

# Oracle® Health Sciences Central Coding User Guide



Release 7.0  
F55389-01



Copyright © 2019, 2022, Oracle and/or its affiliates.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs (including any operating system, integrated software, any programs embedded, installed or activated on delivered hardware, and modifications of such programs) and Oracle computer documentation or other Oracle data delivered to or accessed by U.S. Government end users are "commercial computer software" or "commercial computer software documentation" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, reproduction, duplication, release, display, disclosure, modification, preparation of derivative works, and/or adaptation of i) Oracle programs (including any operating system, integrated software, any programs embedded, installed or activated on delivered hardware, and modifications of such programs), ii) Oracle computer documentation and/or iii) other Oracle data, is subject to the rights and limitations specified in the license contained in the applicable contract. The terms governing the U.S. Government's use of Oracle cloud services are defined by the applicable contract for such services. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle, Java, and MySQL are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Inside are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Epyc, and the AMD logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

# Contents

## Preface

---

Documentation accessibility	xiv
Related resources	xiv
Diversity and Inclusion	xiv
Access to Oracle Support	xiv
Additional copyright information	xv

## Part I User Tasks

---

### 1 Getting Started

---

Launching the application	1-1
Logging into the application	1-1
Link your Oracle Health Sciences Identity and Access Management Service and Federated accounts	1-2
Logging out of the application	1-3
Viewing your account profile	1-3
Changing your password	1-3
Changing your password in an SSO environment	1-3
Changing your password in an SSO environment with a Federated account	1-4
Changing your password in an environment with native authentication	1-4
Getting started in an environment migrated to Oracle SSO authentication	1-4
Setting the list page size	1-5
Getting help	1-5
Support for character types	1-5

### 2 Coding details

---

About coding details	2-1
Viewing coding requests	2-1
Viewing the details of a coding request	2-1
Viewing the full coding details for a coded request	2-1

Viewing the synonyms for a code	2-2
Viewing Medicinal Product information	2-2

### 3 Coding

---

About coding	3-1
About autocoding	3-1
Reviewing an autocoded request	3-2
About interactive coding	3-2
Coding browser	3-2
Coding modes	3-3
Coding methods	3-3
Coding a single item	3-3
Coding an item and propagating the value	3-4
Suggesting a synonym	3-5
Clearing code values	3-5

### 4 Queries

---

About queries	4-1
Viewing queries and their status	4-2
Viewing the audit history for a query	4-2
Creating a query from the Coding Requests or Approvals page	4-2
Creating a query from the coding browser	4-2
Reissuing a query	4-3
Retrying a query delivery	4-4

### 5 Notes and flags

---

About notes	5-1
Adding a note to a request	5-1
Viewing note details for a request	5-1
About flags	5-2
Adding a flag to a request	5-2
Removing a flag from a request	5-2

### 6 Approval

---

About approval	6-1
Viewing the requests to approve	6-1
Viewing the details of a coding request awaiting approval	6-1
Approving requests	6-2

Disapproving requests	6-2
-----------------------	-----

## 7 Reports and data exports

---

About reports	7-1
Producing a report	7-1
Viewing the list of report requests	7-2
Deleting a report request	7-2
Viewing the parameters for a report	7-2
Viewing the results of a report	7-2
About data exports	7-3
Exporting data to a report file	7-3

## Part II Admin Tasks

---

## 8 Users, roles, rights, and work teams

---

About users	8-1
User account types	8-1
User account statuses	8-2
User management in an environment with native authentication	8-3
Adding a user	8-3
Changing a user password	8-4
Viewing or editing the details for a user	8-4
Activating a user	8-4
Deactivating a user	8-4
Terminating a user	8-5
User management in an Oracle SSO environment	8-5
User account statuses	8-5
Viewing the list of users	8-6
Assigning and editing the roles for a user	8-6
Assigning and editing the work teams for a user	8-6
About roles and rights	8-7
Roles and rights management	8-7
Viewing the list of roles	8-8
Adding a role and assigning its rights	8-8
Viewing or editing the details of a role	8-9
Assigning and editing the rights to a role	8-9
Deleting a role	8-10
About work teams	8-10
Viewing the list of work teams	8-10

Adding a work team and assigning its rights	8-11
Viewing or editing the details for a work team	8-11
Adding or removing the users in a work team	8-11
Deleting a work team	8-12

## 9 System information and configuration

---

About system configuration	9-1
Setting authentication parameters in environments with native authentication	9-1
Configuring application settings	9-1
Configuring job settings	9-2
Viewing system information	9-2
Setting flag definitions	9-2

## 10 Synonym lists and synonyms

---

About synonym lists	10-1
Creating a synonym list	10-1
Adding a synonym to a synonym list	10-2
Deleting a synonym list	10-2
Copying a synonym list	10-3
Renaming a synonym list	10-3
Activating a synonym list	10-3
Deactivating a synonym list	10-3
About synonyms	10-4
Viewing the full coding details for a synonym	10-4
Editing the details for a synonym	10-4
Activating a synonym	10-5
Deactivating a synonym	10-5
Promoting a synonym	10-5
Accepting a synonym	10-6
Rejecting a synonym	10-6
Masking a synonym	10-6
Unmasking a synonym	10-7

## 11 Stopword lists and stopwords

---

About stopword lists	11-1
Creating a stopword list	11-1
Adding a stopword to a stopword list	11-2
Deleting a stopword list	11-2
Copying a stopword list	11-2

Renaming a stopword list	11-3
Activating a stopword list	11-3
Deactivating a stopword list	11-3
About stopwords	11-4
Activating a stopword	11-4
Deactivating a stopword	11-4
Promoting a stopword	11-5
Accepting a stopword	11-5
Rejecting a stopword	11-5
Masking a stopword	11-6
Unmasking a stopword	11-6

## 12 Coding algorithms

---

About coding algorithms	12-1
Creating a coding algorithm	12-1
Adding steps to a coding algorithm	12-1
Removing a step from a coding algorithm	12-2
Changing the order of steps in a coding algorithm	12-2
Activating or deactivating a coding algorithm	12-2
Deleting a coding algorithm	12-3

## 13 Coding definitions and auto-suggestions

---

About coding definitions	13-1
Creating a coding definition	13-1
Editing a coding definition	13-2
Deleting a coding definition	13-2
About auto-suggestions	13-2
Creating an auto-suggestion	13-3
Enabling the auto-suggestion feature	13-3
Deleting an auto-suggestion	13-3

## 14 Assignment Rules

---

About assignment rules	14-1
Creating an assignment rule	14-1
Editing an assignment rule	14-2
Changing the order in which assignment rules run	14-3
Deleting an assignment rule	14-3

## 15 Dictionary element configuration

---

About configuring dictionary elements	15-1
Configuring autocode targets	15-1
Configuring elements in the request list pages	15-2
Configuring elements in the coding browser	15-3
Configuring elements returned with a coding match	15-4
About resetting dictionary elements	15-5
Resetting elements for a coding definition	15-5

## 16 Ongoing management

---

About jobs and job logs	16-1
Viewing the job log	16-1
Deleting a job	16-1
Stopping a job	16-2
About managing coding requests	16-2
Viewing the details of a coding request	16-2
Editing the work team assignment for a coding request	16-3
Viewing the details of an unassigned coding request	16-3
Running assignment rules on unassigned requests	16-3
Resending an undeliverable request	16-3
Resending all undeliverable requests	16-4
Error messages for undeliverable requests	16-4
About system locks	16-5
Viewing locked objects and revoking a lock	16-5
About coding request and audit data deletion	16-5
Configuring the deletion of coded requests and audit data	16-5
Deleting coded requests and audit data for an assignment rule	16-6
About the Audit History Report	16-6
Producing the Audit History report	16-7
About dictionary information	16-7
Viewing the details for an installed dictionary	16-7
Browsing the dictionary hierarchy	16-7

## 17 Impact analysis

---

About impact analysis	17-1
Configuring your system to work with impact analysis	17-1
Setting impact analysis parameters	17-2
Setting the dictionary elements to require reconciliation	17-2
Setting the default reconciliation options for verbatims	17-3



Comparing dictionary versions	17-3
Running a dictionary version comparison	17-3
Exporting a dictionary version comparison	17-4
Deleting a dictionary version comparison	17-5
Rerunning a dictionary version comparison	17-5
Performing impact analysis	17-5
Association methods	17-6
Running impact analysis	17-6
Canceling impact analysis	17-7
Performing optional analysis tasks	17-7
Perform optional analysis tasks	17-8
Synonym list upgrade management	17-8
Synonym reconciliation management	17-10
Coding definition upgrade management	17-12
Verbatim reconciliation management	17-13
Performing post-analysis tasks	17-15
Performing post-impact analysis tasks	17-15
Running the Impact Analysis Report	17-16
Exporting impact analysis data	17-16
Rerunning impact analysis	17-17

## 18 Adapters

---

About adapters	18-1
Adding an adapter	18-1
Editing adapter information	18-1
Deleting an adapter	18-1

## 19 Study information

---

About study information	19-1
Adding a study from the Oracle InForm application	19-1
Editing study information	19-1
Resetting the Oracle InForm Adapter bookmark	19-2
Study locks management	19-2
Locking and unlocking a study	19-2
Decommissioning a study	19-3
Study deletion management	19-3
Deleting only study information	19-4
Deleting study information and associated data	19-4
About study groups	19-4

Creating a study group	19-4
Modifying a study group	19-4
Deleting a study group	19-5
Adding a study to a study group	19-5

## 20 Job schedules

---

About job schedules	20-1
Configuring your system to work with job schedules	20-2
Creating a job schedule for an adapter	20-2
Clearing a job schedule for an adapter	20-3
Adding a study to a job schedule	20-3
Removing a study from a job schedule	20-3
About nonscheduled jobs	20-3
Running a nonscheduled job for a study	20-4

## 21 Queries

---

About queries	21-1
Configuring your system to work with queries	21-2
Required rights for working with queries	21-2
Setting system configuration options for queries	21-3
Standard query reasons	21-3
Adding a standard reason for a query action	21-3
Closing a query	21-4
About auto queries	21-4
Configuring your system to work with auto queries	21-5
Setting system configuration options for auto queries	21-5
Auto query list	21-6
Removing a verbatim from the auto query list	21-6

## 22 Page-level help reference

---

Adapters page	22-3
[Algorithm Name] page	22-4
Algorithms page	22-5
All Requests Page	22-5
Approvals page	22-7
Approve Query dialog box	22-10
Assign Rights to Role: [Role Name] dialog box	22-11
Assign Users to Work Team: [Work Team Name] dialog box	22-11
Assignment Rules page	22-12

Auto Query List page	22-12
Auto Suggestions page	22-13
Change Password dialog box	22-14
Choose Source and Target Coding Definitions dialog box	22-14
Close Query dialog box	22-14
Coding Browser dialog box	22-15
[Coding Definition name] dialog box	22-17
Coding Definitions page	22-17
Coding Flags page	22-22
Coding Requests page	22-22
Compare Coding Results dialog box	22-25
Create Query dialog box	22-25
Delete Query dialog box	22-26
Dictionaries page	22-26
Dictionary Changes page	22-27
[Dictionary Name] page	22-28
Dictionary Selection dialog box	22-29
Element Configuration page	22-29
Force Close Query dialog box	22-32
In Process page	22-32
Locks page	22-34
My Profile dialog box	22-34
New Adapter/[Adapter Name] page	22-35
[New Algorithm] page	22-36
[New Assignment Rule]/[Assignment Rule Name] page	22-37
[New Role]/Role Details page	22-38
New Study Information page/[Study Name] Study Information page—Edit	22-39
[New Synonym] page	22-41
[New Synonym List] page	22-42
[New Synonym List] copied from the [Synonym List Name] page	22-42
[New Stopword List] page	22-43
[New Stopword List] copied from the [Stopword List Name] page	22-43
[New User]/[User Name] page	22-43
[New Work Team]/Work Team Details page	22-45
Path Changes page	22-45
Product Report/View Report Request dialog box	22-46
Queries page	22-52
Query History page	22-53
Query Standard Reason List page	22-55
Reason for change/Recode reason/Disapprove reason dialog box	22-56
Reconcile Synonyms page	22-57

Reconcile Verbatim page	22-58
Reconciliation Options page	22-59
Reissue Query dialog box	22-60
Report Requests page	22-60
Request Details page	22-62
Roles page	22-67
Schedule [Adapter Name] Job—Advanced page	22-68
Schedule [Adapter Name] Job—Basic page	22-70
[Stopword List Name] page—Edit	22-70
[Stopword List Name] page—Manage stopwords	22-70
Stopword Lists page	22-71
Study Group Detail page	22-72
Study Group List page	22-73
Study Information page	22-73
[Synonym List Name] page—Edit	22-75
[Synonym List Name] page—Manage synonyms	22-75
Synonym Lists page	22-76
[Synonym Name] page	22-78
System Configuration page	22-79
Term Changes page	22-85
Unassigned Requests page	22-86
Upgrade Coding Definition dialog box	22-87
Upgrade Synonym List dialog box	22-87
Upgrade Synonym List In Process page	22-88
Users page	22-89
View Full Coding dialog box	22-90
View Job Log/Update Codes [Coding Definition Name] page	22-90
View Medicinal Product Information dialog box	22-91
View Path Changes Detail dialog box	22-91
Works Teams page	22-92

## 23 Default roles and rights

---

Default roles	23-1
Default rights	23-4

## 24 Verifying and updating codes

---

About the Verify Codes report	24-1
Generating the Verify Codes report	24-1
Viewing the Verify Codes report	24-1



# Preface

This preface contains the following sections:

- [Documentation accessibility](#)
- [Related resources](#)
- [Diversity and Inclusion](#)
- [Access to Oracle Support](#)
- [Additional copyright information](#)

## 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>.

## Related resources

All documentation and other supporting materials are available on the [Oracle Help Center](#).

## Diversity and Inclusion

Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our initiative to build a more inclusive culture that positively impacts our employees, customers, and partners, we are working to remove insensitive terms from our products and documentation. We are also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

## 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.

## Additional copyright information

This documentation may include references to materials, offerings, or products that were previously offered by Phase Forward Inc. Certain materials, offerings, services, or products may no longer be offered or provided. Oracle and its affiliates cannot be held responsible for any such references should they appear in the text provided.

# Part I

## User Tasks

In this part:

- [Getting Started](#)
- [Coding details](#)
- [Coding](#)
- [Queries](#)
- [Notes and flags](#)
- [Approval](#)
- [Reports and data exports](#)



# 1

## Getting Started

In this chapter:

- [Launching the application](#)
- [Logging into the application](#)
- [Logging out of the application](#)
- [Viewing your account profile](#)
- [Changing your password](#)
- [Getting started in an environment migrated to Oracle SSO authentication](#)
- [Setting the list page size](#)
- [Getting help](#)
- [Support for character types](#)

### Launching the application

Your administrator sets the method of opening the Oracle Central Coding application. By default, you open the application by going to the following URL 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 Oracle Central Coding software is installed. This name is defined during installation.

- In a single sign-on (SSO) environment, the URL is provided by your delegated administrator.

### Logging into the application

1. Launch the Oracle Central Coding application.  
The Login page appears.
2. Enter your login name and password.

 **Note:**

If your Oracle Central Coding system is Federated, see [Link your Oracle Health Sciences Identity and Access Management Service and Federated accounts](#)

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 SSO environments, passwords must meet the security requirements displayed on the page.

- 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. You can view folder content, change your password, see your account details, or set the size of list view pages displayed.

 **Note:**

For environments with native authentication, the Oracle 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.

- [Link your Oracle Health Sciences Identity and Access Management Service and Federated accounts](#)

## Link your Oracle Health Sciences Identity and Access Management Service and Federated accounts

If Federation authentication is set up for your account, either you or your organization must perform a one-time linking of your Oracle Health Sciences Identity and Access Management Service account and your Federated Identity Provider account.

If applicable, follow these steps to manually link your Oracle Health Sciences Identity and Access Management Service and Federated accounts.

1. Enter the Oracle Central Coding URL in your browser.
2. Click **Sign In with your Federation account**.

3. Enter your Federation username, and click **Next**.
4. Enter your Federation password, and click **Next**.  
The Link Accounts page appears.
5. Enter your Oracle Health Sciences Identity and Access Management Service SSO user account name and password.
6. Select **I have read the Legal Notice**.
7. Click **Link Accounts**.

## 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 SSO environment and you were also logged in to an SSO-enabled instance of the Oracle 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](#).

## Changing your password

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

- [Changing your password in an SSO environment](#)
- [Changing your password in an SSO environment with a Federated account](#)
- [Changing your password in an environment with native authentication](#)

## Changing your password in an 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 and confirm your new password
7. Click **Save**.

## Changing your password in an SSO environment with a Federated account

If you are using a Federated login to access Oracle Central Coding, you must follow your organizations Federated account's process for changing your password.

## Changing your password in an environment with native authentication

1. Log in to the Oracle 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 [My Profile dialog box](#)
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 Oracle Central Coding application has been migrated from an environment with native authentication to an Oracle SSO environment and you had a user account prior to the migration, the first time you log in with your new SSO credentials you are prompted to link your existing user account to the SSO environment. Enter the credentials for your existing account in the **Former User ID** and **Former Password** fields, and then click **Link**. The Oracle Central Coding application migrates your role and work team assignments to the SSO environment.



### Note:

If you forget your former password before you link the accounts, contact a Oracle Central Coding user administrator to reset it.

If you are a new user or an existing user who was already assigned roles or work teams in the SSO environment, the Oracle Central Coding home page appears when you log in for the first time.

## 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](#)
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

You can access the entire Oracle Central Coding 6.3.x.x documentation set from the Oracle Help Center (OHC).

To open the OHC page for the Oracle Central Coding 7.0 release:

- In the upper right corner of the Oracle Central Coding user interface, click the Help (

**Help**

) icon.

The OHC page opens in a separate browser window.

Alternatively, go to the landing page for the Oracle Central Coding documentation on the OHC, and click the link for the release of your choice to open the associated documentation set OHC page.

- <https://docs.oracle.com/en/industries/health-sciences/central-coding/index.html>

## Support for character types

The Oracle Central Coding application supports the following character types:

- Kanji
- Kana types—Katakana and Hiragana
- Alphanumeric

# 2

## Coding details

In this chapter:

- [About coding details](#)

### About coding details

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

- [Viewing coding requests](#)
- [Viewing the details of a coding request](#)
- [Viewing the full coding details for a coded request](#)
- [Viewing the synonyms for a code](#)
- [Viewing Medicinal Product information](#)

### 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](#).
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](#).

### 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](#).

## 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](#) or [Coding an item and propagating the value](#).

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.

or more information, see [Coding a single item](#) or [Coding an item and propagating the value](#).

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](#).

# 3

## Coding

In this chapter:

- [About coding](#)
- [About autocoding](#)
- [About interactive coding](#)

### 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 Oracle 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 Oracle 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 Oracle 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](#)



## 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](#).

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](#)
- [Coding modes](#)
- [Coding methods](#)
- [Coding a single item](#)
- [Coding an item and propagating the value](#)
- [Suggesting a synonym](#)
- [Clearing code values](#)

## 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](#).

## 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 Oracle 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](#).

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](#).

## 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](#).

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](#).
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 Oracle 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](#) or [Coding an item and propagating the value](#).

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](#).
- Accessible to the user.

After code values are cleared in the Oracle Central Coding application, the source application clears the same values in response. If the source application is Oracle InForm, the Oracle 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. Perform one of the following:
  - Select **Actions** > **Clear and Propagate** to clear the code value for multiple requests.
  - Select **Actions** > **Clear Code** to clear the code value for a single request.

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** (●).

# 4

## Queries

In this chapter:

- [About queries](#)
- [About queries](#)
- [About auto queries](#)

### 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](#) or [Creating a query from the coding browser](#).

Queries created in the Oracle Central Coding application can be closed in the Oracle 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](#).
- If the query is in **Answered** state and the verbatim can be coded, a Oracle Central Coding user closes the query.
- A Oracle 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 Oracle Central Coding and the Oracle InForm applications, and both Oracle Central Coding and Oracle InForm users can view and modify them. For more information about how the Oracle Central Coding system exchanges query data with the Oracle InForm system, see:

- [Viewing queries and their status](#)
- [Viewing the audit history for a query](#)
- [Creating a query from the Coding Requests or Approvals page](#)
- [Creating a query from the coding browser](#)
- [Reissuing a query](#)
- [Retrying a query delivery](#)

## 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](#).
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](#).


## Creating a query from the Coding Requests or Approvals page

1. Select a verbatim.
2. Perform one of the following:
  - Select **Actions > Create query single** to create a query on a single verbatim.
  - 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](#).
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 Oracle 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 Oracle 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](#).
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 Oracle 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 Oracle 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 Oracle 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](#).
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 Oracle 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.

# 5

## Notes and flags

In this chapter:

- [About notes](#)
- [About flags](#)

### 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 Oracle 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 Oracle 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](#)
- [Viewing note details for 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 Oracle Central Coding application provides a set of flags, identified by color. A Oracle Central Coding administrator can configure the meaning of each flag or disable the Flags functionality. Oracle Central Coding does not store flag history in the audit trail for the associated coding request.

- [Adding a flag to a request](#)
- [Removing a flag from a 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**.

# 6

## Approval

In this chapter:

- [About approval](#)

### About approval

The approval functionality is available only if configured for your system. An administrator can configure the Oracle 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 Oracle InForm, the Oracle Central Coding application can return approval details such as the approver name and approval date to Oracle InForm.

- [Viewing the requests to approve](#)
- [Viewing the details of a coding request awaiting approval](#)
- [Approving requests](#)
- [Disapproving requests](#)

### Viewing the requests to approve

1. Select **Approvals**.

The Approvals page appears. For a description of the fields on this page, see [Approvals page](#).

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](#).

## 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](#).

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. Perform one of the following:

- Click the **Approve Single** button to approve a single request.
- 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](#). 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. Perform one of the following:

- Click the **Disapprove Single** button to disapprove a single request.
- 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 Oracle 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** (🚫).

# 7

## Reports and data exports

In this chapter:

- [About reports](#)
- [About data exports](#)

### About reports

To view and monitor coding data, Oracle 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 Oracle Central Coding application generates reports in Rich Text Format (RTF) and saves them to the database.

- [Producing a report](#)
- [Viewing the list of report requests](#)
- [Deleting a report request](#)
- [Viewing the parameters for a report](#)
- [Viewing the results of a report](#)

### 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 [Product Report/View Report Request dialog box](#).

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](#).

## 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.  
For Coded Items Report and Coding Consistency Report, additional fields appear. For more information, see:
  - Coded Items Report - [Product Report/View Report Request dialog box](#).
  - Coding Consistency Report - [Product Report/View Report Request dialog box](#).The View Report Request page appears.
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 Oracle 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](#)

## 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 [Product Report/View Report Request dialog box](#).
5. Click **Accept**.  
The Document Viewer page appears with the Windows File Download dialog box.
6. Perform one of the following:
  - To save the file, click **Save**. The report file is saved in RTF format.

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

# Part II

## Admin Tasks

In this part:

- [Users, roles, rights, and work teams](#)
- [System information and configuration](#)
- [Synonym lists and synonyms](#)
- [Stopword lists and stopwords](#)
- [Coding algorithms](#)
- [Coding definitions and auto-suggestions](#)
- [Assignment Rules](#)
- [Dictionary element configuration](#)
- [Ongoing management](#)
- [Impact analysis](#)
- [Adapters](#)
- [Study information](#)
- [Job schedules](#)
- [Queries](#)
- [Page-level help reference](#)
- [Default roles and rights](#)
- [Verifying and updating codes](#)

# 8

## Users, roles, rights, and work teams

In this chapter:

- [About users](#)
- [About roles and rights](#)
- [About work teams](#)

### About users

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

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

- **Native authentication**—Used in all self-hosted Oracle Central Coding instances. User accounts, roles, and work team assignments are managed in the application by the Oracle Central Coding administrator. Users log in to the Oracle Central Coding application directly using the credentials provided by a user administrator.
- **SSO authentication**—Available only for Oracle Central Coding instances hosted by Oracle. Your organization's delegated administrator (CDA) creates, manages, and grants access to user accounts from Oracle Health Sciences Identity and Access Management Service (OHSIAMS). After a user account is set up in Oracle Health Sciences Identity and Access Management Service, a Oracle Central Coding user administrator assigns roles and work teams to the user. Users log in with their SSO credentials. If the Oracle 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](#)
- [User account statuses](#)
- [User management in an environment with native authentication](#)
- [User management in an Oracle SSO environment](#)
- [Viewing the list of users](#)
- [Assigning and editing the roles for a user](#)
- [Assigning and editing the work teams for a user](#)

### 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.

 **Note:**

Oracle recommends assigning the SuperUser account type to one or more users (preferably those with system and user administrator privileges). This ensures you always have at least one account with user management capabilities, since the last SuperUser account is protected against deactivation.

## User account statuses

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

Hover text	Description
Inactive Never Used (  )	The user profile exists, but it has not been activated. Accounts for new users have this status.
Active Never Used (  )	The user profile is active, but the user has not attempted to log in.
Active (  )	The user has successfully logged in and can access the application. New accounts must be activated before they can be used.
Locked (  )	An active user account is locked if the user exceeds the maximum log-in attempts configured in the System Configuration setting <b>Failed logon limit</b> when using an incorrect password. The user can attempt to log in again after a set amount of time configured in the System Configuration setting <b>Non-Super user lockout timeout</b> .
Inactive (  )	The user is in the system but cannot access the application. Inactive accounts can be activated.
Terminated (  )	The user can no longer access the application. Termination is permanent and terminated accounts cannot be activated again.
Invalid (  )	Database-only status. The user profile is being entered and is not yet saved. When the user profile is saved, it automatically changes to Inactive Never Used.

## User management in an environment with native authentication

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

New user accounts 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 Oracle Central Coding administrator can define three types of users on the [User Name] page. The Oracle Central Coding application authenticates each type as follows:

User type	Authentication type
Native	User ID and password must match encrypted data from the Oracle 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](#)
- [Changing a user password](#)
- [Viewing or editing the details for a user](#)
- [Activating a user](#)
- [Deactivating a user](#)
- [Terminating a user](#)

### 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 [\[New User\]/\[User Name\] page](#).
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 [\[New User\]/\[User Name\] page](#).
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 Oracle 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**.

 **Note:**

You cannot deactivate the last SuperUser account.

The status changes to **Inactive** ()


## 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



In Oracle SSO environments, user account management is performed by a customer delegated administrator (CDA) in Oracle Health Sciences Identity and Access Management Service. For more information, see the *User Provisioning in SSO Environments Guide*.

Roles and work team assignments are managed by a user administrator in the Oracle Central Coding application.

- [User account statuses](#)

## User account statuses

Users are provisioned to Oracle Central Coding after being created in Oracle Health IAMS. Once provisioned to Oracle Central Coding, each user account has a status described in the following table. The Customer Coding User Administrator (CUA) can then update the roles and work teams for the users.

Hover text	Description
Active Never Used (  )	The user profile is active, but the user has not attempted to log in. Accounts for new users have this status.
Active (  )	The user has successfully logged in and can access the application.



 **Note:**

Besides 'Active Never Used' and 'Active', the drop-down lists of statuses in Oracle Central Coding also include 'Inactive Never Used', 'Inactive', 'Locked', and 'Terminated'. However, these statuses cannot be utilized through the Oracle Central Coding application, as user are managed through Oracle Health IAMS.

## 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](#).

## 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**.

 **Note:**

Changes to the roles of a currently logged in user take effect immediately. If the user tries to access a part of the user interface to which their access has been removed, an `Unexpected Results` error appears, and they are denied access.

## 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 are managed in the Oracle Central Coding application for both self-hosted and Oracle-hosted environments.

- [Roles and rights management](#)
- [Viewing the list of roles](#)
- [Adding a role and assigning its rights](#)
- [Viewing or editing the details of a role](#)
- [Assigning and editing the rights to a role](#)
- [Deleting a role](#)

## Roles and rights management

The Oracle 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 Oracle 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 Oracle 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 Oracle 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 Oracle 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. This role can only be assigned to users with Oracle user accounts.
- **Oracle Services Consultant**—In an Oracle SSO environment, an Oracle Services representative with rights to manage dictionaries, perform coding setup, and run impact analysis. This role can only be assigned to users with Oracle user accounts.

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

- **Production user**—A user who has access to the Oracle 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.
- **Customer delegated administrator**—In an Oracle SSO environment, a user who performs user management tasks through Oracle Health Sciences Identity and Access Management Service Oracle Identity Self Service.

Each role has an associated set of rights. Rights control the pages that appear to users and the availability of actions. A Oracle 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](#).

## 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](#).

## 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](#).
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](#). For a complete list of the default roles and their rights, see [Default roles and rights](#).

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](#).
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](#). For a complete list of the default roles and their rights, see [Default roles and rights](#).

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.

Work teams are managed in the Oracle Central Coding application for both self-hosted and Oracle-hosted environments.

- [Viewing the list of work teams](#)
- [Adding a work team and assigning its rights](#)
- [Viewing or editing the details for a work team](#)
- [Adding or removing the users in a work team](#)
- [Deleting a work team](#)

## 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 [Works Teams page](#).

## Adding a work team and assigning its rights

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 [\[New Work Team\]/Work Team Details page](#).
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](#).
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 [\[New Work Team\]/Work Team Details page](#).
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](#).
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.

# 9

## System information and configuration

In this chapter:

- [About system configuration](#)

### 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 [Setting impact analysis parameters](#).

For information on configuring the system for queries, see [Setting system configuration options for queries](#) ([Setting system configuration options for queries](#), [About queries](#)).

- [Setting authentication parameters in environments with native authentication](#)
- [Configuring application settings](#)
- [Configuring job settings](#)
- [Viewing system information](#)
- [Setting flag definitions](#)

### 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](#).

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](#).

 **Note:**

Some application options are available only if Oracle 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](#).
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 Oracle Central Coding product, the Oracle database, and Windows. You can also view copyright information for the software products used with the Oracle 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**.

# 10

## Synonym lists and synonyms

In this chapter:

- [About synonym lists](#)
- [About synonyms](#)

### 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 [About coding definitions](#).

- [Creating a synonym list](#)
- [Adding a synonym to a synonym list](#)
- [Deleting a synonym list](#)
- [Copying a synonym list](#)
- [Renaming a synonym list](#)
- [Activating a synonym list](#)
- [Deactivating a synonym list](#)

### 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](#).

6. Click the **Save** button.

You can now add synonyms to the list. For more information, see [Adding a synonym to a synonym list](#).

The page refreshes and additional fields appear. For a description of the fields on this page, see [\[Synonym List Name\] page—Manage synonyms](#).

## 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](#).

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](#).
- A dictionary manager or administrator adds a synonym to an existing synonym list. For more information, see [Adding a synonym to a synonym list](#).
- [Viewing the full coding details for a synonym](#)
- [Editing the details for a synonym](#)
- [Activating a synonym](#)
- [Deactivating a synonym](#)
- [Promoting a synonym](#)
- [Accepting a synonym](#)
- [Rejecting a synonym](#)
- [Masking a synonym](#)
- [Unmasking a synonym](#)

## 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](#).

## 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](#).

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**.

(Optional) Enter the result of the procedure here.

## 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**.



# 11

## Stopword lists and stopwords

In this chapter:

- [About stopword lists](#)
- [About stopwords](#)

### About stopword 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 [About coding definitions](#).

- [Creating a stopword list](#)
- [Adding a stopword to a stopword list](#)
- [Deleting a stopword list](#)
- [Copying a stopword list](#)
- [Renaming a stopword list](#)
- [Activating a stopword list](#)
- [Deactivating a stopword list](#)

### 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—Manage stopwords](#).

## Adding a stopword to a 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. 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 the \[Stopword List Name\] page](#).
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 stopword list

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

1. Select **Coding Setup > Stopword Lists**.  
The Stopword Lists page appears.
2. Select one or more stopword 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 stopword list

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

1. Select **Coding Setup > Stopword Lists**.  
The Stopword Lists page appears.
2. Select one or more stopword 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](#)
- [Deactivating a stopword](#)
- [Promoting a stopword](#)
- [Accepting a stopword](#)
- [Rejecting a stopword](#)
- [Masking a stopword](#)
- [Unmasking a stopword](#)

## 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 stopword

Use this procedure to add a stopword from an inherited stopword 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 stopword 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 stopword

Use this procedure to add a created stopword to a 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. Click the **Accept** button.

## Rejecting a stopword

Use this procedure to remove a stopword from a 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. 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 stopwords

Inherited stopwords keep the status from the parent stopwords list.

Use this procedure to mask a stopwords from a child stopwords 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 stopwords 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 stopwords

Use this procedure to make a previously masked stopwords visible in the child 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. Select **Actions > Unmask**.  
The Reason for Change dialog box appears.
5. In the **Reason** field, enter a description for the change.
6. Click **Accept**.

# 12

## Coding algorithms

In this chapter:

- [About coding algorithms](#)

### About coding algorithms

The Oracle 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](#)
- [Adding steps to a coding algorithm](#)
- [Removing a step from a coding algorithm](#)
- [Changing the order of steps in a coding algorithm](#)
- [Activating or deactivating a coding algorithm](#)
- [Deleting a coding algorithm](#)

### 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**.

# 13

## Coding definitions and auto-suggestions

In this chapter:

- [About coding definitions](#)
- [About auto-suggestions](#)

### 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](#).

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](#).

- [Creating a coding definition](#)
- [Editing a coding definition](#)
- [Deleting a coding definition](#)

### 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 Oracle 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](#).
- 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](#)
- [Enabling the auto-suggestion feature](#)
- [Deleting an auto-suggestion](#)

## 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](#).
2. Specify a secondary autocode target for the coding definition on the Element Configuration page. For more information, see [Configuring autocode targets](#).

The Oracle 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](#) or [Coding an item and propagating the value](#).

The Oracle 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](#).
2. Apply the coding algorithm to a coding definition. For more information, see [Editing a coding definition](#).
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 Oracle 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](#).

4. Select an auto-suggestion.
5. Select **Actions > Delete**.  
A confirmation dialog box appears.
6. Click **OK**.

# 14

## Assignment Rules

In this chapter:

- [About assignment rules](#)

### About assignment rules

An assignment rule is a set of criteria that defines how incoming coding requests are routed in the Oracle 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 Oracle Central Coding application attempts to autocode an incoming request.
- How the Oracle Central Coding application handles approvals and reviews and returns deliveries to the source application.
- Which work team the Oracle Central Coding application assigns to a request.
- Which coding definition the Oracle Central Coding application associates with a rule.
- Whether the Oracle Central Coding application deletes coding requests after delivery.
- [Creating an assignment rule](#)
- [Editing an assignment rule](#)
- [Changing the order in which assignment rules run](#)
- [Deleting an assignment rule](#)

### 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 [\[New Assignment Rule\]/\[Assignment Rule Name\] page](#).
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.

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


 **Note:**

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

- iv. 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](#).

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](#).

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**.



# 15

## Dictionary element configuration

In this chapter:

- [About configuring dictionary elements](#)
- [About resetting dictionary elements](#)

### 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 Oracle 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](#)
- [Configuring elements in the request list pages](#)
- [Configuring elements in the coding browser](#)
- [Configuring elements returned with a coding match](#)

### Configuring autocode targets

Use this procedure to select the autocode targets that the Oracle 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. Perform one of the following:
    - To configure autocode targets at the dictionary level, select **Coding Setup > Dictionaries**.  
The Dictionaries page appears.
    - To configure autocode targets at the coding definition level, select **Coding Setup > Coding Definitions**.  
The Coding Definitions page appears.
  2. Perform one of the following:
    - Select a dictionary.
    - 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](#).
  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. Perform one of the following:
  - To configure dictionary elements at the dictionary level, select **Coding Setup > Dictionaries**.  
The Dictionaries page appears.
  - To configure dictionary elements at the coding definition level, select **Coding Setup > Coding Definitions**.  
The Coding Definitions page appears.
2. Perform one of the following:

- Select a dictionary.
  - 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](#).
  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. Perform one of the following:
  - To configure dictionary elements at the dictionary level, select **Coding Setup > Dictionaries**.  
The Dictionaries page appears.
  - To configure dictionary elements at the coding definition level, select **Coding Setup > Coding Definitions**.  
The Coding Definitions page appears.
2. Perform one of the following:
  - Select a dictionary.
  - 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](#).
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 Oracle 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 Oracle Central Coding database.
  - Export the data in a report.
  - Export the element to an external application with the coding request.
1. Perform one of the following:
    - To configure dictionary elements at the dictionary level, select **Coding Setup > Dictionaries**.

The Dictionaries page appears.
    - To configure dictionary elements at the coding definition level, select **Coding Setup > Coding Definitions**.

The Coding Definitions page appears.
  2. Perform one of the following:
    - Select a dictionary.
    - 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](#).
  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](#).
  - 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](#)

## 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**.

# 16

## Ongoing management

In this chapter:

- [About jobs and job logs](#)
- [About managing coding requests](#)
- [About system locks](#)
- [About coding request and audit data deletion](#)
- [About the Audit History Report](#)
- [About dictionary information](#)

### About jobs and job logs

In this section:

- [Viewing the job log](#)
- [Deleting a job](#)
- [Stopping a job](#)

### Viewing the job log

The job log displays information about the Get Requests and Return Codes jobs. The Oracle 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/Update Codes \[Coding Definition Name\] page](#).

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/Update Codes \[Coding Definition Name\] page](#).

### 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 a job.
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](#)
- [Editing the work team assignment for a coding request](#)
- [Viewing the details of an unassigned coding request](#)
- [Running assignment rules on unassigned requests](#)
- [Resending an undeliverable request](#)
- [Resending all undeliverable requests](#)
- [Error messages for undeliverable requests](#)

## 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](#).

## 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](#).

## 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](#).
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><b>Description:</b> The Oracle Central Coding application could not find a source application system user.</p> <p><b>Solution:</b> Add a system user in the source application.</p>
Verbatim data value does not match or has changed	<p><b>Description:</b> The verbatim changed in the source application after it was sent to the Oracle Central Coding application.</p> <p><b>Solution:</b> No action is needed. The verbatim will be updated in the Oracle Central Coding application at the next scheduled update.</p>
Coding Value not updated: Page Deleted	<p><b>Description:</b>The page was deleted in the source application after the verbatim was sent to the Oracle Central Coding application. The item could not be delivered.</p> <p><b>Solution:</b> No action is needed. The verbatim will be deleted at the next scheduled update.</p>
Value not updated: Itemset row deleted	<p><b>Description:</b> The itemset was deleted in the source application and the item could not be delivered.</p> <p><b>Solution:</b> No action is needed. The verbatim will be deleted at the next scheduled update.</p>
Trial not found	<p><b>Description:</b> The communication between the Central Coding and the source application was not working at the time of delivery.</p> <p><b>Solution:</b> Retry the delivery. If the request is still undeliverable, contact your system administrator.</p>

Error message	Description/Solution
Code map not found	<p><b>Description:</b> 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 Oracle Central Coding became undeliverable to the source application.</p> <p><b>Solution:</b> If the source application is Oracle InForm, Oracle recommends that you upgrade to Oracle 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 Oracle 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](#)

## 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](#).

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 Oracle 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 Oracle 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](#)
- [Deleting coded requests and audit data for an assignment rule](#)

## Configuring the deletion of coded requests and audit data

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

The System Configuration page appears. For a description of the fields on this page, see [System Configuration page](#).

2. Select **Show Delete Request After Delivery Option**.

The **Delete request after delivery** option is enabled for all assignment rules.

3. Select **Delete Request Audit Information** for the Oracle 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 Oracle 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 Oracle 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](#)

## 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 Oracle Central Coding installation and must be installed separately. A dictionary manager loads dictionaries and language packs in the Oracle Central Coding application using the Dictionary Loader tool. You cannot add or remove dictionaries using the Oracle 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](#)
- [Browsing 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](#).

## 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](#).

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.

# 17

## Impact analysis

In this chapter:

- [About impact analysis](#)
- [Performing impact analysis](#)
- [Performing post-analysis tasks](#)

### About impact analysis

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

- [Configuring your system to work with impact analysis](#)
- [Setting impact analysis parameters](#)
- [Setting the dictionary elements to require reconciliation](#)
- [Setting the default reconciliation options for verbatims](#)
- [Comparing dictionary versions](#)

### Configuring your system to work with impact analysis

1. Verify that a new standard or custom dictionary version is uploaded.

For more information, see *Central Coding Installation Guide*.

2. Verify that you have the following rights:

- 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

For more information, see: [Viewing or editing the details of a role](#).

3. Stop the Get Request and Return Codes jobs for each study related to the dictionary to upgrade.

For more information, see: [Stopping a job](#)

This step prevents the Oracle Central Coding application from receiving new verbatims during the upgrade process.

4. Set impact analysis parameters.

For more information, see: [Setting impact analysis parameters](#) and [System Configuration page](#).

5. Set the dictionary elements to require reconciliation.

For more information, see: [Setting the dictionary elements to require reconciliation](#), [Reconciling a verbatim](#), and [Reconciliation Options page](#).

6. Set the default reconciliation options for verbatims.

For more information, see: [Setting the default reconciliation options for verbatims](#) and [Element Configuration page](#).

## 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](#).

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. Perform one of the following actions:
  - To configure dictionary elements at the dictionary level, select **Coding Setup > Dictionaries**.

The Dictionaries page appears.

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

The Coding Definitions page appears.

(Optional) Enter the result of the step here.

2. Perform one of the following actions:
  - Select a dictionary.
  - Select a coding definition.
3. Select **Actions > Element Configuration**.

For a description of the fields on this page, see [Element Configuration page](#).

The Element Configuration page appears.

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](#).

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](#).

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 Oracle 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

In this section:

- [Running a dictionary version comparison](#)
- [Exporting a dictionary version comparison](#)
- [Deleting a dictionary version comparison](#)
- [Rerunning a dictionary version comparison](#)

## 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](#).
    - 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](#).
    - 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 Detail dialog box](#).

## 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](#).
    - 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](#).

- 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 Detail dialog box](#).

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**.

(Optional) Enter the result of the step here.

3. Select a dictionary comparison.

4. Select **Actions > Rerun**.

A confirmation dialog box appears.

5. Click **OK**.

## Performing impact analysis

In this section:

- [Association methods](#)
- [Running impact analysis](#)
- [Canceling impact analysis](#)
- [Performing optional analysis tasks](#)

## Association methods

For the Oracle 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](#) and [Upgrading a synonym list](#).

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](#) and [Reconciling a synonym](#).

## 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](#).

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](#) and [Saving verbatim changes to the database](#).

- 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](#).

To view the updated status of the verbatims, run the Impact Analysis Report. For more information, see [Running the Impact Analysis Report](#).

## 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.
- [Perform optional analysis tasks](#)
- [Synonym list upgrade management](#)
- [Synonym reconciliation management](#)
- [Coding definition upgrade management](#)
- [Verbatim reconciliation management](#)

## Perform optional analysis tasks

1. Upgrade the synonym list associated with the original dictionary version.  
For more information, see: [Upgrading a synonym list](#).
2. Reconcile the synonyms in the new synonym list.  
For more information, see: [Reconciling a synonym](#).
3. Save synonym changes to the database.  
For more information, see: [Saving synonym changes to the database](#).
4. Upgrade the coding definition associated with the original dictionary version.  
For more information, see: [Upgrading a coding definition](#).
5. Reconcile changes in coding between dictionary versions for verbatims.  
For more information, see: [Reconciling a verbatim](#).
6. Save the verbatim changes to the database.  
For more information, see: [Saving verbatim changes to the database](#).

## 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 Oracle 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 Oracle 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 Oracle 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](#).

- [Upgrading a synonym list](#)
- [Viewing the status of a synonym list upgrade](#)
- [Canceling a synonym list upgrade](#)
- [Rerunning a synonym list upgrade](#)

## 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](#).

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](#).

8. Do one of the following:

- If there are no synonym differences between the dictionaries, save the upgraded list.  
For more information, see [Saving synonym changes to the database](#).
- If there are synonym differences between the dictionary versions, reconcile the synonyms.  
For more information, see [Reconciling a synonym](#).

## 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](#).

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

- [Reconciling a synonym](#)
- [Saving synonym changes to the database](#)
- [Running the Synonym Reconciliation Report](#)

## 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—InProgress**.

4. Click the **Reconcile** button.

The Reconcile Synonyms page appears. For a description of the fields on this page, see [Reconcile Synonyms page](#).

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 Oracle 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](#).

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 Oracle Central Coding application generates the final version of the report when you update the synonym list.

Synonyms that are automatically reassociated 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 Oracle 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 a coding definition](#).

If you use auto-suggestions, after you upgrade a coding definition, the Oracle 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](#)

## 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](#).

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](#).

## Verbatim reconciliation management

After you change the assignment rules to use a new dictionary version, the Oracle 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](#)
- [Saving verbatim changes to the database](#)

## Reconciling a verbatim

The Oracle 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](#).

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 Verbatim page](#).

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** pcolumn.

If the Oracle 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](#).
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 Oracle 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 Oracle Central Coding application saves the changes and generates the final version of the Impact Analysis Report.

## Performing post-analysis tasks

In this section:

- [Performing post-impact analysis tasks](#)
- [Running the Impact Analysis Report](#)
- [Exporting impact analysis data](#)
- [Rerunning impact analysis](#)

## Performing post-impact analysis tasks

1. Re-enable the Get Requests and Return codes jobs for each study related to the upgraded dictionary.  
For more information, see: [Running a nonscheduled job for a study](#)
2. Verify that new coding requests use the correct coding definition and dictionary version.

- For more information, see: [Viewing the details of a coding request](#)
3. Run the Impact Analysis Report.  
For more information, see: [Running the Impact Analysis Report](#)
  4. Export the impact analysis data.  
For more information, see: [Exporting impact analysis data](#)
  5. Rerun impact analysis.  
For more information, see: [Rerunning impact analysis](#)

## 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 Oracle 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](#).

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**.

# 18

## Adapters

In this chapter:

- [About adapters](#)

### About adapters

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

- [Adding an adapter](#)
- [Editing adapter information](#)
- [Deleting an adapter](#)

### 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](#).
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 [New Adapter/\[Adapter Name\] page](#).

### Deleting an adapter

1. Select **Admin > System > Adapters**.  
The Adapters page appears.
2. Select an adapter.

3. Click the **Delete** button.



# 19

## Study information

In this chapter:

- [About study information](#)
- [About study groups](#)

### About study information

Each Oracle InForm study must be associated with an Oracle InForm adapter. After an Oracle InForm adapter has been defined, one or more Oracle InForm studies can be defined.

Each Clinical One study must be associated with a Clinical One adapter. After a Clinical One adapter has been defined, one or more Clinical One studies can be defined.

- [Adding a study from the Oracle InForm application](#)
- [Editing study information](#)
- [Resetting the Oracle InForm Adapter bookmark](#)
- [Study locks management](#)
- [Locking and unlocking a study](#)
- [Decommissioning a study](#)
- [Study deletion management](#)
- [Deleting only study information](#)
- [Deleting study information and associated data](#)

### Adding a study from the Oracle 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](#).
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](#).
2. Select a study.

3. Click the **Edit** button.  
The [Study Name] Study Information page appears.
4. Edit the information using the descriptions in [New Study Information page/\[Study Name\] Study Information page—Edit](#).
5. Click the **Save** button.

## Resetting the Oracle InForm Adapter bookmark

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

If coding inconsistencies exist between Central Coding and Oracle InForm, you can manually reset the bookmark attribute for the Oracle InForm Adapter application in Oracle Central Coding. This action retrieves all uncoded verbatims again from the Oracle 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 Oracle Central Coding application.

Verbatims that are already in **Delivered** state receive the **Completed** status. As a result, the Oracle Central Coding application can return them again to the Oracle 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 Oracle 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 Oracle 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 [New Study Information page/\[Study Name\] Study Information page—Edit](#).

4. Perform one of the following:
  - To lock the study, select **Study Locked**.
  - 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 Oracle Central Coding application assigns new studies to a default study group called System.

- [Creating a study group](#)
- [Modifying a study group](#)
- [Deleting a study group](#)
- [Adding a study to a study group](#)

## 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 Oracle 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 Oracle 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.

# Job schedules

In this chapter:

- [About job schedules](#)
- [About nonscheduled jobs](#)

## About job schedules

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

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

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

 **Note:**

Before the Exchange Query Updates job can run, a Oracle Central Coding application administrator must enter the username of an Oracle InForm or Clinical One 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 ([Setting system configuration options for queries](#), [About queries](#)) or Editing study information ([Editing study information](#), [About queries](#)).

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

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

The Oracle 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 Oracle 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 Oracle 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 source application. After the Get Requests job is complete, the Oracle 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 source 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.

- [Configuring your system to work with job schedules](#)
- [Creating a job schedule for an adapter](#)
- [Clearing a job schedule for an adapter](#)
- [Adding a study to a job schedule](#)
- [Removing a study from a job schedule](#)


## Configuring your system to work with job schedules

1. Set up adapters.  
For more information, see: [Adding an adapter](#).
2. Define job schedules for each adapter.  
There are no default timetables for job schedules.  
For more information, see: [Creating a job schedule for an adapter](#).
3. Add studies to the job schedule.  
For more information, see: [Adding a study to a job schedule](#).

## 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 \[Adapter Name\] Job—Basic page](#).
  - 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 \[Adapter Name\] Job—Advanced page](#).
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 Oracle Central Coding application. This action does not clear the codes and approval details in the Oracle InForm application.

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

The Adapters page appears. For a description of the fields on this page, see [Adapters page](#).

2. Select an adapter.
3. Perform one of the following actions:
  - Select **Actions > Clear Get Verbatims**.
  - Select **Actions > Clear Return Codes**.

## Adding a study to a job schedule

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

The Study Information page appears.

2. Perform one of the following actions:
  - Select **Get Requests**.
  - Select **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. Perform one of the following actions:
  - Deselect **Get Requests**.
  - Deselect **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 Oracle 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 Oracle 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](#)

## Running a nonscheduled job for a study



You can run the following jobs manually:

- **Get Requests**—To retrieve coding requests from the Oracle InForm application for the studies associated with an adapter.
- **Return Codes**—To return coded requests to the Oracle 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](#).

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

The Study Information page appears. For a description of the fields on this page, see [Study Information page](#).

2. Click the **Get Requests** or the **Return Codes** () icon for a study.  
The Oracle Central Coding application starts the job.
3. To view the results of a job, click the **Log** () icon.

# 21

## Queries

In this chapter:

- [About queries](#)
- [About queries](#)
- [About auto queries](#)

### About queries

Queries are applicable to both Oracle InForm and Clinical Ones studies, and behave the same way.

Queries and query statuses appear in both the Oracle Central Coding and the source application (Oracle InForm or Clinical One), and both Oracle Central Coding users and the Oracle InForm or Clinical One users can view and modify them.

Queries that are created in the Oracle Central Coding application appear in the InForm application as generated by an Oracle InForm application user with query rights. A Oracle 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 ([Setting system configuration options for queries](#), [About queries](#)) or Editing study information ([Editing study information](#), [About queries](#)).

The Oracle Central Coding application sends query information to the Oracle InForm application for review by an Oracle 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 Oracle InForm and the Oracle Central Coding applications each time it runs. For more information, see About job schedules ([About job schedules](#), [About queries](#)).

An Oracle InForm query created in the Oracle Central Coding application can be addressed in the InForm application in the following ways:

- An Oracle InForm site user modifies the verbatim associated with the query and marks the query as **Answered**.
- An Oracle InForm site user marks a query as **Answered** and states that the original value is correct.
- An Oracle InForm user deletes the verbatim.
- An Oracle 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 Oracle Central Coding application.

- [Configuring your system to work with queries](#)

- [Required rights for working with queries](#)
- [Setting system configuration options for queries](#)
- [Standard query reasons](#)
- [Closing a query](#)

## Configuring your system to work with queries

1. Assign roles and rights to users who work with queries.  
For more information, see: [Default roles](#), [Default rights](#), and [Required rights for working with queries](#).
2. Schedule jobs for each study.  
The Get Requests job schedule determines when query data is synchronized in the Oracle InForm and Oracle Central Coding applications.  
For more information, see: [Adding a study to a job schedule](#).
3. Assign studies to study groups.  
Study group settings determine auto close and auto query settings for queries.  
For more information, see: [About study groups](#) and [Modifying a study group](#).
4. Set system configuration options for queries.  
For more information, see: [Setting system configuration options for queries](#) and [About queries](#).
5. Create a list of standard query reasons.  
For more information, see: [Standard query reasons](#).
6. Configure auto query and auto close settings for studies.  
For more information, see: [Creating a study group](#), [About auto queries](#), and [Setting system configuration options for auto queries](#).

## 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 <b>Open</b> or <b>Candidate</b> state.

Right	Category	Description
Issue Candidate Query	Coding	Allows you to create a query in the <b>Candidate</b> 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 <b>Open</b> 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 page](#).
4. Click the **Save** button.

## Standard query reasons

When you create, close, reissue, or delete a query in the Oracle 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 Oracle Central Coding application includes the following standard query reasons.

Action type	Reasons
Create	<ul style="list-style-type: none"> <li>• Make verbatim more specific.</li> <li>• Missing context item(s).</li> <li>• Verbatim misspelled.</li> </ul>
Close	<ul style="list-style-type: none"> <li>• Response satisfies query.</li> </ul>
Reissue	<ul style="list-style-type: none"> <li>• Response does not satisfy query.</li> </ul>
Delete	<ul style="list-style-type: none"> <li>• Query is not valid anymore.</li> </ul>

Standard query reasons:

- Are visible for each study and study group.
- Appear both in the Oracle InForm application and in the Reason drop-down list in query dialog boxes in the Oracle Central Coding application.
- [Adding a standard reason for a query action](#)

## 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](#).

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](#).


You can manually close a query in the Oracle 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](#).

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 Oracle 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.

- [Configuring your system to work with auto queries](#)
- [Setting system configuration options for auto queries](#)
- [Auto query list](#)

## Configuring your system to work with auto queries

1. Create a study group or modify the default system study group.  
For more information, see: [About study groups](#), [Creating a study group](#) and [Modifying a study group](#)
2. Add studies to the study group.  
Associate the studies for which you intend to assign the same auto query and auto close settings.  
For more information, see: [Adding a study to a study group](#).
3. Configure the auto query and auto close settings for the study group.  
The settings apply to each study in the group.  
For more information, see: [Setting system configuration options for auto queries](#).

## 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 Oracle 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 Oracle 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](#)

## 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**.

## Page-level help reference

In this appendix:

- [Adapters page](#)
- [\[Algorithm Name\] page](#)
- [Algorithms page](#)
- [All Requests Page](#)
- [Approvals page](#)
- [Approve Query dialog box](#)
- [Assign Rights to Role: \[Role Name\] dialog box](#)
- [Assign Users to Work Team: \[Work Team Name\] dialog box](#)
- [Assignment Rules page](#)
- [Auto Query List page](#)
- [Auto Suggestions page](#)
- [Change Password dialog box](#)
- [Choose Source and Target Coding Definitions dialog box](#)
- [Close Query dialog box](#)
- [Coding Browser dialog box](#)
- [\[Coding Definition name\] dialog box](#)
- [Coding Definitions page](#)
- [Coding Flags page](#)
- [Coding Requests page](#)
- [Compare Coding Results dialog box](#)
- [Create Query dialog box](#)
- [Delete Query dialog box](#)
- [Dictionaries page](#)
- [Dictionary Changes page](#)
- [\[Dictionary Name\] page](#)
- [Dictionary Selection dialog box](#)
- [Element Configuration page](#)
- [Force Close Query dialog box](#)
- [In Process page](#)
- [Locks page](#)
- [My Profile dialog box](#)



- [New Adapter/\[Adapter Name\] page](#)
- [\[New Algorithm\] page](#)
- [\[New Assignment Rule\]/\[Assignment Rule Name\] page](#)
- [\[New Role\]/Role Details page](#)
- [New Study Information page/\[Study Name\] Study Information page—Edit](#)
- [\[New Synonym\] page](#)
- [\[New Synonym List\] page](#)
- [\[New Synonym List\] copied from the \[Synonym List Name\] page](#)
- [\[New Stopword List\] page](#)
- [\[New Stopword List\] copied from the \[Stopword List Name\] page](#)
- [\[New User\]/\[User Name\] page](#)
- [\[New Work Team\]/Work Team Details page](#)
- [Path Changes page](#)
- [Product Report/View Report Request dialog box](#)
- [Queries page](#)
- [Query History page](#)
- [Query Standard Reason List page](#)
- [Reason for change/Recode reason/Disapprove reason dialog box](#)
- [Reconcile Synonyms page](#)
- [Reconcile Verbatim page](#)
- [Reconciliation Options page](#)
- [Reissue Query dialog box](#)
- [Report Requests page](#)
- [Request Details page](#)
- [Roles page](#)
- [Schedule \[Adapter Name\] Job—Advanced page](#)
- [Schedule \[Adapter Name\] Job—Basic page](#)
- [\[Stopword List Name\] page—Edit](#)
- [\[Stopword List Name\] page—Manage stopwords](#)
- [Stopword Lists page](#)
- [Study Group Detail page](#)
- [Study Group List page](#)
- [Study Information page](#)
- [\[Synonym List Name\] page—Edit](#)
- [\[Synonym List Name\] page—Manage synonyms](#)
- [Synonym Lists page](#)
- [\[Synonym Name\] page](#)

- [System Configuration page](#)
- [Term Changes page](#)
- [Unassigned Requests page](#)
- [Upgrade Coding Definition dialog box](#)
- [Upgrade Synonym List dialog box](#)
- [Upgrade Synonym List In Process page](#)
- [Users page](#)
- [View Full Coding dialog box](#)
- [View Job Log/Update Codes \[Coding Definition Name\] page](#)
- [View Medicinal Product Information dialog box](#)
- [View Path Changes Detail dialog box](#)
- [Works Teams page](#)

## Adapters page

The help for this page includes descriptions for core fields, actions, and buttons only.

### Fields

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

Action	Shortcut	Description
Add	Ctrl+Shift+N	Opens the New Adapter page, where you can add information about an Oracle InForm Adapter to the Oracle Central Coding application.

---

Action	Shortcut	Description
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

---

Button	Shortcut	Description
Add	Ctrl+Shift+N	Opens the New Adapter page, where you can add information about an Oracle InForm Adapter to the Oracle Central Coding application.

---

## [Algorithm Name] page

The help for this page includes descriptions for core fields, actions, and buttons only.

### Fields

---

Field	Description
Order	The order that the application runs the steps in the algorithm.

---

### Actions

---

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

---

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.

---

Action	Description
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

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

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

Field	Description
Verbatim field	The verbatim to search for. 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.
Subject ID	The source application identifier for the subject associated with the coding request.

Field	Description
A	<p>The autocode status.</p> <ul style="list-style-type: none"> <li> <p><b>Autocoded</b> ()—The request was autocoded.</p> </li> <li> <p><b>Blank</b>—The request was not autocoded.</p> </li> </ul>
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	<p>Indicates that the coding request requires attention. A Oracle Central Coding administrator can configure the meaning of each coding flag.</p>
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	<p>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.</p>
Site	<p>A unique identifier for the subject site. This information comes from the source application.</p>
Study	<p>The name of the study.</p> <p>The name is an active link if your environment is integrated with the Oracle InForm application. The link opens the Oracle InForm application page for the study.</p> <p>For a Clinical One study, the link navigates to the Clinical One landing page, where all studies are listed. It does not open the study itself.</p>
Form Name	<p>RefName of the form associated with the request. This information comes from the source application.</p>

## Actions

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

Field	Description
Verbatim field	The verbatim to search for. 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.
Subject ID field	The source application identifier for the subject associated with the coding request.
Notes	Indicates that there is a note associated with the coding request. Pointing to the Note icon displays the text for each entry in the note. The note entries are sorted from newest to oldest.
Flag icon	Indicates that the coding request requires attention. A Oracle Central Coding administrator can configure the meaning of each coding flag.

---

<b>Field</b>	<b>Description</b>
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 Oracle 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	<p>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.</p>
Site	<p>A unique identifier for the subject site. This information comes from the source application.</p>
Study	<p>The name of the study.</p> <p>The name is an active link if your environment is integrated with the Oracle InForm application. The link opens the Oracle InForm application page for the study.</p> <p>For a Clinical One study, the link navigates to the Clinical One landing page, where all studies are listed. It does not open the study itself.</p>
Form Name	<p>RefName of the form associated with the request. This information comes from the source application.</p>
Subject ID header	<p>The source application identifier for the subject associated with the coding request. This information comes from the source application.</p>

---

**Actions**

---

<b>Action</b>	<b>Shortcut</b>	<b>Description</b>
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>
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>
Clear Code	-	<p>Removes the code value only for the selected verbatim. Clearing the code values in the Oracle Central Coding application clears the corresponding code values in the source application.</p>

---





**Buttons**

Button	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.

## Approve Query dialog box

The help for this page includes descriptions for core fields, actions, and buttons only.

Field	Description
Copy (  ) icon	Copies the verbatim text to the Other text box for editing.
Query State	The state assigned to the query. <ul style="list-style-type: none"> <li>• <b>Open</b>—Visible and able to be addressed by an Oracle InForm user in the Oracle InForm application.</li> <li>• <b>Candidate</b>—Preliminary query not visible to an Oracle InForm user in the Oracle InForm application. A Oracle Central Coding administrator can assign a query to the Open or Deleted state. Only users with the Issue Candidate Query right can create queries in Candidate state.</li> </ul>
Reason	Descriptive text about the reason to approve the query. A Oracle Central Coding administrator can configure the default reasons and can specify which reason appears first in the list.

Field	Description
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 reasoncheckbox appears only for users who have the Manage Standard Reasons right.</p>
Auto close upon query complete	<p>Instructs the Oracle 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 Oracle 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 appge includes descriptions for core fields, actions, and buttons only.

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.

### 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.

**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.

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**



Field	Description
Verbatim field	The verbatim to search for. 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.
Verbatim header	The original reported text that describes the adverse event, disease, drug, or other item to be coded. This information comes from the source application.
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**

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.

Field	Description
Verbatim field	The verbatim for which to view available auto-suggestions. 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.
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	The disease or disorder for which the drug was taken. 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.
Route of Administration	The route by which the drug was administered. 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.
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.

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.

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	When selected, the Oracle 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. 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.
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.




Field	Description
Reason	Descriptive text about the reason for creating the query. A Oracle 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

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	Creates a query in the Oracle Central Coding application to be answered by an Oracle InForm or Clinical One user.

Field	Description
Search for	The text to code. This field is editable only when the browser is in Search mode. Searches are case-insensitive.
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	Indicates whether to use the Auto Suggested code value for the item. This feature applies only when an item is autocoded. This button is active only when the browser is in Search mode.
Return All Matches	Indicates whether the matched terms found appear in the browser. By default, the coding browser displays 200 matches. This number, and whether this option is available, is set by your administrator. This button is active only when the browser is in Search mode.
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.
<b>P</b> 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.
<b>nc</b> 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 ( <b>OF</b> ) icon	Indicates that the code entry is obsolete. The name of the country where it is obsolete appears when you point to the code.
Preferred Names ( <b>P</b> ) icon	Indicates the Preferred Name in the WHODrug dictionary.
Generic-Non-Preferred Names ( <b>GnP</b> ) icon	Indicates those records in a WHODrug dictionary that are Generic-Non-Preferred Names.

Field	Description
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

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.

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 autcoded.

## Coding Definitions page

The help for this page includes descriptions for core fields, actions, and buttons only.



**Fields**

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**

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.

Action	Shortcut	Description
Verify and Update Codes	-	Instructs the Oracle Central Coding application to review the codes for coded requests against a new dictionary. Changes are tracked in the audit history.



**N**

**o**

**t**

**e**

**:**

**T**

**h**

**i**

**s**

**s**

**n**

**o**

**t**

**a**

**s**

**t**

**a**

**n**

**d**

**a**

**r**

**d**

**O**

**r**

**a**

**c**

**l**

**e**

**C**

**e**

**n**

**t**

**r**

**a**

**l**

**C**

**o**

**d**

**i**

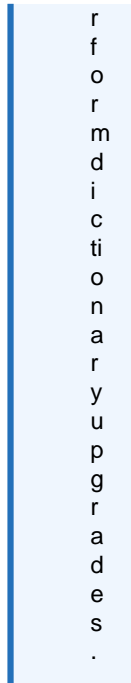
**n**

**g**

**f**

Action	Shortcut	Description
		unctionality and should not be used in place of Impact Analysis tool

Action	Shortcut	Description
View Verify and Update Job Log	-	<p>Opens the View Job Log page, where you can view the results of updating the codes for coded requests against a new dictionary.</p>
Run Impact Analysis	-	<p>Used during impact analysis only.</p> <p>Opens the Choose Source And Target Coding Definitions dialog box, where you can select two coding definitions to compare for impact analysis.</p>
View Impact Analysis Process	-	<p>Used during impact analysis only.</p> <p>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.</p>



## Buttons

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.

Field	Description
Icon	The coding flag icon that the Oracle 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.

### Fields

Field	Description
Verbatim field	The verbatim to search for. 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.
Subject ID field	A source application identifier for the subject associated with the coding request. This information comes from the source application.
Notes	Indicates that there is a note associated with the coding request. Pointing to the Note icon displays the text for each entry in the note. The note entries are sorted from newest to oldest.

---

<b>Field</b>	<b>Description</b>
Flag	Indicates that the coding request requires attention. A Oracle 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 Oracle 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.
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 Oracle InForm application. The link opens the InForm application page for the study.</p> <p>For a Clinical One study, the link navigates to the Clinical One landing page, where all studies are listed. It does not open the study itself.</p>
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

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 Oracle 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

Button	Shortcut	Description
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.

Button	Shortcut	Description
Code Single	Alt+M	Opens the Coding Browser dialog box, where you can interactively code the selected verbatim.  The application codes only the selected item.

## 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.

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.


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 Oracle 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	Adds the text in the Other field to the list of standard reasons that appear in the Reason list.  The Add as standard reasoncheckbox appears only for users who have the Manage Standard Reasons right.



Field	Description
Query State	<p>The state assigned to the query.</p> <ul style="list-style-type: none"> <li>• <b>Open</b>—Visible and able to be addressed by an InForm user in the Oracle InForm application.</li> <li>• <b>Candidate</b>—Preliminary query not visible to an Oracle InForm user in the Oracle InForm application. A Oracle Central Coding administrator can assign a query to the Open or Deleted state. Only users with the Issue Candidate Query right can create queries in Candidate state.</li> </ul>
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 Oracle 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.

Field	Description
Reason	<p>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.</p>
Copy (  ) icon	<p>Copies the text from the Reason drop-down list to the Other text box for editing.</p>
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 reasoncheckbox appears only for users who have the Manage Standard Reasons right.</p>

## Dictionaries page

The help for this page includes descriptions for core fields, actions, and buttons only.

**Fields**

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**

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****Fields**

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

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

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 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.

Field	Description
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 Oracle Central Coding application supports.

### 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.

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.

### 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.

### 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.

### 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.

### Elements

Field	Description
Name	The hierarchy level in the dictionary.
Autocode Target	Indicates that the Oracle Central Coding application autocodes to this code, term, and dictionary level as default target.
Secondary Target	Indicates that the Oracle 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.


Field	Description
Return	Indicates that the Oracle 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	<p>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.</p>
Search Code	<p>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.</p>
Browse	<p>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.</p>
Request List	<p>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.</p>
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**

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.

Field	Description
Reason	Descriptive text about the reason to close the query. A Oracle 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**

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.

Field	Description
Step	The current processing step of the impact analysis process. <ul style="list-style-type: none"> <li>• Prepare</li> <li>• Reconcile</li> <li>• Update</li> </ul>
Status	The status of the processing step. <ul style="list-style-type: none"> <li>• In Process</li> <li>• Not Started</li> <li>• Scheduled</li> <li>• Running</li> <li>• Complete</li> </ul>
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

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

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.



Button	Shortcut	Description
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

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

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

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.

### 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.

### 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.


### 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.

Field	Description
Adapter Name	The name of the Oracle InForm or Clinical One adapter to add to the study.
Adapter Type	The product type that sends the requests. The Oracle Central Coding application defines this property. <ul style="list-style-type: none"> <li>INFORM</li> <li>CLINICALONE When you select CLINICALONE, the Test button and all the radio buttons used to define the type of communication with the Oracle InForm Adapter are hidden.</li> </ul>
Adapter URL	<ul style="list-style-type: none"> <li>For Oracle InForm: The URL for the server where the Oracle InForm Adapter software is installed. If you are using authentication to call the Oracle InForm Adapter web services, you must use a TLS connection (https).</li> <li>For Clinical One: The coding service entry point.</li> </ul>

Field	Description
Test button	<p>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.</p> <div data-bbox="1117 428 1458 632" style="border: 1px solid #0070C0; padding: 10px; background-color: #E6F2FF;"> <p> <b>Note:</b>            This button is hidden if the Adapter Type is CLINICAL ONE.</p> </div>
Call AdapterAdmin Interface	<p>Indicates the authentication method for calling the Oracle InForm Adapter Administration interface when the Adapter URL starts with https.</p>
Call Coding Interface	<p>Indicates the authentication method for calling the Oracle InForm Adapter Coding interface when the Adapter URL starts with https.</p> <p>If you select User Name/Password, you must enter the Oracle InForm authentication user name and password on the System Configuration page or the Study Information page for the studies associated with the adapter.</p>
Call Discrepancy Interface	<p>Indicates the authentication method for calling the Oracle InForm Adapter Discrepancy Enhanced interface when the Adapter URL starts with https.</p> <p>If you select User Name/Password, you must enter the Oracle InForm authentication user name and password on the System Configuration page or the Study Information page for the studies associated with the adapter.</p> <ul style="list-style-type: none"> <li>• Both Certificate and UN/PW authentication are supported. By default, Oracle Central Coding uses Certificate Authentication, but at certain times UN/PW Authentication is needed when the Discrepancy interface needs to exchange certain data with Oracle Central Coding and also with another external system.</li> <li>• In order for UN/PW Authentication to function, the InForm user configured in Oracle Central Coding must be an active Oracle InForm user. Any issues with the user need to be addressed in Oracle InForm.</li> </ul>

## [New Algorithm] page

The help for this page includes descriptions for core fields, actions, and buttons only.

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.

### 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 Oracle Central Coding application returns coded values to the Oracle 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.

## 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"> <li>• <b>ClientName</b>—The name of the source application for which the Oracle Central Coding application is coding the request.</li> <li>• <b>Product</b>—The product type for the request. The Oracle Central Coding application defines this property.</li> <li>• <b>ClientHost</b>—The name of the server for the study.</li> <li>• <b>Verbatim</b>—The original reported text that describes the adverse event, disease, drug, or other item to be coded. This information comes from the source application.</li> <li>• <b>DictType</b>—The dictionary type.</li> <li>• <b>StudyName</b>—The name of the study.</li> <li>• <b>Site</b>—A unique identifier for the subject site. This information comes from the source application.</li> <li>• <b>VisitName</b>—The name of the visit. This information comes from the source application.</li> <li>• <b>ItemType</b>—The kind of item to be coded. This information comes from the source application.</li> <li>• <b>FormName</b>—The form RefName. This information comes from the source application.</li> </ul>
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 <b>Value</b> field is invalid, the Oracle 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.

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.

Field	Description
Source Application	<p>The name of the application that is integrated with the Oracle Central Coding application.</p> <ul style="list-style-type: none"> <li>• Oracle InForm</li> <li>• Clintrial</li> <li>• ClinicalOne</li> </ul>
Adapter	<p>The name of the physical server where the study is installed. All Oracle InForm or Clinical One adapters appear in the drop-down list.</p>
C1 Study ID (Study_Title)	<p>Appears if the Source Application is Clinical One.</p> <p>The name of the study. This name appears in the user interface where studies are listed.</p>
C1 Study GUID	<p>Appears if the Source Application is Clinical One.</p> <p>The GUID that corresponds to the study entered in the C1 Study ID (Study_Title) field.</p>
Mode	<p>Appears if the Source Application is Clinical One.</p> <p>The mode of the study listed in the C1 Study ID (Study_Title) field.</p> <ul style="list-style-type: none"> <li>• Active</li> <li>• Test</li> </ul>
Trial	<p>The name of the study. The Oracle Central Coding application does not support multiple studies with the same study name.</p>
URL	<p>The base URL for the study.</p> <p>For Clinical One only:</p> <ul style="list-style-type: none"> <li>• This is a read-only field that displays the full study URL (with the study name and mode values).</li> <li>• The URL field will initially be populated with the C1 URL as entered in the Adapter field. After you save the study information and reopen the Study Information page for editing, the fully specified Study URL appears in this field.</li> </ul>
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 Oracle Central Coding application.</p> <p>The Oracle Central Coding application includes a default study group called System.</p>

Field	Description
PutCodes Client Audit User	<p>A transaction user that the Oracle Central Coding application uses to return codes and approval details to the Oracle InForm application. The Oracle InForm audit records show this user name as the user who entered or modified the coding results.</p> <ul style="list-style-type: none"> <li>For SSO-enabled Oracle InForm studies, the user name format is <i>organization_ID.username</i>. This field is case-sensitive and must match the Oracle InForm name exactly.</li> <li>For all other studies, the account name is the user name only.</li> </ul>
Oracle InForm Query User	<p>The user name used to create and update queries in the Oracle InForm application. The user name appears in the Oracle InForm application as the user who created each Oracle Central Coding query.</p> <p>In an Oracle SSO environment:</p> <ul style="list-style-type: none"> <li>For SSO-enabled Oracle InForm studies, the user name format is <i>organization_ID.username</i>. This field is case-sensitive and must match the Oracle InForm name exactly.</li> <li>For all other studies, the account name is the user name only.</li> </ul> <p>If the field is blank, the Oracle Central Coding application uses the Query Create User in Client on the System Configuration page to communicate with the Oracle InForm study.</p>

Field	Description
Oracle InForm Authentication User and Oracle InForm Authentication User Password	<p>The user name and password of an Oracle InForm application user created to communicate with the Oracle InForm server through web services.</p> <p>The specified user:</p> <ul style="list-style-type: none"> <li>Is required only when username/password authentication is selected on the Adapter page for calls to the Oracle InForm Adapter Coding and Discrepancy interfaces.</li> <li>Should have no additional rights in the InForm application.</li> <li>Should be different from the transaction users specified in the PutCodes Client Audit User and Query Create User in Client fields.</li> </ul> <p>The Oracle InForm authentication user details are:</p> <ul style="list-style-type: none"> <li>Valid only when both fields contain values.</li> <li>Used either for all studies or for the studies associated with a specific adapter.</li> </ul> <p>The Oracle InForm Authentication User field is case-sensitive.</p> <p>If the field is blank, the Oracle Central Coding application uses the InForm Authentication User and Password on the System Configuration page to communicate with the InForm study.</p> <p>If the Oracle Central Coding application is uninstalled and then reinstalled or migrated to a new server, the user name and password must be entered again after the new installation is completed.</p> <p>For more information, see <a href="#">New Adapter/[Adapter Name] page</a>.</p>
Support Query	Indicates whether the study supports query management. This option must be selected only for studies that come from the Oracle InForm application.
Study Locked	Locks the study in the Oracle Central Coding and the Oracle InForm applications. On the All Requests page, only administrators can view the requests associated with the study.

## [New Synonym] page

The help for this page includes descriptions for core fields, actions, and buttons only.

### Fields

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**

Action	Description
Code	Opens the Coding Browser dialog box, where you can interactively code the proposed synonym.

**Buttons**

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.

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 the [Synonym List Name] page

The help for this page includes descriptions for core fields, actions, and buttons only.

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.

Field	Description
Parent	The name of the stopwords list to inherit. When you create a stopwords list by inheriting the contents of another list, the child stopwords 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 the [Stopword List Name] page

The help for this page includes descriptions for core fields, actions, and buttons only.

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.

### 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 Oracle Central Coding application is running in an Oracle SSO environment.

Field	Description
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>

 **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.

User must change password

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.

Only for environments with native authentication.

 **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.

---

Field	Description
Organization ID	The ID for your organization. For Oracle SSO environments only. The ID may change through acquisition.

---

### 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.

---

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

---

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

---

Action	Description
Export	Exports the list of changes in a Comma-Separated Value (CSV) file.

---

### Buttons

---

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.

---

Button	Description
Export	Exports the list of changes in a Comma-Separated Value (CSV) file.

## Product Report/View Report Request dialog box

The help for this page includes descriptions for core fields, actions, and buttons only.

### 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 (=).

### 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.

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"> <li>• If a verbatim is specified in the Verbatim field, the report displays inconsistent codes information about that verbatim.</li> <li>• If a verbatim is not specified in the Verbatim field, the report displays inconsistent codes information about all the verbatims.</li> </ul>

### Coding Consistency Report

Field	Description
Verbatim	<p>The verbatim for which to view coding information. If the field is blank, the Oracle 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.</p>
Coding Mode	<p>The methods used to code the request.</p> <ul style="list-style-type: none"> <li>• <b>Both</b>—Includes the data for both interactively and automatically coded items.</li> <li>• <b>Interactive</b>—Includes only the data for interactively coded items.</li> <li>• <b>Autocode</b>—Includes only the data for automatically coded items.</li> </ul>
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>

Field	Description
End Date	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. You can enter the current date into a date field by inserting an equal sign (=).
Show only verbatims with inconsistent codes	Indicates whether the report displays information only about verbatims that received different codes in various instances. <ul style="list-style-type: none"> <li>If a verbatim is specified in the Verbatim field, the report displays inconsistent codes information about that verbatim.</li> <li>If a verbatim is not specified in the Verbatim field, the report displays inconsistent codes information about all the verbatims.</li> </ul>

### Coded Items 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 (=).
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.

### Coded Items Report

Field	Description
Study	The name of the study from the selected study group for which to include data.

Field	Description
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>
Cumulative	<ul style="list-style-type: none"> <li>• <b>Selected</b>—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.</li> <li>• <b>Not selected</b>—Report includes only the items that were coded in the application in the specified date range.</li> </ul>

### 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	<p>Indicates whether to include the coding definition used in each study.</p>



## New Export

Field	Description
Export Type	<p>Indicates the export to run:</p> <ul style="list-style-type: none"> <li>• <b>AutoCode Export</b>—Details the percentage of autocoded items for one or each study in a specified date range.</li> <li>• <b>Auto Suggestion List Export</b>—Details the auto-suggestion list for a coding definition.</li> <li>• <b>Coded Items Export</b>—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.</li> <li>• <b>Coder Metrics Export</b>—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.</li> <li>• <b>Coding Consistency Export</b>—Details the codings for a specified dictionary type, study, verbatim, and coding mode in a specified date range.</li> <li>• <b>Query Export</b>—Details the queries or the status of queries opened in the Oracle Central Coding application for a study.</li> <li>• <b>Study Metrics Export</b>—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.</li> <li>• <b>Synonym List Export</b>—Details a synonym list for a coded definition.</li> <li>• <b>Uncoded Items Export</b>—Details the uncoded items for one or each study in a specified date range.</li> </ul> <p>The Oracle 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>

## New Request

Field	Description
Report Type	<p>Specifies the report type to run.</p> <ul style="list-style-type: none"> <li>• <b>Coded Items Report</b>—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.</li> <li>• <b>Coding Consistency Report</b>—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.</li> <li>• <b>Workteams, Roles, and Rights by User</b>—Provides a list of assigned work teams, roles, and rights for each active user in the system. You must enter parameters for each report type, except for the Workteams, Roles, and Rights by User report.</li> </ul>
Report Name	A name for the report. By default, this is the same as the Report Type.

## 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.

## Study Metrics 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>

Field	Description
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 (=).
Show Coding Definitions	Indicates whether to include the coding definition used in each study.

### Uncoded Items 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 (=).
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

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.

Field	Description
Study	<p>The name of the study.</p> <p>The name is an active link if your environment is integrated with the Oracle InForm application. The link opens the InForm application page for the study.</p> <p>For a Clinical One study, the link navigates to the Clinical One landing page, where all studies are listed. It does not open the study itself.</p>
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

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.
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 Oracle Central Coding application.

## Query History page

The help for this page includes descriptions for core fields, actions, and buttons only.

Field	Description
Query status	<p>The query status.</p> <ul style="list-style-type: none"> <li>• <b>Opened</b> (🔍) —Entered in the Oracle Central Coding application by a Oracle Central Coding user to be addressed by an Oracle InForm user.</li> <li>• <b>Candidate</b> (🔍) —Entered by a Oracle Central Coding user with the Issue Candidate Query right.</li> <li>• <b>Answered</b> (📌) —Open query that was addressed by an Oracle InForm user.</li> <li>• <b>Closed</b> (🟢) —Query on a verbatim that was successfully coded and approved. A query can enter the Closed state if it is manually closed by a Oracle Central Coding user or automatically closed by the Oracle Central Coding application.</li> <li>• <b>Deleted</b> (🗑️) —Candidate query that was deleted by a Oracle Central Coding user with the Issue Candidate Query right. Only queries in the Candidate state can be deleted.</li> <li>• <b>Undeliverable, retry</b> (🔔) —Opened query whose data could not be delivered to the source application because of a communication issue. The Oracle Central Coding application retries delivery when the next Get Requests job runs.</li> <li>• <b>Undeliverable, cannot retry</b> (🚫) —Opened query whose data could not be delivered to the Oracle InForm application because the form is locked or deleted in the Oracle InForm application. As a result, the query is closed in the Oracle Central Coding application.</li> </ul>
Date	The date of each transaction related to the query.
User	The user who entered or most recently modified the query in the Oracle Central Coding application.
Status	<p>The status of the query:</p> <ul style="list-style-type: none"> <li>• Candidate</li> <li>• Opened</li> <li>• Answered</li> <li>• Deleted</li> </ul>
Closed by Client	<p>Indicates whether the query was closed by a user in the Oracle InForm application:</p> <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> <li>• Blank</li> </ul>

Field	Description
Send State	<p>The delivery status of the query:</p> <ul style="list-style-type: none"> <li>• <b>Pending</b>—The query has not yet been delivered to the Oracle InForm application.</li> <li>• <b>Failed</b>—The Oracle Central Coding application could not deliver the query data to the Oracle InForm application due to an error. When you resolve the error, the Oracle Central Coding application attempts to deliver the query data again.</li> <li>• <b>DUP_TXID</b>—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 Oracle Central Coding application did not receive a confirmation due to network issues. The Oracle Central Coding application resolves this issue.</li> <li>• <b>INVAL_REV</b>—The Oracle Central Coding application cannot transfer the updates for the query to the Oracle InForm application. This can occur if a query was updated in the Oracle InForm application before it was updated in the Oracle Central Coding application. In this case, the updates from the Oracle InForm application overwrite the changes made in the Oracle Central Coding application.</li> </ul>
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

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**

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**

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.

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"> <li>Reason for change dialog box—Making changes to the item.</li> <li>Recode reason dialog box—Assigning the new code to a coded request.</li> <li>Disapprove reason dialog box—Disapproving the code for a coding request.</li> </ul> <p>1000 characters maximum.</p> <p>This field does not accept special characters. The Oracle 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

Field	Description
Deleted Term	The deleted or non-current term and associated code from the original dictionary version.
New Term	<p>The term to replace the deleted or non-current term in the new dictionary version.</p> <p>The Code link opens the Coding Browser dialog box, where you can interactively recode the synonym.</p>
Synonyms	The synonyms associated with the deleted or non-current term.
Action	<p>The action to perform on the Deleted Term.</p> <ul style="list-style-type: none"> <li><b>Selected</b>—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.</li> <li><b>Not selected</b>—The Coding Browser dialog box opens and you can recode the term.</li> </ul>

### Actions

Action	Shortcut	Description
Approve All	Ctrl+Shift+A	Saves and applies the selected Action to each synonym.



## Buttons

Button	Shortcut	Description
Approve All	Ctrl+Shift+A	Saves and applies the selected Action to each synonym.

## Reconcile Verbatim 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

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"> <li>• <b>I</b>—Interactive</li> <li>• <b>A</b>—Automatic</li> </ul>
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.

Field	Description
New Code and Term	<p>Opens the Compare Coding Results dialog box, where you can view the differences in the coding results between the original and new dictionary version.</p> <p>The new code and term appear only if the Oracle Central Coding application successfully autocoded the verbatim using the new coding definition.</p> <p>The Code link displays the code value for the term in the dictionary version.</p> <p>The Code link in parenthesis opens the Coding Browser dialog box, where you can interactively code the verbatim.</p>
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 Oracle Central Coding application applies the changes to the verbatim only after you select Approve All.
Accept Uncode	<p>If selected, the Oracle 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

Action	Shortcut	Description
Approve All	Ctrl+Shift+A	Confirms the selected actions for each verbatim.

### Buttons

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.

Field	Description
Reason	The cause of the difference in coding between the dictionary versions.

Field	Description
Difference	The element that produces different codings for a verbatim between dictionary versions.
Original Coding Mode	The type of coding originally performed on the verbatim. <ul style="list-style-type: none"> <li>• <b>I</b>—Interactive</li> <li>• <b>A</b>—Automatic</li> <li>• <b>I/A</b>—Interactive or automatic</li> </ul>
Default Action	The verbatim reconciliation option to be selected by default on the Reconcile Verbatims page, when reconciling verbatims with the corresponding Reason and Difference. <ul style="list-style-type: none"> <li>• <b>Accept New</b>—Selects the new autocode result (code, term, and dictionary path) in the New Code and Term column.</li> <li>• <b>Keep Original</b>—Selects the initial coding (code, term, and dictionary path) in the Original Code and Term column.</li> <li>• <b>Uncoded</b>—Selects the Uncode option in the Accept Uncode column.</li> </ul> <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.

Field	Description
Reason	Descriptive text about the reason to reissue the query. A Oracle 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 reasoncheckbox appears only for users who have the Manage Standard Reasons right.

## Report Requests page

The help for this page includes descriptions for core fields, actions, and buttons only.

## Fields

Field	Description
Job Scheduler Status	Indicates whether the job scheduler is running.  —The job scheduler is running.  —The job scheduler is not running.
Report Type field	A filter that identifies the items to view based on type. <ul style="list-style-type: none"> <li>• <b>Coded Items Report</b>—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.</li> <li>• <b>Coding Consistency Report</b>—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.</li> <li>• <b>Workteams, Roles, and Rights by User</b>—Provides a list of assigned work teams, roles, and rights for each active user in the system. You must enter parameters for each report type, except for the Workteams, Roles, and Rights by User report.</li> </ul>
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

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**

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****Table 22-1 Request Information**

Field	Description
Item Type	The type of item to be coded: <ul style="list-style-type: none"> <li>• AE—Adverse event</li> <li>• MEDPROD—Medical product</li> <li>• DISEASE</li> <li>• LABDATA</li> <li>• Drug</li> </ul> This information is defined in the Oracle Central Designer or Clintrial application.
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.

Table 22-1 (Cont.) Request Information

Field	Description
Note (📌) icon	Indicates that the selected coding request has a note.  Pointing to the Note icon displays the text for each entry in the note. The note entries are sorted from newest to oldest.
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.
View Codes link	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.  This link appears only if the request was coded.

Table 22-2 Request Identification

Field	Description
Client Name	The name of the source application for which the Oracle 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 Oracle 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.

**Table 22-2 (Cont.) Request Identification**

<b>Field</b>	<b>Description</b>
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.
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.

**Table 22-3 Rule Assignment**

<b>Field</b>	<b>Description</b>
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

Table 22-4 Coding Requests

Action	Shortcut	Description
Code	-	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 code propagates only to requests associated with unlocked studies.
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 Oracle Central Coding application clears the corresponding code values in 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.

Table 22-5 Approvals

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.



Table 22-5 (Cont.) 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 Oracle 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

Table 22-6 Coding Requests

Button	Shortcut	Description
Code	-	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 code propagates only to requests associated with unlocked studies.
Review Complete	Ctrl+Shift+R	Completes the review of an autocoded request. The status changes to Complete and the request is ready for approval.

Table 22-7 Approvals

Button	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.

## Roles page

The help for this page includes descriptions for core fields, actions, and buttons only.

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

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.

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"> <li>• Time (24-hour clock) to start the queue, in HH:MM format.</li> <li>• A dash (-).</li> <li>• Time (24-hour clock) to stop the queue, in HH:MM format.</li> <li>• 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 ([.]).</li> </ul> <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"> <li>• 12:30-13:15[5] Process the queue every five minutes from 12:30 PM until 1:15 PM.</li> <li>• 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.</li> </ul> <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: 7:00-13:00[4],12:00-14:00[9] 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"> <li>• Every minute in the selected hours.</li> <li>• Every hour on the selected days.</li> <li>• Every day in the selected months.</li> </ul>

### Buttons

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

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

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.

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

Field	Description
Parent	The name of the stopword list which the selected list inherited. This field appears only if the list is inherited.

## Actions

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

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

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**

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**

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.

Field	Description
Allow Auto Query by Default	Instructs the Oracle 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 Oracle 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

Field	Description
Allow Auto Query By Default	Instructs the Oracle 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 Oracle Central Coding application to close a query if the associated verbatim is successfully coded and approved.

### Buttons

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

Field	Description
Study	The name of the study.
Study Group	The name of the study group associated with the study. A study group specifies auto close and auto query settings for a subset of studies. The Oracle Central Coding application includes a default study group called System.
Application	The name of the application integrated with the Oracle Central Coding application.



Field	Description
Locked	<p>Indicates whether the study is locked () or unlocked () in the Oracle 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"> <li>• <b>Log</b> ()—opens the View Job Log page, where you can view information about the Get Requests jobs for the study and associated adapter.</li> <li>• <b>Run</b> ()—manually runs the Get Requests jobs for the study and associated adapter.</li> </ul>
Return Codes	<p>Adds a study to the Return Codes job schedule.</p> <ul style="list-style-type: none"> <li>• <b>Log</b> ()—opens the View Job Log page, where you can view information about the Return Codes jobs for the study and associated adapter.</li> <li>• <b>Run</b> ()—manually runs the Return Codes jobs for the study and associated adapter.</li> </ul>
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"> <li>• <b>Log</b> ()—opens the View Job Log page, where you can view information about the Exchange Query Updates jobs.</li> </ul>
Status	<p>Opens the View Job Log page, to view the status of the Delete Study and All Data action.</p>

## Actions

Action	Description
Reset	<p>Resets the bookmark attribute for the Oracle 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>

Action	Description
Decommission a Study	Moves request data from the current database tables to the history database tables for a study that is complete.

## [Synonym List Name] page—Edit

The help for this page includes descriptions for core fields, actions, and buttons only.

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

**Table 22-8** 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.

**Table 22-9 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**

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.
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**

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**

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**

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**

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****Table 22-10 Synonym List Information**

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.

**Table 22-11 Synonym**

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.

**Actions**

Action	Description
Code	Opens the Coding Browser dialog box, where you can interactively code the proposed synonym.

## Buttons

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 Oracle Central Coding release prior to 3.1 and migrated to Oracle SSO authentication.

### 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	Indicates whether to allow existing users to be migrated from the previous environment with native authentication to the new environment with SSO authentication. <ul style="list-style-type: none"><li>• 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 Oracle Central Coding transfers role and work team assignments to the SSO environment.</li><li>• If deselected, user accounts cannot be migrated to the Oracle SSO environment.</li></ul> It is recommended to keep the option selected until all or most existing users are migrated the Oracle SSO environment.

### 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.

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"> <li>• <b>English OS</b>—DD/MON/YYYY HH24:MI:SS</li> <li>• <b>Japanese OS</b>—YYYY/MON/DD HH24:MI:SS</li> </ul> <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>

---

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 Oracle 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.

### 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 Oracle Central Coding and Oracle InForm Adapter applications. It does not affect the user interface.</p>

---



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 Oracle Central Coding and Oracle 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 Oracle Central Coding and Oracle 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 Oracle Central Coding and Oracle 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 lockout 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 lockout 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>

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"> <li>A mix of one or more of both alphabetical (A-Z, a-z) and numeric (0-9) characters.</li> <li>At least one non-alphanumeric character ( ` ~ ! @ # \$ % ^ &amp; * ( ) _ + - = { }   [ ] \ : " ; ' &lt; &gt; ? , . / ).</li> <li>A mix of at least one or more characters of both alphabetical upper case [A-Z] and lower case [a-z].</li> </ul>
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>

### 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"> <li>Current Low Level Term (LLT), where possible.</li> <li>Preferred Term (PT).</li> <li>Low Level Term (LLT) that has the same code and term as the Preferred Term (PT).</li> </ul> <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>
Skip Auto Suggestion Step	<p>Indicates whether to skip the Auto Suggestion step in the coding algorithm and search for a possible better choice.</p>

## Query Management Options

Field	Description
Query Create User in Client	<p>A user in the Oracle InForm application with rights to create queries. The user name appears in the Oracle InForm application as the user who created the Oracle Central Coding queries for each study in the InForm application.</p> <p>In an Oracle SSO environment:</p> <ul style="list-style-type: none"> <li>For SSO-enabled Oracle InForm studies, the user name format is <i>organization_ID.username</i>. This field is case-sensitive and must match the Oracle InForm name exactly.</li> <li>For all other studies, the account name is the user name only.</li> </ul> <p>You can define a Query Create User separately for a study by entering Oracle 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 Oracle InForm application which is integrated with the Oracle Central Coding application.</p>
Allow Multiple Query Reissue	Allows a query to be reissued multiple times.

## 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.

Field	Description
Web Service Client Timeout	The amount of time (in milliseconds) to wait for the web service response before the web service client times out.
Oracle InForm Authentication User and Oracle InForm Authentication User Password	<p>The user name and password of an Oracle InForm application user created to communicate with the Oracle InForm server through web services.</p> <p>The specified user:</p> <ul style="list-style-type: none"> <li>• Is required only when username/password authentication is selected on the Adapter page for calls to the Oracle InForm Adapter Coding and Discrepancy interfaces.</li> <li>• Should have no additional rights in the InForm application.</li> <li>• Should be different from the transaction users specified in the PutCodes Client Audit User and Query Create User in Client fields.</li> </ul> <p>The Oracle InForm authentication user details are:</p> <ul style="list-style-type: none"> <li>• Valid only when both fields contain values.</li> <li>• Used either for all studies or for the studies associated with a specific adapter.</li> </ul> <p>The Oracle InForm Authentication User field is case-sensitive.</p> <p>You can define an Oracle InForm Authentication User separately for a study by entering Oracle InForm authentication user information on the Study Information Page.</p> <p>If the Oracle Central Coding application is uninstalled and then reinstalled or migrated to a new server, you must enter the user name and password again after the new installation is completed.</p> <p>For more information, see <a href="#">New Adapter/[Adapter Name] page</a>.</p>
Authentication Certificate Name	Contains the name of the authentication certificate used for signing Oracle 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**

Field	Description
Change	The change made to the dictionary term. <ul style="list-style-type: none"> <li>• <b>Add</b>—The term was added to the dictionary.</li> <li>• <b>Delete</b>—The term was deleted from the dictionary.</li> <li>• <b>Non-current</b>—The term is not current in the dictionary (MedDRA only).</li> <li>• <b>Update</b>—The term was updated in the dictionary.</li> </ul>

**Actions**

Action	Description
Export	Exports the list of changes in a Comma-Separated Value (CSV) file.

**Buttons**

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.

Field	Description
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.  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.
Site	A unique identifier for the subject site. This information comes from the source application.

Field	Description
Study	The name of the study. The name is an active link if your environment is integrated with the Oracle InForm application. The link opens the Oracle InForm application page for the study. For a Clinical One study, the link navigates to the Clinical One landing page, where all studies are listed. It does not open the study itself.
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 Oracle 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 Oracle 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.

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.

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

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**

Action	Shortcut	Description
Cancel	-	Stops a synonym list upgrade that is in process. The Oracle 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**

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**

Field	Description
Name	The system login name for the user.



Field	Description
Display Name	The screen name for the user. The display name appears in the upper-left corner of the user interface.

### Actions

Action	Description
Unmigrate	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.  The user must not be logged in. For Oracle SSO environments only.

## View Full Coding dialog box

The help for this page includes descriptions for core fields, actions, and buttons only.

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.

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.

Field	Description
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"> <li>• While getting verbatims, displays In Process.</li> <li>• While returning codes, displays the percentage of completed requests.</li> </ul>
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.

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.

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.

## Works Teams page

The help for this page includes descriptions for core fields, actions, and buttons only.

Field	Description
Assigned Work Items	The number of requests assigned to the work team.

# 23

## Default roles and rights

In this appendix:

- [Default roles](#)
- [Default rights](#)

### Default roles

The following tables list the rights assigned to the default roles for each category of rights.

**Table 23-1 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

**Table 23-2 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

**Table 23-3 Reporting**

<b>Default rights</b>	<b>Default roles</b>
Produce Report	Reporter, Oracle Services Consultant
View Report	Reporter, Oracle Services Consultant

**Table 23-4 Request Setup**

<b>Default rights</b>	<b>Default roles</b>
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

**Table 23-4 (Cont.) Request Setup**

<b>Default rights</b>	<b>Default roles</b>
View Algorithms	Dictionary Manager, Oracle Services Consultant
View Coding Definitions	Dictionary Manager, Oracle Services Consultant
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

**Table 23-5 System Administration**

<b>Default rights</b>	<b>Default roles</b>
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

**Table 23-6 User Administration**

<b>Default rights</b>	<b>Default roles</b>
Activate User	User Manager, Oracle Data Entry Team
Create Role	User Administrator, Oracle Data Entry Team
Create User	User Administrator, Oracle Data Entry Team
Create Work Team	User Administrator, Oracle Data Entry Team
Deactivate User	User Manager, Oracle Data Entry Team

**Table 23-6 (Cont.) User Administration**

Default rights	Default roles
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.

**Table 23-7 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 Oracle Central Coding application and the Oracle InForm application. The query closes only in the Oracle 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 Oracle 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.

**Table 23-7 (Cont.) Approval**

Default right	Description
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.

**Table 23-8 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 Oracle Central Coding application. Clearing the code values in the Oracle 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.
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 Oracle 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 Oracle Central Coding application should assign to all instances of the verbatim for which you suggest the synonym.
Retry Delivery	Select verbatims that are marked <b>Undeliverable</b> 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.

**Table 23-9 Reporting**

Default right	Description
Produce Report	Produce reports and exports.



**Table 23-9 (Cont.) Reporting**

<b>Default right</b>	<b>Description</b>
View Report	View report outputs.

**Table 23-10 Request Setup**

<b>Default right</b>	<b>Description</b>
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.
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.

**Table 23-10 (Cont.) Request Setup**

Default right	Description
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.

**Table 23-11 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.
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 Oracle Central Coding product, the Oracle database, and the Windows system. You can also view copyright information for the software products used with the Oracle Central Coding application.

**Table 23-12 User Administration**

<b>Default right</b>	<b>Description</b>
Activate User	Activate a user in the Oracle 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 Oracle 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.
Update Work Team	Update the name of a work team and modify work team assignments.

# Verifying and updating codes

In this appendix:

- [About the Verify Codes report](#)

## 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 Oracle 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](#).



### Note:

This is not a standard Oracle Central Coding functionality and should not be used in place of Impact Analysis to perform dictionary upgrades.

- [Generating the Verify Codes report](#)
- [Viewing the Verify Codes report](#)
- [Viewing the Verify and Update job log](#)

## 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](#).
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**.