when the job queue runs in the selected hours.
All	<p>Indicates that the job queue runs:</p> <ul style="list-style-type: none"> • Every minute in the selected hours. • Every hour on the selected days. • Every day in the selected months.

Buttons

Schedule [Adapter
Name] Job—
Advanced page

Button	Description
Basic	Opens the Schedule [Job Name] Job—Basic page, where you can create a job schedule based on the days of the week and time.

Schedule [Adapter Name] Job—Basic page

The help for this page includes descriptions for core fields, actions, and buttons only.

Fields

Schedule [Adapter Name] Job—Basic page	
Field	Description
Every [number] minute	Indicates that the job queue runs every [number] minutes of the selected hours.
No time span	Indicates that the job queue runs only on the selected hours.

Buttons

Schedule [Adapter Name] Job—Basic page	
Button	Description
Advanced	Opens the Schedule [Job Name] Job—Advanced page, where you can create a detailed job schedule based on months, days, and time.

[Stopword List Name] page—Edit

The help for this page includes descriptions for core fields, actions, and buttons only.

[Stopword List Name]

page—Edit

Field	Description
Parent	The name of the stopword list which the selected list inherited. This field appears only if the list is inherited.

[Stopword List Name] page—Manage stopwords

The help for this page includes descriptions for core fields, actions, and buttons only.

Fields

[Stopword List Name] page—Manage Stopwords	
Field	Description
Parent	The name of the stopword list which the selected list inherited. This field appears only if the list is inherited.

Actions

[Stopword List Name] page—Manage Stopwords	
Action	Description
New	Opens the New Stopword page, where you can add a stopword to the list.
Accept	Accepts the stopword and activates it in the stopword list.
Reject	Rejects the stopword and removes it from the stopword list after you specify a reason for the change.
Activate	Changes the state of the selected deactivated stopword to Active after you specify a reason for the change.
Deactivate	Changes the state of the selected active stopword to Inactive after you specify a reason for the change.
Promote	Adds the selected stopword in the parent stopword list. This option is available only for inherited stopword lists.
Mask	Hides the selected stopword in the parent stopword list. This option is available only for inherited stopword lists.
Unmask	Shows the selected stopword in the parent stopword list. This option is available only for inherited stopword lists.

Buttons

[Stopword List Name] page—Manage Stopwords	
Action	Description
New	Opens the New Stopword page, where you can add a stopword to the list.
Accept	Accepts the stopword and activates it in the stopword list.
Reject	Rejects the stopword and removes it from the stopword list after you specify a reason for the change.

Stopword Lists page

The help for this page includes descriptions for core fields, actions, and buttons only.

Fields

Stopword Lists page	
Field	Description
Parent Stopword List Name	The name of the stopword list which the selected list inherited. If blank, the list is not inherited.

Actions

Stopword Lists page		
Action	Shortcut	Description
Edit	Ctrl+Shift+E	Opens the [Stopword List Name] page, where you can edit the name of the stopword list.
Manage		Opens the [Stopword List Name] page, where you can view, add, accept, reject, activate, deactivate, promote, mask, and unmask the stopwords in the list.
Activate		Changes the state of the selected deactivated stopword list to Active after you specify a reason for the change.
Deactivate		Changes the state of the selected active stopword list to Inactive after you specify a reason for the change.
Delete		Removes the selected stopword list from the system. You can delete a stopword list only if it is empty and if it is not used in a coding definition.

Buttons

Stopword Lists page		
Action	Shortcut	Description
Edit	Ctrl+Shift+E	Opens the [Stopword List Name] page, where you can edit the name of the stopword list.
Activate		Changes the state of the selected deactivated stopword list to Active after you specify a reason for the change.

Study Group Detail page

The help for this page includes descriptions for core fields, actions, and buttons only.

Study Group Detail page	
Field	Description
Allow Auto Query by Default	Instructs the Central Coding application to duplicate an existing query and apply it to matching verbatims that are subsequently entered in the study group.
Allow Auto Close Query by Default	Instructs the Central Coding application to close a query if the associated verbatim is successfully coded and approved.

Study Group List page

The help for this page includes descriptions for core fields, actions, and buttons only.

Fields

Study Group List page	
Field	Description
Allow Auto Query By Default	Instructs the Central Coding application to duplicate an existing query and apply it to matching verbatims that are subsequently entered in the study group.
Allow Auto Close Query By Default	Instructs the Central Coding application to close a query if the associated verbatim is successfully coded and approved.







Buttons

Study Group List page		
Button	Shortcut	Description
Add	Ctrl+Shift+A	Opens the Study Group Detail page, where you can create a new study group.

Study Information page

The help for this page includes descriptions for core fields, actions, and buttons only.

Fields

Study Information page	
Field	Description
Study	<p>The name of the study.</p> <p>The name is an active link if your environment is integrated with the InForm application. The link opens the InForm application page for the study.</p>
Study Group	<p>The name of the study group associated with the study.</p> <p>A study group specifies auto close and auto query settings for a subset of studies. The Central Coding application includes a default study group called System.</p>
Application	The name of the application integrated with the Central Coding application.
Locked	<p>Indicates whether the study is locked () or unlocked () in the Central Coding application.</p> <p>Because requests associated with locked studies cannot have any actions performed on them, they do not appear on the Coding Requests or Approvals pages. However, they do appear on the All Requests page.</p> <p>Coding requests associated with locked studies do not appear on the Coding Requests or Approvals pages.</p>
Get Requests	<p>Adds a study to the Get Requests job schedule.</p> <ul style="list-style-type: none"> • Log ()—opens the View Job Log page, where you can view information about the Get Requests jobs for the study and associated adapter. • Run ()—manually runs the Get Requests jobs for the study and associated adapter.
Return Codes	<p>Adds a study to the Return Codes job schedule.</p> <ul style="list-style-type: none"> • Log ()—opens the View Job Log page, where you can view information about the Return Codes jobs for the study and associated adapter. • Run ()—manually runs the Return Codes jobs for the study and associated adapter.

Study Information page	
Field	Description
Study	<p>The name of the study.</p> <p>The name is an active link if your environment is integrated with the InForm application. The link opens the InForm application page for the study.</p>
Exchange Query Updates	<p>Contains information about the Exchange Query Updates jobs, and about accessing the job log and status for the associated job.</p> <ul style="list-style-type: none"> • Log (📄)—opens the View Job Log page, where you can view information about the Exchange Query Updates jobs.
Status	<p>Opens the View Job Log page, to view the status of the Delete Study and All Data action.</p>

Actions

Study Information page	
Action	Description
Reset	<p>Resets the bookmark attribute for the InForm Adapter application. The bookmark attribute is an index number that identifies the last verbatim stored in the cache.</p>
Delete Study and All Data	<p>Removes the information associated with the selected study, including requests and audit data.</p> <p>A system administrator can limit this functionality using the Delete Trial Mask field on the System Configuration page.</p>
Decommission a Study	<p>Moves request data from the current database tables to the history database tables for a study that is complete.</p>

[Synonym List Name] page—Edit

The help for this page includes descriptions for core fields, actions, and buttons only.

[Synonym List Name] page—Edit	
Field	Description
Dictionary	The coding dictionary, version, and culture associated with the synonym list.
Parent	The name of the synonym list that the selected list inherited. This field appears only if the list is inherited.
Include children?	Indicates whether to copy the child synonym lists of the selected parent synonym list. This field appears only if the list being copied is a parent synonym list.

[Synonym List Name] page—Manage synonyms

The help for this page includes descriptions for core fields, actions, and buttons only.

Fields

[Synonym List Name] page—Synonym List Information	
Field	Description
Synonym	<p>A filter that identifies the items to view based on the name of the synonym. Searches are <i>case-insensitive</i>. The search supports the special characters *, %, ?, and _.</p> <p>The search text field can be any text string and can contain wildcard characters to facilitate matching when the exact text is not known. The percent sign (%) or asterisk (*) matches any sequence of characters; the question mark (?) or underscore (_) matches any single character.</p>
Dictionary	The coding dictionary, version, and culture associated with the synonym list.
Parent	The name of the synonym list that the selected list inherited. This field appears only if the list is inherited.

[Synonym List Name] page—Synonyms	
Field	Description
Code	The classification level code value. Opens the View Full Coding dialog box, where you can view the full coding details for a coded item. The details include the dictionary name and version, the coded term and value, and the level of the dictionary hierarchy where the match was found.

Actions

[Synonym List Name] page—Manage Synonyms	
Action	Description
Accept	Accepts the proposed synonym and activates it in the synonym list.
Reject	Rejects the proposed synonym and removes it from the synonym list after you specify a reason for the change.

[Synonym List Name] page—Manage Synonyms	
Action	Description
Activate	Changes the state of the selected synonym to Active after you specify a reason for the change.
Deactivate	Changes the state of the selected synonym to Inactive after you specify a reason for the change.
Promote	Adds the selected synonym to the parent synonym list. This option is available only for inherited synonym lists.
Mask	Hides the selected synonym in the parent synonym list. This option is available only for inherited synonym lists.
Unmask	Shows the selected synonym in the parent synonym list. This option is available only for inherited synonym lists.


Buttons

[Synonym List Name] page—Manage Synonyms	
Action	Description
Accept	Accepts the proposed synonym and activates it in the synonym list.
Reject	Rejects the proposed synonym and removes it from the synonym list after you specify a reason for the change.

Synonym Lists page

The help for this page includes descriptions for core fields, actions, and buttons only.

Fields

Synonym Lists page	
Field	Description
	Indicates that there is at least one proposed synonym in the associated synonym list.
Culture	The culture setting associated with the coding dictionary.

Actions

Synonym Lists page		
Action	Shortcut	Description
Edit	Ctrl+Shift+E	Opens the [Synonym List Name] page, where you can edit the name of the synonym list.
Upgrade		Opens the Upgrade Synonym List dialog box, where you can create a new synonym list that is a copy of an existing synonym list for use in impact analysis.
View Upgrade Process		Opens the Upgrade Synonym List In Process dialog box, where you can view the status of the synonym upgrade process, initiate the synonym reconciliation process, generate the Synonym Reconciliation Report, and commit synonym changes to the database.
Activate		Changes the state of the selected synonym list to Active after you specify a reason for the change.
Deactivate		Changes the state of the selected synonym list to Inactive after you specify a reason for the change.
Delete		Removes the selected synonym list from the system. You can delete a synonym list only if it is empty and if it is not used in a coding definition.
Manage	Ctrl+Shift+M	Opens the [Synonym List Name] page, where you can view, add, accept, reject, activate, deactivate, promote, mask, and unmask the synonyms in the list.

Buttons

Synonym Lists page		
Action	Shortcut	Description
Edit	Ctrl+Shift+E	Opens the [Synonym List Name] page, where you can edit the name of the synonym list.
Activate	Ctrl+Shift+A	Changes the state of the selected synonym list to Active after you specify a reason for the change.

[Synonym Name] page

The help for this page includes descriptions for core fields, actions, and buttons only.

Fields

[Synonym Name] page—Synonym List Information	
Field	Description
Dictionary	The coding dictionary, version, and culture associated with the synonym list.
Parent	The name of the synonym list that the selected list inherited. This field appears only if the list is inherited.

[Synonym Name] page—Synonym	
Field	Description
Code	The classification level code value. Opens the View Full Coding dialog box, where you can view the full coding details for a coded item. The details include the dictionary name and version, the coded term and value, and the level of the dictionary hierarchy where the match was found.

Actions

[Synonym Name] page	
Action	Description
Code	Opens the Coding Browser dialog box, where you can interactively code the proposed synonym.

Buttons

[Synonym Name] page	
Button	Description
Code	Opens the Coding Browser dialog box, where you can interactively code the proposed synonym.

System Configuration page

The help for this page includes descriptions for core fields, actions, and buttons only.

User migration options are available only for environments upgraded from a Central Coding release prior to 3.1 and migrated to Oracle SSO authentication.

System Configuration page—User Migration Options

Field	Description
Failed logon limit	Number of times a user can try to enter valid credentials when prompted to link an existing user account with an SSO user account. When the number is exceeded, the user cannot be migrated for a period of time specified in the Failed migration lock timeout field.
Failed migration lock timeout	Period of time for which an existing user account cannot be migrated to the SSO environment after the number of attempts specified in the Failed logon limit field is exceeded. When the time interval expires, the user account can be migrated again. The time must be in hh:mm:ss format. For example, 00:15:00 for 15 minutes.
Allow User Migration	<p>Indicates whether to allow existing users to be migrated from the previous environment with native authentication to the new environment with SSO authentication.</p> <ul style="list-style-type: none"> • If selected, when logging in for the first time after the environment is migrated, each user is prompted to link the existing account with the new SSO account. When the user accounts are linked, the user is migrated and Central Coding transfers role and work team assignments to the SSO environment. • If deselected, user accounts cannot be migrated to the Oracle SSO environment. <p>It is recommended to keep the option selected until all or most existing users are migrated the Oracle SSO environment.</p>

System Configuration page—Application Settings

Field	Description
Show Non Current Terms During Browser Search	Indicates whether to display non-current terms and codes from the selected dictionary in the coding browser during a search.

System Configuration page—Application Settings	
Field	Description
Date Format	<p>The date format to use for data entry fields in the user interface and in the Audit History Report. The default setting depends on the operating system.</p> <ul style="list-style-type: none"> • English OS—DD/MON/YYYY HH24:MI:SS • Japanese OS—YYYY/MON/DD HH24:MI:SS <p>The Central Coding user interface supports a single format for data display.</p> <p>Partial or imprecise dates must include the year.</p>
Display Context Items on Coding Requests and Approvals pages	<p>Indicates whether to display the first 25 characters of the context items (Indication and Route of Administration) associated with a verbatim on the Coding Requests page, the Approvals page, the Unassigned Requests page, and the All Requests page.</p> <p>Only verbatims coded against the WHO-DD or JDrug dictionary have context items.</p>
Request List View Column Length	<p>Sets the width of some columns on the list view pages to prevent a forced break between Japanese characters.</p> <p>This setting increases the width of the columns that appear to the right of the Code column when you use the View filter to view the requests for a coding definition on the Coding Requests, Approvals, Unassigned Requests, and All Requests pages.</p> <p>This setting affects the list views only when you are using a Japanese operating system or an English operating system with a Global locale (the system accepts both English and Japanese verbatims).</p>
Delete Study Mask	<p>Specifies the set of characters that appears in the name of the studies that can be completely deleted. The default is UAT.</p> <p>This setting limits the type of study that you can delete using the Delete Study and All Data option on the Study Information page.</p> <p>The information associated with the specified type of studies, such as requests and audit data, is also removed.</p>
Show Delete Request After Delivery Option	<p>Indicates whether to display the Delete request after delivery option on the [Assignment Rule Name] page.</p>
Delete Request Audit Information	<p>Indicates whether to delete the audit information from the database tables for delivered requests that were deleted using the Delete request after delivery option on the [Assignment Rule Name] page.</p>

System Configuration

page—Application
Settings

Field	Description
Lock expiration	<p>The length of time after which a system lock expires. The time must be in hh:mm:ss format. For example, 23:59:30.</p> <p>After a user is done with an object, the Central Coding application releases it. However, if an operation is not completed (for example, if a user closes the browser or walks away, or an error occurs) the system releases the lock at the lock expiration time.</p>

Authentication options are available only for environments with native authentication.

System Configuration

page—Authentication
Options

Field	Description
Authentication inactivity timeout	<p>The period of inactivity after which a user session times out. The default is 20 minutes. The time must be in hh:mm:ss format. For example, 00:30:00 for 30 minutes.</p> <p>After the session times out, a user must log in again. After re-authenticating, the user is redirected to the page that was displayed before the session timed out. Any unsaved data is preserved.</p>
Authentication expiration	<p>The length of time after which a user session times out. The default is 4 hours. The time must be in hh:mm:ss format. For example, 05:00:00 for 5 hours.</p> <p>After the session times out, a user must log in again. After re-authenticating, the user is redirected to the page that was displayed before the session timed out. Any unsaved data is preserved.</p>
Failed logon limit	<p>The number of times a user can try to log in before being locked out of the application. The default value is 3.</p> <p>If the retry attempts exceed this value, the user account is marked as Inactive. The user is not allowed to access the application, and a record of the failed login attempt is recorded in an audit log.</p>
Authentication token duration	<p>The length of time the user login is valid. The default is 10 hours. The time must be in hh:mm:ss format. For example, 09:00:00 for 9 hours.</p> <p>This field specifies the duration for which a security token is valid after a user successfully enters the user name and password. When the duration has passed, the security token is considered to have expired.</p> <p>This value is used in the communication between the Central Coding and InForm Adapter applications. It does not affect the user interface.</p>

System Configuration page—Authentication Options	
Field	Description
Authentication token renew duration	<p>Specifies the duration that a previously created security token can be renewed for without requiring a user to re-enter the user name and password. The default is 7 days. The time must be in dd:hh:mm:ss format. For example, 10:00:00:00 for 10 days.</p> <p>When a security token expires because the duration specified in the Authentication token duration field has elapsed, it is renewed for this duration.</p> <p>This value is used in the communication between the Central Coding and InForm Adapter applications. It does not affect the user interface.</p>
Authentication token clock slush	<p>The number of minutes the server clocks for the Central Coding and InForm Adapter application servers can be out of sync. The default is 5 minutes, indicating that a token is accepted if the server clock is within 5 minutes of the server that issued the token. The time must be in hh:mm:ss format. For example, 00:10:00 for 10 minutes.</p> <p>This value is used in the communication between the Central Coding and InForm Adapter applications. It does not affect the user interface.</p>
Password expiration	<p>The length of time that a password is valid. The default is 30 days. The time must be in the format dd:hh:mm:ss. For example, 60:00:00:00 for 60 days.</p> <p>The system checks if the password has expired when establishing the user session. If the password has expired, the user is denied access to the system, notified of the expiration, and prompted to enter the existing password, a new password, and confirmation of the new password.</p>
Minimum length of password	<p>The minimum number of characters for a password. The default is 6 alphanumeric characters.</p>
Super user logout timeout	<p>Amount of consecutive inactive time before a session timeout occurs for a super user. The time must be in the format hh:mm:ss. For example, 01:00:00 for 1 hour.</p>
Non-Super user logout timeout	<p>Time interval after which the system unlocks a regular user account. For migrated users, the time before the user can reattempt to login as an existing user. The time must be in the format hh:mm:ss. For example, 00:30:00 for 30 minutes.</p>

System Configuration page—Authentication Options	
Field	Description
Password complexity requirement	<p>Number of additional requirements a password must meet, as well as the specified minimum length for conformance.</p> <ul style="list-style-type: none"> • A mix of one or more of both alphabetical (A-Z, a-z) and numeric (0-9) characters. • At least one non-alphanumeric character (` ~ ! @ # \$ % ^ & * () _ + - = { } [] \ : " ; ' < > ? , . /). • A mix of at least one or more characters of both alphabetical upper case [A-Z] and lower case [a-z].
Password reuse limit	<p>Number of previous passwords that cannot be reused. The default is 3. For example, when users change their passwords, they cannot set them to any of the last 3 passwords used.</p>

System Configuration page—Impact Analysis Options	
Field	Description
Reassociate Synonym	<p>Indicates whether synonyms are automatically or manually reassociated to Low Level Terms (LLTs) in a new MedDRA dictionary version.</p> <p>If selected, synonyms associated with Low Level Terms (LLTs) that are non-current in the new dictionary version are reassociated to a:</p> <ul style="list-style-type: none"> • Current Low Level Term (LLT), where possible. • Preferred Term (PT). • Low Level Term (LLT) that has the same code and term as the Preferred Term (PT). <p>If not selected, you must manually reconcile or delete the synonyms.</p>
Set Delete Synonym as Default	<p>Indicates whether unused synonyms are deleted when you approve changes on the Reconcile Synonyms page. The choice saves a step during the synonym reconciliation process.</p> <p>If selected, the Delete option in the Action column on the Reconcile Synonyms page is also selected.</p>
Allow Uncode	<p>Indicates whether users have the option to reject the code and term from the original or the new coding dictionary, and to return the verbatim to the coder's queue.</p> <p>If selected, the Uncode option in the Accept Uncode column is available to users on the Reconcile Verbatims page.</p>

System Configuration page—Impact Analysis Options	
Field	Description
Skip Auto Suggestion Step	Indicates whether to skip the Auto Suggestion step in the coding algorithm and search for a possible better choice.

System Configuration page—Query Management Options	
Field	Description
Query Create User in Client	<p>A user in the InForm application with rights to create queries. The user name appears in the InForm application as the user who created the Central Coding queries for each study in the InForm application.</p> <p>In an Oracle SSO environment:</p> <ul style="list-style-type: none"> For SSO-enabled InForm studies, the user name format is <i>organization_ID.username</i>. This field is case-sensitive and must match the InForm name exactly. For all other studies, the account name is the user name only. <p>You can define a Query Create User separately for a study by entering InForm query user information on the Study Information Page.</p>
Maximum Query Reason Length	<p>The maximum number of characters a user can enter in the Reason field in the Create Query dialog box and in the Standard Reason field on the Add [Action Type] Query Standard Reason page.</p> <p>This setting also applies to the standard query reasons an administrator sets on the Query Default Reason List page. The default is 255 characters.</p> <p>Oracle recommends configuring this setting to match the maximum number of characters allowed in the version of the InForm application which is integrated with the Central Coding application.</p>
Allow Multiple Query Reissue	Allows a query to be reissued multiple times.

System Configuration page—Get/Put Job Options	
Field	Description
GetRequests Job Chunk Size	Number of requests to retrieve from the source application in each web service call to the InForm Adapter application. The chunks run sequentially, and each job continues to process until all requests have been retrieved from the source application.
ReturnCodes Job Chunk Size	Number of requests to return to the source application in each web service call to the InForm Adapter application. The chunks run sequentially, and each job continues to process until all requests have been delivered to the source application.
Web Service Client Timeout	The amount of time (in milliseconds) to wait for the web service response before the web service client times out.
InForm Authentication User and InForm Authentication User Password	<p>The user name and password of an InForm application user created to communicate with the InForm server through web services.</p> <p>The specified user:</p> <ul style="list-style-type: none"> • Is required only when username/password authentication is selected on the Adapter page for calls to the InForm Adapter Coding and Discrepancy interfaces. • Should have no additional rights in the InForm application. • Should be different from the transaction users specified in the PutCodes Client Audit User and Query Create User in Client fields. <p>The InForm authentication user details are:</p> <ul style="list-style-type: none"> • Valid only when both fields contain values. • Used either for all studies or for the studies associated with a specific adapter. <p>The InForm Authentication User field is case-sensitive.</p> <p>You can define an InForm Authentication User separately for a study by entering InForm authentication user information on the Study Information Page.</p>
Authentication Certificate Name	Contains the name of the authentication certificate used for signing InForm Adapter web service messages when certificate authentication is used on the Adapter configuration page.

Term Changes page

This page is used for impact analysis.

The help for this page includes descriptions for core fields, actions, and buttons only.

Fields

Term Changes page	
Field	Description
Change	<p>The change made to the dictionary term.</p> <ul style="list-style-type: none"> • Add—The term was added to the dictionary. • Delete—The term was deleted from the dictionary. • Non-current—The term is not current in the dictionary (MedDRA only). • Update—The term was updated in the dictionary.

Actions

Term Changes page	
Action	Description
Export	Exports the list of changes in a Comma-Separated Value (CSV) file.

Buttons

Term Changes page	
Button	Description
Export	Exports the list of changes in a Comma-Separated Value (CSV) file.

Unassigned Requests page

The help for this page includes descriptions for core fields, actions, and buttons only.

Unassigned Requests page	
Field	Description
Verbatim	<p>The original reported text that describes the adverse event, disease, drug, or other item to be coded. This information comes from the source application.</p> <p>In a self-hosted environment, the first 25 characters of the context items (Indication and Route of Administration) associated with the verbatim appear below the verbatim if the Display Context Items on Coding Requests and Approvals pages option is selected on the System Configuration page.</p>
Site	A unique identifier for the subject site. This information comes from the source application.
Study	<p>The name of the study.</p> <p>The name is an active link if your environment is integrated with the InForm application. The link opens the InForm application page for the study.</p>
Form Name	RefName of the form with which the request is associated. This information comes from the source application.
Subject ID	A source application identifier for the subject associated with the coding request. This information comes from the source application.
Received	The date that the Central Coding application received the coding request.

Upgrade Coding Definition dialog box

This page is used for impact analysis.

Use the Upgrade Coding Definition dialog box to create a new coding definition by upgrading an existing one. The Central Coding application displays the data for the selected coding definition in the Original column.

The help for this page includes descriptions for core fields, actions, and buttons only.

Upgrade Coding Definition dialog box	
Field	Description
Coding Definition Name	The name of the new coding definition.
Dictionary Version	The dictionary version to associate with the new coding definition. You can upgrade only to a new dictionary version of the same type and culture.
Synonym List	The synonym list to associate with the new coding definition.
Update assignment rules with new coding definition	Reassigns the assignment rules for the original coding definition to the new coding definition.
Copy assignment rules and use new coding definition	Copies the assignment rules for the original coding definition to the new coding definition. The original assignment rules continue to assign requests to the original coding definition.
No changes to assignment rules	Continues to assign requests to the original coding definition. You must create and use new assignment rules for the new coding definition.

Upgrade Synonym List dialog box

This page is used for impact analysis.

Use the Upgrade Synonym List dialog box to create a new synonym list by upgrading an existing one. The Central Coding application displays the data for the selected synonym list in the Original column.

The help for this page includes descriptions for core fields, actions, and buttons only.

Upgrade Synonym List dialog box	
Field	Description
Synonym List	The name of the new synonym list. This field has a default value if the selected synonym list was already upgraded to the selected Dictionary Version.
Parent Synonym List	The name of the synonym list from which the selected synonym list is inherited. If blank, the list is not inherited.
Dictionary Version	The dictionary version to associate with the new synonym list. You can upgrade only to a new dictionary version of the same type and culture.
Auto Reconcile Term Capitalization Differences	Autoreconciles the capitalization in different WHO-DD dictionary versions so the Preferred Term for coded verbatims exactly matches the capitalization of the Preferred Name for the WHO-DD format.

Upgrade Synonym List In Process page

This page is used for impact analysis.

The help for this page includes descriptions for core fields, actions, and buttons only.

Fields

Upgrade Synonym List In Process page	
Field	Description
Source Name	The original synonym list.
Source Type	The dictionary type associated with the original synonym list.
Source Culture	The culture of the dictionary associated with the original synonym list.
Source Version	The version of the dictionary associated with the original synonym list.
Target Name	The new synonym list.
Target Version	The dictionary version associated with the new synonym list.
Step	The current processing step of the synonym list upgrade.
Status	The current status of the processing step.
Error	Descriptive information about a synonym list upgrade that did not run successfully.
Report	A link to the Document Viewer page, where you can view the results of the selected report in Rich Text Format (RTF).

Actions

Upgrade Synonym List In Process page		
Action	Shortcut	Description
Cancel		Stops a synonym list upgrade that is in process. The Central Coding application deletes the data and associated reports.
Rerun		Reruns the synonym list upgrade for the selected synonym list if the status is Failed.
Reconcile	Ctrl+Shift+R	Opens the Reconcile Synonyms page, where you can reconcile the synonym differences between dictionary versions. This action is available only when there are synonyms to reconcile.
Update	Ctrl+Shift+U	Saves approved verbatim changes to the database. You cannot undo this action.

Buttons

Upgrade Synonym List In Process page		
Button	Shortcut	Description
Generate Report	Ctrl+Shift+G	Runs the Synonym Reconciliation Report, which records the status of the synonym upgrade and reconciliation process.
Reconcile	Ctrl+Shift+R	Opens the Reconcile Synonyms page, where you can reconcile the synonym differences between dictionary versions. This button is available only when there are synonyms to reconcile.
Update	Ctrl+Shift+U	Saves approved verbatim changes to the database. You cannot undo this action.

Users page

The help for this page includes descriptions for core fields, actions, and buttons only.

Fields

Users page	
Field	Description
Name	The system login name for the user.
Display Name	The screen name for the user. The display name appears in the upper-left corner of the user interface.

Actions

Users page	
Action	Description
Unmigrate	<p>Resets the migration status for a user. Use when a user was assigned one or more roles in an environment migrated to SSO authentication before the user linked the account from the former environment to the Oracle SSO account. Unmigrating allows the user to link the two accounts at the next login attempt.</p> <p>The user must not be logged in.</p> <p>For Oracle SSO environments only.</p>

View Full Coding dialog box

The help for this page includes descriptions for core fields, actions, and buttons only.

View Full Coding dialog box	
Field	Description
Coded With	The dictionary and version number the item was coded against.
Is Primary Path	Indicates whether the code was found in the primary dictionary path. This field appears only when using the MedDRA or MedDRA-J dictionary. The WHO-DD, JDrug, and custom dictionaries do not support the primary path concept.
Level	The hierarchy level in the specified dictionary. For WHO-DD and MedDRA dictionaries, the Preferred Term, High Level Term, and High Level Group Term details also appear.
Term	The first coded term from the dictionary level.

View Job Log/Update Codes [Coding Definition Name] page

The help for this page includes descriptions for core fields, actions, and buttons only.

View Job Log/Update Codes [Coding Definition Name] page	
Field	Description
Job	A filter that identifies the data to view based on the Job Name.
Start date after	The start date (DD-MON-YYYY) of the period for which to view the job log.
End date before	The end date (DD-MON-YYYY) of the period for which to view the job log.
Job Name	A system-generated identifier for the job.
Progress	General information about a job in progress. <ul style="list-style-type: none"> • While getting verbatims, displays In Process. • While returning codes, displays the percentage of completed requests.
Error	Descriptive information about a synonym list upgrade that did not run successfully.

View Medicinal Product Information dialog box

This functionality is available only when you are coding to the Trade Name level in the WHO-DD dictionary.

The help for this page includes descriptions for core fields, actions, and buttons only.

View Medicinal Product Information dialog box	
Field	Description
Name Specifier	Additional information used to distinguish medicinal products with the same Medicinal Product name.
MA Holder	Company with the license or marketing authorization for the medicinal product in a given country.
Company	Name of the company that owns the medicinal product.
ICH Med Prod ID	Unique identifier in the WHO-DD dictionary for the medicinal product.
Sequence Number 3	Numeric identifier for the medicinal product base substance.
Sequence Number 4	Numeric identifier for the medicinal product Preferred Name or Trade Name.
MA Number	Unique identifier for the marketing authorization for the medicinal product.
MA Date	Date when the marketing authorization was issued.
Pharmaceutical Product	Additional information for a product that is packaged with the medicinal product.

View Path Changes Detail dialog box

This page is used for impact analysis.

The help for this page includes descriptions for core fields, actions, and buttons only.

View Path Changes Detail dialog box	
Field	Description
P	Indicates whether the path is the primary path for the dictionary. This information appears only for the MedDRA or MedDRA-J dictionary.

Work Teams page

The help for this page includes descriptions for core fields, actions, and buttons only.

Work Teams page

Field	Description
Assigned Work Items	The number of requests assigned to the work team.

APPENDIX B

Default roles and rights

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Default roles

The following tables list the rights assigned to the default roles for each category of rights.

Approval	
Default rights	Default roles
Approve Coding	Approver
Force Close Query	
Manage Auto Queries	Approver
Manage Query Standard Reasons	Approver, Oracle Services Consultant
Reconcile Synonyms	Approver, Oracle Services Consultant
Reconcile Verbatims	Approver, Oracle Services Consultant
Reissue Query	Approver
View Approval Request	Approver

Coding	
Default rights	Default roles
Add Auto Queries	Coder
Clear Code	Coder
Code Approved Request	Approver, Coder
Code Delivered Request	Approver, Coder
Code Request	Coder
Code Single	Approver, Coder
Issue Candidate Query	
Issue Open Query	Approver, Coder
Propose Synonyms	Coder
Retry Delivery	Approver, Coder
Review Query Listing	Approver, Coder
Submit Auto Suggestion	Coder
View Coding Request	Coder

Reporting	
Default rights	Default roles
Produce Report	Reporter, Oracle Services Consultant

Reporting	
Default rights	Default roles
View Report	Reporter, Oracle Services Consultant

Request Setup	
Default rights	Default roles
Accept Stopwords	Dictionary Manager, Oracle Services Consultant
Accept Synonyms	Approver, Dictionary Manager, Oracle Services Consultant
Activate Algorithms	Dictionary Manager, Oracle Services Consultant
Activate Stopword Lists	Dictionary Manager, Oracle Services Consultant
Activate Stopwords	Approver, Dictionary Manager, Oracle Services Consultant
Activate Synonym Lists	Dictionary Manager, Oracle Services Consultant
Activate Synonyms	Approver, Dictionary Manager, Oracle Services Consultant
Edit Algorithms	Dictionary Manager, Oracle Services Consultant
Edit Assignment Rules	System Administrator, Oracle Services Consultant
Edit Coding Definition Element Configuration	Dictionary Manager, Oracle Services Consultant
Edit Coding Definitions	Dictionary Manager, Oracle Services Consultant
Edit Dictionary Version Element Configuration	Dictionary Manager, Oracle Services Consultant
Edit Stopword Lists	Approver, Dictionary Manager, Oracle Services Consultant
Edit Stopwords	Approver, Dictionary Manager, Oracle Services Consultant
Edit Synonym Lists	Approver, Dictionary Manager, Oracle Services Consultant
Edit Synonyms	Approver, Dictionary Manager, Oracle Services Consultant
Manage Auto Suggestions	Approver, Dictionary Manager, Oracle Services Consultant
Reset Element Configuration	Dictionary Manager, Oracle Services Consultant
Run Impact Analysis	Dictionary Manager, Oracle Services Consultant
View Algorithms	Dictionary Manager, Oracle Services Consultant
View Coding Definitions	Dictionary Manager, Oracle Services Consultant

Request Setup	
Default rights	Default roles
View Dictionaries	Approver, Dictionary Manager, Oracle Services Consultant
View Request Setup	Approver, System Administrator, Oracle Services Consultant
View Stopwords	Approver, Dictionary Manager, Oracle Services Consultant
View Synonyms	Approver, Dictionary Manager, Oracle Services Consultant

System Administration	
Default rights	Default roles
Cancel Request	Coder
Edit Request Work team Assignment	System Administrator, Oracle Services Consultant
Edit System Configuration	System Administrator, Oracle Services Consultant
Manage Job Queues	System Administrator, Oracle Services Consultant
Manage Object Lock	System Administrator, Oracle Services Consultant
Manage Study Lock	System Administrator, Oracle Services Consultant
View Administration	System Administrator, User Administrator, User Manager, Oracle Data Entry Team, Oracle Services Consultant
View All Requests	System Administrator, Oracle Services Consultant
View Audit History	System Administrator, Oracle Services Consultant
View Job Queues	Approver, System Administrator
View Object Lock	System Administrator, Oracle Services Consultant
View Study Lock	System Administrator, Oracle Services Consultant
View System Configuration	System Administrator, Oracle Services Consultant
View System Information	System Administrator, Oracle Services Consultant

User Administration	
Default rights	Default roles
Activate User	User Manager, Oracle Data Entry Team
Create Role	User Administrator, Oracle Data Entry Team
Create User	User Administrator, Oracle Data Entry Team

User Administration	
Default rights	Default roles
Create Work Team	User Administrator, Oracle Data Entry Team
Deactivate User	User Manager, Oracle Data Entry Team
Delete Role	User Administrator, Oracle Data Entry Team
Delete Work Team	User Administrator, Oracle Data Entry Team
Manage Users	System Administrator, User Administrator, User Manager, Oracle Data Entry Team, Oracle Services Consultant
Terminate User	User Manager, Oracle Data Entry Team
Update Role	User Administrator, User Manager, Oracle Data Entry Team
Update User	User Administrator, User Manager, Oracle Data Entry Team
Update Work Team	User Administrator, User Manager, Oracle Data Entry Team

Default rights

The following rights are not included in any default role:

- View Job Queues.
- Issue Candidate Query.
- Force Close Query.

Approval	
Default right	Description
Approve Coding	Mark a coded verbatim as Approved.
Force Close Query	Mark a query in any state as Closed. A query should be forced closed only when there is an irresolvable conflict between the Central Coding application and the InForm application. The query closes only in the Central Coding application. Oracle recommends that you assign this right to a limited number of users, and that you use it as infrequently as possible.
Manage Auto Queries	Manage the verbatims for which a query is automatically created in the Central Coding application.
Manage Query Standard Reasons	Create and modify the default reasons that appear in the Reason drop-down list in the Create Query, Close Query, Reissue Query, and Delete Query dialog boxes.
Reconcile Synonyms	Reconcile the synonym differences between dictionary versions after you run impact analysis.
Reconcile Verbatims	Reconcile the verbatim differences between dictionary versions after you run impact analysis.
View Approval Request	Approve the code and term assignments for verbatims manually.

Coding	
Default right	Description
Add Auto Queries	Add a verbatim query entry to the auto query list.
Clear Code	Remove the code and term assigned to a verbatim in the Central Coding application. Clearing the code values in the Central Coding application clears the corresponding code values in the source application.
Code Approved Request	Recode a verbatim that has been coded but not yet delivered to the InForm application.
Code Delivered Request	Recode a verbatim that has been coded and delivered to the InForm application.

Coding	
Default right	Description
Code Request	Assign a code and term to a verbatim, and propagate the coding to all matching verbatims.
Code Single	Assign a code and term to a single verbatim.
Issue Candidate Query	Create a Candidate query, which a Central Coding user with the appropriate rights will assign to the Open or Deleted state.
Issue Open Query	Create an Open query, which will be propagated to matching verbatims in the coding request list.
Propose Synonyms	Recommend a term and code that the Central Coding application should assign to all instances of the verbatim for which you suggest the synonym.
Retry Delivery	Select verbatims that are marked Undeliverable to retry the delivery of the codes and terms to the source application.
Review Query Listing	View the Queries page.
Submit Auto Suggestion	Enable the auto-suggestion feature in the coding browser.
View Coding Request	View the list of coding requests assigned to your work teams.

Reporting	
Default right	Description
Produce Report	Produce reports and exports.
View Report	View report outputs.

Request Setup	
Default right	Description
Accept Stopwords	Approve proposed stopwords.
Accept Synonyms	Approve proposed synonyms.
Activate Algorithms	Activate algorithms that have been modified or added.
Activate Stopword Lists	Activate stopword lists that have been modified or added.
Activate Stopwords	Activate stopwords that have been modified or added.
Activate Synonym Lists	Activate synonym lists that have been modified or added.
Activate Synonyms	Activate synonyms that have been modified or added.
Edit Algorithms	Edit coding algorithms. To edit algorithms, you must have both the Edit Algorithms right and the View Algorithms right.
Edit Assignment Rules	Modify existing assignment rules, which are used to filter coding requests among defined coding definitions.

Request Setup	
Default right	Description
Edit Coding Definition Element Configuration	Edit the element configuration settings at the coding definition level.
Edit Coding Definitions	Edit coding definitions by selecting the dictionary, synonym list, stopword list, and algorithm for the coding definition.
Edit Dictionary Version Element Configuration	Edit the element configuration settings at the dictionary level.
Edit Stopword Lists	Modify stopword lists.
Edit Stopwords	Modify stopwords.
Edit Synonym Lists	Modify synonym lists.
Edit Synonyms	Modify synonyms.
Manage Auto Suggestions	Allow users to review and remove autocoding suggestions from the list for a specific coding dictionary.
Reset Element Configuration	Reset the element configuration settings back to the default selections at the coding definition level.
Run Impact Analysis	Run impact analysis to evaluate terms and code assignments against a new dictionary version, reconcile any differences, and report the differences between dictionary versions.
View Algorithms	View coding algorithms. To edit algorithms, you must have both the Edit Algorithms right and the View Algorithms right.
View Coding Definitions	View the list of coding definitions. To view the element configuration at the coding definition level, you must also have the Edit Coding Definition Element Configuration right.
View Dictionaries	View the list of installed dictionaries. To view the element configuration at the dictionary level, you must also have the Edit Dictionary Version Element Configuration right.
View Stopwords	View the stopwords in a stopword list.
View Synonyms	View the synonyms in a synonym list.
System Administration	
Default right	Description
Edit Request Work team Assignment	Modify the work team assignment for a request.
Edit System Configuration	Edit preferences that affect the system. For example, password expiration, date format, maximum query length.
Manage Job Queues	Stop jobs, delete jobs, and review job status.

System Administration	
Default right	Description
Manage Object Lock	View locked objects and revoke a lock if required.
Manage Study Lock	View locked studies and revoke a lock if required.
View Administration	View administrative settings. To view specific settings, you must have additional rights.
View All Requests	View coding requests regardless of assignment rules.
View Audit History	View the audit history on the All Requests page.
View Job Queues	View the status of jobs.
View Object Lock	View object lock information.
View Study Lock	View study lock information.
View System Configuration	View the authentication, application, lock management, and impact analysis configuration options.
View System Information	View version information for the Central Coding product, the Oracle database, and the Windows system. You can also view copyright information for the software products used with the Central Coding application.

User Administration	
Default right	Description
Activate User	Activate a user in the Central Coding application.
Create Role	Create a new role.
Create User	Create a new user.
Create Work Team	Create a work team.
Deactivate User	Deactivate a user.
Delete Role	Delete a role.
Delete Work Team	Delete a work team.
Manage Users	Perform actions on users such as activating and terminating user accounts, assigning rights and roles to users, and assigning users to work teams. To create users, you must also have the Create User right. To update user information, you must also have the Update User right. To activate the user you create, you must also have the Activate User right.
Terminate User	Permanently terminate a user's access to the Central Coding application.
Update Role	Add new rights to a role. To update a role, you must also have the Create Role right.
Update User	Update user information. To activate a user, you must also have the Activate User right.

User Administration	
Default right	Description
Update Work Team	Update the name of a work team and modify work team assignments.

APPENDIX C

Verifying and updating codes

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About the Verify Codes report

Use the Verify Codes report to see the results of updating the codes for requests coded against a new dictionary.

The Central Coding application generates data for the Verify Codes report when a user performs the Update and Verify Codes action. This action is similar to impact analysis, save for the preliminary dictionary version comparison. For more information, see *Running impact analysis* (on page 110).

Generating the Verify Codes report

- 1 Select a new dictionary value for one or more coding definitions using the descriptions in *Editing a coding definition* (on page 78).
- 2 Select **Coding Setup > Coding Definitions**.
The Coding Definitions page appears.
- 3 Select the same coding definition or coding definitions.
- 4 Select **Actions > Verify and Update Codes** to create data for the report.
A dialog confirmation box appears.
- 5 Click **OK**.

Viewing the Verify Codes report

- 1 Select **Reports**.
The Report Requests page appears.
- 2 Filter the list of requests using the available fields.
 - In the **Report Type** filter field, select **Verify Codes Report**.
 - In the **Status** filter field, select **Produced**.The page refreshes.
- 3 Select a report.
- 4 Click the **View Results** button.

Viewing the Verify and Update job log

You can view the log for details on a previously run Verify and Update job.

- 1 Select **Coding Setup > Coding Definitions**.
The Coding Definitions page appears.
- 2 Select a coding definition.
- 3 Select **Actions > View Verify and Update Job Log**.

About the documentation

Where to find the product documentation

The product documentation is available from the following locations:

- **My Oracle Support** (<https://support.oracle.com>)—*Release Notes* and *Known Issues*.
- **Oracle Technology Network** (<http://www.oracle.com/technetwork/documentation/hsgbu-154445.html>)—The most current documentation set, excluding the *Release Notes* and *Known Issues*.

If the software is available for download, the complete documentation set is available from the Oracle Software Delivery Cloud (<https://edelivery.oracle.com>).

All documents may not be updated for every Central Coding release. Therefore, the version numbers for the documents in a release may differ.

Documentation accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

Documentation

Document	Description	Part number	Last updated
<i>Release Notes</i>	This document provides information about system requirements and descriptions of new features, enhancements, and bug fixes for the current release.	E69155-01	3.1
<i>Known Issues</i>	This document provides information about known issues for the current release, along with workarounds, if available.	E69154-01	3.1
<i>Secure Configuration Guide</i>	This document provides an overview of the security features of the application, along with details about how to install, configure, and use the Central Coding application securely.	E69158-01	3.1
<i>Installation Guide</i>	This document provides an architectural overview of the Central Coding application, a description of system requirements, and step-by-step instructions for installing, uninstalling, managing and upgrading the Central Coding software.	E69159-01	3.1
<i>User Guide</i>	This document provides an overview of the Central Coding application, descriptions of all system functions, and step-by-step instructions for using and configuring the Central Coding application.	E69156-01	3.1
<i>Quick Start for Coders and Approvers</i>	This document provides a brief overview of the main tasks that coders and approvers perform in the Central Coding application, including step-by-step instructions for coding and approving requests.	E69161-01	3.1
<i>Third Party Licenses and Notices</i>	This document provides details about licenses and notices for third party technology that may be included in or distributed with the Central Coding application.	E69160-01	3.1

Note: If your environment is integrated with the InForm application, in addition to the items in the Central Coding documentation set, you must refer to the InForm Adapter *Installation Guide* for information about installing the InForm Adapter software.