Oracle Life Sciences Site Analyze Cloud Service

Using Oracle Site Analyze: For Oracle Site Select Users

Release 24.2
G17438-02
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Contents

Preface

This preface contains the following sections:

- Documentation accessibility
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- 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/life-sciences/support/ or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

1 Accessing and Navigating reports

Learn about getting around in reports and how to filter and export dashboards and worksheets.

Report access

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.
When you have the required permissions to access Oracle Site Analyze reports, you'll navigate to the reports from within Oracle Site Select. In the top navigation bar, click Dashboards, then click "Analyze reports."

Please note: Access to reports in Oracle Analytics Cloud requires Oracle Identity Cloud Service (IDCS) authentication. This applies to Oracle Site Analyze release 24.2.2 and all subsequent releases.

Workbook navigation

Each report workbook includes one or more worksheet tabs, beginning at the lower left of your screen. Click any tab to navigate to the associated dashboard or worksheet.

Filters

You'll find most report data filters in a row along the top of each dashboard or worksheet.

There are three types:

1. **List**: A list filter provides a simple list of values to choose from and lets you see which values are selected and which aren't. Using a list filter, you can optionally exclude selected values, and you'll also have the option to include null values in your report if preferred.
2. **Date**: A date range filter uses calendar controls to adjust time or date selections to limit data to a specific period of time. You'll select a single range of dates. Alternatively, you can use a date range filter to exclude dates within the specified range.
3. **Range**: A range filter works for contiguous numeric data. You'll can specify Start, End, and By properties to limit the range of data included in the report.

Some reports have filters embedded in the report itself. Where this applies, the filter will control only the accompanying dashboard visualization, instead of controlling to the entire worksheet.

Explore and interact with reports

The links below provide instructions for working with Oracle Site Analyze reports built in Oracle Analytics Cloud:

- Navigate to reports from Oracle Site Select
  Open the reports Home page and browse to the report you want to view.
- Navigate the reports Home page
  The Home page is a dashboard where you can access your reports. You can organize the display to your preferred view.

- Navigate reports in Catalog view
  Catalog view organizes your reports in a folder structure.
- Favorite a report
  Add your frequently used reports to the Favorites section for quick access.
- Apply a list filter to report data
  The most common filter is List type. List filters allow you to choose one or more values from a list to include or exclude from the dashboard or worksheet.
- Apply a date filter to report data
  When available, date filters let you filter a dashboard or worksheet by a date or date range. You'll choose a specific date or start and end date range values.
- Apply a range filter to report data
  You can expand or reduce the reported data if the dashboard or worksheet includes a Range filter. You'll specify start and end range values as well as optional attributes.
- Undo or Redo edits
  When viewing a workbook, it's easy to undo your last action and then redo it if you change your mind.
- Export report to a file
  You can export a workbook's dashboards and worksheets to Microsoft PowerPoint, Adobe Acrobat, or an image file.
- Maximize and export a visualization
  You can expand some dashboard visualizations and optionally export the image or data.
- Print report dashboards and worksheets
  You can print your workbook's dashboards and worksheets.
- Share a report
  Share a link to the report with others in your organization if preferred. You can share the report or individual worksheets in the original or current (filtered) state.

Navigate to reports from Oracle Site Select

Open the reports Home page and browse to the report you want to view.

- From within Oracle Site Select, click **Dashboards** in the top menu, and click **Analyze reports** to view the reports Home dashboard in a new tab.

Navigate the reports Home page

The Home page is a dashboard where you can access your reports. You can organize the display to your preferred view.

1. In the default Home view, click **Workbooks and Reports**, and hover over any report tile to see a brief report description.
2. At the far right, click or to adjust the view to tiles or a list.
3. In either view, you can optionally:
   - **Search** for a specific report
   - **Sort By** (choose from **Modified** (default), **Name**, **Owner**, **Type**, or **Reverse Order**)
   - Favorite a report by clicking its star. The report will be added to the home page's **Favorite Workbooks** view for quick access. Favorited reports have a gold star.

- Double-click any report tile or row to open the report.

Navigate reports in Catalog view

Catalog view organizes your reports in a folder structure.

1. Click at the upper left and select **Catalog**, then click **Shared Folders**.
2. Click the folder with the reports you want to view.
3. At the far right, click or to adjust the view to tiles or a list.
4. In either view, you can optionally:
   - **Search** for a specific report.
   - **Sort By** (choose from **Modified** (default), **Name**, **Owner**, **Type**, or **Reverse Order**).
   - Favorite a report by clicking its star. The report will be added to the home page's **Favorite Workbooks** view for quick access. Favorited reports have a gold star.
   - Double-click any report tile or row to open the report.

Favorite a report

Add your frequently used reports to the Favorites section for quick access.

1. On the reports Home page or in Catalog view, click a report's star to favorite it.
2. The report will be added to the **Favorites** section on the Home page, and the will be gold.
3. If preferred, click again to unfavorite the report and remove it from the Favorites section.

Apply a list filter to report data

The most common filter is List type. List filters allow you to choose one or more values from a list to include or exclude from the dashboard or worksheet.

1. With the **List** button selected at the top left of the filter modal, click on one or more values in the left column (which represents all available values) to add to the **Selections** column on the right.
2. Optionally, at the bottom of the left column, click **Add** to select all items and move them in bulk to the Selections column.
3. Optionally, use the **Search** field above the left column to find a specific item in the list. To the right of the Search field, optionally click [A] to open the search attributes menu and specify the search type (i.e., Contains, Begins, Ends, Pattern Match, or Case Sensitive).
4. Using the options above the **Selected** column, you can check the check boxes to **Exclude** the values in the Selected column and/or include **Nulls** in the report. To remove the values in the Selected column, click **Clear** at the bottom.

Apply a date filter to report data

When available, date filters let you filter a dashboard or worksheet by a date or date range. You'll choose a specific date or start and end date range values.

1. This filter defaults to **Date Range**. At the lower left of the filter panel, click the drop-down to specify a **Range** of dates, a single **Start at** date, a single **End at** date, or a single **Equal** to date.

   Click the **List** button at the top of the filter panel to see all available values. Ensure the date values you enter when using the Date Range filter fall within the available values.

2. Optionally, click the **List** button, choose one or more individual date values, and move them to the Selections column. You can also click **Add** to select all values in the left column and move them to the Selections column simultaneously.

Apply a range filter to report data

You can expand or reduce the reported data if the dashboard or worksheet includes a Range filter. You'll specify start and end range values as well as optional attributes.

1. This filter type defaults to **Range**. You can manually enter range values for Start and End at the panel's lower left. To the right of **By**, click **None** to open a list of optional attributes to apply to the filter.

   At the filter's right, the Value Distribution visualization updates.

2. Optionally, to the right of **Start** and **End**, click the **Min** and/or **Max** buttons to set the filter to the actual minimum or maximum values

Undo or Redo edits

When viewing a workbook, it's easy to undo your last action and then redo it if you change your mind.

1. In the toolbar at the top of the report, click one or more times. The undo button will be disabled (gray) when there are no other actions to undo.

2. When you've clicked Undo at least once, the button will be enabled. Click to redo the action.

Undo and Redo actions are available to you in your current session, and they revert to unused when you navigate away from the report.

Export report to a file

You can export a workbook's dashboards and worksheets to Microsoft PowerPoint, Adobe Acrobat, or an image file.

1. In the toolbar at the top of the report, click , and in the Export panel, click . Alternatively, you can right-click anywhere on the worksheet and choose **Export** and **File**.

2. In the Export modal, at **Name**, you can optionally modify the default report name.

3. At **Format**, select the file format you want to export to. You can choose **Powerpoint (pptx)**, **Acrobat (pdf)**, **Image (pdf)**, **Data (csv)**, or **Excel (xlsx)**. Note that export options available to you depend upon the worksheet or visualization type and the data. For instance, most visualizations don't provide Data or Excel export options.

4. At **Include**, the export defaults to include all worksheets (i.e., Entire Dashboard) for Powerpoint and Acrobat formats. However, Image (pdf) export will export only the current worksheet.

5. Optionally, turn on the **Include Filters** switch. You can also turn on the **Include Title** switch for Powerpoint or Acrobat formats only. Switches turn green when enabled.
6. Use the **Size** drop-down (Powerpoint or Acrobat formats), to specify a preferred page size.
7. For Powerpoint or Acrobat formats only, you can specify a page orientation. Choose Landscape or Portrait using the **Orientation** drop-down.
8. Click **Save**.

Maximize and export a visualization

You can expand some dashboard visualizations and optionally export the image or data.

1. When viewing a visualization, look to the upper right and click the to enlarge the visualization. Note that this option is not currently available for all charts.
2. Click and choose Export and File.
3. In the File modal, at **Name**, you can optionally modify the default file name.
4. At Format, select the file format you want to export to (e.g., **Powerpoint (pptx)**, **Acrobat (pdf)**, **Image (pdf)**, or **Data (csv)**). Your selection will modify the remaining available options.
5. At **Include**, the file export defaults to include the expanded visualization (Active Visual). Change the file content options by selecting a different export format if preferred.
6. If available, you can optionally turn on the **Include Filters** switch. You can also turn on the **Include Title** switch. Switches turn green when enabled.
7. If available, use the **Size** drop-down (Powerpoint or Acrobat formats) to specify a preferred page size.
8. For Powerpoint or Acrobat formats only, you can also specify a page orientation. Choose Landscape or Portrait using the **Orientation** drop-down.
9. Click **Save**.

Print report dashboards and worksheets

You can print your workbook's dashboards and worksheets.

1. In the toolbar at the top of the report, click , and in the export panel, click . Alternatively, right-click anywhere on the worksheet and choose **Export** and **Print**.
2. In the Print modal, at **Name**, you can optionally modify the default report name.
3. At **Include**, choose **Active Visual**, **Entire Dashboard**, or **All Dashboards**.
4. You can also optionally click **Include Filters**, and **Include Title** to include them in the printed output.
5. At **Size**, use the **Custom** setting (default size) to print using the height and width displayed on your screen and optionally select **Scale Proportionally**. Or, you can choose a different size option (e.g., US Letter, A4, Legal, etc.). You can also specify **Width** and **Height** values if preferred.
6. At **Orientation**, choose **Landscape** or **Portrait**.
7. Click **Print**.

NOTE: When you print, the pages are re-rendered based on your selected size and orientation. So, if you're printing a table, your printed copy might not contain all of the table's rows and columns in your dashboard or worksheet.

Share a report

Share a link to the report with others in your organization if preferred. You can share the report or individual worksheets in the original or current (filtered) state.

1. Click to open the Export modal.
2. Use the **Start on** drop-down to choose the canvas (dashboard or worksheet) you want the link to point to.
3. Use the **Apply state** drop-down to select **Original state** or **Current state**.
4. Click **Copy Link**, or optionally copy and share the QR code shown in the Export modal

2
Account Metrics

Workbook synopsis

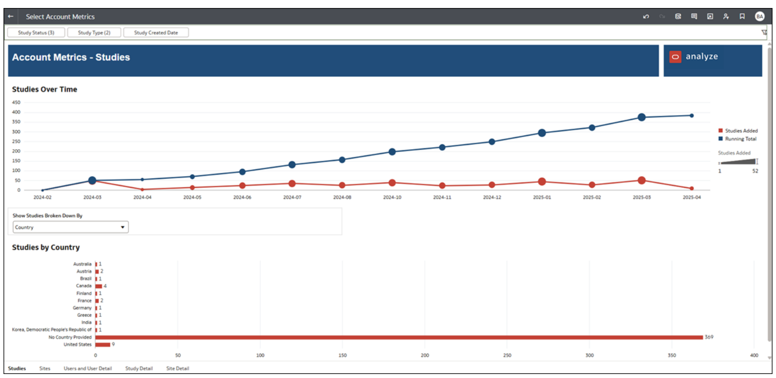
The Account Metrics report workbook, which is intended for Oracle Site Select customers, includes dashboard views of studies, sites, and Oracle Site Select users as well as detailed cross-tab sheets of each.

Dashboards and sheets

Account Metrics - Studies

The studies dashboard shows 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.

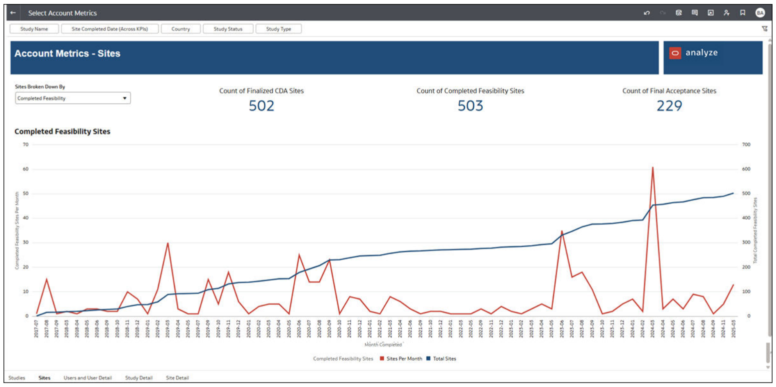
Use the worksheet filters (Study Status, Study Type, and Study Created Date), along the top of the dashboard, to include/exclude data from the dashboard view. Use the "Show Studies Broken Down By" filter, at the center of the worksheet, to change the dimension (country, sponsor, or phase) displayed in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



Account Metrics - Sites

The sites dashboard shows you trends in sites that have completed important milestones in Oracle Site Select over time. Top level KPIs show total number of study sites that have finalized CDAs, total number of study sites that have completed feasibility, 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.

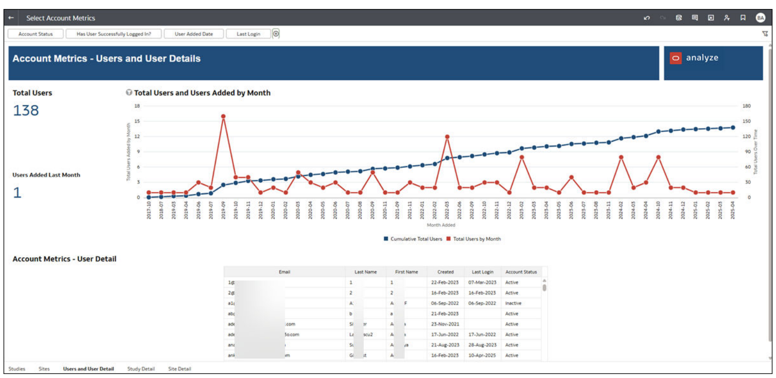
Use the filter options along the top of the worksheet to limit the scope (e.g., choose a specific Study, Site Completed Date, Country, Status, or Type.) and tailor the available data to your preferred view.



Account Metrics - Users and Users Detail

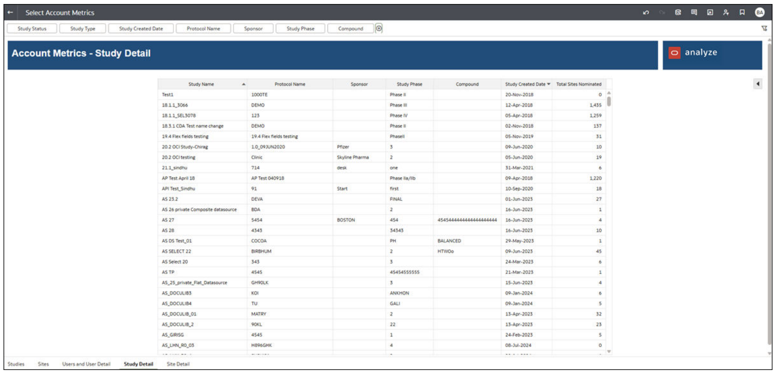
This dashboard shows top level KPIs for total Oracle Site Select users added and users added last month. The Total Users and Users Added Running Total visualization shows the cumulative users over time and users added for each month. Hover over any point in the line graphs to see additional details. The "Status" filter at the top of the worksheet makes it easy to toggle between including/excluding inactive users in the aggregations.

The users detail table at the bottom of the worksheet shows details based on the filters you specify from the options at the top of the worksheet. For example, filter by date range for Oracle Site Select user account creation and last login. You can also specify if you want to include users who have never logged in and/or view the data by active, inactive, or all users.



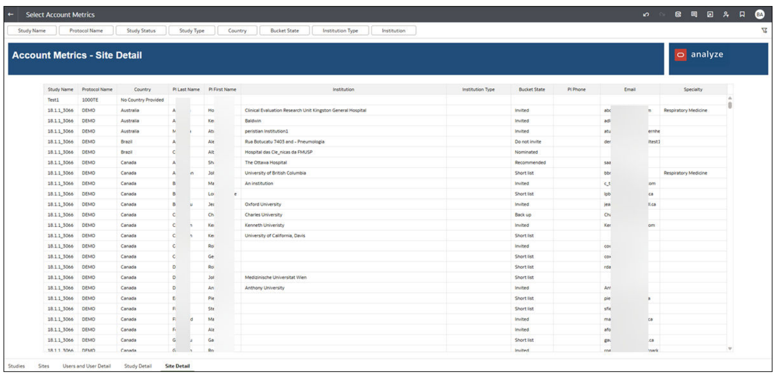
Account Metrics - Study Detail

The study detail worksheet lets you filter details by study status, study creation date, protocol name, sponsor, study phase, and/or compound. You also have the ability to drill directly to site data by clicking on any study listed in the "Study Name" column.



Account Metrics - Site Detail

The sites detail worksheet lets you filter details by study, country, bucket state (e.g., do not invite, invited, short list, etc.), and more.



3
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

Use the filter options along the top of the worksheet to limit the scope (e.g., Study, Min/Max Cycle, Sponsor, Region, etc.) and tailor the available data to your preferred view.

The Key Cycle Times dashboard allows you to configure your cycle time parameters of interest for the filtered data (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.

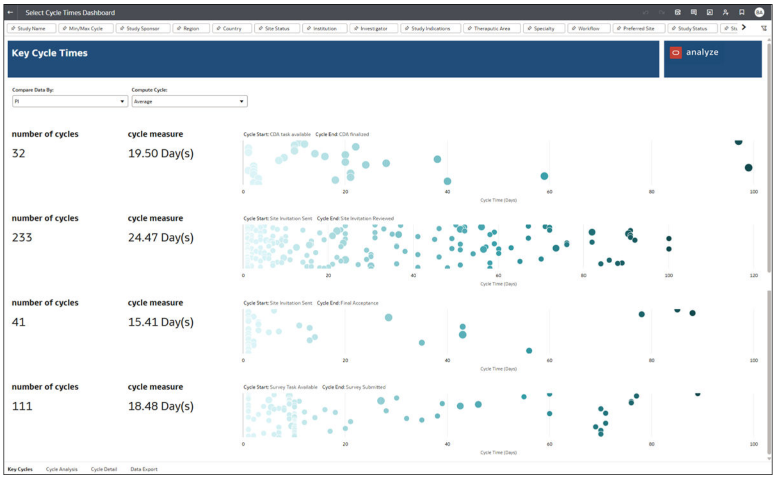
Once you've selected parameters, the Key Cycle Times dashboard displays cycle times in a horizontal boxplot, with cycle time in days. Hover over any point in the boxplot to see a detail tooltip. At the upper left of the dashboard, use the following filters to refine the display:

Compare data by

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

Compute Cycles by

- Median
- Average

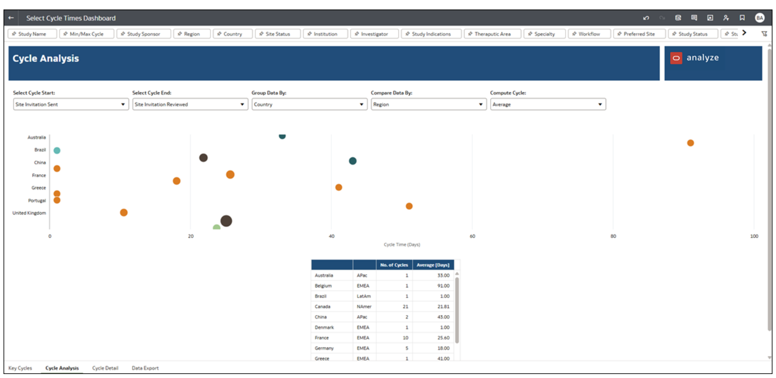


Cycle Analysis

The workbook's second sheet, Cycle Analysis, also includes multiple filter options along the top of the worksheet (e.g., Study Name, Min/Max Cycle, etc.) that allow you to adjust the scope of data. In addition, you can adjust the following filters just above the visualization:

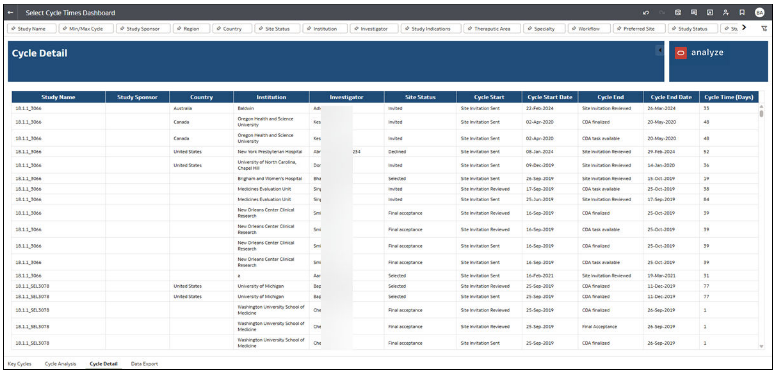
- **Select Cycle Start**: CDA Task Available, Site Invitation Reviewed, Site Invitation Sent, Survey Submitted, Survey Task Available
- **Select Cycle End**: CDA Finalized, Final Acceptance, Site Invitation Sent, Survey Submitted, Survey Task Available
- **Group Data By**: All, Region, Country
- **Compare Data By**: All, Region, Country, Study, PI, Workflow
- **Compute Cycles**: Median or Average

Hover over any point in the horizontal boxplot to see a detail tooltip.



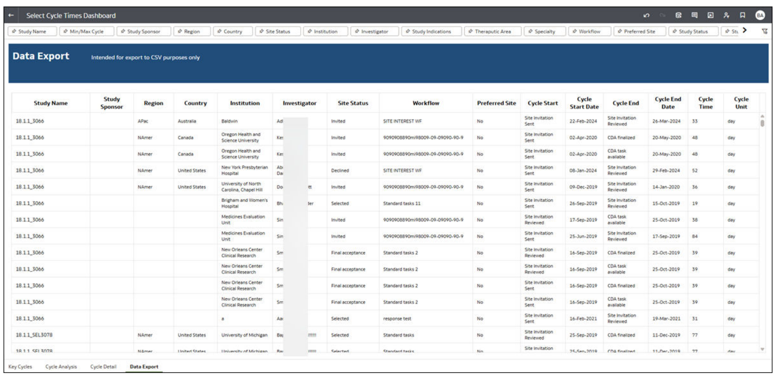
Cycle Detail

The Cycle Detail worksheet provides cycle information in a tabular format. Use the filters at the top of the worksheet to subset the data to your preferred view.



Data Export

The Cycle Times report includes a Data Export worksheet designed specifically for export to a file format. Subset the data as preferred using the filters at the top of the worksheet. To Export, right click anywhere on the worksheet and specify the file format you want for the export.



4
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

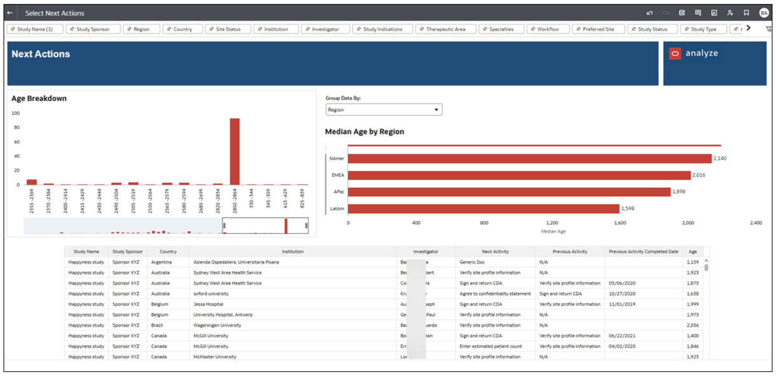
Use the filters along the top of the Next Actions dashboard to subset the report data to a preferred view.

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, and you can adjust the view using the slider at the bottom of the chart. The chart to the right, Median Age by Group, shows median activity age, and you can adjust this chart to group 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


Select Next Actions
Next Actions
analyze
Age Breakdown
Group Data By:
Median Age by Region

5

Notes Report

Workbook synopsis

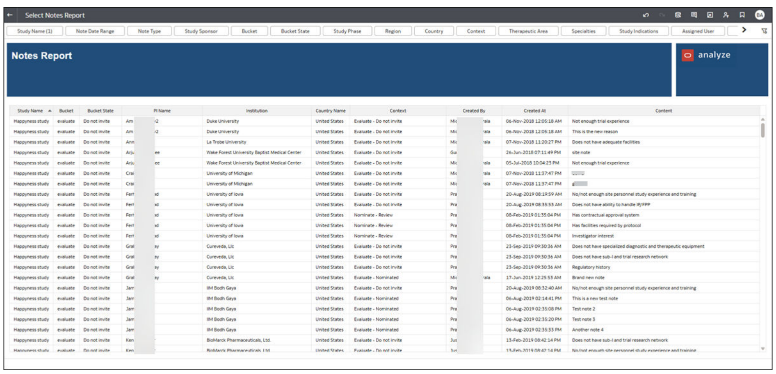
The Oracle Site Analyze Notes Report, intended for Oracle Site Select customers, allows you to view and export notes for one or more studies.

Dashboards and sheets

Notes Report

The Notes Report worksheet provides a tabular view of notes composed for a study. Use the filters along the top of the report worksheet to adjust the report data. For instance, you can specify Study, Note Date Range, Context, etc.

If preferred, you can export the Notes Report worksheet by right-clicking anywhere on the worksheet to access the shortcut menu. Choose Export and select the preferred file type.



6

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/Total Users Selected
- Total Roles/Total Roles Enabled
- Total Permissions/Total Permissions Enabled

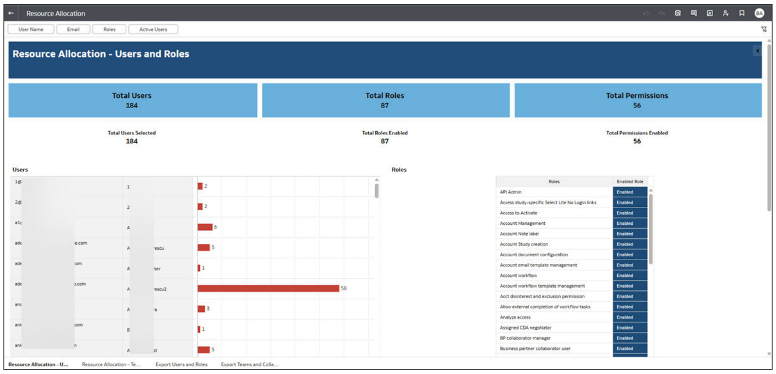
The center of the dashboard includes two tables: Users and Roles

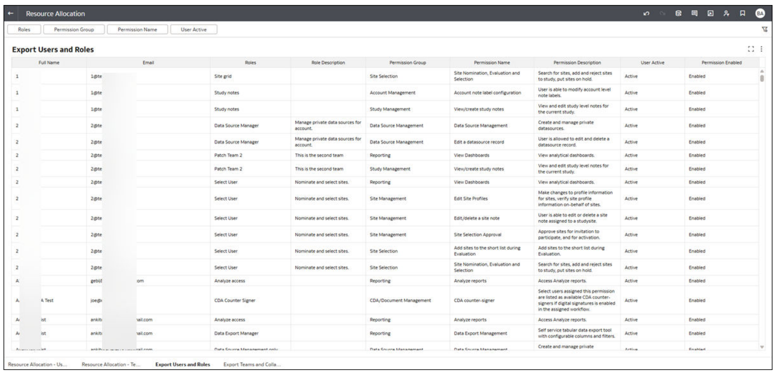
1. **Users** – Includes the individual user’s email, name, and enabled permissions count.
2. **Roles** – Shows each role with “Enabled” (blue).

The dashboard includes multiple filter options at the top of the worksheet that let you subset users and roles data to your preferred view. User Name, Email, Roles, and Active Users apply to the dashboard as a whole, while those in the “Grid Filters” section (Permission Group and Permission Name) apply only to the Permissions table at the bottom of the worksheet.

Please note that the report automatically filters out permissions that are not enabled and account user roles. Additionally, the report does not automatically filter out users who do not have any roles or teams assigned.

By default, filters 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.





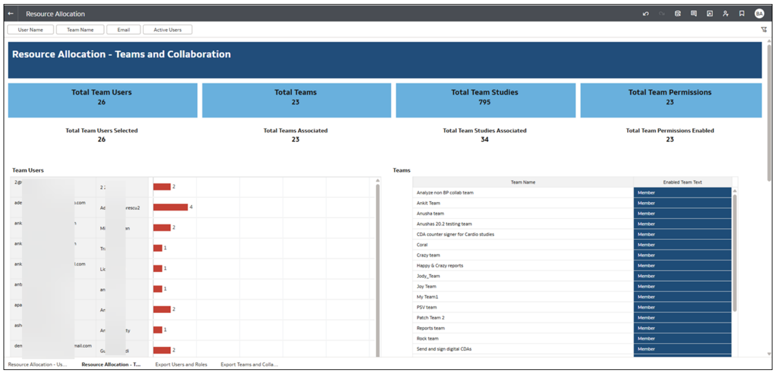
Teams and Collaboration

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 top of the Teams and Collaboration dashboard displays:

- Total Team Users/Total Team Users Selected
- Total Teams/Total Teams Associated
- Total Team Studies/Total Team Studies Associated
- Total Team Permissions/Total Team Permissions Enabled

The dashboard includes multiple filter options at the top of the worksheet that let you subset users and teams data to your preferred view. User Name, Team Name, Email, and Active Users apply to the dashboard as a whole, while those in the “Grid Filters” section (Permission Group and Permission Name) apply only to the Permissions table at the bottom of the worksheet.

By default, filters specified on the Teams and Collaboration dashboard are automatically applied to the export sheet; however, you can adjust the export sheet filters (or remove them) as desired. You can also navigate directly to the Export Teams and Collaboration worksheet to create an export, if preferred.


Resource Allocation
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Total Team Users Selected
26
Total Teams Associated
23
Total Team Studies Associated
34
Total Team Permissions Enabled
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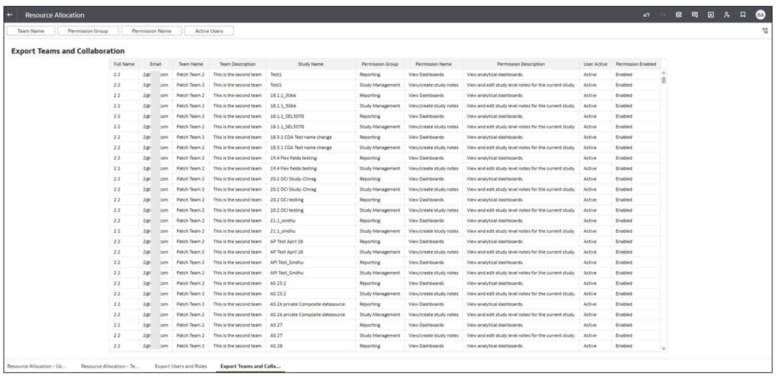
Teams


Resource Allocation
Export Teams and Collaboration

7
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.

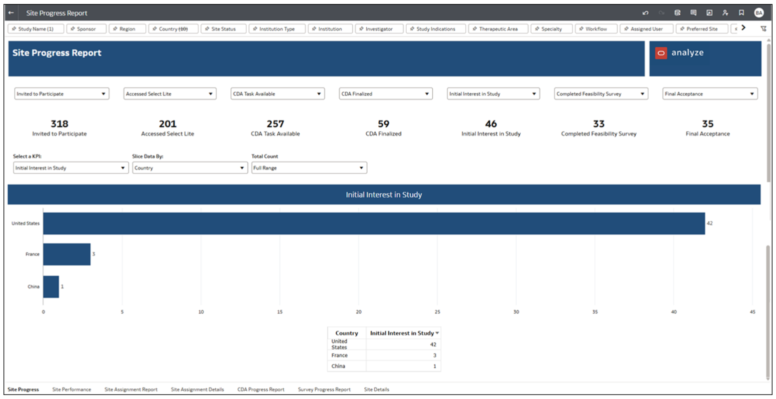
Dashboards and sheets

Site Progress KPI

This worksheet gives you control over the summary Key Performance Indicators (KPIs) and/or bucket state data you prefer to view. Use the filter options along the top of the worksheet to limit the data scope (e.g., choose a specific Study, Sponsor, Region, etc.). You can also dynamically control which of the KPIs/bucket states display in the worksheet. 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

For the lower section of the worksheet, you can also specify the KPI/bucket state shown in the bar graphs. To further refine the view for this visualization, use the “Slice Data By” filter to slice by study, region, or country. Use the“Total Count” filter to control the displayed range (Start/End/Full range).



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:

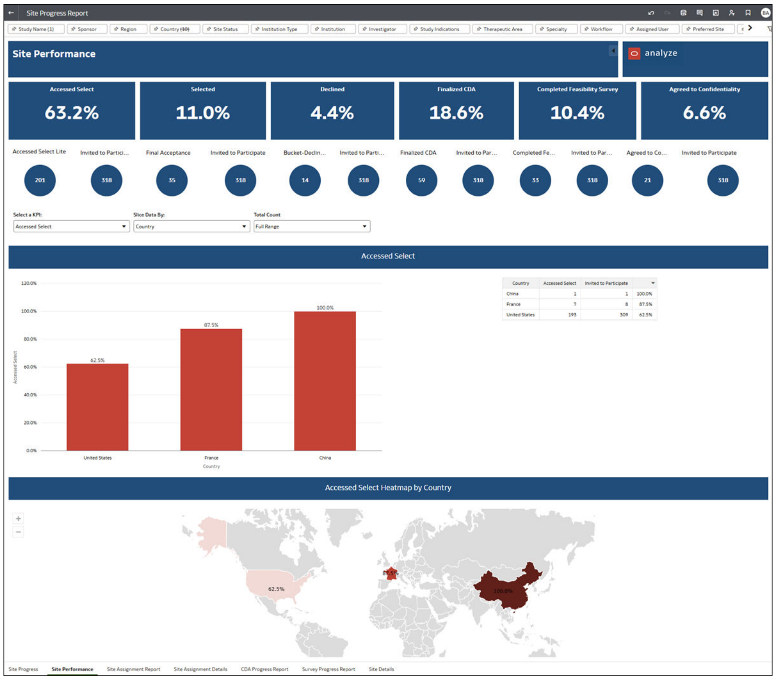
- **Accessed Select** – number of sites that accessed Oracle Site Select LITE divided by the number of sites invited to participate
- **Selected** – number of sites selected divided by the number of sites invited to participate
- **Declined** – number of sites who declined to be in the study divided 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
- **Agreed to Confidentiality -** number of sites that have completed the confidentiality agreement.

Metric calculation sources (e.g., “number of sites selected divided by the number of sites invited to participate”) display in circular graphics below the metrics.

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 filter.

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, a broad range of filters are available at the top of this worksheet that allow you to limit the scope of the data included in the dashboard.



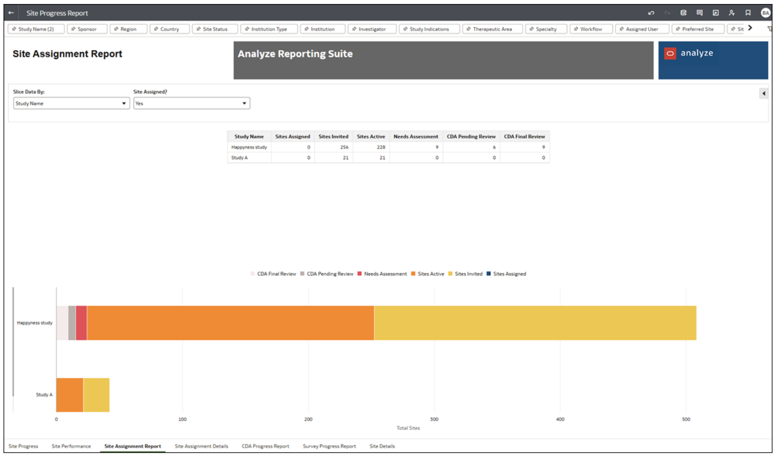
Site Assignment Report

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. The "Site Assigned?" filter lets you select Yes, No, or both. These selection return data as follows:

- Selecting both will include sites that were assigned and sites that were not assigned.
- Selecting Yes will only include sites that are assigned,
- Selecting No will only include sites that are unassigned.

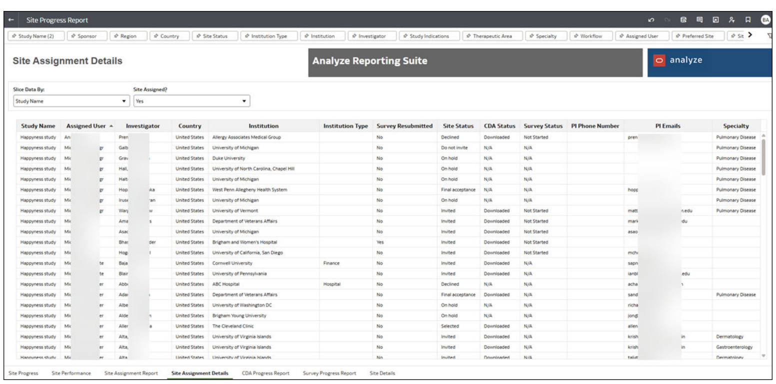


Site Assignment Details

The Site Assignment Details worksheet lets you to filter and export site assignment details to a file, if preferred. You can slice the tabular data by region, country, study, or assigned users. The "Site Assigned?" filter lets you select Yes, No, or both. These selection return data as follows:

- Selecting both will include sites that were assigned and sites that were not assigned.
- Selecting Yes will only include sites that are assigned,
- Selecting No will only include sites that are unassigned.

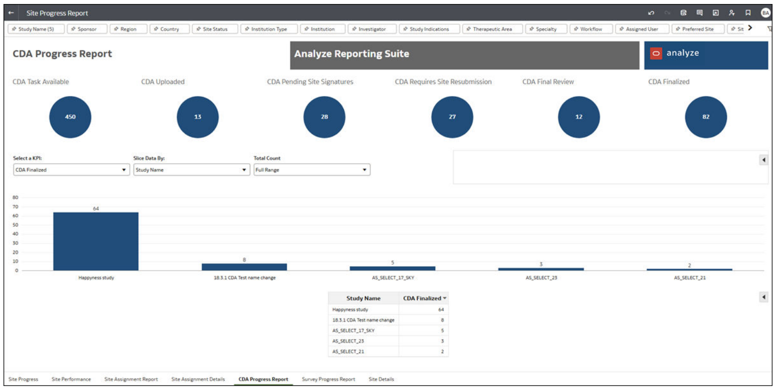
To export the worksheet, you can use Oracle Analytics Cloud standard export controls. Click the Export icon at the top right of the workbook or right click anywhere on the sheet and select File. Then choose your preferred export options (format, orientation, etc.).



CDA Progress Report

CDA progress metrics represented on this worksheet are:

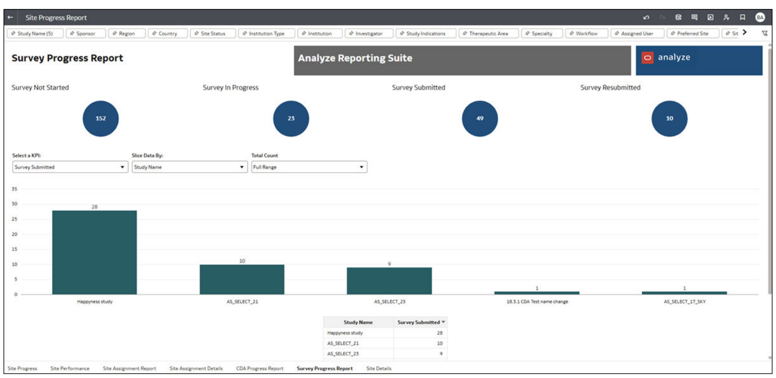
- CDA Task Available
- CDA Uploaded
- CDA Pending Site Signatures
- CDA Requires Site Resubmission
- CDA Final Review
- CDA Finalized



Survey Progress Report

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

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



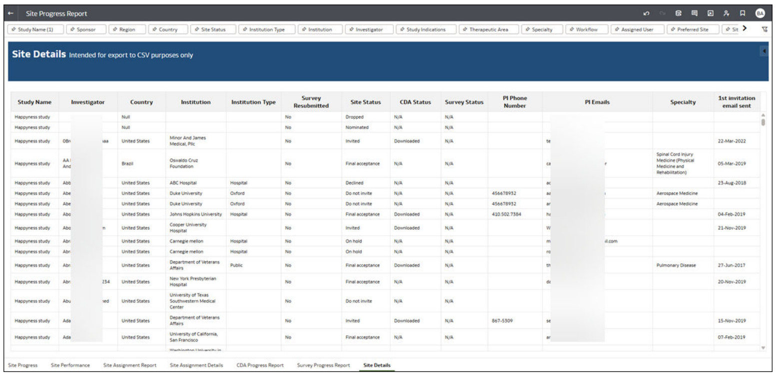
Site Details

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

- Study Name
- Investigator
- Country
- Institution
- Institution type
- Survey Resubmitted
- Site Status
- CDA Status
- Survey Status

- PI Phone Number
- PI Emails
- Specialty
- 1st invitation email sent

To export the worksheet, you can use Oracle Analytics Cloud standard export controls. Click the Export icon at the top right of the workbook or right click anywhere on the sheet and select File. Then choose your preferred export options (CSV format, orientation, etc.).



8

Site Study Interest and Exclusion

Workbook synopsis

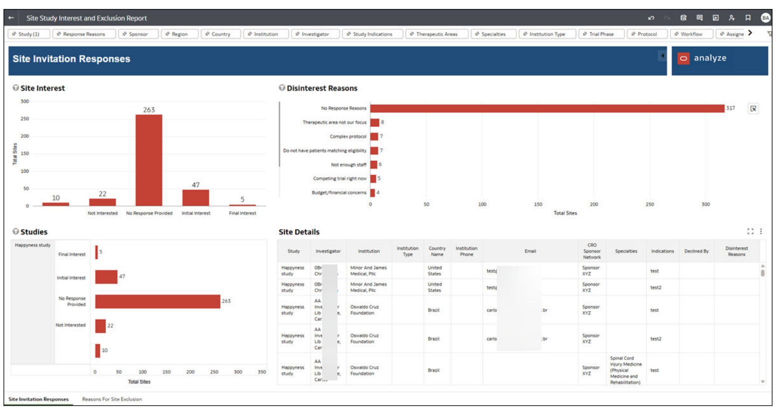
The Oracle Site Analyze Site Study Interest and Exclusion report, intended for Oracle Site Select customers, provides dashboard reports that visualize site invitation response state and reasons for site exclusion or study disinterest.

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.). The Studies and Site Details sections at the bottom of the worksheet show interest by study and investigator metadata (e.g., Name, Country, Specialties, etc.).

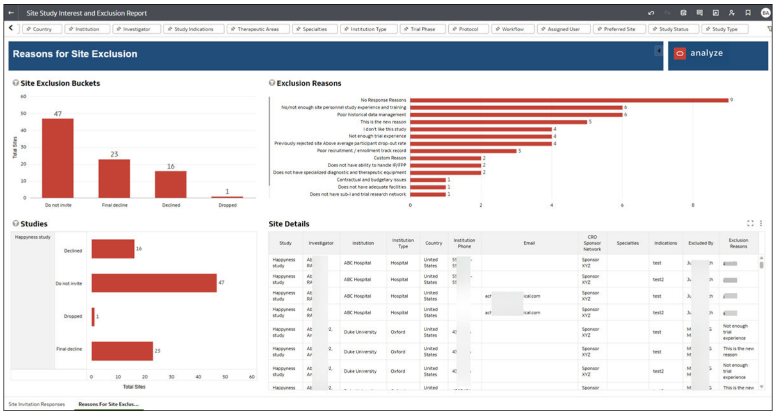
Use the filter options along the top of the worksheet to limit the scope (e.g., Study, Response Reasons, Investigator, etc.) and tailor the available data to your preferred view.



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.).

Use the filter options along the top of the worksheet to limit the scope (e.g., Study, Response Reasons, Investigator, etc.) and tailor the available data to your preferred view.


Site Study Interest and Exclusion Report
Reasons for Site Exclusion
analyze
Site Exclusion Buckets
Exclusion Reasons
Studies
Site Details

9

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

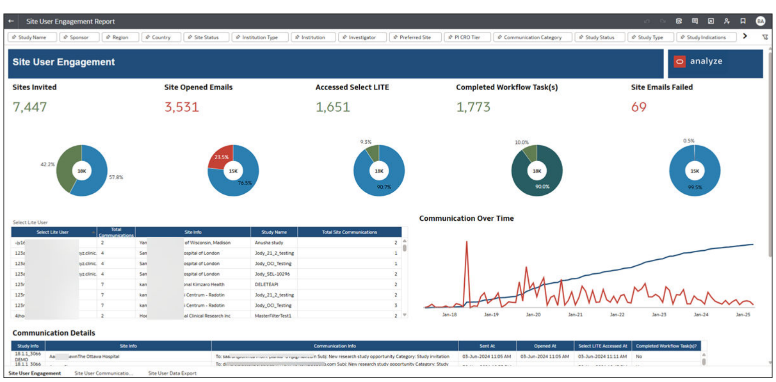
Site User Engagement

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

- Sites Invited – total invited sites
- Site Opened Emails – total emails opened by site users
- Accessed Select LITE – total times a user clicked on the Oracle Site Select LITE link in an email
- Completed Workflow Task(s) – 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

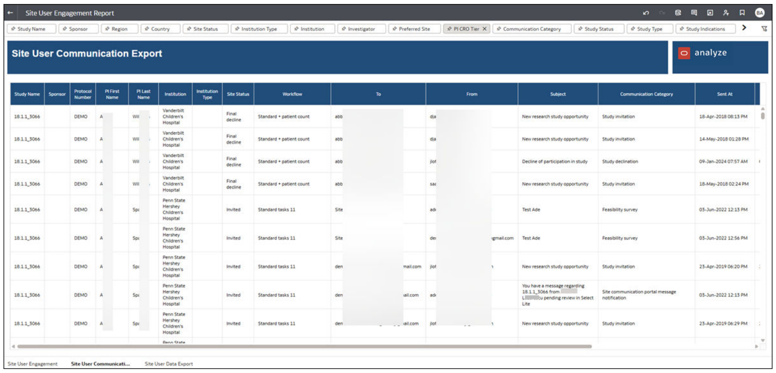
The dashboard also contains a table that shows a summary of all communications by Select Lite User (aggregated by the communication recipient email address), as well as a trend graph that displays the number of site communications and emails per month with a cumulative total over time. Click on the numbers 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 at the top of the worksheet. You can subset the reported data to your preference using filters like Study Name, Sponsor, Communication Category, and more.



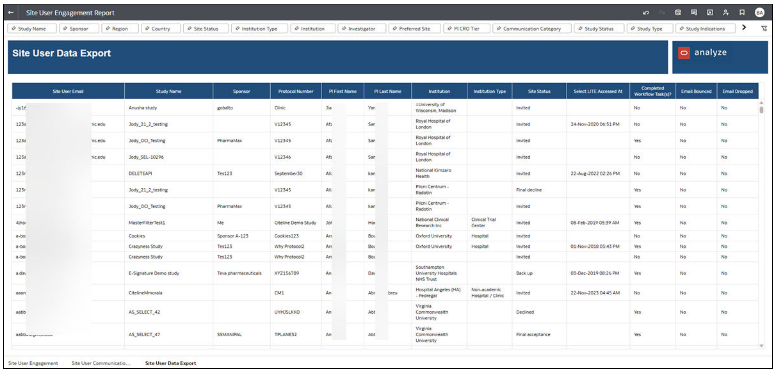
Site User Communication Export

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



Site User Data Export

This worksheet, which we designed specifically for export, provides detailed email communications information. Use the filters at the top of the worksheet to adjust included data to your preference before exporting. To export, right click anywhere on the worksheet and specify your Export file preference.



10 Survey Response Analysis

Workbook synopsis

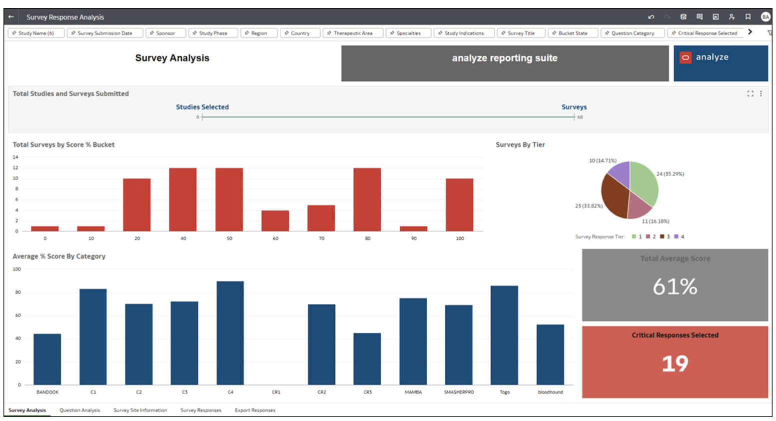
The Oracle Site Analyze Survey Response Analysis workbook, intended for Oracle Site Select customers, provides a detailed dashboard of feasibility survey response data as well as two worksheets designed for data export to CSV.

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 along the top of the worksheet to limit the scope (e.g., choose a specific Study, Survey Submission Date, Therapeutic area, Site status, etc.) and tailor the available data to your preferred view.



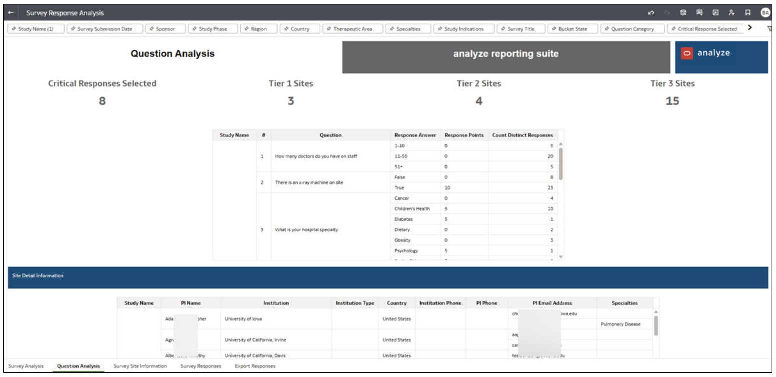
Question Analysis dashboard

The Question Analysis dashboard view lets you easily filter down to those sites that selected a specific response to a specific feasibility survey question for site survey analysis. Use the filter options along the top of the worksheet to limit the scope (e.g., choose a specific Study, Survey Submission Date, Therapeutic area, Site status, etc.) and tailor the available data to your preferred view.

The Question Analysis dashboard has three components:

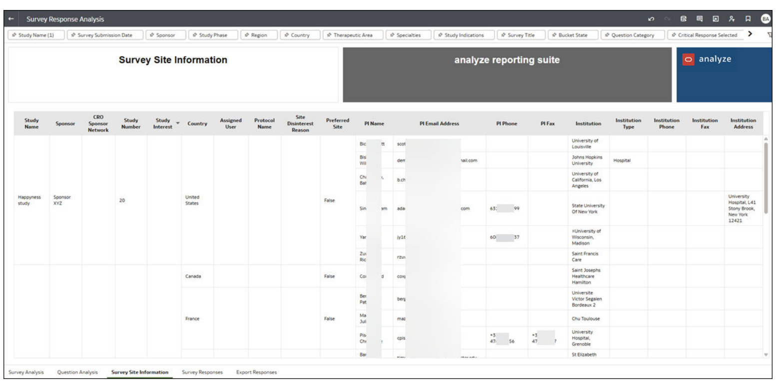
1. Counts for Critical Responses Selected, Tier 1 Sites, Tier 2 Sites, and Tier 3 Sites.
2. A table with question information, including a column with the count of distinct responses to each question.
3. A Site Details table with the following columns:
   - Study name

- PI name
- Institution
- Institution type
- Country
- Institution Phone
- PI Phone
- PI Email Address
- Specialties



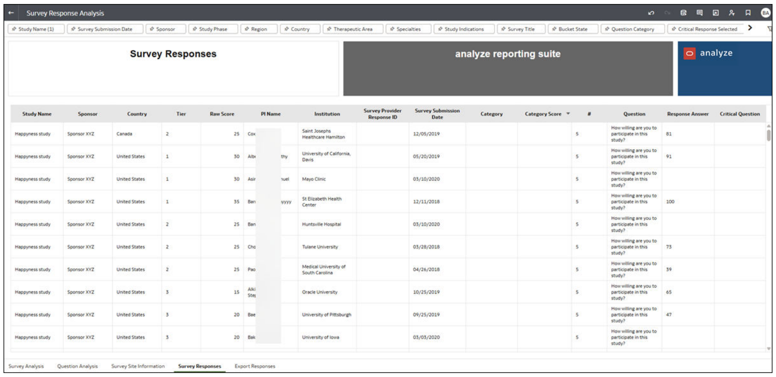
Survey Site Information export

The Survey Site Information export worksheet includes detailed PI and institution data. Use the filter options at the top of the worksheet to tailor the available data to your preferred view before export. To export, right-click anywhere on the worksheet and specify your preferred Export format option.



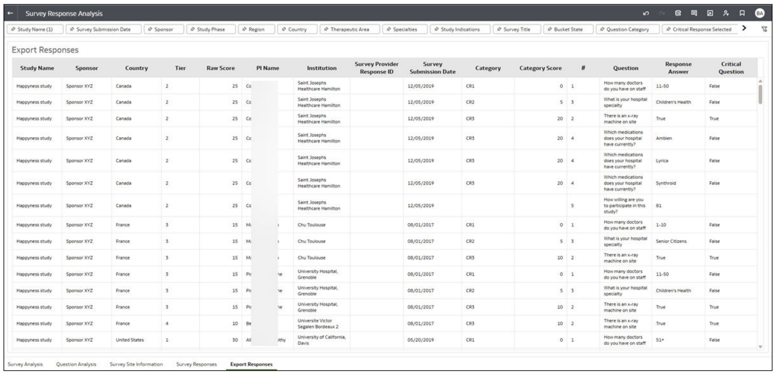
Survey Responses worksheet

The Survey Response worksheet provides an aggregated tabular view that relates to the lower portion of the Survey Response Analysis dashboard. Use the filter options at the top of the worksheet to tailor the available data to your preferred view.



Export Responses worksheet

The Export Responses worksheet has been designed exclusively for export and reflects the filters you set on the Survey Responses worksheet (described above). To export, right-click anywhere on the worksheet and specify your preferred Export format option.

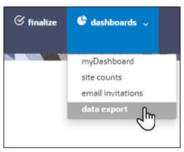


11 Data Export Utility

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.

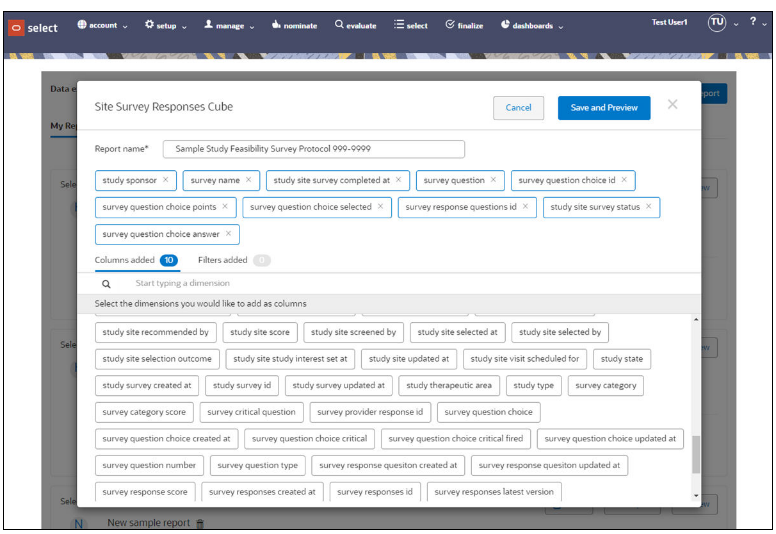


Data extract cubes

Data Extract Cubes

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

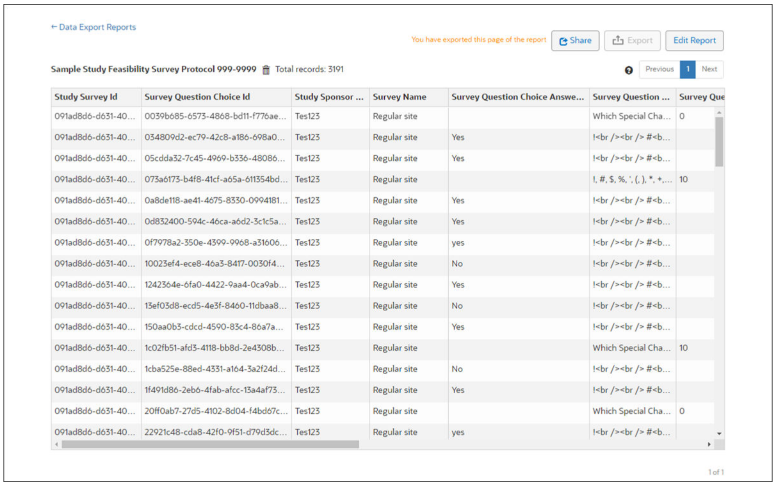
- **Cube** (a multidimensional array of data) – The available data cubes are Note data, Site survey responses, Study site data, and Study-site users. You select one cube per extract.
- **Columns** (dimensions) – For example, PI Name, PI email address, Country, Study, etc. You can add columns in any order.
- **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.

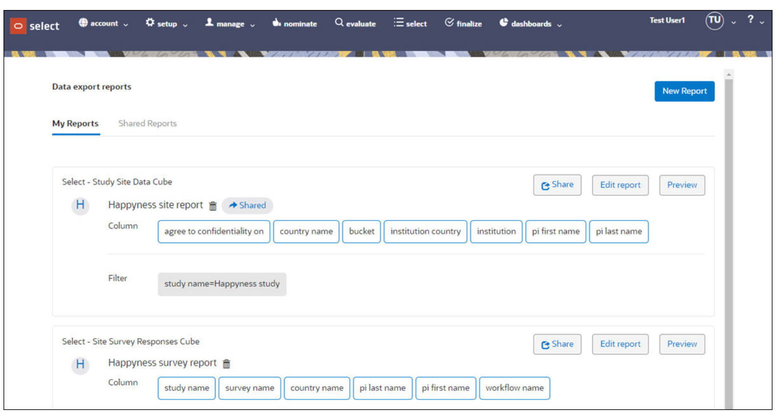
Suppose you click Export when in Preview mode. In that case, the Export function exports the page currently being previewed, and the prompt text, "You have exported this page of the report," displays next to the Export button to indicate the download/export of the report page has started.



Share exports with other users

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

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



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

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

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

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

- Create a new export
  If you have the appropriate business role permission in Oracle Site Select, you can access the Data Export Utility to create a unique export that contains your preferred data then export the result to a .csv format file.
- View existing export
  The Data export report page lists all of your previously-created reports, as well as any reports authored by others and shared with you.
- Edit an existing export
  The My Reports tab on the Data export reports page lists all of your previously created reports, and you can edit any of them as you prefer.
- Delete an export
  When you no longer need a report you created, you can delete it as necessary.
- Share or unshare an export
  Share an export when you want others in your account to have access to an export you authored. When you no longer want others to have access, change the report's access level back to private.

Create a new export

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

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

View existing export

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

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

Edit an existing export

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

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

Delete an export

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

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

Share or unshare an export

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

1. From the Oracle Site Select top navigation, hover over Dashboards and click Data Export.
2. On the Data export reports page, click the **My Reports** tab and locate the export you want to share.
3. Click Share ().

4. In the confirmation modal, select **Shared (Read only to other DEU users)**, and click **Save**.

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