

Oracle® Health Sciences Site Analyze Cloud Service

Using Oracle Site Analyze: For Oracle Site Select Users



Release 23.2

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Oracle Health Sciences Site Analyze Cloud Service Using Oracle Site Analyze: For Oracle Site Select Users, Release 23.2

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Preface

This preface contains the following sections:

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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>.

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.

Related resources

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

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through Support Cloud.

Contact our Oracle Customer Support Services team by logging requests in one of the following locations:

- English interface Customer Support Portal (<https://hsgbu.custhelp.com/>)
- Japanese interface Customer Support Portal (<https://hsgbu-jp.custhelp.com/>)

You can also call our 24x7 help desk. For information, visit <https://www.oracle.com/life-sciences/support/> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

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About the data dictionary, access, and user roles

Oracle Site Analyze is the reporting and visualization application that supplements reports available in the Oracle Site Select clinical study site identification application. Learn about the data dictionary, see instructions for accessing Oracle Site Analyze, and more.

Getting started with Oracle Site Analyze

Oracle Site Analyze reports allow you to view status and other data about the activities that your site identification team performs in Oracle Site Select. All report data comes from Oracle Site Select where information about sites, documents, feasibility surveys, and the status of activities related to them are tracked and managed.

A data dictionary that reflects your work

The Oracle Site Analyze data dictionary is built to provide insight on common site identification tasks. For example, site progress data can be used to build a report view a summary of where sites are in the selection process to help you to identify barriers to site progress. Similarly, cycle time data allows you to visualize elapsed time between, for instance, making a feasibility survey available to a site, and the site's completion of the survey task.

Whatever your reporting needs, one or multiple items in the Oracle Site Analyze data dictionary can meet them.

Accessing Oracle Site Analyze

If you have the appropriate permissions to access Oracle Site Analyze reports, you'll navigate to Oracle Site Analyze (Tableau) from within the Oracle Site Select application. In the Oracle Site Select top navigation bar, click Dashboards, then click "Analyze reports."

Roles control access to information

Oracle Site Analyze controls who has access to certain data views. There are two roles:

1. **business intelligence (BI)**: This super user role can view all reports and create or edit reports.
2. **view only**: Users with this role can view a subset of the standard Oracle Site Analyze reports and reports that BI users share with them.

2

About viewing reports and using Tableau

Learn about how Oracle Site Analyze displays the project dashboard and workbooks and see how users can export and share report data.

Project dashboard and workbooks

When you log into Oracle Site Analyze, you'll see a list of projects – each of these projects include workbooks that contain standard reports.

With any Oracle Site Analyze report, you can sort and filter the data. You can restore any changes you make to the original format or save them permanently. You can also turn off automatic updates, so the data you see remains consistent during your editing experience. Subscribe to reports and receive email updates daily or weekly when the report data changes.

On the Workbooks page, you can select the checkbox next to a report to access additional features.

- **Edit:** allows you to edit the report, if you have appropriate permissions
- **Download:** saves the report (you can use the Tableau desktop application to open downloaded reports)
- **Tag:** you can associate the report with a category you define; this way, you can easily find the report by filtering by the category name
- **Permissions:** allows you to determine who can view, interact with, and edit reports (if you have been granted permission to control permissions)
- **Move:** use this to move the report to another folder or project in the workbook
- **Change owner:** not enabled for view only users
- **Extract refresh:** not enabled for view only users
- **Tabbed views:** allows you to view all reports in the workbook as tabs
- **Delete:** allows you to delete the workbook, if you have appropriate permissions

Export formats

You can export your report data in the following formats:

- spreadsheet (single or multiple tab)
- Adobe Acrobat (PDF) format
- Microsoft PowerPoint
- image (PNG) format

**Note:**

If your report contains charts, graphs, or other images, those are not included when you export in spreadsheet format. Additionally, when you export a dashboard, you see only what appears on your screen; to export all pages in a report, always export the entire report.

Sharing web views

You can share Oracle Site Analyze reports with others on your study team or external partners. When you share, recipients receive an email that contains a link to view the report.

**Note:**

Anyone with whom you share a report must have Oracle Site Analyze access. However, you can export an Oracle Site Analyze report and send it to those who do not have access.

Procedures

The links below redirect to Tableau online documentation.

- [Explore and analyze data in a view](#)
- [Save your work](#)
- [Manage subscriptions](#)
- [Refresh data or pause automatic updates](#)
- [Download views and workbooks](#)
- [Use custom views](#)

3

Account Metrics

Workbook synopsis

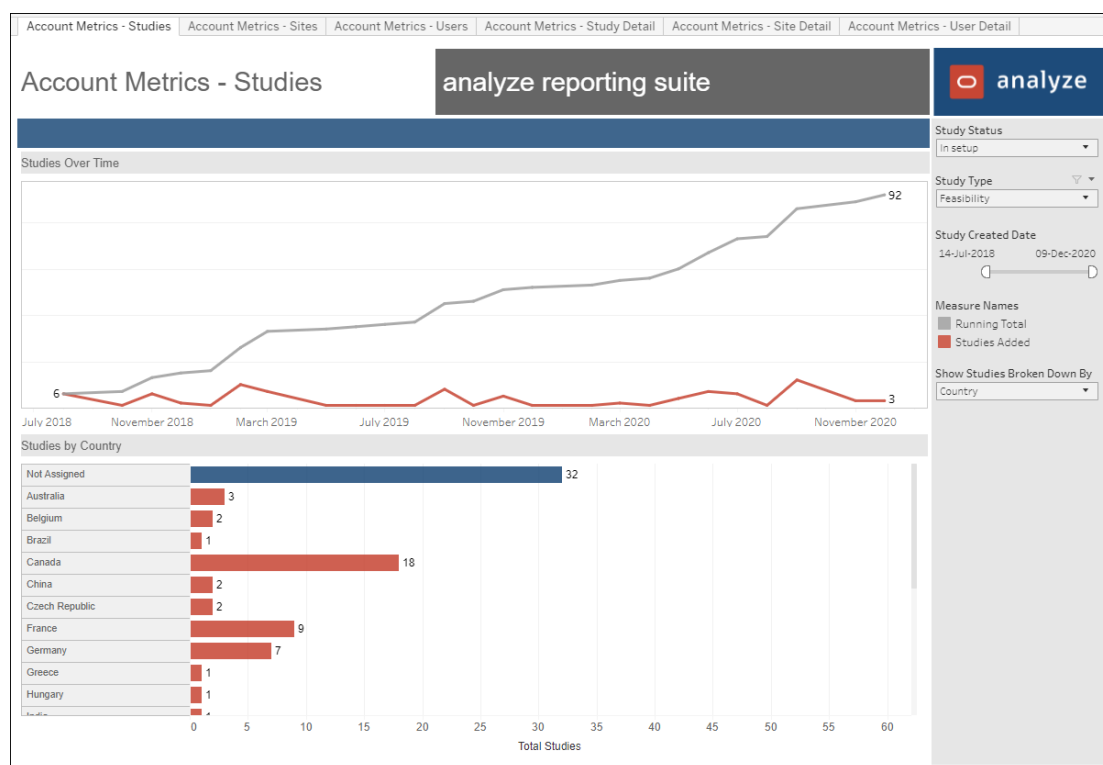
The Account Metrics report workbook, which is intended for Oracle Site Select customers, includes dashboard views of studies, sites, and Oracle Site Select users as well as detailed cross-tab sheets of each.

Dashboards and sheets

Account Metrics - Studies

The studies dashboard allows report users to view trends in studies that have been added to Oracle Site Select over time. The top portion of the dashboard includes trending and running total line graphs indicating the number of studies added per month.

Use the filters (Study Status, Study Type, and Study Created Date), in the panel to the right, to include/exclude data from the dashboard view. Use the "Show Studies Broken Down By" filter, at the bottom of the filter panel, to change the dimension (country, sponsor, or phase) displayed in the lower section of the dashboard.



Account Metrics - Study Detail

The study detail worksheet allows report users to filter details by study status, study creation date, protocol name, sponsor, study phase, and/or compound. Report users also have the ability to drill directly to site data from the hyperlinked value listed in the "Total Sites Nominated" column.

Account Metrics - Studies

Account Metrics - Sites

Account Metrics - Users

Account Metrics - Study Detail

Account Metrics - Site Detail

Account Metrics - User Detail

Account Metrics - Study Detail

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Study Name	Protocol Name	Sponsor	Study Phase	Compound	Study Created Date	Total Sites Nominated
18	DEI	Null	Phase III	Null	12-Apr-2018	90
18	122	Null	Phase IV	Null	05-Apr-2018	56
18	DEI	Null	Phase II	Null	02-Nov-2018	105
19	SSP	Null	Phase II	Null	21-Feb-2019	14
19	19	ng	Phase II	Null	05-Nov-2019	29
20	1.0		3	Null	09-Jun-2020	4
20	SSP	Skyline Pharma	2	Null	05-Jun-2020	15
20	78. 10X		2	Null	16-Sep-2020	11
_F	Null	Null	Null	Null	04-Nov-2019	0
_F	es .. _Pi	ind.	Phase I	Null	20-Sep-2019	2
Ac	90	Null	Null	Null	28-Sep-2020	0
Ac	AS	Null	1	Null	28-May-2020	57
Ac	Ac	Null	Phase I	Null	11-Sep-2017	94
ac	1	Null	Null	Null	23-Sep-2020	0
Al	Alif	Null	Phase II	Null	22-Jan-2018	457
an	24		Phase III	Null	25-Mar-2019	35
An	2		Phase I	Null	22-Mar-2019	85
Ar	17	Null	Null	Null	15-Nov-2019	0
CS	XYZ	Null	Phase II	Null	08-Nov-2018	116

Study Status

(All)

Study Type

(All)

Study Created Date

27-Jun-2017

09-Dec-2020

Protocol Name

(All)

Sponsor

(All)

Study Phase

(All)

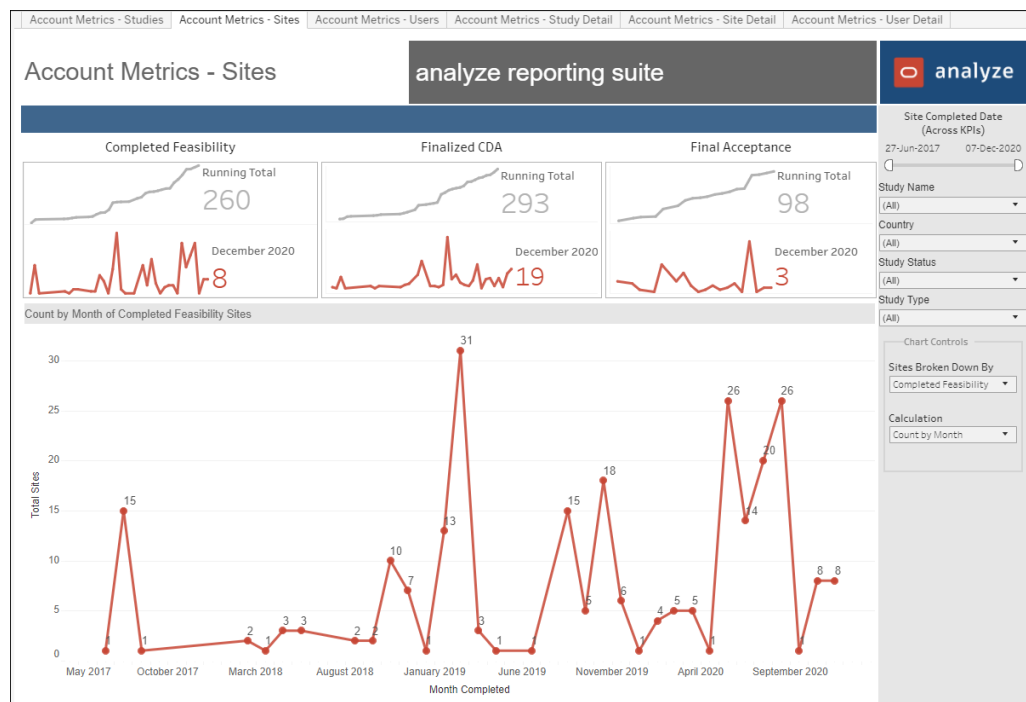
Compound

(All)

Account Metrics - Sites

The sites dashboard allows report users to view trends in sites that have completed feasibility, finalized CDAs, and achieved final acceptance in Oracle Site Select over time. Top level KPIs show total number of study sites that have completed feasibility, total number of study sites that have finalized CDAs, and total number of study sites that have reached final acceptance bucket state. A running total line graph indicates total over time and a month-by-month line graph indicates distinct number per month.

At the bottom of the dashboard, a trend vertical bar graph shows the trend in sites added per month based on the parameter a user has selected (feasibility, finalized CDA, or final acceptance). Users can display data by running total or count by month.



Account Metrics - Site Detail

The sites detail worksheet allows report users to filter details by study, country, and bucket state (e.g., do not invite, invited, short list, etc.).

Account Metrics - Studies

Account Metrics - Sites

Account Metrics - Users

Account Metrics - Study Detail

Account Metrics - Site Detail

Account Metrics - User Detail

Account Metrics - Site Detail

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Study Name	Protocol Name	Country	PI Last Name	PI First Name	Institution	Institution Type	Bucket State	PI Phone	Email	Specialty
18111_SEL3_123		Canada	Al	Shi	The	Null	Short list	6:	99 shi	om Pulmonary Disease
		China	Be	Chi	Sha	Null	Short list	N	bai	al... Null
		France	Al	Mi	Ass	Null	Short list	N	mi	p.fr Null
			Be	Jee	pe Nul	Null	Short list	N	jpb	e.fr Null
		Germany	Ar	Ste	Uni	Null	Short list	N	ste	ni... Null
			Ar	Ste	Yali	Null	Short list	N	s.a	Null
		United States	Al	Soi	Uni	Null	Short list	2:	44 soi	se... Respiratory Medici.
			Al	An	Virg	Null	Short list	8:	15 aal	Respiratory Medici.
			Al	Ge	Uni	Null	Short list	N	abl	Respiratory Medici.
			Al	Am	Duk	Null	Short list	N	aal	o... Null
									am	idu Null
			Al	Ste	Bay	Null	Short list	8:	75 sal	Foot and Ankle Ort.
										Respiratory Medici.
				Thi	Dec	Null	Short list	N	the	Pulmonary Disease
			Ac	Trz	Wai	Null	Short list	N	tki	Null
			Ac	Sai	Dep	Null	Short list	N	sar	Pulmonary Disease
			Ac	Ro	Uni	Null	Short list	N	rot	e... Respiratory Medici.
			Ac	Da	The	Null	Short list	8:	73 ad	Pulmonary Disease
										Respiratory Medici.
			Ac	Ale	Ros	Null	Short list	7:	00 Ale	k... Respiratory Medici.

Study Name

(Multiple values)

Protocol Name

(All)

Study Status

(All)

Study Type

(All)

Country

(All)

Bucket State

(All)

Institution Type

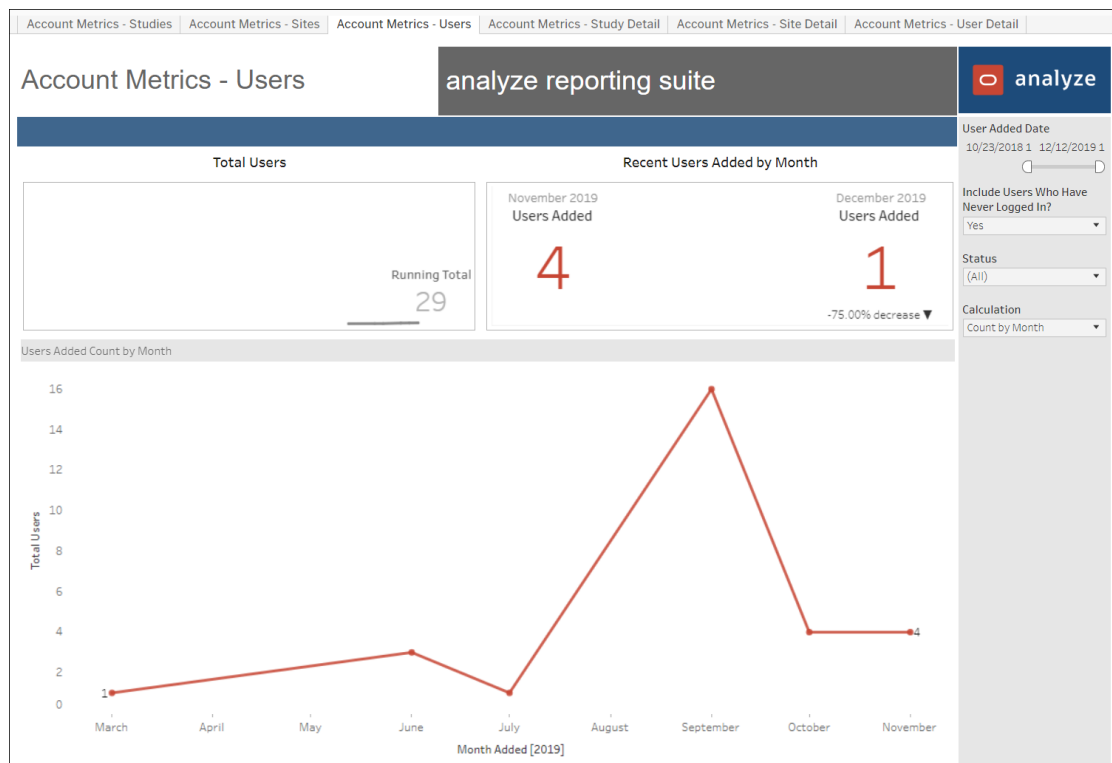
(All)

Institution

(All)

Account Metrics - Users


This dashboard allows report users to view top level KPIs for total Oracle Site Select users added, users added this month, and users added last month. The lower section of the dashboard is a trend bar chart of users added per month. The "Status" filter in the right filter panel makes it easy to toggle between including/excluding inactive users in the aggregations. Report users can also toggle this view between running total and count by month using the "Calculation" filter in the right filter panel.



Account Metrics - Studies Account Metrics - Sites Account Metrics - Users Account Metrics - Study Detail Account Metrics - Site Detail Account Metrics - User Detail

Account Metrics - User Detail

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Email	First Name	Last Name	Created	Last Login	Status
an	An	Sh	29/07/2019	29/07/2019	Active
be	Be	Te	05/03/2019	05/03/2019	Active
bo	Bo	Lai	10/09/2019	10/09/2019	Active
da	Da	Bl	10/09/2019	14/09/2019	Active
de	De	Co	09/09/2019	09/09/2019	Active
de	De	CD	09/09/2019	12/09/2019	Active
de	De	Us	11/06/2019	18/12/2019	Active
fd	Fri	Do	19/10/2017	Null	Active
gb	Joi	Se	18/09/2019	19/12/2019	Active
gb	Co	Siq	30/10/2019	Null	Active
go	Or	Co	28/10/2019	Null	Active
go	Ra	Jai	10/09/2019	26/11/2019	Inactive
go	Ra	Jai	12/09/2019	12/09/2019	Active
joe	Joi	Ze	27/06/2019	20/12/2019	Active
jui	Jui	Gn	10/06/2019	09/12/2019	Active
pli	Pri	Se	23/09/2019	Null	Active
pri	pri	lar	25/09/2019	Null	Active
pri	pri	sel	24/09/2019	26/12/2019	Active
pri	Pri	Se	26/09/2019	21/10/2019	Active
qa	QA	Ad	12/09/2019	30/09/2019	Active
qa	QA	An	12/09/2019	Null	Active
qa	QA	Co	10/09/2019	05/12/2019	Active
qa	QA	FS	10/09/2019	10/12/2019	Active
qa	QA	Se	10/09/2019	10/09/2019	Active
sir	Sti	Sti	25/10/2019	18/11/2019	Active
sir	Sir	Du	15/11/2019	Null	Active
sir	Sir	Du	15/11/2019	Null	Active
sir	Sir	er Du	15/11/2019	15/11/2019	Active
sir	Sir	Sir	18/10/2019	15/11/2019	Active
sir	Sir	Sd	07/11/2019	13/12/2019	Active
sri	Sri	An	17/07/2018	17/07/2018	Active

Created

19/10/201717/12/2019

Last Login

17/07/201826/12/2019

Include Users Who Have Never Logged In?

Yes

Status

(All)

4

Cycle Times

Workbook synopsis

The Oracle Site Analyze Cycle Times workbook, intended for Oracle Site Select customers, allows you to view detailed data related to CDA, Oracle Site Select LITE, Selection, and Survey cycle times.

Dashboards and sheets

Key Cycle Times dashboard

The Key Cycle Times dashboard allows you to configure your cycle time parameters of interest (e.g., start at CDA task available and end at CDA finalized). Choose your preferred parameters from “Select Cycle Start” and “Select Cycle End” drop-down menus.

Once you've selected parameters, the Key Cycle Times dashboard displays cycle times in a box and whisker plot, with cycle time in days. At the upper left of the dashboard, use the following filters to refine the display:

Compare data by

- All
- Region
- Country
- Study
- PI
- Workflow

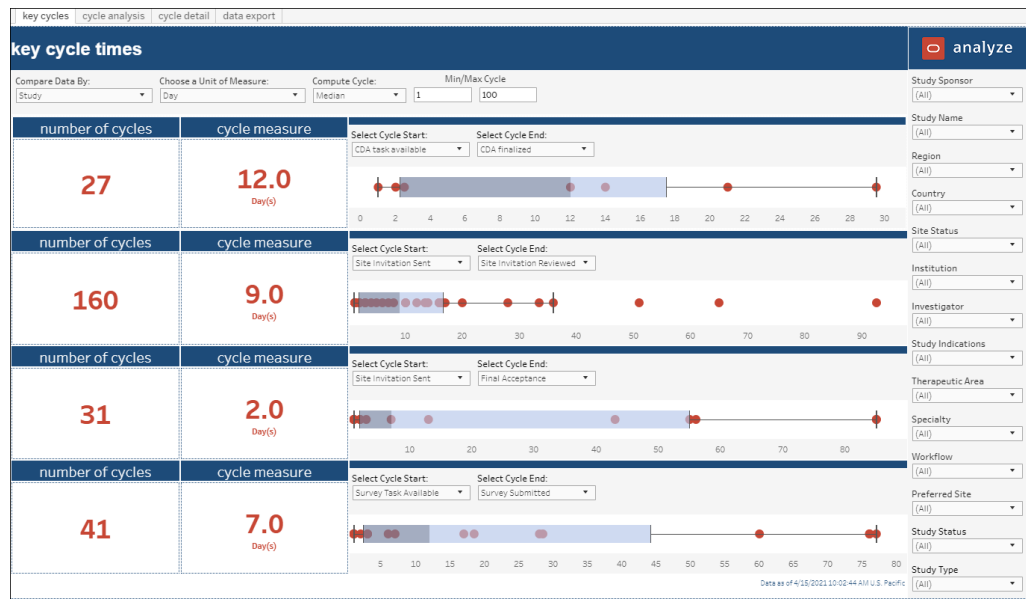
Unit of measure

- Day
- Week
- Month

Compute Cycles by

- Median
- Average

You can also specify the Minimum and Maximum cycles by entering a numerical value (1-100) in the **Min/Max Cycle** fields and use the options in the filter panel to the right to further refine the dashboard by sponsor, study, and more.

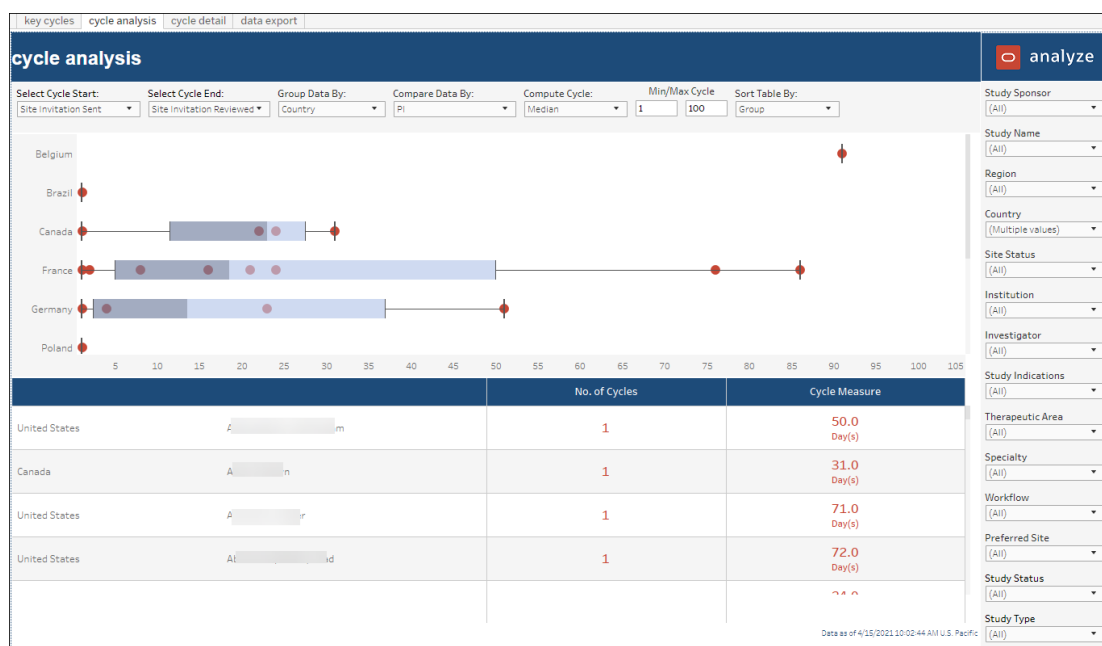


Cycle Analysis

The workbook's second sheet, Cycle Analysis, includes multiple filter options that allow you to adjust the dashboard data to your preferred views to view the data in a tabular format and box and whisker plot. You can adjust the following filters at the top of the worksheet:

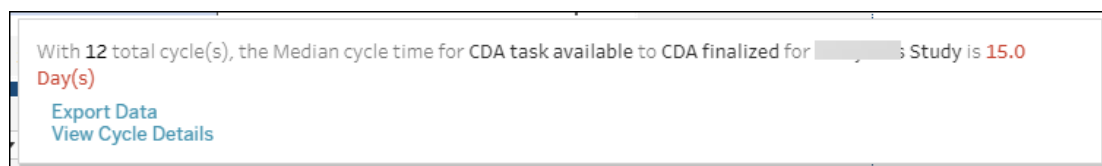
- **Cycle Start:** CDA Task Available, Site Invitation Reviewed, Site Invitation Sent, Survey Submitted, Survey Task Available
- **Cycle End:** CDA Finalized, Final Acceptance, Site Invitation Sent, Survey Submitted, Survey Task Available
- **Slice Data:** All, Region, Country
- **Compare Data:** All, Region, Country, Study, PI, Workflow
- **Compute Cycles By:** Median or Average
- **Unit of Measure:** Day, Week
- **Sort Table:** Data Slice, No. of Cycles, Cycle Median

You can also adjust data included in cycle analysis using multiple filter options (e.g., Sponsor, Study Name, Region, Country, Study Status, Study Type, and more) provided in the filter panel to the right.



Cycle Detail

On both the Key Cycle Times and Cycle Analysis worksheets, described above, you can click any cycle point in a whisker plot diagram to access a “View Cycle Details” link. That links to the Cycle Detail worksheet with the data that makes up the value in the whisker plot diagram.



key cycles | cycle analysis | cycle detail | data export

cycle detail

analyze

Study Name	Study Sponsor	Country	Institution	Investigator	Site Status	Cycle Start	Cycle Start Date	Cycle End	Cycle End Date	Cycle Time
18.1.1_3066		Canada	a	A	Invited	Site Invitation Sent	16-Feb-2021	Site Invitation Reviewed	19-Mar-2021	31
					Invited	Site Invitation Sent	02-Apr-2020	CDA finalized	20-May-2020	48
								CDA task available	20-May-2020	48
18.1.1_SEL3078		United States	University of North Carolina, Chapel Hill	D	Invited	Site Invitation Sent	09-Dec-2019	Site Invitation Reviewed	14-Jan-2020	36
					Invited	Site Invitation Reviewed	25-Sep-2019	CDA finalized	11-Dec-2019	77
										77
		United States	Washington University School of Medicine	O	Final acceptance	Site Invitation Reviewed	25-Sep-2019	CDA Finalized	26-Sep-2019	1
										1
								Final Acceptance	26-Sep-2019	1

Data as of 4/15/2021 10:02:44 AM U.S. Pacific

Study Sponsor (All) | Study Name (All) | Region (All) | Country (Multiple values) | Site Status (All) | Institution (All) | Investigator (All) | Study Indications (All) | Therapeutic Area (All) | Specialty (All) | Workflow (All) | Preferred Site (All) | Study Status (All) | Study Type (All)

Data Export

The Cycle Times report includes a Data Export worksheet that provides a downloadable version of the data used to create the cycle times metrics. This export worksheet is intended for export to CSV format.

data export															Study Sponsor
Intended for export to CSV purposes only															(All)
Study Name	Study Spon.	Region	Country	Institution	Investigator	Site Status	Workflow	Preferred S.	Cycle Start	Cycle Start Date	Cycle End	Cycle End Date	Cycle Time	Cycle Unit	Study Name
18.1.1_3066	Numer	Canada	United States	University of Michigan	A. K.	Invited	Standard tasks	No	Site Invitation Sent	16-Feb-2021	Site Invitation Reviewed	19-Mar-2021	31	day	(All)
						Invited	Standard task D sign	No	Site Invitation Sent	02-Apr-2020	CDA Finalized	20-May-2020	48	day	(All)
											CDA task available	20-May-2020	48	day	(All)
18.1.1_SEL3078	Numer	United States	Washington	University School of Medicine	C.	Invited	Standard tasks	No	Site Invitation Reviewed	25-Sep-2019	CDA Finalized	11-Dec-2019	77	day	(All)
						Final acceptance	Standard tasks	No	Site Invitation Reviewed	25-Sep-2019	CDA Finalized	26-Sep-2019	1	day	(All)
									Site Invitation Sent	25-Sep-2019	CDA Finalized	26-Sep-2019	1	day	(All)
19.4 fields testing	Numer	Canada	United States	Pediatric Mayo Clinic	A.	Invited	Standard tasks	No	Site Invitation Sent	22-Nov-2019	Final Acceptance	26-Sep-2019	1	day	(All)
						Invited	Survey	No	Site Invitation Sent	09-Jun-2020	Survey Submitted	24-Aug-2020	76	day	(All)
						Invited	Standard tasks	No	Survey Task Available	09-Jun-2020	Survey Submitted	24-Aug-2020	76	day	(All)
						Invited	Standard tasks	No	Site Invitation Sent	22-Nov-2019	Site Invitation Reviewed	25-Nov-2019	3	day	(All)
						Invited	Standard tasks	No	Site Invitation Sent	18-Jan-2020	Site Invitation Reviewed	11-Feb-2020	24	day	(All)
20.2 OO Study	Pfizer	United States	United States	University Of Iowa	A.	Selected	Standard tasks	No	Site Invitation Sent	05-Nov-2019	Site Invitation Reviewed	06-Nov-2019	1	day	(All)
									CDA Finalized	09-Jun-2020	Survey Submitted	24-Aug-2020	76	day	(All)
									CDA task available	09-Jun-2020	Survey Submitted	24-Aug-2020	76	day	(All)
									Site Invitation Reviewed	09-Jun-2020	Survey Submitted	24-Aug-2020	76	day	(All)
									Site Invitation Sent	09-Jun-2020	Survey Submitted	24-Aug-2020	76	day	(All)
									Survey Task Available	09-Jun-2020	Survey Submitted	24-Aug-2020	76	day	(All)
20.2 OO testing	Skyline Pharma	Canada	United States	Oxford Medical University	A.	Final acceptance	Standard tasks	No	Site Invitation Sent	01-Sep-2020	Final Acceptance	25-Nov-2020	85	day	(All)
									CDA task available	01-Sep-2020	Final Acceptance	25-Nov-2020	85	day	(All)
									Site Invitation Reviewed	01-Sep-2020	Final Acceptance	25-Nov-2020	85	day	(All)
									Site Invitation Sent	08-Jun-2020	Survey Submitted	24-Aug-2020	77	day	(All)
									Survey Task Available	08-Jun-2020	Survey Submitted	24-Aug-2020	77	day	(All)
20.3 _Testing_123456_p Pfizer	EMEA	France	United States	Oxford University	B.	Final acceptance	Standard + no CDA	No	Site Invitation Reviewed	17-Sep-2020	Final Acceptance	24-Sep-2020	7	day	(All)
											Survey Submitted	24-Sep-2020	7	day	(All)
									Site Invitation Sent	17-Sep-2020	Survey Task Available	24-Sep-2020	7	day	(All)
											Final Acceptance	24-Sep-2020	7	day	(All)
											Survey Submitted	24-Sep-2020	7	day	(All)
											Survey Task Available	24-Sep-2020	7	day	(All)

5

Next Actions

Workbook synopsis

The Oracle Site Analyze Next Actions dashboard, intended for Oracle Site Select customers, allows you to monitor site task progress by surfacing available tasks as well as how many days a task has been available. Use this information to evaluate when to follow up with sites who may have tasks that have not progressed for an extended period.

Dashboards and sheets

Next Actions

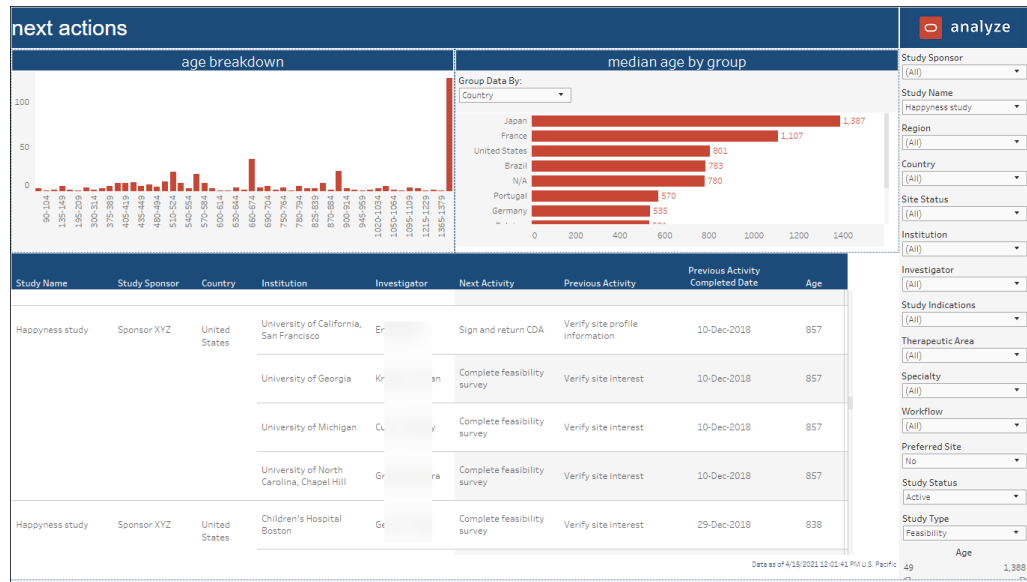
The top of the Next Actions dashboard includes two bar charts. The left chart, Age Breakdown, shows the number of available tasks by number of days the tasks have been available. The chart to the right, Median Age by Group, shows median activity age, and you can adjust this chart to show median by:

- — Assigned user
 - Study
 - Region
 - Country

Click any bar in the Age Breakdown or Median Age by Group bar chart to filter the lower section of the report, which is a tabular view of following data:

- — Study Name
 - Study Sponsor
 - Country
 - Institution
 - Investigator
 - Next Activity
 - Previous Activity
 - Previous Activity Completed Date
 - Age

The filter panel to the right provides a wide range of filters so you can easily subset the report data to a preferred view. In addition to standard filters (e.g., Study Sponsor, Study Name, Region, etc.) the right panel also includes Workflow, Preferred Site, Study Status, Study Type, and Age range filters.



6

Notes Report

Workbook synopsis

The Oracle Site Analyze Notes Report, intended for Oracle Site Select customers, allows you to view and export notes for one or more studies.

Dashboards and sheets

Notes Report

The Notes Report worksheet provides a tabular view of notes composed for a study. You can optionally filter the report by entering up to five comma-separated search terms at the upper left. Specify:

- **Search Type:** And or Or
- **Search Target:** All columns or Notes only
- **Case Sensitivity:** Yes or No

Multiple filter options, to the right, allow you to tailor the available data to your preferred view before exporting. For instance, this worksheet allows you to specify Date Range, Study, Bucket, Bucket State, Note Creator, and more.

Notes Report									
Enter up to 5 search terms, separated by a comma (e.g. CDA, site delay)									
Search Type		Search Target		Case Sensitive		Date Range of Note			
And		Notes		No		27-Jun-2017 06-Apr-2021			
Study Name	Bucket	Bucket State	PI Name	Institution	Country Name	Context	Created By	Created At	Note Text
Happyness study				Mount Sinai Hospital and School of Medicine (NY)	United States	Site workflow	CI	04-Apr-2018 06:40:29 PM	Do not have equipment/facilities
							M	05-Nov-2018 10:09:06 PM	Complex protocol
				Children's Hospital Boston	United States	Site workflow	CI	29-Dec-2018 12:19:58 AM	Do not have equipment/facilities
							M	17-Jun-2019 12:26:19 AM	A brand new note
				Baylor University	United States	Evaluate - Nominated	M	21-Jan-2020 07:40:38 PM	Approved
							M	07-Dec-2018 10:09:21 PM	Assigned to the wrong person.
				University Hospital, Rouen	France	Document reviewer assignment	M	23-May-2019 12:23:42 PM	Has contractual approval system
				New York Presbyterian Hospital	United States	Evaluate - Short list	pi	23-May-2019 12:28:53 PM	The site is shortlisted
				University of Pennsylvania	United States	CDA Submission	D	20-Nov-2019 11:51:25 PM	Wet ink after D-Sign submitted
				University of Alabama-Birmingham	United States	Fully executed CDA	pi	23-Sep-2019 07:02:37 AM	This site approved for study
							Pr	25-Sep-2019 04:30:20 PM	Please review CDA

Notes Export

The Notes Export worksheet is a simple tabular format designed to be downloaded using Tableau Download. Like the Notes Report worksheet described above, this worksheet also provides a wide range of filters that allow you to filter the data included in the export before downloading.

Notes Report

Notes Export

Notes Export

Study Name	Bucket	Bucket State	PI Name	Institution	Country Name	Context	Created By	Created At	
Happyness study	select	Declined	J. [redacted] h	Medizinische Universität Wien	Germany	Select - Declined	M [redacted]	21-Jan-2020 07:13:15 PM	I don't like this study
		Invited	K. [redacted]	Children's Clinic	United States	Fully executed CDA	Q. [redacted]	27-Jan-2020 09:53:10 PM	Fully executed CDA

Date Range of Note

27-Jun-2017

06-Apr-2021

Sponsor

☐ (All)

☐ Null

☒ B

Created By

☒ (All)

☐ [redacted]

☒ [redacted]

Investigator

☐ (All)

☐ Null

☒ [redacted]

Study Indications

☐ (All)

☐ Null

☒ [redacted]

Specialties

☒ (All)

☐ Null

☒ [redacted]

Therapeutic Area

☐ (All)

☐ Null

☒ Autoimmune/Inflammation

Assigned User

☒ (All)

☐ Null

☒ [redacted]

Institution

☒ (All)

☐ Null

☒ AAA

Region

☒ (All)

☐ Null

☒ APac

Country Name

☒ (All)

☐ Null

☒ Argentina

Study Phase

☒ (All)

☐ Null

☒ 1

Study

☐ (All)

☐ Null

☒ 18.1.1 3066

Resource Allocation

Workbook synopsis

The Resource Allocation report, helps managers track and manage assignment of Oracle Site Select user roles, business permissions, and study level access.

Dashboards and sheets

Users and Roles dashboard

The Users and Roles dashboard allows managers to easily view how business roles are defined in Oracle Site Select and which permissions are enabled/disabled for each business role. To help manage permissions across Oracle Site Select, you can also view all roles enabled for any individual user.

The upper section of the Users and Roles dashboard displays:

- Total users with (number selected)
- Total roles with (number enabled)
- Total permissions with (number enabled)

The center of the dashboard includes two tables: Users and Roles

1. **Users** – Includes the individual user's email, name, and enabled permissions count. When you click a table row for an individual user, the "Permissions" table at the bottom of the dashboard filters to display permission details (e.g., name, description, role, group, and enabled/disabled) for that user.
2. **Roles** – Shows each role with "Enabled" (blue) and "Disabled" (red). When you click a role, the lower section of the "Permissions" table at the bottom of the dashboard filters to display permission details related to the selected role.

The dashboard includes multiple filter options in the right panel that allow you to subset users and roles data to your preferred view. Filters like User Name, Email, Roles, etc. apply to the dashboard as a whole, while those in the "Grid Filters" section (Filter Disabled Permissions, Permission Group, and Permission Name) apply only to the Permissions table.

Once you specify preferred filters on the Users and Roles dashboard, the "Generate Export" button in the right filter panel provides a convenient way to download resource allocation detail. By default, filters currently specified on the Users and Roles Dashboard are automatically applied to the export sheet; however, you can adjust the export sheet filters (or remove them) as desired. You can also navigate directly to the Export Users and Roles worksheet to create an export, if preferred.

Resource Allocation - Users and Roles

Total Users

113

(110 selected)

Total Roles

41

(39 enabled)

Total Permissions

31

(29 enabled)

Users

ar	m	An	24
ar		An	2
at		An	1
at		An	0
at		An	0
bc		Be	0
bc	.com	Bo	1
cb		Cei	16
di	gmal..	Da	4
di		De	3
di		De	2

Roles

Analyze access	Enabled
API Admin	Enabled
Assigned CDA negotiator	Enabled
BP collaborator manager	Enabled
Business partner collaborator user	Enabled
CDA Approver	Enabled
CDA Counter Signer	Enabled
CDA Manager	Enabled
CDA Negotiation	Enabled
CDA Uploader	Enabled
Country Manager/CRA	Enabled
Dashboard Viewer	Enabled
Data Export Manager	Enabled
Data exporter	Enabled

User Permissions

Permission Name	Permission Description	Role Name	Permission Group	
Add sites to the short list during Evaluation	Add sites to the short list during Evaluation.	Country Manager/CRA	Site Selection	Enabled
		Everything except bp	Site Selection	Enabled
		GIS	Site Selection	Enabled
		Nomination with short list	Site Selection	Enabled
		Select User	Site Selection	Enabled
		Site Selection Approver	Site Selection	Enabled
		Study Manager	Site Selection	Enabled
Analyze reports	Access Analyze reports.	Analyze access	Reporting	Enabled
		Everything except bp	Reporting	Enabled
API and Authentication Management	Manage API interactions and Authentication settings for account.	API Admin	Account Management	Enabled
		Everything except bp	Account Management	Enabled
Business partner collaborator	User in the Business Partner collaborator's account that can be.	Business partner collaborator u.	Business Partner Collaboration	Enabled
CDA counter-signer	Select users assigned this permission are listed as available CDA counter-signers if digital signatures is enabled in the assigned ..	CDA Counter Signer	CDA/Document Management	Enabled
		Everything except bp	CDA/Document Management	Enabled
CDA/Document Template	Upload study CDA/document template.	CDA Manager	CDA/Document Management	Enabled

Grid Filters

Filter Disabled Permissions...
Yes
Permission Group
(All)
Permission Name
(All)

Resource Allocation - Users and Roles

Export Users and Roles

Full Name	Email	Roles	Role Description	Permission Group	Permission Name	Permission Description	User Active	Permission Enabled
Da	ird	da	no.	CDA Approver	CDA/Document Management	Review and Approve All CDA/D.	Active	Enabled
				Data exporter	Reporting	Self service tabular data export tool with configurable columns.	Active	Enabled
				Nomination with short list	Site Selection	Add sites to the short list dur.	Active	Enabled
				Send Design CDA	CDA/Document Management	Send CDAs for digital signature.	Active	Enabled

Full Name

(All)

Email

(All)

Roles

(All)

Permission Group

(All)

Permission Name

(All)

Filter Disabled Permissions

Yes

Filter Unused Roles

No

Filter Users with No Permissions

Yes

Filter Inactive Users

Yes

Teams and Collaboration

The Teams and Collaboration dashboard provides a convenient way for managers to track the ability for individual users to access specific Oracle Site Select studies through team assignment. Similar in design to the Users and Roles dashboard, the Teams and Collaboration dashboard displays:

- All existing teams for a specific account
- All enabled/disabled permissions for each team in an account

The dashboard itself is easily filtered using a single click. You can choose a Oracle Site Select user's name, a role, or a permission to view information about the selected item. For instance:

- Click a team name and the dashboard displays a list of all studies members of that team can view

- Click a user's name and the dashboard displays all teams that user is assigned to and all Oracle Site Select studies the user can view

The report also provides multiple filter options in the right panel to subset data to your preferred view. Filters like User Name, Team Name, Email, and Roles apply to the dashboard as a whole, while those in the “Grid Filters” section (Filter Disabled Permissions and Permission Name) apply only to the dashboard's Permissions table.

Once you specify preferred filters on the Teams and Collaboration dashboard, the “Generate Export” button in the right filter panel provides a convenient way to download resource allocation detail. By default, filters currently specified on the Teams and Collaboration dashboard are automatically applied to the export sheet; however, you can adjust the export sheet filters (or remove them) as desired. You can also navigate directly to the Export Teams and Collaboration worksheet to create an export, if preferred.

Resource Allocation - Users an... Resource Allocation - Teams an... Export Users and Roles Export Teams and Collaboration

Resource Allocation - Teams and Collaboration

Select a user, team, study, or permission from the lists below to view all associated records.

Total Team Users

16
(16 selected)

Total Teams

18
(17 associated)

Total Team Studies

81
(24 Associated)

Total Team Permissions

31
(19 enabled)

Team Users

Teams

Team Name	Role
analyze report test - crazy	Member
Anusha team	Member
CDA counter signer for Cardio studies	Member
cda review only	Member
Coral	Member
Crazy team	Member
Happy & Crazy reports	Member
Happy Team	Member

Study Access

Study Name	Access
18.1.1_3066	Allowed
18.1.1_SEL3078	Allowed
18.3.1 CDA Test	Allowed
19.1 Analyze Survey Study	Allowed
19.4 Flex fields testing	Denied
_PW - 19.4 Test	Denied
_PW - preferred / standard sites survey dupe test	Denied
Acidity	Allowed

Team Permissions

Permission Name	Permission Description	Team Name	Permission Group	Enabled
Add sites to the short list during Evaluation	Add sites to the short list during Evaluation.	analyze report test - crazy	Site Selection	Enabled
		Coral	Site Selection	Enabled
		Crazy team	Site Selection	Enabled
		Happy Team	Site Selection	Enabled
		Jody_Team	Site Selection	Enabled
		Reports team	Site Selection	Enabled
		test	Site Selection	Enabled
Analyze reports	Access Analyze reports.	analyze report test - crazy	Reporting	Enabled
		Coral	Reporting	Enabled
		Crazy team	Reporting	Enabled
		Happy & Crazy reports	Reporting	Enabled
		Happy Team	Reporting	Enabled

Grid Filters

Filter Disabled Permissi...
Yes

Filter Inactive Users
Yes

Generate Export

Permission Name
(All)

Resource Allocation - Users an... Resource Allocation - Teams an... Export Users and Roles Export Teams and Collaboration

Export Teams and Collaboration

Full Name	Email	Team Name	Team Description	Study Name	Permission Group	Permission Name	Permission Description	User Active	Permission Enabled
Bel...	ek...	analyze report test - crazy		18.1.1_3066	CDA/Document Management	CDA/Document Template Uplo...	Upload study CDA/document template.	Active	Enabled
						Negotiation for assigned CDA/...	Negotiate assigned CDA/document submissions only. This per...	Active	Enabled
						Review and Approve All CDA/D...	Review and approve all CDA/document submissions.	Active	Enabled
						Review and Approve Assigned...	Review and approve assigned CDA/document submissions only.	Active	Enabled
					Reporting	Analyze reports	Access Analyze reports.	Active	Enabled
						View Dashboards	View analytical dashboards.	Active	Enabled
					Site Management	Edit Site Profiles	Make changes to profile information for sites, verify site profil...	Active	Enabled
						Export Sites to Activate	Export sites from goBaltic Select into goBaltic Activate.	Active	Enabled
					Site Selection	Add sites to the short list dur...	Add sites to the short list during Evaluation.	Active	Enabled
						Review and Approve All CDA/D...	Add sites to the Selection bucket during Finalization.	Active	Enabled
						Site Nomination, Evaluation a...	Search for sites, add and reject sites to study, put sites on hold.	Active	Enabled
					Study Management	Email Template Management	Review, edit and approve email templates.	Active	Enabled
						Select Site Workflow Configu...	Configure Select Site workflow and upload documents on behal...	Active	Enabled
						Study Setup Management	Upload study protocols, set study parameters, milestones and...	Active	Enabled
					Survey Management	Feasibility Survey Management	Configure feasibility survey and survey testing for study.	Active	Enabled
				18.1.1_SEL3078	CDA/Document Management	CDA/Document Template Uplo...	Upload study CDA/document template.	Active	Enabled
						Negotiation for assigned CDA/...	Negotiate assigned CDA/document submissions only. This per...	Active	Enabled
						Review and Approve All CDA/D...	Review and approve all CDA/document submissions.	Active	Enabled
						Review and Approve Assigned...	Review and approve assigned CDA/document submissions only.	Active	Enabled
					Reporting	Analyze reports	Access Analyze reports.	Active	Enabled
						View Dashboards	View analytical dashboards.	Active	Enabled
					Site Management	Edit Site Profiles	Make changes to profile information for sites, verify site profil...	Active	Enabled
						Export Sites to Activate	Export sites from goBaltic Select into goBaltic Activate.	Active	Enabled

Full Name
(All)

Email
(All)

Team Name
(All)

Permission Group
(All)

Permission Name
(All)

Filter Disabled Permissions
Yes

Filter Users with No Permissi...
Yes

Filter Inactive Users
Yes

8

Select Account Reconciliation Dashboard

Workbook synopsis

The Select Account Reconciliation Dashboard report provides metrics that help managers understand monthly study volumes and evaluate the total cost of Oracle Site Select for the business.

Dashboards and sheets

Select Account Reconciliation Dashboard

The Select Account Reconciliation dashboard displays the following top-level Key Performance Indicators:

- Active Studies This Month
- Active Studies Last Month
- Active Studies This Contract Cycle
- Studies Remaining This Contract Cycle
- Total Contract Fees This Year

The center of the dashboard includes a tabular data chart with monthly active study totals, as well as a trend line chart showing active studies per month. Report users can click any month in the chart to filter the table at the bottom of the dashboard.

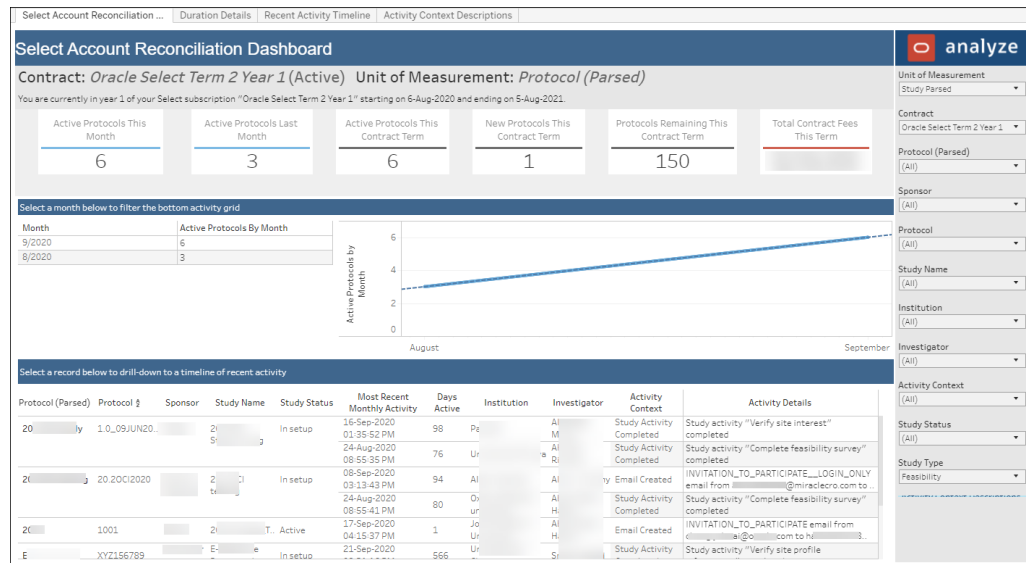
The bottom table includes the following study metadata columns:

- Protocol
- Sponsor
- Study Name
- Study Status
- Most Recent Monthly Activity
- Days Active
- Institution
- Investigator
- Activity with Context

Report users can quickly drill to a study's activity timeline (sample below) by clicking any study name in the bottom table.

Using the filter panel to dashboard's right, report users can filter the dashboard by Contract, Sponsor, Protocol, and more. Note that the "Unit of Measurement" filter includes a "Study Parsed" option. Study Parsed is the study's protocol value, which Oracle Site Analyze parses from the Study Name field. This filter option allows report users to group the dashboard data by either Study Name or Study Parsed unit of measurement. The Unit of Measurement selection affects dashboard labels as well. For instance, when a report user selects Study Parsed for Unit of Measurement, the dashboard automatically updates "Active Studies this

Month" to "Active Protocols this Month." This type of context change also happens automatically in the right-side filter panel, where the "Study" filter automatically updates to "Protocol (Parsed)."



Duration Details

The report's Duration Details worksheet provides the following detail:

- Study Created On timestamp
- First Activity Date timestamp
- Latest Activity Date timestamp
- Total Days Active

Familiar filters (e.g., Sponsor, Investigator, Institution, etc.) are available in the right side panel. Note that the filter panel also includes the updated "Unit of Measurement" filter (described above) with Study and Study Parsed options that allow the report user to see how long the study or protocol has been active.

Duration Details							analyze
Protocol (Parsed)	Total Studies	Study Created On	First Activity Date	Latest Activity Date	Total Days Active	Unit of Measurement	
Zi	1	9/16/2020 1:57:29 PM	9/16/2020 2:26:29 PM	9/17/2020 4:15:37 PM	1	Study Parsed	
Zi	1	6/5/2020 8:39:40 PM	6/5/2020 8:47:35 PM	9/8/2020 3:13:43 PM	95	Contract	
Zi	1	6/9/2020 6:57:55 PM	6/9/2020 7:18:44 PM	9/16/2020 1:35:52 PM	99	Oracle Select Term 2 Y...	
Jc	1	3/17/2020 6:03:12 PM	3/23/2020 1:14:58 AM	9/21/2020 6:32:49 PM	188	Protocol (Parsed)	
Jc	1	3/20/2019 9:03:38 PM	3/20/2019 9:05:02 PM	9/18/2020 2:56:56 PM	548	(All)	
E	1	3/5/2019 6:21:15 PM	3/5/2019 8:24:05 PM	9/21/2020 8:31:16 PM	566	Created This Contract Year	

(All)
 Sponsor
 (All)
 Study Name
 (All)
 Protocol
 (All)
 Investigator
 (All)
 Institution
 (All)
 Study Status
 (All)
 Study Type
 Feasibility

Recent Activity Timeline

The Recent Activity Timeline worksheet will help managers evaluate elapsed time for activity completion. The worksheet provides a tabular view of the following metadata:

- Protocol
- Sponsor
- Study Name
- Activity Date
- Days Active
- Institution
- Investigator
- Activity with Context

The filter panel to the right allows users to subset the view by Sponsor, Study Name, Institution, and more.

Recent Activity Timeline											analyze reporting suite	
Protocol (Parsed)	Protocol	Sponsor	Study Name	Study Status	Activity Date	F	Days Active	Institution	Investigator	Activity Context	Activity Details	Activity Date Range
2017-09-15	1	N.	2017-09-15	In setup	16-Sep-2020 01:35:52 PM	98	Pt	A	A	Study Activity Completed	Study activity "Verify site interest" completed	27-Jun-2017 21-Sep-2020
					16-Sep-2020 01:35:49 PM	98	Pt	A	A	Study Activity Completed	Study activity "View protocol" completed	Sponsor (All)
					16-Sep-2020 01:35:45 PM	98	Pt	A	A	Select Lite File Downloaded	Protocol Protocol_Country.pdf downloaded.	Study Name (All)
					16-Sep-2020 01:35:45 PM	98	Pt	A	A	Select Lite File Updated	Protocol Protocol_Country.pdf updated.	Institution (All)
					16-Sep-2020 01:35:43 PM	98	Pt	A	A	Study Activity Completed	Study activity "Agree to confidentiality statement" completed	Activity Context (All)
					16-Sep-2020 01:35:42 PM	98	Pt	A	A	Select Lite File Downloaded	Confidentiality statement Master_Protocol_2.pdf downloaded.	Investigator (All)
					16-Sep-2020 01:35:42 PM	98	Pt	A	A	Select Lite File Updated	Confidentiality statement Master_Protocol_2.pdf updated.	Protocol (Multiple values)
					16-Sep-2020 01:35:37 PM	98	Pt	A	A	Study Activity Completed	Study activity "Verify site profile information" completed	Study Status (All)
					16-Sep-2020 01:32:52 PM	98	Pt	A	A	Email Created	INVITATION_TO_PARTICIPATE email from [redacted]@ba.	Study Type Feasibility
					16-Sep-2020 01:32:51 PM	98	Pt	A	A	Select Lite File Created	Protocol Protocol_Country.pdf created.	
					16-Sep-2020 01:32:51 PM	98	Pt	A	A	Select Lite File Created	Confidentiality statement Master_Protocol_2.pdf created.	
					16-Sep-2020 01:31:23 PM	98	Pt	A	A	Site Moved to Short List	Site Moved to Short List	
					16-Sep-2020 01:29:22 PM	98	M	Ev	t	Select Lite File Created	Protocol Protocol_Country.pdf created.	
					16-Sep-2020 01:29:22 PM	98	M	Ev	t	Select Lite File Updated	Protocol Protocol_Country.pdf updated.	
					16-Sep-2020 01:29:22 PM	98	M	Ev	t	Select Lite File Created	Template CDA Country_Contracts_Template.doc created.	
					16-Sep-2020 01:29:22 PM	98	M	Ev	t	Select Lite File	Template CDA Country_Contracts_Template.doc	

Activity Context Descriptions

The Account Reconciliation report also includes a Activity Context Descriptions worksheet that defines standards for activities. Report users can refer to one source to see:

- Activity Context – The activity name (e.g. Study Created, CDA Approved, or Survey Submitted)
- Action Completed By – The actor (e.g. Site, Sponsor/CRO, Site or Sponsor/CRO user on behalf of site)
- Activity Context Description – Standardized activity description

Report users can access the definitions worksheet from a new link in the Select Account Reconciliation Dashboard's filter panel or by navigating to the Activity Context Descriptions tab.

Select Account Reconciliation ...	Duration Details	Recent Activity Timeline	Activity Context Descriptions
Activity Context Descriptions			
Activity Context	Action Completed By	Activity Context Description	
CDA Approved	Site	Confidential disclosure agreement completed by site	
CDA Uploaded	Sponsor/CRO	Confidential disclosure agreement uploaded	
Disinterest Reason Created	Site or Sponsor	Site disinterest reason added - comment added to system for specific site disinterest	
Disinterest Reason Updated	Site or Sponsor	Site disinterest reason updated - note is changed after initial add	
Email Created	Sponsor/CRO	New email record generated - occurs when email communication is sent to site(s) such as CDA, study invitation	
Exclusion Reason Created	Sponsor/CRO	Site exclusion reason added to indicate why site will not be included in study	
Exclusion Reason Updated	Sponsor/CRO	Site exclusion reason updated - original reason is edited by user	
Select Lite File Created	Site or Sponsor/CRO user on behalf of site	File uploaded by Select Lite user	
Select Lite File Downloaded	Site or Sponsor/CRO user on behalf of site	File downloaded by Select Lite user	
Select Lite File Updated	Site or Sponsor/CRO user on behalf of site	File updated by Select Lite user	
Select Lite File Uploaded	Site or Sponsor/CRO user on behalf of site	File uploaded by Select Lite user	
Site Accepted	Sponsor/CRO	Site is moved to Final Acceptance	
Site Created	Sponsor/CRO	Site from master list is associated with a specific study and moved beyond the master list	
Site Declined	Sponsor/CRO	Site is moved to Final Declination	
Site Moved to Short List	Sponsor/CRO	Site moved to the short list	
Site Selected	Sponsor/CRO	Site reached selection	
Study Activity Completed	Site	Select Lite workflow activity e.g: view protocol, sign/return CDA, view CDA is completed	
Study Created	Sponsor/CRO	Study added in Select	
Survey Completed by Site	Site	Survey submitted by a site	
Survey Submitted	Site or Sponsor/CRO user on behalf of site	Survey submitted by CRO/sponsor on behalf of a site	

9

Site Profile

Workbook synopsis

The Site Profile Report provides Oracle Site Select users with another method to evaluate site data and make more informed site selection decisions. This report provides a single location where report users can view their CTMS/data warehouse trial data that has been imported *into* Oracle Site Select alongside study data generated *by* Oracle Site Select. For example:

- Trial data from CTMS/data warehouse could include:
 - Study experience
 - Enrollment performance
 - Types of studies
- Study data from Oracle Site Select might include:
 - Survey results
 - Cycle times
 - Study interest

Dashboards and sheets

Site Summary Dashboard

The upper section of the Site Summary Dashboard worksheet is a bar chart with slider filters for:

- Number of studies participated in
- Enrollment performance
- Average survey score
- Average Selection Cycle Time

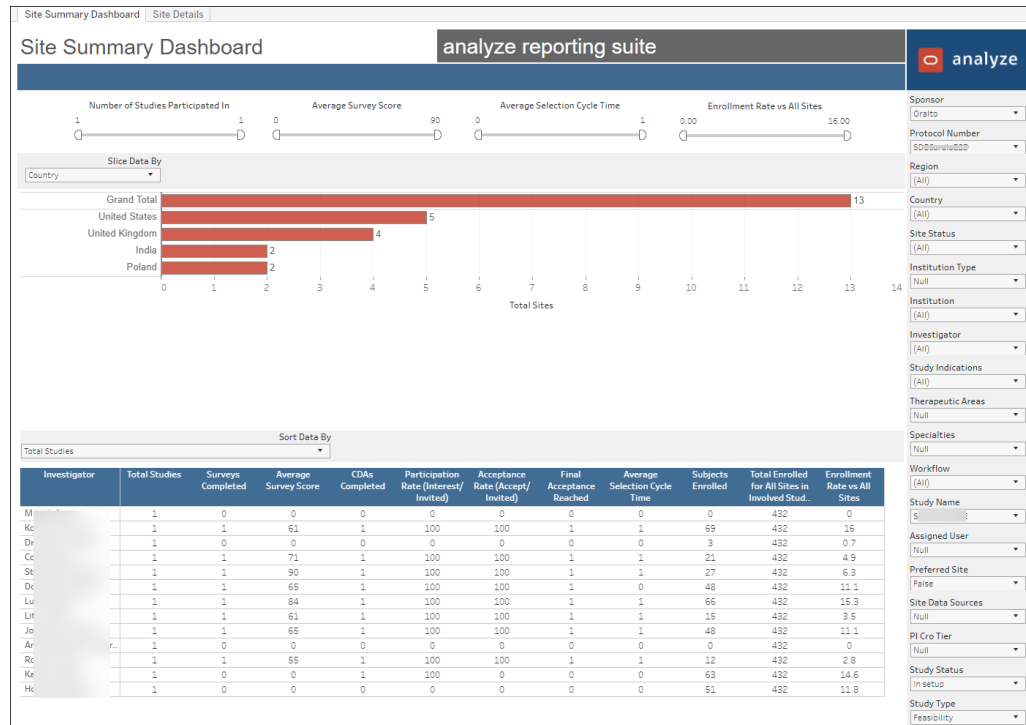
Report users can adjust the filters to a preferred view and the bar chart can be filtered by Country, Study Name, and Therapeutic Area. The number of sites included in the selected filter criteria displays at the dashboard's upper left.

The lower section of the report presents results, by Principal Investigator, in a tabular format. The table includes the following aggregation metrics, any of which can be used to sort the table:

- Studies participated in
- Enrollment performance (calculation based on relative performance per study (1-10 scale))
- Number of Surveys completed
- Average survey score
- Number of CDAs completed

- Average CDA cycle time
- Number of Final acceptances
- Average Selection Cycle time

Report users can drill down from the site aggregation metrics to the Site Details Dashboard (described below).



Site Details

The Site Details worksheet is the drill down view to each of the individual studies in which a site participated. The worksheet presents the following data in a tabular view:

- PI Name
- Study Name
- Protocol
- Therapeutic Area
- Phase
- Country
- Institution
- Enrollment Performance
- Survey Score
- Selection Cycle Time

Site Summary Dashboard

Site Details

analyze reporting suite

analyze

Sort Data By: Total Studies

Investigator	Therapeutic Areas	Protocol Number	Trial Phase	Country	Institution	Selection Cycle Time	Subjects Enrolled per Site	Survey Score	
Mi	Null	SC	E	Null	India	Hospital of Delhi	Null	0	Null
Ko	Null	SC	E	Null	United Kingdom	London Hospital	1	69	183
Dr	Null	SC	E	Null	Poland	Warsaw General	Null	3	Null
Co	Null	SC	E	Null	United Kingdom	Leeds City Hospital	1	21	213
St	Null	SC	E	Null	United States	Northeast Clinic	1	27	270
Dc	Null	SC	E	Null	United Kingdom	Bristol Infirmary	0	48	195
Lu	Null	SC	E	Null	United States	Community Clinic	1	66	252
Lit	Null	SC	E	Null	United States	Boston General	1	15	183
Jo	Null	SC	E	Null	United States	University Hospital	1	48	195
An	m	SC	E	Null	India	Chennai Clinic	Null	0	Null
Ro	Null	SC	E	Null	United States	MA Medical Center	1	12	165
Ka	Null	SC	E	Null	Poland	Krakow University	Null	63	Null
Hc	Null	SC	E	Null	United Kingdom	Reading General	Null	51	Null

Sponsor

Oratio

Protocol Number

SC

Region

(All)

Country

(All)

Site Status

(All)

Institution Type

Null

Institution

(All)

Investigator

(All)

Study Indications

(All)

Therapeutic Areas

Null

Specialties

Null

Workflow

(All)

Study Name

Sponsor

Assigned User

Null

Preferred Site

False

Site Data Sources

Null

PI Cro Tier

Null

Study Status

In setup

Study Type

Feasibility

Site Progress

Workbook synopsis

The Oracle Site Analyze Site Progress report, intended for Oracle Site Select customers, allows you to view a summary of where sites are in the selection process and helps you to identify barriers to site progress.

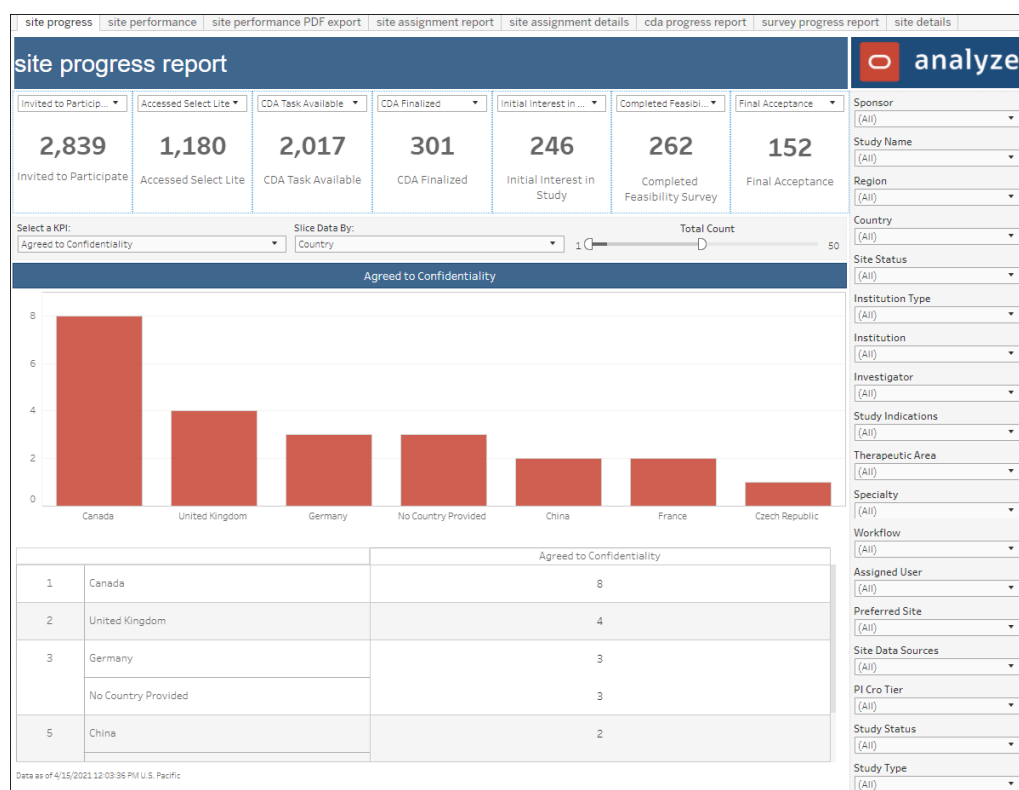
Dashboards and sheets

Site Progress KPI

This worksheet gives you control over the summary Key Performance Indicators (KPIs) and/or bucket state data you prefer to view. You can dynamically control which of the KPIs/ bucket states display in the worksheet, and you can choose up to seven to display in the worksheet's upper section.

- Invited to Participate
- Accessed Select LITE
- CDA Task Available
- CDA Final Review
- CDA Finalized
- Agreed to Confidentiality
- Initial Interest in Study
- Final Interest in Study
- Completed Feasibility Survey
- Final Acceptance
- N/A
- Bucket – Back up
- Bucket – Declined
- Bucket – Do not invite
- Bucket – Final acceptance
- Bucket – Final decline
- Bucket – Invited
- Bucket – Master list
- Bucket – Nominated
- Bucket – Not interested
- Bucket – On hold
- Bucket – Selected
- Bucket – Short list

You can also specify the KPI/bucket state in the lower section of the worksheet. To further refine the view, use the “Slice Data By” filter in the lower section to slice by study, region, or country. Adjust the position of the “Total Count” slide to control the displayed range from lowest to highest value.



Site Performance

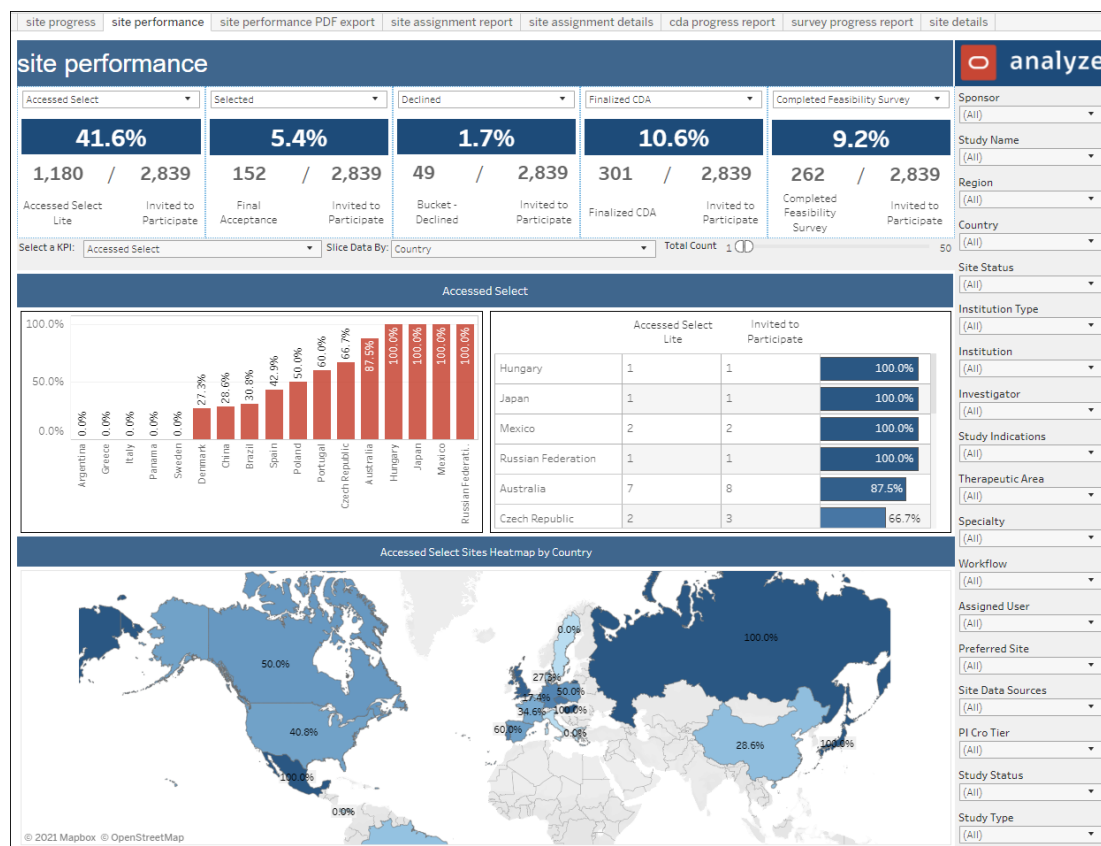
The Site Performance dashboard allows you to easily compare performance metrics across studies and sites, and you can slice data as needed. At the top of the dashboard, selected metrics display as a percentage. Metric calculations are:

- **Accessed Select** – number of sites that accessed Oracle Site Select LITE divided by the number of sites invited to participate
- **Selected** – number of sites selected divided by the number of sites invited to participate
- **Declined** – number of sites who declined to be in the study divided by the number of sites invited to participate
- **Finalized CDA** – number of sites that have completed the CDA divided by the number of sites invited to participate
- **Completed Feasibility Survey** – number of sites that have completed a survey divided by the number of sites invited to participate

The center section of the Site Performance dashboard shows a breakdown of a selected KPI with a bar chart to the left and a table to the right. Slice the data as you prefer – by Assigned user, Study, Region, or Country. You can also adjust the data using the Total Count slider. When you click into a table cell, a tool tip displays a link to “View Site Details.” If clicked, the Site Details worksheet displays with the site information that made up that table cell’s metric.

The dashboard's lower section is a geographical heat map that reflects countries for which KPI data exist. The map reflects the KPI selected in the center section of the dashboard, and the map displays percentage results in gradient blue (lighter blue, lower percentage through darker blue, higher percentage). When a country has no site data, the map reflects the country in light gray. Click a country to drill to the Site Details worksheet to view site information that made up that country metric.

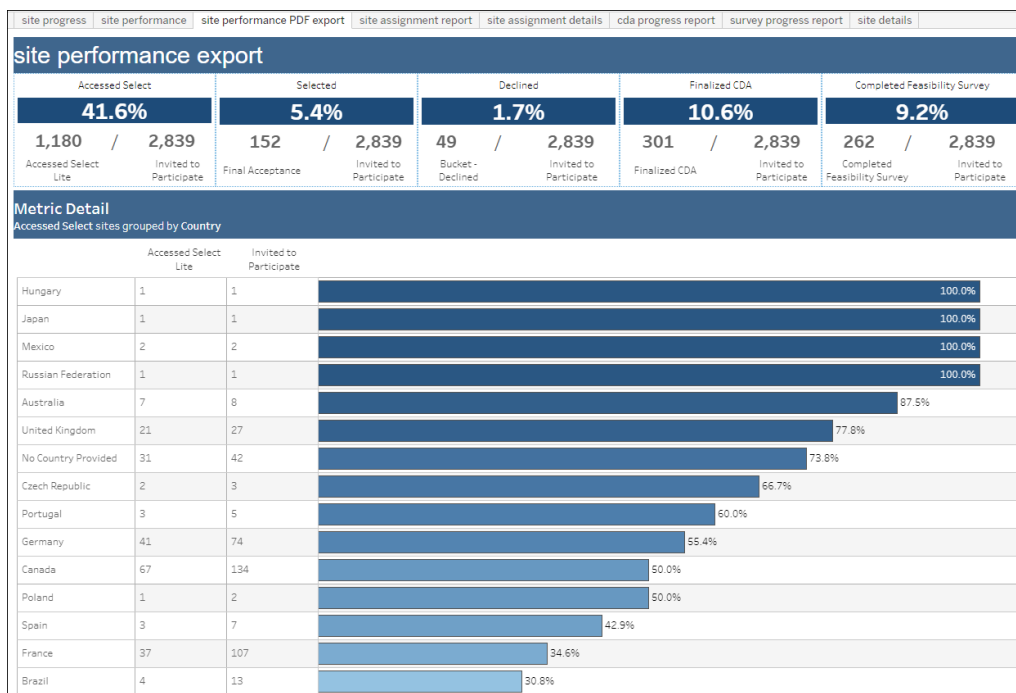
As with all Oracle Site Analyze reports, the Site Performance dashboard's right panel provides a broad range of filters to subset the data.



Site Performance export worksheet

The Site Performance PDF Export worksheet provides a convenient way to export filtered information from the Site Performance Dashboard to a format suitable to share with sponsors.

The export sheet reflects currently selected options and filters from the Site Performance Dashboard, and any adjustments to the dashboard's parameters automatically update the export PDF. By design, the export worksheet does not include a filter panel or other editable parameters (e.g., KPI selectors, Slice data by selectors, etc.).

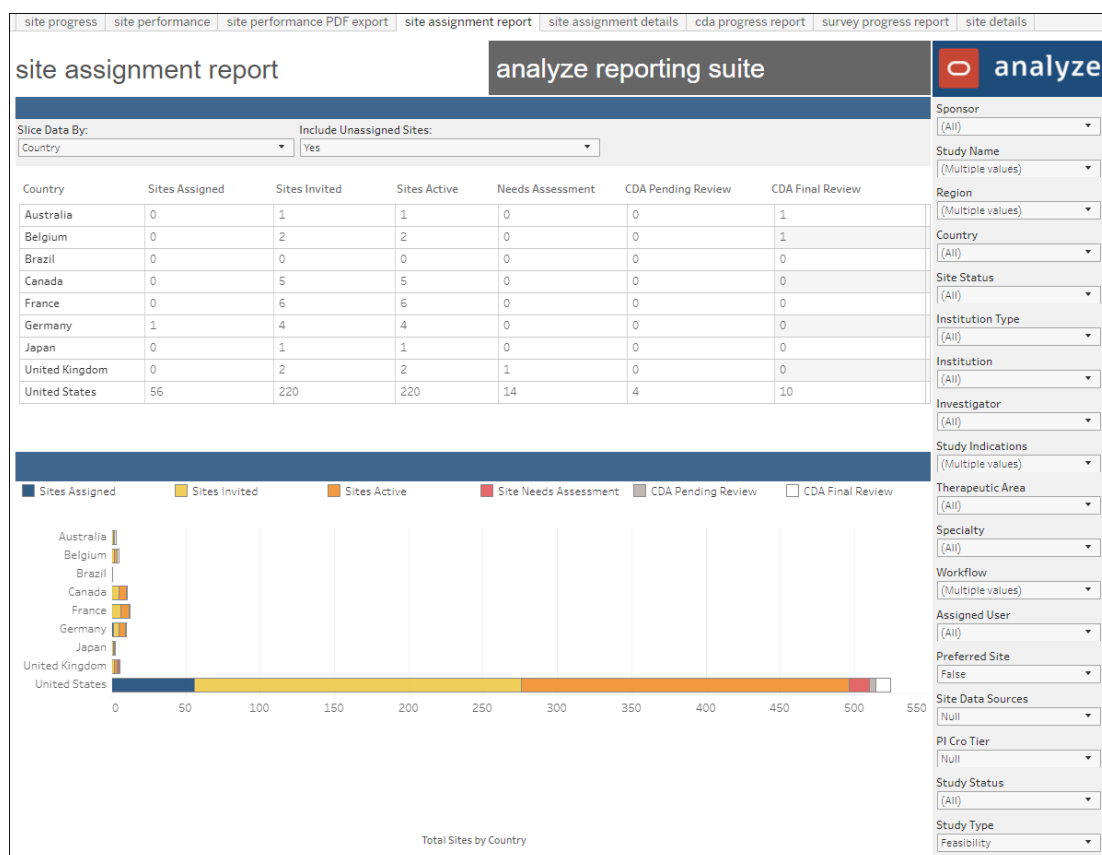


Site Assignment Report

The Site Assignment Report provides a simple way to gain insight into action items and workflow statuses across all the sites to which Oracle Site Select users are assigned. The report includes tabular data for details like:

- Study
- Sites Assigned = Number of sites assigned
- Site Invited = Number of sites invited
- Sites Active = Number of sites active (invited but not in a dropped bucket state)
- Needs Assessment = Number of sites with all tasks complete and still in the invited bucket
- CDA Pending Review = Number of CDA uploaded pending review
- CDA Final Review = CDA uploaded final review

The Site Assignment Report also includes a stacked bar chart where you can slice the above data by region, country, study, and assigned users. You can drill to site details, as preferred, from either the tabular data or the bar chart data.



Site Assignment Details

The Site Assignment Details worksheet allows you to filter and export site assignment detail to a CSV format file.

site progress | site performance | site performance PDF export | site assignment report | **site assignment details** | cda progress report | survey progress report | site details

site assignment details

analyze reporting suite

Intended for export to CSV purposes only

Reset Drilldown Filter Site Assignment Metric: Sites Assigned Slice Data By: Country Include Unassigned Sites: Yes

Showing "Sites Assigned" data grouped by country. These are sites that currently have a user assigned to them.

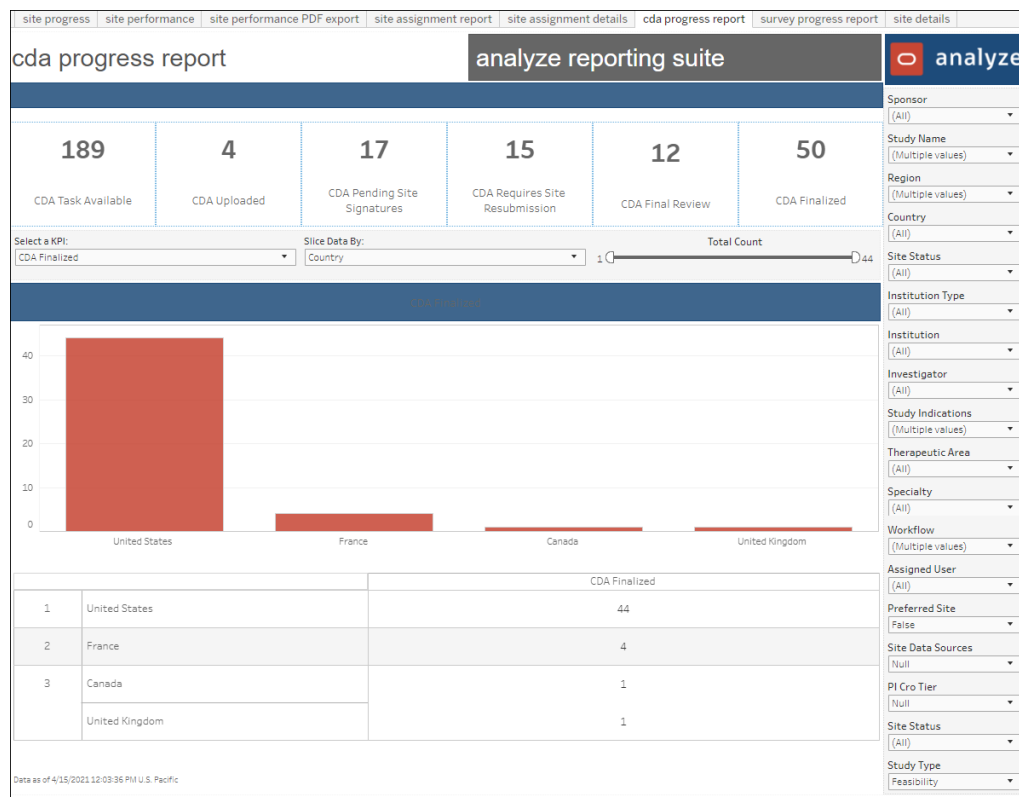
Data Slice Value	Assigned User	Investigator	Country	Institution	Institution Type	Survey Resubmitted	Site Status	CDA Status	Survey Status	PI Phone Number	PI Emails	Specialty
Germany	pr	A	Germany	Yale Univer.	Null	No	Invited	Download..	Not Start..	Null	s	Null
United States	Ar	P	United Sta.	Allergy Ass.	Null	No	Declined	Download..	Not Start..	Null	pr	Pulmonary Disease
	gl	L. A	United Sta.	Pediatric Al.	Null	No	Invited	N/A	Submitted	Null	as	Null
	M	B	United Sta.	University	Null	No	Final acce..	Download..	N/A	Null	st	Null
	M	H	United Sta.	West Penn	Null	No	Final acce..	Download..	N/A	Null	hv	Pulmonary Disease
	C	V	United Sta.	University	Null	No	Invited	Download..	Not Start..	Null	m	Pulmonary Disease
	M	A	United Sta.	Cooper Uni.	Null	No	Invited	Download..	Not Start..	Null	W	Null
	M	A	United Sta.	Department	Null	No	Invited	Download..	Not Start..	Null	m	Null
	A		United Sta.	University	Null	No	Invited	Download..	Not Start..	Null	as	Null
	B	S	United States	Brigham and Women's Hospital	Null	Yes	Invited	Download..	Not Started	Null	pi	Gastroenterology
											st	Gastroenterology
												Pulmonary Disease
	H	I	United Sta.	University	Null	No	Invited	Download..	Not Start..	Null	m	Null
	M	A	United Sta.	ABC Hospital	Hospital	No	Declined	N/A	N/A	Null	as	Null
	S	A	United Sta.	Marquette	Null	No	Invited	Download..	Not Start..	Null	as	Null
	B	t.	United Sta.	St Elizabeth	Null	Yes	Final acce..	Download..	Resubmitt.	Null	ti	Null
	B		United States	Mayo Clinic	Null	Yes	Invited	Download..	Resubmitt.	Null	bi	Null
	B										pr	Null

Right sidebar filters: Sponsor (All), Study Name (Multiple values), Region (All), Country (All), Site Status (All), Institution Type (All), Institution (All), Investigator (All), Study Indications (Multiple values), Therapeutic Area (Null), Specialty (All), Workflow (Multiple values), Assigned User (All), Preferred Site (False), Site Data Sources (Null), PI Cro Tier (Null), Study Status (All), Study Type (Feasibility)

CDA Progress Report

CDA progress metrics represented on this worksheet are:

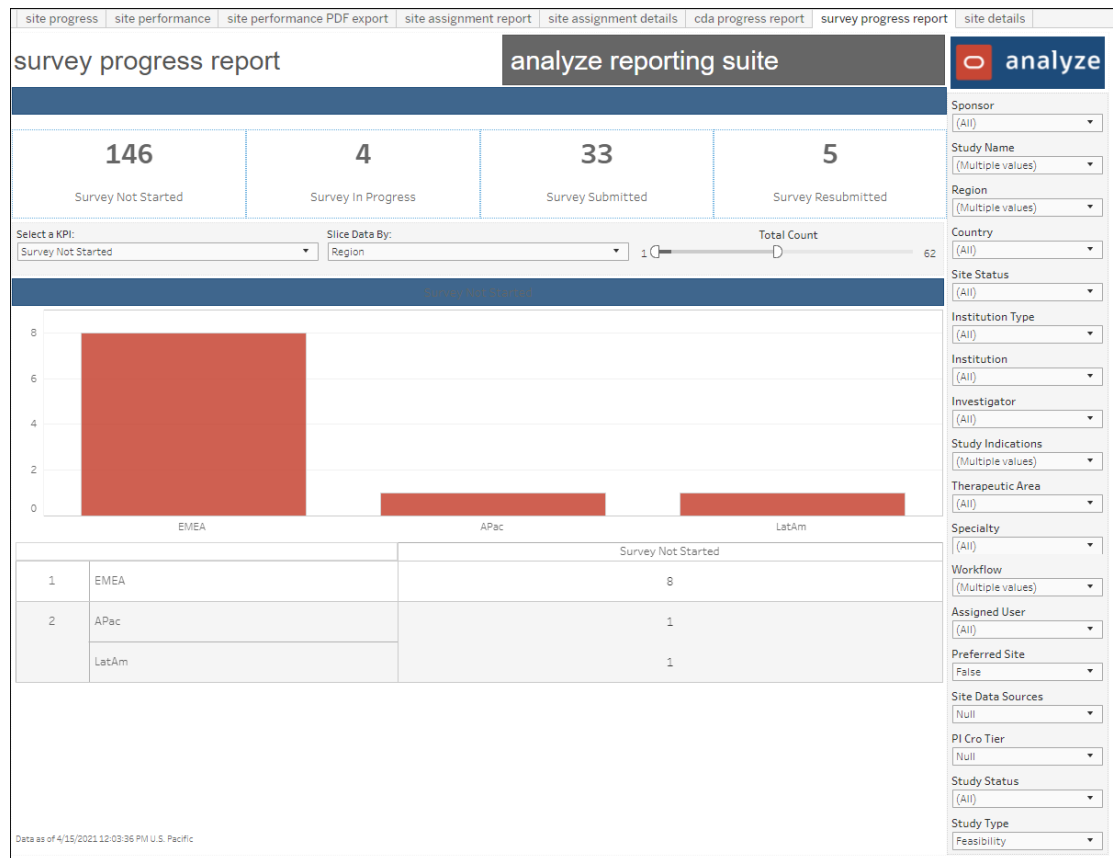
- CDA Task Available
- CDA Uploaded
- CDA Pending Site Signatures
- CDA Requires Site Resubmission
- CDA Final Review
- CDA Finalized



Survey Progress Report

This worksheet has the same user interface as the Site Progress KPI and CDA Progress worksheets. Survey progress metrics represented on this worksheet are:

- Not started (when the site has reached the feasibility survey workflow task)
- In Progress
- Submitted
- Resubmitted



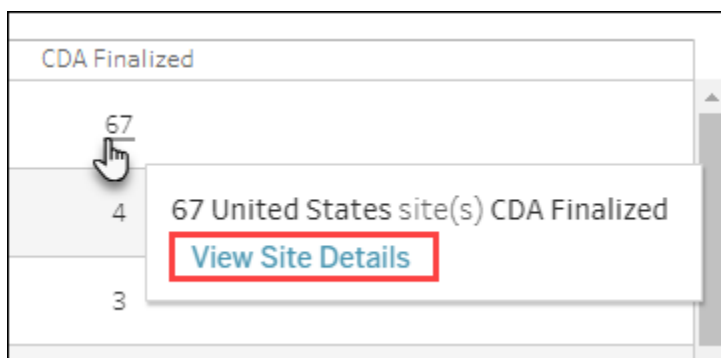
Site Details

This worksheet, which is intended for export to CSV, includes the following data for sites:

- Study Name
- Investigator
- Country
- Institution
- Institution type
- Survey Resubmitted
- Site Status
- CDA Status
- Survey Status
- PI Phone Number
- Email
- Specialty

site progress site performance site performance PDF export site assignment report site assignment details cda progress report survey progress report site details											
site details											
Intended for export to CSV purposes only											
Study Name	Investigator	Country	Institution	Institution Type	Survey Resubmitted	Site Status	CDA Status	Survey Status	PI Phone Number	PI Emails	Specialty
Happyness study	At	United States	ABC Hospital	Hospital	No	Declined	N/A	N/A	Null	a	Null
	At	United States	Johns Hopkins University	Hospital	No	Final acceptance	Downloaded	N/A	410.502.7384	h	Null
	At	United States	Cooper University Hospital	Null	No	Invited	Downloaded	Not Started	Null	v	Null
	At	United States	New York Presbyterian H.	Null	No	Invited	Downloaded	Not Started	Null	d	Null
	At	United States	Department of Veterans ..	Null	No	Final acceptance	Downloaded	N/A	Null	ti	Pulmonary Disease
	At	United States	University of California, S.	Null	No	Selected	N/A	N/A	Null	a	Null
	At	United States	Washington University in ..	Null	No	Back up	N/A	Not Started	Null	ti	Null
	At	United States	University of Iowa	Null	No	Final acceptance	Downloaded	Submitted	Null	ti	Pulmonary Disease
	At	United States	Department of Veterans ..	Null	No	Final decline	N/A	N/A	Null	ri	Null
	At	United States	University of California, Irvine	Null	No	Final acceptance	Downloaded	Submitted	Null	a	Null
											Null
	At	United States	Baylor University	Null	No	Invited	Downloaded	Not Started	Null	ts	Null
	At	United States	Blue Lions House	Null	No	Invited	N/A	Not Started	Null	A	Null
	At	United States	Centers for Disease Contr.	Null	No	Declined	Downloaded	N/A	Null	le	Null
	At	United States	McMaster University	Null	No	Invited	Downloaded	Not Started	Null	e	Null
											Null
	At	United States	University of California, D.	Null	No	Invited	Downloaded	Not Started	Null	ts	Null
	At	United States	Children's Hospital of Pitt.	Null	No	Invited	Downloaded	Not Started	Null	jk	Pulmonary Disease
	At	United States	Oracle University	Null	No	Final decline	Downloaded	Submitted	Null	ti	Cardiothoracic Surger
											Null
											Null
At	United States	Department of Veterans ..	Null	No	Invited	Downloaded	Not Started	Null	ri	Null	
At	United States	Bay Area Chest Physicians	Null	No	Invited	Downloaded	Not Started	Null	a	Null	
At	Germany	University Of Göttingen	Null	No	Back up	Downloaded	Not Started	Null	ti	stings ..	
At	Germany	Yale University	Null	No	Invited	Downloaded	Not Started	Null	ti	Null	
Study Type											
Feasibility											
Study Status											
(All)											
Sponsor											
(All)											
Study Name											
(Multiple values)											
Region											
(Multiple values)											
Country											
(All)											
Site Status											
(All)											
Institution Type											
(All)											
Institution											
(All)											
Investigator											
(All)											
Study Indications											
(Multiple values)											
Therapeutic Area											
(All)											
Specialty											
(All)											
Workflow											
(Multiple values)											
Preferred Site											
False											
Assigned User											
(All)											

When you hover over a top KPI or a number in the country table in the Site Progress Report, CDA Progress Report, or Survey Progress Report worksheet, a tooltip displays with a “View Site Details” link. When you click this link, the Site Details worksheet (above) displays details for the sites that make up that specific number.



Site Study Interest and Exclusion

Workbook synopsis

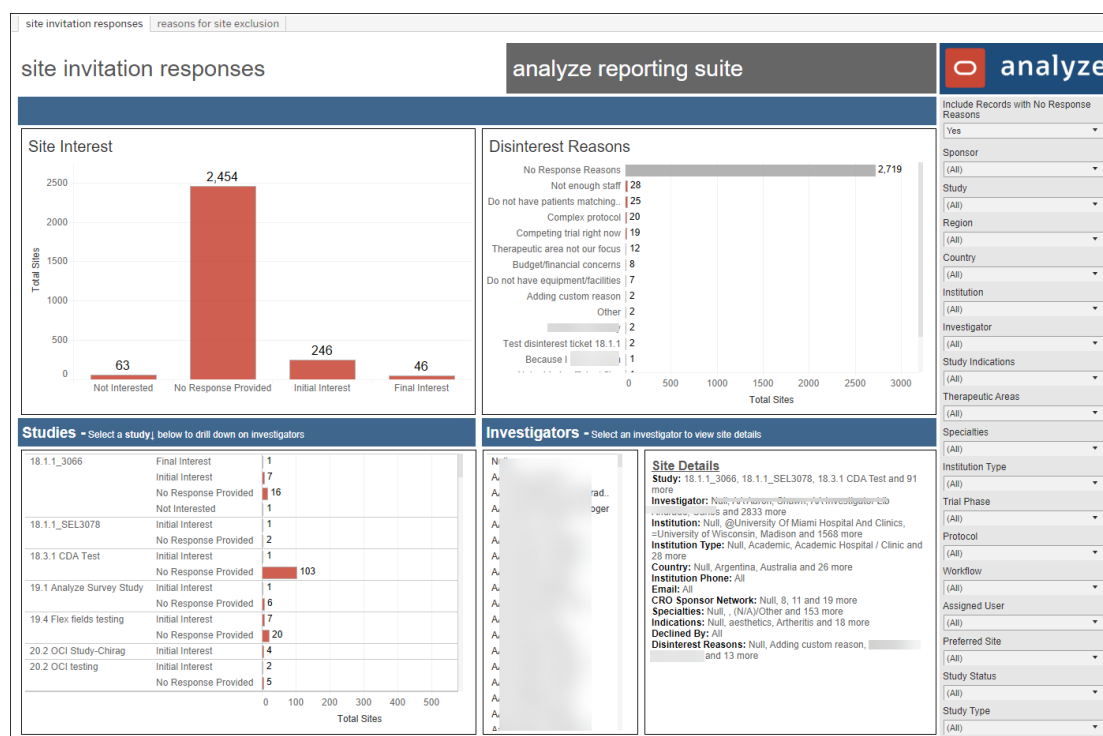
The Oracle Site Analyze Site Study Interest and Exclusion report, intended for Oracle Site Select customers, provides dashboard reports that visualize site invitation response state and reasons for site exclusion or study disinterest.

Dashboards and sheets

Site Invitation Responses

This dashboard provides you with details about invitation response metrics and site disinterest reasons. Interest bar graphs allow you to quickly see the distribution of site invitations by status (e.g., No response, Not interested, Initial Interest, and Final Interest). The dashboard also provides a bar graph to visualize the number of site disinterest reason instances (e.g., Competing trial, Complex protocol, etc.).

You can adjust a wide range of filters to refine the dashboard to a preferred data view. In the lower portion of the dashboard, you can also drill to investigators and site details.



Reasons for Site Exclusion

This dashboard provides site exclusion data in a similar format to the site invitation responses dashboard. Exclusion bar graphs allow you to quickly see the distribution of excluded sites by bucket status (e.g., Declined, Do Not Invite, Final Decline, and Not Interested). The dashboard also provides a bar graph to visualize the number of reason instances (e.g., Not enough personnel, Regulatory history, Does not have adequate facilities, etc.).

You can adjust a wide range of filters to refine the dashboard to a preferred data view. In the lower portion of the dashboard, you can also drill to investigators and site details.



Site User Engagement

Workbook synopsis

The Site User Engagement dashboard is designed to help you understand site interactions within Oracle Site Select. The dashboard allows you to view and analyze all site communications sent via email or through the Oracle Site Select site communications portal.

Dashboards and sheets

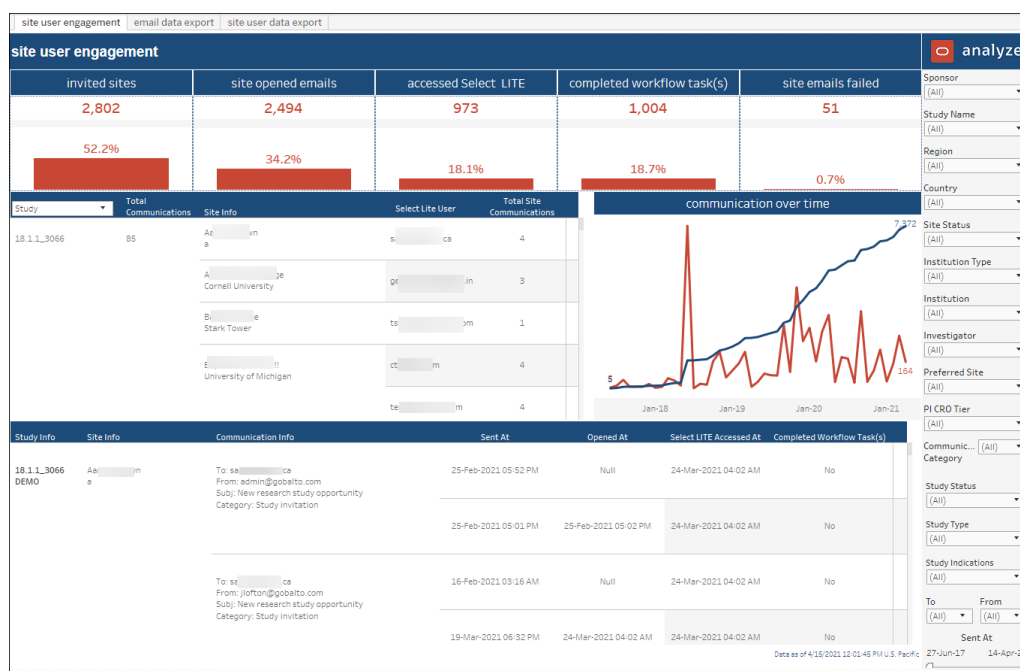
Site User Engagement

The Site User Engagement dashboard allows you to view the following key performance indicators of site engagement in Oracle Site Select:

- invited sites – total invited sites
- opened emails – total emails opened by site users
- accessed Oracle Site Select LITE – total times a user clicked on the Oracle Site Select LITE link in an email
- completed workflow tasks – total times a user clicked on the Oracle Site Select LITE link in an email and completed a workflow task
- site emails failed – total emails sent that failed

The dashboard also contains a table that shows a summary of all communications by study site, as well as a trend graph that displays the number of site communications and emails per month along with a cumulative total in Oracle Site Select over time. The drop-down list control at the upper left of the center grid allows you to filter the data to Study, Country, or Oracle Site Select LITE user. Click on the numbers in the middle table to filter the bottom table and view the details of each site communication. Click one of the KPIs at the top of the report (e.g., invited sites, site opened emails, etc.) to control the data displayed in the middle and lower section of the report.

Like all Oracle Site Analyze reports, this dashboard provides multiple filtering options in the right filter panel. You can subset the reported data to your preference using filters for Sponsor, Protocol Number, Study, Email Category, Email Sent Date, and more.



Email Data Export

The Email Data export worksheet allows you to export site data grouped by site user email. This export helps you identify instances when the same email account is used for multiple users. In this export, you'll also see variances in recorded user names, and you can use that data to reconcile user profile information across sites (e.g., identify the CTC across three sites who has variances in name such as missing middle name, suffix, etc.).

site user engagement		email data export		site user data export																															
for data export purposes only																						Sponsor		Study Indications											
		[Add]		[Add]																															
PI First Name		PI Last Name		Institution		Site Status		Workflow		To		From		Subject		Communication		Sent At		Opened At		Select LITE Accessed At		Completed Workflow Task(s)		Email Bounce		Study Name		Study Type		Study Status		Region	
Chapman		Adm		Cooper University Hospital		Null		Invited		Test CDA		SC		PI		You have been...		New site pro...		20-Nov-2020 07:19 PM		Null		30-Nov-2020 04:34 AM		Yes		No		Ni		[Multiple] [Add]		[Add]	
Pharm, Wny		Protocol		Adm		m										New study invitation		Study invitation		30-Nov-2020 04:31 AM		Null		30-Nov-2020 04:34 AM		Yes		No		Ni		[Add]		[Add]	
Pharm, Wny		Protocol		Adm		m										New study invitation		Study invitation		02-Apr-2020 05:31 AM		02-Apr-2020 05:33 AM		30-Nov-2020 04:34 AM		Yes		No		Ni		[Add]		[Add]	
Pharm, Wny		Protocol		Adm		m										New study invitation		Study invitation		29-May-2020 12:19 AM		Null		30-Nov-2020 04:34 AM		Yes		No		Ni		[Add]		[Add]	
Pharm, Wny		Protocol		Adm		m										New study invitation		Study invitation		30-Nov-2020 04:30 AM		30-Nov-2020 04:35 AM		30-Nov-2020 04:34 AM		Yes		No		Ni		[Add]		[Add]	
Pharm, Wny		Protocol		Adm		m										New site pro...		New Select...		30-Nov-2020 04:29 AM		Null		30-Nov-2020 04:34 AM		Yes		No		Ni		[Add]		[Add]	
Pharm, Wny		Protocol		Adm		m										Request to...		Request Sele...		30-Nov-2020 04:35 AM		Null		30-Nov-2020 04:34 AM		Yes		No		Ni		[Add]		[Add]	
Pharm, Wny		Protocol		Adm		m										Your Oracle...		Locked Sele...		30-Nov-2020 04:32 AM		Null		30-Nov-2020 04:34 AM		Yes		No		Ni		[Add]		[Add]	
Pharm, Wny		Protocol		Adm		m										New study invitation		Study invitation		18-Feb-2021 10:58 PM		Null		30-Nov-2020 04:34 AM		Yes		No		Ni		[Add]		[Add]	
Pharm, Wny		Protocol		Adm		m										New study invitation		Study invitation		18-Feb-2021 11:01 PM		Null		30-Nov-2020 04:34 AM		Yes		No		Ni		[Add]		[Add]	
Pharm, Wny		Protocol		Adm		m										New study invitation		Study invitation		18-Feb-2021 11:01 PM		Null		30-Nov-2020 04:34 AM		Yes		No		Ni		[Add]		[Add]	
Pharm, Wny		Protocol		Adm		m										New study invitation		Study invitation		12-Dec-2019 07:47 PM		Null		30-Nov-2020 04:34 AM		Yes		No		Ni		[Add]		[Add]	
Pharm, Wny		Protocol		Adm		m										New study invitation		Study invitation		29-Jan-2020 09:37 PM		Null		30-Nov-2020 04:34 AM		Yes		No		Ni		[Add]		[Add]	
Pharm, Wny		Protocol		Adm		m										New site pro...		New site pro...		02-Apr-2020 05:30 AM		Null		30-Nov-2020 04:34 AM		Yes		No		Ni		[Add]		[Add]	
Pharm, Wny		Protocol		Adm		m										New site pro...		New site pro...		30-Jan-2020 06:24 PM		Null		30-Nov-2020 04:34 AM		Yes		No		Ni		[Add]		[Add]	
Pharm, Wny		Protocol		Adm		m										New study invitation		Study invitation		29-May-2020 12:12 AM		Null		12-Dec-2019 07:42 PM		No		No		Ni		[Add]		[Add]	
Pharm, Wny		Protocol		Adm		m										New study invitation		Study invitation		29-Jun-2020 12:59 PM		Null		12-Dec-2019 07:42 PM		No		No		Ni		[Add]		[Add]	
Pharm, Wny		Protocol		Adm		m										New study invitation		Study invitation		12-Dec-2019 07:37 PM		Null		12-Dec-2019 07:42 PM		No		No		Ni		[Add]		[Add]	
Pharm, Wny		Protocol		Adm		m										New study invitation		Study invitation		12-Dec-2019 07:44 PM		Null		12-Dec-2019 07:42 PM		No		No		Ni		[Add]		[Add]	
Pharm, Wny		Protocol		Adm		m										New study invitation		Study invitation		12-Dec-2019 07:59 PM		Null		12-Dec-2019 07:42 PM		No		No		Ni		[Add]		[Add]	
Pharm, Wny		Protocol		Adm		m										New study invitation		Study invitation		29-May-2020 12:19 AM		Null		12-Dec-2019 07:42 PM		No		No		Ni		[Add]		[Add]	
Pharm, Wny		Protocol		Adm		m										New study invitation		Study invitation		29-Jun-2020 12:59 PM		Null		12-Dec-2019 07:42 PM		No		No		Ni		[Add]		[Add]	
Pharm, Wny		Protocol		Adm		m										New email st...		New email st...		08-Mar-2019 12:47 AM		08-Mar-2019 11:12 AM		08-Mar-2019 10:53 AM		No		No		Ni		[Add]		[Add]	

Site User Data Export

This worksheet, which we designed specifically for export, provides detailed email communications information. The worksheet provides multiple filters, in the panel to the right, that allow you to adjust content prior to download.

site user engagement email data export site user data export													Sponsor	Study Indications	
for data export purposes only													(All)	(All)	
Site User Email	Study Name	Sponsor	Protocol No.	PI First Name	PI Last Name	Institution	Institution Type	Site Status	Select LITE Accessed At	Completed Workflow Task(s)	Email Bounc.	Email Dropp.	Study Name	Study Status	
Null	Crazyness Study	Skyline Pharma	Why Protocol2	G	B	Hunter College	Null	Declined	Null	No	No	No	Study Name (Multiple vs.)	(All)	
				N	A	Johns Hopkins University	Null	Final acceptance	Null	Yes	No	No			
				N	A	Tufts Medical Center	Null	Invited	Null	No	No	No	Region	Study Type	
				T	A	Department of Veterans Affairs	Null	Final acceptance	08-Mar-2019 01:25 PM	Yes	No	No	(All)	Feasibility	
		Happyness study	Sponsor XYZ	DEMO	A	S	State University Of New York	Null	Not interested	13-Jun-2018 01:07 AM	Yes	No	No	Country	Communication Category
				A	B	Michigan State University	Null	Invited	Null	No	No	No	(All)	(All)	
				D	A	Bay Area Chest Physicians	Null	Invited	25-Jan-2020 01:54 AM	No	Null	Null			
											No	No	Site Status	To	
													(All)	(All)	
													Institution Type	From	
f...	Crazyness Study	Skyline Pharma	Why Protocol2	A	B	Null	Null	Invited	Null	No	No	No	(All)	(All)	
													Institution	Email Failed	
													(All)	(All)	
													Investigator	Sent At	
													(All)	27-Jun-17 14-Apr-21	
													Preferred Site		
													No		
													PI/CRO Tier		
													Null		

13

Survey Response Analysis

Workbook synopsis

The Oracle Site Analyze Survey Response Analysis workbook, intended for Oracle Site Select customers, provides a detailed dashboard of feasibility survey response data as well as two worksheets designed for data export to CSV.

Dashboards and sheets

Survey Analysis dashboard

The Survey Analysis dashboard provides summary response information for feasibility surveys including: total surveys submitted, survey scores, tiers, and analysis on individual responses to questions. You can drill down into specific studies, surveys, and various other dimensions and export relevant data as needed.

Use the filter options panel, to the right, to limit the scope (e.g., choose a specific study, Therapeutic area, Site status, etc.) and tailor the available data to your preferred view.

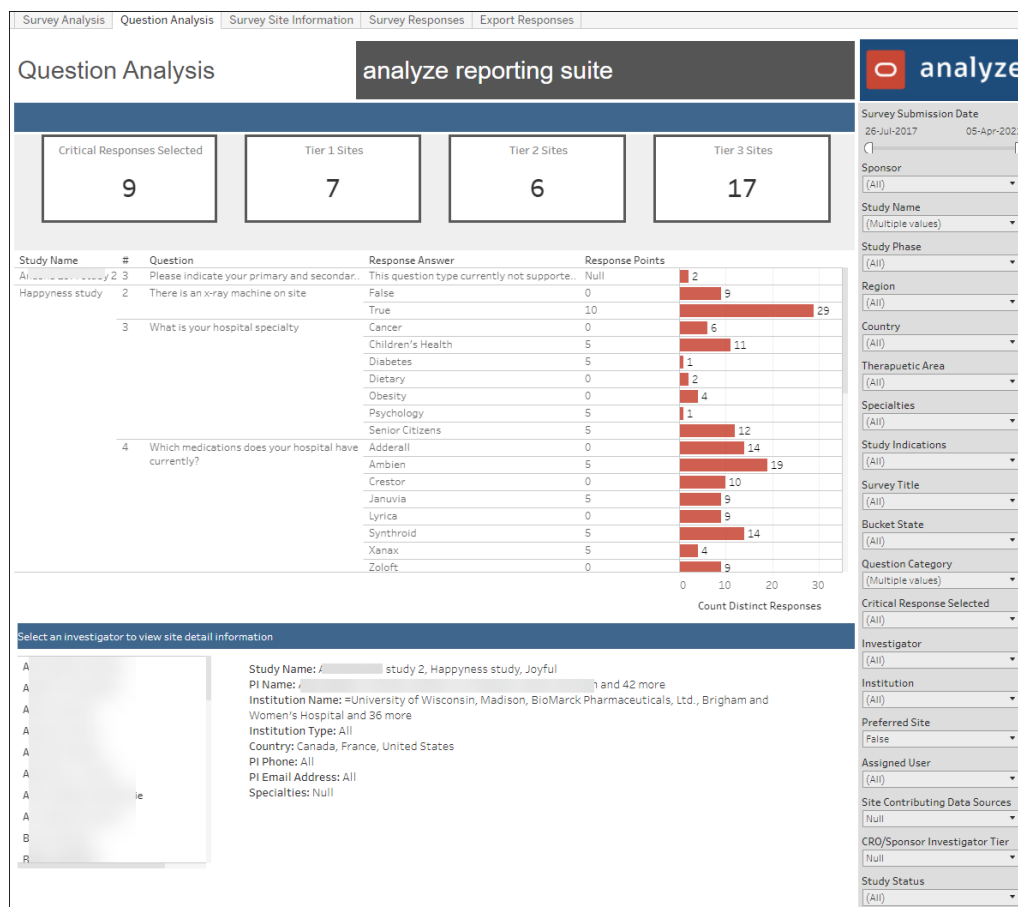


Question Analysis dashboard

The Question Analysis dashboard view allows report users to easily filter down to those sites that selected a specific response to a specific feasibility survey question for site survey analysis. The dashboard has three components:

1. A bar chart that shows the questions and number of responses for each question
2. A list of all PIs that made up the bar (displays when a report user clicks on a bar)
3. A list of metadata associated with the PI (displays when a report user clicks on a PI name). Metadata includes:
 - study
 - investigator
 - institution
 - institution type
 - country
 - institution phone
 - email
 - specialties

The filter options panel, to the right, allows users to limit the scope (e.g., choose a specific sponsor, study, Therapeutic area, Site status, etc.) to tailor the available data to their preferred view.



Survey Site Information export

The Survey Site Information export worksheet, which is intended for CSV download, includes detailed PI and institution data. Use the filter options to the right to tailor the available data to your preferred view before export.

Survey Analysis

Question Analysis

Survey Site Information

Survey Responses

Export Responses

Survey Site Information

analyze reporting suite

analyze

Survey Submission Date

26-Jul-2017 05-Apr-2021

Sponsor

(All)

Study Name

(Multiple values)

Study Phase

(All)

Region

(All)

Country

(All)

Therapeutic Area

(All)

Specialties

(All)

Study Indications

(All)

Survey Title

(All)

Bucket State

(All)

Question Category

(Multiple values)

Critical Response Selected

(All)

Investigator

(All)

Institution

(All)

Preferred Site

False

Assigned User

(All)

Site Contributing Data Sources

Null

CRO/Sponsor Investigator Tier

Null

Study Status

(All)

Study Type

Feasibility

Study Name	Sponsor	CRO Sponsor Network	Study Number	Study Interest	Country	Assigned User	Protocol Name	Site Disinterest Reason	Preferred Site	PI Name
Happyness study	Sponsor XYZ	Null	20	Null	France	M	r Null	Null	False	Be
					United States	M	r Null	Null	False	Bi
										Br
										Cr
										Si
										Ya
										ZL
										Bx
										M
										M
					M					
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Survey Responses worksheet

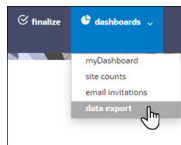
The Survey Response worksheet provides an aggregated tabular view that relates to the lower portion of the Survey Response Analysis dashboard. The worksheet's filter panel, to the right, provides many options to adjust the data to your preferred view.

Data Export Utility

The Data Export Utility for Oracle Site Select is a self-service export that allows permissioned Oracle Site Select users to design a CSV extract with specified data columns and filters. Currently, the extract includes data columns for site feasibility, survey response, notes, and study site users.

Permission required to access the utility

You must have at least one Oracle Site Select role with “Data Export Management” permission to access the export utility feature from the Oracle Site Select Dashboards menu. Please contact your super user or administrator if you do not have this permission.

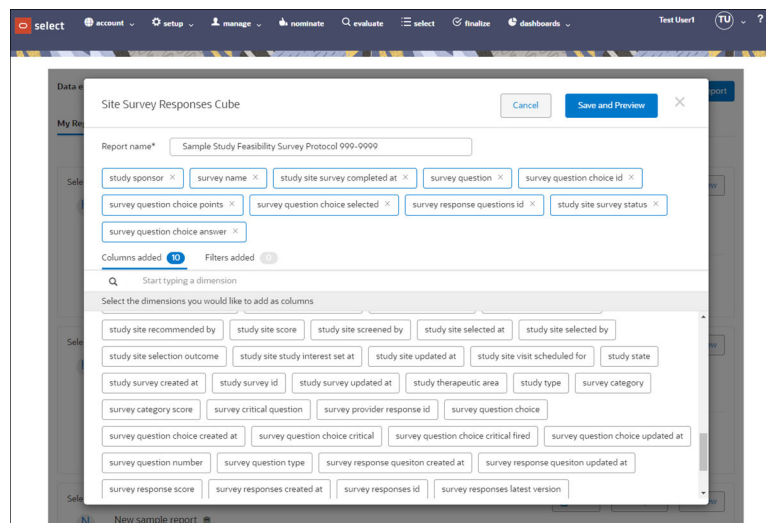


Data extract cubes

Data Extract Cubes

The Data Export Utility allows you to create new extracts based on:

- **Cube** (a multidimensional array of data) – The available data cubes are Note data, Site survey responses, Study site data, and Study-site users. You select one cube per extract.
- **Columns** (dimensions) – For example, PI Name, PI email address, Country, Study, etc. You can add columns in any order.
- **Filters** – For example, Study name, Country, etc. You can also add filters in any order and specify an operator (e.g., contains, equals, is null, etc.) for each filter.



Preview an export

Preview mode allows you to view a previously-created report. Preview mode provides pagination controls and page count to ensure acceptable response time for high-volume reports. Each page can include up to 10,000 rows, and the preview page displays the first 100 records. A "Total records" value displays to the left of the pagination controls to show you the total records returned based on the report's filters.

Suppose you click Export when in Preview mode. In that case, the Export function exports the page currently being previewed, and the prompt text, "You have exported this page of the report," displays next to the Export button to indicate the download/export of the report page has started.

Sample Study Feasibility Survey Protocol 999-9999 Total records: 3191

Study Survey Id	Survey Question Choice Id	Study Sponsor	Survey Name	Survey Question Choice Answer	Survey Question	Survey Question Choice
091ad8d6-d631-40...	0039f6b5-6573-4868-bd11-f770ae...	Test123	Regular site		Which Special Cha...	0
091ad8d6-d631-40...	034809d2-ec70-42c8-a186-698a0...	Test123	Regular site	Yes	I = #<b...	
091ad8d6-d631-40...	05cdda32-7c45-4969-b336-4808b6...	Test123	Regular site	Yes	I = #<b...	
091ad8d6-d631-40...	075aef73-b4f8-41cf-a65a-61354bd...	Test123	Regular site		I, #, \$, %, ', (,), *, +, ...	10
091ad8d6-d631-40...	0a8de1f8-ae41-4075-8330-0994f81...	Test123	Regular site	Yes	I = #<b...	
091ad8d6-d631-40...	0d832400-594c-40ca-ad02-3ct5a...	Test123	Regular site	Yes	I = #<b...	
091ad8d6-d631-40...	0f7978a2-350e-4399-9968-a31606...	Test123	Regular site	yes	I = #<b...	
091ad8d6-d631-40...	10023ef4-ee68-46a3-8477-0030f4...	Test123	Regular site	No	I = #<b...	
091ad8d6-d631-40...	1242364e-6fa0-4422-9aa4-0ca9ab...	Test123	Regular site	Yes	I = #<b...	
091ad8d6-d631-40...	15ef036b-ecd5-4e3f-8460-11dbaa8...	Test123	Regular site	No	I = #<b...	
091ad8d6-d631-40...	150aa0b3-c0cd-4590-83c4-86a7a...	Test123	Regular site	Yes	I = #<b...	
091ad8d6-d631-40...	1c02f651-af03-41f8-bb8d-2e4308b...	Test123	Regular site		Which Special Cha...	10
091ad8d6-d631-40...	1cba525e-88ed-4331-a164-3a2f24d...	Test123	Regular site	No	I = #<b...	
091ad8d6-d631-40...	1f49f886-2eb6-4fab-afcc-15a4af73...	Test123	Regular site	Yes	I = #<b...	
091ad8d6-d631-40...	20f0ab7-27d5-4102-8d04-f4bd07c...	Test123	Regular site		Which Special Cha...	0
091ad8d6-d631-40...	2292fc48-cda8-42f0-9f51-d79d5dc...	Test123	Regular site	yes	I = #<b...	

Share exports with other users

You can optionally share reports you've created with other users in your account who have permission to access the Data Export Utility. The Data export reports page includes two tabs:

1. **My Reports:** lists all reports you created
2. **Shared Reports:** lists all reports shared with all Data Export Utility users in the account

Data export reports

My Reports Shared Reports

Select - Study Site Data Cube

H Happiness site report Shared

Column: agree to confidentiality on, country name, bucket, institution country, institution, pi first name, pi last name

Filter: study name=Happiness study


Select - Site Survey Responses Cube

H Happiness survey report

Column: study name, survey name, country name, pi last name, pi first name, workflow name

Provided you are the report author, you can Share (🔗) that report from the My Reports tab, or share the report while in Preview mode. When you click Share, a modal displays where you'll set the report's access type as:

- **Private (Accessible by author only)** – default selection
- **Shared (Read only to other DEU users)**

The Data Export Utility indicates a shared report () , and as report author, you can unshare your report at any time by returning to the access type modal to select "Private." You can also edit your shared reports as preferred, and other Data Export Utility users will see the updated report in their Shared Reports list.

Shared reports are read only for all users except the report author, who has full access to edit, delete, etc. When non-authors view shared reports, they do not have the option to edit or delete; however, they can Preview and Export shared reports as preferred.

- [Create a new export](#)

If you have the appropriate business role permission in Oracle Site Select, you can access the Data Export Utility to create a unique export that contains your preferred data then export the result to a .csv format file.

- [View existing export](#)

The Data export report page lists all of your previously-created reports, as well as any reports authored by others and shared with you.

- [Edit an existing export](#)

The My Reports tab on the Data export reports page lists all of your previously created reports, and you can edit any of them as you prefer.

- [Delete an export](#)

When you no longer need a report you created, you can delete it as necessary.

- [Share or unshare an export](#)

Share an export when you want others in your account to have access to an export you authored. When you no longer want others to have access, change the report's access level back to private.

Create a new export

If you have the appropriate business role permission in Oracle Site Select, you can access the Data Export Utility to create a unique export that contains your preferred data then export the result to a .csv format file.

1. From the Oracle Site Select top navigation, hover over **Dashboards** and click **Data Export**.
2. On the Data export page, click **New Report**.
3. On the New Report pop-in, choose **Site Survey Responses Cube** from the drop-down list.
4. At the top of the pop-in, enter your preferred **Report name**.
5. Under "Columns added," choose the dimensions you would like to add as columns. You can scroll through the list of available dimensions or search for a specific dimension. As you add dimensions, the "Columns added" count increases.
6. (Optional) Click "Filters added" and choose a field from the left drop-down menu. Next, choose an operator (e.g., equals, contains, etc.). Finally, enter a text value to filter by. All text values are wildcard and case sensitive. For instance, you can use the Filter option to specify a study name.
7. Click **Save and Preview**.

8. You can optionally Share the report with other users in your account. At the upper right in Preview mode, click **Share**. In the share modal, confirm selection of the Shared option, and click **Save**.
9. At the upper right in Preview mode, click **Export** to generate a CSV file, or click **Edit Report** to adjust the report data before exporting.

View existing export

The Data export report page lists all of your previously-created reports, as well as any reports authored by others and shared with you.

1. From the Oracle Site Select top navigation, hover over **Dashboards** and click **Data Export**.
2. On the Data export reports page, click the **My Reports** or **Shared Reports** tab and locate the export you want to view.
3. At the far right of the export's panel, click **Preview**.


Edit an existing export

The My Reports tab on the Data export reports page lists all of your previously created reports, and you can edit any of them as you prefer.

1. From the Oracle Site Select top navigation, hover over **Dashboards** and click **Data Export**.
2. On the Data export page, click the **My Reports** tab and locate the report to be edited.
3. To the right of the export's title, click **Edit report**.
4. Adjust the report name, columns, and/or filters as preferred.
5. Click **Save and Preview**.
6. At the upper right, click **Export** to generate a CSV file, or click **Edit report** to further refine the report before exporting.


Delete an export

When you no longer need a report you created, you can delete it as necessary.

1. From the Oracle Site Select top navigation, hover over **Dashboards** and click **Data Export**.
2. On the Data export reports page, click the **My Reports** tab and locate the export to be deleted.
3. To the right of the export's title, click delete (.
4. In the confirmation modal, click **Yes, delete report**.

Share or unshare an export

Share an export when you want others in your account to have access to an export you authored. When you no longer want others to have access, change the report's access level back to private.

1. From the Oracle Site Select top navigation, hover over Dashboards and click Data Export.
2. On the Data export reports page, click the **My Reports** tab and locate the export you want to share.
3. Click Share (.
4. In the confirmation modal, select **Shared (Read only to other DEU users)**, and click **Save**.

To unshare an export, return to the confirmation modal and select **Private (Accessible by author only)**, then **Save**.