

Oracle Life Sciences Site Analyze Cloud Service

Using Oracle Site Analyze: For Oracle Site Select Users



Release 25.1

G49482-03

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

ORACLE®

Oracle Life Sciences Site Analyze Cloud Service Using Oracle Site Analyze: For Oracle Site Select Users, Release 25.1

G49482-03

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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."

The Oracle Site Select Site progress reports listed below use study level filtering. When determining access, study level filtering limits data shown based on your team assignments in Oracle Site Select. You can view studies linked to your assigned team if the team is enabled, has at least one associated study, and has "Analyze reports" permission enabled. All three conditions must be met for study level access to be granted.

- Next Actions
- Notes Report
- Site Progress Report
- Site Study Interest and Exclusion Report
- Survey Response Analysis

Note

Access to reports in Oracle Analytics Cloud requires user authentication via Oracle Identity Cloud Service (IDCS).

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  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

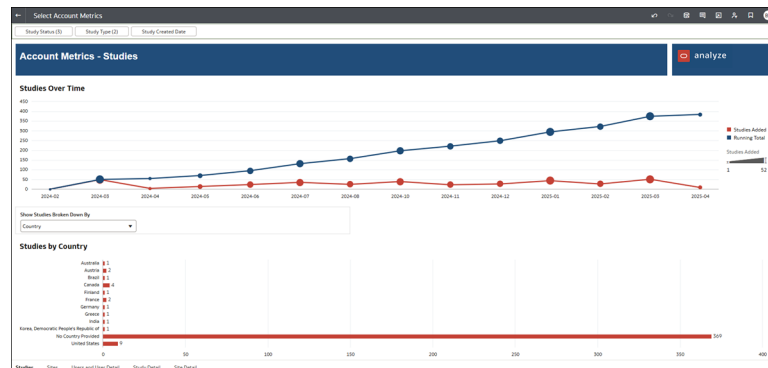
The Account Metrics report workbook, which is intended for Oracle Site Select customers, includes dashboard views of studies, sites, and Oracle Site Select users as well as detailed cross-tab sheets of each.

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.

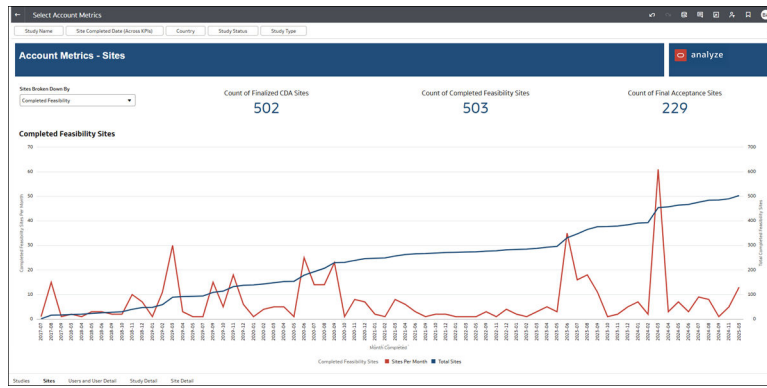
Use the worksheet filters (Study Status, Study Type, and Study Created Date), along the top of the dashboard, to include/exclude data from the dashboard view. Use the "Show Studies Broken Down By" filter, at the center of the worksheet, to change the dimension (country, sponsor, or phase) displayed in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

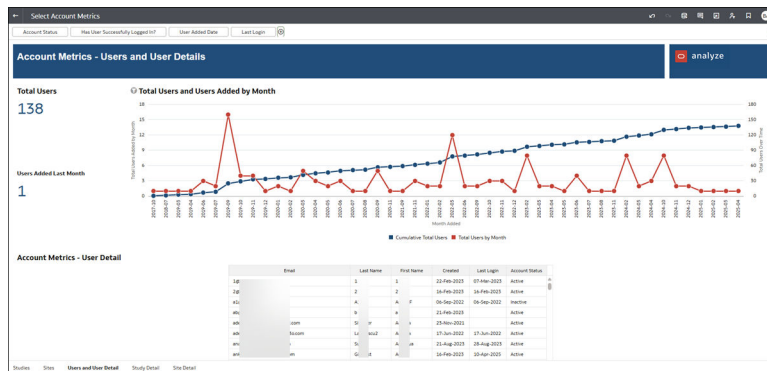
Use the filter options along the top of the worksheet to limit the scope (e.g., choose a specific Study, Site Completed Date, Country, Status, or Type.) and tailor the available data to your preferred view.



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.

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.

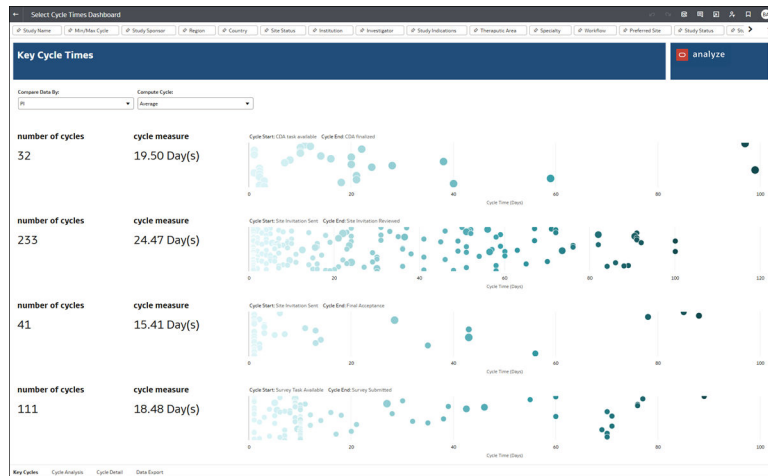
Once you've selected parameters, the Key Cycle Times dashboard displays cycle times in a horizontal boxplot, with cycle time in days. Hover over any point in the boxplot to see a detail tooltip. At the upper left of the dashboard, use the following filters to refine the display:

Compare data by

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

Compute Cycles by

- Median
- Average

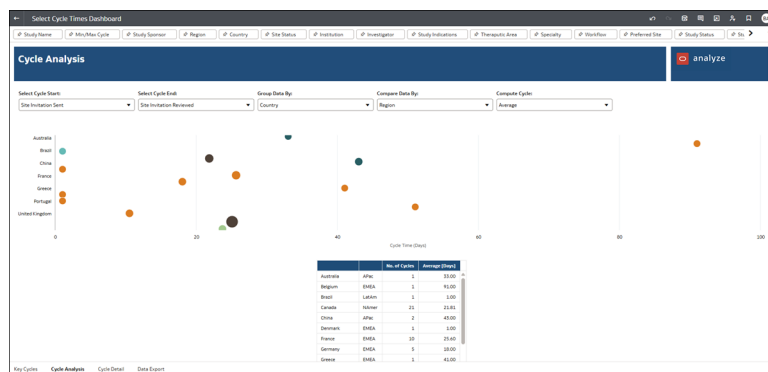


Cycle Analysis

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.

Select Cycle Times Dashboard

Study Name: Min/Max Cycle | Study Sponsor: | Region: | Country: | Site Status: | Investigator: | Study Indicators: | Therapeutic Area: | Specialty: | Workflow: | Preferred Site: | Study Status: |

Cycle Detail

Study Name	Study Sponsor	Country	Institution	Investigator	Site Status	Cycle Start	Cycle Start Date	Cycle End	Cycle End Date	Cycle Time (Days)	
18.1.L.2064		Australia	Bethesda	AD	Included	Site Initiation Sent	22-Feb-2014	Site Initiation Received	24-Feb-2014	33	
18.1.L.2064		Canada	Oregon Health and Science University	AD	Included	Site Initiation Sent	02-Apr-2013	CDM Initiated	28-May-2013	48	
18.1.L.2064		Canada	Oregon Health and Science University	AD	Included	Site Initiation Sent	02-Apr-2013	CDM Initiated	28-May-2013	48	
18.1.L.2064		United States	New York Presbyterian Hospital	AD	24	Declined	Site Initiation Sent	08-Jun-2014	Site Initiation Received	24-Feb-2014	52
18.1.L.2064		United States	University of North Carolina, Chapel Hill	AD	24	Included	Site Initiation Sent	09-Oct-2013	Site Initiation Received	14-Jan-2014	76
18.1.L.2064			Brigham and Women's Hospital	AD	24	Selected	Site Initiation Sent	26-Sep-2013	Site Initiation Received	15-Oct-2013	19
18.1.L.2064			Medicon Evaluation Unit	AD	24	Included	Site Initiation Received	17-Sep-2013	CDM Initiated	25-Oct-2013	38
18.1.L.2064			Medicon Evaluation Unit	AD	24	Included	Site Initiation Sent	25-Jun-2013	Site Initiation Received	22-Sep-2013	84
18.1.L.2064			New Orleans Center Clinical Research	AD	24	Final acceptance	Site Initiation Received	16-Sep-2013	CDM Initiated	25-Oct-2013	39
18.1.L.2064			New Orleans Center Clinical Research	AD	24	Final acceptance	Site Initiation Received	16-Sep-2013	CDM Initiated	25-Oct-2013	39
18.1.L.2064			New Orleans Center Clinical Research	AD	24	Final acceptance	Site Initiation Sent	16-Sep-2013	CDM Initiated	25-Oct-2013	39
18.1.L.2064			New Orleans Center Clinical Research	AD	24	Final acceptance	Site Initiation Sent	16-Sep-2013	CDM Initiated	25-Oct-2013	39
18.1.L.2064			*	AD	24	Selected	Site Initiation Sent	16-Feb-2012	Site Initiation Received	19-Mar-2012	31
18.1.L.1613078		United States	University of Michigan	AD	24	Selected	Site Initiation Received	25-Sep-2013	CDM Initiated	11-Oct-2013	17
18.1.L.1613078		United States	University of Michigan	AD	24	Selected	Site Initiation Sent	25-Sep-2013	CDM Initiated	11-Oct-2013	17
18.1.L.1613078			Washington University School of Medicine	AD	24	Final acceptance	Site Initiation Received	25-Sep-2013	CDM Initiated	26-Sep-2013	1
18.1.L.1613078			Washington University School of Medicine	AD	24	Final acceptance	Site Initiation Received	25-Sep-2013	Final Acceptance	26-Sep-2013	1
18.1.L.1613078			Washington University School of Medicine	AD	24	Final acceptance	Site Initiation Sent	25-Sep-2013	CDM Initiated	26-Sep-2013	1

Key Cycles | Cycle Analysis | Cycle Detail | Data Export

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.

Select Cycle Times Dashboard

Study Name: Min/Max Cycle | Study Sponsor: | Region: | Country: | Site Status: | Investigator: | Study Indicators: | Therapeutic Area: | Specialty: | Workflow: | Preferred Site: | Study Status: |

Data Export

Intended for export to CSV purposes only

Study Name	Study Sponsor	Region	Country	Institution	Investigator	Site Status	Workflow	Preferred Site	Cycle Start	Cycle Start Date	Cycle End	Cycle End Date	Cycle Time	Cycle Unit	
18.1.L.2064		Other	Australia	Bethesda	AD	Included	STC 4719237 001	No	Site Initiation Sent	22-Feb-2014	Site Initiation Received	24-Feb-2014	33	Day	
18.1.L.2064		Belgium	Canada	Oregon Health and Science University	AD	Included	1000000000000000-00-00000-00-0	No	Site Initiation Sent	02-Apr-2013	CDM Initiated	28-May-2013	48	Day	
18.1.L.2064		Belgium	Canada	Oregon Health and Science University	AD	Included	1000000000000000-00-00000-00-0	No	Site Initiation Sent	02-Apr-2013	CDM Initiated	28-May-2013	48	Day	
18.1.L.2064		Belgium	United States	New York Presbyterian Hospital	AD	24	Declined	STC 4719237 001	No	Site Initiation Sent	08-Jun-2014	Site Initiation Received	24-Feb-2014	52	Day
18.1.L.2064		Belgium	United States	University of North Carolina, Chapel Hill	AD	24	Included	1000000000000000-00-00000-00-0	No	Site Initiation Sent	09-Oct-2013	Site Initiation Received	14-Jan-2014	76	Day
18.1.L.2064				Brigham and Women's Hospital	AD	24	Selected	Standard basis 1.1	No	Site Initiation Sent	26-Sep-2013	Site Initiation Received	15-Oct-2013	19	Day
18.1.L.2064				Medicon Evaluation Unit	AD	24	Included	1000000000000000-00-00000-00-0	No	Site Initiation Received	17-Sep-2013	CDM Initiated	25-Oct-2013	38	Day
18.1.L.2064				Medicon Evaluation Unit	AD	24	Included	1000000000000000-00-00000-00-0	No	Site Initiation Sent	25-Jun-2013	Site Initiation Received	22-Sep-2013	84	Day
18.1.L.2064				New Orleans Center Clinical Research	AD	24	Final acceptance	Standard basis 2	No	Site Initiation Received	16-Sep-2013	CDM Initiated	25-Oct-2013	39	Day
18.1.L.2064				New Orleans Center Clinical Research	AD	24	Final acceptance	Standard basis 2	No	Site Initiation Received	16-Sep-2013	CDM Initiated	25-Oct-2013	39	Day
18.1.L.2064				New Orleans Center Clinical Research	AD	24	Final acceptance	Standard basis 2	No	Site Initiation Sent	16-Sep-2013	CDM Initiated	25-Oct-2013	39	Day
18.1.L.2064				New Orleans Center Clinical Research	AD	24	Final acceptance	Standard basis 2	No	Site Initiation Sent	16-Sep-2013	CDM Initiated	25-Oct-2013	39	Day
18.1.L.2064				*	AD	24	Selected	response test	No	Site Initiation Sent	16-Feb-2012	Site Initiation Received	19-Mar-2012	31	Day
18.1.L.1613078		Belgium	United States	University of Michigan	AD	24	Selected	Standard basis	No	Site Initiation Received	25-Sep-2013	CDM Initiated	11-Oct-2013	17	Day
18.1.L.1613078		Belgium	United States	University of Michigan	AD	24	Selected	Standard basis	No	Site Initiation Sent	25-Sep-2013	Final Acceptance	26-Sep-2013	1	Day

Key Cycles | Cycle Analysis | Cycle Detail | Data 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.

Study-level filtering determines your access to this report by limiting data based on your team assignments in Oracle Site Select. You can view studies linked to your assigned team only if the team is enabled, has at least one associated study, and has *Analyze reports* permission enabled. All three conditions must be met for study-level access so that you can access this report.

Dashboards and sheets

Next Actions

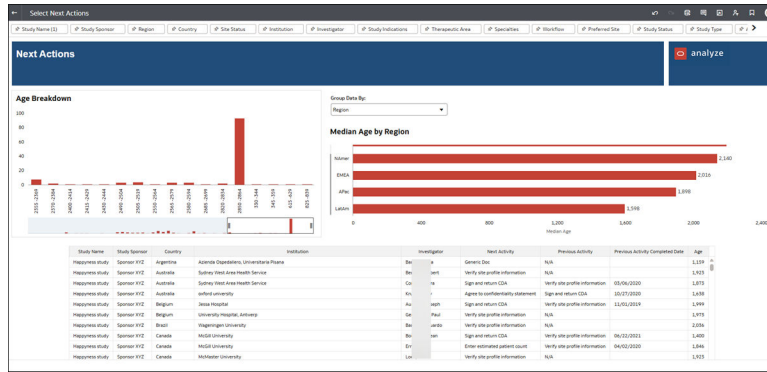
Use the filters along the top of the Next Actions dashboard to subset the report data to a preferred view.

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



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.

Study-level filtering determines your access to this report by limiting data based on your team assignments in Oracle Site Select. You can view studies linked to your assigned team only if the team is enabled, has at least one associated study, and has *Analyze reports* permission enabled. All three conditions must be met for study-level access so that you can access this report.

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, Note Label, 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.

The screenshot shows the Oracle Site Analyze Notes Report interface. At the top, there is a navigation bar with various filters and a search bar. Below the navigation bar, there is a table with columns for Study Name, Bucket, Bucket Date, P Name, Institution, Country Name, Context, Labels, Created By, Created At, and Content. The table contains several rows of data, including studies from the University of Chicago, Johns Hopkins University, and the University of South Alabama. The content column contains various notes related to site visits and equipment.

Study Name	Bucket	Bucket Date	P Name	Institution	Country Name	Context	Labels	Created By	Created At	Content
AS Production 00.2	Finalize	Final acceptance	Site	University of Chicago	United States	Evaluate - Short list	Note_dbl_01	Aut	20-Aug-2015 05:51:20 AM	Generic name, Reference
JOHNSH081	evaluate	Do not visit	Range	US	United States	Evaluate - Do not visit		Aut	30-Sep-2015 05:55:26 AM	Does not have adequate facilities
JOHNSH081	evaluate	Do not visit	Range	US	United States	Evaluate - Do not visit		Aut	30-Sep-2015 05:55:26 AM	Does not have specialized equipment and laboratory equipment
JOHNSH081	evaluate	Do not visit	Range	US	United States	Evaluate - Do not visit		Aut	30-Sep-2015 05:55:26 AM	Does not have adequate facilities
JOHNSH081	evaluate	Do not visit	Range	US	United States	Evaluate - Do not visit		Aut	30-Sep-2015 05:55:26 AM	Does not have specialized equipment and laboratory equipment
JOHNSH081	evaluate	Short list	Range	US	Johns Hopkins University	Evaluate - Short list	Note_dbl_01	Aut	30-Sep-2015 05:55:26 AM	PHS/NIH
JOHNSH081	Finalize	Final acceptance	Site	US	New York University	Evaluate - Short list	Note_dbl_01	Aut	30-Sep-2015 05:55:26 AM	Compassionate
JOHNSH081	Finalize	Final acceptance	Site	US	Cedars-Sinai Medical Center	Evaluate - Short list	Note_dbl_01	Aut	30-Sep-2015 05:55:26 AM	Re...
JOHNSH081	Finalize	Final acceptance	Site	US	University of Colorado, Denver	Evaluate - Short list	Note_dbl_01	Aut	30-Sep-2015 05:55:26 AM	Does not have ability to transfer BMT
JOHNSH081	Finalize	Final acceptance	Site	US	University of Colorado, Denver	Evaluate - Short list	Note_dbl_01	Aut	30-Sep-2015 05:55:26 AM	Does not have specialized equipment and laboratory equipment
JOHNSH081	Finalize	Final acceptance	Site	US	Department of Veterans Affairs	Nonvisit - Drugged	Note_dbl_01	Aut	03-Sep-2015 12:14:42 PM	Site facilities inspected and found adequate for drug development.
JOHNSH081	Finalize	Final acceptance	Site	US	Department of Veterans Affairs	Nonvisit - Drugged	Note_dbl_01	Aut	03-Sep-2015 12:14:42 PM	Does not have adequate facilities
JOHNSH081	Finalize	Final acceptance	Site	US	Department of Veterans Affairs	Nonvisit - Drugged	Note_dbl_01	Aut	03-Sep-2015 12:14:42 PM	Does not have specialized equipment and laboratory equipment
JOHNSH081	Finalize	Final acceptance	Site	US	PHS/NIH	Nonvisit - Review	Note_dbl_01	Aut	03-Sep-2015 12:14:42 PM	Regulatory documents received and verified.
JOHNSH081	Finalize	Final acceptance	Site	US	Duke University	Evaluate - Short list	Note_dbl_01	Aut	30-Sep-2015 05:55:26 AM	Signatures
JOHNSH081	Finalize	Final acceptance	Site	US	University of South Alabama	Site visit/No		Ch	03-Sep-2015 12:14:42 PM	Complete protocol
JOHNSH081	Finalize	Final acceptance	Site	US	University of South Alabama	Site visit/No		Ch	03-Sep-2015 12:14:42 PM	It is very complex for the site
JOHNSH081	Finalize	Final acceptance	Site	US	University of South Alabama	Site visit/No		Ch	03-Sep-2015 12:14:42 PM	All Staff on vacation
JOHNSH081	Finalize	Final acceptance	Site	US	University of South Alabama	Site visit/No		Ch	03-Sep-2015 12:14:42 PM	Not enough staff

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

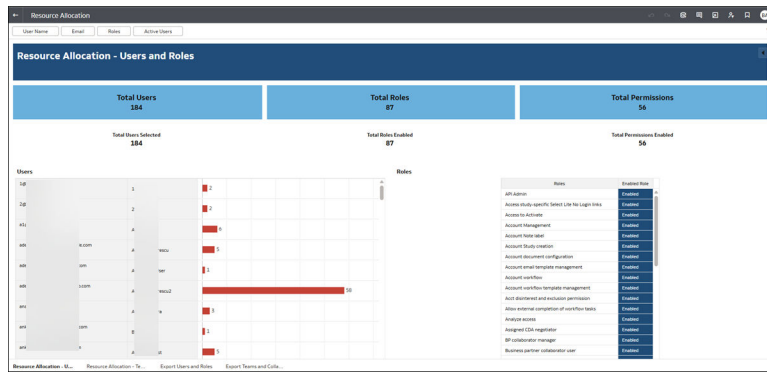
The center of the dashboard includes two tables: Users and Roles

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.



Export Users and Roles

ID	Full Name	Email	Role	Role Description	Permission Group	Permission Name	Permission Description	User Active	Permission Enabled
1	SJohn		Site mgr	Site Selection	Site Navigation, Evaluation and Selection	Search for sites, add and select sites for study, and view reports	Active	Enabled	
1	SJohn		Study/roles	Account Management	Account role management	User is able to modify account level permissions	Active	Enabled	
1	SJohn		Study/roles	Study/roles	View/create study roles	User can edit study role roles for the current study	Active	Enabled	
1	SJohn		Data Source Manager	Manage private data sources for account	Data Source Management	Create and manage private data sources	Active	Enabled	
2	SJohn		Data Source Manager	Manage private data sources for account	Data Source Management	User is allowed to edit and delete a connection role	Active	Enabled	
2	SJohn		Public Team 2	This is the second team	Reporting	View dashboards	User can view dashboards	Active	Enabled
2	SJohn		Public Team 2	This is the second team	Study Management	View/create study roles	User can edit study role roles for the current study	Active	Enabled
2	SJohn		Select User	Normalize and select sites	Reporting	View dashboards	User can view dashboards	Active	Enabled
2	SJohn		Select User	Normalize and select sites	Site Management	Edit Site Profiles	User can edit site profiles	Active	Enabled
2	SJohn		Select User	Normalize and select sites	Site Management	Edit/delete a site role	User is able to edit or delete a site role assigned to a role	Active	Enabled
2	SJohn		Select User	Normalize and select sites	Site Management	Site Selection Approval	Approve sites for inclusion to a connection and its activities	Active	Enabled
2	SJohn		Select User	Normalize and select sites	Site Selection	Just sites to the short list during Evaluation	Add sites to the short list during Evaluation	Active	Enabled
2	SJohn		Select User	Normalize and select sites	Site Selection	Site Navigation, Evaluation and Selection	Search for sites, add and select sites for study, and view reports	Active	Enabled
A	gjohn	gjohn	Analyst access		Reporting	Analyst reports	Access analyst reports	Active	Enabled
A	A Test	atest@	CSA (Customer Signer)		CSA (Customer Management)	CSA (customer signer)	Select user assigned the permission and roles to sign agreements in the site project workflow	Active	Enabled
A	at	at@	Analyst access		Reporting	Analyst reports	Access analyst reports	Active	Enabled
A	at	at@	CSA (Customer Signer)		CSA (Customer Management)	CSA (customer signer)	Select user assigned the permission and roles to sign agreements in the site project workflow	Active	Enabled
A	at	at@	Analyst access		Reporting	Analyst reports	Access analyst reports	Active	Enabled

Teams and Collaboration

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

Total Team Users	Total Teams	Total Team Studies	Total Team Permissions
26	23	795	23

Team Users

User	Team	Permissions
zjp	zj	2
ash	ash	4
ash	ash	2
ash	ash	1
ash	ash	1
ash	ash	2
ash	ash	2
ash	ash	2

Teams

Team Name	Enabled Team Test
Analyze non BP code team	Enabled
ASH team	Enabled
ASH team	Enabled
ASH team 20.2 testing team	Enabled
CDL center register for Cancer studies	Enabled
Code	Enabled
Code team	Enabled
Health & Study reports	Enabled
Judy Team	Enabled
Jay Team	Enabled
Jay Team	Enabled
PSY team	Enabled
Public Team 2	Enabled
Report team	Enabled
Rock team	Enabled
Send and age alpha CDL	Enabled

Export Teams and Collaboration

User Name	Team Name	Team Description	Study Name	Permission Group	Permission Name	Permission Description	User Action	Permission Enabled
zjp	ash	This is the second team	Test1	Reporting	View Dashboards	View analytical dashboards	Active	Enabled
zjp	ash	This is the second team	Test1	Study Management	View/Mark study notes	View and edit study level notes for the current study	Active	Enabled
zjp	ash	This is the second team	18.1.1.004	Reporting	View Dashboards	View analytical dashboards	Active	Enabled
zjp	ash	This is the second team	18.1.1.104	Study Management	View/Mark study notes	View and edit study level notes for the current study	Active	Enabled
zjp	ash	This is the second team	18.1.1.107	Reporting	View Dashboards	View analytical dashboards	Active	Enabled
zjp	ash	This is the second team	18.1.1.107	Study Management	View/Mark study notes	View and edit study level notes for the current study	Active	Enabled
zjp	ash	This is the second team	18.1.1.108	Reporting	View Dashboards	View analytical dashboards	Active	Enabled
zjp	ash	This is the second team	18.1.1.108	Study Management	View/Mark study notes	View and edit study level notes for the current study	Active	Enabled
zjp	ash	This is the second team	18.1.1.109	Reporting	View Dashboards	View analytical dashboards	Active	Enabled
zjp	ash	This is the second team	18.1.1.109	Study Management	View/Mark study notes	View and edit study level notes for the current study	Active	Enabled
zjp	ash	This is the second team	18.1.1.110	Reporting	View Dashboards	View analytical dashboards	Active	Enabled
zjp	ash	This is the second team	18.1.1.110	Study Management	View/Mark study notes	View and edit study level notes for the current study	Active	Enabled
zjp	ash	This is the second team	18.1.1.111	Reporting	View Dashboards	View analytical dashboards	Active	Enabled
zjp	ash	This is the second team	18.1.1.111	Study Management	View/Mark study notes	View and edit study level notes for the current study	Active	Enabled
zjp	ash	This is the second team	18.1.1.112	Reporting	View Dashboards	View analytical dashboards	Active	Enabled
zjp	ash	This is the second team	18.1.1.112	Study Management	View/Mark study notes	View and edit study level notes for the current study	Active	Enabled
zjp	ash	This is the second team	18.1.1.113	Reporting	View Dashboards	View analytical dashboards	Active	Enabled
zjp	ash	This is the second team	18.1.1.113	Study Management	View/Mark study notes	View and edit study level notes for the current study	Active	Enabled
zjp	ash	This is the second team	18.1.1.114	Reporting	View Dashboards	View analytical dashboards	Active	Enabled
zjp	ash	This is the second team	18.1.1.114	Study Management	View/Mark study notes	View and edit study level notes for the current study	Active	Enabled
zjp	ash	This is the second team	18.1.1.115	Reporting	View Dashboards	View analytical dashboards	Active	Enabled
zjp	ash	This is the second team	18.1.1.115	Study Management	View/Mark study notes	View and edit study level notes for the current study	Active	Enabled
zjp	ash	This is the second team	18.1.1.116	Reporting	View Dashboards	View analytical dashboards	Active	Enabled
zjp	ash	This is the second team	18.1.1.116	Study Management	View/Mark study notes	View and edit study level notes for the current study	Active	Enabled
zjp	ash	This is the second team	18.1.1.117	Reporting	View Dashboards	View analytical dashboards	Active	Enabled
zjp	ash	This is the second team	18.1.1.117	Study Management	View/Mark study notes	View and edit study level notes for the current study	Active	Enabled
zjp	ash	This is the second team	18.1.1.118	Reporting	View Dashboards	View analytical dashboards	Active	Enabled
zjp	ash	This is the second team	18.1.1.118	Study Management	View/Mark study notes	View and edit study level notes for the current study	Active	Enabled

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.

Study-level filtering determines your access to this report by limiting data based on your team assignments in Oracle Site Select. You can view studies linked to your assigned team only if the team is enabled, has at least one associated study, and has *Analyze reports* permission enabled. All three conditions must be met for study-level access so that you can access this report.

Dashboards and sheets

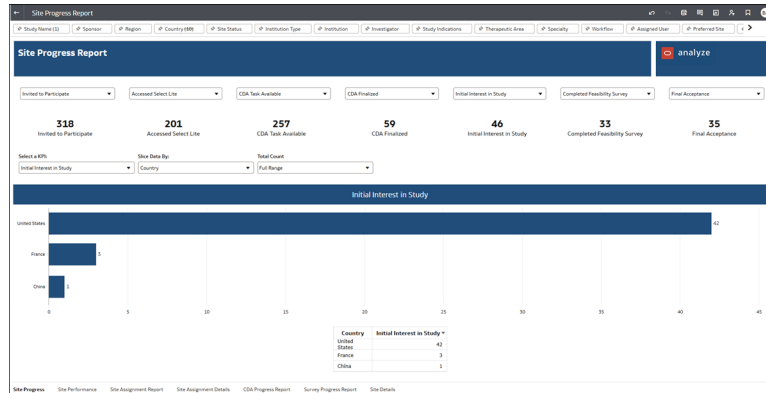
Site Progress KPI

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.

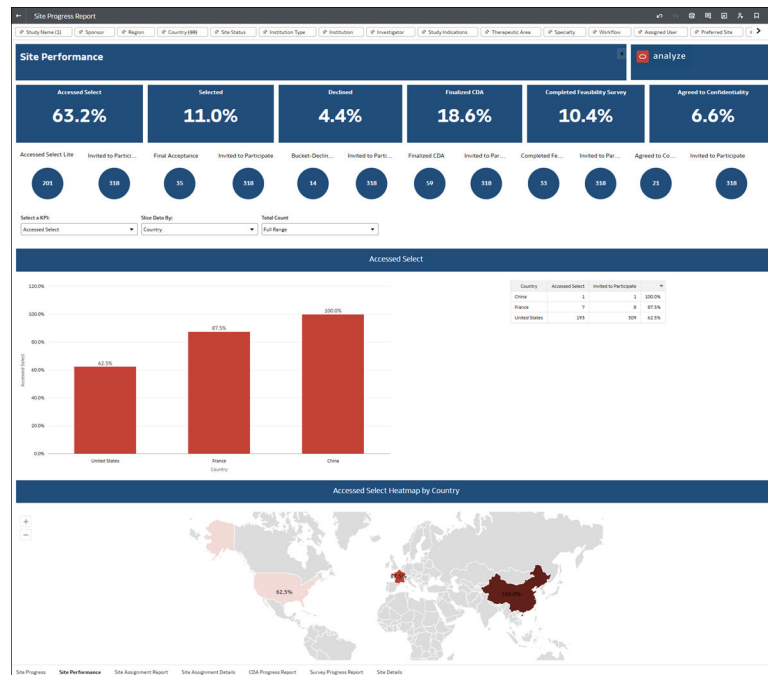
Metric calculation sources (e.g., “number of sites selected divided by the number of sites invited to participate”) display in circular graphics below the metrics.

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.



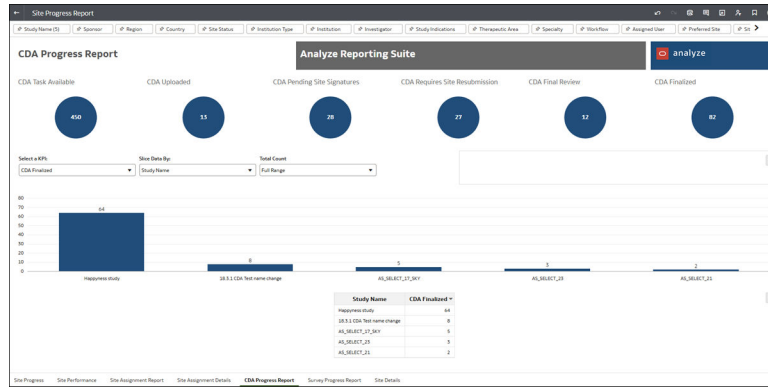
Site Assignment Report

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:

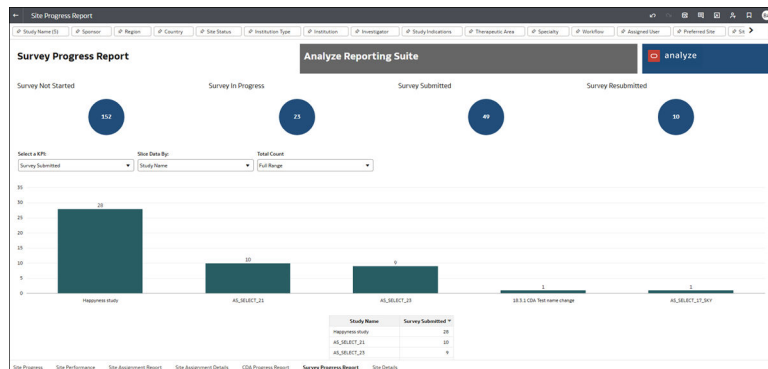
- Selecting both will include sites that were assigned and sites that were not assigned.
- Selecting Yes will only include sites that are assigned,
- Selecting No will only include sites that are unassigned.



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.).

Study Name	Investigator	Country	Institution	Institution Type	Survey Recontacted	Site Status	CDA Status	Survey Status	PI Phone Number	PI Emails	Specialty	1st Invitation Email Sent
Happiness study		N/A			No	Enrolled	N/A	N/A				
Happiness study		N/A			No	Disenrolled	N/A	N/A				
Happiness study	DB	USA	NIH and James Watson Inst		No	Invited	Downloaded	N/A				23-Mar-2022
Happiness study	AI	USA	Stanford Univ		No	Final acceptance	N/A	N/A			Special Care Home (Hospice and Respite)	05-Mar-2023
Happiness study	AD	United States	ABC Hospital	Hospital	No	Declined	N/A	N/A				23-Aug-2018
Happiness study	AD	United States	Stanford Univ	Outlet	No	Do not invite	N/A	N/A	05477912		Assistance Medicine	
Happiness study	AD	United States	State University	Outlet	No	Do not invite	N/A	N/A	45477912			
Happiness study	AD	United States	Johns Hopkins University	Hospital	No	Final acceptance	Downloaded	N/A	432-552-7354			04-Feb-2019
Happiness study	AD	United States	Casper Memorial Hospital	Hospital	No	Invited	Downloaded	N/A				23-Mar-2023
Happiness study	AD	United States	Carle Foundation Hospital	Hospital	No	Do not	N/A	N/A				
Happiness study	AD	United States	Carle Foundation Hospital	Hospital	No	Do not	N/A	N/A				
Happiness study	AD	United States	Department of Veterans Affairs	Public	No	Final acceptance	Downloaded	N/A			Pulmonary Disease	27-Jun-2017
Happiness study	AD	USA	New York Presbyterian Hospital		No	Final acceptance	N/A	N/A				20-Mar-2018
Happiness study	AD	USA	University of Texas Southwestern Medical Center		No	Do not invite	N/A	N/A				
Happiness study	AD	United States	Department of Veterans Affairs		No	Invited	Downloaded	N/A	807-5320			23-Mar-2018
Happiness study	AD	United States	University of California, San Francisco		No	Final acceptance	N/A	N/A				07-Feb-2020

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.

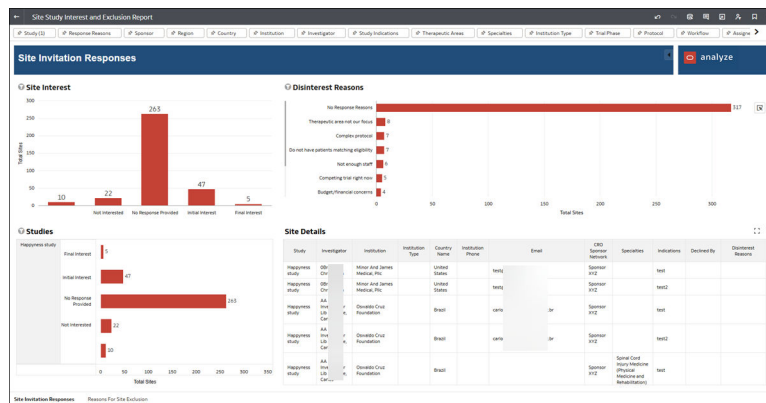
Study-level filtering determines your access to this report by limiting data based on your team assignments in Oracle Site Select. You can view studies linked to your assigned team only if the team is enabled, has at least one associated study, and has *Analyze reports* permission enabled. All three conditions must be met for study-level access so that you can access this report.

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.).

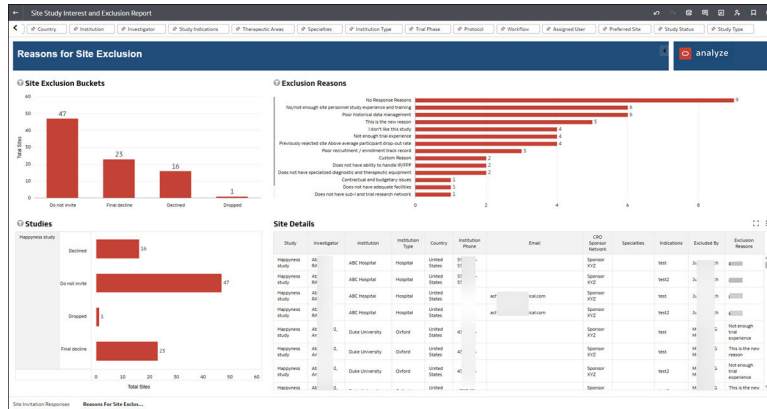
Use the filter options along the top of the worksheet to limit the scope (e.g., Study, Response Reasons, Investigator, etc.) and tailor the available data to your preferred view.



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.



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

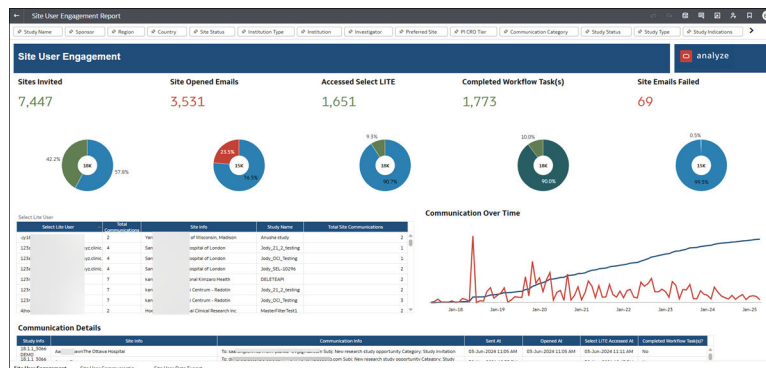
Site User Engagement

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

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.

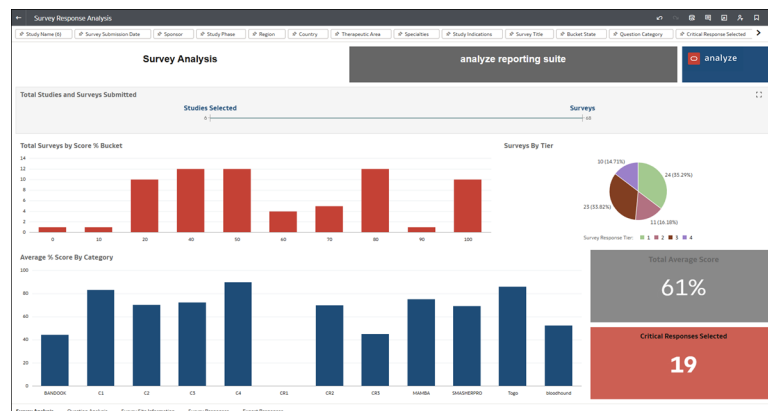
Study-level filtering determines your access to this report by limiting data based on your team assignments in Oracle Site Select. You can view studies linked to your assigned team only if the team is enabled, has at least one associated study, and has *Analyze reports* permission enabled. All three conditions must be met for study-level access so that you can access this report.

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

The screenshot shows the Oracle Site Analyze dashboard. The top navigation bar includes filters for Study Name, Survey Submission Date, Sponsor, Study Phase, Region, Country, Therapeutic Area, Specialties, Study Indicators, Survey Title, Bucket State, Question Category, and Critical Response Selected. The main content area is titled 'Question Analysis' and features a table with columns: Study Name, #, Question, Response Answer, Response Points, and Count Distinct Responses. Below this is a 'Site Details Information' section with a table listing study sites with columns: Study Name, PI Name, Institution, Institution Type, Country, Institution Phone, PI Phone, PI Email Address, and 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.

The screenshot shows the 'Survey Site Information' export worksheet. It features a table with columns: Study Name, Sponsor, CRD Question Network, Study Number, Study Interest, Country, Assigned User, Protocol Name, Site Development Branch, Preferred Site, PI Name, PI Email Address, PI Phone, PI Fax, Institution, Institution Type, Institution Phone, Institution Fax, and Institution Address. The table lists various study sites across different countries and institutions.

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.

Study Name	Sponsor	Country	Tier	Raw Score	PI Name	Institution	Survey Provider	Survey Submission Date	Category	Category Score	#	Question	Response Answer	Critical Question
Happiness study	Sponsor XYZ	Canada	2	25	CA	Saint Joseph's Healthcare Hamilton		11/05/2019	OR1		5	How willing are you to participate in this study?	81	
Happiness study	Sponsor XYZ	United States	1	30	AM	University of California, Davis		05/20/2019			5	How willing are you to participate in this study?	91	
Happiness study	Sponsor XYZ	United States	1	30	AM	Mayo Clinic		05/05/2020			5	How willing are you to participate in this study?		
Happiness study	Sponsor XYZ	United States	1	35	SM	St Elizabeth's Health Center		12/13/2018			5	How willing are you to participate in this study?	100	
Happiness study	Sponsor XYZ	United States	2	25	BA	Marquette Hospital		03/10/2020			5	How willing are you to participate in this study?		
Happiness study	Sponsor XYZ	United States	2	25	CA	Kaiser University		05/08/2018			5	How willing are you to participate in this study?	75	
Happiness study	Sponsor XYZ	United States	2	25	PA	Medical University of South Carolina		04/29/2018			5	How willing are you to participate in this study?	59	
Happiness study	Sponsor XYZ	United States	3	15	AL	Duke University		10/05/2019			5	How willing are you to participate in this study?	65	
Happiness study	Sponsor XYZ	United States	3	20	SM	University of Pittsburgh		09/05/2019			5	How willing are you to participate in this study?	67	
Happiness study	Sponsor XYZ	United States	3	20	BA	University of Iowa		05/05/2020			5	How willing are you to participate in this study?		

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.

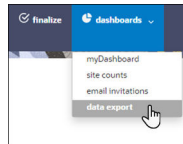
Study Name	Sponsor	Country	Tier	Raw Score	PI Name	Institution	Survey Provider	Survey Submission Date	Category	Category Score	#	Question	Response Answer	Critical Question
Happiness study	Sponsor XYZ	Canada	2	25	CA	Saint Joseph's Healthcare Hamilton		11/05/2019	OR1		0	How many doctors do you have on staff?	11-50	False
Happiness study	Sponsor XYZ	Canada	2	25	CA	Saint Joseph's Healthcare Hamilton		11/05/2019	OR1		5	What is your hospital's security?	Doctors's health	False
Happiness study	Sponsor XYZ	Canada	2	25	CA	Saint Joseph's Healthcare Hamilton		11/05/2019	OR1		20	There is an in-day machine on site	True	True
Happiness study	Sponsor XYZ	Canada	2	25	CA	Saint Joseph's Healthcare Hamilton		11/05/2019	OR1		20	Other medications like your hospital has on site	Arabic	False
Happiness study	Sponsor XYZ	Canada	2	25	CA	Saint Joseph's Healthcare Hamilton		11/05/2019	OR1		20	What medications does your hospital have on site?	Latin	False
Happiness study	Sponsor XYZ	Canada	2	25	CA	Saint Joseph's Healthcare Hamilton		11/05/2019	OR1		20	Other medications like your hospital has on site	Synthetic	False
Happiness study	Sponsor XYZ	Canada	2	25	CA	Saint Joseph's Healthcare Hamilton		11/05/2019			5	How willing are you to participate in this study?	81	
Happiness study	Sponsor XYZ	France	3	15	LA	Chu Toulouse		06/01/2017	OR1		0	How many doctors do you have on staff?	0-10	False
Happiness study	Sponsor XYZ	France	3	15	LA	Chu Toulouse		06/01/2017	OR2		5	What is your hospital's security?	Senior Citizens	False
Happiness study	Sponsor XYZ	France	3	15	LA	Chu Toulouse		06/01/2017	OR1		10	There is an in-day machine on site	True	True
Happiness study	Sponsor XYZ	France	3	15	PA	University Hospital, Grenoble		06/01/2017	OR1		0	How many doctors do you have on staff?	11-50	False
Happiness study	Sponsor XYZ	France	3	15	PA	University Hospital, Grenoble		06/01/2017	OR2		5	What is your hospital's security?	Doctors's health	False
Happiness study	Sponsor XYZ	France	3	15	PA	University Hospital, Grenoble		06/01/2017	OR3		10	There is an in-day machine on site	True	True
Happiness study	Sponsor XYZ	France	4	10	BA	Université Victor Segalen Bordeaux 2		06/01/2017	OR1		10	There is an in-day machine on site	True	True
Happiness study	Sponsor XYZ	United States	1	30	AM	University of California, Davis		05/20/2019	OR1		0	How many doctors do you have on staff?	51+	False

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.

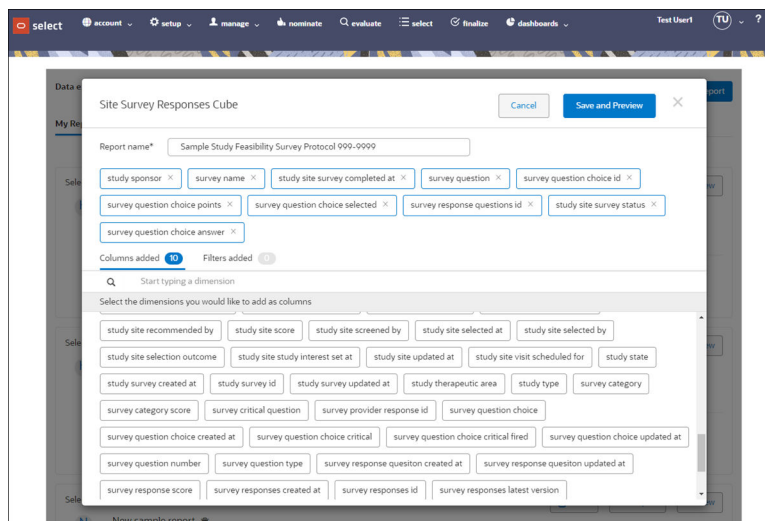



Data extract cubes

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.



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**.