

Oracle® Health Sciences Site Analyze Cloud Service

Using Oracle Site Analyze: For Oracle Site Select Users



Release 23.3
F93842-01
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The Oracle logo, consisting of a solid red square with the word "ORACLE" in white, uppercase, sans-serif font centered within it.

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Oracle Health Sciences Site Analyze Cloud Service Using Oracle Site Analyze: For Oracle Site Select Users, Release 23.3

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Preface

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Documentation accessibility

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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.

1

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

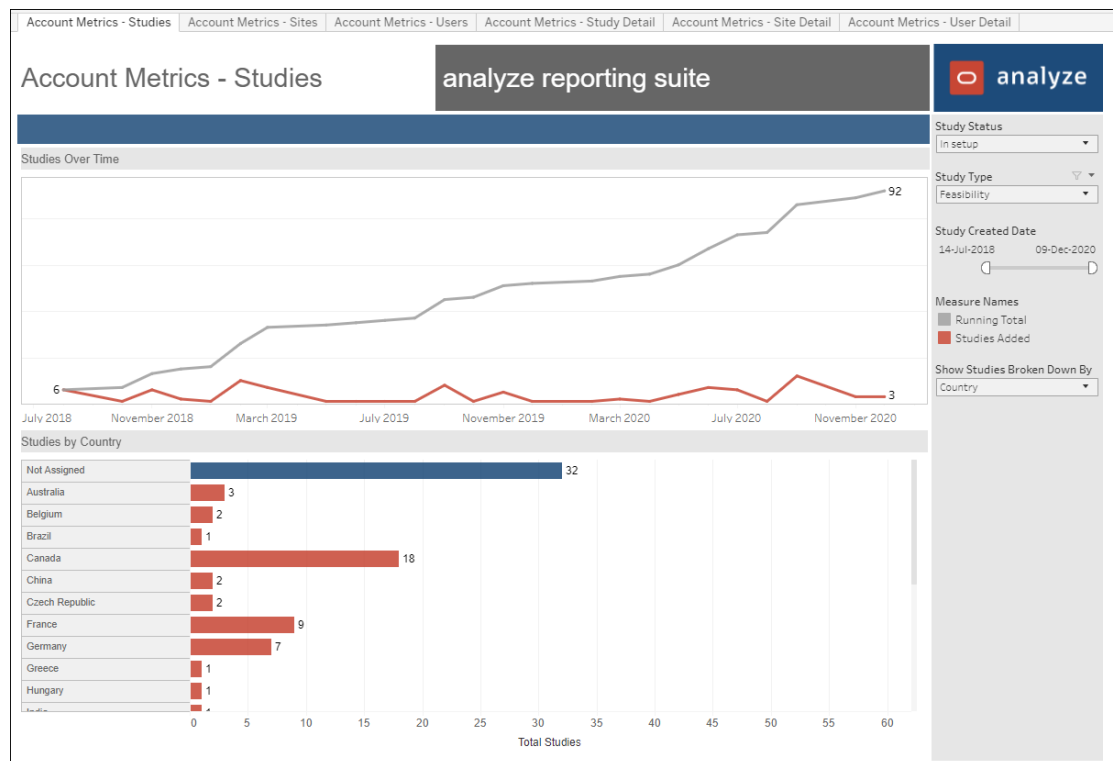
The Account Metrics report workbook, which is intended for Oracle Site Select customers, includes dashboard views of studies, sites, and Oracle Site Select users as well as detailed cross-tab sheets of each.

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

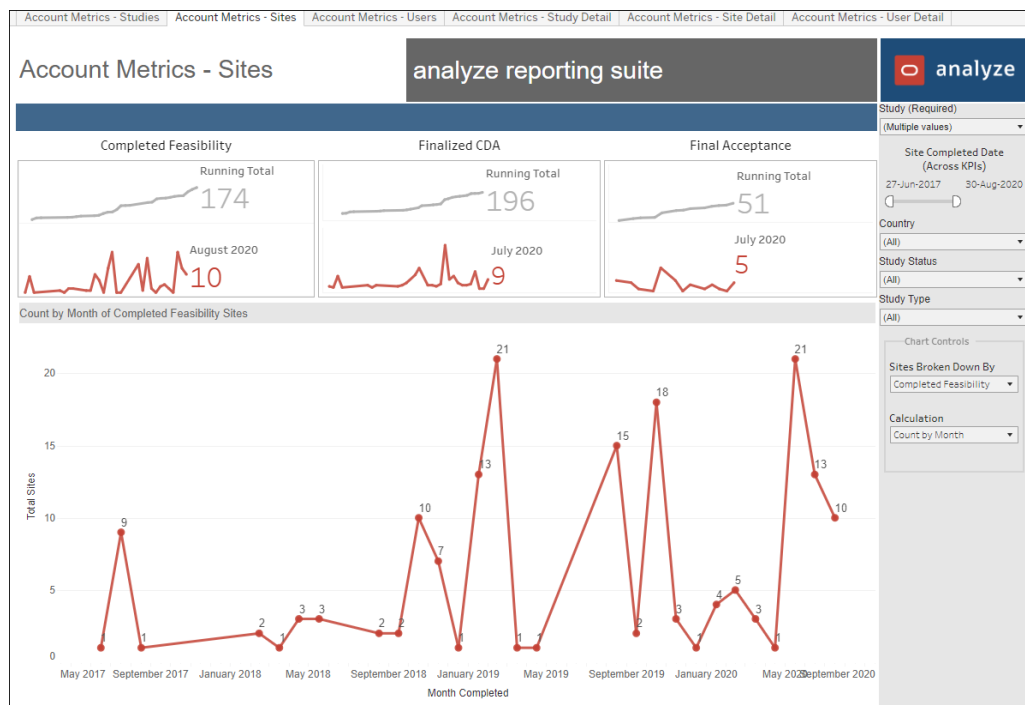
The study detail worksheet allows report users to filter details by study status, study creation date, protocol name, sponsor, study phase, and/or compound. Report users also have the ability to drill directly to site data from the hyperlinked value listed in the "Total Sites Nominated" column.

Study Name	Protocol Name	Sponsor	Study Phase	Compound	Study Created Date	Total Sites Nominated
18	DEI	Null	Phase III	Null	12-Apr-2018	90
122		Null	Phase IV	Null	05-Apr-2018	56
18	DEI	Null	Phase II	Null	02-Nov-2018	105
19	SSF	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	SSF	Skyline Pharma	2	Null	05-Jun-2020	15
78	10C		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	90S	Null	Null	Null	28-Sep-2020	0
Ac	ASf	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
AI	AIIf	Null	Phase II	Null	22-Jan-2018	457
an	24		Phase III	Null	25-Mar-2019	35
Ar	2		Phase I	Null	22-Mar-2019	85
Ar	17C	Null	Null	Null	15-Nov-2019	0
CS	XYZ	Null	Phase II	Null	08-Nov-2018	116

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.



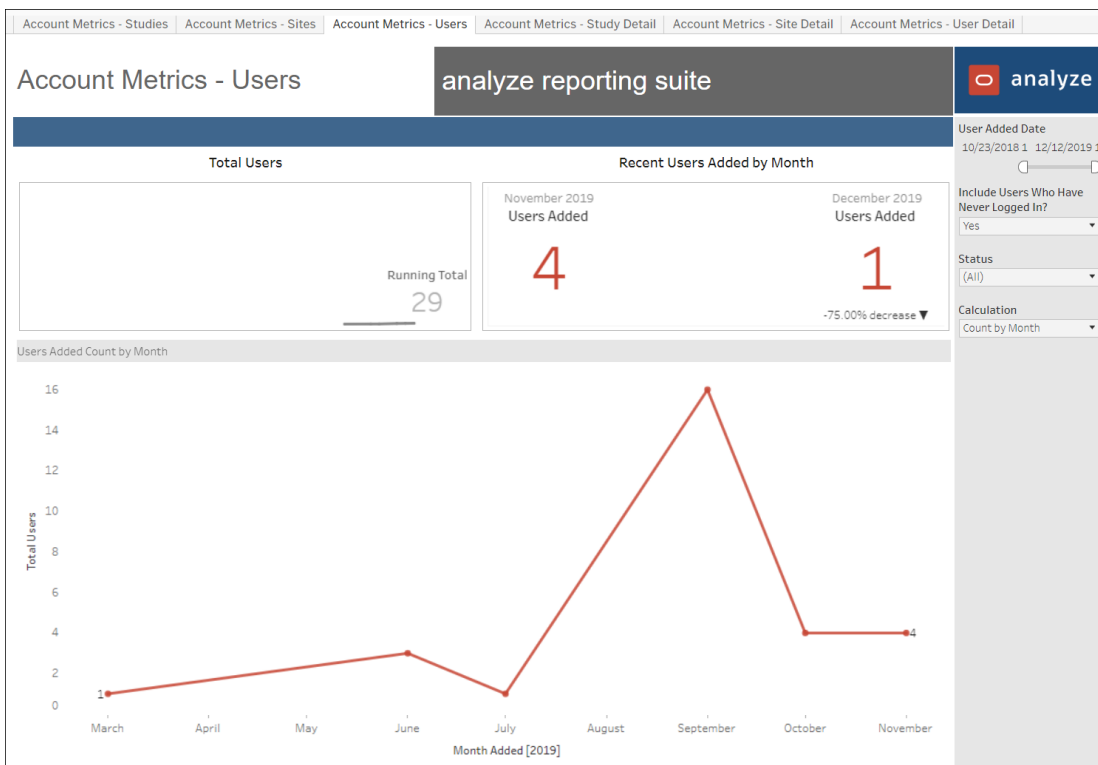
Account Metrics - Site Detail

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.).

Study Name	Protocol Name	Country	PI Last Name	PI First Name	Institution	Institution Type	Bucket State	PI Phone	Email	Specialty	Study (Required)
18.3.3 CDA Test	DEMO	United States	Bussel	James	Cornell University	Inst type	Invited	232.746.3400	mb	Respiratory Medici	(All)
			Nathan	Steven	Iowa FairFax Hospital- Iowa Transplant Centre	Community	Invited	703-776-2906	sb	Respiratory Medici	Protocol Name
			Strange	Charlie	Medical University of S.	Hospital	Invited	843.7822153	sb	Critical Care Medici	DEMO
Happyness study	DEMO	France	Bourdin	Arnaud	Oxford University	Hospital	Short list	+33 467386126	a-f	Pulmonary Disease	Study Status
			Abbey	RAJAT	ABC Hospital	Hospital	Declined	Null	ac	Pulmonary Disease	In setup
			Abermethy2	Am	Duke University	Oxford	Do not invite	466678932	aa	Null	Study Type
			Aboumatar	Hanan	Johns Hopkins Universi	Hospital	Final accept.	410.602.7384	ha	Null	Essentiality
			Abrahams	Roger	Carnegie mellon	Hospital	On hold	Null	ms	Null	Country
			Abrams	Thad	Department of Veterans	Public	Final accept.	Null	rs	Null	(Default value)
			Agarwal	Sunil	Wellson University	Oxford	Invited	Null	bu	Null	Bucket State
			Alden	Carter	Johns Hopkins Universi	Fashion	Invited	Null	sa	Null	(All)
			Aryal	Shambhu	University of Kentucky	Primary	Invited	Null	sa	Null	Institution Type
			Bajaj	Saona	Cornwell University	Finance	Invited	Null	sa	Null	(Default value)
			Baile	Christian	Christian University	Movies	Invited	Null	ch	Null	Institution
			Ben	Shradha	University of Maheras.	Management	Invited	8779966789	sh	Null	(All)
			Bernhet	Elizabeth	University of California	Management	Invited	Null	sa	Null	Calculation
			Bhargh	William	Johns Hopkins Universi	Hospital	Final accept.	Null	sa	Null	Count by Month
			Bologh	Istvan	University of Texas. Ga.	Hospital	Invited	Null	sb	Null	
Kapoor	Shammi	University of Madras.	Management	Short list	Null	sh	Null				
Man	Helle	Dumplings University	Food	Review	Null	he	Null				
Super	Dumplings University	Food	Nominated	Null	Null	su	Null				
Wright	Nancy	Children's Clinic	Clinic/Outpatie.	Invited	850.8777323	na	Null	Pediatrics, Pediatr			

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 - User Detail

The users detail worksheet allows report users to filter details by date range for Oracle Site Select user account creation and last login. Report users can also specify if they want to include users who have never logged in and/or view the data by active, inactive, or all users.

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

analyze reporting suite



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	Si	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
jo	Joi	Ze	27/06/2019	20/12/2019	Active
ju	Jui	Gn	10/06/2019	09/12/2019	Active
pl	Pri	Se	23/09/2019	Null	Active
pr	pri	lar	25/09/2019	Null	Active
pr	pri	sel	24/09/2019	26/12/2019	Active
pr	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
sr	Sti	Sti	25/10/2019	18/11/2019	Active
sr	Sir	Du	15/11/2019	Null	Active
sr	Sir	Du	15/11/2019	Null	Active
sr	Sir	er Du	15/11/2019	15/11/2019	Active
sr	Sir	Sir	18/10/2019	15/11/2019	Active
sr	Sir	Sd	07/11/2019	13/12/2019	Active
sr	Sri	An	17/07/2018	17/07/2018	Active

Created: 19/10/2017 - 17/12/2019

Last Login: 17/07/2018 - 26/12/2019

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

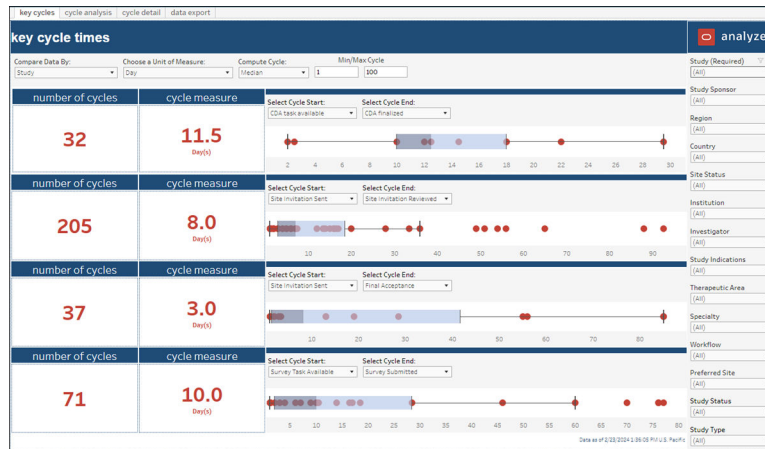
Unit of measure

- 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.

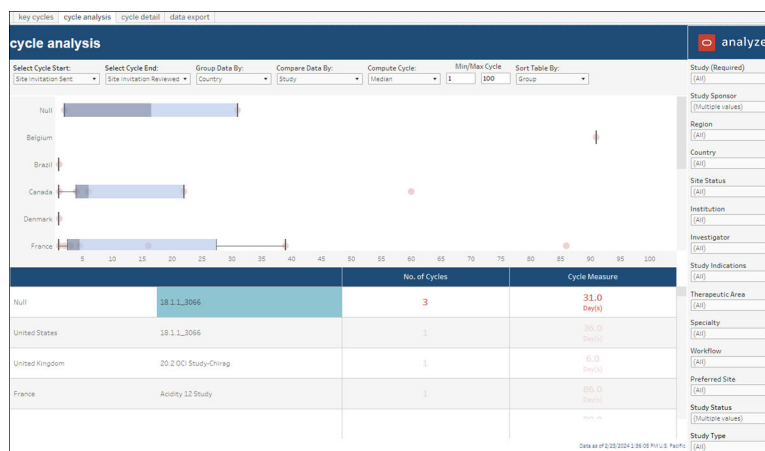


Cycle Analysis

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.

With **12** total cycle(s), the Median cycle time for CDA task available to CDA finalized for [redacted] Study is **15.0 Day(s)**

[Export Data](#)
[View Cycle Details](#)

cycle detail											analyze
Study Name	Study Sponsor	Country	Institution	Investigator	Site Status	Cycle Point	Cycle Start Date	Cycle End	Cycle End Date	Cycle Time	Study (Required)
18.L1.3066	Null	a	Brigham and Women's Hospital	[redacted]	Selected	Site Invitation Sent	16-Feb-2021	Site Invitation Reviewed	19-Mar-2021	31	Study Sponsor (Multiple values)
						Site Invitation Sent	26-Sep-2019	Site Invitation Reviewed	19-Oct-2019	19	Region (All)
						Site Invitation Reviewed	17-Sep-2019	CDA task available	29-Oct-2019	38	Country (All)
						Site Invitation Sent	25-Jun-2019	Site Invitation Reviewed	17-Sep-2019	84	Site Status (All)
						Site Invitation Reviewed	16-Sep-2019	CDA finalized	25-Oct-2019	39	Institution (All)
						CDA task available	29-Oct-2019	39	Investigator (All)		
						Site Invitation Sent	16-Sep-2019	CDA Finalized	25-Oct-2019	39	Study Indications (All)
						CDA task available	25-Oct-2019	38	Therapeutic Area (All)		
						CDA task available	25-Oct-2019	38	Specialty (All)		
						CDA task available	25-Oct-2019	38	Workflow (All)		
						CDA task available	25-Oct-2019	38	Preferred Site (All)		
						CDA task available	25-Oct-2019	38	Study Status (Multiple values)		
CDA task available	25-Oct-2019	38	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 (Required)				
Study Name	Study Sponsor	Region	Country	Institution	Investigator	Site Status	Workflow	Preferred S.	Cycle Start	Cycle End	Cycle End Date	Cycle Time	Cycle Unit	Study Sponsor	
18.L1.3066	Null	a	USA	Brigham and Women's Hospital	[redacted]	Selected	Standard	No	Site Invitation Sent	16-Feb-2021	Site Invitation Reviewed	19-Mar-2021	31	day	ABC
									Site Invitation Sent	26-Sep-2019	Site Invitation Reviewed	19-Oct-2019	19	day	ABC
									Site Invitation Reviewed	17-Sep-2019	CDA task available	29-Oct-2019	38	day	ABC
									Site Invitation Sent	25-Jun-2019	Site Invitation Reviewed	17-Sep-2019	84	day	ABC
									Site Invitation Reviewed	16-Sep-2019	CDA finalized	25-Oct-2019	39	day	ABC
									CDA task available	29-Oct-2019	39	day	ABC		
									Site Invitation Sent	16-Sep-2019	CDA Finalized	25-Oct-2019	39	day	ABC
									CDA task available	25-Oct-2019	38	day	ABC		
									CDA task available	25-Oct-2019	38	day	ABC		
									CDA task available	25-Oct-2019	38	day	ABC		
									CDA task available	25-Oct-2019	38	day	ABC		
									CDA task available	25-Oct-2019	38	day	ABC		
18.L1.303709	Null	Null	USA	Washington University of Medicine	[redacted]	Final acceptance	Standard	No	Site Invitation Sent	16-Sep-2019	Site Invitation Reviewed	24-Oct-2019	1	day	ABC
									Site Invitation Reviewed	16-Sep-2019	Final Acceptance	26-Sep-2019	1	day	ABC
									Site Invitation Sent	16-Sep-2019	Final Acceptance	26-Sep-2019	1	day	ABC
									Site Invitation Reviewed	16-Sep-2019	Final Acceptance	26-Sep-2019	1	day	ABC
									Site Invitation Sent	16-Sep-2019	Final Acceptance	26-Sep-2019	1	day	ABC
									Site Invitation Reviewed	16-Sep-2019	Final Acceptance	26-Sep-2019	1	day	ABC
									Site Invitation Sent	16-Sep-2019	Final Acceptance	26-Sep-2019	1	day	ABC
									Site Invitation Reviewed	16-Sep-2019	Final Acceptance	26-Sep-2019	1	day	ABC
									Site Invitation Sent	16-Sep-2019	Final Acceptance	26-Sep-2019	1	day	ABC
									Site Invitation Reviewed	16-Sep-2019	Final Acceptance	26-Sep-2019	1	day	ABC
									Site Invitation Sent	16-Sep-2019	Final Acceptance	26-Sep-2019	1	day	ABC
									Site Invitation Reviewed	16-Sep-2019	Final Acceptance	26-Sep-2019	1	day	ABC
18.L1.304746	Pfizer	USA	United States	University of Michigan	[redacted]	Invited	Standard	No	Site Invitation Sent	28-Sep-2012	Site Invitation Reviewed	04-May-2012	6	day	ABC
									Site Invitation Reviewed	28-Sep-2012	CDR Finalized	22-Oct-2012	19	day	ABC
									CDR task available	28-Jun-2012	Survey Submitted	24-Aug-2012	16	day	ABC
									Site Invitation Sent	28-Jun-2012	Survey Submitted	24-Aug-2012	16	day	ABC
									Site Invitation Reviewed	28-Jun-2012	Survey Submitted	24-Aug-2012	16	day	ABC
									CDR task available	28-Jun-2012	Survey Submitted	24-Aug-2012	16	day	ABC
									Site Invitation Sent	28-Jun-2012	Survey Submitted	24-Aug-2012	16	day	ABC
									Site Invitation Reviewed	28-Jun-2012	Survey Submitted	24-Aug-2012	16	day	ABC
									CDR task available	28-Jun-2012	Survey Submitted	24-Aug-2012	16	day	ABC
									Site Invitation Sent	28-Jun-2012	Survey Submitted	24-Aug-2012	16	day	ABC
									Site Invitation Reviewed	28-Jun-2012	Survey Submitted	24-Aug-2012	16	day	ABC
									CDR task available	28-Jun-2012	Survey Submitted	24-Aug-2012	16	day	ABC
18.L1.304746	Pfizer	USA	United States	University of Michigan	[redacted]	Invited	Standard	No	Site Invitation Sent	28-Sep-2012	Site Invitation Reviewed	04-May-2012	6	day	ABC
									Site Invitation Reviewed	28-Sep-2012	CDR Finalized	22-Oct-2012	19	day	ABC
									CDR task available	28-Jun-2012	Survey Submitted	24-Aug-2012	16	day	ABC
									Site Invitation Sent	28-Jun-2012	Survey Submitted	24-Aug-2012	16	day	ABC
									Site Invitation Reviewed	28-Jun-2012	Survey Submitted	24-Aug-2012	16	day	ABC
									CDR task available	28-Jun-2012	Survey Submitted	24-Aug-2012	16	day	ABC
									Site Invitation Sent	28-Jun-2012	Survey Submitted	24-Aug-2012	16	day	ABC
									Site Invitation Reviewed	28-Jun-2012	Survey Submitted	24-Aug-2012	16	day	ABC
									CDR task available	28-Jun-2012	Survey Submitted	24-Aug-2012	16	day	ABC
									Site Invitation Sent	28-Jun-2012	Survey Submitted	24-Aug-2012	16	day	ABC
									Site Invitation Reviewed	28-Jun-2012	Survey Submitted	24-Aug-2012	16	day	ABC
									CDR task available	28-Jun-2012	Survey Submitted	24-Aug-2012	16	day	ABC
18.L1.304746	Pfizer	USA	United States	University of Michigan	[redacted]	Invited	Standard	No	Site Invitation Sent	28-Sep-2012	Site Invitation Reviewed	04-May-2012	6	day	ABC
									Site Invitation Reviewed	28-Sep-2012	CDR Finalized	22-Oct-2012	19	day	ABC
									CDR task available	28-Jun-2012	Survey Submitted	24-Aug-2012	16	day	ABC
									Site Invitation Sent	28-Jun-2012	Survey Submitted	24-Aug-2012	16	day	ABC
									Site Invitation Reviewed	28-Jun-2012	Survey Submitted	24-Aug-2012	16	day	ABC
									CDR task available	28-Jun-2012	Survey Submitted	24-Aug-2012	16	day	ABC
									Site Invitation Sent	28-Jun-2012	Survey Submitted	24-Aug-2012	16	day	ABC
									Site Invitation Reviewed	28-Jun-2012	Survey Submitted	24-Aug-2012	16	day	ABC
									CDR task available	28-Jun-2012	Survey Submitted	24-Aug-2012	16	day	ABC
									Site Invitation Sent	28-Jun-2012	Survey Submitted	24-Aug-2012	16	day	ABC
									Site Invitation Reviewed	28-Jun-2012	Survey Submitted	24-Aug-2012	16	day	ABC
									CDR task available	28-Jun-2012	Survey Submitted	24-Aug-2012	16	day	ABC

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

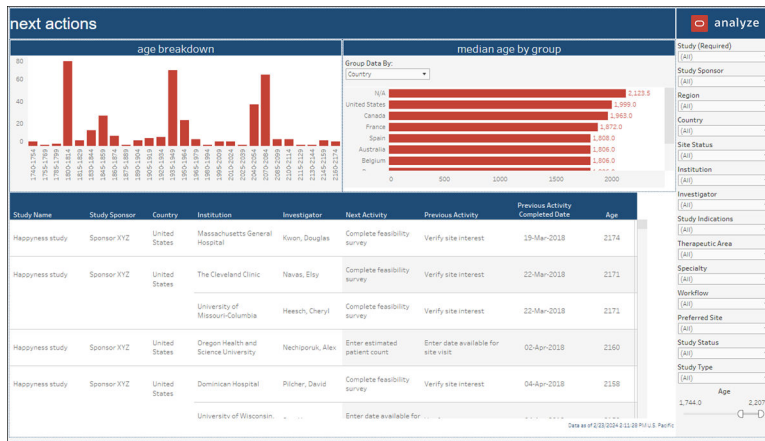
The top of the Next Actions dashboard includes two bar charts. The left chart, Age Breakdown, shows the number of available tasks by number of days the tasks have been available. The chart to the right, Median Age by Group, shows median activity age, and you can adjust this chart to show median by:

- – 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.

The screenshot displays the Oracle Notes Report interface. At the top, there are search filters: "Enter up to 5 search terms, separated by a comma (e.g. COA, site delay)", "Search Type" (And), "Search Target" (Notes), "Case Sensitive" (No), and "Study (Required)" (Multiple values). Below the search filters is a table with columns: Study Name, Bucket, Bucket State, PI Name, Institution, Country Name, Context, Created By, and Created At. The table contains several rows of data, including notes for "AS_SELECT_02", "AS_SELECT_05", and "AS_SELECT_14". To the right of the table is a vertical sidebar with various filter options: Date Range of Note (27-Jun-2017 to 28-Sep-2023), Note Type (All), Sponsor (All), Bucket (All), Bucket State (All), Study Phase (All), Region (All), Country Name (All), Context (All), Therapeutic Area (All), Specialties (All), Study Indications (All), Assigned User (All), Created By (All), Investigator (All), Institution (All), Preferred Site (All), Study Status (All), and Study Type (All).

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	
	Final acceptance	Cor	son	University of Pennsylvania	United States	CD4 Submission Co	ipson	07-Feb-2023 09:14:18 AM	Am
						Fully executed CDA	Ar	07-Feb-2023 09:17:33 AM	good Done
	finalize								
AS_SELECT_07		Den	son	University of Pittsburgh	United States	Select-Declined Ar	Ar	02-Mar-2023 12:29:39 AM	Not enough trial experience
	Final decline								
			son	Children's Hospital of Philadelphia	United States	Select-Declined Ar	Ar	02-Mar-2023 12:29:39 AM	Poor historical data management
	select	Selected	Rat	Memorial Hospital For Cancer And Allied Diseases	United States	CD4 Submission Rc	zer	01-Mar-2023 10:27:38 PM	*
						Fully executed CDA	Ar	01-Mar-2023 10:29:07 PM	*
AS_SELECT_08	Final acceptance		Ala	University of California, San Diego	United States	CD4 Submission Al	Al	14-Feb-2023 09:07:28 PM	I am done from my end
						Fully executed CDA	Ar	14-Feb-2023 09:09:18 PM	good
AS_SELECT_14	Final acceptance		Mic	Johns Hopkins University	United States	CD4 Submission M	ori	27-Feb-2023 01:14:41 AM	I am done *
	Null	Null	Null	Null	United States	Study note	Ar	07-Mar-2023 03:06:44 AM	This is a note to end contract

Study (Required) [All] Therapeutic Area [All]

Data Range of Note [27-Jun-2017 - 29-Sep-2023] [All]

Note Type [All]

Sponsor [All]

Bucket [All]

Bucket State [All]

Study Phase [All]

Region [All]

Country Name [All]

Context [All]

Study Indications [All]

Assigned User [All]

Created By [All]

Investigator [All]

Institution [All]

Preferred Site [All]

Study Status [All]

Study Type [All]

7

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

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

Total Users	Total Roles	Total Permissions
113 (110 selected)	41 (39 enabled)	31 (29 enabled)

Users

User	Count
ar	24
ar	2
at	1
at	0
at	0
bc	1
cb	16
di	4
di	3
di	2
Total Roles	41

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	Enabled
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

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
David	da	CDA Approver	CDA/Document Management	Review and Approve All CDA/D	Review and approve all CDA/document submissions.	Active	Enabled	
		Data exporter	Reporting	Data Export Management	Self service tabular data export tool with configurable columns.	Active	Enabled	
		Nomination with short list	Site Selection	Add sites to the short list durin	Add sites to the short list during Evaluation	Active	Enabled	
		Send Design CDA	CDA/Document Management	Send CDAs for digital signature	Users are able to assign signers and send a CDA for digital sign.	Active	Enabled	

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 - 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

User	Team	Count
ap	Anr	1
es	Anr	2
de	Bg. Der	1
ek	Bet	16
jlo	Joh	17
jo	Joc	19
ju	Jus	16
mi	Mic	19
mu	Mic	17
m	Mic	3
mu	Mic	17
pli	pra	17
pr	pra	17
qa	QA	3
sir	Sta	2

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 ID	Access Status
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

Grid Filters

- Filter Disabled Permissi...: Yes
- Permission Name: (All)

Generate Export

Export Teams and Collaboration

Full Name	Email	Team Name	Team Description	Study Name	Permission Group	Permission Name	Permission Description	User Active	Permission Enabled
Be...	ekulshresh@uslibo	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 goBalto Select into goBalto Activate.	Active	Enabled
					Site Selection	Site Selection Approval	Approve sites for invitation to participate, and for activation.	Active	Enabled
						Add sites to the short list dur...	Add sites to the short list during Evaluation.	Active	Enabled
						Review and Approve Assigned...	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 Configur...	Configure Select Site workflow and upload documents on behal...	Active	Enabled
						Edit Site Profiles	Upload study protocols, set study parameters, milestones and	Active	Enabled
					Survey Management	Feasibility Survey Management	Configure feasibility surveys and survey scoring for study.	Active	Enabled
						CDA/Document Management	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 goBalto Select into goBalto Activate.	Active	Enabled

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.

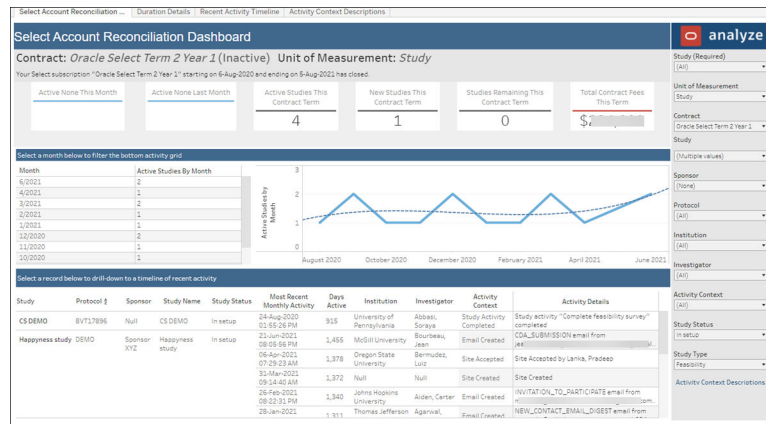
The bottom table includes the following study metadata columns:

- 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.

Study	Total Studies	Study Created On	First Activity Date	Latest Activity Date	Total Days Active
WillStudyDemo	1	9/10/2020 9:37:11 AM	9/10/2020 11:51:53 AM	9/10/2020 2:20:17 PM	0
CS DEMO	1	2/21/2018 4:03:41 AM	5/7/2018 4:28:11 PM	8/24/2020 1:55:26 PM	915
Joyful	1	3/25/2019 5:30:42 AM	3/25/2019 9:00:09 AM	3/7/2023 8:24:50 PM	1,443
Happyness study	1	6/27/2017 11:29:05 AM	6/27/2017 11:39:25 AM	8/14/2023 4:22:51 PM	2,239

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	
Study	Protocol	Sponsor	Study Name	Study Status	Activity Date	F	Days Active	Institution	Investigator	Activity Context	Activity Details	Study (Required) (Multiple values)
CS DEMO	BVT17896	Null	CS DEMO	In setup	24-Aug-2020		915	University of Pennsylvania	Abbas, Soraya	Study Activity Completed	Study activity "Complete feasibility survey" completed.	Activity Date Range 27-Jun-2017 08-Jan-2024
					01-Sep-20 PM					Survey Completed by Site	Survey Completed by Site	Sponsor (All)
					26-Jun-2020		854	University of Pennsylvania	Abbas, Soraya	Email Created	INVITATION_TO_PARTICIPATE email from Site	Institution (All)
					25-Jun-2020		854	University of Pennsylvania	Abbas, Soraya	Site Moved to Short List	Site Moved to Short List	Activity Context (All)
					01-Aug-2019		75	University of Pennsylvania	Abbas, Soraya	Site Created	Site Created	Investigator (All)
Happyness study	DEMO	Sponsor XYZ	Happyness study	In setup	14-Aug-2023		2,239	New York University	Branski, Ryan	Email Created	CDA_APPROVAL email from quinn@branski@umillupm to ryan.branski	Protocol (All)
					04-22-51 PM					Email Created	CDA Approved	Study Status In setup
					24-Aug-2023		2,239	New York University	Branski, Ryan	Email Created	Signed CDA example.pdf updated.	Study Type Feasibility
					04-23-53 PM					Study Activity Completed	Study activity "Sign and return CDA" completed	
					14-Aug-2023		2,239	New York University	Branski, Ryan	Email Created	CDA_SUBMISSION email from	
04-23-54 PM												

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

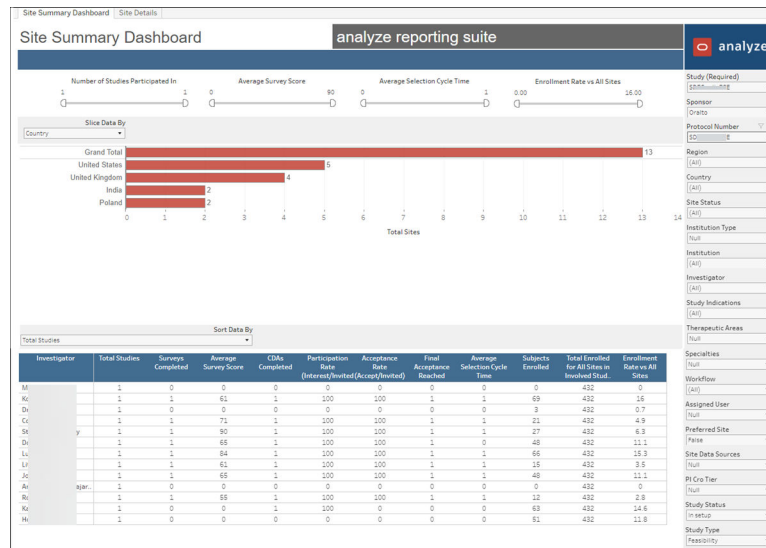
Report users can adjust the filters to a preferred view and the bar chart can be filtered by Country, Study Name, and Therapeutic Area. The number of sites included in the selected filter criteria displays at the dashboard's upper left.

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

Sort Data By Total Studies

Investigator	Therapeutic Areas	Protocol Number	Trial Phase	Country	Institution	Selection Cycle Time	Subjects Enrolled per Site	Survey Score
Mh	Null	SDECardioERE	Null	India	Hospital of Delhi	Null	0	Null
Ka	Null	SDECardioERE	Null	United Kingdom	London Hospital	1	69	183
Dh	Null	SDECardioERE	Null	Poland	Warsaw General	1	9	Null
Ca	Null	SDECardioERE	Null	United Kingdom	Leeds City Hospital	1	21	213
St	Null	SDECardioERE	Null	United States	Northeast Clinic	1	27	270
Dm	Null	SDECardioERE	Null	United Kingdom	Bristol Infirmary	0	48	195
Lah	Null	SDECardioERE	Null	United States	Community Clinic	1	66	192
Lm	Null	SDECardioERE	Null	United States	Boston General	1	15	183
Jop	Null	SDECardioERE	Null	United States	University Hospital	1	48	195
Am	Null	SDECardioERE	Null	India	Chennai Clinic	Null	0	Null
Rm	Null	SDECardioERE	Null	United States	MA Medical Center	1	12	165
Ka	Null	SDECardioERE	Null	Poland	Krakow University	Null	63	Null
Hm	Null	SDECardioERE	Null	United Kingdom	Reading General	Null	51	Null

Study (Required)

Sponsor

Protocol Number

Region

Country

Site Status

Institution Type

Institution

Investigator

Study Indications

Therapeutic Areas

Specialties

Workflow

Assigned User

Preferred Site

Site Data Sources

PI Coa Tier

Study Status

Study Type

ORACLE

9-3

10

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.

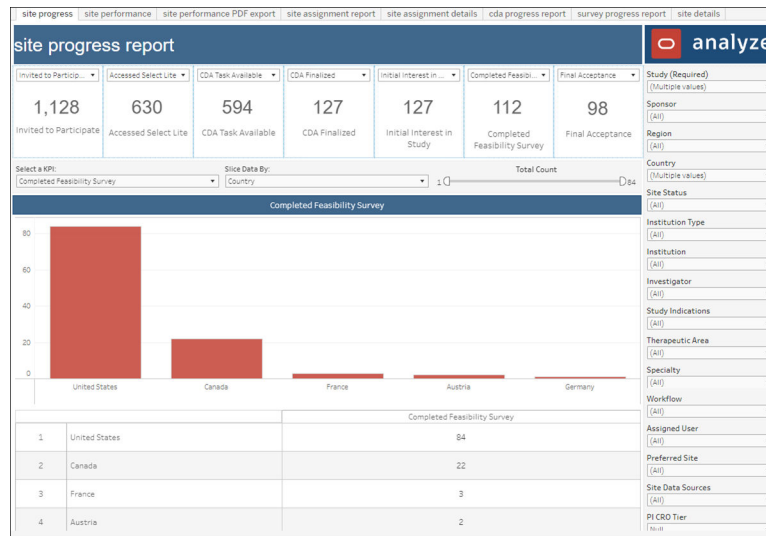
Dashboards and sheets

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

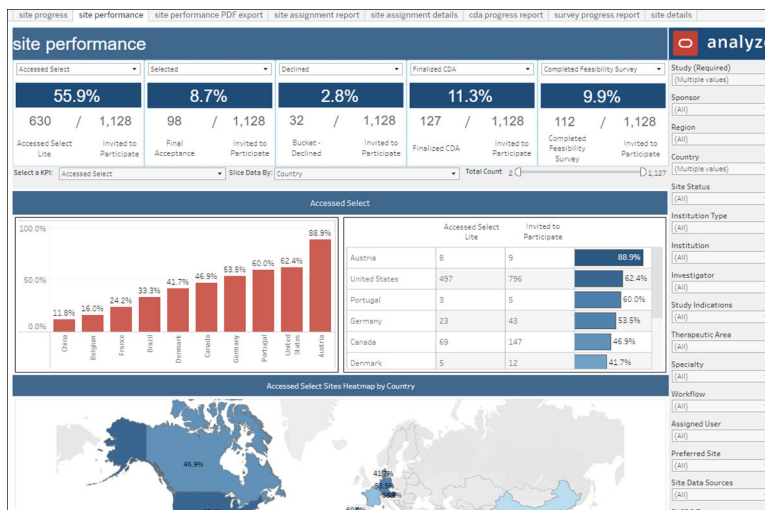
The Site Performance dashboard allows you to easily compare performance metrics across studies and sites, and you can slice data as needed. At the top of the dashboard, selected metrics display as a percentage. Metric calculations are:

- **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.

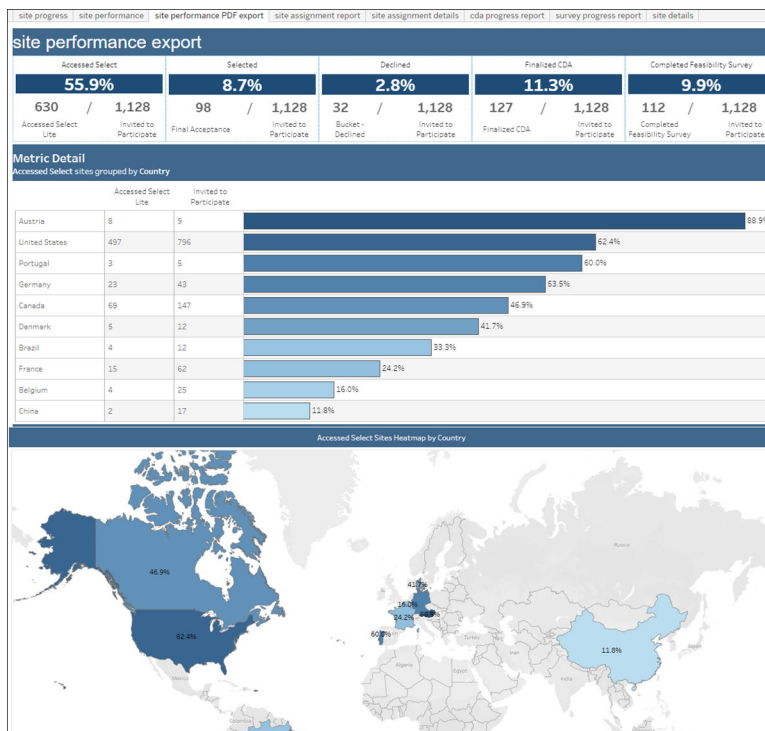
As with all Oracle Site Analyze reports, the Site Performance dashboard's right panel provides a broad range of filters to subset the data.



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.).

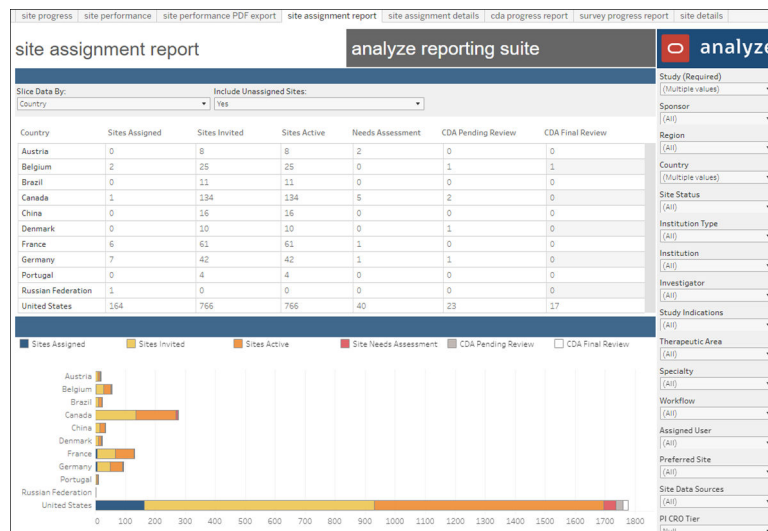


Site Assignment Report

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

analyze reporting suite **analyze**

intended for export to CSV purposes only

Reset On/Off 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.

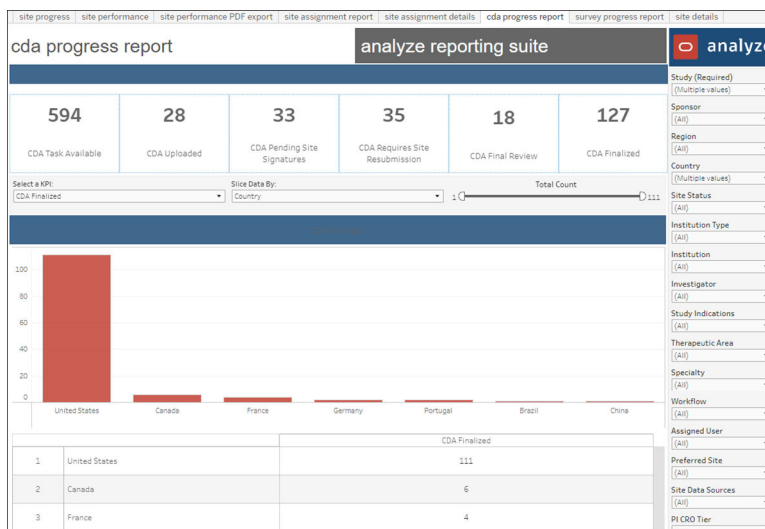
Data Slice Value	Assigned User	Investigator	Country	Institution	Institution Type	Survey Resubmitted	Site Status	CDA Status	Survey Status	PI Phone Number	PI Emails	Specialty
Belgium	Joseph	Jesse Hospi.	Belgium	Universitair	Null	No	Invited	Download	Not Start.	00	j.jesse	Null
Canada	Guillaume	Shawn	Canada	The Ottawa	Null	No	Selected	Download	Not Start.	613-737-8899	bc2@gp	Pulmonary Disease
France	Amel	Delphine	France	bruno Univ.	Null	No	Invited	Download	N/A	Null	bram	Null
	Michelle	Eric	France	Null	Null	No	Invited	Download	N/A	Null	cc	Pulmonary Disease
	Melissa	Bertrand	France	University	Null	No	Invited	Download	N/A	Null	ds	Null
	Priscilla	Caroline	France	Hospices C.	Null	No	Back-up	Download	Not Start.	Null	je	Pulmonary Disease
	Priscilla	Michelle	France	Assistance	Null	No	Invited	Download	Not Start.	Null	m	Null
	Priscilla	Caroline	France	Intergroupe Francophone de Cancerol.	Null	No	Back-up	Download	Not Started	Null	cc	Anesthesiology
												Pulmonary Disease
Germany	Melissa	BBB	Germany	University	Null	No	Invited	N/A	N/A	4.96E+11	h	Pulmonary Disease
		Elis	Germany	University	Null	No	Invited	N/A	N/A	-864380	es	Pulmonary Disease
	Priscilla	Alan	Germany	Yale Univer.	Null	No	Invited	Download	Not Start.	Null	s	Null
		Alan	Germany	Null	Null	No	Do not inv.	N/A	N/A	Null	si	Pulmonary Disease
		Bal	Germany	Null	Null	No	Do not inv.	N/A	N/A	Null	rc	Null
	Rachel	Alan	Germany	Yale Univer.	Null	No	Invited	Download	Not Start.	Null	s	Null

Study (Required) [Multiple values] | Sponsor [All] | Region [All] | Country [All] | Site Status [All] | Institution Type [All] | Institution [All] | Investigator [All] | Study Indications [All] | Therapeutic Area [All] | Specialty [All] | Workflow [All] | Assigned User [All] | Preferred Site [All] | Site Data Sources [All] | PI CRO Tier [All]

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

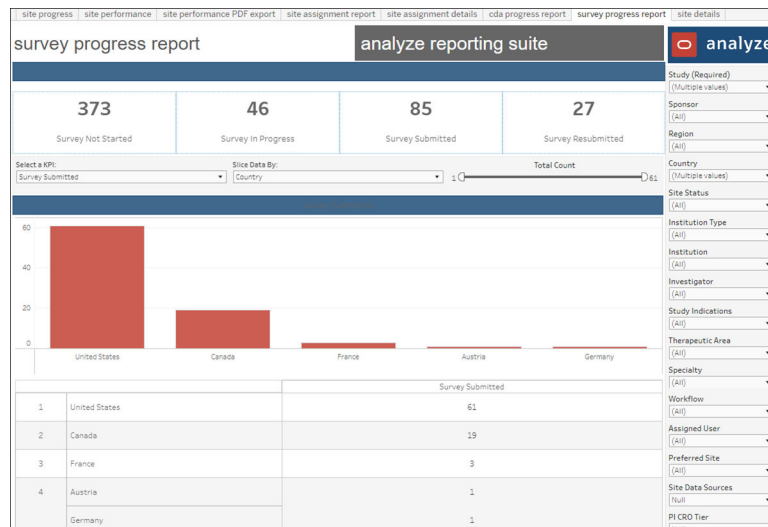


Survey Progress Report

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



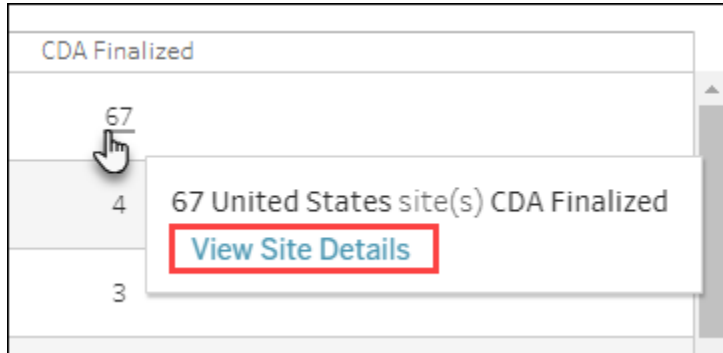
Site Details

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

Study Name	Investigator	Country	Institution	Institution Type	Source	Recruitment	Site Status	CDA Status	Source	PI Name	PI Email	PI Phone	PI Email	Severity	Sponsor
AL0001B3	Amc	United States	Tennessee	Null	No	Included	Downloaded	N/A	Null	jam	jam	jam	jam	Null	Amc
AL0001B4	Amc	United States	Tennessee	Null	No	Included	Downloaded	N/A	Null	jam	jam	jam	jam	Null	Amc
AL0001L2	Bax	United States	Yale University	Engineering	No	Included	Downloaded	N/A	Null	ram	ram	ram	ram	Null	Bax
	amc	United States	USC School, Los Angeles	USC	No	Included	N/A	N/A	Null	rajg	rajg	rajg	rajg	Null	Amc
	amc	United States	Thomas	University	No	Included	Downloaded	N/A	Null	kurv	kurv	kurv	kurv	Null	Amc
	Wax	United States	Kean School, Los Angeles	Kean	No	Included	N/A	N/A	Null	karv	karv	karv	karv	Null	Wax
	Wax	United States	Marshall School, Los Angeles	Marshall	No	Included	N/A	N/A	Null	karv	karv	karv	karv	Null	Wax
	Wax	United States	Draper School, Los Angeles	Draper	No	Included	N/A	N/A	Null	karv	karv	karv	karv	Null	Wax
	Wax	United States	UConn University	Engineering	No	Included	N/A	N/A	Null	karv	karv	karv	karv	Null	Wax
	Wax	United States	Lady Shags, Los Angeles	Fashion	No	Included	N/A	N/A	Null	karv	karv	karv	karv	Null	Wax
	Wax	United States	Lady Shags, Los Angeles	Fashion	No	Included	Downloaded	N/A	Null	karv	karv	karv	karv	Null	Wax
	Wax	United States	Lady Shags, Los Angeles	Fashion	No	Included	N/A	N/A	Null	karv	karv	karv	karv	Null	Wax
	Wax	United States	Lady Shags, Los Angeles	Fashion	No	Included	N/A	N/A	Null	karv	karv	karv	karv	Null	Wax
	Wax	United States	Lady Shags, Los Angeles	Fashion	No	Included	N/A	N/A	Null	karv	karv	karv	karv	Null	Wax
	Wax	United States	Lady Shags, Los Angeles	Fashion	No	Included	N/A	N/A	Null	karv	karv	karv	karv	Null	Wax
	Wax	United States	Lady Shags, Los Angeles	Fashion	No	Included	N/A	N/A	Null	karv	karv	karv	karv	Null	Wax
	Wax	United States	WVU New Institution	University	No	Included	Downloaded	N/A	1234567890	karv	karv	karv	karv	Null	Wax
	Wax	United States	UConn University	Fashion	No	Included	Downloaded	N/A	Null	karv	karv	karv	karv	Null	Wax
	Wax	United States	USC	University	No	Included	N/A	N/A	Null	karv	karv	karv	karv	Null	Wax

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

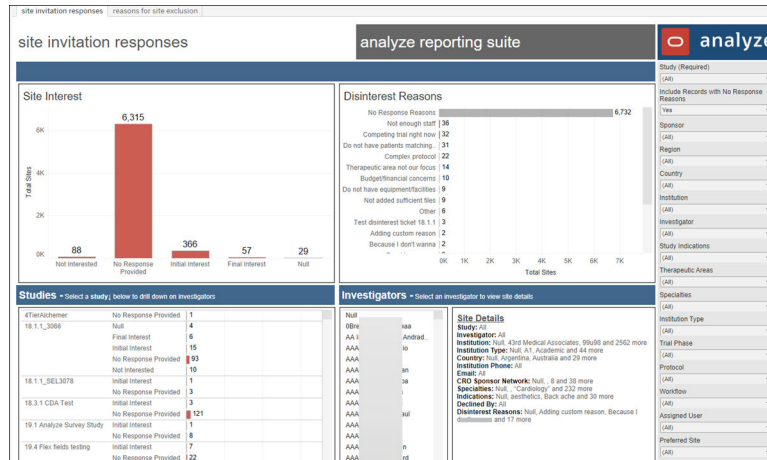
The Oracle Site Analyze Site Study Interest and Exclusion report, intended for Oracle Site Select customers, provides dashboard reports that visualize site invitation response state and reasons for site exclusion or study disinterest.

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 invitation responses reasons for site exclusion

reasons for site exclusion

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Study (required) (All)

Include Records with Empty Responses Yes

Sponsor (All)

Region (All)

Country (All)

Institution (All)

Investigator (All)

Study Indications (All)

Therapeutic Areas (All)

Specialties (All)

Institution Type (All)

Trial Phase (All)

Protocol (All)

Workflow (All)

Assigned User (All)

Preferred Site (All)

Site Exclusion Buckets

Bucket	Count
Do not invite	1,069
Final decline	530
Declined	84
Dropped	5

Exclusion Reasons

Reason	Count
No Response Reasons	466
Poor historical data manag.	34
not enough trial experience	28
Poor recruitment/ random.	27
Does not have sub-i and H.	26
Not/Not enough site person.	26
Does not have adequate fa.	25
Does not have specializat.	17
Regulatory history	17
Does not have ability to han.	15
Previously rejected site also.	14
This is the new reason	9
I don't like this study	4
Custom Reason	2

Studies - Select a study, below to drill down on investigators

Study	Status	Count
18.1_L_3056	Declined	12
	Do not invite	3
	Final decline	3
20.2 OCI testing	Do not invite	1
	Final decline	3
21_L_10114	Declined	1
AccountSP	Dropped	1
Acidity 12 Study	Declined	4
	Do not invite	1
All Data	Do not invite	447
analyze_survey_test	Declined	3
	Do not invite	2
	Final decline	1

Investigators - Select an investigator to view site details

Investigator	Count
AA	3
AAr	234
AAc	1
AAc	1
AAc	1
AAc	1
AAc	1
AAc	1
AAc	1
AAc	1
AAc	1
AAc	1
AAc	1
AAc	1
AAc	1

Site Details

Study: **Null**
Investigator: Null, OBrown@**AA** Investigator Lib
Address: **Carfax and 5017 more**
Institution: **Null, 4163 Medical Associates, 9908 and 2562 more**
Institution Type: **Null, AI, Academic, and 44 more**
Country: **Null, Argentina, Australia and 28 more**
Institution Phone: **All**
Email: **All**
CRO Sponsor Network: **Null, 8 and 38 more**
Specialties: **Null, Cardiology and 232 more**
Indications: **Null, aesthetics, Back ache and 30 more**
Excluded By: **All**
Exclusion Reasons: **All**

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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.).

# of Sites	# of Users	# of Emails	Site Name	Site Info	Communication Info	Sent At	Opened At	Select LITE Accessed At	Completed Workflow Task(s)	Failed Reason	Sponsor	Study Status
1	1	1	Site A	Site Info	Communication Info	08-May-2022 11:04 PM	Null	Null	Yes		Study (Required)	Study Indicators
1	1	1	Site B	Site Info	Communication Info	17-Jun-2022 07:17 AM	Null	15-Mar-2022 08:52 PM	Yes		Study Status	Study Type
1	1	1	Site C	Site Info	Communication Info	22-Jun-2022 07:39 AM	Null	15-Mar-2022 08:52 PM	Yes		Study Indicators	To

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.

# of Sites	# of Users	# of Emails	Site Name	Site Info	Communication Info	Sent At	Opened At	Select LITE Accessed At	Completed Workflow Task(s)	Failed Reason	Sponsor	Study Status
1	1	1	Site A	Site Info	Communication Info	08-May-2022 11:04 PM	Null	Null	Yes		Study (Required)	Study Indicators
1	1	1	Site B	Site Info	Communication Info	17-Jun-2022 07:17 AM	Null	15-Mar-2022 08:52 PM	Yes		Study Status	Study Type
1	1	1	Site C	Site Info	Communication Info	22-Jun-2022 07:39 AM	Null	15-Mar-2022 08:52 PM	Yes		Study Indicators	To

13

Survey Response Analysis

Workbook synopsis

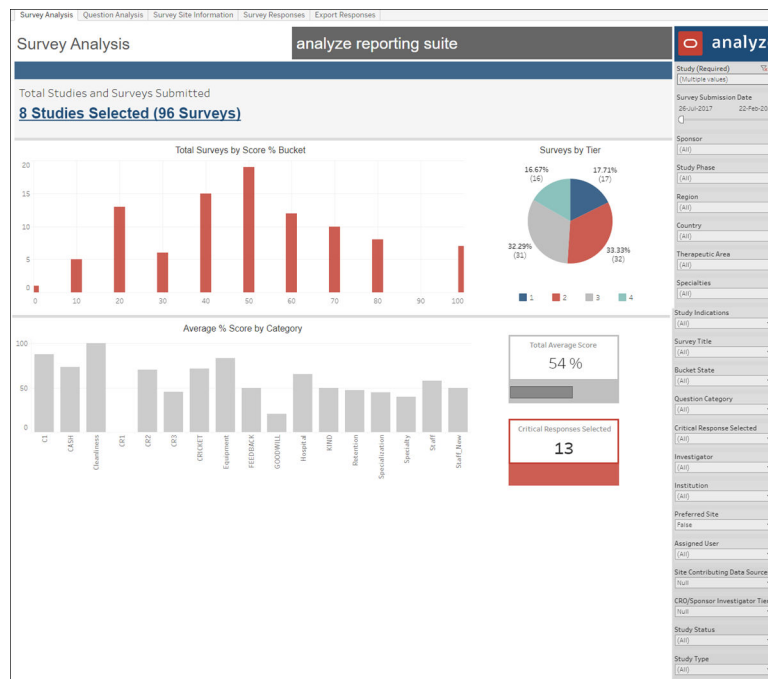
The Oracle Site Analyze Survey Response Analysis workbook, intended for Oracle Site Select customers, provides a detailed dashboard of feasibility survey response data as well as two worksheets designed for data export to CSV.

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.



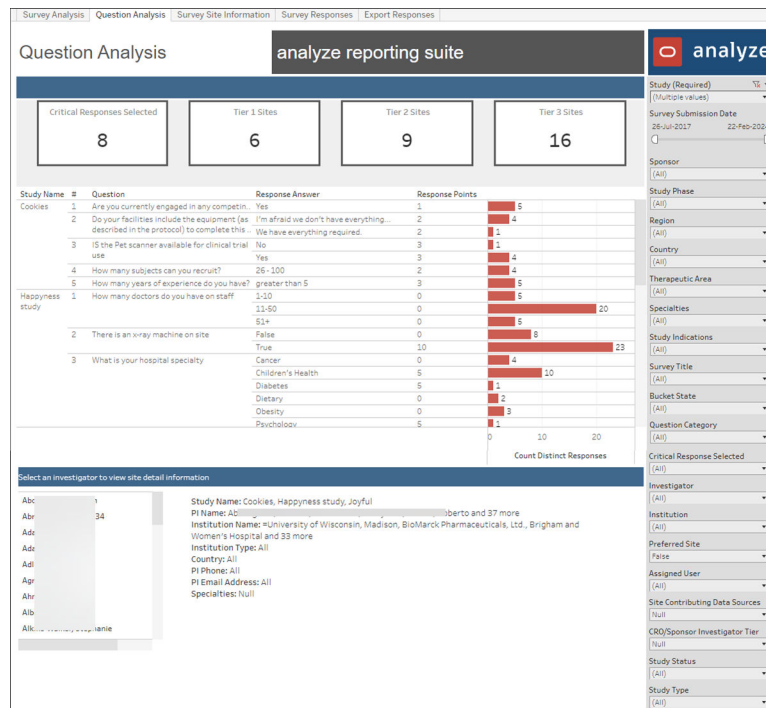
Question Analysis dashboard

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

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Study Name	Sponsor	CRO Sponsor Network	Study Number	Study Interest	Country	Assigned U.	Protocol Name	Site Disinterest	Season	Preferred Site	PI Name	PI E	Survey Submission Date
Coolest	Sponsor A-123	Null	32	Null	United States	Null	Null	Null	False	False	Ar	Ar	26-Jul-2017
<div style="border: 1px solid black; padding: 2px;"> Study (Required) [Multiple values] </div>													
Happyness study	Sponsor XYZ	Null	20	True	United States	Null	Null	Null	False	False	Ar	Ar	22-Feb-2024
					Canada	Null	Null	Null	False	False	Ar	Ar	22-Feb-2024
					France	Null	Null	Null	False	False	Ar	Ar	22-Feb-2024
					United States	Null	Null	Null	False	False	Ar	Ar	22-Feb-2024
					Canada	Null	Null	Null	False	False	Ar	Ar	22-Feb-2024
					France	Null	Null	Null	False	False	Ar	Ar	22-Feb-2024
					United States	Null	Null	Null	False	False	Ar	Ar	22-Feb-2024

Study (Required) [Multiple values]

Survey Submission Date

26-Jul-2017 22-Feb-2024

Sponsor

Sponsor XYZ

Study Phase

Phase II

Region

Region

Country

Country

Therapeutic Area

Therapeutic Area

Specialties

Specialties

Study Indications

Study Indications

Survey Title

Survey Title

Bucket State

Bucket State

Question Category

Question Category

Critical Response Selected

Critical Response Selected

Investigator

Investigator

Institution

Institution

Preferred Site

Preferred Site

Assigned User

Assigned User

Site Contributing Data Sources

Site Contributing Data Sources

CRO/Sponsor Investigator Tier

CRO/Sponsor Investigator Tier

Study Status

Study Status

Study Type

Study Type

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.

Survey Analysis | Question Analysis | Survey Site Information | Survey Responses | Export Responses

Survey Responses

analyze reporting suite

Study Name	Sponsor	Country	Tier	Raw Score	PI Name	Institution	Survey Provider	Survey Response ID	Survey Submission Date	Category	Category Score	Question
Happyness study	Sponsor XYZ	Canada	2	25	Col	d	Saint Joseph's Healthcare Hamilton	Null	05-Dec-2019 04:25:36 AM	CR1	0	1 How willing are you to partic...
									CR2	5	3 What is your hospital special...	
									CR3	20	2 There is an ar-ray machine on...	
									CR3	20	4 Which medications does your...	
Happyness study	Sponsor XYZ	France	3	15	Ma	Julien, Chu Toulouse	Null	01-Aug-2017 01:51:48 PM	CR1	0	1 How many doctors do you ha...	
								CR2	5	3 What is your hospital special...		
								CR3	10	2 There is an ar-ray machine on...		
								CR3	10	2 There is an ar-ray machine on...		
								CR2	5	3 What is your hospital special...		
								CR3	10	2 There is an ar-ray machine on...		
Happyness study	Sponsor XYZ	France	3	15	Ma	Julien, Chu Toulouse	Null	01-Aug-2017 01:53:14 PM	CR1	0	1 How many doctors do you ha...	
								CR2	5	3 What is your hospital special...		
Happyness study	Sponsor XYZ	United States	4	10	Ber	University Hospital, Grenoble	Null	01-Aug-2017 02:12:29:28 AM	CR3	10	2 There is an ar-ray machine on...	
								CR2	5	3 What is your hospital special...		
								CR2	5	3 What is your hospital special...		
								CR3	25	2 There is an ar-ray machine on...		
Happyness study	Sponsor XYZ	United States	1	30	Atp	Tim	University of California, Davis	20-May-2019 12:29:28 AM	Null	Null	5 How willing are you to partic...	
								CR1	0	1 How many doctors do you ha...		
								CR2	5	3 What is your hospital special...		
								CR3	25	2 There is an ar-ray machine on...		
Happyness study	Sponsor XYZ	Asia	San	10	Mar	Mayo Clinic	Null	10-Mar-2020 04:17:34 PM	Null	Null	5 How willing are you to partic...	
								CR1	0	1 How many doctors do you ha...		
								CR2	5	3 What is your hospital special...		
								CR3	25	2 There is an ar-ray machine on...		

Study (Required) [Multiple values]

Survey Submission Date

26-Jul-2017 22-Feb-2024

Sponsor

Sponsor XYZ

Study Phase

Phase II

Region

Region

Country

Country

Therapeutic Area

Therapeutic Area

Specialties

Specialties

Study Indications

Study Indications

Survey Title

Survey Title

Bucket State

Bucket State

Question Category

Question Category

Critical Response Selected

Critical Response Selected

Investigator

Investigator

Institution

Institution

Preferred Site

Preferred Site

Assigned User

Assigned User

Site Contributing Data Sources

Site Contributing Data Sources

CRO/Sponsor Investigator Tier

CRO/Sponsor Investigator Tier

Study Status

Study Status

Study Type

Study Type

Export Responses worksheet

The Export Responses worksheet has been designed exclusively for export and reflects the filters set on the Survey Responses worksheet (described above).

Survey Analysis - Question Analysis - Survey Site Information - Survey Responses - Export Responses														
Export Responses														
Study Name	Sponsor	Country	Year	Res. Score	PI Name	Institution	Survey Protocol Reference ID	Survey Submission Date	Category	Category Score	#	Question	Response Answer	Critical Question
Progress Study	Sponsor	Canada	2	25	Co	Saint Joseph's Healthcare Hamilton	Null	05-Dec-2019 04:03:30 AM	Null	Null	5	How willing are you to participate in this study?	50	Null
								05-Dec-2019 04:03:30 AM	CR2	0	1	How many doctors do you have on staff?	15-50	False
									CR2	5	3	What is your hospital specialty?	Children's Health	False
									CR2	10	2	There is an x-ray machine on site	True	True
									CR2	10	4	Which medications does your hospital have currently?	Insulin	False
													Urtica	False
													Synthroid	False
													1-10	False
													Senior Citizens	False
													True	True
France	3	15	Ma	Hpt	Chu Toulouse	Null	02-Aug-2017 02:04:48 PM	CR1	0	1	How many doctors do you have on staff?	1-10	False	
							02-Aug-2017 02:04:48 PM	CR2	5	3	What is your hospital specialty?	Senior Citizens	False	
								CR2	10	2	There is an x-ray machine on site	True	True	
								CR2	10	1	How many doctors do you have on staff?	15-50	False	
								CR2	5	3	What is your hospital specialty?	Children's Health	False	
								CR2	10	2	There is an x-ray machine on site	True	True	
UK	4	10	Bw	Univ	University of Leicester	Null	02-Aug-2017 02:04:48 PM	CR1	10	2	There is an x-ray machine on site	True	True	
							02-Aug-2017 02:04:48 PM	CR2	10	2	There is an x-ray machine on site	True	True	
United States	1	30	AS	Ten	University of California, Davis	Null	20-May-2019 12:09:35 AM	Null	Null	5	How willing are you to participate in this study?	50	Null	
							20-May-2019 12:09:35 AM	CR1	0	1	How many doctors do you have on staff?	50+	False	
								CR2	5	3	What is your hospital specialty?	Children's Health	False	

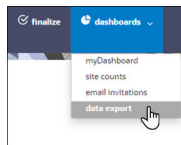
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Data Export Utility

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.

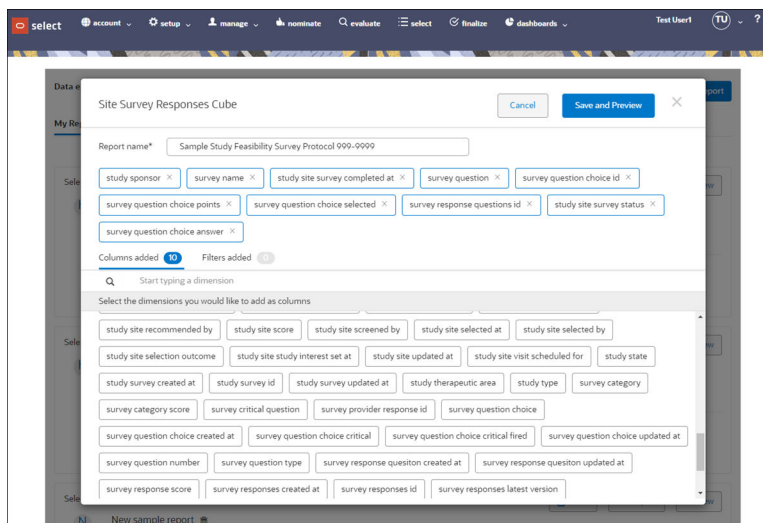


Data extract cubes

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.

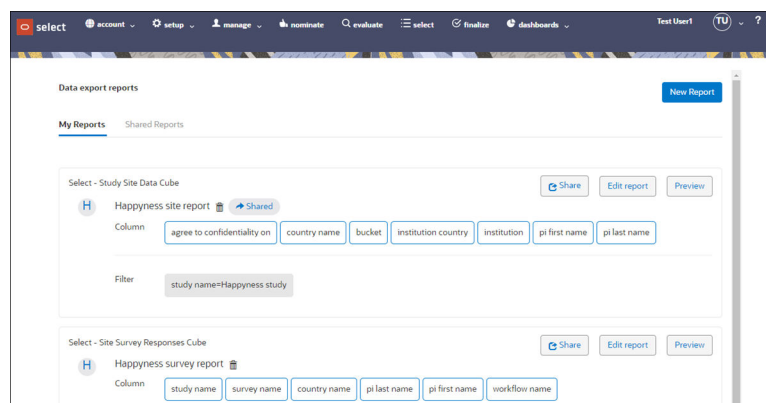
Sample Study Feasibility Survey Protocol 999-9999 Total records: 3191

Study Survey Id	Survey Question Choice Id	Study Sponsor	Survey Name	Survey Question Choice Answer	Survey Question	Survey Question
091ad8d6-d631-40...	0039f6c85-6573-4868-bd11-f77cae...	Test123	Regular site		Which Special Cha...	0
091ad8d6-d631-40...	034809d2-ec79-42c8-a186-698a0...	Test123	Regular site	Yes	1 2 3 #<b...	
091ad8d6-d631-40...	05cdda32-7c45-4969-b336-4808b6...	Test123	Regular site	Yes	1 2 3 #<b...	
091ad8d6-d631-40...	075adf73-b4f8-41cf-a65a-61354bd...	Test123	Regular site		1, #, \$, %, ', (,), *, +, ...	10
091ad8d6-d631-40...	0a8de1f8-ae41-4675-8330-0994f81...	Test123	Regular site	Yes	1 2 3 #<b...	
091ad8d6-d631-40...	0d832400-594c-40ca-ad62-3c1c5a...	Test123	Regular site	Yes	1 2 3 #<b...	
091ad8d6-d631-40...	0f797ba2-350e-4399-9968-a31606...	Test123	Regular site	yes	1 2 3 #<b...	
091ad8d6-d631-40...	10023e44-ee68-46a3-8477-0030f4...	Test123	Regular site	No	1 2 3 #<b...	
091ad8d6-d631-40...	12423e4e-6fa0-4422-9aa4-0ca9ab...	Test123	Regular site	Yes	1 2 3 #<b...	
091ad8d6-d631-40...	15ef03e8-ecd5-4e3f-8460-11dbaa8...	Test123	Regular site	No	1 2 3 #<b...	
091ad8d6-d631-40...	150aa0b3-c0cd-4590-83c4-86a7a...	Test123	Regular site	Yes	1 2 3 #<b...	
091ad8d6-d631-40...	1c02fb51-af63-4f18-bb8d-2e4308b...	Test123	Regular site		Which Special Cha...	10
091ad8d6-d631-40...	1c8a525e-88ed-4331-a164-3a2f24d...	Test123	Regular site	No	1 2 3 #<b...	
091ad8d6-d631-40...	1f49f886-2eb6-4fab-afcc-15a4df73...	Test123	Regular site	Yes	1 2 3 #<b...	
091ad8d6-d631-40...	20f0ab77-27d5-4102-8d04-f4bd07c...	Test123	Regular site		Which Special Cha...	0
091ad8d6-d631-40...	22921c48-cda8-42f0-9f51-d79d5dc...	Test123	Regular site	yes	1 2 3 #<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



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**.