Oracle Life Sciences Site Analyze Cloud Service Using Oracle Site Analyze: For Oracle Site Select Users



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Oracle Life Sciences Site Analyze Cloud Service Using Oracle Site Analyze: For Oracle Site Select Users, Release 24.1

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Preface

This preface contains the following sections:

- Documentation accessibility
- Diversity and Inclusion
- Related resources
- Access to Oracle Support

Documentation accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Diversity and Inclusion

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

Related resources

Product documentation and other supporting materials are available on the Oracle Help Center.

Access to Oracle Support

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

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

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

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



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About the data dictionary, access, and user roles

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

Getting started with Oracle Site Analyze

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

A data dictionary that reflects your work

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

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

Accessing Oracle Site Analyze

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

Roles control access to information

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

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



2 About viewing reports and using Tableau

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

Project dashboard and workbooks

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

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

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

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

Export formats

You can export your report data in the following formats:

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



Note:

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

Sharing web views

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

Note:

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

Procedures

The links below redirect to Tableau online documentation.

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



3 Account Metrics

Workbook synopsis

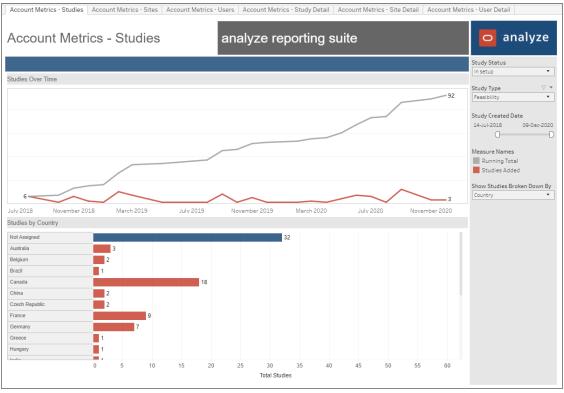
The Account Metrics report workbook, which is intended for Oracle Site Select customers, includes dashboard views of studies, sites, and Oracle Site Select users as well as detailed cross-tab sheets of each.

Dashboards and sheets

Account Metrics - Studies

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

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



Account Metrics - Study Detail

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



Account N	letrics - Stud	y De	etail	analyze	reportir	ng suite		o analyze
								Study Status
Study Name	Protocol Name		Sponsor	Study Phase	Compound	Study Created Date	Total Sites Nominated	(AII)
18	DEI		Null	Phase III	Null	12-Apr-2018	90	Study Type
18	12:		Null	Phase IV	Null	05-Apr-2018	<u>56</u>	(AII)
18	DEI		Null	Phase II	Null	02-Nov-2018	105	
19	SSF		Null	Phase II	Null	21-Feb-2019	14	Study Created Date
19	19.	ng	Null	Phasell	Null	05-Nov-2019	29	27-Jun-2017 09-Dec-202
20	1.0			3	Null	09-Jun-2020	4	0
20	SSF		Skyline Pharma	2	Null	05-Jun-2020	15	Protocol Name
20	78 100			2	Null	16-Sep-2020	11	(AII)
_F	Nul		Null	Null	Null	04-Nov-2019	Q	(60)
_F	esP\	ind.	Null	Phase I	Null	20-Sep-2019	2	Sponsor
Ac	905		Null	Null	Null	28-Sep-2020	Q	(AII)
Ac	ASF		Null	1	Null	28-May-2020	<u>57</u>	-
Ac	Aci		Null	Phase I	Null	11-Sep-2017	94	Study Phase
ac	1		Null	Null	Null	23-Sep-2020	Q	(AII)
AI	AllF		Null	Phase II	Null	22-Jan-2018	457	
an	24			Phase III	Null	25-Mar-2019	35	Compound
Ar	2			Phase I	Null	22-Mar-2019	85	(AII)
Ar	172		Null	Null	Null	15-Nov-2019	Q	
CS - cgr coordina	XY2		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.



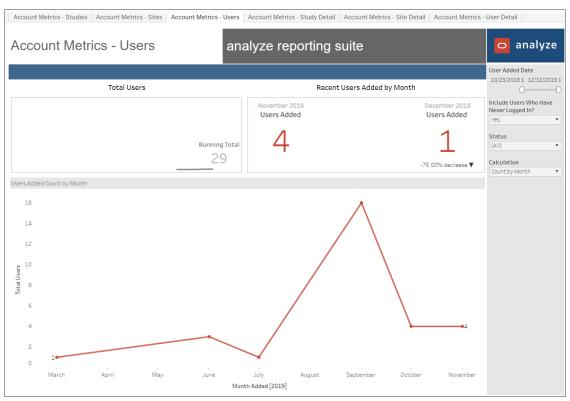
Account Metrics - Site Detail

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.).

Accour	nt Metri	cs - Sit	e Deta	il	analy	ze repo	rting su	uite				o anal	yze
Study Name	Protocol Name	Country	PI Last Name	PI First Name	Institution	Institution Type	Bucket State	PI Phone	Email		Specialty	Study (Required)	
18.3.1 CDA	DEMO	United States	Bussel	James	Cornell University	inst type	Invited	212.746.3400	nik		Respiratory Medici.		
Test									50		Respiratory Medici.	Protocol Name	
			Nathan	Steven	Inova Fairfax Hospital - Inova Transplant Cente.	Community	Invited	703-776-2986	sti	m	Critical Care Medici Internal Medicine	DEMO	
			Strange	Charlie	Medical University of S.	Hospital	Invited	843 7922153	str		Pulmonary Disease	Study Status	
Happyness	DEMO	France	Bourdin	Arnaud	Oxford University	Hospital	Short list	+33 467 336 126	ad	elli	Allergy & Immunolo Pulmonary Disease	In setup	
		United States	Abbes	RAJAT	ABC Hospital	Hospital	Declined	Noll	80		Null	Study Type	
		Officed States	Abernethy2	Am	Duke University	Oxford	Do not invite		55			Feasibility	
			Horneoije		o one or mer only	0100		400010202	20	adi.			
			Aboumatar	Hanan	Johns Hopkins Universi.	Hospital	Final accent	410 502 7384	ha			Country (Multiple values)	
			Abrahams	Roger	Carnegie mellon	Hospital	On hold	Null	m	20		(Multiple values)	
									10		Noll	Bucket State	
			Abrams	Thad	Department of Veteran.	Public	Final accept.	Noll	th	nm	Pulmonary Disease	(AII)	
			Agerwal	Sunil	Wellson University	Oxford	Invited	Null	50		Null		
									to		Noll	Institution Type	
			Alden	Carter	Johns Hopkins Universi.	Fashion	Invited	Noll	ca		Null	(Multiple values)	
			Aryal	Shambhu	University of Kentucky	Primary	Invited	Null	58		Null		
			Bajaj	Sapna	Cornwell University	Finance	Invited	Noll	50		Null	Institution (AII)	
							Nominated	Noll	5-8		Noti	(All)	
							Short list	Noll	50		Null		
			Bale	Christian	Christian University	Movies	Invited	Noll	Ch		Null		
			Ben	Shradha	University of Maharas		Invited	8779966789	Sh		Null		
			Bennet	Elizabeth	University of California.		Invited	Null	QB	er.			
			Bishai	William	Johns Hopkins Universi.		Final accept.		de	12			
			Boldogh	Istvan	University of Texas Ga	Hospital	Invited	Null	sb		Null		
			Kapoor	Shammi	University of Madras,	Management	Short list	Null	Sh		Null		
			Man	Hello	Dumplings University	Food	Review	Null	he		Null		
							Short list	Null	he		Null		
				Super	Dumplings University	Food	Nominated	Null	50		Null		

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 Me	etrics - Use	r Detail		anai	yze re	eporting suite			o a	nalyze
									Created 19/10/2017	17/12/20
Email		First Name		Last Name		Created	Last Login	Status	0	
an		An		Sh		29/07/2019	29/07/2019	Active	*	
be		Be		Te:		05/03/2019	05/03/2019	Active	Last Login	0.0 (4.0 (0)
bo		Bo		Lav		10/09/2019	10/09/2019	Active	17/07/2018	26/12/20
da	l.com	Da		Bla		10/09/2019	14/09/2019	Active	0	
de		De		Co	er	09/09/2019	09/09/2019	Active	Include Users	Who Have
de		De		CD		09/09/2019	12/09/2019	Active	Never Logged	d In?
de		De		Us		11/06/2019	18/12/2019	Active	Yes	
fdc		Fra		Do		19/10/2017	Null	Active		
gb		Joi		Se		18/09/2019	19/12/2019	Active	Status	
gb		Co		Sig		30/10/2019	Null	Active	(AII)	
go		Or		Co	er	28/10/2019	Null	Active		
go		Ra		Jac		10/09/2019	26/11/2019	Inactive		
go		Ra		Jac	1	12/09/2019	12/09/2019	Active		
joe		Joi		Ze		27/06/2019	20/12/2019	Active		
jus		Ju		Gn		10/06/2019	09/12/2019	Active		
pla		Pra		Se		23/09/2019	Null	Active		
pri		pri		lar		25/09/2019	Null	Active		
pri		pra		sel		24/09/2019	26/12/2019	Active		
pri		Pri		Se		26/09/2019	21/10/2019	Active		
qa		QA		Ad		12/09/2019	30/09/2019	Active		
qa		QA		An		12/09/2019	Null	Active		
qa		QA		Co	er	10/09/2019	05/12/2019	Active		
qa		QA		FS		10/09/2019	10/12/2019	Active		
qa		QA		Se		10/09/2019	10/09/2019	Active		
sir		Sti		Sta		25/10/2019	18/11/2019	Active		
sir		Sir		Du		15/11/2019	Null	Active		
sir		Sir		Du		15/11/2019	Null	Active		
sin		Sir	er	Du		15/11/2019	15/11/2019	Active		
sin		Sir	-	Sir		18/10/2019	15/11/2019	Active		
sir		Sir		Sd		07/11/2019	13/12/2019	Active		
sra		Sra		An		17/07/2018	17/07/2018	Active	-	

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.



y cycle times			🗧 analyze
npare Data By: Choo udy • Day	se a Unit of Measure: Com	pute Cycle: Min / Max Cycle Isan • 1 1 100	Study (Required) (All)
number of cycles	cycle measure	Select Cycle Start: Select Cycle End:	Study Sponsor (All)
		CDA task evailable CDA finalized	Region
	44.5		(All)
32	11.5	•• • • • • •	Country
	Day(s)		(All)
		2 4 6 8 10 12 14 16 18 20 22 24 26 28 30	Site Status
number of cycles	cycle measure	Select Cycle Start: Select Cycle End:	(All)
		Site invitation Sent Site invitation Reviewed	Institution
			(All)
205	8.0		Investigator
	Day(s)		(All)
		10 20 30 40 50 60 70 80 90	Study Indications
number of cycles	cycle measure		(AII)
		Select Cycle Start: Select Cycle End: Site invitation Sent • Final Acceptance •	Therapeutic Area
			(All)
37	3.0		Specialty
57	Day(s)		(AII)
		10 20 30 40 50 60 70 80	
number of cycles	cycle measure		Workflow (All)
number of cycles	cycle measure	Select Cycle Start: Select Cycle End: Survey Task Available Survey Submitted	
		Survey leak evaluable	Preferred Site (All)
71	10.0		
/1	Day(s)	• • • • • • • • • • • • • • • • • • •	Study Status
	547(4)	5 10 15 20 25 30 35 40 45 50 55 60 65 70 75 80	
			Study Type

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.

key cycles cycle analysis c	ycle detail data export					
ycle analysis					🗖 analyz	ze
	Cycle End: Group Data By: vitation Reviewed • Country	Compare Data By:	Compute Cycle: Min/Max Cycle Median Min/Max Cycle	Sort Table By: Group	Study (Required)	
					Study Sponsor	
Null					(Multiple values)	
Belgium				4	Region (All)	
beigium				* *	Country	
Brazil ()					(AII)	
					Site Status	
Canada (•		(AII)	
F					Institution	
Denmark ((AJI)	
France	0				Investigator (All)	
5 10	15 20 25 30 3	5 40 45	50 55 60 65 70 75	80 85 90 95 100	Study Indications	
			No. of Cycles	Cycle Measure	(AII)	
				31.0	Therapeutic Area	
lull	18.1.1_3066		3	Day(s)	(AJI)	
inited States					Specialty	
nited States	18.1.1_3066				(AJI)	
nited Kingdom	20.2 OCI Study-Chirag				Workflow (All)	
niteo kingoom	20.2 Oct Stoby-Chirag				Preferred Site	
ance	Acidity 12 Study				(AII)	
					Study Status	
					(Multiple values)	
					Study Type	
				Date as of 2/23/2024 1/36/05 PM U.S. Pacific	(IIA)	

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.



cle deta	il										🖸 analy	ze
											Study (Required)	
dy Name	Study Sponsor	Country	Institution	Investigator	Site Status	Cycle Start	Cycle Start Date	Cycle End	Cycle End Date	Cycle Time	Study Sponsor	
								Site Invitation			(Multiple values)	
1_3066		Null	8	A: *****	Selected	Site Invitation Sent	16-Feb-2021	Reviewed	19-Mar-2021	31	Region	
											(AII)	
											Country	
				Et er	Selected	Site Invitation Sent	26-Sep-2019	Site Invitation Reviewed	15-Oct-2019	19	(All)	
			(hopping					ner en			Site Status	
											(AII)	
			Manfalana Production	Silline	Invited	Site Invitation	17-Sep-2019	CDA task available	25-0ct-2019	38	Institution	
			Unit	51 1/6	INVICED.	Reviewed	1//560/2019	COA cask available	2010002010	20	(All)	
								Site Invitation			Investigator (All)	
						Site invitation Sent	25-Jun-2019	Reviewed	17-Sep-2019	84		
											Study Indications	
											(AII)	
		Regione and Boreer's Register	5/ n	Final	Site Invitation	16-Sep-2019	CDA finalized	25-Oct-2019	39	Therapeutic Area		
				acceptance	Reviewed					(AII)		
										Specialty		
											(AII)	
		Unit						CDA task available	25-Oct-2019	39	Workflow	
											(AII)	
											Preferred Site	
						Site Invitation Sent	16-Sep-2019	CDA finalized	25-Oct-2019	39	(AII)	
											Study Status (Multiple values)	
								CDA task available	25-0ct-2019	39		
											Study Type	

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 intended for export to I																	Study (Required)	
Study Name	Study Spon	Region	Country	Institution	Investigato		Site Status	Täpekfloor	Preferred S.	Cycle Start	Cycle Start Date	Cycle End	Cycle End Date	Cycle Time	Cycle Unit		Study Sponsor	
18.1.1_3066		19/1	Null		Aar		Selected	response test	No	Site Invitation Sent	16-Feb-2021	Site Invitation Reviewed		31	day	Abc	(Multiple values)	
				Drighter an.	Dr.	ander	Selected	Standard tasks 11	No	Site Invitation Sent	26-5ep-2019	Site Invitation Reviewed	15-Oct-2019	19	day	Abc		
					515		Invited	9090908890-98009-	. No	Site Invitation Reviewed	17-Sep-2029	CDA task available	25-Oct-2019	30	day	Abc	Region	
				Evaluation						Site Invitation Sent	25-349-2019	Site Invitation Reviewed	17-Sep-2019	04	day	Abc	(40)	
				New Orleans	Sm		Final	Standard tasks 2	No	Site Invitation Reviewed	16-5ep-2019	CDA finalized		29	day	Abc	Country	
				Center			acceptance					CDA task available		29	dev.	Abc	(All)	
				Clinical						Site Invitation Sent	16-5ep-2019	CDA finalized	25-0-12019	29	dex	Abc		
				Research								CDA task available	25-Oct-2019	29	des	Abc	Site Status	
		Namer	Canada	Oregon	Ket	40	Invited	\$09000089000009-	No	Site Invitation Sent		CDA finalized		48	dex	Abc	(40)	
				Health and								CD3 task available		48	dev	Abc		
			United Stat		Dw	Seatte	Invited	\$030308280R0008-	No	Site Invitation Sent	09-Dec-2029	Site Invitation Reviewed	14-Jan 2020	36	day	Abc	Institution	
0.1.1.56(3070		NUL	Null	Weshington			Final.	Standard tasks	No	Site Invitation Reviewed		CDA finalized	2%-Sec-2019	1	day.	Abc	(AIQ	
				University			acceptance					Final Assestance	26-Sep-2019	1	day	Abc		
				School of						Site Invitation Sent		CDA Rinalized	26-Sep-2019	1	dev	Abc	Investigator	
				Medicine								Final Acceptance	26-5ep-2019	1	day	Abc	(MI)	
		Nämer	United	University of	BN	las/III	Selected	Standard tasks	No	Site Invitation Reviewed	25-5ep-2019	CDA finalized	11-Dec-2019	77	dev	Abc	Shady Industries	
			States	Michigan						Site Invitation Sent	25-540-2019	CDA Rinalized	11-Dec-2019	77	dev	Abc	(All)	
0.2 OCI Study-	Pfiper	EMEA	United King	Royal Wolv.	Om:		Invited	Generic Document Wo.	No	Site Invitation Sent	28-Apr-2022	Site Invitation Reviewed	04-May-2022	6	dev	AM		
		Nämer	United	University Of	1 Abril	ard	Backup	Standard tasks	No.	CDA finalized	09-Jun-2020	Survey Submitted	24-Aug-2020	76	day	Abi	Therepeutic Area	
			States	lova						CDA task available	09-Jun-2020	Survey Submitted	24-Aug-2020	76	day	Abc	(40)	
										Site Invitation Reviewed		Survey Submitted	24-Aug-2020	76	day	Abc		
										Site Invitation Sent	09-347-2020	Survey Submitted	24-Aug-2020	76	day	Abc	Speciality	
										Survey Task Available	09-Jun-2020	Survey Submitted	24-Aug-2020	76	day	Abc	(40)	
0.2 OCI testing	Skyline	Namer	Canada	Test	Aar		Final	Standard tasks	No	CDA finalized	02-Sep-2020	Final Acceptance	25-Nev-2020	05	day	Abc		
	Pharma			1151/049-011			alceptance			CDA tack available	01-5ep-2020	Final Acceptance		85	day	Abc	Horkflow	
										Site Invitation Reviewed	02-Sep-2020	Final Acceptance		05	day.	Abc	(44)	
										Site Invitation Sent		Final Acceptance		85	day	Abc	Preferred Site	
			United		Abc	Hanan	Invibed.	Standard + no COA	No	Site Invitation Reviewed	08-344-2020	Survey Submitted	24-Aug-2020	77	day	Abc	(20)	
			States	Medical						Site Invitation Sent	09-341-2020	Survey Submitted	24-Aug-2020	77	Cay.	Abc		
				university						Survey Task Available	08-344-2020	Survey Submitted	24-Aug-2220	77	day	Abc	Study Status	
countSP		NAmer	United	Department	Abr	d	Invited	Standarditasks	No	Site Invitation Reviewed	08-344-2020	Survey Submitted	09-241-2020		day	Abc	(Multiple values)	
			States	of Veterans						Site Invitation Sent	09-344-2020	Survey Submitted	09-241-2020		649	Abc		
				Attairs						Survey Task Available	08-34+2020	Survey Submitted	09-24-2020		day.	Abc	Study Type	
					Adv	Ira	Invited	Standard tasks	No	Site Invitation Sent	08-344-2020	Survey Submitted	09-241-2020		Cay .	Abc	(AII)	
										Survey Task Available	08-34+2020	Survey Submitted	09-747-2020		dey	Abc		
					454	24i	Invited	Standard tasks	Max	Site Invitation Sent	OR-deate-2020	Survey Submitted		70	dex	Aber .		

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.

														_														
nter up to 5 se	arch terms	i, separated by	a comma	e.g. CDA	, site delay)		Search Type			ch Target		Case Sensitive	Study (Required) (Multiple values)															
							And	•	Not	es	•	No	Date Range of Note															
													27-Jun-2017 28-Se;															
Study Name	Bucket	Bucket State	PI Name		Institution	Country Name	Context	Created By		Created At			-															
											Axis		Note Type															
							CDA Submission	с	son	07-Feb-2023 08:14:18 AM			(AII)															
		Final			University of					08:14:18 AM			Sponsor															
		acceptance	Cor	srson	Pennsylvania	United States					good Dr	one	(AII)															
							Fully executed	A	a	07-Feb-2023 08:17:31 AM	,		Bucket															
							CDA			08/17/31 AM			(All)															
fina AS_SELECT_0 2	finalize										Not end	ough trial experience																
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AS_SELECT_0 Final decline		Pittsburgh					12:29:39 AM																					
Ministra Description risk Description risk Description risk Description risk Description Description <thdescription< th=""> <thdescription< th=""> <</thdescription<></thdescription<>		Final decline			Contractory of the						Poor bi	storical data management																
					Philadelphia					12/34/41 AM																		
							CDA Submission	R	ter																			
										10:27:34 PM																		
	select	Selected	Selected	Selected	Selected	Selected	Selected	Selected	Selected	Selected	Selected	Selected	Selected	Selected	selectéd	selected	Rol	th		United States					5			
		JEIECLEU	Selected	Selected	Selected	Jeletten	Selected	Selected	Jeretteo	Jeretteo	Selected			Anned Disperses			A	a										
										CDA			10/28/57 PM															
											i am do	ne from my end																
AS_SELECT_0 feeline						CDA Submission	A																					
		Final								09:07:29 PM																		
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					Diego		Fully executed CDA	A	a	14-Feb-2023 09:09:19 PM			Assigned User (All)															
5							COM			03/03/13 PM			Created By															
											I am do	ne	(All)															
AS_SELECT_0 finali: S AS_SELECt_1 finali: 4 Null	finalize	Final acceptance	Mit	stri	Johns Hopkins University	United States	CDA Submission	N	ri	27-Feb-2023 01:14:41 AM			Investigator															
		acceptonice			or mananty					V			(All)															
											This is a	a note to end ontract	Institution															
	Null	Null	Nu		Null	United States	Study note	A	a	07-Mar-2023 03:29:41 AM			(All)															
										10-10-10 AM			Preferred Site															
					Children's		Evelopeter D			01-Mar-2023	Poor hit	storical data management	(AII)															
	evaluate	Do not invite	Juc	tin	Hospital of	United States	Evaluate - Do not invite	A	a	01-Mar-2023 02/39/05 AM			Study Status															
					Pittsburgh								(AII)															
			Att	15	University Of Texas Health					28-Jun-2023	Do not	have patients matching	Study Type															

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 Ex	nort											Study (Required)	Therapeutic Area			
NOTES EX	pore											(Multiple values) •	(AII)			
Study Name	Bucket	Bucket State	PI Name		Institution	Country Name	Context	Created B)		Created At		Date Range of Note	Specialties			
		Final					CDA Submission	Ce	rson	07-Feb-2023 08 14 18 AM	Axis	27-Jun-2017 28-Sep-2028 0 D Note Type	Study Indications			
		acceptance	Cor	son	University of Pennsylvania	United States				07-Feb-2023	good Done	(All) •	(AII)			
							Fully executed CDA	Ar	18	07-Feb-2023 08-17-31 AM		Sponsor	Assigned User (AII)			
S_SELECT_0 Final decline	On I		University of	United Parates	Select - Declined			02-Mar-2023	Not enough trial experience	(AII) •	Created By					
AS_SELECT_0				on	Pittsburgh	United States	Select - Declined	H.	18	12:29:39 AM		Bucket	(AII)			
Pinal decline	Jon	erge	Children's Hospital of	United States	Select - Declined	Ar	18	02-Mar-2023 12:34:41 AM	Poor historical data management	Bucket State	Investigator (AII)					
Jor			Philadelphia					12-34-41 M/H		(A/I) ·	(41)					
select Selected Rol			Memorial Hospital		CDA Submission	Rc	zer	01-Mar-2023 10:27:34 PM	5	Study Phase (All)	(AII)					
	Selected F	Selected	Selected	Selected F	Selected F	Selected R	Rot	2	For Cancer And Allied Diseases	United States	Fully executed			01-Mar-2023	1	Region
							CDA	Ar	18	10:28:57 PM		(All) •	14-4			
					University of		CDA Submission	Al		14-Feb-2023 09:07:29 PM	i am done from my end	Country Name	(AII)			
AS_SELECT_0 5	_SELECT_0 finalize Final Acceptance	Ala		California, San Diego	United States					good	Context	Study Type (All)				
					O INTO		Fully executed CDA	Ar	18	14-Feb-2023 09-09-19 PM		(AII) ·	(way)			
AS_SELECt_1	finalize	Final acceptance	Mic	ri	Johns Hopkins University	United States	CDA Submission	M	tri	27-Feb-2023 01-14-41 AM	l am don e					
	Null	Null	Null		Null	United States	Study note	Ar	18	07-Mar-2023 03-29-41 AM	This is a note to end cntract					

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)

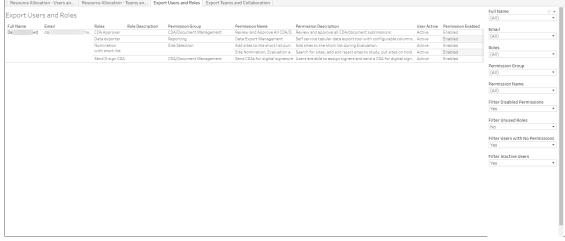
The center of the dashboard includes two tables: Users and Roles

- 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 Alloc	ation - Use	rs and Role	S						User Name (AII)	
elect a user, role, or permission	from the lists below to	view all associated record	ds.						Email	
Total U	carc		Total Role	20			Total Permission	c	(AII)	
Total 0.	5015		Total Ron				10101110111133101	5	Roles	
113	3		41				31		(AII)	
(110 sele	cted)		(39 enabled	i)			(29 enabled)		Filter Users w/ No	o Permis
									Yes	
		Jsers					Roles		Filter Unused Rol	es
ar	n An		24				Analyze ad	cess Enabled 🔺	No	
at	An	2					API A	dmin Enabled		
a:	An	1					Assigned CDA negot		Filter Inactive Us	ers
a:	An	0					BP collaborator man		Yes	
a:	An	0					Business partner collaborator			
be	Be	0					CDA Appr		Generate E	xport
bc	.com Bo	1					CDA Counter S			-
ct	Cer	ij	16				CDA Mar			
da)gmai Da	4					CDA Negoti CDA Uplo			
de	De	3					CDA Upic Country Manager			
de	1 De	lo 🔳 2			-		Dashboard Vi			
		0 10	20	30 4	40		Data Export Mar			
		Tota	Roles	•			Data exp			
								*	Grid Filters	
er Permissions									Filter Disabled P	ermissi
									Yes	
Permission Name	Permission Description			Role Name			Permission Group			
Add sites to the short list during Evaluation	Add sites to the short I	ist during Evaluation.		Country Ma		N	Site Selection	Enabled	 Permission Grou 	
toring Evaluation				Everything	except bp		Site Selection Site Selection	Enabled	(AII)	
							Site Selection	Enabled	Permission Nam	~
				Nomination Select User		tlist	Site Selection	Enabled	(AII)	c
							Site Selection	Enabled	(61)	
				Site Selecti Study Man		er	Site Selection	Enabled		
analyze reports	Access Analyze reports			Analyze ac	-		Reporting	Enabled		
inalyze reports	Access Analyze reports			Everything			Reporting	Enabled		
API and Authentication	Manage ADI interaction	ns and Authentication set	bhiana fau	API Admin			Account Management	Enabled		
/anagement	account.	is and Authentication set	congs for	Everything			Account Management	Enabled		
-	User in the Business D	rtner collaborator's acco	unt that can be			aborator ::	Business Partner Collaboration	Enabled		
DA counter-signer		his permission are listed					CDA/Document Management	Enabled		
son counter signer		al signatures is enabled i		Everything			CDA/Document Management	Enabled		
DA/Document Template	Upload study CDA/docu	ment template		CDA Manag			CDA/Document Management	Enabled		
Inload				Continuing					*	



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:

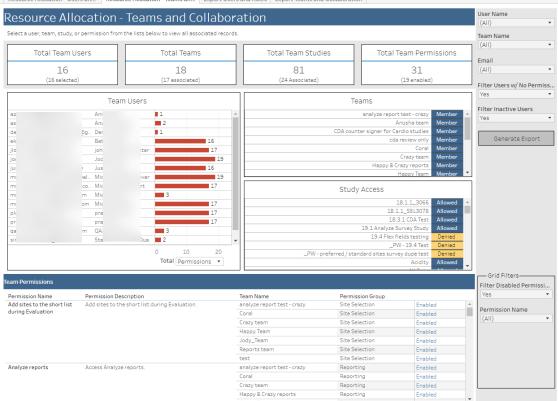
 Click a team name and the dashboard displays a list of all studies members of that team can view



 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.



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

xport Tea	ams and Collabo	pration								Full Name (All)	
Full Name	Email	Team Name	Team Description		Permission Group	Permission Name	Permission Description	User Active	Permission Enabled	Email	
e ier	ek i to.	. analyze report test - crazy		18.1.1_3066	CDA/Document Management		Upload study CDA/document template.	Active	Enabled	(AII)	
							Negotiate assigned CDA/document submissions only. This per	Active	Enabled .	1000	
							. Review and approve all CDA/document submissions.	Active	Enabled	Team Name	
						Review and Approve Assigned	Review and approve assigned CDA/document submissions only	Active	Enabled	(All)	
					Reporting	Analyze reports	Access Analyze reports.	Active	Enabled		
						View Dashboards	View analytical dashboards.	Active	Enabled	Permission Group	
					Site Management	Edit Site Profiles	Make changes to profile information for sites, verify site profil.	Active	Enabled	(AII)	
						Export Sites to Activate	Export sites from goBalto Select into goBalto Activate.	Active	Enabled		
						Site Selection Approval	Approve sites for invitation to participate, and for activation.	Active	Enabled	Permission Name	
					Site Selection	Add sites to the short list duri	Add sites to the short list during Evaluation.	Active	Enabled .	(AII)	
						Revert site finalization	Add sites to the Selection bucket during Finalization.	Active	Enabled	Filter Disabled Permis	
						Site Nomination, Evaluation a	Search for sites, add and reject sites to study, put sites on hold.	Active	Enabled	Yes	5101
					Study Management	Email Template Management	Review, edit and approve email templates.	Active	Enabled	169	
						Select Lite Workflow Configur	Configure Select Lite workflow and upload documents on behal.	Active	Enabled .	Filter Users with No P	4erm
						Study Setup Management	Upload study protocols, set study parameters, milestones and	Active	Enabled	Yes	
					Survey Management	Feasibility Survey Management	Configure feasibility survey and survey scoring for study.	Active	Enabled		
				18.1.1_SEL3078	CDA/Document Management	CDA/Document Template Uplo	Upload study CDA/document template.	Active	Enabled	Filter Inactive Users	
						Negotiation for assigned CDA/	Negotiate assigned CDA/document submissions only. This per	Active	Enabled	Yes	
						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)."

Contract:	Oracle Se	elect Te	rm 2 Year	1 (Inacti	ve) Unit of I	Measu	rement: St	udv				Study (Required)	
					and ending on 5-Aug-							(AII)	٠
	ne This Month		Active None Last		Active Studies Th		New Studies	-	Studies Rema		Total Contract Fees	Unit of Measurement	
Active No	ne i nis Month		active None Las	Month	Contract Term	15	Contract Te		Contract		This Term	Study	•
						_	1	_	0		\$2	Contract	
					4		T		0			Oracle Select Term 2 Year 1	٠
												Study	
elect a month be	low to filter the	bottom act	ivity grid									(Multiple values)	٠
Month			studies By Mon	th	3							Sponsor	
5/2021		2										(None)	
4/2021		1			Active Studies by Month 7		~	~		~			
3/2021		2			th ud	/						Protocol	
2/2021		1			Mo	1						(AII)	•
		1			10.4								
												teresta alter	
		4										Institution	
		1			0							(All)	•
		1			0	rt 2020	October 2020	December	2020 Feb	ruary 2021	April 2021 June 202	(All)	
10/2020	now to drill-dow	1 1 1	ine of recent acti	vity	0	rt 2020	October 2020	December	2020 Feb	wary 2021	April 2021 June 202	(AII)	•
10/2020 ielect a record be					0 Augus	Days			Activity			(All) Investigator (All) Activity Context	
10/2020 ielect a record be	clow to drill-dow Protocol §	n to a timeli Sponsor		vity Study Status	0 Augus Most Recent Monthly Activity		Institution	Investigator	Activity Context	A	ctivity Details	(All) Investigator (All)	
10/2020 Select a record bo					0 Augus	Days			Activity	A Study activity "C completed	ctivity Details	(All) Investigator (All) Activity Context	•
LO/2020 elect a record be tudy CS DEMO	Protocol 2 BVT17896	Sponsor Null Sponsor	Study Name CS DEMO Happyness	Study Status	0 Augus Most Recent Monthly Activity 24-Aug-2020	Days Active	Institution University of	Investigator Abbasi,	Activity Context Study Activity	A Study activity "C	ctivity Details	(All) Investigator (All) Activity Context (All)	
LO/2020 elect a record be tudy CS DEMO	Protocol 2 BVT17896	Sponsor Null	Study Name CS DEMO	Study Status	0 Augus Most Recent Monthly Activity 24-Aug-2020 01:55:26 PM 21-Jun-2021 08:05:56 PM 08:05:56 PM 08:05:56 PM	Deys Active 915 1,455	Institution University of Pennsylvania McSill University Oregon State	Investigator Abbasi, Soraya Bourbeau, Jean Bermudez,	Activity Context Study Activity Completed Email Created	A Study activity "C completed CDA_SUBMISSIO jet	ctivity Details omplete feasibility survey" N email from	(All) Investigator (All) Activity Context (All) Study Status	•
LO/2020 elect a record be tudy CS DEMO	Protocol 2 BVT17896	Sponsor Null Sponsor	Study Name CS DEMO Happyness	Study Status	0 August Most Recent Monthly Activity 24-Aug-2020 01:55:26 PM 21-Jun-2021 08:05:56 PM 06-Apr-2021 07:29:23 AM	Days Active 915	Institution University of Pennsylvania McGill University	Investigator Abbasi, Soraya Bourbeau, Jean	Activity Context Study Activity Completed	A Study activity "C completed CDA_SUBMISSIO	ctivity Details omplete feasibility survey" N email from	(All) Investigator (All) Activity Context (All) Study Status In setup	•
10/2020 Select a record be itudy CS DEMO	Protocol 2 BVT17896	Sponsor Null Sponsor	Study Name CS DEMO Happyness	Study Status	0 Augus Most Recent Monthly Activity 24-Aug-2020 01:55:26 PM 21-Jun-2021 08:05:56 PM 08:05:56 PM 08:05:56 PM	Deys Active 915 1,455	Institution University of Pennsylvania McSill University Oregon State	Investigator Abbasi, Soraya Bourbeau, Jean Bermudez,	Activity Context Study Activity Completed Email Created	A Study activity "C completed CDA_SUBMISSIO jet Site Accepted by Site Created	ctivity Details omolece feasibility survey" N email from M. Lanka, Pradeep	(All) Investigator (All) Activity Context (All) Study Status In setup Study Type	•
11/2020 Stilect a record be Study CS DEMO Happyness study	Protocol 2 BVT17896	Sponsor Null Sponsor	Study Name CS DEMO Happyness	Study Status	0 August Most Recent Monthly Activity 24-Aug-2020 01:55.26 PM 21-Jun-2021 09:05:56 PM 06-Apr-2021 07:29.23 AM 06-Apr-2021	Days Active 915 1,455 1,378	Institution University of Pennsylvania McGill University Oregon State University	Investigator Abbasi, Soraya Bourbeau, Jean Bermudez, Luiz Null	Activity Context Study Activity Completed Email Created Site Accepted	A Study activity "C completed CDA_SUBMISSIO jet Site Accepted by Site Created	ctivity Details omplete feasibility survey" N email from	(40) Immestigator (24) Activity Context (24) Study Status (in setup Study Type Feasility	•

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.

Ouration Details						o analy	/Ze
Study	Total Studies	Study Created On	First Activity Date	Latest Activity Date	Total Days Active	Study (Required)	γ,
WillStudyDemo	1	9/10/2020 9:37:11 AM	9/10/2020 11:51:53 AM	9/10/2020 2:20:17 PM	0	(AII)	
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	Unit of Measuremen	
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	Study	
						Contract	
						Oracle Select Term 2	Y 1
						Study	
						(Multiple values)	
						Created This Contrac	t Ye
						(AII)	
						Sponsor	
						(AII)	
						Protocol	
						(AII)	
						Investigator	
						(AII)	
						Institution	
						(AII)	
						Study Status	
						In setup	
						Study Type	
						Feasibility	

Recent Activity Timeline

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

Protocol



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

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

Recent Ac	tivity Ti	meline					an	alyze re	porting	suite	
											Study (Required)
Study	Protocol	Sponsor	Study Name	Study Status	Activity Date F	Days Active	Institution	Investigator	Activity Context	Activity Details	(Multiple values)
CS DEMO	BVT17896	Null	CS DEMO	In setup	24-Aug-2020 01-55-26 PM	915	University of Pennsylvania	Abbasi, Soraya	Study Activity Completed	Study activity "Complete feasibility survey" completed	27-Jun-2017 08-Jan-20
							e en la yriene		Survey Completed by.	Survey Completed by Site	Sponsor
					25-Jun-2020 01:08:59 AM	854	University of Pennsylvania	Abbasi, Soraya	Email Created	INVITATION_TO_PARTICIPATE email from ©uphs.u.	(All)
					25-Jun-2020 01-08-32 AM	854	University of Pennsylvania	Abbasi, Soraya	Site Moved to Short List	Site Moved to Short List	(All)
					07-May-2018 04-28-11 PM	75	University of Pennsylvania	Abbasi, Soraya	Site Created	Site Created	Activity Context (All)
					21-Feb-2018 04-03-41 AM	1	Null	Null	Study Created	Study Created	Investigator
Happyness study	DEMO	Sponsor	Happyness	In setup	14-Aug-2023 04-22-51 PM	2,239	New York University	Branski, Ryan	Email Created	CDA_APPROVAL email from	(AII)
		XYZ	study		14-Aug-2023 04/22/50 PM	2,239	New York University	Branski, Ryan	Email Created		Protocol (All)
					14-Aug-2023	2,239	New York	Branski, Ryan	CDA Approved	CDA Approved	Study Status
					04-22-49 PM		University		Select Lite File	Signed CDA example.pdf updated.	Study Type
									Study Activity Completed	Study activity "Sign and return CDA" completed	Feasibility
					14-Aug-2023 04-21-54 PM	2,239	New York University	Branski, Ryan	Email Created	CDA_SUBMISSION email from	

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 Reconcilia	tion Duration De	tails Recent Activity Timeline Activity Context Descriptions							
Activity Context D									
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.

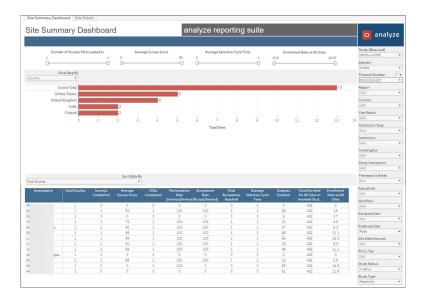
The lower section of the report presents results, by Principal Investigator, in a tabular format. The table includes the following aggregation metrics, any of which can be used to sort the table:

- 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



JILC	Details				analyze	reporting su	iite			🔤 ana	lyze
ort Dat	By Total Studies									Study (Required)	
	Investigator	Therapeutic Areas	Protocol Number	Trial Phase	Country	Institution	Selection Cycle	Subjec		S IE Sponsor	
								Enrolled		Oraito	
dia .		Null	SDECardioE2E	Null	India	Hospital of Delhi	Null	0	Null	Protocol Number	
		Null	SDECardioE2E	Null	United Kingdom	London Hospital	1	69	183	50 B	
Irc		Null	SDECardioE2E	Null	Poland	Warsaw General	Null	3	Null	Region	
or		Null	SDECardioE2E	Null	United Kingdom	Leeds City Hospital	1	21	213	(AI)	
te		Null	SDECardioE2E	Null	United States	Northeast Clinic	1	27	270	Country	
01		Nall	SDECardioE2E	Null	United Kingdom	Bristol Infirmary	0	48	195	(AII)	
A.		Null	SDECardioE2E	Null	United States	Community Clinic	1	66	252		
ti.		Null	SDECardioE2E	Null	United States	Boston General	1	15	183	Site Status	
ał.		Null	SDECardioE2E	Null	United States	University Hospital	1	48	195	(IIA)	
0	ram	Null	SDECardioE2E	Null	India	Chennal Clinic	Null	0	Null	Institution Type	
01		Null	SDECardioE2E	Null	United States	MA Medical Center	1	12	165	Null	
al		Null	SDECardioE2E	Null	Poland	Krakow University	Null	63	Null	Institution	
lo		Null	SDECardioE2E	Null	United Kingdom	Reading General	Null	51	Null	(AII)	
										(AII)	
										Study Indications	
										(AII) Therapeutic Areas Null	
										(All) Therapeutic Areas Null Specialties	
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										(All) Therapeutic Areas Null Specialities Null Workflow (All) Assigned User Null Preferred Site Palse	75
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										(Aii) Thropostic Areas Null Specialties Null Workflow (Aii) Assigned User Null Prefered Site Faise Data Sources Null PC OTIER Null	<u>∖</u> ,
										(Air) Threspectic Areas Null Specialities [Null Workflow (Air) Assigned User Null Preferred Site False Site Data Sources Null PI Co Tier Null Study Status	75

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 progri	ess report						o analy		
Invited to Particip	Accessed Select Lite 🔻	CDA Task Available 🔻	CDA Finalized •	Initial Interest in 💌	Completed Feasibi •	Final Acceptance •	Study (Required)		
							(Multiple values)		
1,128	630	594	127	127	112	98	Sponsor		
		004	121	121	112	50	(AII)		
vited to Participat	Accessed Select Lite	CDA Task Available	CDA Finalized	Initial Interest in	Completed	Final Acceptance	Region		
				Study	Feasibility Survey		(All)		
lect a KPI:		Slice Data By:			Total Cou		Country		
ompleted Feasibility !	unw	Country		• 10-	lotal Cou	D84	(Multiple values)		
		1 [10		0.04	Site Status		
			npleted Feasibility Sur	vey			(AII)		
							Institution Type		
80							(All)		
							Institution		
60							(All)		
							Investigator		
							(AII)		
40							Study Indications		
							(AII)		
- 03							Therapeutic Area		
							(AII)		
				_			Specialty		
United	States	Canada	France	Aust	ria	Germany	(AII)		
							Workflow		
				Completed Fea	sibility Survey		(AII)		
							Assigned User		
1 United	States			8	4		(AII)		
							Preferred Site		
2 Canada				2	2		(AII)		
3 France				-			Site Data Sources		
a France				-	3		(AII)		
4 Austria							PI CRO Tier		
				4			Noti		

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.

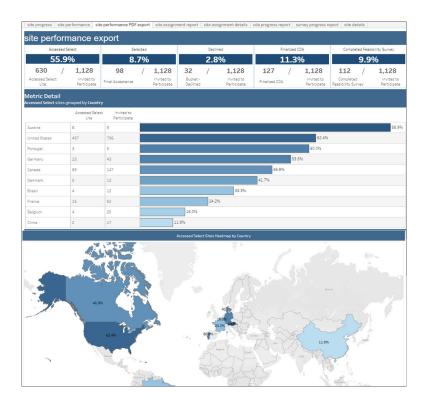


Accessed Select		•	Selected		•	Declined		•	Finalized	CDA	-	Completed Fei	sibility	/ Survey ·	Study (Requi	ired)
														200	(Multiple valu	ues)
55	.9%		8	.7%)	2	2.89	%		11.3	%	9	9.9%	%	Sponsor	
630	/ 1	128	98	1	1,128	32	1	1,128	127	/	1,128	112	/	1,128	(ILA)	
050	/ ',	120	30	/	1,120	02	1	1,120	121	/	1,120	Completed	/	1,120	Region	
cessed Select Lite		vited to rticipate	Final Acceptance		Invited to Participate	Bucket - Declined		Invited to Participate	Finalized	CDA	Invited to Participate	Feasibility		Invited to Participate	(AII)	
			Acceptance					Participate				Survey			Country (Multiple value	
ect a KPI: Acc	essed Selec	t		*	Slice Data By:	Country				• Tota	Count 2			D 1,127		285)
															Site Status	
								Select								
										Accessed !	alast last	ted to			Institution Ty (All)	ype
00.0%						88.9	16			Accessed : Lite		icipate			(AII)	
												2			Institution	
					53.5% 60.0%	62.4%		Austria	4		9			88.9%	(AII)	
50.0%			41.7%	6.9%	53.5%			United States		97	796			62.4%	Investigator	
			3.3%										_		(AII)	
22722		24.2%						Portugal			5			60.0%	Study Indicat	tions
11.89								Germany		3	43			53.5%	(AII)	
0.0%						70.0									Therapeutic A	Area
China	elgium	France	Brazil	Canada	Germany Portugal	United States Austria	111	Canada	1	9	147			46.9%	(AII)	
	8	Sale.	Der	3	Ger Por	D S R		Denmark			12		4	1.7%	Specialty	
													_		(AII)	
						cessed Select S									Workflow	
				0.20	1000	N.	1			1		See. as	5		(All)	
		-	S.C		C. C.										Assigned Use	
			2	- 4 - 1	A Star										Assigned Use	it.
	1.1				XAX											
	J	1 100	46.9	. (Preferred Sit	.e
	Š.	71	40.9		5 M			41 96								
	~		12		1	2		53.54							Site Data Sou	urces
					n - Se			00000			12	27			(AII)	
								5010%							DI CDO Tiar	

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.

0	nment repo				eporting suite		
							Study (Required) (Multiple values)
lice Data By: Country		Include Unass Ves	igned Sites:				
ountry		• 115					Sponsor (All)
Country	Sites Assigned	Sites Invited	Sites Active	Needs Assessment	CDA Pending Review	CDA Final Review	Region
Austria	0	8	8	2	0	0	(AII)
lelgium	2	25	25	0	1	1	Country
Brazil	0	11	11	0	0	0	(Multiple values)
		134	134		2		Site Status
lanada	1			5		0	(AII)
China	0	16	16	0	0	0	Institution Type
Denmark	0	10	10	0	1	0	(All)
rance	6	61	61	1	0	0	Institution
Sermany	7	42	42	1	1	0	(AII)
Portugal	0	4	4	0	0	0	Investigator
Russian Federation	1	0	0	0	0	0	(All)
Inited States	164	766	766	40	23	17	Study Indications
							(AII)
Sites Assigned	Sites Invited	Sites	A	City Marcin Law	nt 🔲 CDA Pending Review	CDA Final Review	Therapeutic Area
	Sides inviced	Jides	Accive	Dice Neeus Assessille	ic i Cox Pending Review		(AII)
Sites Assigned							
							Specialty
Austria							Specialty (AII)
Austria Belgium							
Austria Belgium Brazii							(All) Workflow
Austria Belgium							(All) Workflow (All)
Austria Belgium Brazil Canada							(All) Workflow
Austria Belgium Brazil Canada China							(All) Workflow (All) Assigned User (All)
Austria Belgium Brazil Canada China Denmark France Germany							(AII) Workflow (AII) Assigned User
Austria Belgium Brazil Canada China Denmark France							(All) Workflow (All) Assigned User (All) Preferred Site

Site Assignment Details

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

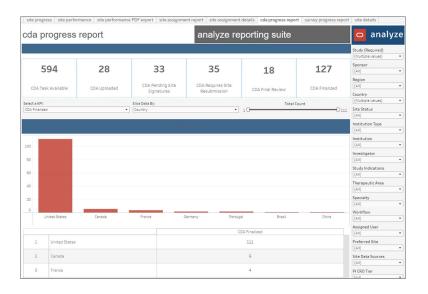
	sign		ent	deta	lis				ana	alyze i	repor	ting sui	ie			🗢 anal	y 2 C
tended for ex	port to	CSV p	urpose	sonly												Study (Required) (Multiple values)	
			_	Site As:	ignment Me	tric:	s	ilice Data By:			Include I	Jnassigned Sites				Sponsor	
Reset Drill	down Fill	er		Sites A	ssigned		•	Country			• Yes					(AII)	
					-											Region (All)	
nowing "sites.	Assigned	Claca	grouped	by country	r. These are s	stes that current	y nave a us	er assigned to th	em.							Country	
Data Slice	Assig	ned	Invest	inator	Country	Institution	Institutio	n Survey Resubmitted	Site Status	CDA Status	Survey	PI Phone Number	PIEmails		Specialty	(AII)	
Selgium	pre	1.	Aur		Belgium	Jessa Hospi	Not	No	Invited	Download.		Null	10	Xessa.		Site Status	
																(All)	
	QA	sel.	. Du;	ven	Belgium	Universitair.	Null	No	Invited	Download	N/A	Null	lie	aleuv.	Null	Institution Type (All)	
anada	Gu	r 8.	Sha	awn	Canada	The Ottawa.	Null	No	Selected	Download	Not Start.	613-737-8899	bc	2@9-	Pulmonary Diseas	Institution	
rance	ant		Dec	uno	France	bruno Univ	Null	No	Invited	Download.	N/A	Noll	br	om	Null	(AII)	
	ble	ab.	Dur	and a	France	Null	Null	No	Invited	Download.	N/A	Null	66		Pulmonary Diseas	Investigator	
																(AII)	
	Mi Sel	ser	Ber	Da	France	University	Noll	No	Invited	Download	N/A	Null	da	s@ch	Null	Study Indications	
			Cor	an F.,	France	Hospices Ci	Null	No	Backup	Download	Not Start.	Null	je	dier	Pulmonary Diseas	(AII)	
	ora	la.	Aut	hel	France	Assistance	Not	No	Invited	Download	Not Start	Noll	m	ch ap.	Nell	Therapeutic Area	
																Null	
	Prz		Cor	ain	France	Intergroupe Francophone		No	Backup	Download	Not Started	Null	cc		Anesthesiology	Specialty	
						de Cancerol.									Pulmonary Diseas		
iermany	M		RRI	Hun	Germany	University	Null	No	Invited	N/A	N/A	4 965+11	h	ed un	Pulmonary Diseas	Workflow	
	Sel	ser		-												Assigned Liser	
			Ewe		Germany	University	Null	No	Invited	N/A	N/A	-8684380	e.	swal	Pulmonary Diseas	(AII)	
	pre		Ank	an	Germany	Yale Univer	Null	No	Invited	Download	Not Start	Null	50	a.de	Null	Preferred Site	
	180		Ark	elen	Germany	Null	Null	No	Do not inv.	N/A	N/A	Null	N		Pulmonary Diseas	False	
			Bal		Germany	Null	Null	No	Do not inv.	M/A	N/A	Null	rc	2.00m	Null	Site Data Sources	
			udi	-	Germany	THUN .	(WUII	110	DO HOE INV.	19/14	influe.	1900	14	Acom	1990	Null	
	Ra	(a	Ank	an	Germany	Yale Univer	Null	No	Invited	Download	Not Start.	Noll	8.	a.de	Null	PI CRO Tier	

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

urve	y progress rep	ort	analyze reporting	g suite	🗢 analy	ze
					Study (Required)	
					(Multiple values)	•
	373	46	85	27	Sponsor (All)	
s	urvey Not Started	Survey In Progress	Survey Submitted	Survey Resubmitted	Region	
					(AII)	•
lect a KPI:		Slice Data By:		Total Count	Country	
arvey Subm	litted	Country	•] 10	C	(Multiple values)	•
					Site Status	
					(All)	•
0					Institution Type	
~					(AII)	•
					Institution	
					(AII)	,
					Investigator	
					(AII)	
0					Study Indications	
					(All)	
					Therapeutic Area	
0					(All)	
	United States	Canada	France Austria	Germany	Specialty	
					(All)	
			Survey Submitt	ed	Workflow	
1	United States		61		(All)	
2	Canada		19		Assigned User (All)	
3	France		3		Preferred Site (All)	
4	Austria		1		Site Data Sources	
					Null	
			1		PI CRO Tier	

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

ite details														Study (Required) (Nutple values)
Rudy Name	Investigator		Country	Institution	Institution Type	Survey Resubmitted	Site Status	CDA Status	Survey Status	PI Phone Number	PI Emails		Speciality	Sponsor (AII)
AS_DOCUUB3	Amic	123	United States	Tattooine	Null	No	Invited	Downloaded	N/A	Nutt	pam	1.0075	Null	Region
45_DOCULIB4	Arris	123	United States	Tattooine	Null	No	Invited	Downloaded	N/A	Nut	pam	Loom	Nut	(AII)
S_DOCUUB_2	Bade		United States	Yale University	Engineering	No	Invited	Downloaded	N/A	Null	nth		Null	Country
	dolla		United States	LOL School, Los Angeles	101	No	Invited	N/A	NA	Null	NO.		Net	(Multiple values)
	Inin	erie	United States	Troniabs	University	No	Invited	Downloaded	N/A		kyrie		immunology	Site Status
	Keps		United States	Karen School, Los Angeles	Karen	No	Invited	N/A	N/A	Null	Xare		Nati	Institution Type
	Kum		United States	Meena School, Los Angeles	Meena	No	Invited	N/A	N/A	Null	Mee		Null	(40)
	Tal, K		United States	Drama School, Los Angeles	Drama	No	Invited.	N/A	N/A	Null	kani		Nutl	Institution
	Pate.		United States	Unicom University	Engineering	No	Invited	N/A	N/A	Null	1018		Null	(40)
	Preb		United States	Ledy Gege, Los Angeles	Fashion	No	Invited	N/A	N/A	Null	suP	-	Nutt	Investigator (AII)
	Raj, (United States	Lady Gaga, Los Angeles	Fashion	No	Invited	Downloaded	N/A	Null	prak.		Nati	Study Indications
	Raj. 1		United States	Lady Gaga, Los Angeles	Fashion	No	Invited	N/A	N/A	Null	than		NUT	(AII)
	Raju		United States	Lady Gaga, Los Angeles	Fashion	No	Invited	A/A	N/A	Nut	2188		Null	Therapeutic Area
	Sekh		United States	Oxford, Los Angeles	Fashion	No	Invited	N/A	N/A	Nut	10.5		Nut	(40)
	Shar		United States	Oxford, Los Angeles	Fashion	No	Invited	N/A	N/A	Null	ravic .		Nati	Specialty (AII)
	Sing		United States	Oxford, Los Angeles	Fashion	No	Invited	N/A	N/A .	Null	alok		Null	Warkflow
	Sing		United States	BHU University	Engineering	No	Invited	N/A	N/A	Null	show		Nut	(A0)
	Stan		United States	Will's New Institution	University	No	Invited	Downloaded	N/A	1234567890	john		immunology	Assigned User
													encology	Preferred Site
	Teja,		United States	Loyola University	Fashion	No	Invited	Downloaded	N/A	Null	phar		Null	(All)
	Tend	-	United States	Vitte	University	No	Invited	N/A	14/04		8/24		immunology	Site Data Sources

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.

CDA Finalized	
4 67 United States site(s) CDA Finalized View Site Details	



11 Site Study Interest and Exclusion

Workbook synopsis

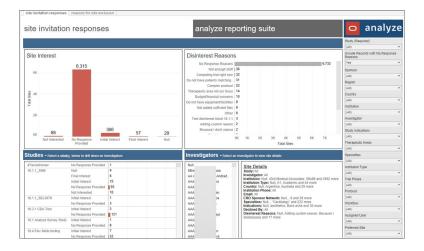
The Oracle Site Analyze Site Study Interest and Exclusion report, intended for Oracle Site Select customers, provides dashboard reports that visualize site invitation response state and reasons for site exclusion or study disinterest.

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.



easons for	site exclusior	ı		an	alyze re	porting suite			🗢 ar	nalyze
									Study (Required)	
									(AII)	
Site Exclusion E	Buckets			Exclusio	n Reasons				Include Records with	Empty Response
One Excitation 1	Duckoto								Yes	
1.069	9				ionse Reasons			466	Sponsor	
1000					il data manag	34			(AII)	
1000						20			Region	
					e sub-I and tri.				(AII)	
800					site personn.				Country	
Sites					e adequate fa.				(All)	
8 600	530			Does not have	e specialized 🔳	17			Institution	
Ta				Re	gulatory history	17			CAID	
400					ability to han 📕				Investigator	
					ected site Abo				CAID	
200					he new reason 5				Study Indications	
200		84			t like this study 4 ustom Reason 2				CAID	
			5						Therapeutic Areas	
Do not in	vite Final decline	Declined	Dropped	11	0	100 200	300 400	500	(AD)	
									Specialties	
Studies - Select a sti	udy; below to drill down on inves	tigators		Investig	ators - Select a	in investigator to view site deta			CAID	
18.1.1.3066	Declined 12			AA					Institution Type	
10.1.1_0000	Do not invite 13			Aar		Site Details Study: All			CAID	
	Final decline 3			Abt		Investigator: Null, 0Brown	un, Christingaa, AA Inves	tigator Lib	Trial Phase	
20.2 OCI testing	Do not invite 1			Abt		Andrade, Carlos and 5017 Institution: Null. 43rd Med		nd 2562 more	CAID	
	Final decline 3			Abr		Institution Type: Null, A1, Country: Null, Argentina, A			Protocol	
21.1_sindhu	Declined 1			Abc	n	Institution Phone: All	sustralia and 29 more		(AID	
AccountSP	Dropped 1			Abc	1	Email: All CRO Sponsor Network: 1	of and 20 mars		Workfow	
Acidity 12 Study	Declined 4			Abc		Specialties: Null., "Cardio	logy" and 232 more		(AID	
	Do not invite 1			Abc	ım	Indications: Null, aestheti Excluded By: All	cs, Back ache and 30 mc	re	6.4	
All Data	Final decline 1 Do not invite		447	Abr		Exclusion Reasons: All			Assigned User	
All Data analyze survey test	Do not invite Declined 3		44/	Abr	234				1	
analyze_survey_test	Decined 3			Abr	2.34				Preferred Site	
				11.1.1					(All)	



12 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.).

ior data	export p	urposes only													Study (Required) Happyness study •	Study Indications (AI)
Trist None	PLASTNER	Institution	Institution T.	Site Status	Worthow		From.	Subject	Communicati.	Sector	Opened AL	Select UTE Accessed AL	Completed WorkFlow Test(s)	Evelbore. 1	Sourcer	Study Status
9009/1655	NUM -	Onlidnen's Olinic	Circle, Outpath	kniited	4789/5			You have a m.		00-Mar-2023-07-29 AM	NUL	05-Dec 2029 12 29-PM	No		(48)	in setup
tudy, parage XVZ			ert facility					You have a mu		00-Mar-2023-07-09 AM	NUT	05-Dec 2029 12-29-PM	No.	No P		
ENO, Nancy									Site commun.	00-Mar-2023-07-29 AM	NUT	05-Dec-2029 12-29-PM	No	No P	Region	Study Type
									Site commun.	05-Mar-2023-07-29 AM	NUT	05-Dec 2029 12 29 PM	No		y NAmer .	Feesibility
						peppedpig1.			Site commun.	05-Mar-2023-07-29 AM	NUT	05-Dec-2029 12-29-PM	No.	No /		
						5/54	anannya.sut.	Continencypur.	Study interest	05-Mar-2023-07-29 AM	NUT	05-Dec-2029 12-29 PM	No	NUE P	Country United States	Communication Cate
ponsor XYZ	Burgerta	Mount Sinai Hospital and School of	Null	Invited	O Sign CD4.	paolo boffet.	moraia@g.	New researc.	Studyinvitat.	MA 84-R0 8505-WM-R0	Null	1948	No	No 7	United states	(AII)
E110, Paolo		Medicine (W)				thereined.	Interview.	New research	Studyinvitet.	09-Mar-2023-09-44 AM	NUI	19,41	34	765 2	Site Status	Ta
0077455	8	New York University	74,00	Invited.	O Sign CDA	xarfa.rijas1.	mmorate@g.	New research	Study-invited.	14-Aug-2028-04-05 PM	NUT	14-Rup 2023 04-06 PM	Yes	760 7		(41)
udy. Ioneor XXZ								Your CDA red.	COA pending .	14-Aug-2025-04-20 PM	NUR	14-Aug-2023 04-06 PM	Yes	No. 7		
EIAO, Ryan							comichael74.	Your CDA to a	CDA approvial	14 Aug 2023 04 22 PM	Null	14-Aug 2023 04-06 PM	Yes	110 7	Institution Type	From
						mmorale@p.	ryan branski.	A CDA	CD4	14 Aug 2023 04 07 PM	NUT	14-Aug-2023 04-06 PM	Ves	No /	9 (AI) •	(44)
								submission r.	submission	14-Aug-2023-04-21 PM	NUT	14-Rup 2023 04-06 PM	Ves	No P		
						199855-5744	mmorala@g.	New research	Study invitat.	54-kup-2020 04-05 PM	NUT	14-Rup 2023 04-06 PM	Vas	No: P	Institution	Email Failed
								Your CDA HED.	COA pending .	14-Aug-2022-04-20 PM	NUT	14-Aug-2023 04:06 PM	Yes	No P	 (AI) 	(AII)
							camichael?4.	Your CDA is a	CDA approval	14-Aug-2022 04-22 PM	NUT	14-Aug-2023 04:06 PM	794	No P		
						ryan branski.	montabs.	New researc.	Study invited.	14-Aug-2023 04-05 PM	NUE	14-8up-2023 04:06 PM	Yes	149 2	Investigator	Sent At
								Your COA Hell	COA pending .	14-4-9-2023 04-20 PM	NUT	14-8-9 2023 04-06 PM	Yes	160 7	(41)	29-Feb-23 22-Fe
							camichael74.	Your CDA is a	COA approval	14-Aug-2023-04-22 PM	Nut	14-Aug-2023-04-06-PM	Ves	No. 7	Preferred Site	
						thomas harr.	morando.	New research	Study-mytet.	14-4up-2023-04-05 PM	NUM	14-Aug-2023 04-06 PM	Ves	149 7	Ta .	
								Your CDA reg.	COA pending .	14 Aug 2023 04 20 PM	NUT	14-Aug 2023 04-06 PM	Ven	No P		
							camichael74	Your CDA is a	CDA aconovial	14-Aug-2020 04-22 PM	Nut	14-Aug-2023 04-06 PM	Yes	No 7	PICRO Tier	
															24	

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.

																Study (Required) Happyness study	Study Indications (All)
Site User Email		State Name	Sponsor	Protocol No.	Plant	Name	Pilet	Name Institution	Institution Type	Ste Status	Select UTT Accessed At	Completed Workflow Task(u)	Inel love	freet Drose		Sponsor	Study Status
		Happyness study	\$00160r XVZ	061/0	N 1					invited.	05-Dec-2009 32-29 PM	59	Null	N648	,800		in setup
									Feolity				59	510	A00		
		Happyness study	Sponsor XVZ	OBMO .	14 1			Onliner's Clinic	Cirk(Dutgetient	invited	05-Dec-2019 12-23-PM	759	Null	Not	A00	Region	Study Type
									Peolity				112	No	A01	Namer +	Peasibility
	Loom	Happyness study	Sponsor 10/2	08140	2		Dr .	New York University	7928	invited.	34-Aug 2023 04-06 PM	Yes	50	No	A01		
	1404	Heppymene study	Septem XV2	05140	90.0			 Nount Sinal Pospital and School of 7 	 Not 	Invited	No.4	79	59	No	AN	Country	Communication Cate
		Happyment study	Sponsor WZ	06140	10 1					invited.	05-Dec-2009 12 29 PM	No.	Null.	Nut	A10	United States ·	(81)
									Facility				50	No	Ato	Site Status	10
	4	Happyness study	Sponsor W/2	08140				New York University	764	invited	54-Aug-2023 04:06 PM	765	10	50	A00		
	610	Happyness study	Sponsor XV2	0840				Tony York University	Not 1	invited	34-8up-2023 04 06 Pt /	Tes	10	10	App.	11/080	(80)
2	-	Happyness study	Sponsor XVZ		91 .			 Mount line Hospital and School of I 	 Not 	invited	Null	50	59	No	A00	Institution Syste	Fram
N.	set con	Happyness study	Sponsor 1072	061/0				New York University	76,48	invited	34-Aug-2023 54-06 PM	Yes	50	No	Apr.		(81)
																Institution (AI) • Investigator (AI) • Preferred Site No • PrCRO Ther Null •	Email Failed [kii] Sent At 19-Fac-23 22-Fe O

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.

Ques	tio	n Analysis	analyze repo	orting suite				o a	nalyze
								Study (Require	
Crit	ical R		1 Sites 6	Tier 2 Sites 9		Tier 3 5		(Multiple values Survey Submiss 26-Jul-2017	
								Sponsor (All)	
Study Name	=	Question	Response Answer	Response Point	ts			Study Phase	
Cookies	1	Are you currently engaged in any competin	Yes	1		5		(AII)	•
	2	Do your facilities include the equipment (as			4			Region	
		described in the protocol) to complete this	the name every ching required.	2	1			(All)	
	3	IS the Pet scanner available for clinical trial	No	3	1			Country	
		use	Yes	3	4			(AII)	
	4	How many subjects can you recruit?	26-100	2	4			Therapeutic An	
	5	How many years of experience do you have?		3				(All)	•
appyness tudy	1	How many doctors do you have on staff	1-10	0		5			
tudy			11-50	0	_		20	Specialties (All)	
			51+	0					•
	2	There is an x-ray machine on site	False	0		8		Study Indicatio	ns
	_		True	10	4		23	(AII)	-
	3	What is your hospital specialty	Cancer	5	4			Survey Title	
			Children's Health Diabetes	5	1	10		(All)	
				0	2			Bucket State	
			Dietary Obesity	0	2			(AII)	
			Psychology	5	1			Question Cated	
			Psychology	0	0	10	20	(All)	iory .
					Ŭ			(040)	
					C	ount Distinct	Responses	Critical Respon	se Selected
		itor to view site detail information						(AII)	
elect an inv	estigi	tor to view site detail information						Investigator	
Abc		1 Study Name: Co	okies, Happyness study, Joyful					(AII)	
Abr		34 PI Name: Ab		berto	and 37 more			Institution	
			e: =University of Wisconsin, Mac				and	(All)	
Ada		Women's Hospi						Preferred Site	
Ada		Institution Type	et All					False	
Adl		Country: All							
Agr		PI Phone: All PI Email Addres	10 AU					Assigned User	
hr Ahr		Specialties: Nul						(AII)	
		operation						Site Contributio	ng Data Sources
Alb								Null	
4lk	,	, ianie						CRO/Sponsor In	vestigator Tier
								Null	
								Study Status	
								(All)	
								1.5.1	
								Study Type	
								(AII)	,

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 S	ite Info	ormation	ar	nalyze re	eporting	g si	uite							o ana	lyze
														Study (Required)	
														(Multiple values)	
tudy Name	Sponsor	CRO Sponsor Network	Study Number	Study Interest	Country	Assig	ied U.,	Protocol Name	Site Disinterest Reason	Preferred Site	PI Name		PIE	Survey Submission D	
ookies	Sponsor A-	Null	32	Null	United States	Null		Null	Null	False	Ab	irryl2	dab		22-Feb-20
	123										Ar	34,	atu		
											Ar		pral	Sponsor	
											AL		aud	(A))	
				True	United States	Null		Null	Null	False	Ac	>	arol	Study Phase	
											An	her	carr	(AII)	
appyness study	Sponsor	Null	20	Null	United States	Null		Null	Null	False	Bie		\$001	Region	
	XYZ										Bit		den	(AJI)	
											Ch	nam	b.ch	Country	
											Sir		ada	(AII)	
											Ya		jy1€	Therapeutic Area	
											Zu	lard	rzun	(All)	
				True	Canada	Null		Null	Null	False	Co		COX	Specialties	
					France	Null		Null	Null	False	Be		berg	(AII)	
											Mi	n	mas	Study Indications	8
											Pic	he	cpis	(All)	
					United States	Null		Null	Null	False	Ac	pher	chri	Survey Title	
											All	Steph.	ste;	(All)	
											As	muel	asir	Bucket State	
											Ba		bae	(AII)	
											Be		pra	Question Category	
											Ba		Jasc	(AII)	
											Br		dbr-	Critical Response Sel	ected
											Ch		ech	(AII)	
											Ku		mał	Investigator	
											Me		rme	(AJI)	
											St		ster	Institution	
											St		arth	(AII)	
											St		bst	Preferred Site	
											W		swc	False Assigned User	
									Therapeutic area not o		All	othy	teal		
						Mi	el QA	Null	Null	False	Bh	der	pra.	(All)	
													sbh	Site Contributing Dat	ta Sourc
							el User	Null	Null	False	Ba	10000			
						26	user				Fa		mar	CRO/Sponsor Investig	
											Pa		luce	Null	
											Wi		wig	Study Status	
						pre lar		Noll	Noll	False	Ag		889	(All)	
						And in case	-						carl	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	Resp	onse	es				analyze rep	orting s	uite					🗢 analyz	e
														Study (Required)	
								Survey Provider	6					Happyness study	
tudy Name	Sponsor	Country	Tier	Raw Score	PI Name		Institution	Response ID	Survey Submission Date	Category	Category Score	=	Question	Survey Submission Date	
lappyness	Sponsor	Canada		25	Cox	d	Saint Josephs Healthcare	Null	05-Dec-2019	Null	Null		How willing are you to partic	26-Jul-2017 22-Feb-2	
tudy	XYZ						Hamilton		04:25:35 AM					Sponsor	
										CR1	0	1	How many doctors do you ha	Sponsor XYZ	
										CR2	5	3	What is your hospital special	Study Phase	
										CR3	20	2	There is an x-ray machine on	Phase II	
										Chu	2.0			Region	
												4	Which medications does your	(AII)	
													currently?	Country	
														(All)	
														Therapeutic Area	
		France	3	15	Ma	Julie	h Chu Toulouse	Null	01-Aug-2017	CR1	0	1	How many doctors do you ha	(AII)	
									01/51/48 PM	CR2	5			Specialties	
										CR2	5	3	What is your hospital special	(All)	
										CR3	10	2	There is an x-ray machine on	Study Indications	
					Pis		University Hospital,	Null	01-Aug-2017	CR1	0	1	How many doctors do you ha	(AII)	
					Chr		Grenoble		01-53-14 PM					Survey Title	
										CR2	5	3	What is your hospital special	First Survey	
										CR3	10	2	There is an x-ray machine on	Bucket State	
			4	22			201 0 100 2 1				122		There is an x-ray machine on	(All)	
			-4	10	Ber	trick	Universite Victor Segalen .	. Null	01-Aug-2017 01.	CR3	10	2	There is an x-ray machine on	Question Category	
			1	30	Alb		University of California,	Null	20-May-2019	Null	Null	S	How willing are you to partic	(AII)	
		States			Tim		Davis		12/29/25 AM	CR1	0	1	How many doctors do you ha	Critical Response Selected	
												*		(All)	
										CR2	5	3	What is your hospital special	Investigator	
										CR3	25	2	There is an x-ray machine on	(All)	
														Institution	
												4	Which medications does your currently?	(All)	
														Preferred Site	
														False	
														Assigned User	
														(AII)	
					Asir	n.	Mayo Clinic	Null	10-Mar-2020	Null	Null		How willing are you to partic	Site Contributing Data Source	1
					San	n,	Mayo clinic	NUM	04:17:34 PM	NUI	NUIL	5	How writing are you to partic	Null	
										CR1	0	1	How many doctors do you ha	CR0/Sponsor Investigator Tier	
										CR2	5	3	What is your hospital special	Null	
												3	minacia posi nospital special	Study Status	
										CR3	25	2	There is an x-ray machine on	In setup	
												4	Which medications does your	Study Type	
													numenth/2	Peasibility	

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).

xport R	esponsi	es												
itudy Name	Sponsor	Country	Tier	Raw Score	PiName	Institution	Survey Provider Response ID	Survey Submission Date	Category	Category Score		Question	Response Answer	Critical Question
feppyness itudy	Sponsor XYZ	Canada	2	25	Cor	Saint Josephs Healthcare Hamilton	Null	05-Dec-2019 04:25:35 AM	Nut	Nuti	5	How willing are you to participate in this study?	81	Nut
EUGY	A12					manuton		0425/35 AM	CR1	0	1	How many doctors do you have on staff	11-50	False
									CR2	5	3	What is your hospital speciality	Children's Health	False
									CR3	20	2	There is an x-ray machine on site	True	True
											4	Which medications does your hospital have currently?	Ambien	Palse
													Lyrica	False
													Synthroid	False
		France	3	15	Ma	dien ChuToulouse	Null	01-Aug-2017 01-51-48 PM	CR1	0	1	How many doctors do you have on staff	1-10	False
								01-01-40 PM	CR2	5	3	What is your hospital speciality	Senior Citizens	False
									CR3	10	2	There is an x-ray machine on site	True	True
					Pis	University Hospital, Granoble	Null	01-Aug-2017 01-53 14 PM	CR1	0	1	How many doctors do you have on staff	11-50	False
					CH.	0161034			CR2	5	3	What is your hospital speciality	Children's Health	False
									CR3	10	2	There is an x-ray machine on site	True	True
			4	20	Ber	ick Universite Victor Segaler	Null	01-Aug-2017 01	CR3	10	2	There is an x-ray machine on site	True	True
		United States	1	30	Alt Tin	University of California, Davis	Null	20-May-2019 12/29/25 AM	Null	Null	5	How willing are you to participate in this study?	91	Nyti
		718085				5000		1000000	CR1	0	1	How many doctors do you have on staff	51+	False
									002	5		What is your hospital specialty	Children's Health	False

14 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.

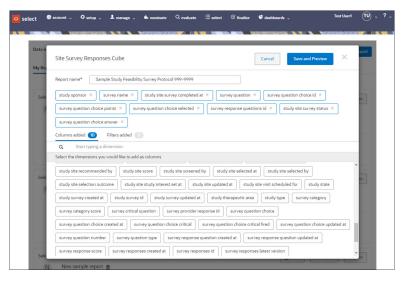


Data extract cubes

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.

			loc har	e exported this page of the report	e 📩 Export	Edit Report
Sample Study Feasibil	ity Survey Protocol 999-9999 🝵 Tota	al records: 3191			Previous	1 Next
Study Survey Id	Survey Question Choice Id	Study Sponsor	Survey Name	Survey Question Choice Answe	Survey Question	Survey Que
091ad8d6-d631-40	0039b685-6573-4868-bd11-f776ae	Tes123	Regular site		Which Special Cha	0
091ad8d6-d631-40	034809d2-ec79-42c8-a186-698a0	Tes123	Regular site	Yes	! # <b< td=""><td></td></b<>	
091ad8d6-d631-40	05cdda32-7c45-4969-b336-48086	Tes123	Regular site	Yes	! # <b< td=""><td></td></b<>	
091ad8d6-d631-40	073a6173-b4f8-41cf-a65a-611354bd	Tes123	Regular site		!, #, \$, %, `, (,), *, +,	10
091ad8d6-d631-40	0a8de118-ae41-4675-8330-0994181	Tes123	Regular site	Yes	! # <b< td=""><td></td></b<>	
091ad8d6-d631-40	0d832400-594c-46ca-a6d2-3c1c5a	Tes123	Regular site	Yes	! # <b< td=""><td></td></b<>	
091ad8d6-d631-40	0f7978a2-350e-4399-9968-a31606	Tes123	Regular site	yes	! # <b< td=""><td></td></b<>	
091ad8d6-d631-40	10023ef4-ece8-46a3-8417-0030f4	Tes123	Regular site	No	! # <b< td=""><td></td></b<>	
091ad8d6-d631-40	1242364e-6fa0-4422-9aa4-0ca9ab	Tes123	Regular site	Yes	! # <b< td=""><td></td></b<>	
091ad8d6-d631-40	13ef03d8-ecd5-4e3f-8460-11dbaa8	Tes123	Regular site	No	! # <b< td=""><td></td></b<>	
091ad8d6-d631-40	150aa0b3-cdcd-4590-83c4-86a7a	Tes123	Regular site	Yes	! # <b< td=""><td></td></b<>	
091ad8d6-d631-40	1c02fb51-afd3-4118-bb8d-2e4308b	Tes123	Regular site		Which Special Cha	10
091ad8d6-d631-40	1cba525e-88ed-4331-a164-3a2f24d	Tes123	Regular site	No	! # <b< td=""><td></td></b<>	
091ad8d6-d631-40	1f491d86-2eb6-4fab-afcc-13a4af73	Tes123	Regular site	Yes	! # <b< td=""><td></td></b<>	
091ad8d6-d631-40	20ff0ab7-27d5-4102-8d04-f4bd67c	Tes123	Regular site		Which Special Cha	0
091ad8d6-d631-40	22921c48-cda8-42f0-9f51-d79d3dc	Tes123	Regular site	yes	! # <b< td=""><td></td></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

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My	Reports	Shared I	Reports											
s		udy Site Data								C Share	Edit report	Preview		
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		colonini	agree to	confidentiality on	country nan	ne bucket	institution of	ountry ins	titution	pi first name	pi last name	J	. 1	
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s	elect - Sit	te Survey Res	ponses Cube	e.						C Share	Edit report	Preview		
	Н		ss survey re	port 💼										
		Column	study na	me survey nar	me country r	name pi last	name pi f	irst name	vorkflow na	me				

Provided you are the report author, you can Share (^{CC}) 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 (\overline{m}) .
- 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 (^C).



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**.