# viedoc learning<sup>®</sup>

## Viedoc Clinic User Guide

57 Lessons 57 from Viedoc System

General				9	9 lessons
•	Overview of Viedoc Clinic	1.1		System requirements	1.2
\$	Managing your Viedoc account	1.3		Overview of the landing pag	e 1.4
\$	Approving eCRF changes	1.5		What's new in the latest release?	1.6
\$	Updated Known limitations	1.7		Updated Glossary	1.8
\$	How to prepare for a regulatory inspection	1.9			
Quick guic	les				1 lessons
\$	Quick guide for preparing for regulatory inspections	2.1			
Data entry	/				9 lessons
•	Study start page	3.1		Documentation & Training	3.2
•	Metrics	3.3		Selection page	3.4

\$	Updated Entering/Editing data	3.5	\$	Resetting and deleting data	3.6
\$	Signing data	3.7	\$	Working with reference date	a 3.8
\$	Randomization, allocation, and emergency unblinding	3.9			
Data revie	9W			:	3 lessons
\$	lssues and tasks	4.1	\$	Clinical review, SDV, and Loo	ck 4.2
\$	Data review and Lock	4.3			
Queries					5 lessons
\$	Queries overview	5.1	\$	Raising and promoting pre- queries	5.2
•	Raising/Approving/Rejecting queries	5.3	\$	Resolving queries	5.4
\$	Role-based queries	5.5			
Data expo	ort			1	1 lessons
\$	Updated Exporting data	6.1	\$	Excel export	6.2
\$	PDF export output	6.3	\$	Queries in ODM export	6.4
\$	Queries in Excel export	6.5	\$	Medical coding in ODM export	6.6

\$	Medical coding in Excel export	6.7	\$	Review status in ODM export	6.8
•	Review status in Excel export	6.9	\$	Exporting for SAS	6.10
•	Archiving a study	6.11			
Medical co	oding			2	lesson
\$	Updated Medical coding	7.1	\$	Medical coding version 4.78 and earlier	7.2
Viedoc Me	9			3	lesson
\$	Managing Viedoc Me	8.1	\$	Using Viedoc Me (information for study participants) version 4.70 and earlier	ר 8.2
\$	Updated Using Viedoc Me (information for study participants)	8.3			
Viedoc Co	nnect			1	lesson
•	Using Viedoc Connect	9.1			
Viedoc Sh	are			1	lesson
•	Updated Receiving Documents with Viedoc Share	10.1			
Video tuto	rials			12	lesson
	Site User training	11.1		Create a user account	11.2
	Log in/Log out and reset password	11.3		Landing page	11.4

Add and select subjects	11.5	Initiate and add visits	11.6
Enter data	11.7	Sign data 1	11.8
Issues: Resolve a query	11.9	Activate demo mode	1.10
Enter reference data	11.11	Monitor training video 1*	1.12



**Overview of Viedoc Clinic** 

## **Overview of Viedoc Clinic**

Published by Viedoc System 2024-10-10

#### 1. Introduction 2. Languages

This lesson provides an overview of Viedoc Clinic. It describes the user interface and summarizes the main settings that can be configured in Viedoc Clinic.

## 1 Introduction

Viedoc Clinic is the interface for the end user, and is primarily used by site and study staff (Investigators, Study Coordinators, Monitors, Data Managers and so on) and keeps track of all the activities performed by the site.

Viedoc 🚸 🕼 Demo Study				Soff Ann 🛛 🛛	nvestigator 📈	70 🌣 -
Letails				<u>1</u> °	l 1.	< <sup>8</sup> ► 1/254
DE-95-077 BERLIN HOSPITAL	Search			Show al		
STATUS AGE Ongoing 41.1	Screening Screening	Baseline	Follow-Up test	Final Visit End of Study		
	14 07 2021	16 07 2021	23 07 2021	26 07 2021		
29% 4/4 8/27 of study events forms	Screening	Ongoing				า
Demographics	Screening				Protocol date not set	Ŭ
Common events	Event date		DM □	CRA SDV	Scheduled date not set	G
Medical / Surgical History (2) + Prior and Concomitant Medications (0) +	Check Questions		DM		Event date 14 07 2021	赵
Adverse Events (0) + Subject's non-study medications (0)	Physical Examination			•	1107 2021	

The access to Viedoc Clinic is by invitation only and provided by either the Study Manager or Site Manager. If invited, you will find the invitation in your email inbox (from *no-reply@viedoc.net*). In some cases the email can be caught by your email spam filter and in that case you will find it in the email spam folder. For detailed instructions on account activation, see <u>Managing.your Viedoc account</u>.

The following main actions can be performed in Viedoc Clinic:

- Data entry covered by the following lessons:
  - <u>Selection page</u>
  - <u>Entering/Editing data</u>
  - <u>Resetting and deleting data</u>
  - <u>Signing data</u>
  - Working with reference data
- Raise and resolve queries described in <u>Resolving queries</u>
- Data export described in Exporting data
- Medical coding described in <u>Medical coding</u>
- View study metrics described in <u>Metrics</u> and <u>Viedoc Reports</u>



Viedoc Clinic is available in the following languages:

- Chinese (Simplified)
- Chinese (Traditional)
- English
- French
- German
- Japanese
- Polish
- Portuguese
- Spanish
- Swedish



System requirements

## System requirements

Published by Viedoc System 2022-06-16

#### 1. Customer computer requirements

- 1.1 Browser requirements
- 1.2 Screen resolution
- 1.3 Internet connection
- 1.4 Firewall policy

2. Security

1

## Customer computer requirements

Customer computer requirements are defined as capabilities required by the customer computer to use all features of Viedoc with the intended graphical presentation and within guaranteed response times of Viedoc.

### 1.1 Browser requirements

Viedoc supports the following browsers:

- Chrome, the latest 10 major releases (6-week browser release interval)
- Firefox, the latest 15 major releases (4-week browser release interval)
- Edge (Chromium edition), the latest 10 major releases (6-week browser release interval)
- Safari (MacOS/iOS only), the latest 2 major releases (1-year browser release interval)

For non-compliant browsers you will receive a message on the login page that your browser is not supported.

For Viedoc Designer:

- Chrome is recommended
- Allow pop-ups must be enabled

Viedoc does not support the use of private mode browsing in Safari.

The following are required for Viedoc to run in the compatible web browsers:

- JavaScript
- Session cookies
- Local web storage (only required by the main portal of Viedoc 4)

No data is permanently stored on the customer computer. All data stored in session cookies or local web storage is deleted when the browser session is terminated. The only exception to this is the optional persistent cookie used in the main portal of Viedoc 4 to remember if a user chooses to issue a 2FA trust for the browser for 30 days, and thus avoid further second-factor authentication during this period.

Viedoc 3 has no automatic checks enforcing the above requirements. Viedoc 4 checks for, and enforces, browser type and version, and support for JavaScript, local web storage, and session cookies.

## 1.2 Screen resolution

The following screen resolutions are required:

- Viedoc 3: at least 800×600
- Viedoc 4: at least 1024×768

## 1.3 Internet connection

Viedoc requires an internet connection of at least 384 kbit/s.

## 1.4 Firewall policy

Viedoc requires an outbound firewall policy allowing encrypted HTTP to be established and communicated to a remote server on port 443 (HTTPS) using Transport Layer Security (TLS) version 1.2 or higher.

## 2 Security

There are several layers of security built into the platform. Below are some examples:

- Login attempts after three failed attempts to enter a correct password, your account is locked. Use the "Forgot your password?" link on the login page to unlock and reset your password. The reset password link must be used within 3 hours from a request. There are restrictions on how many times you can submit a request in 24 hours.
- **Inactivity** if you are inactive for more than 20 minutes, the system automatically logs you out. Inactivity means no activity whatsoever in the application.
- **Two-factor authentication** two-factor authentication is an extra security measure that requires an extra confirmation step at login, in addition to user name and password.
- Password expiration the password expiration time depends on the settings for your study. However, the
  default setting is 90 days. In addition to this, a history of the latest 10 passwords are kept to prevent
  reusing old passwords.

**ح** 

Managing your Viedoc account

## Managing your Viedoc account

Published by Viedoc System 2024-10-10

1. Viedoc user account management 2. User settings 2.1 Adding a secondary email address 2.2 Verifying a secondary email address 2.3 Changing the primary email address 2.4 Editing your phone number 2.5 Verifying your phone number 3. Study access management 4. Access settings 4.6 Study membership 4.7 Deleting study access 4.8 Deleting your Viedoc account 5. Pending invitations 5.9 Approving a study invitation 5.10 Rejecting a study invitation 5.11 Postponing the approval/rejection of a study invitation 6. Logging out

## 1 Viedoc user account management

Important! All information related to managing your Viedoc account can be found in the following user guide: <u>Viedoc User Account Management</u>

From the settings button (wheel) you can perform all actions related to managing your Viedoc account by selecting any of the following: Edit your profile, Change Password, Security Settings:

Dr. Demo	¢
Edit your	profile
Change P	assword
Security S	ettings
Access Se	ttings
Log out	

Selecting any of these options opens a new page, in the example below, the <u>User Settings</u> page. Select the Viedoc learning link to open the Viedoc User Account Management Guide:

viedoc			
User Settings Change Password	User Settings		
Security Settings	A Ownership of +4612345678 has not I	been verified!	
Authentication Log	User name This is used to log in to Viedoc doctordemo@viedoc.com		
viedoc learning 🌶			
	First name Doctor Display name This is your Viedoc user name Doctor Demo	Last name Demo	

## 2 User settings

Once logged in, you can edit your profile.

To view or edit your user settings, select the settings button (wheel) in the top right corner of the landing page, and select **Edit your profile**. The **User Settings** page opens, where you can configure the following:

**1. User name** - this is your primary email address used for your Viedoc account. This is the user name you use to log in to Viedoc. See below information on primary email address.

2. First name and Last name - fill in these fields that will be used to compose the Display name which will be used in Viedoc to identify your user.

3. System language - select the language of your choice from the drop-down menu.

**4. Primary email address** - this is the same as the **User name** described above. It is the email address used in Viedoc to log in, as well as for Viedoc user account-related operations (account setup, password recovery, study invitations). By default, this is set to the email address used to initiate the Viedoc user account.

The primary email address must be unique and is mandatory. Therefore, it is not possible to delete the primary email address.

See Changing the primary email address.

5, 6, 7, 8. Secondary email addresses - you can add up to 3 additional email addresses that will be used by Viedoc to send notifications on alerts and trackers as configured in Viedoc Designer. Viedoc alert emails will be sent to all the primary and verified secondary email addresses set up for your account. See Adding a secondary email address and Verifying a secondary email address.

9, 10, 11. Phone number - enter your phone number in format +[CountryCodePhoneNumber] (for example +46123456789) and if you want to receive text messages, select This phone can receive text messages. See Editing your phone number and Verifying your phone number.

#### Important!

- You must either select one of the options **This phone can receive text messages**, <u>or</u> configure a secondary email address to be able to recover your password yourself. If neither of these options are selected, you will need to contact your Study Manager to receive a link to reset your password.
- One of the above options is needed in order to send the authentication code you will need to provide for resetting your password. The phone number or secondary email address provided will be used to send the authentication code even if these are not verified.

12. Contact information - fill in the following fields: your street address, city, state, postal code and country.

#### User Settings

	-
▲ Ownership of	has not been verified!
User name This is used to log in to Viedo	
DoctorDemo@viedoc.co	Π
First name	Last name
Doctor	Demo
Display name This is your Viedoc user name	2
Doctor Demo	
System language This language will be used wh Select language	available.
<sup>&gt;</sup> rimary email addr	ss 4
DoctorDemo@viedoc.co Secondary email ac Emails from Viedoc will also b	m v dresses sent to these addresses 5 6
DoctorDemo@viedoc.co Secondary email ac Emails from Viedoc will also b @viedoc.com	m v dresses sent to these addresses 5 6 v Set as primary T Delete
DoctorDemo@viedoc.co Secondary email ac mails from Viedoc will also b @viedoc.com @viedoc.co	m v dresses sent to these addresses 5 6 v Set as primary Delete m v Verify email address Delete
DoctorDemo@viedoc.co Secondary email ac mails from Viedoc will also b @viedoc.com @viedoc.co Add another email ac	m v dresses sent to these addresses 5 6 v Set as primary Delete m v Verify email address Delete
DoctorDemo@viedoc.co Secondary email ac mails from Viedoc will also b @viedoc.com @viedoc.co Add another email ac	m v dresses sent to these addresses 5 6 v Set as primary Delete m v Verify email address Delete
DoctorDemo@viedoc.co Secondary email ac emails from Viedoc will also b @viedoc.com @viedoc.co Add another email ac Phone number 9	m v dresses sent to these addresses 5 6 v Set as primary Delete m v Verify email address Delete ress 8 v Verify phone number
DoctorDemo@viedoc.co Secondary email ac Emails from Viedoc will also b @viedoc.com @viedoc.co Add another email ac Phone number \$ +4612345678 This phone can rec Contact information	m v dresses sent to these addresses 5 6 set as primary Delete m v Verify email address Delete ress 8 7 Verify phone number ive text messages 1 1
DoctorDemo@viedoc.co Secondary email ac Emails from Viedoc will also b @viedoc.com @viedoc.com @viedoc.co @ Add another email ac Phone number \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	m v dresses sent to these addresses 5 6 set as primary Delete m v Verify email address Delete ress 8 7 Verify phone number ive text messages 1 1
DoctorDemo@viedoc.co Secondary email ac Emails from Viedoc will also b @viedoc.com @viedoc.com @viedoc.co @ Add another email ac Phone number \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	n v dresses sent to these addresses 5 6 set as primary Delete m v Verify email address Delete tress 8 verify phone number ve text messages 1 1 2 1 2 1 2 1 2 1 2 1 2 1 2 1 2 1 2 2 2 2 2 2 2 2 2 2 2 2 2
DoctorDemo@viedoc.co Secondary email ad Emails from Viedoc will also to @viedoc.com @viedoc.co Add another email ad Phone number 9 +4612345678 This phone can rec Contact information Places keep your contact info Street address Street address	n v dresses sent to these addresses 6 6 6 Set as primary 1 Delete n v Verify email address 1 Delete v Verify phone number v Verify phone number 10 v Verify phone number 11 12 nation up to date City Postol code
Secondary email ad Emails from Viedoc will also b @viedoc.com Add another email ad Add another email ad Phone number 4612345678 This phone can rec Contact information Please keep your contact info Street address	n Image: Set as primary   set as primary Delete   n Image: Verify email address   image: Set as primary Image: Delete   Image: Set as primary Image: Delete </td

## 2.1 Adding a secondary email address

To add a new (secondary) email address to your account:

- 1 Select Add another email address link (8) next to the current primary email address.
- 2 Enter the email address in the new field under Secondary email addresses.
- 3 Select **Save changes**. A notification email is sent to both the primary email address and to the newly added email address to inform you about the change. At the top of the **Edit your profile** dialog box, you will see a warning message saying that the newly entered email address is not verified (13).

### 2.2 Verifying a secondary email address

To verify a secondary email address:

1 Select the Verify email (7) link next to the newly added email address. A six-digit code will be sent to your new email address and a Verify ownership dialog box is displayed asking you to provide the code in order to verify the new email address.

Notel The verification link for the secondary email address is shown only after having saved the changes you may have performed on the other fields on the same page.

2 Enter the received code and select **Confirm**. The newly added secondary email address is now verified.

### 2.3 Changing the primary email address

To change the primary address to one of the existing secondary email addresses:

- 1 Select **Set as primary (5)** next to the secondary email address that is to be set as the primary email address.
- 2 Select **Save changes**. A notification email will be sent to both email addresses to inform you about the change. You will use the new primary email address the next time you log in to Viedoc.

Notel For a secondary email address to be able to be set as primary, it has to be verified first.

## 2.4 Editing your phone number

To edit your phone number:

- 1 Enter the number in the **Phone number** field in the format +[CountryCodePhoneNumber] (for example: +46123456789).
- 2 Select **Save changes**. A notification email will be sent to your primary email address to inform you about the change.

### 2.5 Verifying your phone number

To verify your phone number:

- 1 Make sure that the phone number is correctly entered and that the **Phone can receive text messages** option is selected.
- 2 Select the Verify phone number link. A six-digit code will be sent as a text message to your phone and a Verify ownership dialog box is displayed. It will ask you to provide the code in order to verify the phone number.
- 3 Enter the code and select **Confirm**. The phone number is now verified.

## 3

## Study access management

From the settings button (wheel) you can perform all actions related to study access management in Access Settings.

vieuoc					
					Edit your profile
Welcome bac	k Doctor Der	no!			Change Password
					Security Settings
Access		Account		Recent activities	Access Settings
Studies	Sites	Last login	5.days.ago	Study Rachel's study site Site1 added to my studies	Log out
4	0	Number of logins	5	Password changed	cog our
1	0	User level	8 Rookie		
		Active since	2023-10-05		
		Active since	2023-10-05		

## 4 Access settings

Select the settings button (wheel) in the top right corner of the window, and select Access settings.

### 4.1 Study membership

Access Settings			Clo
			Rookie 9 logins
1 roles in 1 studies			
A Demo St	udy		
Site name	Role	Since (UTC)	
Stockholm	Site Manager	2018-05-04 11:45	Ē
how login history			

The following information is provided, grouped by study:

- Site name
- Role
- Since (UTC) the date and time when the membership was approved, in Coordinated Universal Time (UTC)

For users with organization roles, these are listed in the top of the page, in a separate section, providing the following information:

- Organization name
- Role

1

2

• Since (UTC) - the date and time when the membership was approved, in UTC

### 4.2 Deleting study access

To remove yourself from a certain role within a study:

Select the trash can icon on the right, corresponding to the role, site and study to be removed from:

2 roles in 2 studies			
A Demo Study			
Site name	Role	Since (UTC)	
Stockholm	Site Manager	2018-05-04 11:45	Ē

A confirmation dialog is displayed.

Confirm	remove	Ck
Ê	Remove role: Site Manager	
	Study site: Stockholm Study: A Demo Study	

Cancel

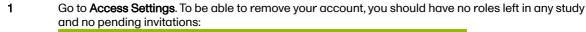
Delete

A notification email will be sent to all the Study managers, or to the Site managers if any roles are delegated.

## 4.3 Deleting your Viedoc account

You can remove your Viedoc account when you have no study memberships left, that is, 0 roles in 0 studies.

To delete your Viedoc account:



		Rookii 11 logins
0 roles in 0 studies		
data related to your account, bu	Remove account from Viedoc Viedoc' if you wish to remove your account from Vie ut for identification purposes, Viedoc will keep the I all studies you have participated in are deleted. All account will be removed from the system.	User ID, display name, primary emai
ow login history		

2 Select **Remove account from Viedoc**. You will be prompted to confirm the account removal by entering your password:

Confirm a	account removal	Close
Ê	Confirm with your password Delete Cancel	

3 Enter your password and select **Delete**. A confirmation message is displayed and a notification email will be sent to your primary email address:

Thank you and goodbye!

Your account is now removed from Viedoc

For identification purposes, Viedoc will keep: the user ID, display name, primary email address, and login history. They are kept until all the studies you have participated in are deleted. All other information related to your account will be removed from Viedoc.

## 5 Pending invitations

In case you have study invitations that you have not accepted or rejected yet, the **Pending invitations** window displays a list of all your pending study invitations:

¢	Pending invitations	Close
[	Demo user	
	Granted membership - 2 waiting for your approval By confirming access to the study I also approve that the organization handling my account can see my account information.	
	A Demo Study Reference Data Source Manager	t
	A Demo Study All sites / Site Manager	

### 5.1 Approving a study invitation

To accept a study invitation, select **Approve** next to the respective study role. If this is the first role you have in the respective study, and if the study requires an activation password, you will be prompted to enter it:

Activatio	n password required	Close
Ê	Activation password	
	Please contact your stu the activation passwore	idy manager if you don't have I.
	Confirm	Cancel

Notel All the pending role invitations for a user are automatically approved when the Application Programming Interface (<u>API</u>) method GetToken / Token is used.

### 5.2 Rejecting a study invitation

To reject a study invitation, select **Reject** next to the respective study role. The invitation will be removed from the Pending invitations list.

### 5.3 Postponing the approval/rejection of a study invitation

To postpone the approval or rejection of study invitations, select **Close** in the top right corner of the **Pending invitations** dialog box and postpone providing an answer to the study invitation. To access the pending invitations again, the **Pending invitations** dialog box is shown:

- Automatically, after logging in.
- By selecting Pending invitations on top of the landing page.

## 6 Logging out

From Viedoc you can log out from different locations:

viedoc					Doctor Demo
					Edit your profile
Welcome back	Doctor De	emo!			Change Password
					Security Settings
Access		Account		Recent activities	Access Settings
Studies	Sites	Last login	S.daya.ago	Study Rechel's study site Site1 added to my studies	Log out
4	0	Number of logins	5	Password changed	
1	0	User level	🐺 Rookie		
		Active since	2023-10-05		

• To log out from settings, select the settings button (wheel) in the top right corner of the window, and select **Log out**. Use this link every time you leave the application from this location.

Note! If you exit the system without logging out, any subject you are currently working with will be locked for other users. After 5 minutes, the subject will be automatically unlocked.

To log out from User Settings, Security Settings, Change password or Authentication Log: select your avatar on the top right hand side and select Log out.

doc		<ul> <li>Doctor Dem</li> </ul>
Jser Settings	User Settings	Rooter Doctor Demo
Change Password Security Settings	Ownership of +4612345678 has not been verified!	Log out
Authentication Log	User name The is used billing in to Version doctor/demograyWaldoo.com	
edoc learning #		
	First name Last name	
	Doctor Demo	
	Display name The a year Video caar name Doctor Demo	
	System language The torgange will be used when overlable English	
	Primary emoil address accturaterroquivedoc.com	
	Phone number       +40234678       This phone can receive text messages	
	Contact information Prove lengingua contact references to date	
	Street address City Postal code	
	Country State Salket country	
	- 0. Vectors: Technologies AD 2023 - Termine of user - Physical Vectors <sup>244</sup> entrones AT //REXTMAD2 - 2023-95-95 (2) 42 22 UT Vectors <sup>244</sup> entrones AT //REXTMAD2 - 2023-95-95 (2) 42 22 UT	niev



#### Overview of the landing page

## Overview of the landing page

Published by Viedoc System 2024-10-10

### This lesson describes the landing page, which is displayed directly after a successful log in:

:55					Admin Design
		Account		Recent activities	
Studies	Sites	Last login	6 minutes ago	Study Medical coding site Site 2 demo added to my studies	6.day
1	1	Number of logins	12	Study Medical coding site 2 demo added to my studies	5.day
1	1	User level	🥮 Rookie	Study Medical coding site Site 2 demo added to my studies	6.day
		Active since	2022-08-31	Study Medical coding site Site 2 demo added to my studies	6.day
ch		<u>٨</u>			
CONTRACTOR OF THE OWNER OF THE OWNER	A DESCRIPTION OF TAXABLE PARTY.	The second s			
Medical coding		and the second second second			
1 site	П				
	(57				
	Start new s				
	Start new s	tudy			
0% complete				化磷酸盐酸 法非法定 化化磷酸盐酸 法非行为 医水杨酮酸 化非构成 化化磷酸酶	· 推进:把以上在 计 建塑料 推进上程 这一位

The landing page provides the following summary information:

- Access
- Studies the total number of studies you have access to
- Sites the total number of production sites you have access to
- Account
  - Last login the time passed since the last time you have logged in to Viedoc
  - Number of logins the total numbers of logins to Viedoc since you activated your account
  - User level the number of logins by a user, giving an indication of how experienced the user is in using Viedoc

Skill level	lcon	Description
Rookie		≤ 20 logins
Semi-pro		21-100 logins
Pro		101-1000 logins

Skill level	lcon	Description
Legend	<u>.</u>	> 1000 logins

- Active since the date when you activated your Viedoc account
- Recent activities a short summary of the most recent four activities, such as last password change and being assigned a role within a new site

The study slider shows the studies you have access to - each study is represented by a study logo. If you have access to many studies, you can easily find a specific study by entering the study name in the search field. All studies containing characters of the search string appear in the search results.



A progress bar is shown below each study logo. The percentage displayed is calculated by the mean completion of each subject (rounded down). Thus, it measures the total completion of the study.

#### Notel

- Only production sites are included in the calculation.
- Deleted subjects are not included in the calculation.
- If the expected number of subjects is not set in Viedoc Admin > Study Settings, then 0% will be displayed.

Click on a study logo to select a study to work with. The study start page is loaded on the bottom-half of the screen, see <u>Study start page</u>.

If you are an Administrator and/or Designer you will also have access to Viedoc Admin and Viedoc Designer. Click the respective icon at the top right corner of the landing page:

viedoc				<u>ن</u>
Welcome bac	:k	Account	Recent activities	<b>D</b> Designer
Studies	Sites	Last login <u>6 minutes ago</u>	Study Medical coding site Site 2 demo added to my studies	6 days ago
1	1	Number of logins 12 User level Rookie	Study Medical coding site Site 2 demo added to my studies	6.days.ago
±		User level Bookie Active since 2022-08-31	Study Medical coding site Site 2 demo added to my studies Study Medical coding site Site 2 demo added to my studies	6 days ago 6 days ago
		7/Live since 2022-00-31	study meakar county site site 2 demo added to my studies	9.uays.ayo
Search	٩			
Medical coding 1 site	G Start new study			



Approving eCRF changes

## Approving eCRF changes

Published by Viedoc System 2021-11-24

1. Introduction2. How a change is flagged and how to approve3. What happens if I don't do anything?4. Who can approve?

## 1 Introduction

Changes to the electronic Case Report Form (<u>eCRF</u>) can occur during the course of a study. Normally this is due to an amendment. The definition of an amendment is that it is a change in the protocol from a specific time-point. This means that already saved forms and events should not be affected by the amendment.

Sometimes there is however a need to change the structure/content of already saved forms and events, for example when there is an error in the configuration (a missed question, a spelling error, and so on). For these changes to be applied on already saved data, a confirmation is needed from the site staff.

## 2 How a change is flagged and how to approve

Whenever there is a change to the structure of the form(s), a message will appear on the <u>study start page</u>, in the Messages pane on the right side, for the site to acknowledge:

#### Messages

- A change to the structure of one or more forms on Karolinska University Hospital has been request... less than a minute ago by Demo User
- Consider changing your password. Your password will expire in 1 days. To change password, selec...
   <u>6 months ago</u> by System

By clicking on the message, a detailed text is shown, that summarizes the changes to the <u>eCRF</u> as entered by the Study Manager.

An approval is needed before the saved forms will be upgraded to the new version, for those types of changes that potentially affect data integrity, such as form names, field labels, instructions text, and so on.

The changes that do not affect data integrity, such as field length, number of decimals, and so on, are automatically applied and the confirmation from the site staff is not required.

The forms affected by the upgrade are marked with an issue flag (the red **[i]** icon). A summary of the affected forms can be viewed in the Selection page, by selecting the **ISSUES** view and filtering from the drop-down list in the upper right corner by **Form upgrade pending**:

Viedoc 📌 🙃 A Derr	no Study		Demo User 🛛 Int	estigator 🐹 🙆 🔅 -
Le Selection				<b>2</b> +
Search	30 CARDS 2 ISSUE	2	Show all sites	Form upgrade pending 🔹
ID åt	REFERENCE 41	ISSUE DETAIL 41	CONFIRMATION 41	STATE 41
SE-Uppsala:2-016	Lab repeating Hematology CBC CBC LAB Results (Hematology)	Pending form upgrade Demo User 16 Oct 2018 17:47 CEST		Pending form upgrade
SE-Uppsala:2-016	Visit 1 [New act] CBC LAB Results (Hematology)	Pending form upgrade Demo User 16 Oct 2018 17:46 CEST		Pending form upgrade

By clicking on each of the forms in the list, the respective form is open, highlighting that a change to the structure of the form was performed and you need to edit the form to load the new structure and review the data:

2	SE-Uppsala:2-016 🔹	15 Oct 2018 00:00	· · · · · · · · · · · · · · · · · · ·	Edit Close			
4	A change to the structure of this form is pending your review and approval. Click edit to load the new structure and review the data previously entered. Make any changes necessary and then save the form.						
C	CBC LAB Resul	lts (Hematology)	DM CRA SDV 🔒 i	SHOW HISTORY 1			
	lso possible to batch app ade message pane:	prove all affected forms at on	ice by typing in your password	l and clicking <b>Confirm</b> in the			
A cha	Demo User <u>4 minutes ago</u> nge to the structure of one or more	forms on Karolinska University Hospital ha	s been requested by the study team. The cha	nge(s) will impact forms that are already			

entered and these changes are pending your review and approval.

A summary of the changes can be found below:	message to sites, entered by Study Manager,
Update on the SAE form.	describing the changes performed to the eCRF.

All subjects and forms that are affected by the change are marked as having an issue

There are two ways to approach this:

Approve each affected form by opening them individually and follow the instructions

Approve all affected forms at once by signing off below.

If Karolinska University Hospital did not have any subjects at the time this message was received you can ignore this message.

I hereby approve the application of these changes to my site.		
Password	Confirm	

A recommended approach is to manually upgrade a few forms to fully understand the potential impact of the upgrade and then upgrade the rest using the batch approval feature.

Important! If a change is applied before previous one(s) being approved, then the approval will upgrade affected forms to the latest applied version, regardless which of the upgrades the site user approves, and regardless of the approval method (described above) used.

## 3 What happens if I don't do anything?

If no confirmation is given:

4

- The forms will keep the old version, if the changes potentially affect data integrity such as form names, field labels, instructions text, and so on. There will however still be an issue flag indicating that there is a pending upgrade to the form.
- The forms will be automatically updated, if the changes do not affect data integrity such as field length, number of decimals, and so on. No approval from the site staff is required.

Any site user with data edit permission can approve the changes. Once confirmed, the date and name of the user who approved will be displayed in the message.

Important! The upgrade is not being performed for:

- Locked forms (locked by Monitor, Data Manager, or any user who has data lock permission).
- Forms for which the approving user does not have view/edit permission.

If performing batch approval and forms affected by the upgrade are skipped, as a result of one of the above mentioned scenarios, a new message will be displayed in the Message pane. The changes can then be approved after a user with permission unlocks the locked forms.



What's new in the latest release?

## What's new in the latest release?

Published by Viedoc System 2024-12-03

1. What's new in the latest release?



## What's new in the latest release?

Detailed information on changes in the current release, the release schedule and notes from previous releases can be found in the release notes on the Viedoc website here:

https://www.viedoc.com/support/release-notes/

For more information on future releases, please contact your Viedoc representative.



#### **Known limitations**

## **Known limitations**

Published by Viedoc System 2025-02-18

**1. Viedoc Clinic** 1.1 CSV export 1.2 Data export 1.3 Data review 1.4 Edit/enter data 1.5 File upload 1.6 Issues and task 1.7 Medical coding 1.8 Metrics 1.9 PDF export 1.10 Selection page 2. Viedoc Admin 2.11 Apply revision 2.12 Data import 2.13 ODM import/export 2.14 User management **3. Viedoc Designer** 3.15 Alerts 3.16 Edit checks 3.17 Form and workflow PDF 3.18 Item settings 3.19 JavaScript 3.20 Roles and permissions 3.21 Study workflow 3.22 Validation of study design 3.23 Visibility conditions 4. Viedoc API 5. Viedoc Me 6. Viedoc Logistics 7. Viedoc Reports 8. Viedoc TMF



## Viedoc Clinic

### 1.1 CSV export

- The export to CSV fails if the same OID was used in Viedoc Designer in different design versions with different casing (for example, an OID defined as AE in design version 1 and AE in design version 2).
  - Labels are truncated to 200 characters when CSV data is imported to SAS using the CSV2SAS macro.
- The Excel/CSV export does not include items set to "Hide Always" in visibility conditions when a single form is selected for export.

### 1.2 Data export

 The export preview is not working with Safari running on Windows OS or older Safari versions running on Mac OSX.

### 1.3 Data review

- Queries of the type "Required value missing" responded with "Confirmed as missing" and cannot be rejected by the sponsor side.
- A field that is required for SDV but is hidden on a form (due to, for example, visibility conditions) can normally not be marked as having been verified by SDV. Yet, if the entire form is marked as having been

## 1.4 Edit/enter data

- For scheduled and unscheduled events, when the event date form (\$EVENT) is excluded when you use automatic event dates, it still counts. In the signing console the counter (number of forms) for a event includes the \$EVENT form. It cannot be selected to be signed but can be signed if you select sign all (for subject or event). If you sign forms on an event individually you will not be able to sign the \$EVENT form. This in turn makes it so that the sign symbol that appears on the event when everything is signed does not appear, even though it looks like everything is signed.
- When populating numeric fields using functions and reference data, they automatically receive the number of decimals configured in the design.
- It is not possible to delete unscheduled events if automatic event dates are enabled.

### 1.5 File upload

- For security reasons, uploading executable files is not allowed. The complete list of unsupported file types can be found in the Viedoc 4.34 Release Notes.
- The upload of password-protected zip files is not supported, as Viedoc is not able to scan these files for viruses.

### 1.6 Issues and task

• The Issue list will not be visible for sites that have more than 1000 subjects.

### 1.7 Medical coding

- The Medical coding console is not working with Safari running on Windows OS or older Safari versions running on Mac OS X.
- The MedDRA Chinese translation version 26.0 and onwards has the term 牙开. This term will be displayed as 牙开 in the Viedoc system, as the last character is not supported.

### 1.8 Metrics

• The number of open queries differs between the Queries page and the Performance page. The Performance page also includes queries with the state "Removed".

### 1.9 PDF export

- Visit date form history will not be included in PDF export if no forms were filled in, or if forms were initiated from Viedoc Me.
- When using Windows 7, file names added to the zip archive during PDF export get scrambled when they contain Unicode characters. The extracted file content is not affected by this. There is a Hotfix forWindows 7 available at: https://support.microsoft.com/en-us/kb/2704299 that addresses this issue.
- PDFs generated upon form save in Viedoc versions prior to 4.51 were generated and stored based on the
  role visibility conditions applied to the user that last saved the form. Items that were hidden to the user
  due to role visibility conditions are not shown/included in such generated PDFs.
- Fully PDF/A compliant archives are only supported if all the included form PDFs and study event PDFs
  were generated on, or, after 2017-03-10 (Viedoc 4.33). It is still possible to generate PDF/A compliant
  archives that contain form and study event PDFs generated before this date, but you might receive
  warning messages related to PDF transparency issues.
- In the PDF/A export output, the header, footer, and the text on the respective Contents page are missing for the deleted forms/events/subjects.
- In the PDF export output, each event should have a Contents section. The Contents list can in some scenarios be truncated and not show everything for the event.

### 1.10 Selection page

- The descending sorting in the subject list view is not working properly.
- When clicking to sort a column containing dates in the subject list view, Viedoc sorts all dates using a numeric variant of US date representation (for example, 1977-NOV-16 comes before 1967-DEC-16 because the first is sorted like 11/16/1977 and the latter is sorted like 12/16/1967).
- The event overview page is not working with Safari running on Windows OS or older Safari versions running on Mac OSX.

We no longer support SMS notifications in the following countries:

- +7 Russia
- +92 Pakistan
- +994 Azerbaijan
- +967 Yemen

### 2.1 Apply revision

• The affected forms count shown in Viedoc Admin while applying a study design revision is implemented only for production sites. Demo/Training site forms are not included in this count.

### 2.2 Data import

 It is only possible to import values (choice numbers), not strings (choice labels), when importing data into data fields where multiple checkboxes can be checked.

## 2.3 ODM import/export

- It is not possible to import an ODM file that was exported from Viedoc including the Event Dates into Viedoc Admin.
- The following error message is displayed: "An item with the same key has already been added".
- Only one (selected) design can be imported from each CDISC ODM file.
- ODM export fails when subject data contains large, uploaded files.

### 2.4 User management

- Any of the Organization Administrator, Organization Designer, and Site Manager roles that were removed from a user are not listed in Viedoc Admin, under User Settings > Studies and Roles.
- When sorting studies by group and generating a "User and Roles" or "User Administration Log" report, the Download link is not exposed for the newly generated file until the page is refreshed.
- API configuration: After creating new and editing existing Web API clients, it is not possible to save the setup unless the user system language is set to English or German.

## 3 Viedoc Designer

### 3.1 Alerts

 If the condition for an alert is set within a form for which the option to auto-update functions is enabled, and the alert is triggered, the alert message will be sent twice.

### 3.2 Edit checks

- Edit checks are not triggered on dates when the event date is used as default value, and the calendar picker is used to choose the date.
- Using \$THIS inside a form to refer to an item within a different instance of the same form, does not
  work, as it always refers to the same form instance. This is true when referring to an item in the same
  form within another activity, or when referring to another form instance within the same activity
  (applicable for repeating forms).
- If two scheduled events have the same event date, and both events contain a form with a function or datacheck that uses the \$PREV function, the \$PREV functions in these two events refer to each other as the previous event, and not to the event that occurred earlier in the study workfl ow. This creates a circular reference and makes it impossible to refer to earlier event(s).

## 3.3 Form and workflow PDF

- If, in the Study Workflow, there are more activities with the same activity name within the same event, then the forms in these activities are incorrectly displayed in the Bookmarks list in the study workflow PDF. Please note that only the Bookmarks list is affected, the events/activities/forms are correctly displayed within the document.
- The PDFs generated as Empty CRFs will not display all code list items for radio buttons, drop-down lists and checkboxes if these have been configured with many code list items in a vertical layout.

## 3.4 Item settings

• For the code list items (checkboxes, radio buttons, dropdown), it is possible to set the same code list values for multiple choices within the same item. This is not recommended. Unique code list values

should be used for each of the choices within the same item.

### 3.5 JavaScript

• The setMonth function with negative values is not supported. The date is not saved into the system correctly when the function is run on the server-side.

### 3.6 Roles and permissions

 If the role that has the permission for Emergency unblinding also has a role visibility condition that makes the blinded outcome hidden for this role, the outcome gets hidden for all roles after unblinding, and not just for the role specified in Viedoc Designer.

### 3.7 Study workflow

 When the Event ID for the Study Start event contains the word "START", including combinations with other words and punctuation, and scheduling other events based on the Study Start event, this results in an error. The workaround is to use a different ID for the Study Start event, one that doesn't contain the word"START".

### 3.8 Validation of study design

 Validation of alerts, selection view settings, event visibility, subject status condition, common event summary format and subject ID generation settings for deleted items is not performed.

### 3.9 Visibility conditions

 When creating forms for Viedoc Me, visibility conditions can only include variables that have already been introduced, and that are in the same form and on the same page. This behavior differs from the one in forms for Viedoc Clinic.

## 4 Viedoc API

- The API method SubmitData allows submitting data into a form that exists in the effective design but does not exist within the respective event according to the study workflow. In such a case, a new form is created and added to the event.
- When using the WCF API to push data into forms, if there are items that have functions setup to calculate
  data from other items, or item groups, those calculations will not be automatically updated. However, if
  an item that relies on a function is added to the same item group it relies on, it will perform the
  calculation.

## 5 Viedoc Me

- If additional languages are imported (to be used in Viedoc Me) and after that code lists are combined via "Formats" (for example for SAS export) then the imported languages are lost. The workaround is to import the languages again after the code lists have been combined.
- For Viedoc Me translations, if any of the translated values in the file to be imported is a number, the file import fails without prompting any feedback to the end user. The workaround is to remove the numbers from the columns in the translated file that correspond to the translated content before importing the file in Viedoc Designer (the numeric values will be kept in the original English version and will be displayed as such in the translated Viedoc Me form).
- Viedoc Me does not support forms with form link items.
- The PDF export containing form PDFs submitted from the new Viedoc Me application in Japanese Kanji will not be generated correctly if embedded fonts are included.
- Long option labels for radio buttons and check boxes do not have line breaks.
- Sharing the Viedoc Me access details via text message does not work for studies that are running on the Viedoc China instance.
- In Viedoc Clinic, when activating a Viedoc Me account, there is the option of sharing the access details
  via a PDF file. This PDF file is translated to the supported system languages <u>only</u>, and not to all supported
  Viedoc Me languages. This is also applicable to the test email and test text message that are used solely
  to verify the subject's contact information, and not to verify the selected Viedoc Me language.

## Viedoc Logistics

6

• In the exported stock list, the audit trail shows one row for the create action for older kits. For more recently uploaded kits, the audit trail shows two rows for the create action.

## 7 Viedoc Reports

- There are some graphical limitations of the interface on mobile devices.
- Variables/fields that have an output field ID defined will be identified with this ID in the Data Browser and Reports pages, whereas they will be identified with field ID in the Dashboard, Demographics, and AE pages.
- The Overdue Events Report does not include any Viedoc Me events. Events without a proposed date are
  not included in this report. Events that have been planned or initiated are not included in this report, even
  if the planned/initiated event is outside of the event window.

## 8 Viedoc TMF

- Viedoc TMF is only running in Production mode.
- For security reasons, the document preview in the Trial Master File view does not support ActiveX components.
- The search for document content is disabled on the training server.
- Viedoc TMF does not work on Safari 16.3 and later versions.



Glossary

## Glossary

Published by Viedoc System 2025-02-18

This glossary contains common terms and acronyms found in the eLearning. They are sorted in alphabetical order by the full term (not by abbreviation).

## ABCDEFGHIJKLMNOPQRSTUVWXYZ

Term	Abbreviation	Definition
Δ		·
Active Pharmaceutical Ingredient	API	The ingredient in a pharmaceutical drug or pesticide that is biologically active.
Adverse Event	AE	Any unwanted effect caused by the administration of drugs. The onset of an adverse event may be sudden or develop over time.
Anatomic Therapeutic Chemical classification system	ATC	A drug classification system that classifies the active ingredient of drugs according to the organ or system on which they act and their therapeutic, pharmacological and chemical properties.
Application Programming Interface	API	A set of routines, protocols, and tools for building software applications that specifies how software components should interact.
Attributable, Legible, Contemporaneous, Original, Accurate	ALCOA+	The principles of data integrity. The plus sign denotes the four additions: Complete, Consistent, Enduring, and Available.
Audit trail		An audit trail (or audit log) is a security-relevant chronological record, set of records, or destination and source of records that provide documentary evidence of the sequence of activities that have affected at any time a specific operation, procedure, or event. The records are of importance for the clinical study, as specified by applicable international standards (from the FDA and EMEA).
B		
<u>C</u>		
Case Report Form	CRF	A printed, optical, or electronic document designed to record all protocol-required information on each study subject.
The China Personal Information Protection Law	PIPL	The data privacy law in China, targeted at personal information protection.
Clinical Data Acquisition Standards Harmonization	CDASH	A standard developed by CDISC that provides guidance to develop the CRF.

Term	Abbreviation	Definition
Clinical Data Interchange Standards Consortium	CDISC	A global, open, multidisciplinary, non-profit organization that has established standards to support the acquisition, exchange, submission and archive of clinical research data and metadata.
Clinical Data Interchange Standards Consortium Define Extensible Markup Language	CDISC Define-XML	A metadata format defined by CDISC that is sent with every study in each submission, which tells the regulatory authorities what datasets, variables, controlled terms, and other specified metadata were used.
Clinic role		User roles in Viedoc that give access to Viedoc Clinic, such as Investigators, Monitors, and Data Managers.The clinic roles are study-specific. These roles, and the rights that belong to these roles, can be defined in Viedoc Designer. Each study can have an unlimited number of clinic roles.
Clinical data manager		Responsible for the management of the data in the clinical trial. Assists in protocol development and database selection and configuration.
Clinical Research Associate	CRA	A person employed by the sponsor, or by a CRO, acting on a sponsor's behalf, who handles most of the administrative responsibilities of a clinical trial, acts as a liaison between investigative site and sponsor, monitors the progress of the investigator's sites participating in a clinical study, and reviews all data and records before a monitor's visit.
Clinical Review	CR	A clinical review gives the Monitor the possibility to mark forms as reviewed.
Clinical Trial Management System	CTMS	A Clinical Trial Management System is a software system used by biotechnology and pharmaceutical industries to manage clinical trials in clinical research. The system maintains and manages planning, performing and reporting functions, along with participant contact information, tracking deadlines and milestones.
Code of Federal Regulations	CFR	The codification of the general and permanent rules and regulations by the executive departments and agencies of the U.S. federal government.
Comma-Separated Values	CSV	A set of database rows and columns stored in a text file such that the rows are separated by a new line while the columns are separated by a semicolon or a comma.
Common event		An event that occurs separately or parallel to the workflow, for example concomitant medication, adverse event, medical history, dose adjustments, and daily compliance reporting.
Computerized Systems Used In Clinical Investigations	CSUCI	A guidance document established by the FDA intended to assist in ensuring confidence in the reliability, quality, and integrity of electronic source data and source documentation (that is, electronic records).
Concomitant Medication	СМ	Drugs given to a patient at the same time, or almost at the same time, as the drug under study.
Contract Research Organization	CRO	A company that contracts with the sponsor to perform one or more of the sponsor's duties in a trial.
Coordinated Universal Time	UTC	The primary time standard by which the world regulates clocks and time. Viedoc stores all timestamps in UTC. In the cases when a time zone can be established (for example a specific site scope is selected), the timestamp is displayed with the time zone applied.

Term	Abbreviation	Definition
D		
Data Manager	DM	A user role in Viedoc with permission to lock and export data into different formats, view reports and metrics, and add pre- queries.
Demo mode		A mode in Viedoc specifically used for demonstrations and training new Viedoc users. No real data should ever be entered in Demo mode.
Designer		A user role in Viedoc that can create the setup (design) of the study in Viedoc Designer.
Dictionary Manager		A user role in Viedoc with permission to upload medical coding dictionaries.
Drug Information Association	DIA	A global forum for those involved in healthcare product development and lifecycle management to exchange knowledge and collaborate.
E		
Edit checks		A check of the data that verifies whether the data entered into the form are within a certain range that is specified in Viedoc Designer. If the entered data are outside the specified range, the system will automatically display a message that is defined under Query Message.
Electronic Case Report Form	eCRF	An electronic document designed to record all protocol- required information on each study subject.
Electronic Common Technical Document	eCTD	A standard format for submitting applications, amendments, supplements, and reports to the FDA.
Electronic Data Capture	EDC	The use of computerized systems to collect clinical trial data in electronic form as opposed to paper form.
Electronic Investigator Site File	elSF	The digital version of the minimum list of essential documents that a study site needs to maintain throughout a clinical trial. Included documents could be: Clinical Study Protocol, Investigator Brochure, Informed Consent, CVs etc.
Electronic Patient Reported Outcome	ePRO	A patient-reported outcome that is collected by electronic methods. Viedoc Me is the ePRO solution of Viedoc.
Electronic Trial Master File	eTMF	A type of content management system with a collection of essential documents which allows the conduct of a clinical trial to be reconstructed and evaluated.
eTMF Manager		A user role in Viedoc that has permission to manage the eTMF application in Viedoc Admin. The eTMF Manager maps Viedoc Clinic roles to eTMF roles. The eTMF Manager also has permission to manage the eTMF structure in Viedoc eTMF.
Event		A moment when the patient visits or contacts the clinic, or initiates an event through the Viedoc ePRO application Viedoc Me, and data are recorded.
European Medicines Agency	EMA	A decentralised agency of the European Union (EU) that is responsible for the scientific evaluation, supervision, and safety monitoring of medicines developed by pharmaceutical companies for use in the EU.

Term	Abbreviation	Definition
European Medicines Agency Good Clinical Practice Inspectors Working Group	EMA GCP IWG	The EMA GCP Inspectors Working Group focuses on harmonisation and co-ordination of GCP related activities at Community level. It is involved in the preparation of new and revised guidance on GCP and community procedures relating to inspection.
Exchange Mechanism Standard	EMS	The exchange mechanism standard is a model for transferring eTMF data between sponsors, CROs, other stakeholders, and vendor systems.
Extensible Markup Language	XML	A markup language that defines a set of rules for encoding documents in a format that is both human-readable and machine-readable.
E		
Food and Drug Administration	FDA	An agency of the U.S. federal government's Department of Health and Human Services that ensures the safety of foods, pharmaceuticals and other products.
G		
General Data Protection Regulation	GDPR	A regulation in the European Union (EU) law on data protection and privacy in the EU and the European Economic Area (EEA). Primarily aimed to give control to individuals over their personal data and to simplify the regulatory environment for international business by unifying the regulation within the EU.
Good Automated Manufacturing Practice	GAMP	A subcommittee of, and a series of good practice guides on drug manufacturing published by, the International Society for Pharmaceutical Engineering.
	GAMP5	The last major revision of the GAMP Guide for Validation of Automated Systems in Pharmaceutical Manufacture, released in February 2008.
Good Clinical Practice	GCP	A standard for the design, conduct, performance, monitoring, auditing, recording, analyses, and reporting of clinical trials that provides assurance that the data and reported results are credible, accurate, and that the rights, integrity, and confidentiality of trial subjects are protected.
Good Manufacturing Practice	GMP	The manufacturing guidelines recommended by the relevant agencies.
Globally Unique Identifier	GUID	A unique key containing numbers and letters that identifies the study.
H		
Health Insurance Portability and Accountability Act	HIPAA	A Privacy Rule that is the first comprehensive Federal protection for the privacy of personal health information. Research organizations and researchers may or may not be covered by the HIPAA Privacy Rule.
Hyper Text Markup Language	HTML	The standard markup language for documents designed to be displayed in a web browser.
L		
Identity Provider	ldP	A system entity that creates, maintains, and manages identity information.

Term	Abbreviation	Definition
Independent Ethics Committee	IEC	An institutional review board (IRB).
Input factors		When used in randomization: Prognostic factors that might influence the effect of treatment on the subjects.
Institutional Review Board	IRB	Committee(s) made up of experts and community representatives who review and approve clinical trials to make certain that they fulfill stringent ethical standards to protect subjects' rights as participants in an experiment.
International Council for Harmonisation of Technical Requirements for Pharmaceuticals for Human Use	ICH	An initiative that brings together regulatory authorities and pharmaceutical industry to discuss scientific and technical aspects of pharmaceutical product development and registration.
International Organization for Standardization	ISO	An organization promoting worldwide proprietary, industrial, and commercial standards.
Investigational Medicinal Product	IMP	A medicine for research.
Investigational Product	IP	A preventative (vaccine), a therapeutic (drug or biologic), device, diagnostic, or palliative used in a clinical trial. Also abbreviated IMP (Investigational Medicinal Product) and IMD (Investigational Medical Device).
Investigator Site File	ISF	The minimum list of essential documents that a study site needs to maintain throughout a clinical trial. Included documents could be Clinical Study Protocol, Investigator Brochure, Informed Consent, CVs etc.
Iyakuhinmei Data File	IDF	A medical coding dictionary used for coding clinical and drug safety data and for reporting safety data to the Japanese Pharmaceuticals and Medical Devices Agency (PMDA).
<u>J</u>		
Japanese Pharmaceuticals and Medical Devices Agency	PMDA	PMDA (Pharmaceuticals and Medical Devices Agency) is a Japanese regulatory agency, working together with Ministry of Health, Labour and Welfare. Their obligation is to protect the public health by assuring safety, efficacy and quality of pharmaceuticals and medical devices.
JavaScript	JS	A scripting language, primarily used on the web. It is used to enhance HTML pages and is commonly found embedded in HTML code. Viedoc is using JS to define advanced edit checks, expressions, and comparisons.
K		
Key Risk Indicator	KRI	In Viedoc Reports, the Key Risk Indicators are the measurement of unfavorable events that can adversely impact a study, and are measured by site.
L		
Linking form		A linking form is a form that contains a link to refer to another form. There can be one or more instances of the linked form.
Linked form		A linked form is a form that is linked to from another form (a linking form).

Term	Abbreviation	Definition
M		
Medical coding		The process of translating reported events like Adverse Events, Medical History and Concomitant Medications in a universal code according to a medical coding dictionary.
Medical Dictionary for Regulatory Activities	MedDRA	A medical coding dictionary developed by the Maintenance and Support Services Organization (MSSO). MedDRA is supported by ICH.
N	8	9
National Medical Products Administration	NMPA	The Chinese agency for regulating drugs and medical devices.
<u>0</u>	-	
Object Identifier	OID	An identifier mechanism for naming any object, concept, or "thing" with a globally unambiguous persistent name.
Operational Data Model	ODM	A standard for electronic clinical data as defined by CDISC. The highlights of ODM include audit trail, utilization of XML technology, and machine-readable and human-readable data. All information is independent of databases, and storage of ODM is independent of hardware and software.
Output factors		When used in randomization: the result after a patient has been randomized, that is, the treatment group or kit number (in case of a blinded output) that the patient is assigned to.
P	-	1
Patient Reported Outcome	PRO	A health outcome directly reported by the patient who experienced it.
Portable Document Format Archive	PDF/A	An ISO-standardized version of the PDF specialized for use in the archiving and long-term preservation of electronic documents.
Post Marketing Surveillance	PMS	The practice of monitoring the safety of a pharmaceutical drug or device after it has been released on the market and an important part of the science of pharmacovigilance. Viedoc PMS is Viedoc's electronic data capture solution developed especially for post-marketing surveillance studies.
Q		
Quality Control	QC	The operational technique and activities undertaken within the quality assurance system to verify that the requirements for quality of the trial are met.
B		
Randomization		A method based on chance by which study participants are assigned to a treatment group. Randomization minimizes the difference among groups by equally distributing people with particular characteristics among all the trial arms.
Randomization and Trial Supply Management	RTSM	A system that unifies the randomization, allocation, and supply management in a clinical trial.

Term	Abbreviation	Definition
Representational State Transfer	REST	A REST API (also known as RESTful API) is an application programming interface (API or web API) that conforms to the constraints of REST architectural style and allows for interaction with RESTful web services.
<u>S</u>		
Scheduled event		Events to the clinic by the patient that are defined in the study protocol. The events can also be subject-initiated through Viedoc Me, the ePRO application.
Study/Trial Design Model in XML (SDM-XML)	SDM	An extension of <u>ODM-XML</u> which allows organizations to provide rigorous, machine-readable, interchangeable descriptions of the designs of their clinical studies, including treatment plans, eligibility and times and events.
Study Data Tabulation Module	SDTM	A CDISC standard for how to structure raw data for a submission.
Security Assertion Markup Language	SAML	An open XML-based standard for exchanging authentication and authorization identities between security domains.
Security Token Service	STS	An open standard web service for issuing, validating, renewing, and cancelling security tokens for use with, for example, an API.
Single Sign-On	SSO	An authentication process that allows a user to access multiple applications with one set of login credentials.
Site		A clinic or other medical institute visited by subjects and where their data are recorded.
Site Manager	SIM	A user role in Viedoc Admin that can edit the details of their respective sites and invite site users to their sites.
Software As A Service	SaaS	Also known as web-based software, on-demand software, cloud software, and hosted software. Typically accessed by users via a web browser.
Standard Operating Procedure	SOP	Detailed, written instructions to achieve uniformity of the performance of a specific function.
Source Data		The original data when first recorded.
Source Data Verification	SDV	The process by which data within the CRF is compared to the original source of information (and vice versa).
Source Documentation		All original records and certified copies of original records of clinical findings, observations, or other activities in a clinical trial necessary for the reconstruction and evaluation of the trial. Source data are contained in the source documents.
Sponsor		Any organization that provides the institutional base for clinical trial researchers. This includes commercial groups: pharmaceutical companies, non-profit organizations, universities, and medical centers.
Statistical Analysis System	SAS	A format used for statistical analysis in the SAS software suite.
Study crew		Viedoc users and all staff involved in the clinical trial. In most cases, these terms refer to users of Viedoc Clinic (see also Clinic role).

Term	Abbreviation	Definition
Study design		The design of the study that covers all the details about how the study is supposed to be performed, such as treatment details, medical examinations and other data to be collected, the workflow, and the Viedoc permissions of the different clinic roles that contribute to the study. The study design is set up in accordance with the clinical trial protocol.
Study Manager	STM	A user role in Viedoc that has permission to manage the administration of the study in Viedoc Admin. The study manager invites the study crew, adds sites, and applies study designs to sites. This user role is usually assigned to the project manager of the clinical trial.
Subject		A person participating in the clinical trial. Also referred to as patient.
System roles		User roles in Viedoc that are defined by the system and give access to Viedoc Admin and/or Viedoc Designer. Examples are: Study Manager, Site Manager, Designer, Dictionary Manager, Unblinded Statistician.
I		:
Transport Layer Security	TLS	Protocols designed to provide communications security over a computer network.
Trial Master File	TMF	A type of content management system for the pharmaceutical industry, providing a formalized means of organizing and storing documents, images, and other digital content for clinical trials that may be required for compliance with government regulatory agencies.
<u>U</u>	_!	1
Unblinded statistician		A user role in Viedoc that manages the randomization and kit allocation lists in Viedoc Admin.
Unscheduled event		Additional events to the clinic by the patient that are not pre- defined in the study protocol.
V		·
Viedoc Inspection Readiness Packet	VIRP	A file that can be downloaded in Viedoc, containing all the information needed to fulfill regulatory expectations.
W		
World Health Organization Drug Dictionary	WHO DD	A dictionary maintained and updated by Uppsala Monitoring Centre.
X		,
Y		
Ζ		



#### How to prepare for a regulatory inspection

## How to prepare for a regulatory inspection

Published by Viedoc System 2024-10-10

 1. Introduction

 2. Viedoc Inspection Readiness Packet

 2.1 Documents included in VIRP:

 2.2 Other resources

 3. Areas of responsibility

 3.3 Viedoc responsibility

 3.4 Sponsor/CRO responsibility

 3.4 Sponsor/CRO responsibility

 4.5 Viedoc Designer

 4.6 Viedoc Logistics

 4.7 Viedoc Admin

 4.8 Viedoc eTMF

 4.9 Viedoc Clinic

 5. Footnotes

## 1 Introduction

It is important to be fully prepared for an inspection of relevant documentation about the EDC system used in a clinical trial. If the correct documentation is available for review by the regulatory authorities and certain validations have been performed, inspectors can then assess the systems used when collecting subject data in clinical trials.

There are also specific expectations that sponsors must comply with, depending on the regulatory body, European Medicines Agency (EMA) Food and Drug Administration (FDA) and the Japanese Pharmaceuticals and Medical Devices Agency (PMDA) even though these are similar in that they all expect the sponsor to have a complete understanding of the system. They also expect that the sponsor (or Contract Research Organization (CRO), if delegated) fully understands the functionality of the EDC system being used and can demonstrate this understanding and explain how the system has been validated.

## 2 Viedoc Inspection Readiness Packet

To assist in preparing for inspections, Viedoc has developed the Viedoc Inspection Readiness Packet (<u>VIRP</u>) which provides you with the information you need in order to fulfil regulatory expectations and requirements.

The VIRP is available for every release of Viedoc. The VIRP introduction describes the contents of VIRP in more detail, and also talks about additional documentation you should provide. The VIRP introduction is included in VIRP.

2.1 Documents included in VIRP:

- User Requirements Specification describing the epics and features, and listing the user stories included in the release
- Traceability Matrix detailing the testing performed for every requirement in the URS
- Validation summary report describing the validation activities performed for this release, and their result
- Release Notes describing the additions to Viedoc in the release
- Release Certificate verifying that we have followed our documented procedures during the implementation and associated activities for the release
- EDC Management Sheet for submissions to the PMDA
- Clinical Trial Cloud System Checklist

- Viedoc Impact Assessment documenting at a feature level the risks and potential consequences arising from the release of new and updated features in the release
- Acknowledgement Form describing what you need to review, and containing room for your signature as evidence that you have completed your review
- Table of Contents of applicable SOPs used by Viedoc Technologies in the production of this release
- An introduction describing the contents of the Viedoc Inspection Readiness Packet (VIRP)

#### 2.2 Other resources

- eLearning: Viedoc also provides an eLearning lesson <u>Inspection Readiness when Working in Viedoc</u>, which describes in detail the information needed step-by-step, as well as having additional information about potential pitfalls, what happens when new functionality is introduced in a release, about backward compatibility and more.
- The Viedoc Release Binder. We also store a snapshot of the information in our development environment for each release. This information is included in the Release Binder for that release which is stored in SharePoint and can be shared with inspectors either in a webinar or onsite.

# 3 Areas of responsibility

When it comes to preparing for regulatory inspections, there are different areas of responsibility for the Sponsor/CRO and Viedoc.

### 3.1 Viedoc responsibility

The Sponsor/CRO should be able to rely on Viedoc standard qualification documentation as there are no sponsor or study-specific software modifications made to the standard product. The configuration of Viedoc for use in a study is done using only functionality that has been validated before being released to the study.

Each new Viedoc version is fully validated before release - which takes place every 6-8 weeks. These releases are installed on all production servers at the same time, meaning all customers and all studies are updated at the same time. Furthermore, we ensure that ongoing studies are not affected by fulfilling the following two requirements:

- The new release must be 100% backward compatible.
- Any new functionality in the release shall be disabled for ongoing studies by default.

#### 3.2 Sponsor/CRO responsibility

Some areas and activities, however, remain the responsibility of the sponsor/CRO and should be documented:

- It is a Sponsor/CRO responsibility to validate the study configuration and confirm that the study has been set up in accordance with the study protocol. This validation should be documented.
- The different versions of systems used during the study and a synopsis of the differences between the versions should be stored as part of the study record in the sponsor (e)TMF.
- A risk-based assessment documenting the decision to rely on VIRP should be carried out.
- A checklist of the required functions (such as randomization module, patient ePRO module, coding module) for your trial on our epic<sup>1</sup> level, and where necessary, individual features<sup>1</sup>.

## 4 What to do on the day of inspection

When the inspector visits, they must have access to Viedoc. Regulatory inspectors have the legal right to view all data in the study – even patient data and hidden (anonymized) items in the audit trail. The study manager should invite the inspector to the Viedoc user role Regulatory Inspector when they arrive.

Follow these steps to ensure that the inspector has all the correct access permissions in Viedoc:

### 4.1 Viedoc Designer

This step is performed by the **Designer**.

In Viedoc Designer, on the **Roles** page, configure the Regulatory Inspector user role and make sure it is turned on.

To allow the Regulatory Inspector access to study data, their role must be configured with <u>Read-only</u> for form data and <u>View anonymized data</u> and <u>blinded data</u> permissions on the **Roles** page.

### 4.2 Viedoc Logistics

If the study uses Viedoc Logistics, the following role permissions in Logistics Rights for the Regulatory Inspector role must be configured on the **Roles** page:

- View IP (<u>Investigational Product</u>) on study level,
- View IP on site level
- View subject ID when allocated
- View blinded info (e.g. Active/Placebo).

#### See the image below and <u>Configuring roles.</u>

Edit role "Regulatory Inspecto	yr" [R16]
Edit role	Manage rights in this role
Name Regulatory Inspector Status	Special Uter can only view form data it his overrides all edit permissional Uter can only view form data it his overrides all edit permissional Uter can only view form data it his overrides all edit permissional Uter can only view form data it his overrides all edit permissional Uter can only view form data it his overrides all edit permissional Uter can only view form data it his overrides all edit permissional Uter can only view form data it his overrides all edit permissional Uter can only view form data it his overrides all edit permissional Uter can only view form data it his overrides all edit permissional Uter can only view form data it his overrides all edit permissional Uter can only view form data it his overrides all edit permissional Uter can only view form data it his overrides all edit permissional Uter can only view form data it his overrides all edit permissional Uter can only view form data it his overrides all edit permissional Uter can only view form data it his overrides all edit permissional Uter can only view form data it his overrides all edit permissional Uter can only view form data it his overrides all edit permissional Uter can only view form data it his overrides all edit permissional Uter can only view form data it his overrides all edit permissional Uter can only view form data it his overrides all edit permissional Uter can only view form data it his overrides all edit permissional Uter can only view form data it his overrides all edit permissional Uter can only view form data it his overrides all edit permissional Uter can only view form data it his overrides all edit permissional Uter can only view form data it his overrides all edit permissional Uter can only view form data it his overrides all edit permissional Uter can only view form data it his overrides all edit permissional Uter can only view form data it his overrides all edit permissional Uter can only view form data it his overrides all edit permissional Uter can only view form data it his
Read-only, view anonymized data	CRF Rights          Add/update subject/event/form data and query answes       Defere subjects       Sign subject/event form data and queries       Add/change queries       Add pre-queries       Pormote pre-queries       Data review       Clinical review       SDV         Lock data       Emergency untilinding       If warrangement data       Add pre-queries       Pormote pre-queries       Data review       SDV
	Logistics Rights           Verv IP on study level         Image IP on study level         Image IP on site level         Image

Notel Should the inspector also require access to Viedoc Admin or Viedoc Designer, and the study is managed by a Viedoc representative, you are always welcome to contact your Viedoc representative if you need assistance.

### 4.3 Viedoc Admin

These steps are performed by the Study manager.

In Viedoc Admin, the study manager invites the Regulatory Inspector to the study for all sites. See Managing users.

• The inspector should also be invited to the study with the role of Unblinded Statistician, in order to have access to the randomization lists and be able to download them in Viedoc Admin.

Note! This role is only used for randomized studies, when it is necessary to have control over who has access to and can manage the randomization lists.

 The inspector should also be able to access the eLearning. There is a requirement for customers to be able to present to regulatory inspectors, on request, the version of the eLearning used to train staff during the course of the study.

The Documentation tab under Study settings provides a list of all documentation and training sections.

🛠 Use	User Certification Close					
	dy settings u can set settings for study	I.				
Setti	ngs Date & time f	ormat Medical Coding	g Import ODM File	Documentation		
7 ac	tive - 0 archived s	sections		•	Add a new section	
Section	on	Target sites	Mandatory for	Optional for		
Pet.	Study Protocol	All sites	All roles		<b>8</b>	
Pet	CRF Completion Guidelines	All sites	Monitor	Investigator	8	
10	Viedoc User Guide fo Site Users	Demo Site		Investigator	8	
10	Viedoc User Guide fo Monitors	Demo Site		Monitor	8	
ē	Viedoc User Guide fo Data Managers	Demo Site		Data Manager	8	

The Regulatory Inspector role should be granted access to the relevant eLearning documentation on the Study settings page.

Edit 'Viedoc User Guide for Site Use <sup>Aanage training section settings here</sup>	ers'
Kttps://help.viedoc.net/c/94d6f0 Section last modified 2021-12-09T15:44:21 by	Archive
Section URL or file https://help.viedoc.net/c/94d6f0	
Section title Price Viedoc User Guide for Site Users 1	/ 6
Description Text based eLearning for site staff.	
Target sites	11
Select site group(s) or site(s)	
Require signing for following roles Select role(s)	
Require re-signing after # of days	
Optional for following roles Regulatory Inspector 🕱	

### 4.4 Viedoc eTMF

If the study uses Viedoc eTMF, the study manager/eTMF manager should map the Regulatory Inspector study role to an eTMF role with at least the following permissions: Read-only TMF Admin, Read-only Trial Master File and Download audit trail.

Study eTMF	cense is valid Enable Launch study eTMF
MF roles mapping p each Study role to one	e or more eTMF roles and permissions, if applicable.
tudy role	eTMF roles and permissions
	Site staff X Sponsor study X Sponsor country X Sponsor site X Reviewer X
nvestigator	Archive sponsor TMF ×       Archive investigator TMF ×       Download audit trail ×         Manage drop zone ×
nvestigator Monitor	
-	
Monitor	

See Viedoc User Guide for eTMF Managers - Managing Viedoc eTMF - Mapping user roles.

### 4.5 Viedoc Clinic

These steps are performed by the Regulatory Inspector.

The regulatory inspector accepts the invitation and activates their account - see <u>Viedoc User Guide for Site Users</u>: <u>Managing your Viedoc account</u>

The inspector can now launch Viedoc Clinic and the Viedoc eTMF from the landing page.

# 5 Footnotes

<sup>1</sup> At Viedoc, we publish our User Requirements Specification in an easy-to-understand format made up of epics, features, and user stories.

- Epics describe an overall module within Viedoc, such as audit trail, ePRO, and medical coding.
- Features describe a given functionality in more detail, such as Viedoc Connect, form link items, and email alerts.
- User stories are the detailed, broken-down requirements used by the system developers when designing, implementing, and validating Viedoc.



#### Quick guide for preparing for regulatory inspections

# Quick guide for preparing for regulatory inspections

Published by Viedoc System 2023-04-25

1. Configure the role 2. Configure Logistics permissions if used 3. Invite a Regulatory Inspector 4. Map eTMF permissions if used 5. Launch Viedoc

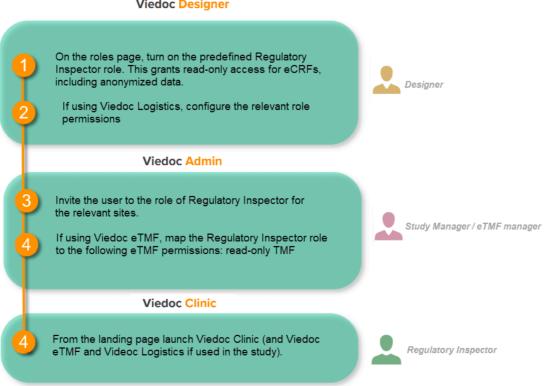
Thorough preparation for inspection of the EDC system used in a clinical trial is of great importance. The regulatory authorities see the EDC system used for a clinical trial as an important computerized system with regards to both patient safety and data integrity.

To assist in this process, Viedoc has developed the Viedoc Inspection Readiness Packet (VIRP) which provides you with the information you need to prepare for a regulatory inspection and to fulfil regulatory expectations and requirements. The VIRP introduction describes the contents of VIRP in more detail, and also talks about additional documentation you should provide. The VIRP introduction is included in VIRP.

If you decide to use VIRP we provide an eLearning lesson which describes the information needed step-by-step in order to fulfil inspector expectations: Inspection Readiness When Working in Viedoc

You can read about how to download the Viedoc Inspection Readiness Packet here: VIRP

You will need to give full read-only access and invite the inspector to the Regulatory Inspector role in the Viedoc system as described below.



#### Viedoc Designer

# Configure the role

#### This step is performed by the Designer.

To allow the Regulatory Inspector viewing access to study data, their role must be configured with <u>read-only</u> and <u>view anonymized and blinded data</u> permissions on the **Roles** page.

#### Note!

2

- The role of Regulatory Inspector must be turned on in Designer.
- By default, a set of predefined roles is set up by the system, and can be modified for your study.
   Permissions for the role of Regulatory Inspector should be set to READ-ONLY access to all parts of the system, including the eTMF (if it is used) and the eLearning.

## Configure Logistics permissions if used

If the study uses Viedoc Logistics, the following role permissions in Logistics Rights for the Regulatory Inspector role must be configured on the **Roles** page:

- View IP (Investigational Product) on study level,
- View IP on site level
- View subject ID when allocated
- View blinded info (e.g. Active/Placebo).

#### See Configuring roles.

Edit role "Regulatory Inspecto	r" [R16]
Edit role	Manage rights in this role
Name Regulatory Inspector Status	Special User can only vew form data this overrides all edit permissional Export of data into different formats/vew reports Metrics Create private notes Medical coding Vew reference data
Read-only, view anonymized data	CRF Rights Adduptes subject/event/form data and query smares. Defete subjects. Sign subject/event form data and queries. Add pre-queries. Phonote pre-queries. Data review Clinical review SDV Lock data Energency unbinding. We wanoomized data. Anonymize data
	Logistics Rights           Wew P on study level         Image P on stelevel         Manage P on stelevel         Image

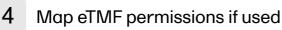
Notel Should the inspector also require access to Viedoc Admin or Viedoc Designer, you are always welcome to contact your Viedoc representative if you need assistance.

# 3 Invite a Regulatory Inspector

This step is performed by the Study Manager.

Note! For randomized studies, the inspector should also be invited to the study with the role of Unblinded Statistician, in order to have access to the randomization lists and be able to download them in Viedoc Admin.

See Managing users.



If the study is using the eTMF, map the Regulatory Inspector study role to an eTMF role with the permissions <u>read-only TMF Admin, read-only Trial Master File</u> and <u>Download audit trail</u>.

Study eTM	<b>F</b> Enable			
Study eTMF license is valid     Study eTMF license is valid				
MF roles mapping	9			
	g one or more eTMF roles and permissions, if applicable.			
	-			
p each Study role to o	one or more eTMF roles and permissions, if applicable.			
o each Study role to o	eTMF roles and permissions, if applicable.         eTMF roles and permissions         Site staff × Sponsor study × Sponsor country × Sponsor site × Reviewer ×         Archive sponsor TMF × Archive investigator TMF × Download audit trail ×			
e each Study role to o	eTMF roles and permissions, if applicable.  ETMF roles and permissions  Site staff × Sponsor study × Sponsor country × Sponsor site × Reviewer ×			

Launch Viedoc Clinic and Viedoc eTMF and Viedoc Logistics (if used in the study) from the landing page.

This step is performed by the Regulatory Inspector.

Launch Viedoc

This step is performed by the Study Manager/eTMF Manager.

Site Reviewer

5



Study start page

## Study start page

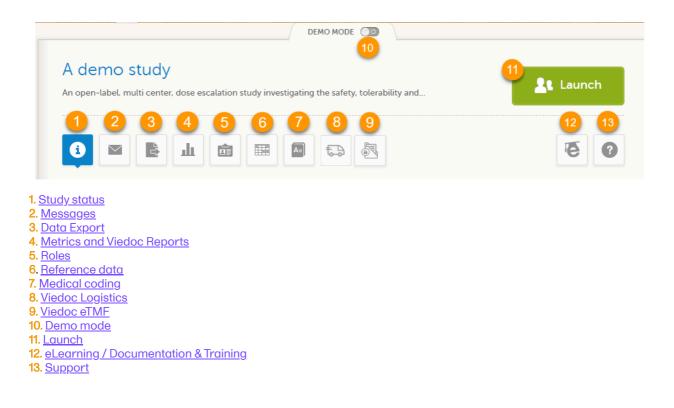
Published by Viedoc System 2024-12-03

**1. Introduction** 2. Study status 3. Messages 3.1 Alert messages 4. Data export 5. Metrics and Viedoc Reports 6. Roles 6.2 My roles 6.3 All roles and users for my site(s) 6.3.1 User logs 6.3.1.1 Log of users and roles in PDF format 6.3.1.2 User administration log in Excel format 7. Reference data 8. Medical coding 9. Viedoc Logistics 10. Viedoc eTMF 11. Demo mode 12. Launch 13. eLearning / Documentation & Training 14. Support

# Introduction

1

When you select the study logo in the landing page, the study start page loads, which contains the following icons that give access to different features, or enable you to view information about the study:



- The export, metrics and medical coding icons, the demo mode switch, and the launch button are only visible if you have access to the respective features. Whether you have access to these features, depends on the role assigned to you, and on the permissions that are included in your role.
- Roles and permissions are set up in the study design. The latest effective design for each site will be used to define the permissions that will apply to each role.

The first page displayed when you select a study is, depending on the status of the mandatory documentation and training materials, as below:

 If you have mandatory documentation pending to be read and signed, then the first page that opens is the <u>Documentation & Training</u>.

**Importantl** All the mandatory materials must be "Read & Understood" and signed before you can launch the study. You might be able to launch the study in demo mode, depending on the study settings performed by the Study Manager.

 If you do not have any mandatory documentation pending signing, then the first page that opens is the Study status page.

# 2 Study status

The Study status page is the first page that is shown when accessing a study, <u>if you do not have any mandatory</u> <u>documentation and training material that needs to be signed</u>. This page gives you an overview of the progress of the study - on study, country and/or site level (depending on which sites you have access to):

#### Study status

All sites Germa	ny Sweden	United States	
lssues			My statistics
Resolved queries	Open queries	Forms	Patients added: 146
160	26	21	FPA: 30 SEP 2014
TOO	20	<b>61</b>	LPA: 09 OCT 2015
Review			
CRA %	DM %	SDV %	
20	5	19	
Approval			
Inv. sign %	Queries %	Locked forms %	
46	22	17	

You can filter the displayed data for country or site by selecting the name of the country or site:

Study status All sites Academic Hospi				
Issues			My statistics	
Resolved queries	Open queries	Forms	Patients added:	71
12	16	54	FPA:	04 OCT 2016
12	10	JT	LPA:	27 AUG 2018
Review				
CRA %	DM %	SDV %		
1	0	1		
Approval				
Inv. sign %	Queries %	Locked forms %		
0	0	3		
<b>.</b>		<b>.</b>		

The following statistical information is provided, for the selected site(s):

- Issues
- Resolved queries total number of resolved queries
- Open queries total number of open queries
- Forms total number of forms with issues

Note! For resolved and open queries, this includes only manual and validation queries, not missing data queries. For resolved queries, the following statuses are included: **Resolved**, **Rejected**, **Approved**, and **Closed**.

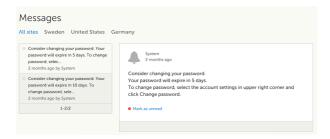
- Review
  - CRA % percentage of forms that were marked as Clinical Research Associate (<u>CRA</u>) reviewed out of total number of forms that can be CRA reviewed within the study
  - DM % percentage of forms that were marked as DM reviewed out of total number of forms that can be DM reviewed within the study
  - SDV% percentage of forms that were marked as Source Data Verification (SDV) reviewed out of total number of forms that can be SDV reviewed within the study
- Approval
  - Inv. sign % percentage of the forms signed by investigator out of total number of forms
  - Queries % percentage of approved queries out of total number of queries that await
  - approval. For details about query states and process, see Queries Overview.
  - Locked forms % percentage of the locked forms out of total number of filled in forms
- My statistics
  - Patients added the total number of patients added to the study
  - FPA date when the First Patient was Added
  - LPA date when the Last Patient was Added

Notel All the numbers reflect the data entered in the selected operation mode (demo or production), that is, <u>if demo</u> <u>mode is selected</u>, then the numbers reflect <u>only the data entered in demo mode</u>.

## 3 Messages

A message can either be a <u>system message</u> (such as notifications on password expiration), a <u>study message</u> (such as eCRF changes - for more information, see <u>Approving eCRF changes</u>, or other notifications according to the study configuration).

An indicator in the top bar of the application indicates whether you have unread messages.



### 3.1 Alert messages

According to the study configuration, you can receive alert notifications about important occurrences in the data. (For example, in case of a Serious Adverse Event). Alert notifications can be received in the Messages page and as an email.

Depending on the configuration/study setup, the email might have the PDF of the form that triggered that alert as an attachment.

If the option to enable password protection for the alert email attachments has been selected for your study, you should receive a password to enter to open the attachments. The password is provided by your Study Manager.

When you receive an email copy of the alert message with a password-protected attachment, when you open the file you will see the dialog box below where you can enter your password:

#### Password required

This document is password protected. Please enter a password.



## 4 Data export

The Data export page enables you to review and download study data in the following formats:

- Excel
- PDF
- Comma-Separated Values (CSV)
- Statistical Analysis System (SAS)
- Operational Data Model (ODM)

Notel Data export might not be available to all users.

For more information about data export and preview, see Exporting data.

## 5 Metrics and Viedoc Reports

The Metrics page gives an overview of the quality of data in terms of open queries and missing data.

Notel Metrics might not be available to all users.

For a detailed description, see <u>Metrics</u>.

If Viedoc Reports is included in the study license and enabled, it is accessed from the Metrics feature. For more information, see <u>Launching Viedoc Reports</u>.



### Roles

Note! The Roles page is only available for users with special permission to view roles, as per the study design.

The Roles page provides information on:

- The roles that are assigned to you, see <u>My roles</u>
- All the roles for the sites you have access to, see <u>All roles and users for my site(s)</u>



Under My roles you can see the roles that you have in the respective study:



The following information is displayed (with examples):

- The role name (*Investigator*)
- The list of the permissions (Save, sign, reset, delete and export data, resolve queries)
- The site(s) you have access to (Stockholm, Uppsala)

By selecting the green arrow button to the right, you will be directed to the Selection page. This is equivalent to selecting the Launch button.

#### 6.2 All roles and users for my site(s)

Here you can see a list of all the roles and the respective user(s) for the site(s) you have access to:

Il roles and users for the sites I have access to					
2	Inve	estigator(s)			Hide log 🔻
User/Site			Access granted	Access revoked	Data edits/Sessions
Mihaela Pavel (362), Group: All sites	and the second second	fine an	2018-04-05 12:22 UTC Doctor Demo	-	0 0
Doctor Demo (317), Multiple sites	dhanis part	ipiede con	2017-08-11 12:37 UTC Doctor Demo	•	143 77
1	Мо	nitor(s)			Show log 👻
1	Dat	a Manager(s)			Show log 🔻
		pof	Download log of users and roles as a PI	DF file	

To see user details of each role, select Show log. The log displays:

- User/Site the name of the user, email address and site
- Access granted when\* and by whom (user name) access was granted
- Access revoked when\* and by whom (user name) access was revoked (if applicable)
- Data edits/Sessions the number of times the user edited any data, and the total number of login sessions by the user (defined as the number of times the user has accessed the study)

\*date and time in Coordinated Universal Time (UTC) time zone

#### 6.2.1 User logs

For each study, you can download user logs with information about all users and roles for the sites you have access to. The generated file reflects the country/site selection in the language you have currently set in Viedoc. The following logs can be downloaded:

- Log of users and roles in PDF format
- User administration log in Excel format

If it's the first time the log is generated for the country/site selection in the language you have currently set in Viedoc, you can generate it by selecting the Generate a PDF file / Generate an Excel file link at the bottom of the page:



Generate an Excel file

After the user log was generated you can choose to:

- Download the latest generated log for the country/site selection the most recent version generated has a date and time stamp and is stored on the server, making it possible to directly download the file instead of generating a new one, or
- Select Regenerate if you need a more recent version than the one available for download.

#### 6.2.1.1 Log of users and roles in PDF format

The Log of users and roles PDF contains the following chapters:

- Summary the summary of active/inactive roles, active/inactive users as well as data contributors, grouped in one section per site.
- Roles a list of the permissions associated with each role and corresponding history, grouped in one section per site.
- User log per site a list of all users who ever had access to data, including user activity, grouped in one section per site.
- User account logs a list of the change history of all user accounts for the users listed in the above sections of the log, grouped per user (identified by the user ID).

#### 6.2.1.2 User administration log in Excel format

The User administration log contains the following sheets:

- Report Info general information about when and by whom the log was generated, and some information about the study status.
- User Access Log a list with detailed information about user access, showing one row per site and role, including clinic roles and system roles. Some columns in this sheet are further explained here:
  - Site Group indicates when a user is granted access to the site through a site group invitation. Possible values are Training sites, Countries, and All sites.
  - 2FA indicates what level of two-factor authentication the user has. Possible values are Study level, Account level, or No two-factor authentication enabled.
- Certification Log a list of certifications per user. Certifications performed before release 4.65 lack
  information about what roles the certification applies to. That is, the cells in column "Certified With Roles"
  are empty.
- Summary a summary of users per site with information about country, side code, site name, number of active/inactive users, and date/time of last access change.
- Account Settings Log a list with all user accounts setting changes with user id, change log, user name, and date/time.

# 7 Reference data

When you select the reference data icon, the list of available reference data source-scope combinations is displayed. From here you can open the reference data editor. For details see <u>Working with reference data</u>.

Notel Reference data might not be available to all users.

# 8 Medical coding

The medical coding feature allows you to code reported events like Adverse Events, Medical History and Concomitant Medications. When you select the medical coding icon, the page displays metrics regarding medical coding. There is one set of metrics for each medical coding scope available.

Note! Medical coding might not be available to all users.

For more information about medical coding, see Medical coding.

# 9 Viedoc Logistics

Viedoc Logistics is the interface for managing the supply of your study. A valid license is required to use Viedoc Logistics.

For more information about Viedoc Logistics, see Viedoc Logistics User Guide.



Viedoc eTMF is a digital repository for capturing, managing, sharing, and storing essential documents.

For more information about Viedoc eTMF, see Viedoc eTMF User Guide.

# 11 Demo mode

If enabled, a study can operate in demo mode. You can easily switch between demo mode and production mode using the **DEMO MODE** switch:

	DEMO MODE	
DEMO	The study is currently set to operate in demonstration & training mode. Do not input any real data.	DEMO

The DEMO MODE switch is only visible when you have access to both production and demo mode.

The demo mode is clearly indicated with demo icons. Make sure you do not enter any real data in demo mode!

See also the video tutorial Activate demo mode.

# 12 Launch

Select the Launch button to access the patient data and electronic Case Report Forms (<u>eCRF</u>s). The button is only visible when you have access to the study in Viedoc Clinic.

If multiple roles are assigned to you in this study, you are first prompted to select the role you would like to use to access the study.

# 13 eLearning / Documentation & Training

If you have mandatory documentation pending to be read and signed, this is the first page that is displayed when you access the study.

Under this section, you have access to several eLearning programs and various documentation, depending on the roles that have been assigned to you. For details about the user documentation and certificates, see <u>Documentation</u> <u>& Training</u>.

The Viedoc Clinic User Guides are available in the following languages:

- English
- Chinese
- Japanese

To change the language of the Viedoc User Guide, once opened, select the language from the upper right corner, as illustrated below:

VIEDOC eLearning			English • Español (España)
Viedoc User Guide for Site Use 30 lessons • Viedoc System 30 🗈 Download all lessons in a PDF fi			Français (France) 日本語 (日本) Polski (Polska) Svenska (Sverige) 中文(中华人民共和国)
General			5 lessons
Overview of Viedoc Clinic	1.1	System requirements	1.2
Managing your Viedoc account	1.3	Overview of the landing page	14
Approving study design changes	1.5		

Tipl The various lessons in the Viedoc eLearning can easily be compiled into a PDF and printed if you need to store them in the investigator binder.

# 14 Support

Select the support icon to open a pop-up with contact details to the users that can help you in case you need support. Normally you will find the contact details of the Monitor here, as the Monitor typically is the first point of contact to the site.

Back to top of page

-

Documentation and Training

# **Documentation & Training**

Published by Viedoc System 2020-06-04

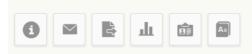
1. Introduction

2. Becoming a certified user

3. Downloading your user certificate

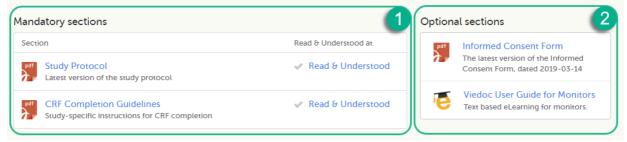
# 1 Introduction

Depending on the study settings and on the role(s) you have within a study, you might have access to various user documentation. This lesson describes the scenario when, under the eLearning section, you get access to the Documentation & Training page, with mandatory and/or optional documentation section(s), as illustrated in the following image:



### Documentation & Training

Before getting access to the study, please read all mandatory sections below and mark them as "Read & Understood". Once confirmed, Viedoc will generate a certificate of your completed training. Enjoy your trial!



The available documentation and training materials are split in two main categories:

1. Mandatory sections - contains all the materials that are mandatory for you to read, understand and sign before starting to work.

If you have mandatory documentation pending to be read and signed, then the first page that opens when you access the study is the Documentation and Training.

Important! All the materials under Mandatory sections must be "Read & Understood" and signed before you can launch the study. You might be able to launch the study in demo mode, depending on the study settings performed by the Study Manager.

2. Optional sections - contains additional educational and reference materials that you have access to. Simply click on the link to open each of the available documents/links.

To work within a study for which mandatory training sections were assigned, you need to read, understand and sign all the sections listed as mandatory.

To obtain the user certificate:

1 Click the link to open the section. Read through and, when you're done, go back to the Documentation and Training page and click **Read & Understood**. A date and time stamp in Coordinated Universal Time (UTC) will be shown in the **Read & Understood at** column:

		ē
Documentation & Training Before getting access to the study, please read all mandatory sec	tions below and mark them as "Read & Un	derstood". Once confirmed, Viedoc will generate a
certificate of your completed training. Enjoy your trial! Mandatory sections		Optional sections
Section	Read & Understood at	Informed Consent Form
Study Protocol Latest version of the study protocol	🖌 2019-04-11 14:44 UTC 🛛 🛞	The latest version of the Informed Consent Form, dated 2019-03-14
CRF Completion Guidelines Study-specific instructions for CRF completion	🛷 Read & Understood	Viedoc User Guide for Monitors Text based eLearning for monitors.

Repeat step 1 for each of the mandatory sections. When all the mandatory sections are marked as "Read & Understood", a Confirm 'Read & Understood' link becomes available:

landato	ry sections		
Section		Read & Understood at	
	Idy Protocol est version of the study protocol	✓ 2019-04-11 14:44 UTC	8
	F Completion Guidelines dy-specific instructions for CRF completion	✓ 2019-04-11 14:55 UTC	8
	Confirm 'Read & Unders	stood′	

3

2

Click Confirm 'Read & Understood'. A confirmation pop-up opens:

E Documentation & Training	Cancel
Confirm 'Read & Understood'	
Please confirm that you have read and understood all mandatory sections. Once confirmed, Viedoc will generate a certificate of your completed training and you get access to the study.	
Confirm with your password	
Confirm	

4 Enter your Viedoc account password and click **Confirm**. A confirmation message together with the date and time stamp (<u>UTC</u>) is displayed at the bottom of **Mandatory sections**. Also, a link to Download your User Certificate becomes available:

atory sections	
n	Read & Understood at
Study Protocol Latest version of the study protocol	🖌 2019-04-11 14:44 UTC 🛛 🕲
CRF Completion Guidelines Study-specific instructions for CRF completion	✓ 2019-04-11 14:55 UTC 🛞
✓ 'Read & Understood' confirmed 20	019-04-11 15:02 UTC
🧕 Download your User C	ertificate
	on Study Protocol Latest version of the study protocol CRF Completion Guidelines Study-specific instructions for CRF completion V Read & Understood' confirmed 20

5 Now you got your certification and are able to access the study. The Launch button is now available.

You can also Download your User Certificate. For details, see Downloading your user certificate.

The mandatory sections are still available for your further reference, you can at any time go back and open any of those by clicking the section link.

# 3 Downloading your user certificate

After you have completed all your mandatory readings and have signed and confirmed, as described in the previous section, you can download your user certificate in PDF format by clicking **Download your User Certificate** in the bottom of **Mandatory sections**.

The following information is provided on the certificate:

- User name (user ID is available on the page footer)
- User role(s) for which the certificate was obtained
- Date and time (UTC) when the certification was obtained (confirmed with password)
- Mandatory sections that were confirmed as "Read & Understood"



Metrics

## Metrics

Published by Viedoc System 2022-02-10

1. Metrics overview **1.1 Viedoc Reports** 2. Queries 2.2 Queries - filter 2.3 Queries 2.4 Query state 2.5 Top 5 events 2.6 Top 5 forms 2.7 Top 5 items 2.8 Top 5 check OIDs 2.9 Top 5 subjects (raised queries) 2.10 Save and export 3. Performance 3.11 Review status 3.12 Subjects 3.13 Queries 3.14 Missing data 3.15 Other 3.16 Save and export 4. Missing data 4.17 Top 5 events 4.18 Top 5 forms 4.19 Top 5 items 4.20 Subjects with confirmed missing data 4.21 Subjects with unconfirmed missing data 4.22 Save and export

# 1 Metrics overview

Note! As a Viedoc Clinic user, you need a special permission to view the metrics.

The metrics feature gives an overview of the quality of data in terms of open queries, missing data and overall site performance. You can filter the displayed data by country and site.



The metrics graphs depict:

- Open queries the number of currently open (not resolved) queries.
   A column graph shows five bars indicating the progress of posted queries during the last five weeks, where each bar indicates a seven day period.
   The latest seven days including today are shown in orange and the previous weeks are gray.
   A percentage indicator is also displayed to indicate the trend between the current week and the previous week. For example, +10% means that in the recent seven days, 10% more queries were in the state 'raised' as compared to the previous 7-day-period.
- Query rate the current query rate, counted as the total number of queries / number of subjects (according to the selection).
   A column graph shows five bars indicating changes to the query rate during the last five weeks, where each bar indicates a seven day period.
   The latest seven days including today are shown in orange and the previous weeks are gray.
   A percentage indicator is also displayed to indicate the trend between the current week and the previous week.
- Unconfirmed missing data items the amount of unconfirmed missing data items.

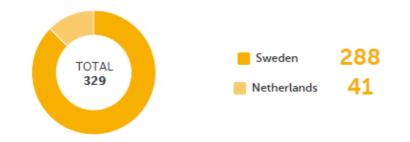
A column graph shows five bars indicating the changes to the missing data rate during the last five weeks, where each bar indicates a seven day period.

The latest seven days including today are shown in orange, other weeks are gray.

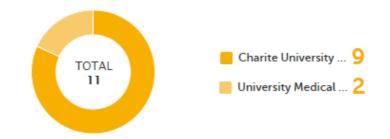
A percentage indicator is displayed to indicate the trend between the current week and the previous week.

A ring graph shows the distribution of missing data over those countries / sites / subjects with the most unconfirmed missing data, according to the selection made at the top of the page, as follows:

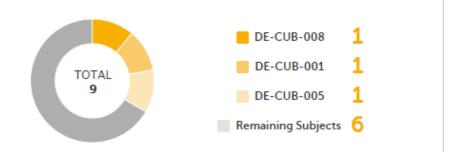
• All sites (default) - distribution over those countries with most unconfirmed missing data:



 Country - distribution over those sites within the selected country, with most unconfirmed missing data:



 Site - distribution over those subjects with most unconfirmed missing data (in orange) out of the total number of subjects with unconfirmed missing data within the selected site (in gray):



#### **Viedoc Reports** 1.1

If you have access to Viedoc Reports, you can open it from the Metrics feature.

	6
Metrics	
All sites Sweden United States	
Central Centra	pc Reports
Open Wedge Proofs	
OPEN QUERIES	0.50
<b>*</b>	0.00
More about queries	More about performance
Part ward spectra	

#### 2 Queries

The Queries page includes filtering possibilities and a bar to show the review status for the entire study.

For detailed information about the query process in Viedoc, see Queries overview.

#### Queries - filter 2.1

You can filter the data by selecting from the drop-down lists in the top of the page:

A Demo Stu	dy / Metrics				
? Queries	Performance	Missing data			
Show All countries	<ul> <li>All sites</li> </ul>	۲	All subjects 🔹	All time 🔻	Draw
•	Country Site Subject Time period - cha • All tim • Last 2 • Last 3 • Last 4 • Last 3	ne 4 hours 6 days veek			
Based on t	ne selected filter, t	the following i	nformation is prov	ided:	
•	Queries				

- <u>Query state</u>
- -
- Top 5 events
- Top 5 forms
- Top 5 items
- Top 5 OIDs
- Top 5 subjects (raised queries) •
- Save and export

#### 2.2 Queries

Queries - a diagram that shows the graphical distribution, the total number as well as the percentage of:

- The distribution of the type of queries that have been raised (VALIDATION, MANUAL)
- The number of queries that were raised on item or event date, respectively (ITEM, EVENT DATE)



The number in the center of the circle shows the total number of queries.

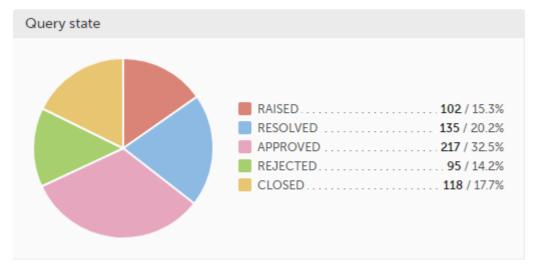
#### Notel

- All queries are included, regardless of the query state.
- Missing data is not regarded as queries, and therefore not included in the count.

For detailed information about query states and pro, see <u>Queries overview</u>.

### 2.3 Query state



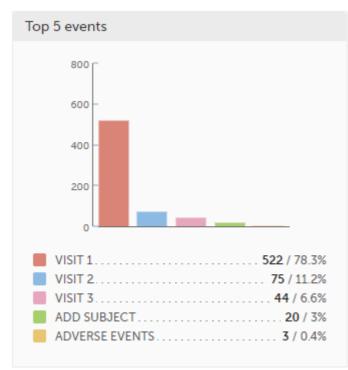


- RAISED number of raised queries / percentage of raised queries out of total number of queries
- RESOLVED number of resolved queries / percentage of resolved queries out of total number of queries
- APPROVED number of approved queries / percentage of approved queries out of total number of queries
- REJECTED number of rejected queries / percentage of rejected queries out of total number of queries
- CLOSED number of closed queries / percentage of closed queries out of total number of queries

For detailed information about query states and process, see Queries overview.

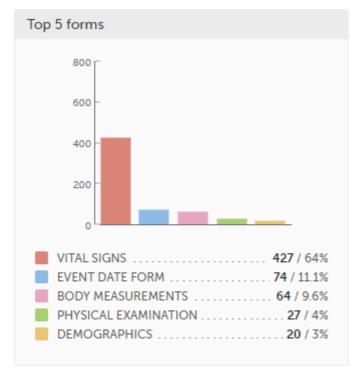
### 2.4 Top 5 events

**Top 5 events** - a column bar shows the top five events with the highest number of raised queries (numeric and percentage). The legend of the graph displays the event name.



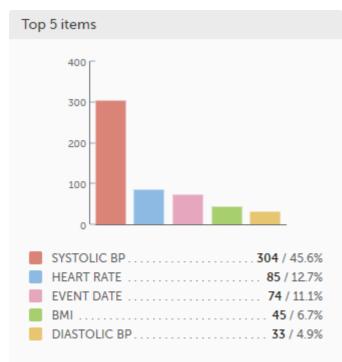
### 2.5 Top 5 forms

**Top 5 forms** - a column bar shows the top five forms with the highest number of raised queries (numeric and percentage). The legend of the graph displays the form name.



### 2.6 Top 5 items

**Top 5 items** - a column bar shows the top five items with the highest number of raised queries (numeric and percentage). The legend of the graph displays the item name.



### 2.7 Top 5 check OIDs

**Top 5 check OIDs** - top five most triggered edit checks are displayed in a table including the actual number, percentage, Object Identifier (OID), form name as well as the query message. The last row of the table shows the total number of queries.

Top 5 check OIDs						
•	n	%	FORM NAME	ITEM NAME	QUERY MESSAGE	OID
•	244	54.5	Vital Signs	Systolic BP	Value is outside of normal range. Please verify.	RC_VSSYS_0_0_1
	65	14.5	Event Date form	Event Date	Visit date is not within the protocol visit window	
	44	9.8	Body measurem	BMI	BMI is outside of normal range. Please verify.	RC_BMBMI_5_0_1
	24	5.4	Vital Signs	Diastolic BP	Value is outside of normal range. Please verify.	RC_VSDIA_0_0_1
	20	4.5	Vital Signs	Heart rate	Value is outside of normal range. Please verify.	RC_VSPULSE_0_0_1
	448	100	In total			

### 2.8 Top 5 subjects (raised queries)

**Top 5 subjects (raised queries)** - top five subjects that have the highest number of queries with current status *raised* are displayed in a table including the actual number, percentage, subject ID, study progress, site name as well as date of when the latest query was raised, name of who raised the query as well as the actual query message. The last row of the table shows the total number of subjects.

• n	%	SUBJECT ID	PROGRESS	SITE NAME	LATEST QUERY (date, by, message)
6 5	4.9	SE-01-045		Karolinska U	28 Feb 2018 09:46, Richard Schlomann, Test Query.
5	4.9	SE-01-119		Karolinska U	20 May 2016 08:24, Mr Demo, Correct?.
• 4	3.9	SE-01-118		Karolinska U	07 Sep 2016 11:51, System, Value is outside of normal range. Plea
• 3	2.9	SE-01-219		Karolinska U	07 Jun 2017 17:06, Lyle Wiemerslage, r?.
0 2	2	SE-01-348		Karolinska U	28 Mar 2018 12:44, System, Visit date is not within the protocol vi.
0 102	100	In total			

For detailed information about query states and process, see Queries overview.

### 2.9 Save and export

In the bottom of the Queries details page you have the options to:

- Save as a PDF file all the metrics data as displayed on the screen.
- Send by email to your primary email address, a PDF file with all the metrics data as displayed on the screen.

# 3 Performance

The Performance page allows you to compare data from:

- Selected country (individual country or All countries)
- Selected site(s) in the previously selected country (individual site or All sites)

With data in one of the following:

- Entire study (default)
- All sites in selected country
- A particular site in the selected country

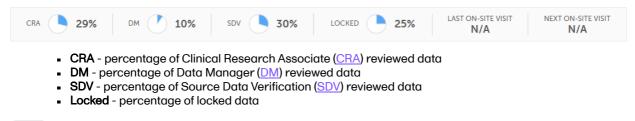
8	Queries	Performance	Missing data		
Show	All countries	• All	sites	•	Compare with Entire study * Draw

Based on the comparison selection the graphs will show statistics about:



- <u>Subjects</u>
   <u>Queries</u>
- Missing dat
- <u>Missing data</u>
  <u>Other</u>
- Other
   Save and a
- Save and export

#### 3.1 Review status



### 3.2 Subjects

Subjects - detailed data on the subjects on the selected site(s) (in orange) and compared site(s) (in gray):



The conditions for the following subject statuses are defined in the study design (in Viedoc Designer under *Study Settings > Subject status*):

- Screened the number of subjects screened:
  - at selected site(s) in orange
  - at site(s) to compare to in gray

- percentage of screened subjects at selected site(s) out of total number of expected subjects in the center (number of expected subjects for a study/site, is defined in Study/Site Settings in Viedoc Admin)
- Enrolled the number of subjects enrolled:
  - at selected site(s) in orange
  - at site(s) to compare to in gray
  - percentage of enrolled subjects at selected site(s) out of total number of screened subjects in the center
- Completed the number of subjects completed:
  - at selected site(s) in orange
  - at site(s) to compare to in gray
  - percentage of completed subjects at selected site(s) out of total number of screened subjects
     in the center
- Withdrawn the number of subjects withdrawn:
  - at selected site(s) in orange
  - at site(s) to compare to in gray
  - percentage of withdrawn subjects at selected site(s) out of total number of screened subjects
     in the center

Tipl If there is an i symbol inside of a ring graph, you can hover over it to see a description of the status.

### 3.3 Queries

Queries - detailed data on queries on the selected site(s) (in orange) and compared site(s) (in gray):

Queries			
Sweden Entire study			
QUERIES TOTAL	28	/ 70%	40 / 100%
ULAST 7 DAYS 0%	7 DAYS 16	14 DAYS 14 DAYS 16	N 21 DAYS 16

- Queries total the total number of queries on selected site(s) (in orange) and compared site(s) (in gray) are shown both in % and in actual numbers.
- Query rate total number of raised queries out of total number of subjects. The column graph consists of 5 bars indicating the progress of the query rate the last 5 weeks period, where each bar indicates a 7 days period.

Columns for selected sites are displayed in orange and columns for compared site(s) in gray. A percentage indicator shows the trend of the number of queries compared to the previous 7 days period for selected (to the left) and compared site(s) (to the right):

- down green
- up red
- equal black
- Queries open more than three circles display the number of queries currently in a Raised state, that have been open for more than, 7, 14 and 21 days on the selected site(s), which give a good indication of the pace queries are processed within different sites.

For detailed information about query states and process, see Queries overview.

### 3.4 Missing data

**Missing data** - detailed information on missing data (both confirmed and unconfirmed data) on the selected site(s) (in orange) and compared site(s) (in gray):

Missing data					
Sweden Entire study	1				
MISSING DATA TOTAL				288 / 82.76%	348 / 100%
	MISSING DATA RATE [# missing data / # subjects]		# UNCONFI	RMED MISSING DATA OPEN	MORE THAN
288 / 73 0 LAST 7 DAYS 0%		348 / 116 0 LAST 7 DAYS * -100%	7 DAYS 288	14 DAYS 288	21 DAYS 288

 Missing data total - Total number of missing data on selected site(s) (in orange) and compared site(s) (in gray) both numeric and percentage out of all missing data in the entire study. Hidden forms/items are not included in the count.  Missing data rate - current missing data rate calculated as total number of missing data per total number of subjects.

The column graph consists of 5 bars indicating the progress of the missing data rate the last 5 weeks period where each bar indicates a 7 days period.

Columns for selected sites are displayed in orange and columns for compared site(s) in gray. A percentage indicator shows the trend of the missing data compared to the previous 7 day period for selected (to the left) and compared site(s) (to the right):

- down green
- up red
- equal black
- Unconfirmed missing data open more than three circles display the number of currently unconfirmed missing data items that has been missing for more than, 7, 14 and 21 days (counted from the date the form was edited with unconfirmed missing data until current date) on the selected site(s).

### 3.5 Other

Other - miscellaneous detailed data on the selected site(s) (in orange) and compared site(s) (in gray):



• Time to enter data - the average time (in days) it takes to enter data for selected site(s) (in orange) and compared site(s) (in gray). This is calculated as a difference between the event date and the date the item data was entered, <u>per form</u>.

The column graph consists of 5 bars indicating the average time to enter data over the last 5 weeks period where each bar indicates a 7 days period.

Columns for selected sites are displayed in orange and columns for compared site(s) in gray. A percentage indicator shows the trend compared to the previous 7 days period for selected (to the left) and compared site(s) (to the right):

- down green
- up red
- equal black
- Time to resolve queries the average time to resolve a query (in days) for selected site(s) (in orange) and compared site(s) (in gray). This is calculated as the difference in days from the date the query was <u>Raised</u> until the date the query was <u>Resolved</u>. The queries that are automatically closed by the system (see <u>Queries overview</u> for details on when a query is automatically closed) are also included in the count.
   Notel The queries that were removed or automatically resolved are not included in the count.
   For detailed information about query states and process, see <u>Queries overview</u>.

The column graph consists of 5 bars indicating the average time to resolve queries over the last 5 weeks period where each bar indicates a 7 days period.

Columns for selected site(s) are displayed in orange and columns for compared site(s) in gray. A percentage indicator shows the trend compared to the previous 7 days period for selected (to the left) and compared site(s) (to the right):

- down green
- up red
- equal black
- Deleted forms rate the rate of deleted forms, calculated as the number of deleted forms per number of subjects, for selected site(s) (in orange) and compared site(s) (in gray).

The column graph consists of 5 bars indicating the deleted forms rate over the last 5 weeks period where each bar indicates a 7 days period.

Columns for selected site(s) are displayed in orange and columns for compared site(s) in gray. A percentage indicator shows the trend compared to the previous 7 days period for selected (to the left) and compared site(s) (to the right):

- down green
- up red
- equal black

### 3.6 Save and export

In the bottom of the **Performance** details page you have the options to:

- Save as a PDF file all the metrics data as displayed on the screen.

 Send by email to your primary email address, a PDF file with all the metrics data as displayed on the screen.

# 4 Missing data

The Missing data page includes filtering possibilities and a bar to show the review status for the entire study.

You can filter the data by selecting from the drop-down lists in the top of the page:

👉 A Demo 201	8 / Metrics				
Queries	Performan	ce 🖉 Missing d	ata		
ow All countries	¥	All sites	* All subjects	* All time	• Dra
• ( • S	Country				
	Subject				
• 7		l - choose bet	ween:		
		All time _ast 24 hours			

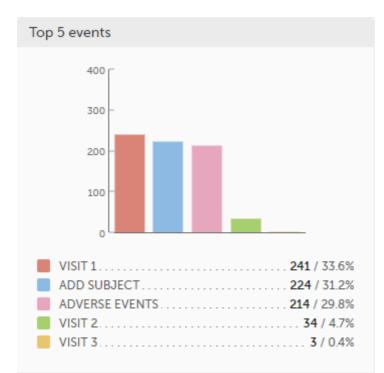
- Last 3 days
- Last week
- Last 3 weeks

Based on the selected filter the graphs will show statistics about:

- Top 5 events
- Top 5 forms
- <u>Top 5 items</u>
- <u>Subjects with confirmed missing data</u>
- <u>Subjects with unconfirmed missing data</u>
- Save and export

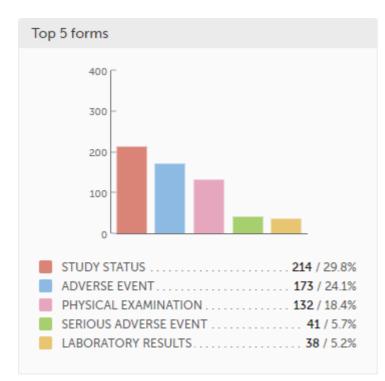
### 4.1 Top 5 events

**Top 5 events** - a column bar shows the top five events with the highest number of items with missing data (confirmed and unconfirmed), both numeric and percentage. The legend of the graph displays the event name.



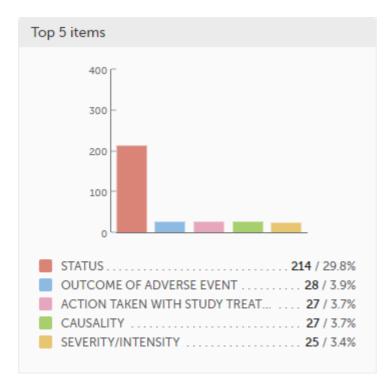
### 4.2 Top 5 forms

**Top 5 forms** - a column bar shows the top five forms with the highest number of items with missing data (confirmed and unconfirmed), both numeric and percentage. The legend of the graph displays the form name.



### 4.3 Top 5 items

Top 5 items - a column bar shows the top five items with missing data (confirmed and unconfirmed), both numeric and percentage. The legend of the graph displays the item name.



### 4.4 Subjects with confirmed missing data

The top 5 subjects that have the highest level of confirmed missing data are displayed in a table including:

```
    The actual number
```

- Percentage
- Subject ID
- Study progress

- Site name
- Date, visit, form and item (item output label if defined, otherwise the field label of the item) taken from the visit where the missing data occurs

The last row of the table shows the total number of subjects with confirmed missing data.

-					
🕒 n	%	SUBJECT ID	PROGRESS	SITE NAME	LATEST MISSING ITEM (date, visit, form, item)
0 2	4.1	SE-01-332		Karolinska Uni	12 Mar 2018 15:33, Visit 1, Body measurements, Wei
2	4.1	SE-01-284		Karolinska Uni	25 Jan 2018 08:43, Lyle W, Visit 1, Safety Laboratory Parameters, Pleas
2	4.1	SE-01-316		Karolinska Uni	24 Jan 2018 10:53, Visit 1, 12-Lead ECG, Performed.
0 2	4.1	SE-01-166		Karolinska Uni	07 Feb 2017 14:05, Visit 1, Physical Examination, Lymph
0 2	4.1	SE-01-110		Karolinska Uni	30 Mar 2016 11:58, Visit 1, Body measurements, Hei
0 48	100	In total			

#### 4.5 Subjects with unconfirmed missing data

The top 5 subjects that have the highest level of unconfirmed missing data are displayed in a table including:

- The actual number
- Percentage
- Subject ID
- Study progress
- Site name
- Date, visit, form and item (item output label if defined, otherwise the field label of the item) taken from the visit where the missing data occurs

The last row of the table shows the total number of subjects with unconfirmed missing data.

	0/	SUBJECT ID	PROGRESS	SITE NAME	
n	%	SORJECTID	PROGRESS	SITEINAME	LATEST MISSING ITEM (date, visit, form, item)
6 42	6.2	SE-01-320		Karolinska Uni	12 Feb 2018 10:59, Adverse Events, Serious Ad
0 24	3.5	SE-01-344		Karolinska Uni	19 Mar 2018 11:05, , Adverse Events, Serious Adverse E
0 22	3.2	SE-01-331		Karolinska Uni	08 Mar 2018 16:35, Adverse Events, Adverse Event, .
• 19	2.8	SE-01-249		Karolinska Uni	18 Aug 2017 09:52, , Adverse Events, Adverse Event,
• 16	2.3	SE-01-281		Karolinska Uni	28 Sep 2017 09:07, Visit 1, Laboratory results, Crea.
669	100	In total			

### 4.6 Save and export

In the bottom of the Missing data details page you have the options to:

- Save as a PDF file all the metrics data as displayed on the screen.
- Send by email to your primary email address, a PDF file with all the metrics data as displayed on the screen.



Selection page

# Selection page

Published by Viedoc System 2023-10-09

1. Introduction
1.1 Sorting and filtering
<u>1.2 Searching</u>
<u>1.3 lcons</u>
2. Views of the Selection page
2.4 The Cards view
2.4.1 The subject card overview
2.5 The issues view
2.6 The Viedoc Me view
2.7 The Events view
<u>3. Adding a new subject</u>

# 1 Introduction

The Selection page displays all the subjects from all the sites you have access to:

Lection · Cards ·			2.
Search 🔎 🔻	FOUND 11 CARDS.		Show all sites   Sort by added date
SE-KI-004	SE-KI-003 Intelantistrute stocshoum Status Age Screened 27.9	FI-HU-005 HELSING UNIVERSITY HOSPITAL Suna Age Screened 26.9	Sterend S8.2
FI-HU-004 HELSING UNIVERSITY HOSPITAL Screened 37.1	FI-HU-003 HELSHKU UNIVERSITY HOSTITAL Screened 29.1	FI-HU-002 HELSINGU LUNVESSTY HOSSITZL Satur Age Screened 30.6	SE-UU-001
FI-HU-001 HELSINU UNIVERSITY HOSPITAL Status Age 35.0	SE-KI-OO2 KARONISKA INSTITUTE STOCKHOLM Status Age Screened 50.9	SE-KI-001 RADLINGKA INSTITUTE STOCKHOLM Status Age Screened 36.7	Add new card
Showing 1-11 of 11 PREVIOUS NEXT			View per page 20 50 100 500

In the default view, each subject is represented by a card. Depending on your study setup, the Selection page can be displayed in several ways. See <u>Views of the Selection page</u>.

### 1.1 Sorting and filtering

In the top right corner of the Selection page, you have dropdown menus to sort and filter the view. The options depend on the selected view. The selected sorting will be kept throughout your session.

		2.
Show all sites	¥	Sort by added date 🔹

In the table view of the Selection page, you can also sort by column in descending or ascending order by selecting a column header with the arrow symbol. Lit-up arrows indicate the selected sorting in orange:

Selection · Cards ·					
Search		FOUND 11 CARDS.			
Gender 🗤	ID 4†	Status 4†	Age ↓†		
2	SE-KI-004	Screened	51.2		
2	SE-KI-003	Screened	27.9		
2	FI-HU-005	Screened	26.9		
2	SE-UU-002	Screened	58.2		
2	FI-HU-004	Screened	37.1		
<u>.</u>	FI-HU-003	Screened	29.1		
2	FI-HU-002	Screened	30.6		
<u></u>	SE-UU-001	Screened	38.8		
<u>.</u>	FI-HU-001		35.0		
2	SE-KI-002	Screened	50.9		
2	SE-KI-001	Screened	36.7		

#### 1.2 Searching

To search for a specific subject or any other information collected for a subject, you can type the text you are looking for in the search field:

▲ Selection ·	Cards	•	
Search			,0 <b>*</b>
		Subject key	
SE-KI-004		All data	

The system will return the subjects with the information sought that has been entered in the Case Report Form (<u>CRF</u>).

Subject key and All data are two filters that can be applied to the search.

- Subject key will return results where the search term is part of the subject ID.
- All data will return results where the search term is mentioned.
- All data also requires specificity when you commit a search for visit name and form name. It does not return partial results in these instances.

Notel For faster searches, we recommend that you select the Subject key filter.

Important! If your search returns nothing, it could indicate a problem with your study design. Please contact your Professional Services representative to assist you.

### 1.3 Icons

The Selection page displays a number of icons explained in the following table:

lcon	Description
i	Issue - at least one open query and/or missing data
7	Task - there are tasks to be completed, the number indicates the number of tasks
<b>~</b>	Complete - all initiated events have been completely filled in

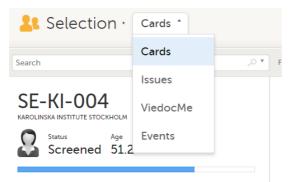
lcon	Description
٢	Signed - all data that is possible to sign has been signed
8	<b>Read-only</b> - the card is being open for edit by another user. Note that the subject card can still be accessed for review or SDV by a user without edit permissions, for example a monitor or a data manager.
×	<b>In progress</b> - the event is initiated but not completed This icon is only shown when none of the other status icons apply
6	Locked - the data in all forms of the event is locked

Notel The icons showing depend on your user role permissions.

# 2 Views of the Selection page

Depending on the study setup, the Selection page looks a bit different.

• If the study is configured with extended selection pages, you can select a view at the top of the page. Select **Cards**, **Issues**, **Viedoc Me** or **Events** from the dropdown menu to open the view. The Viedoc Me view is only available to select if the Viedoc Me feature is included in your study.



 If the study is <u>not</u> configured with extended selection pages, you can select between the views Cards and Issues by clicking the buttons next to the search field.

### 2.1 The Cards view

In the **Cards** view, you can see all the subjects from all the sites you have access to. Select to display the subject cards side-by-side (default) or in a table:

,o *	FOUND 29 CARDS.				
1	SE-01-018 UPPALA STATUS AGE		AE-423-00 DUBAI STATUS Ongoing		
ì	SE-01-017 UPPSALA STATUS AGE 42.0		Lina-001		
	42.0	,0 * FOUND 29 CAR	DS. ATUS 41	AGE #1	Rand. Numbe
i	SE-01-015	С	Ongoing		
_		C	Ongoing		
				60.5	
				42.0	
				42.0	

The subjects are sorted by added date, where the most recently added subject is displayed first. You can sort the subject cards by selecting an option in the upper right corner:

Show all site	es	*	Sort by added date
PROGRESS #	t		Sort by importance
			Sort by modified date
			Sort by added date

- Sort by importance sort on forms with issues in descending order
- Sort by modified date sort on modified forms in descending order
- Sort by added date sort on added forms in descending order

To display only the subjects for a particular site, select the site from the dropdown list. Click **Include deleted subjects** at the bottom of the dropdown menu to display deleted subjects:

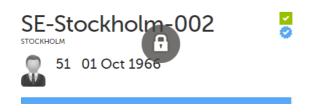
			<u>2</u> .
		Show all sites	Sort by added date 🔹
ospital Age ed 58.2	FI-HU HELSINKI UNIVE	Show all sites Karolinska Institute Stockholm Uppsala University Hospital Helsinki University Hospital Martin Luther Hospital United Richmond	
ospital Age ed 38.8		Include deleted subjects	

#### 2.1.1 The subject card overview

Each card provides subject information as per the respective study design:

- Subject ID
- Site name
- Gender indicated by an avatar
- Some <u>CRF</u> data
- Subject status indicated by the icon in the top right corner

If all the forms were locked (typically by the Monitor), this is shown with a padlock icon on the respective subject card:



- Progress bar indicating the completion status (in blue)

Notel The Selection page does not consider the role visibility except for task count; therefore, the subject status reflects the general status of the subject in the study, regardless of the user who has work to be performed. The subject details view reflects the subject status considering the role visibility. This could result in a subject status where a subject could have a green check mark or be locked, while in the Selection page it is not (due to some other user role having unfinished work or forms to complete on the respective subject). See <u>Entering and Editing data</u> for more information on the subject details view.

### 2.2 The issues view

In the Issues view, you can see the existing issues listed in a table:

Selection · Issues	•				
Search	FOUND 9 ISSUES.			Show all sites	All open issues
ID 41	REFERENCE 41	ISSUE DETAIL 41	CONFIRMATION 41	STATE 41	
EI-HU-002	Medical History Medical History Description of condition / event / surgery	! Missing data		Missing data	•
EI-HU-002	Prior and Concomitant Medications Prior and Concomitant Medications Dose	! Missing data		Missing data	
EI-HU-002	Prior and Concomitant Medications Prior and Concomitant Medications Dose form	! Missing data		Missing data	
Elsinki University Hospital	Prior and Concomitant Medications Prior and Concomitant Medications Frequency	! Missing data		Missing data	

Click any row to open the form where the issue was raised:

Lection · Issues ·		📓 FI-HU-002 🎽 #1 - Term: - Start Date: 🎽	Edit Close	
Search	, • )	Form is in view mode. Click 'Edit' to make it editable     This form contains 8 required field(s)		Show all sites
ID         IF           ID         IF           IF         <	REFERENCE # Medical History Description of condition Prior and Concomitant I Dose Prior and Concomitant Prior Prior and Concomitant I Prior and Concomitant I	Prior and Concomitant Medications	SHOW HISTORY 🗿 💿	Store a state  Record State
EFI-HU-002     FI-HU-002     Hetersk University Hospital	Dose form Prior and Concomitant / Prior and Concomitant / Frequency	O ther  O ther  Dose Unit  Choose one. *  Frequency  Route  Route	Ġ	Monrydat
		Choose one. *  Start date Ongoing?  ( dd MMM yyyy) ) O Yes O No	G	
		Nicholas Hall   Viedoc <sup>24</sup> 4.72.8259.15573   2022-08-16T(15-49 EEST NA;   1.0   Viedoc He study   Helania University Hospital	P Form History	

Close the form to go back to the **Issues** list.

You can filter the **Issues** list using the dropdown lists in the upper right corner of the page:

			<b>.</b>
	Show all sites	¥	All open issues
CONFIRMATION #1		STATE 👪	All issues
			All open issues
			All queries Open queries Queries awaiting approval
			Missing data
			Form upgrade pending
			Form link broken
		Missing data	
		Missing data	I
		Missing data	

- By site view data from a specific site or from all sites
  - Include deleted subjects
- By issue type/status:
  - All issues:
    - a. Missing data
      - b. All queries, regardless of status
      - c. Form upgrade pending
      - d. Pending reference data upgrade
    - All open issues:
      - a. Missing data
      - b. Queries with the status "Awaits answer"
      - c. Form upgrade pending
      - d. Pending reference data upgrade
    - All queries
    - Open queries
    - Queries awaiting approval
    - Missing data

#### Form upgrade pending

Form link broken

#### 2.3 The Viedoc Me view

In the **Viedoc Me** account view, you can monitor and follow up on the subjects' expected Viedoc Me event submissions.

Se	election · ViedocMe	*					
arch		,O * FOUND 11 CARDS.				Show all sites	* All accounts
6†		# LOGINS (LAST LOGIN) 41	COMPLIANCE #1	# MISSED EVENTS (LAST MISSED) 41	STUDY COMPLETION 41	NEXT SCHEDULED 41	ACCOUNT STATUS 41
8	SE-KI-004 Karolinska Institute Stockholm	2 2022-06-16 08:31 CEST	50%	1/2 (2022-06-11 00:00 CEST)	100%		Open
9	SE-KI-003 Karolinska Institute Stockholm	<b>1</b> 2022-06-02.11:59 CEST	0%	2/2 (2022-06-02 00:00 CEST )	100%		Open
2	FI-HU-005 Helsinki University Hospital	1 2022-06-01 11:39 EEST	-		0%		Open
2	SE-UU-002 Uppsala University Hospital	0	-		0%		Initiated
8	FI-HU-004 Hetsinki University Hospital	14 2022-06-21 21:15 EEST	100%	0/2 -	100%		Open
2	FI-HU-003 Helsinki University Hospital	0	-		0%		Initiated
2	FI-HU-002 Hetsinki University Hospital	19 2022-06-16 09:29 EEST	-	-	-	-	Open
2	SE-UU-001 Uppsala University Hospital	<b>1</b> 2022-05-13 17:18 CEST	-	-	-		Open
2	FI-HU-001 Helsinki University Hospital	14 2022-05-23 19:15 EEST	-	-	-		Open
		10		1/2			

For each subject, the following information is listed:

- ID the subject ID, avatar, and site
- # LOGINS (LAST LOGIN) the total number of logins with the last login shown in parentheses
- COMPLIANCE how well the subject is submitting events, counted on scheduled Viedoc Me events
- # MISSED EVENTS (LAST MISSED) the total number of missed Viedoc Me events, with the last missed event shown in parentheses
- STUDY COMPLETION how far into the study the subject is, counted on scheduled Viedoc Me events
- NEXT SCHEDULED the date and time of the next Viedoc Me event
- ACCOUNT STATUS the current status of the subject account, which can be filtered in the upper right corner:
  - All accounts all created Viedoc Me accounts: Initiated/Open/Locked
  - Initiated accounts that are created but the subjects have never logged in to their accounts
  - Open accounts that the subjects have logged in to (at least once)
  - Locked accounts that are locked
  - Not created accounts that are not yet created

## 2.4 The Events view

In the Events view, you can see the status of each event for each subject listed in a table.

Search		,0 * F	OUND 11 CARDS.						Show event types	<ul> <li>Show all sites</li> </ul>	* Sort	by added date
ID 41	Study Start	Screening	Baseline	Home adm.	Follow-Up	End of St	Unschedu	Extra Lab	Extra Lab	Extra Kit A	Medical H	Adverse E
SE-KI-004	<b>~</b>	<b>•</b>	X	Ξ			⊠				<b>~</b>	
SE-KI-003	<b>•</b>	<b>•</b>	×									
🚨 FI-HU-005	<b>~</b>	⊠									<b>×</b>	
SE-UU-002	<b>•</b>	⊠										
8 FI-HU-004	Ø 🔽	<b>~</b>	×	🔒 🔽			0					
🚨 FI-HU-003	<b>•</b>	⊠										
🚨 FI-HU-002	<b>•</b>	⊠						X	Ξ		i	
🚨 SE-UU-001	<b>•</b>	<b>~</b>										
🚨 FI-HU-001	<b>~</b>											
SE-KI-002	<b>•</b>	<b>•</b>	⊼	⊠								
SE-KI-001	<b>~</b>	2	Z		Z							

The first column indicates if there are issues/tasks in any of the subjects' events. If there are both issues and tasks for a subject, then issues [i] are shown in the column.

Select any cell to go to the event in the Details page:

Search	,0 * F0	JND 11 CARDS.						Show event types	▼ Show all sites	* Sort by added dat
41 ID 41	Study Start Screening	Baseline	Home adm.	Follow-Up	End of St	Unschedu	Extra Lab	Extra Lab	Extra Kit A	Medical H Adver
SE-KI-004	<u> 8</u> Details								<u>1</u> ° I 1	I) <b>2.                                   </b>
SE-KI-003			Search						Show all ev	rents * Eatt SS*
🚨 FI-HU-005	SE-KI-003								Show all en	
SE-UU-002	Status Age		Screening	Baseline	Home adm. Home Administration					
S FI-HU-004	Screened 27.9		01 Jun 2022	✓ 01 Jun 2022	01 Jun 2022 (-0/+7)	iii				
🚨 FI-HU-003	52% 2/3 of study events	9/17 forms	Screenin	Ig Ready					Protocol date not set	0
🚨 FI-HU-002	Demographics	EM CAA 507 🔒 🖌	Event date					20 04 37 B	Scheduled date	C
🊨 SE-UU-001	Common events		Check Question					DM CM 107 D	not set	
🚨 FI-HU-001	Medical History (0) Adverse Events (0)	*	Physical Examina						01 Jun 2022	<b>1</b>
SE-KI-002	Prior and Concomitant Medications (0)		Vital Signs					8 8 8 A		
SE-KI-001	Subject's adverse reactions (0) Cognitive Test Sample (0)		Body measureme	ents				8 8 8 B		
-			12-Lead Electroo	ardiogram						
	Add new event	+	Laboratory result							
	Add new event			ts						
			Visit Status					8 8 8 B		

Click back in the browser to return to the Events view.

Select an empty cell to view the subject's latest event.

The list of subjects can be filtered using the dropdown lists in the upper right corner of the page:

- By event type
  - Scheduled events
  - Unscheduled events
  - Common events
  - Subject-initiated events
- By site select to view data from a specific site or from all sites
  - Select to Include deleted subjects

Notel On the selection page, in the **Events** view, the <u>event name</u> (as set in the Study event settings in the study design) is displayed. If there is a recurring event, a counter is shown under the event name, for example: Follow up 1, Follow up 2.

# 3 Adding a new subject

To add a new subject:

1 Make sure that you have selected a site (center) from the sites dropdown list. Click **Add new card** on the last card or select the icon in the top right corner of the page:

Lection · Cards *			<b>1</b> .
Search 🖉 🕫	FOUND 11 CARDS.		Show all sites    Sort by added date
SE-KI-004 MICLINKA MITTUTI STOCKIKA Struke Age Screened 51.2	SE-KI-OO3 INCLINAL HISTUTTIS STOCKICAM Status Age Screened 27.9	FI-HU-005 HELINDI UNKERTY NOTITAL Stratu Age Screened 26.9	SE-UU-002 UMJAL MANEGEN ACOMMA Statut Age Screened 58.2
FI-HU-004 RELIVARI UNKREATY AUGMITAL Status Age Screened 37.1	FI-HU-003 HILLINE LANCENTY HOUSHIL Strins App Screened 29.1	FI-HU-002 HELMOUNDERSTY MODERIA Strain Age Screened 30.6	SE-UU-001 UMMALANERGISTI HOOMTAL Screened 38.8
EI-HU-001	SE-KI-002 Maranewa Metmura Hockmeran Sama Age Screened 50.9	SE-KI-001 MARCANDA MITITAL TOCONCLA Service Are Screened 36.7	Add new card
Showing 1-11 of 11 PREVIOUS NEXT			View per page 20 50 100 500

The first form in the study is displayed.

2 Complete the form and select **Save changes** on the top right side of the page. A new subject is now added.

Notel Only user roles with editing permissions for the <u>study start event</u> form can add a new subject. If you do not have editing permissions, you cannot select **Add new card** and no icon is visible in the top right side of the page.

See also the video tutorial Add and select subjects.

If you receive the following message, the maximum number of subjects that is configured for your site has been reached, and you cannot add new subjects. If you need to add a new subject anyway, contact your Study Manager.

Add new sub	ject	e
i	The maximum number of subjects reached. New subjects can no longer be added.	



#### Entering and editing data

# Entering/Editing data

Published by Viedoc System 2025-02-18

1. Overview 1.1 Details page 1.2 An example of a form 2. Initiating an event 2.3 Scheduled event 2.4 Unscheduled events 3. Entering data 3.5 Working in multiple browser tabs 3.6 Entering data in a form 3.6.1 Dates 3.6<u>.2 Times</u> 3.6<u>.3 Range</u> 3.6.4 File upload 3.7 Linking between forms 3.7.5 Updates to linked forms 3.7.6 Locations of updated linked forms 3.7.7 Updating a linked form 3.8 Navigating between subjects/events within the same form 4. Editing data 5. Repeating forms 6. Copyable forms 7. Confirming data as missing 8. Adding private notes 8.9 Private notes for events 8.10 Private notes for forms 8.11 Private notes for fields 9. Resolving a query 10. Audit trail and form history 10.12 Limited number of audit trail records 10.13 Form history PDF 10.14 Masking of sensitive data 10.14.8 Masking text 10.14.9 Masking a filename 10.14.10 Masking file content 10.15 Consequences of masking data 10.15.11 Data exports 10.15.12 Form PDFs 10.16 Viewing masked data **11. Blacklisted file formats** 

1 Overview

1.1 Details page

When you select a subject card in the Selection page, or add a new subject, the Details page opens.

Letails							a b c	d e 2 ♣, ▲ ≜ ≥
DE-95-077 BERLIN HOSPITAL STATUS AGE Ongoing 41.1		Search Screening Screening 14 07 2021	0 Baseline 16 07 2021	Follow-Up test	Final Visit End of Study 26 07 2021		Show all events	• 📼 🖬 3
29% 4/4 of study events Demographics	8/27 forms	Screening Screening	Ongoing				5 Protocol date not set Scheduled date	<u> </u>
Common events Medical / Surgical History (2) Prior and Concomitant Medications (0)	DM CRA 52V 0 4 + +	Event date Check Questions				CBA 507 📾 🗹	not set Event date 14 07 2021	۲
Adverse Events (0) Subject's non-study medications (0) Subject's adverse reactions (0)	٠	Physical Examination Vital Signs				*	Add note	7
Subject's exercise diary (1) Subject's daily pain report (0)		12-Lead ECG Body measurements Wound Examination				*		
Add new event	٠	Laboratory results Evaluation of objectiv	ve tolerance			em (BA 50V 🔒 🔽		

Here you will find the following information:

1. Subject details - including subject ID, site name and a status summary.

Notel The subject details view reflects the subject status and the review flags considering the role visibility, while the Selection page does not take into account the role visibility. Therefore, the subject status on the Selection page reflects the general status of the subject in the study, regardless of the user who has tasks to be performed. This could result, for example, in a subject status in the subject details view where a subject could have a green check mark or being locked, while in the Selection page it is not (due to some other user role having unfinished work/forms to complete on the respective subject).

The following flags show the status of each form:

DM	CRA	SDV	0	
				× 1

Flag	Description
DM	Shows if the data was reviewed by the Data Manager (DM) or other role with review permission. Green check-mark if performed, otherwise grey.
CRA	Clinical review indicator, reviewed by Clinical Research Associate (CRA) or other role with review permission. Green check-mark if performed, otherwise grey.
SDV	Source Data Verification (SDV) indicator. Green check-mark if performed, otherwise grey.
Lock	Black if the form was locked by the Monitor, otherwise grey.
Status	<ul> <li>Shows the status of the data entered:</li> <li>Green check-mark if the form is completed</li> <li>Red [i] if the form has issues</li> </ul>

Note! The flags are not displayed for the empty forms.

2. Toolbar with the following functions:

- a. Return to the Selection page
- b. Set up Viedoc Me
- c. Initiate a Viedoc Connect call
- d. Add a new subject
- e. Toggle between subjects

Depending on the role and permissions you have, the following might also be available:

Signing console (for details, see <u>Signing data</u>):



 Data review console, for user roles with data review permissions (for details, see <u>Clinical review, SDV and</u> <u>Lock</u> and <u>Data review and Lock</u>):



See also the video tutorial Enter data.

3. Event slider - a list of all the scheduled and unscheduled events for the subject.

From the top-left corner you can search for events. All events containing characters of the search string are filtered and shown in the slider.

From the top-right corner you can toggle the view and change the way the events are displayed: only by name or with detailed cards. Tipl Toggle to the "only by name" view to fit all events, if there are many matches in your search result.

From the dropdown list to the right you can select to:

- Show all events
- Show all initiated events
- Show all unplanned events
- Show / hide subject-initiated events
- Show / hide deleted events

4. Common events - here you can add events that cannot be scheduled in advance, such as adverse events, by clicking on the respective event name.

You can also add unscheduled events by clicking the **Add new event** link. The unplanned events will show up in the event slider inserted among the existing events according to the event date.

5. The list of the forms to be filled in for the event selected in the event slider (2). Click the form bar to open it and enter the data. Depending on the study setup, it may be necessary to initiate the event through the Event date form, to be able to enter data. For more information, see <u>Initiating an event</u>.

6. The protocol date, the scheduled date (if set), and the event date (if set).

7. Private notes. For details, see <u>Adding private notes</u>.



#### An example of a form

When you click on a form on the Details page, the form opens. The below image shows an example of a form:

	3
SE-AHU-024 * Visit 3 [14 Nov 2017] *	Close
💢 Form is in read-only mode.	
12-Lead ECG 👽 🧐 🖬 🔽 4	
Was 12-Lead ECG performed? Date	€6
● Yes ○ No ▼ 14 Nov 2017 00:00	
Was 12-Lea         Yes         Initial data entry           (294) 20 Nov 2017 11:51 CET	
Date         + 14 Nov 2017         Initial data entry         (294) 20 Nov 2017 11:51 CET	
	æ
Clinical judgement	
Normal      Abnormal - Not clinically significant     Abnormal - Clinically significant	
1 Clinical jude Normal Initial data entry (294) 20 Nov 2017 11:51 CET	
Add nu	ote
9 Dr. Demo User   Viedoc™ 4.53,756.31800   2019-09-04T13-55 CEST 1   39.0   A demo study   Academic Hospital Uppsala d e f g	

1. Subject ID. You can use this dropdown list to navigate to other subjects within the same form, see <u>Navigating</u> between subjects/events within the same form.

2. Event name. You can use this dropdown list to navigate to other events within the same form, see <u>Navigating</u> between subjects/events within the same form.

3. Close. Click to close the form and return to the Details page.

4. Flags showing the status of the form, see the description of these flags above.

5. Show history. Activate the switch to display the history of each form item.

6. Action button. Click to select a field (item) and select the type of action you wish to perform, for example to confirm data as missing or to add a private note. For more information, see <u>Confirm data as missing</u> and <u>Adding private</u> notes.

7. Form history, see Form history PDF.

8. Add note. Click to add a private note to the form, see Adding private notes.

9. Footer of the form, containing the following information:

#### a. User name

- b. Viedoc version number
- c. Date and time of last form edit
- d. The protocol version that the study is based on
- e. Study design version number of the version that is active on the moment the event is initiated
- f. Name of the study
- g. Name of the site

# 2 Initiating an event

There are two types of events that can be initiated for a subject:

- <u>Scheduled events</u> events that were scheduled in advance. These can be events initiated in Viedoc Clinic or subject-initiated events. The subject-initiated events can be initiated only by the subject via Viedoc Me - the filled-in data is visible in Viedoc Clinic afterwards.
- Unscheduled events events that cannot be scheduled in advance.

To start entering data on an event, the event must first be initiated.

The exception is when the event date is configured in the study design to be automatically set and based on the data entered within the event.

Note! When the event date is automatically set, the following apply to the Event date form based on the settings in the study design:

- The Event date form is <u>visible</u> and can be edited if this option is enabled for your study. Queries can be raised on the Event date form.
- The Event date form is <u>not visible</u>. This means that the Event date form is not shown on the Details page, in the Review console, in the Signing console, or in the Issues list, and that it is not possible to raise

queries on the event date. The Event date form is neither included in metrics but still available in the data export.

### 2.1 Scheduled event

To initiate a scheduled event:

- 1 Open the Event date form, in one of the following ways:
  - a Next to the event name, click Set an event date.
  - **b** On the form, click **Event date.**
  - c On the right-side pane, click Scheduled date.
  - d On the right-side pane, click Event date.

Screening	Show deleted forms (1)	Protocol date not set		Û
Screening b	+	Scheduled date not set	0	٩
Check Questions		Event date not set	٩	赵
Physical Examination				

2

In the event date dialog, click **Initiate event** and select the date:

2	JP-40-014	Screening			Close	
0	Screening	g dm cra sov	6	SHOW HISTORY 2		
	🕒 Plan o	event 💽	) Initiate event			
				D Form Hist	tory	

Notel For the events that are already scheduled, the protocol date is also displayed. Entering an event date that is outside the protocol date will raise a warning message.

#### 3 Click Save changes.

The event date dialog closes and the event is initiated. The event status changes to Ongoing.

## 2.2 Unscheduled events

To add and initiate an unscheduled event manually:

#### 1 On the Details page, click **Add new event** in the left-side pane.

Letails						
DE-95-077 BERLIN HOSPITAL STATUS AGE Ongoing 41.1						
29% 4/4 of study events	8/27 forms					
Demographics	DM CRA SDV 🔒 🖌					
Common events	DM CRA SDV 🔒 🗸					
Medical / Surgical History (2)	+					
Prior and Concomitant Medications (0)	+					
Adverse Events (0)	+					
Subject's non-study medications (0)						
Subject's adverse reactions (0)						
Subject's exercise diary (1)						
Subject's daily pain report (0)						
Add new event	٠					

The Add new event dialog opens.

2 Choose the **Event name** from the dropdown list. The events available are the ones that were configured by the study designer as unscheduled events.

### 3 Click Initiate event and select the date:

2	DE-95-077	Add new event	Close	
/	Add new	event		
	Event name Unschedule			
	🕒 Plan e	event 🕞 Initiate event		
		Soff Ann   Viedoc™ 4.68.7923.26999   2 1   40.0   Demo Study   Berl		

#### 4 Click Add event.

The event date dialog closes and the event is added and initiated. The unplanned events will show up in the event slider inserted among the existing events according to the event date. The event status changes to *Ongoing*.

# 3 Entering data

# 3.1 Working in multiple browser tabs

Importantl Working in multiple browser tabs when entering data may cause data conflicts and other serious problems. Therefore it is important to only work in one browser tab when entering or editing data.

# 3.2 Entering data in a form

When the event date is set, automatically or manually, it is possible to start filling in the forms.

To enter data in a form:

#### 1 Open a form by clicking the form bar:

Event date	DM	CRA	SDV	<b>•</b>
Check Questions				+
Physical Examination				٠
Vital Signs				•
Urinalysis				+
Clinical Laboratory				٠

2 Fill in the fields - most fields are self-explanatory when it comes to how they should be filled in:

🖫 кі-09 🔹	Screening [Sep 24 2			Save changes	
Physica ND - Not Done	l Examination	٦			
	cal Examination performe No	ed?	Date of Physical Examination           •         MMM dd yyyy		(÷
Clinically signifi	icant findings should be record	ed in the Me	dical / Surgical History log.		(+
Height 	Body weight	Body /	Mass Index (BMI)		(+
Body System	n	Result			(÷
General Ap	pearance	() N	ormal 🔵 Abnormal 🔵 ND		

#### 3 Click Save changes.

When all the forms in one event are filled in, the event is considered completed and a green check mark appears on the event tab in the event slider.

Below, we explain how to fill in some of the most common fields in a form:

- Dates
- <u>Times</u>
- <u>Ranges</u>
- File upload
- Linking between forms

3.2.1 Dates

You can fill in the date field in two ways:

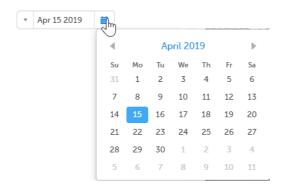
- Click the dropdown menu and select one of the following options:
  - Current date
  - Yesterday
  - Day not knownMonth not

Clear (remove date)

- known
- Apr 15 2019 Charent date Yesterday Day not known Month not known Clear

Apr 15 2019

Click the calendar icon to open the date picker and select a date. Click the arrows to change month.



Tip! You can click the month/year header to view all months of the year, and then click the year header to view a range of years.

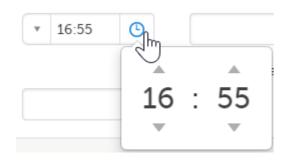
3.2.2 Times

You can fill in the time field in two ways:

- Click the dropdown menu to select the current time:

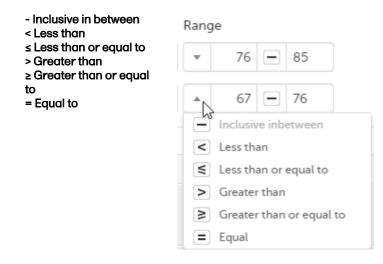
▲ 16:55	٩	
لرح Current time		
Clear		

- Click the clock icon to open the time picker. Click the arrows to select the hour and minute (with a five minutes time interval), or double-click the hour and minute fields to manually enter any hour and minute:



#### 3.2.3 Range

You can define a range of values by selecting a comparator symbol, and then enter the numeric value(s). You can chose between the following comparators:



#### 3.2.4 File upload

#### To upload a file to a form:

1 Click the arrow on the right side of the upload box or click the thumbnail if this is available.



2 Browse for the file to be uploaded and click **Open**. During the upload process:

- A progress bar is showing the upload status.
- You can cancel the file upload by clicking the X button on the right side of the progress bar.
- You can continue editing the form.
- You cannot close the form until the upload process is completed.

3 The uploaded file(s) will be stored once the respective form is saved by clicking Save changes.

You can download an existing file by clicking the file name or by clicking the thumbnail (if it exists). If a drawing pad item was submitted from Viedoc Me it will be available as a downloadable file.

You can remove an uploaded file by clicking the trash can icon on the right side of the file name.

#### Note!

- The file upload icon will display a thumbnail of the image if a jpeg, gif or png file is uploaded. If other file types are uploaded, the icon will only show the file extension.
- The maximum allowed file size is 2 GB.

- The upload of password-protected zip files is not supported, as Viedoc cannot scan these files for viruses.
- For security reasons, it is not possible to upload executable files. See the complete list of unsupported file types in the end of this lesson, in <u>Blacklisted file formats</u>.

### 3.3 Linking between forms

When editing a form, you can add links between different types of forms with the Form link item. This can be useful for example, to quickly see when a medication was taken by a subject and for what reason.

Note! To access the Form link item Clinic users must have access to whichever form type it is configured to link to, for example the Medical History, Adverse events or Prior and Concomitant Medications forms. Viedoc Me does not support forms with Form link items.

Forms can be linked with several instances of a specified form type. For example, while editing the Prior and Concomitant Medications form, links can be made to several registered Medical History events.

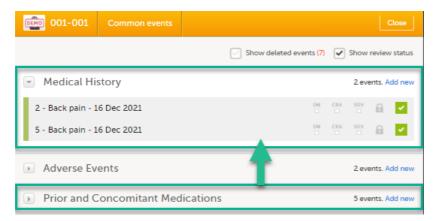
To link two forms:

1 Open a subject card. In this card you can see two Medical History forms under Common events:



2

In this example, we will link the Prior and Concomitant Medications form to the existing Medical History form instances and enter the medication that the subject has taken for the Medical History event.



#### To link the Prior and Concomitant Medications form to the Medical History form instances:

Select Add new in the Prior and Concomitant Medications form.

001-001	Common events				Close
		Show deleted events (	) 🗸	Show	review status
Medical His	story			2 eve	ents. Add new
Adverse Ev	ents			2 eve	ents. Add new
Prior and C	Concomitant Med	ications		4 eve	ents. Add new
3 - Paracetamol	- 16 Dec 2021	DM	CRA	SDV	
4 - Alvedon - 16	Dec 2021	DM	CRA	SDV	A 🔽

In the Prior and Concomitant Medications forms, select **Medical history** to show all existing form instances of the same type. The available link items are shown in a dropdown list.

1. Enter the name of the drug/medication/therapy.

2. Select the relevant Medical history.

3. Select **Save changes** - the Prior and Concomitant Medications form is now linked to the Medical history form instance.

#### **Notes!**

3

4

- The forms in the link item are shown in the order of the earliest date first according to the event date, (and by the order of activities reflecting the order in the design) within each event.
- If a date item is used in the format of a form link item, then the date will be saved in the system language of that user. When the next user edits the form, the language of the date item is automatically updated to reflect the language setting of the editing user.

After saving the form, select any link item to open and read that form. In the example shown below, the Adverse events form. Closing the form returns you to the original form, in this example the Prior and Concomitant Medications form.

001-001 * 3 - Alvedo	on - 16 Dec 2021 🔹		Edit Close
🦸 Form is in view mode. Click 'Edit' to i	make it editable		
Prior and Concor	nitant Medica	tions 🛯 🖀 💱 🔒 🗹	SHOW HISTORY 6
Sequence number 3 Reason for administration Medical history  Adverse event Other	Name of drug / media Alvedon AE Form link 16 Dec 2021 - Headach 16 Dec		Ð
Dose Unit 250 Milligram	•	Dose form Capsule *	Ð
Frequency Twice daily	Œ	Route Oral *	Ē
Start date           *         16 Dec 2021           End date           *         16 Dec 2021	Start time           *         01:20         Image: Compare the second seco	Ongoing? Yes  No	Ð

Notel You can also search in the form link item field. This can be useful to find a specific form instance if there are many adverse events for example.

#### 3.3.1 Updates to linked forms

4

If you update a linked form by resetting, deleting, or changing data, the following occurs:

- The form containing the linked form instance is marked with an issue flag (the red [ i ] icon).
- An error message is displayed at the top of the form containing the link item:

A linked form instance has been updated and needs your review and approval. Click Edit to update the linked form instance and review the form link item. Update as necessary and click Save.

3.3.2 Locations of updated linked forms

In the Issues view of the Selection page, forms are easily identified and are labelled Form link broken:

DEMO	The study is curre	ntly set to operate in demonstration & training mode. Do	not input any real data.	DEMO
Lessue	s *			<u>2</u> .
Search	FOUND 4 ISSUES.		Show all sites	<ul> <li>All open issues</li> </ul>
ID 41	REFERENCE 41	ISSUE DETAIL 41	CONFIRMATION #1	STATE 41
DO1-001 Uppsala	Prior and Concomitant Medications Prior and Concomitant Medications MH Form link	Form link broken 15 Feb 2022 16:23 CET		Form link broken

In the Events view of the Selection page, forms are easily identified and marked with an issue flag (the red [i] icon). Select the red [i] icon to open the subject card.

5	DEMO				The study is currently set to operate in demonstration 6 training mode. Do not input any real data.	DEM
	Lection	· Events *				1
	Search		,0 R	DUND 6 CARDS.	Show event types * Show all sites * Sort by	added date
47	iD 41	Medical H	Adverse E	Prior and		
	oli-003					
	oc-003 😳					
	o02-002	<b>•</b>	<b>•</b>	i		
	o02-001 💼	<b>•</b>		<b>•</b>		
	o01-002 😳	<b>.</b>	<b>•</b>	1		
i	o01-001	<b>•</b>	<b>•</b>	1		

On the subject card, the issue is marked with an issue flag:

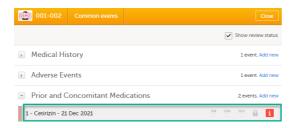
Letails			
002-002 STOCKHOLM Date of informed of 16 Dec 20	-		
11% of study	1/2 events	2/18 forms	
Demographics			
1 form with issue(s)	]		
Common events			
Medical History (1)			+
Adverse Events (1)			+
Prior and Concomitant M	Medications (3)		+
Add new event			٠

# 3.3.3 Updating a linked form

1 Select the red [i] icon to open the issue, (in this example under Common events).

<mark>8</mark> Details			
002-002 STOCKHOLM Date of informed of 16 Dec 20			
11% of study	1/2 events	2/18 forms	
Demographics			
1 form with issue(s)	]		
Common events			
Medical History (1)			+
Adverse Events (1)			+
Prior and Concomitant M	Aedications (3)		+
Add new event			+

2 Select the red [i] icon (in this example under Prior and Concomitant Medications) to open the form with the issue.



3 Select Edit to update the form:

001-002 * 1 - Cetirizi	n - 21 Dec 2021 🍷			Close
1 Form is in view mode. Click 'Edit' to m	ake it editable		J	
A linked form instance has been upd form link item. Update as necessary		approval. Click Edit to update the linked	form instance and review t	he
Prior and Concon	nitant Medicat	ions 🖿 😁 🖬 🚹	SHOW HISTORY 1	0
Sequence number	Name of drug / medic	ation / therapy	Ģ	÷
1	Cetirizin			
Reason for administration	AE Form link			
Medical history	21 Dec 2021 - Utslag			
Adverse event				
Other				
Dose Unit	(÷	Dose form	Ģ	÷
10 Microgram	¥	Tablet *		
	Ģ		ſ	÷.
Frequency		Route	1	-
Once daily *		Oral *		
Start date	Start time	Ongoing?	G	÷
* 21 Dec 2021 📋	· 00:00 (5)	Ves  No		
End date				
* 21 Dec 2021	End time not available			

4 A message is displayed as part of the audit trail when the linked items are updated:

Sequence number	Name of drug / medication / therapy	(
1	paracetamol	
Reason for administration	MH Form link	
Medical history	1	
Adverse event	21 Dec 2021 - vårk	

## 3.4 Navigating between subjects/events within the same form

Once you have a form open, it is possible to navigate through different subjects, or different events, if the form is included in other <u>initiated</u> events as well. This function is available through the dropdown lists in the form header, as illustrated below:

• Navigate through subjects:

📓 NL-UMG-002 🔹			Save changes	
SE-AHU-060	*			
SE-AHU-061				( <del>f</del> )
SE-AHU-062				
SE-AHU-063				
SE-AHU-064	ould be recorded in t	the Medical / Surgery history log		(÷
			💽 Add n	note

• Navigate through events:

🚨 NL-UMG-002 🐣	Visit 1 [21 Sep 2018] *	Save changes Close
Vital Signa	Add subject [21 Sep 2018]	
Vital Signs	Visit 2 [28 Sep 2018]	
Were Vital Signs meas	Visit 3	Ð
🔵 Yes 🔵 No		
		6
Clinically significant f	ndings should be recorded in the Medical / Surgery history	og
		Add note

# 4 Editing data

To edit data that already have been saved:

1 Open the form that contains the data you want to change.

### 2 Click Edit in the top right corner of the form.

	Visit 1 (01 Nov 2017) ick 'Edit' to make it editable			Edit form
Blood pressure Systolic (1) 120 mmHg	Diastolic 🚺 60 mmHg	(+)	Pulse Rate 1 68 bpm	(÷
Were Vital Signs mea Yes No	sured? Date and time           v         01 Nov 20	017 00:00	6	Ē
Clinically significant f	indings should be recorded	d in the Med	ical / Surgery history log	(÷
			,O F	orm History 🌈 Add note

3 Edit the data and click **Give reason**. A dialog opens.

Result	
Choose reason for changed value	
<ul> <li>Query resolution</li> <li>Other reason (describe below)</li> </ul>	
Ready	Cancel

4 Select one of the pre-formulated reasons for change, or click **Other reason** and provide a description. Click **Ready** and **Save changes**.

#### Notel

- A form that has been locked by the Monitor or Data Manager cannot be edited. If you anyway want to edit a locked form, contact your Monitor.
- Subject-submitted (Viedoc Me) forms are locked by default. If you, together with the subject, consider that changes need to be made to the answers in a subject-submitted form, contact your Monitor.
   Depending on the settings for your study, your Monitor might have the possibility to unlock the subjectsubmitted form.

# 5 Repeating forms

It is possible to create several instances of the same form within one activity. This can only be done if the form is set as repeating in the study design.

If a form is set as repeating, a ghost form will appear once you have filled in and saved the first instance of the form (see the lab form example in the image).

Visit 2 Congoing					
Visit date		QA.	sgv		<b>•</b>
- Enrolment					
Eligibility	DM T	- 03A 	SQV X		
Check Questions	DM	- QA.	59V	, <b>B</b> .,	i
Vital Signs	DM Y	QA Y	sey.		
12-Lead ECG	U.	QA.	sgy		<b>×</b>
Visit status					٠
Medical / Surgical History					٠
Lab	U.	QA.	$\frac{100}{2}$	,0,	~
Lab	DM Y	CJA Y	sov X		
+ Lab .5					

Note! The ghost form of a repeating form is displayed <u>below</u> the main form and marked with a + icon. If you see a ghost form <u>above</u> the main form, it is a copyable form. See the image below, and see <u>Copyable forms</u>.

Visit 2 Congoing				
Visit date	DM	CRA	SDV	i
Pre-dose				
Check Questions	DM	CRA	SDV	~
Vital Signs	DM	CRA	SDV	~
12-Lead ECG	DM	CRA	SDV	~
Visit status	DM	CRA	SDV	~
Lab				٠
Post-dose				
Lab				٠
Safety Laboratory Parameters				٠
🖪 Test form that is copyable				
Test form that is copyable				٠
Test form that is repeatable	DM	CRA	SDV	~
+ Test form that is repeatable				

1. Main form instance of repeating form

2. Ghost form of a <u>repeating form</u>, displayed below the main form instance and marked with a + icon

3. Main form instance of a <u>copyable form</u>

4. Ghost form of a copyable form, displayed above the main form instance and marked with a copy icon

To fill in an instance of a repeating form:

1 Click the ghost form. A new instance of the form opens.

# 2 Fill in the form instance and click **Save changes**. If you have not reached the maximum allowed number of instances of a repeating form, a ghost form appears every time you save a new instance of the form. If the maximum number of instances of the repeating form is reached, no ghost form will appear upon saving a new instance of the form.

To delete an instance of a repeating form:

- 1 Open the respective instance of the form and click Edit.
- 2 Click Delete form.
- 3 Select or enter a reason for deleting the form and click **Delete**. The instance of the form is removed.

Note!

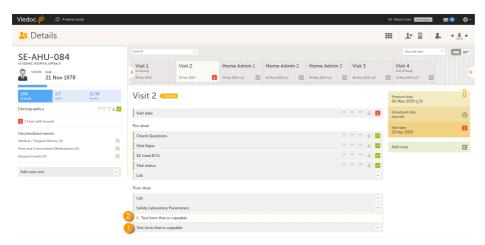
- It is not possible to reset a repeating form. If you wish to clear the data, it is only possible to completely delete that specific instance of a repeating form and create a new one again.
- In order for the event to be considered as completed, at least one instance of a repeating form must be filled in.



# Copyable forms

It is possible to initiate a form based on copied data from a previous event. This can only be done if the form is set as copyable in the study design.

If a form is set as copyable, a ghost form will appear above the main form.



1. Main form - click the main form to enter data manually. Data from the same form in a previous event will not be copied into this form in the current event.

2. Ghost form - click the ghost form to initiate the form by copying data from a previous event. See below for instructions.

Notel The ghost form of a copyable form is displayed <u>above</u> the main form, and marked with a copy icon. If you see a ghost form <u>below</u> the main form, it is a repeating form. See the image below, and see <u>Repeating forms</u>.

Visit date	DM CRA SDV	
re-dose		
Check Questions	DM CRA SDV	
Vital Signs	DM CRA SDV	
12-Lead ECG	DM CRA SDV	
Visit status	DM CRA SDV	
Lab		
lost-dose		
Lab		
Safety Laboratory Parameters		
Test form that is copyable		
Test form that is copyable		
Test form that is repeatable	DM CRA SDV	6

1. Main form instance of repeating form.

- 2. Ghost form of a <u>repeating form</u>, displayed below the main form instance and marked with a + icon.
- 3. Main form instance of a <u>copyable form</u>.
- 4. Ghost form of a copyable form, displayed above the main form instance and marked with a copy icon.

If the copyable form is also set as repeating (see <u>Repeating forms</u>), and in the previous event, three instances of that form have been initiated, then in the current event all three instances appear as ghost form. By clicking one of these ghost forms, you can select the instance from which the data are copied.

To initiate a form based on data copied from a previous event:

Click the ghost form.

SE-AHU-084	Search									
scademic Hospital uppsala status do8 21 Nov 1978	Visit 1 Screening 29 Apr 201		Visit 2 29 Apr 2019	Home Admi	n 1	Home Admin 2	Home Admir		Visit 3 06 May 2019	
28% 2/7 11/38 of study visits forms	Visit	2 👧	ing							
Demographics	Visit da	te						046 10	94 - 597 - <b>B</b>	i
1 form with issue(s)	Pre-dose									
Unscheduled events		Questions						EM C	SAA 507 @	
Medical / Surgical History (0) Prior and Concomitant Medications (0)	+ + Vital Sig	ins						046 C	64 597 B	
Adverse Events (0)	+ 12-Lea	ECG						200 []	5 57 B	
	Visit sta	tus						DM C	94 - 97 - B	
Add new visit	+ Lab									
	Post-dos									
	Lab									+
	Safaty	aboratory P	arameters							

A dialog opens asking you to confirm whether you want to create a form instance by copying data from a previous event.

Confirm form	n copy Cancel
i	You are about to create a form instance by copying data values from a previous visit. Are you sure you want to continue?
	Confirm Copy

#### 2 Click **Confirm** to continue.

An instance of the form opens, pre-filled with data from the previous event.

🚨 SE-AHU-084 🔻	Visit 2 [29 Apr 2019] 🔹	Edit
🦸 Form is in view mode. C	lick 'Edit' to make it editable	Close
Test form th	nat is copyable 📲 🖷 🖬 🗹	SHOW HISTORY 1
This is an example o	f a copyable form.	(+
Fill in a number	Date and Time           *         29 Apr 2019 00:00	Ð
Fill in a text This form has been	filled in during Visit 1	Ð
		P Form History Add note

3

- If you want to save the form as is, click **Close**. The form will be saved containing the copied data.
- If you want to make any changes, click Edit. Edit the fields you would like to change. Click Give reason and provide a reason for change. Click Ready, and Save changes to save the changes to the data.

The ghost form disappears and the form is displayed as initiated.

#### To delete a copied form:

1 Open the form and click **Edit**.

- 2 Click Delete form.
- 3 Select or enter a reason for deleting the form and click Delete. The copied form is removed and the ghost form re-appears.

Note!

- A form instance based on copied data always contains the data of the previous event, even if data have been changed during that event. If a copyable form is included in Event 1, 2 and 3, and the data is copied from Event 1 to Event 2, edited during Event 2, and then copied to Event 3, the changes made during Event 2 are included in the data copied into Event 3.
- A form instance based on copied data always contains the latest saved data from the previous event at the moment of copying. Any changes performed to the form instance from which the data are copied (the source) after the copy action are not reflected in the form instance containing the copied data (the destination).

# Confirming data as missing

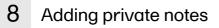
To mark the data as missing, if you are not able to provide information in a field:



#### Click the action icon in the top right corner of each field group:

E SE-AHU-031 * Visit 1  20	Nov 2017) *	Save changes Close
Vital Signs		
Were Vital Signs measured?	Date and time       *     20 Nov 2017 (	0
Heart rate	Body temperature	Ce
bpm <b>i</b> Body temp: Confirmed as missing! 7	eC	Awaits approval
A dialog opens.		

- 2 Select the field for which the data is missing in the dropdown menu.
- 3 Select Confirm field is missing and provide a reason. Notel The Confirm field is missing action is only shown for the fields that are set as "Required" in the study design.
- Click Ready. Below the field, the text Confirmed as missing is displayed, together with the reason 4 provided above.



You can add private notes for:

- Events
- Forms
- Single fields (items)

Note! It is only possible to add private notes if this feature is enabled for your role.

#### 8.1 Private notes for events

You can add private notes to every event. Private notes are only visible to the user that created the notes, and can only be edited by that user. Adding or editing a private note does not break the signature. It is possible to add as many notes as you like. Notes are ordered according to date in descending order.

To add a private note for an event:

- 1 Click Add note on the right pane of the Details page.
- 2 Enter the note text and click **Ready**.
- 3 Click Save changes. The notes dialog closes.

To add another note:

- 1 Click Open notes.
- 2 Click Add another note.
- 3 Enter the note text and click Ready.
- 4 Click Save changes. The notes dialog is closed and the new note is displayed in the right pane of the Details page.

To edit an existing note:

- 1 Click Open notes.
- 2 Click the pen icon behind the note you want to edit.
- 3 Edit the note text and click Ready.
- 4 Click **Close**. The notes dialog is closed.

#### To delete a private note:

- 1 Click Open notes.
- 2 Click the trash can icon behind the note you want to delete.
- 3 Click Save changes. The notes dialog closes.

To see a history of changes to private notes, activate the **Show history** switch. Private notes are not recorded in the audit trail, neither included in the data export.

#### 8.2 Private notes for forms

You can add private notes to every form. Private notes are only visible to the user that created the notes, and can only be edited by that user. Adding or editing a private note does not break the signature.

To add a private note for a form:

- 1 Click Add note on the bottom of the form.
- 2 Enter the note text and click **Save note**. The note dialog closes and the note is displayed on the form.

## 8.3 Private notes for fields

You can add private notes to single fields in a form. Private notes are only visible to the user that created the notes, and can only be edited by that user. Adding or editing a private note does not break the signature.

To add a private note for an event:

Click the action icon in the top right corner of the field group. A dialog opens. Select the field you would like to add the private note to.

SE-AHU-024 🔹 Visit 3 [14	Nov 2017] 👻	
🗶 Form is in read-only mode.	Add new action	
12-Lead ECG 👳 🥲	Select a field SHOW HISTORY	
Was 12-Lead ECG performed?	Select a field Was 12-Lead ECG performed? Date	(÷
	entry   Elise Langenkamp (294) 20 Nov 2017 11:51 CET a entry   Elise Langenkamp (294) 20 Nov 2017 11:51 CET	
Clinical judgement <ul> <li>Normal</li> <li>Abnormal - Not</li> </ul>	clinically significant 🔘 Abnormal - Clinically significant	(÷
Clinical jud Normal Initial	data entry   Elise Langenkamp (294) 20 Nov 2017 11:51 CET	
	D Form History C Add n	ote

2 Enter the note text and click **Ready**.

1

Add new action	
Select a field	
Was 12-Lead ECG performed?	¥
Choose type of action	
● Add a private note 🖡	
Add note text here	
Private note to the field	li
Ready	Cancel
Ready	

#### Click Save changes.

3

The notes dialog closes and the note is saved at the bottom of the field group.

SE-AHU-024 * Visit 3 [14 Nov 2017] *	Close
🗶 Form is in read-only mode.	
12-Lead ECG 🛛 🥲 🕲 🖬 🔽	SHOW HISTORY 1
Was 12-Lead ECG performed?         Date                • Yes          No               * 14 Nov 2017 00:00                 • • • • • • • • • • • • •	(+)
🖡 Was 12-Lea: Private note to the field	
🖄 Was 12-Lea 🔹 Yes Initial data entry   Elise Langenkamp (294) 20 Nov 2017 11:51 CET	
Date   + 14 Nov 201 Initial data entry   Elise Langenkamp (294) 20 Nov 2017 11:51 CET	
Clinical judgement <ul> <li>Normal</li> <li>Abnormal - Not clinically significant</li> <li>Abnormal - Clinically significant</li> </ul>	( <del>]</del> )
Clinical judg • Normal Initial data entry   Elise Langenkamp (294) 20 Nov 2017 11:51 CET	
O Form Hi	istory 🖍 Add note
Dr. Demo User   Viedoc™ 4.53.7156.31800   2019-09-04T13:55 CEST 1   39.0   A demo study   Academic Hospital Uppsala	

# 9 Resolving a query

For complete instructions on how to resolve a query, see Resolving queries.

#### See also:

- The video tutorial <u>Issues: Resolve a query</u>
- Overview of the queries process and workflow in Viedoc Queries overview

# 10 Audit trail and form history

You can view the history of a form, including information on who entered the initial data and who made any changes. To view the history, activate the **Show history** switch on the top right side of the form:

🚨 SE-AHU-024 👗	Visit 3 [14 Nov 2017] 🔹	Close
🄀 Form is in read-only me	ode.	
12-Lead ECO	G 🤫 🕫 🐨 🖬 🗹	
Was 12-Lead ECG pe Yes No	rformed? Date           *         14 Nov 2017 00:00	(+)
Clinical judgement	normal - Not clinically significant 🔵 Abnormal - Clinically significant	(÷)
	Porm Histor	y Add note

# 10.1 Limited number of audit trail records

To make the form history and the form history PDFs more manageable in terms of size, there is a limit to the number of displayed audit trail records. The history only displays the initial data entry and the latest 25 audit trail records. If there are more records, a message is displayed:

Date of sam . 31 Mar 202( Initial data entry 31	Mar 2020 15:52 CEST
😵 Date of sam 🗿 more audit trail records exist - see the CSV or Excel data	a export for details
Date of sam 31 Mar 202( > 30 Mar 202( Transcription error	17 Jan 2022 09:52 CET
Date of sam 30 Mar 202( + 31 Mar 202( Transcription error	17 Jan 2022 09:53 CET
Date of sam 31 Mar 202( = 30 Mar 202( Transcription error	17 Jan 2022 09:53 CET
Date of sam 30 Mar 202( + 31 Mar 202( Transcription error	17 Jan 2022 09:53 CET
Date of sam 31 Mar 202( + 30 Mar 202) Transcription error	17 Jan 2022 09:54 CET
Date of sam 30 Mar 202( + 31 Mar 202( Transcription error	17 Jan 2022 09:56 CET
Date of sam 31 Mar 202( > 30 Mar 202( Transcription error	17 Jan 2022 09:56 CET

To see the complete form history, export to CSV or Excel. For more details on how to download and export the Admin Audit trail please select this <u>link</u>.

**Notel** It is not very likely that clinic staff would make more than 25 edits to a field. However, when working with JavaScript functions, that is a possibility.

# 10.2 Form history PDF

You can download PDFs of all the saved versions of the form by clicking **Form History** located on the bottom right side of the form.

If any of the fields in the form are hidden for your role, you are not able to see the form PDFs.

By clicking **Form History**, a list with all the form versions is displayed, and you can choose which version you want to download. There is one version of the form for each change performed on the <u>eCRF</u>.

FOF	Version 2	19 May 2022 14:57 CEST
2	Revision applied Revision applied 1.4 Revision applied 1.5	19 May 2022 15:01 CEST 19 May 2022 15:06 CEST
POF	Version 1	
Adobe	Saved by Initial data entry	19 May 2022 14:53 CEST

1. The user name of the user who saved the edited form.

2. "Revision applied" is displayed when a user has updated the form according to a new design revision. This can be done in one of two ways:

- Manually edit a specific form
- Manually perform a batch update of all forms with a pending upgrade

3. "Revision applied X.Y <Study Manager user name> <date time>" is displayed when the system has automatically updated the form according to a new design revision. This happens if the update in the revision does not affect the data integrity.

The PDF shows a screenshot of the form with the editing history included:

	SE-AHU-071   12-Lead ECG   Visit 2 [29 Mar 2018]   Academic Hospital Uppsala   A demo study
	(1) (2) (3) (4) (5)
SE-AHU-071	Visit 2 [29 Mar 2018]
12-Lead E	CG
Was 12-Lead EC	
Yes      No	▼ 29 Mar 2018 00:00 🗰 🕓
Was 12-Lead EC	CG performed? FYes Initial data entry   Technical Writer (304) 29 Aug 2018 11:15 CEST
	Mar 2018 00:00 Initial data entry   Technical Writer (304) 29 Aug 2018 11:15 CEST
Clinical judgeme	at
Normal	Abnormal - Not clinically significant O Abnormal - Clinically significant
Clinical judgement	nt Normal Initial data entry   Technical Writer (304) 29 Aug 2018 11:15 CEST
	Technical Writer   Viedoc™ 4.45.6813.16847   2018-08-29T11:15 CEST 1   57.0   A demo study   Academic Hospital Uppsala
	- 1
	and the second second second second second second
	67890

Technical Writer | 1 | Viedoc™ 4.45.6813.16847 | 2018-08-29T11:15 CEST | Page 1 of 1

The page header and footer provide the following information, as illustrated in the previous image:

- 1. Subject ID
- 2. Form name
- 3. Event info (in the format set in the study design)
- 4. Site name
- 5. Study name
- 6. User name the user who last edited the form
- 7. Version number the version of the eCRF
- 8. Viedoc version number
- 9. Date and time when the form was last edited
- 10. Page number out of total number of pages of the PDF document

## 10.3 Masking of sensitive data

If sensitive data has been entered into a form, it is possible to mask such data so that it is not visible in the form history (except for roles with the specific permission). Sensitive data can, for example, reveal information about a subject's name or gender.

To mask sensitive data in the form history, your role must have the permission to anonymize data. The permission is set up in Viedoc Designer.

When sensitive data has been entered into a form, you first need to edit the data into something <u>not</u> sensitive, see <u>Editing data</u>. Then a record in the form history is created.

10.3.1 Masking text

To mask sensitive text data in the form history:

- 1 Click **Show history** in the top right corner of the form to open the form history.
- 2 For the history record with the sensitive data, click the **Changed value** icon.

NO-s1-002 * V1 [20 Au	g 2020] 🔹	Edit Close
Form is in view mode. Click 'Edit to n Visit1 How do you feel? dizzy How do you How do	Changed value How do you feet? Old value sensitive data 20 Aug 2020 09:09 CEST Anonymize subject data New value dizzy	
		P Form History
	Viedoc <sup>™</sup> 4.60.7531.25426   2020-08-20T09:10 CEST 42   2.0     newsite1	

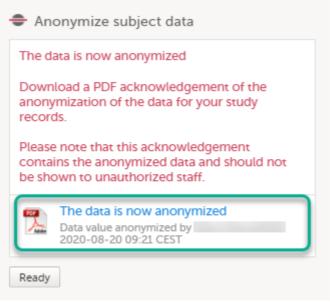
- 3 Click Anonymize subject data.
- 4 In the dialog that is displayed, select Anonymize data value and click Continue.

Anonymize subject data	
Click "Continue" to anonymize the sele data value. Please note that this action be undone.	
Data value	
sensitive data	
<ul> <li>Anonymize data value</li> </ul>	
Continue	Cancel

5 Enter your password and select **Submit**.

The dialog now displays a text confirming that the data is anonymized. Click Ready.

Note! All masking actions are logged so that it is possible to see when they were made and by whom.



Notel When the data has been masked, a PDF acknowledgement is created. The PDF contains information about what has been masked, when and by whom it was done. To download the PDF, click the link in the dialog. It is recommended to archive the PDF together with your study documentation.

7 The form history now displays asterisks in place of the sensitive data.

📄 NO-s1-002 🔭 V1 [20 Au		Edit Close
1 Form is in view mode. Click 'Edit' to m	Changed value	
Visit1 😁 😁 🖴 🗹	How do you feel?	SHOW HISTORY 2
How do you feel?	(838) 20 Aug 2020 09:09 CEST Data value anonymized by 20 Aug 2020 09:21 CEST	Ð
1 How do you + ***** Initial	New value	
1 How do you ****** dizzy	dizzy Reason	
	Transcription error 20 Aug 2020 09:10 CEST	(f)
	Close	

Notel The masked data will be masked also in an export.

Note! Anonymization of data in linked forms does not affect the form link items, these have to be anonymized separately.

#### 10.3.2 Masking a filename

To mask a sensitive filename in the form history:

1 Click **Show history** in the top right corner of the form to open the form history.

For the history record with the sensitive filename, click the **Changed value** icon.

NO-s2-003 * V1 [20 Aug 20	220] ·	Edit Close
1 Form is in view mode. Click 'Edit' to make i	teditable	
Visit1 🔤 🛤 🖬 🖬 🔽	Changed value	SHOW HISTORY 2
How do you feel? fine	Old value sensitive.png (33.7 KB, 6390c40dcbdcccb42c2af325900b6738) 20 Aug 2020 10:04 CEST Download file Anorymize subject data	Ð
File upload	new file.png (33.7 KB, 6390c40dcbdcccb42c2af325900b6738) Reason Wrong file 20 Aug 2020 10:06 CEST Download file Close	Ð
Eve upload         • sensitive.pn         Initial           File upload         sensitive.pn         • new file		
		Form History

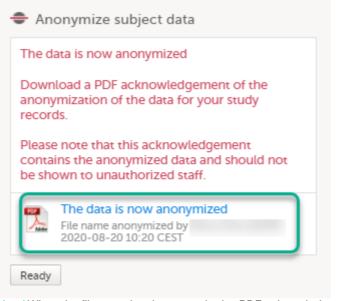
3 Click Anonymize subject data.

2

4 In the dialog that is displayed, select **Anonymize file name** and click **Continue**.

Anonymize subject data	
Select the file name data value or file con that needs to be anonymized and click "Continue". Please note that this action ca be undone.	
File name	
sensitive.png (33.7 KB, 6390c40dcbdcccb42c2af325900b6738)	
<ul> <li>Anonymize file name</li> </ul>	
File content	
sensitive.png (33.7 KB, 6390c40dcbdcccb42c2af325900b6738)	
Anonymize file content	
Continue	Cancel

5 Enter your password and click Confirm.



**Notel** When the filename has been masked, a PDF acknowledgement is created. The PDF contains information about what has been masked, when and by whom it was done. To download the PDF, click the link in the dialog. It is recommended to archive the PDF together with your study documentation.

7 The masked filename is now no longer visible in the form history.

NO-s1-005 * V1 [25 Aug		Edit		
1 Form is in view mode. Click 'Edit' to m	Changed value			
Visit1 😁 😁 🖬 🗹	File upload Old value	SHOW HISTORY	2	
How do you feel? ok How do you • ok Initial da	*******         (337 KB, 6390c40dcbdccc42c2af325900b6738)           25 Aug 2020 09:42 CEST Download file File name anonymized by         25 Aug 2020 09:43 CEST           • Anonymize subject data         25 Aug 2020           New value         6390c40dcbdcccb42c2af325900b6738)           rew file.png (33.7 KB, 6330c40dcbdcccb42c2af325900b6738)         25 Aug 2020			<b>(</b>
	wrong file			
	25 Aug 2020 09:42 CEST Download file			
File upload	Close			( <del> </del>
	tial data entry   25 Aug 2020 09:42 CEST file.pnc   vrong file   25 Aug 2020 09:42 CEST			
		D For	n His	tory

#### 10.3.3 Masking file content

1 Click **Show history** in the top right corner of the form to open the form history.

For the history record with the sensitive file content, click the **Changed value** icon.

NO-s2-003 * V1 [20 Aug 20	)20] T	Edit Close
1 Form is in view mode. Click 'Edit' to make it	editable	
Visit1 🔤 😳 🖬 🔽	Changed value	SHOW HISTORY 2
How do you feel? fine	Old value sensitive.png (33.7 KB, 6390c40dcbdcccb42c2af325900b6738) 20 Aug 2020 10.04 CEST Download file Anonymize subject data	Ð
File upload	new file.png (33.7 KB, 6390c40dcbdcccb42c2af325900b6738) Reason wrong file 20 Aug 2020 10:06 CEST Download file Close	Ð
Sreupload         • sensitive prinitial           File upload         sensitive pri • new file.		
		Form History

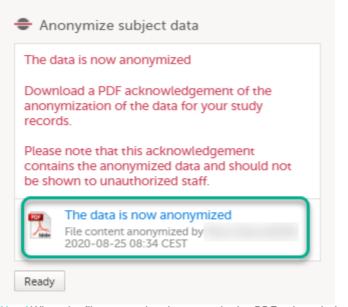
3 Click Anonymize subject data.

2

4 In the dialog that is displayed, select **Anonymize file content** and click **Continue**.

🗢 Anonymize subject data	
Select the file name data value or file con that needs to be anonymized and click "Continue". Please note that this action of be undone.	
File name	
sensitive.png (33.7 KB, 6390c40dcbdcccb42c2af325900b6738	)
Anonymize file name	
File content	
sensitive.png (33.7 KB, 6390c40dcbdcccb42c2af325900b6738	)
Anonymize file content	
Continue	Cancel

5 Enter your password and click Confirm.



Notel When the file content has been masked, a PDF acknowledgement is created. The PDF contains information about what has been masked, when and by whom it was done. To download the PDF, click the link in the dialog. It is recommended to archive the PDF together with your study documentation.

7 The masked file is now no longer accessible in the form history.

Changed val	lue
File upload	
Old value	
sensitive.png (3 6390c40dcbdc	3.7 KB, ccb42c2af325900b6738)
1944 - 1944 - 1948)	25 Aug 2020 08:32 CEST Download file
File content anony 2020 08:34 CEST	mized by 25 Aug
Anonymize subje	ect data
New value	
new file.png (3 6390c40dcbdc	3.7 KB, ccb42c2af325900b6738)
Reason	
wrong file	
	25 Aug 2020 08:33 CEST Download file
	Close

## 10.4 Consequences of masking data

#### 10.4.1 Data exports

Historical data exports that were created before the data masking can no longer be downloaded because such exports could include the data that was later masked.

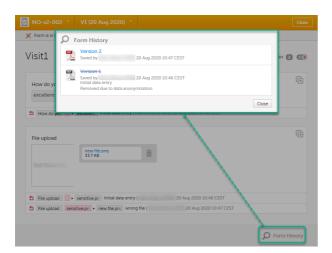


### 10.4.2 Form PDFs

When data has been masked, it is reflected in all form PDFs.

File upload					
	new file.png 33.7 KB	童			
File upload	▶ ****** (33.7 KB, 6390c40d	cbdcccb42c2af325900b6	738) Initial data entry	25 Aug 2	020 09:42 CEST
File upload	****** (33.7 KB, 6390c40dcbdo	ccb42c2af325900b6738)	<ul> <li>hew file.png (33.7 KB)</li> </ul>	6390c40dcbdcccb42c2af3	25900b6738) wron

For a form version with masked data, and for all previous form versions, all form PDFs become unavailable because they could include the data that was masked.



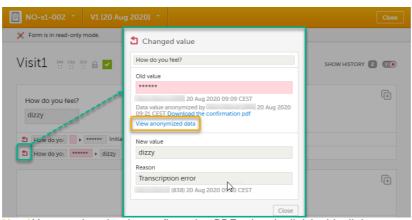
# 10.5 Viewing masked data

For roles with the permission to view anonymized data, it is possible to view masked data in the form history. The permission is set up in Viedoc Designer.

To view masked data:

1 Click **Show history** in the top right corner of the form to open the form history.

2 For the history record with the masked data, click the **Changed value** icon.



Notel You can download a confirmation PDF using the link in this dialog.

#### 3 Click View anonymized data.

4 For masked text and filenames, the sensitive data is immediately displayed in the field **Old value**.

For masked file content, the disabled download link for the file is enabled.

Changed value	3
File upload	
Old value	
sensitive.png (33.7 6390c40dcbdccc	7 KB, b42c2af325900b6738)
20	Aug 2020 10:46 CEST Download file
File content anonymiz	zed by 20 Aug
-	
View anonymized data	
New value	
new file.png (33.7 6390c40dcbdccc	KB, b42c2af325900b6738)
Reason	
wrong file	
20	Aug 2020 10:47 CEST Download file
	Close

Note! From this dialog, you can download a confirmation PDF. The PDF contains masked data and should not be shown to unauthorized staff.

# 11 Blacklisted file formats

The following executable file types are considered as high risk because essentially all computers with the listed operating system installed can carry out the commands contained in the executable file.

In other words, files with the extensions listed below can be executed with some basic part of Windows, Mac OS, Linux, and so on.

Due to this, the following file formats will not be accepted by Viedoc form file loader:

Extension	Format	Operating system(s)
ACTION	Automator Action	Mac OS
АРК	Application	Android
APP	Executable	Mac OS
BAT	Batch File	Windows
BIN	Binary Executable	Windows, Mac OS, Linux
CMD	Command Script	Windows
СОМ	Command File	Windows
COMMAND	Terminal Command	Mac OS
CPL	Control Panel Extension	Windows
CSH	C Shell Script	Mac OS, Linux
EXE	Executable	Windows
GADGET	Windows Gadget	Windows
INF <sup>1</sup>	Setup Information File	Windows
INS	Internet Communication Settings	Windows
INX	InstallShield Compiled Script	Windows
IPA	Application	iOS
ISU	InstallShield Uninstaller Script	Windows
JOB	Windows Task Scheduler Job File	Windows
JSE	JScript Encoded File	Windows
KSH	Unix Korn Shell Script	Linux

Extension	Format	Operating system(s)
LNK	File Shortcut	Windows
MSC	Microsoft Common Console Document	Windows
MSI	Windows Installer Package	Windows
MSP	Windows Installer Patch	Windows
MST	Windows Installer Setup Transform File	Windows
OSX	Executable	Mac OS
OUT	Executable	Linux
PAF	Portable Application Installer File	Windows
PIF	Program Information File	Windows
PRG	Executable	GEM
PS1	Windows PowerShell Cmdlet	Windows
REG	Registry Data File	Windows
RGS	Registry Script	Windows
RUN	Executable	Linux
SCR	Screensaver Executable	Windows
SCT	Windows Scriptlet	Windows
SHB	Windows Document Shortcut	Windows
SHS	Shell Scrap Object	Windows
U3P	U3 Smart Application	Windows
VB	VBScript File	Windows

Extension	Format	Operating system(s)
VBE	VBScript Encoded Script	Windows
VBS	VBScript File	Windows
VBSCRIPT	Visual Basic Script	Windows
WORKFLOW	Automator Workflow	Mac OS
ws	Windows Script	Windows
WSF	Windows Script	Windows
WSH	Windows Script Preference	Windows



Resetting and deleting data

# Resetting and deleting data

Published by Viedoc System 2022-02-10

 1. Introduction

 2. Resetting a form

 2.1 Resetting a radio button in a form

 3. Deleting a common event

 4. Deleting an unscheduled event

 5. Resetting the event status

 6. Deleting a subject



This lesson describes how to delete a subject, a form, or an event.

Notel No data, even if deleted or reset, is actually removed from the database. It is only marked as "deleted" and will not appear in the export output.

Important! Although no data is deleted from the database, it is <u>not possible</u> to revert any deleted data. Therefore, please make sure to double-check the data before you delete the data. If any data is deleted by mistake, the deleted data is still available for preview and can be re-entered manually based on the old records.

To view deleted forms, select Show deleted forms in the upper right corner of the form on the Details page.

## 2 Resetting a form

Resetting a form means that all data in the form is erased and the fields in the form appear empty again.

The old data in the form is still available for tracking purposes and can be accessed by activating the **Show deleted** forms checkbox on the **Details** page:

Viedoc < 🗅 🛛 A demo study				I	Dr. Demo User Investigator	⊠ <b>⊙</b> •
🄱 Details					1º 4	<u>₽</u> , 4 <u>1</u> , >
NL-UMG-002		Show all visits *				ER.E. 88°
UNIVERSITY MEDICAL CENTER GRONINGEN STATUS DoB Ongoing 12 Nov 1964		Visit 1 Visit 2 Screening 21 Sep 2018 28 Sep 2018	Visit 3 End of Study 18 Oct 2018	8		Þ
33% 4/4 10/30 of study visits forms		Visit 1 Corgoing		Show deleted forms (D	Protocol date not set	ე
Demographics	양 왕 🔒 🔽	Visit date		📀 😁 🚥 🗤 🔒 🗹	Scheduled date not set	©
Unscheduled events		Check Questions		Q 🖱 📅 🖉 🖨 🗹	Visit date 21 Sep 2018	赵
Medical / Surgical History (0) Prior and Concomitant Medications (0)	•	Physical Examination Vital Signs			Add note	ß
Adverse Events (0)	*	12-Lead-ECG	V	DELETED		
Add new visit	٠	12-Lead ECG Body measurements		* 연 연 일 🖬 🔽		
		Safety Laboratory Parameters				
		Eligibility		OM (8A SOY 🖻 🗹		
		Visit status		🥥 🖤 🐏 🕾 🗹		
		Clinical chemistry				
		Lab				

1

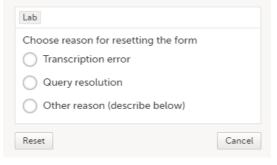
2

Open the form and click **Edit** in the top right corner. The **Reset form** icon appears in the bottom left corner of the form.

SE-01-013 T , 14 Mar 2018: NO PAIN T		Close
Treatment Treatment administration		
Was the medication administread No      Yes		Ð
C Reset form	P Form History	Add note

#### Click Reset form.

A pop-up appears asking for the reason for resetting the form.



3

Enter the reason and click Reset.

#### Notel

- Any open queries in a form that is reset will automatically be closed by the system.
- If you cannot see the reset icon after clicking Edit, please contact your Site Manager or Study Manager for assistance. It might be possible that your role does not include permission to reset forms.

### 2.1 Resetting a radio button in a form

In case you made a selection in a radio button and want to return to the state in which no option is selected, you can reset the radio button. To reset a radio button, click the selected radio button again, and it will be deselected:

🚨 SE-AHU-080 👗	Visit 1 (01 Jan 2019) 🍷		Save changes	Close
Physical Exa Clinically significant finding:		I/Surgical History log (screening) / Adverse Event log (	post screening)	
Was a Physical Exami	nation performed?	Reason not performed		(÷
			Add Add	note
SE-AHU-080 👗	Visit 1 [0] Jan 2019] 🍷		Save changes	Close
Physical Exa Clinically significant finding		I/Surgical History log (screening) / Adverse Event log	(post screening)	
Was a Physical Exam	nation performed?			(+)
			Add Add	note

## 3 Deleting a common event

To delete a common event such as Adverse Event, Concomitant Medications or Medical History:

- 1 Open the event and click **Edit** in the top right corner.
  - The **Delete event** icon appears in the bottom left corner of the form.

Auverse	Lvent			
AE Id	Description			( <del>)</del>
1	Pain			
Start Date   O1 May	2018 00:00 🗯 (	Ongoing? Yes • No	End Date           •         02 May 2018 10:30	<b>i o</b>
Severity Mild	Moderate O Sever	Serious? e 🔵 Yes 💿 No		Ð
Causality Probable	Action T • Dose re		Outcome of Adverse Event	·
💼 Delete ev	ent			P Form History

#### Click Delete event.

A pop-up appears asking for the reason for deleting the event.

Adverse Event	
Choose reason for deleting the event	
<ul> <li>Transcription error</li> </ul>	
O Query resolution	
Other reason (describe below)	
Delete	Cancel

3

2

Provide the reason and click **Delete**. The event is deleted but available for tracking purposes in the history.

#### Note!

- Any open queries in a deleted event will automatically be closed by the system.
- If you cannot see the delete icon after clicking Edit, please contact your Site Manager or Study Manager for assistance. It might be possible that your role does not include permission to delete events.

## 4 Deleting an unscheduled event

If you have added an event manually using the **Add new event** button (see <u>Entering/Editing data</u>), you can remove the manually added event if it does not contain any data. If any form within a manually added event is completed, the form needs to be reset before the event can be deleted.

To delete a manually added event:

Open the event and click **Event date**.

he Event of	date form opens.	
<b>B</b> DE-95-077	Unscheduled [16 09 2021]	Close
Unsched	uled 🖿 📪 🖬 🖌	SHOW HISTORY 1
Event date		
16 09 2	2021	<b></b>
	Delete event	
		S Form History

#### 2 Click Delete event.

A pop-up appears asking for the reason for deleting the event.

💼 Event date	
Choose reason for deleting this event	
<ul> <li>Transcription error</li> </ul>	
O Query resolution	
Other reason (describe below)	
Delete	Cancel

3 Provide the reason and click **Delete**.

Once the event is deleted, the event gets a **DELETED** stamp, the event name appears in strikethrough, and the content of the event is displayed in grey. By default, all deleted events are still visible in the schedule. You can select to show or hide the deleted events by selecting or clearing the **Include deleted events** checkbox in the **Show all events** drop-down list:

Search D Unscheduled					Show all events  Show all events Show all initiated events
24 Nov 2021 DELETED					Include deleted events
					Protocol date not set
Event date	DM V	CRA	SDV V		Scheduled date not set
Physical Examination					Event date 24 Nov 2021
Vital Signs					
12-Lead ECG					
ExtraForm					

## 5 Resetting the event status

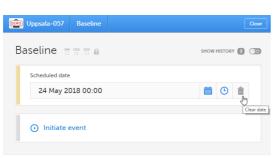
If you have initiated or planned a <u>scheduled</u> event by mistake, you can set it back to its previous status. If any data is entered on the event, the forms with data need to be reset before the event status can be reset.

Note! If a scheduled event with visibility conditions is reset and the conditions were not fulfilled, the event status is set as "Deleted".

To reset the event status for a scheduled event that was initiated/planned:

1

- 1 Open the event and click **Event date**. The Event date form opens.
- 2 Click the trash can icon next to the date.



#### 3 The date is now **not set**.

Click Give re	eason.	
Depsala-53	Baseline	Save changes Close
Baseline	M CRA SOV	SHOW HISTORY 🚺 🔘
Scheduled dat	e	
Scheduled 24	I May 201	Give reason
🕒 Plan ev	vent 🕞 Initiate even	t

4 Provide the reason and click **Ready**:

PlannedDate	
Choose reason for changed value	
O Query resolution	
Other reason (describe below)	
Ready	Cancel

## 6 Deleting a subject

Note! A subject cannot be deleted if the form that was used to add the subject is locked.

To remove a subject from the study:



On the Details page, click the form that was used to add the subject.



2 Click Delete subject.



A confirmation dialog appears.

#### 3 Click Continue.

Confirm "Delete"			Close
Ê	Are you sure you war this subject? This act Continue		

You will be prompted to enter the reason for deletion.

4 Provide a reason, enter your password and click **Delete**.

Delete subject	
Choose reason for deleting subject Transcription error	
<ul> <li>Query resolution</li> </ul>	
Other reason (describe below)	
Confirm with your password	
Delete	Cancel

After deletion, the Details page is marked in grey, but all forms are still accessible.

Details		
SE-Uppsala-011	Show all visits  Visit 1 Sep 2017	
100% 1/1 of study visits	1/1 forms	Visit 1 Ready
Subject deleted! Transcription error By (18 May 2018 16:01 CEST)		Visit date Treatment
Add Patient	Dày cây sôn 🖪 🔨	Treatment

The subject card is also still visible on the <u>Selection page</u>. You can select to remove the subject card from the Selection page by clearing the **Include deleted subjects** checkbox in the drop-down list of the site in the top right corner of the Selection page.

Le Selection						د	<b>k</b> +
Search		17 CARDS 0 ISSUES			Uppsala	A Sort by added date	۲
SE-Uppsala-017	0	SE-Uppsala-156	0	SE-Uppsala-1	Uppsala	ed subjects UPPSALA	
SE-Uppsala-153	0	SE-Uppsala-152	0	SE-Uppsala-C UPPsaLa		SE-Uppsala-010	



Signing data

# Signing data

Published by Viedoc System 2023-10-10

<u>1. Introduction</u> <u>1.1 Signature definition</u> <u>2. Signing console</u>

1 Introduction

Data is signed by the Investigator. Signing for a subject can be done on an individual form, event, or across a study through the signing console.

### 1.1 Signature definition

The Study Manager should, in cooperation with the Site Manager(s), ensure that all users of Viedoc are informed, and certify that all electronic signatures created in the system are intended to be the legally binding equivalent of a traditional handwritten signature.

In Viedoc, the purpose/meaning of a signature is always "responsibility" as used in Sec. 11.50 of Food and Drug Administration (FDA) 21 Code of Federal Regulations (CFR) part 11. The signer is thereby acknowledging his/her responsibility for the entered data. Viedoc keeps account of what was signed, who signed it, and when the signature was performed.

# 2 Signing console

To access the signing console, go to the Details page and click the SIGN icon in the top right corner of the page:

Letails			
SE-111-001	Search	م	Show all event
	Visit 1 Screening	UNS2	
	10 May 2021	16 Sep 2021	

The signing console opens:

SE-STO-001 Signing console	Cancel		
Show only unsigned forms	Show review status		
5 unsigned forms in 3 events.	Sign all?		
Add subject	1 unsigned forms. Sign all?		
▶ Screening	7 unsigned forms. Sign all?		
Diary : Day 6	2 unsigned forms. Sign all?		
Event date: 10 May 2021	DM CRA SDV 🔒 🛃 👁 🔅		
SF36 Questionnaires	DM CRA SDV 🔒 🗹 👁 💸		

The signing console provides a list of all the *initiated forms with no issues* for the selected subject, grouped by event.

You can use the filter in the top of the page to:

- Show all forms
- Show only unsigned forms

The eye icons help you identify which forms you have visited (the most recent version of the form), the green eye icon means that you have visited the last version of the form, the grey eye icon means that you have not visited the latest version of the form.

To review a form, simply click the form bar. After closing the form, you will end up in the signing console again.

To view the review status of:

- CRA reviewed by Clinical Research Associate (CRA) or other role with review permission
- DM reviewed by Data Manager (DM) or other role with review permission
- SDV performed Source Data Verification (SDV)

...for each form, check the Show review status checkbox in the top right corner of the page.

To sign the data:

1

2

Mark the form(s) to be signed in one of the following ways:

• To sign one form at a time, click the sign icon to the right of the respective form:

SE-STO-001 Signing console	Cancel	SE-STO-001 Signing console	Ready Cancel
Show only unsigned forms	Show review status	Show only unsigned forms	Show review statu
10 unsigned forms in 3 events.	Sign all?	9 unsigned forms in 3 events.	Sign all
Add subject	1 unsigned forms. Sign all?	Add subject	1 unsigned forms. Sign al
Screening	7 unsigned forms. Sign all?	>> Screening	7 unsigned forms. Sign al
Diary : Day 6	2 unsigned forms. Sign all?	💌 Diary : Day 6	1 unsigned forms. Sign al
Event date: 10 May 2021	🗹 👁 🏹	Event date: 10 May 2021	<b>Z</b> . 👁 📀
SF36 Questionnaires		SF36 Questionnaires	

• To sign all unsigned forms within an event, click the **Sign all?** link to the right of the respective event:

SE-STO-001 Signing console	Cancel	SE-STO-001 Signing console	Ready Cancel
Show only unsigned forms	Show review status	Show only unsigned forms	Show review status
10 unsigned forms in 3 events.	Sign all?	8 unsigned forms in 3 events.	Sign all?
<ul> <li>Add subject</li> </ul>	1 unsigned forms. Sign all?	> Add subject	1 unsigned forms. Sign all?
Screening	7 unsigned forms. Sign all?	▶ Screening	7 unsigned forms. Sign all?
💌 Diary : Day 6	2 unsigned forms Sign all?	💌 Diary : Day 6	0 unsigned forms. Sign all?
Event date: 10 May 2021		Event date: 10 May 2021	🖸 💿 🔽
SF36 Questionnaires	2 👁 😒	SF36 Questionnaires	2 👁 🔮

• To sign all unsigned forms for the respective subject, click the **Sign all?** link in the top of the page:

SE-STO-001 Signing console	Cancel	SE-STO-001 Signing console	Ready Cancel
Show only unsigned forms	Show review status	Show only unsigned forms	Show review status
10 unsigned forms in 3 events.	Sign all?	0 unsigned forms in 3 events.	Sign all?
Add subject	1 unsigned forms. Sign all?	Add subject	0 unsigned forms. Sign all?
▶ Screening	7 unsigned forms. Sign all?	▶ Screening	0 unsigned forms. Sign all?
Diary : Day 6	2 unsigned forms. Sign all?	Diary : Day 6	0 unsigned forms. Sign all?

Click **Ready** on the top bar of the page. A confirmation dialog is displayed:

DEMO SE-STO-001		Car
forms is	g my password below I confirm that all in accordance with applicable regulati ing documentation. rd	
		Confirm

The text explains the default meaning of the

signature in Viedoc when the Investigator signs data. It is a generic text meant to cover all the regulations under which any study is conducted. The regulations are different according to the study, and it is the responsibility of the Study Manager/Study Coordinator (or any responsible for the study site) to inform the Investigator about the regulations.

3 Type in your password and click Confirm.

Important! If you enter an incorrect password 3 times in a row, your account will be locked.

See also the video tutorial Sign data.

**چ** 

Working with reference data

# Working with reference data

Published by Viedoc System 2021-11-24

1. Introduction
<u>1.1 About reference data</u>
<u>1.2 Terminology</u>
<u>1.3 Workflow</u>
2. Reference data overview
2.4 Overview of reference data on the landing page
2.5 The reference data editor
2.5.1 How to use the reference data editor
2.5.2 Variables
2.5.3 Factors
2.6 How the reference data feature works within the forms
3. Entering and publishing reference data values
4. Editing reference data values

# 1 Introduction

### 1.1 About reference data

Viedoc offers support for adding centralized reference data to the study, which will be automatically populated to the subject forms. When centralized reference data are added to the study, it is not necessary to fill in the reference values for each subject in each form separately.

It is possible to configure different sets of reference data that will be populated to the form based on:

- Factors that can affect the reference data, such as age or gender
- Reference data source, such as a lab
- Site
- Date of measurement

## 1.2 Terminology

Term	Definition
Reference data source	A source that provides reference data (for example a lab).
Reference data scope	A set of measurements that a reference data source carries out, and the parameters that might affect these data. The data in one reference data scope are going to be populated to one lab data form. One or more reference data scopes can be configured in Viedoc Designer > Global Settings, as set(s) of variables and factors (see definitions below).
Factor	A parameter that affects the reference data, for example a subject's gender. Factors may affect the normal range for a test result.
Variable	A specific measurement to be carried out.
Target type	Item of a certain type of information that a reference data source can provide (such as range, unit, low/high values) for a specific measurement (defined by a variable). Any number of target types can be defined by the user.

### 1.3 Workflow

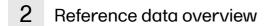
Reference data sources are configured in Viedoc Admin. Each reference data source is linked to one or more reference data scopes that define the following:

- Which measurements the reference data source carries out
- Which factors might affect the results
- What ranges/units are used

For each reference data source-scope combination, the reference values that should be auto-populated to the forms should be entered in the reference data editor in Viedoc Clinic. This can be done by clinic users that have permission to edit and save reference data.

To make the reference values available for auto-population to the subject forms, the reference values should be published. This can be done by clinic users that have permission to publish the reference data values.

See also the video tutorial demonstrating how to work with reference data in Enter reference data.



### 2.1 Overview of reference data on the landing page

Notel You only have access to reference data on the landing page, and to the reference data editor, if you have a role with permission to view, edit and/or publish reference data.

/iedoc's demostudy	Launch
ionfirmatory validation of oral macimorelin as a growth hormone (GH) stimulation test (ST) f f adult growth hormone deficiency (AGHD) in comparison with the insulin tolerance test (IT	for the diagnosis
3 ≥ ± ±	ē 0
Reference data	
All sites Sweden Finland United Kingdom Germany	
Central Lab, Lab references	
2 Reference values Published Jun 19 2018 12:12 UTC by 4 5 i Linked to 6 Stre(s). Linked to 0 form(s). Settings can be edited by 1 user(s). Last saved Jun 19 2018 12 i Linked to 6 Stre(s). Linked to 0 form(s). Settings can be edited by 1 user(s). Last saved Jun 19 2018 12 i Linked to 6 Stre(s). Linked to 0 form(s).	2-12 LITC by
Open reference data editor	
🖽 Local Lab, Lab references	
Reference values Published Jun 19 2018 12:16 UTC by	
i Linked to 1 site(s). Linked to 1 form(s). Settings can be edited by 1 user(s). Last saved Jun 26 2018 05	9:12 UTC by
Latest saved version is not published!	
Open reference data editor	

On the landing page, you can view or do the following:

1. Click the **Reference data** icon to display all the reference data source-scope combinations that are linked to the sites you have access to.

For each reference data source-scope combination, the following information is provided:

2. Status indicator that indicates whether **reference values** have been entered (green) or whether the fields are still empty (grey).

**3**. Status indicator that indicates whether the reference values have been **Published** (including date, time and user who published them) or whether the reference values are **Not published** yet.

4. The number of sites that the reference data source is linked to. This gives an indication of how many sites are impacted in case the reference values are edited.

5. The number of forms that the reference values have been populated to. This gives an indication of how many forms are impacted in case the reference values are edited.

- 6. The number of users that have permission to edit the reference values.
- 7. Name of the user who performed the last changes to the reference values, including date and time.
- 8. Warning message if the latest saved version was not published.
- 9. Click Open reference data editor to view or edit the reference data, see The reference data editor.

### 2.2 The reference data editor

#### 2.2.1 How to use the reference data editor

When you click **Open reference data editor** on the reference data section of the landing page, the reference data editor opens for that specific reference data source-scope combination. Depending on the user rights that are connected to your role, you can view as read-only, edit and/or publish the reference data.

2	3							- 4	-	-5	C
#1 Valid from 2018-06-05 🕤 Valid to On	igoing 💽							🕂 Add ne	w   I	Duplicate	
eference variable name 7	Factors 8						Values to be	populated	9		
-	Sex		Age			(7)	Unit	Normal rar	nge		
emoglobin 🕞	Male		N/A			۲	g/dL	11.9	-	17.3	
	Female	۷	N/A			۷	g/dL	12.1	-	15.3	
ematocrit 🔍	Male			2	18		%	39.1	-	50.2	
				<	18	٣	%	34.8	-	43.9	
	Female			2	18		%	35.1	-	45.1	
				<	18	•	%	33.4	-	41.3	
atelets 💌	N/A	۲		8	18		billion/L	150	-	450	
				<	18		billion/L	165	-	335	

On the reference data editor, you can view or do the following:

1. Click the arrow to expand the reference data table for that specific time period. The newest time period is expanded by default and shown on the top of the list.

2. The number of the reference data set for a given time period. This number is given by default, based on the order in which the reference data sets have been created.

3. The period the reference data set is valid.

- Valid from (1) the beginning of the time period. By default this is set to the current date. To change this, click the arrow to the right of the date and select the date.
- Valid to (2) the end of the time period. By default this is set to "ongoing". To change this, click the arrow to the right of the date and select the date.

4. Click Add new to create a new reference data set for a new time period.

5. Click **Duplicate** to create a new reference data set for a new time period based on a previously created set.

6. Click the trash can icon to remove an existing reference data set time period.

7. **Reference variable name** - the variable that are defined for that reference data scope. A variable is a specific measurement to be carried out. See <u>Variables</u> for more information.

8. Factors - the factors that are defined in the scope. Factors are parameters that affect the reference data. See Factors for more information.

9. Values to be populated - the reference data values provided by the reference data source. The values entered here will automatically be populated to the subject forms.

10. Click **Cancel** to discard all the changes performed and revert to the latest published reference data.

11. Click **Save** to save the changes performed.

Note! Only users with clinic roles that have permission to edit reference data can edit and save the reference data.

Upon save, the reference data set becomes available for publishing.

12. Click **Publish** to publish the reference data. A dialog appears asking you to enter a message. This message appears in the **Messages** section on the landing page.

Publishing makes the data available for auto-population into the subject forms.

Notel Only users with clinic roles that have permission to publish reference data can publish the reference data.

	d to 1 site(s). Settings can be edited by 1 user(s).						) Publish			
	#1 Valid from 2014-01-01 💿 Valid to	Ong	going 💽				(+) Add ne	w	Duplicate	
ere	nce variable name		Factors			Values to	be populated			
			Sex 💌	Age	۲	Unit	Normal rai	nge		
noç	globin	•	Male 💿	N/A		g/L	133		170	
			Female	N/A		g/L	127	-	155	
nat	ocrit	٣	Male 💿	8	18		0.31	-	0.39	
		0 10	under the message section Updated the <u>hematocrit</u> n male -18 from 0.37-0.48 according to reference lat from <u>Karolinska</u> ]June 26.	ormal range fo o 0.39-0.50 data received	Cancel					
Γ.	6 💌 🗄 🗰 🕮							4	5	2
	Messages All sites Sweden Finland United Kingdo A Achanged set of Reference data has been published. The changes will impact forms that are alread.	om	Technical Writer							
	All sites Sweden Finland United Kingdo • Achanged set of Reference data has been published. The changes will impact forms that are alread Iess than a minute ago by Technical Writer • A changed set of Reference data has been published. The changes will impact forms that are alread Zdays ago by Technical Writer	om	A changed set of Referen already populated with Re	ce data has bee eference data a	nd these change					
	All sites Sweden Finland United Kingdd Achanged set of Reference data has been published. The changes will impact forms that are alread less than a minute ago by Technical Writer Achanged set of Reference data has been published. The changes will impact forms that are alread.	om	Technical Writer Jess than a minute ag	ce data has bee eference data a s can be found formal range fo	below: r male >18 from	es are pending	g your review and	d appi	roval.	
	All sites Sweden Finland United Kingdo A changed set of Reference data has been published. The changes will impact forms that are alread less than a minute ago by Technical Writer A changed set of Reference data has been published. The changes will impact forms that are alread Z days ago by Technical Writer A changed set of Reference data has been published. The changes will impact forms that are alread	om	Technical Writer less than a minute ag A changed set of Referen- already populated with Re A fimmary of the change Updated the hematocrit r	te data has bee ference data a s can be found ormal range fo d from Karolin t are affected b	nd these change below: r male >18 from ska, June 26, 20 ry the change ar	0.37-0.48 to 18. e marked as h	g your review and 0.39-0.50 accor naving an issue. A	d appr ding t	oval.	

#### 2.2.2 Variables

The column **Reference variable name** displays the variables that were configured for the reference data scope. By clicking the arrow to the right of the variable name, you can:

- **Reset** the existing reference values for that variable in the *Values to be populated*. This action is only available for a variable that is included in the reference data list, such as 1 and 2 in the image.
- Select Not available to exclude the variable from the reference data. The variable then appears as Not included. This action is only available for a variable that is included in the reference data list, such as 1 and 2 in the image.

When the variable is not included, such as 3 in the image, you can:

- Select Include to add the variable to the reference data set again.

Reference variable nar	ne	Factors					Values to	be populated			
		Sex	٣	Age		٣	Unit	Normal rar	nge		
Hemoglobin	R	Male	(*)	N/A			g/dL	10.9	-	17	
-	Reset	Female		N/A			g/dL	12	-	16.7	
Hematocrit 🔶	Not available	Male		N	18		%	39	-	65.4	
-				<	18		%	34.8	-	43.9	
		Female		N	18		%	32.5	-	39.1	
				<	18		%	33.4	-	41.3	

**Notel** If you do not want automatic population of reference data for a certain variable, the variable should be set to *Not included.* This way, it is possible to manually add reference data for that variable to a form.

#### 2.2.3 Factors

The column Factors displays the factors that were configured for the reference data scope. In this column, you can:

1. Click the arrow to the right of **Factors**, and select a factor from the drop-down list to add that factor to the table. If no arrow is displayed, all factors predefined in the reference data scope are already added (as in the image).

2. Click the arrow to the right of the factor label and click **Remove** to remove that factor from the table.

By default, a newly added factor is populated with N/A (not applicable) in the table. You can edit this by clicking the arrow to the right of N/A and select one of the options from the drop-down list. The drop-down list displayed varies depending on whether the factor has predefined factor options or not.

3. For a factor that has predefined options, such as Sex in the example:

- A: Select one of the options in the list to set the current row to that option, or
- B: Select one of the options with a + in front of it to add a new row to the column populated with the selected option, or
- Select Delete row to remove the current row from the table

4. For a numeric range (no predefined options), such as Age in the example:

- Select one of the options that define the range: inclusive in between, less than, less than or equal to, greater than, greater than or equal to, equal, and fill in the number(s); or,
- Select N/A (not applicable), or
- Select Add new row to add a new row to the table, or
- Select Delete row to delete the row from the table

Reference Data / Central Lab, Lab references	Factor labels     Same     Cancel       64:05 ©     Valid to 2018-06-29 ©	vse X								
Einked to 6 site(s). Settings can be edited by 1 user(s).						Publish	I Sav	e	Canc	el
#1         Valid from         2018-06-05         •         Valid to         2018-06-29         •							🕀 Add ne	w   C	Juplicate	
Reference variable name	Factors				1	Values to b	e populated			
	Sex	2 🥷	Age			Unit	Normal rai	nge		
Hemoglobin	Male	Remove	N/A			g/dL	12.9		17.3	۲
	Female	۷	N/A		۲	g/dL	12.1		15.3	۲
Hematocrit Eactor options	Male	۲		8	18 🐨	%	39.1	Ξ	50.2	٣
				<	18 💿	%	34.8		43.9	۲
	Female	٣		8	18 💿	%	35.1		45.1	۲
				<	18 💿	%	33.4		41.3	۲
Platelets	N/A	3 🥷		8	18 4 9	billion/L	150		450	۲
3A: edit the curre	ant row	Male	- Inc	lusive i	nbetween	billion/L	165		335	
		Female	<ul> <li>Les</li> </ul>	ss than						
#2 Valid from 2014-01-01 Valid to 2018-06-04		🕀 Male	😫 Le	ss than	or equal to					
		🕢 Female	> Gr	eater th	an					
3B: add a new ro	w	Delete row	≥ Gr	eater th	an or equal to					
			(=) Eq	ual						
			N/A							
-			(+) Ad	ld new i	ow					
-				lete row						

**Notel** If you would like to add the factor option N/A to a factor that also has other options, the option N/A should be the last entry for that variable in the table. The reason for this is that, while populating a form with reference data, the system is matching the factor options starting from the top of the table. If a match is found, the corresponding data

are populated to the form. The option N/A is always a match. So if N/A is listed at the top of the table, the search will stop and the form will be populated with the data corresponding to N/A. If you want the system to match the other factor options first, these should be listed <u>before</u> N/A in the table.

### 2.3 How the reference data feature works within the forms

When the reference data are published, they become available for auto population to the forms they are intended to be used in.

To populate a form with reference data, the Investigator/Study Nurse/site staff selects:

For each scope in the form, the reference data source that provided the results, from the drop-down list
The date and time of collection

It is also possible that the event date is used instead of date and time of collection. In that case, the reference data populate after the source is selected.

KI-04 👗	Visit1 [Au	g 06 2018j 🔹				Save changes	Close	
.aborat	ory Re	sults - B	000	test				
Link the scop		ference data so	irce that	t provided the test results Central Lab	×			
	ne of collection	on 🛗 🕓					÷	
							6	
Hemoglobin Result		Unit g/dL		Normal range	Clinical signifcance NCS CS		( <del>+</del> )	
Hematocrit Result		Unit %		Normal range       v     35     45	Clinical signifcance NCS CS		(+)	
Platelets Result		Unit		Normal range	Clinical signifcance	variable / reference here. The	in the Refer Platelets wa e values are ese fields ar an be entere	s set to <i>Not</i> automatica e editable s
					0	_	_	

Tip! If you do not want any reference data to be populated automatically, do not select a reference data source, but leave the drop-down list to *Select a source*. No automatic population of data will take place and you can fill in the fields manually.

Note! No reference data can be populated, if...

- The items used as factors are left empty for a specific subject.
- The selected Date and time of collection does not fall within the time frame the reference value set is valid.

## 3 Entering and publishing reference data values

Note! You can only enter reference values when your role has permission to edit reference data.

To enter a new set of reference values:

1 On the Viedoc landing page, click the **Reference data** icon.

2 Click **Open reference data editor** for the reference data source-scope combination you would like to enter values into.

Viedoc's demostudy Confirmatory validation of oral macimorelin as a growth hormone (GH) stimulation test (ST) for the diagnosis of adult growth hormone deficiency (AGHD) in comparison with the insulin tolerance test (ITT).	Launch
3 🛛 🖻 🗰 🧱	ē 0
Reference data	
All sites Sweden Finland United Kingdom Germany	
IIII Central Lab, Lab references	
Reference values Published Aug 06 2018 11:28 UTC by Technical Writer	
i Linked to 6 site(s). Linked to 0 form(s). Settings can be edited by 1 user(s). Last saved Aug 06 2018 11:28 UTC by Technical Writer	
Open reference data editor	
🔛 Local Lab, Lab references	
S Reference values S Published Jun 26 2018 12:42 UTC by Technical Writer	

The reference data editor opens and displays the variables and the target types to be populated, as defined in the reference data scope. If you would like to exclude some of the variables, click the arrow to the right of the variable name and select **Not available**. See also <u>Variables</u> for more information.

3 Select the date from which, and to which, this set of reference values is valid in the Valid to and Valid from fields.

Reference Data / R	egional Lab, Lab ref	ferences							Close	$\times$
Einked to <b>6</b> site(s). Sett						Publish	Sa	re	Cancel	
Valid from	2018-08-06 <b>R</b>	Valid to	Ongoing	$\odot$			🕀 Add n	ew   D	uplicate	
Reference variable name	Today				Factors	Values to be	populated			
	Pick a date					Unit	Normal ra	nge		
Hemoglobin	Clear			۲				-		۲
Hematocrit				۲				-		۲
Platelets				(V)				-		۲

4 Click the arrow to the right of **Factors** and select the factors that should be included.

Reference Data / Regional Lab, Lab references				Clo	se X
Example 2 Interesting the second seco			Publish .	. Save Canc	el
Valid from 2018-08-06 • Valid to Ongoing •	Factors	0	Velue te he	Add new   Duplicate	
Reference variable name	Factors	(+) Sex 🖓	Values to be		
		- 0	Unit	Normal range	
Hemoglobin		🕂 Age		-	۳
Hematocrit					۲
Platelets				•	۲

For every variable, and for every factor, click the arrow to the right of *N/A* and select the factor options that should be included.

If the factor is a numeric range, select Set a value. By default, the inclusive in between option appears.

Reference Data / Regional Lab, Lab references							Close >
🔢 Regional Lab, Lab references				Pub	lish Sav	e C	ancel
Linked to ${\bf 6}$ site(s). Settings can be edited by ${\bf 1}$ user(s).							
Valid from 2018-08-06      Valid to Ongoing	• Factors			Values tr	Add ne	w   Duplie	cate 🛛 💼
	Factors     Sex      v	Age		Values to	Add ne     be populated     Normal rar		cate   🗑
Reference variable name	Factors	-			o be populated		cate   💼
Reference variable name	Factors Sex 💌	-	-	🕑 Unit	o be populated	nge	

If you would like to change the type of the range, click the arrow again and select the type of range you would like to include. If necessary, click **Add new row** to add rows. Manually enter the values of the range in the blue fields.

Reference Data / Regional Lab. Lab references												Close	)
Regional Lab, Lab references Linked to 6 site(s). Settings can be edited by 1 user(s).									Publis	sh Sa	/e	Cancel	
#1         Valid from         2018-08-06         •         Valid to         Ongoing	⊙									📀 Add n	ew   Du	plicate	â
Reference variable name	Factors								Values to	be populated			
	Sex		Ag	e				•	Unit	Normal ra	nge		
Hemoglobin 🌚	N/A	۲		0	-	1	18	•			-		
					8	1	19	0			•		
Hematocrit 🌚	N/A	۲		- Inc	usive i	inb	etween				•		
Platelets 🕑	N/A	٣		< Les	s than						-		
				≤ Les	s than	or	equal to						
				> Gre	ater th	han							
				≥ Gre	ater th	han	or equal to	C					
				= Equ	al								
				N/A									
				+ Ade	l new	ro	w Jh	)					
				Del	te rov	N	<sup>0</sup>						

See also Factors for more information.

- 6 For every variable, and for every factor, enter the reference values that should be automatically populated to the forms.
- 7 Click **Save** to save the reference data.

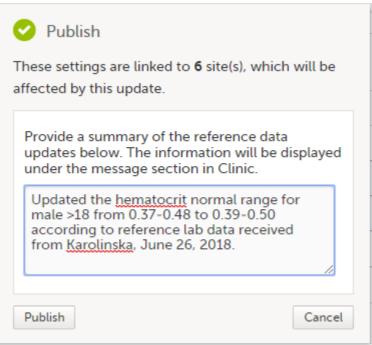
#### To publish reference data:

Notel You can only publish reference data when your role has permission to publish reference data.

#### 1 Click Publish.

Reference Data / Regional Lab, Lab references									Clos	e X
Regional Lab, Lab references Linked to 6 site(s). Settings can be edited by 1 user(s).						Publish	Sav	e	Cance	ł
#1 Valid from 2018-08-06  Valid to Ongoing	۲						🕀 Add ne	w   t	Duplicate	â
Reference variable name	Factors					Values to be	populated			
	Sex	٣	Age			Unit	Normal rai	nge		
Hemoglobin 🔄	N/A		0	-	18 💿	g/dL	12.5	-	18	
				8	19 💿	g/dL	13.7	=	14.6	V
Hematocrit	Not included									
Platelets 💿	Not included									

A dialog opens.



#### Click Publish.

The reference values are published and available for auto-population to the forms.

If the reference data scope is changed and published in Viedoc Designer <u>after</u> the reference values have been published in Viedoc Clinic, the following message will appear on the Reference data page.

Reference	data							
All sites Sweden	Finland	Germany	Netherlands	Austria	Belgium	Italy	United Kingdom	Switzerland
📰 Akademisł	ka Lab, ⊦	lematolo	gy CBC					
📀 Reference valu	ies 🕑 Pu	blished <b>13 Au</b>	g 2018 07:56 UT	<b>C</b> by	tai ti ta			
i Linked to 2 site(s).	Linked to 20	form(s). Setting	s can be edited by 3	user(s). Last	saved 07 Aug	2018 12:	18 UTC by	
Publish required as	scope defini	ion has been u	pdated					
Open reference data ed	litor							

The reference date source-scope combination needs to be updated and <u>published again</u> in Viedoc Clinic, for the reference values to become available for auto-population to the subject forms.

If the reference values change for already populated data, the affected forms will be marked with a red issue icon [i].

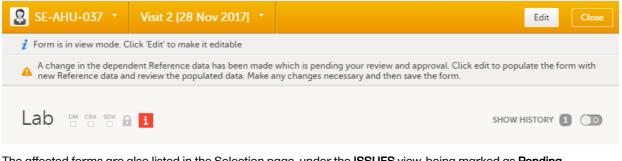


Note! You can only edit data when your role has permission to edit reference data.

To edit a set of reference values:

- 1 On the Viedoc landing page, click the **Reference data** icon.
- 2 Click **Open reference data editor** for the reference data source-reference data scope combination you would like to enter values into.
- 3 Edit the variables (see <u>Variables</u>), factors (see <u>Factors</u>), or the reference values.
- 4 Click Save to save the reference data.

If the reference values change for already populated data, the affected forms will be marked with a red issue icon [i], and a message is displayed on the top of the form as illustrated below:



The affected forms are also listed in the Selection page, under the **ISSUES** view, being marked as **Pending Reference data upgrade**. For more details, see <u>Selection page</u>.



#### Randomization, allocation and emergency unblinding

# Randomization, allocation, and emergency unblinding

Published by Viedoc System 2023-06-21

 1. Introduction

 2. Randomization

 2.1 Emergency unblinding

 3. Allocation

 3.2 Undo allocation

 3.3 Replace allocation

 3.4 Allocation actions in audit trail

## 1 Introduction

If randomization and allocation are used in your study, some specific forms are used for randomization and allocation, that have a specific behaviour compared to the other forms. This lesson describes the particularities of the randomization and allocation forms and how to work with these.

## 2 Randomization

It is important to know that the randomization form will be locked after the randomization was performed, so the form won't be possible to edit.

An example of a simple randomization form:

EE-01-002 🔹	Visit 1 [28 Jun 2019] 🐣	Randomize	Close
Randomiza Randomize subject	tion		
Sex 🔵 Male 💿 Fema	ale		(÷)

You can notice that, compared to the other forms, here the **Edit** option is replaced by the **Randomize** (or something else, depending on the configurations in your study).

Note! If the randomization is configured for the study start event, there is no **Randomize** button. Instead, the randomization happens when saving the form.

To randomize the subject, click Randomize. The randomization is performed and the form is locked:

DEMO SE-01-002 -	Visit 1 [28 Jun 2019] ု		Close
🗶 Form is in read-only mode.			
Randomizat Randomize subject	tion 🖿 🖙 🖬 🔽	SHOW HISTORY	
Sex 🔘 Male 💿 Fema	le		(+)

## 2.1 Emergency unblinding

In case of any medical emergency or serious medical condition that occurs while the participant is taking part in a study, the participant may not be able to be treated adequately unless it becomes known which treatment they have been receiving. In such situations, unblinding may become necessary.

Important! Unblinding a subject will reveal the subject's treatment and unblind all personnel with permission to view this data in the study.

If you have permission to perform an emergency unblinding, the **Unblind subject** appears on the randomization form, after the subject was randomized:

EF-01-002 *	Visit 1 [28 Jun 2019] 🔹		Close
🂢 Form is in read-only n	node.		
Randomizat Randomize subject	tion 🖿 🖙 🖬 🗹	SHOW HISTORY	
Sex 🔘 Male 💿 Ferna	ale		(÷
▲ Unblind subject	t	₽ Form Hist	ory

To unblind a subject:

1

#### Click Unblind subject:

DEMO SE-01-003 *	Visit 1 [28 Jun 2019] 🔹	
🏏 Form is in read-only r	node.	
Randomiza Randomize subject	tion 🖞 🗀 sov 🖬 🔽	SHOW HISTORY 1
Sex 🔵 Male 💿 Fem	ale	Ē
M Unblind subject	zt	D Form History

The Unblind subject dialog will be displayed.

2 Type the reason for unblinding and select **Continue**.

\Lambda Unblind subject	
This will reveal the subject's treatme unblind all personnel with permission this data in the study.	
Give reason for the action	
	li
Continue	Cancel

#### 3 Enter your password and select Confirm.

This will reveal the subject's treat unblind all personnel with permi- this data in the study.	
Give reason for the action	
Emergency <u>unblinding</u> needed	11
Give your password and confirm clicking 'Confirm'.	the action by
Password	
Confirm	Cance

The treatment is now visible in the randomization form for the unblinded subject, for all the roles with permission to view the data:

DEMO SE-01-003 *	Visit 1 [28 Jun 2019] 🔹		
🌠 Form is in read-only n	node.		
Randomiza Randomize subject	tion 🖿 😁 🖬 🔽	SHOW HISTORY 💈	
Sex Male • Fema Treatment Active • Place			(+)

# 3 Allocation

If configured for your study, allocation can be performed additionally to the randomization. This can be performed within the same form as the randomization or in a separate allocation form.

It is important to know that the allocation form will be locked after the allocation is performed, so the form won't be possible to edit. Still, the following actions can be performed after the allocation:

- <u>Undo allocation</u> if the allocation was performed by mistake, for example at the wrong time. This will
  remove the existing allocation by reverting the allocation to its previous state and making the previously
  allocated kit available for other subjects.
- <u>Replace allocation</u> allocate a new kit, for example if the subject loosed the previous one. This will replace the existing allocated kit with a new one. The previously allocated kit will continue to be allocated to the same subject.

An example of an allocation form:

EE-01-002 *	Visit 1 [28 Jun 2019] 🔹	Allocate	Close
Allocate a k	kit		
Click Allocate to all	ocate a kit for the patient for thi	is visit	(÷

To perform the allocation for the first time to a subject, click **Allocate** (or something else, depending on the configurations in your study). The allocation is performed and the form is locked:

SE-01-002 🔭	Visit 1 [28 Jun 2019] 🔹	Modify	
🌠 Form is in read-only r	node.		
Allocate a k	it 🗠 😁 🖬 🔽	SHOW HISTORY 1	D
Click Allocate to all	ocate a kit for the patient for this	visit	÷
The following kit has Kit number Exp 1001 • Storage conditions Refrigerator, 2 to 8	oiry date 01 Jan 2020 🗯	៤	/+

The action is registered in the audit trailed as **Initial data entry** and a new version of the form PDF is generated (see <u>Allocation actions in audit trail</u>).

Notel To perform an allocation after the existing allocation was undone, see <u>Undo allocation</u>.



Undo allocation

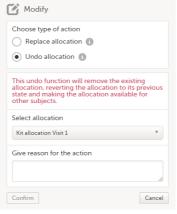
To undo an existing allocation:

1 Open the allocation form and click **Modify**. A dialog is displayed:

Modify	
Choose type of action Choose type of action Choose type of action Outloation	
Confirm	Cancel

#### 2 Select Undo allocation.

3 If multiple allocations are performed within the same form, select from the dropdown list the allocation you want to undo under **Select allocation**:



Type the reason for undoing the allocation (this text will be shown in the audit trail afterwards, see <u>Allocation actions in audit trail</u>) and select **Confirm**:

Ľ	Modify		
	Choose type of action		
(	Replace allocation 🚯		
(	Undo allocation 🚯		
	his undo function will remove the existing llocation, reverting the allocation to its previous tate and making the allocation available for ther subjects.		
1	elect allocation		
	Kit allocation Visit 1		
	live reason for the action		
	Allocation should not have been performed		
4	Confirm Cancel		
Th	e allocation is undone and a n	$\bar{n}$ essage is displayed on the top of the fo	rm:
	SE-01-002 * Visit 1 [28 Jun 2019] *	Modify	
	🗶 Form is in read-only mode.		
	Allocation not complete, use 'Modify' button to allocate	again.	
	Allocate a kit 🛯 🖀 🖥 🖬 🚺	SHOW HISTORY 2	
	Click Allocate to allocate a kit for the patient for	this visit	(÷

This will remove the existing allocation by reverting the allocation to its previous state and making the previously allocated kit available for other subjects.

A new version of the form PDF is generated (see Allocation actions in audit trail).

A new allocation can be performed for the subject, as described below.

To perform a new allocation, for a subject for which a previous allocation was undone:

Select Modify on the allocation form for a subject for which the previous allocation was undone:

Modify	
Choose type of action Allocate	
Confirm	Cancel

4

1

2 Select Allocate. If multiple allocations are performed within the same form, select from the dropdown list the allocation to be performed, enter the reason (this text will be shown in the audit trail afterwards, see <u>Allocation actions in audit trail</u>) and select **Confirm**:



3

#### The allocation is performed and the form is locked:

SE-01-002 🔭	Visit 1 [28 Jun 2019] 🔹	Modify	
🏏 Form is in read-only n	node.		
Allocate a k	it om cra sov a 🔽	SHOW HISTORY	
Click Allocate to all	ocate a kit for the patient for this vis	it	(+)
The following kit ha Kit number Exp 1001 • Storage conditions Refrigerator, 2 to 8	ory date 01 Jan 2020		÷

A new version of the form PDF is generated (see Allocation actions in audit trail).

## 3.2 Replace allocation

To replace an existing allocation with a new one, that is, to assign a new kit to a subject:

#### 1 Open the allocation form and select **Modify**:

SE-01-002 * Visit 1 [28		Modify
💢 Form is in read-only mode.	🕜 Modify	
Allocate a kit	Choose type of action O Replace allocation	SHOW HISTORY 1
Click Allocate to allocate a kit fo	Confirm Cancel	Ð
The following kit has been alloca Kit number Expiry date 1001 * 01 Jan 202 Storage conditions		<u>ب</u>
Refrigerator, 2 to 8 degrees C		

Select **Replace allocation**. If multiple allocations are performed within the same form, select from the dropdown list the allocation to be replaced, enter the reason (this text will be shown in the audit trail afterwards, see <u>Allocation actions in audit trail</u>) and click **Confirm**:

Modify	
Choose type of action	
Replace allocation ()	
Undo allocation 🚯	
The replace function will replace the existing allocation with a new allocation. The previous allocation will remain and will continue to refer to this subject.	
Select allocation	
Kit allocation Visit 1	
Give reason for the action	
Subject lost the kit. New kit needs to be allocated	
Confirm Cancel	
new allocation is performed:	
SE-01-002 * Visit 1 [28 Jun 2019] *	Modify Clos
SE-01-002 × Visit 1 [28 Jun 2019] ×	Modify Clos
	Modify Clos SHOW HISTORY 4
X Form is in read-only mode.	
🗶 Form is in read-only mode. Allocate a kit 😁 😁 🖬 🔽	SHOW HISTORY 4
Form is in read-only mode. Allocate a kit  Allocate a kit for the patient for this visit	SHOW HISTORY 4
Form is in read-only mode.          Allocate a kit       Image: Bit imag	SHOW HISTORY 4
Form is in read-only mode.          Allocate a kit       Image: Click Allocate to allocate a kit for the patient for this visit         Click Allocate to allocate a kit for the patient for this visit         The following kit has been allocated:         Kit number       Expiry date	SHOW HISTORY 4

This will replace the existing allocated kit with a new one. The previously allocated kit will continue to be allocated to the same subject.

A new version of the form PDF is generated (see Allocation actions in audit trail).

### 3.3 Allocation actions in audit trail

2

All the actions performed on allocation are recorded in the audit trail as follows:

- The first time the allocation is performed, it is recorded as Initial data entry:

Allocate a kit 😁 😁 🖬 🔽	SHOW HISTORY 1
Click Allocate to allocate a kit for the patient for this visit	(÷
The following kit has been allocated: Kit number Expiry date 1002	Đ
Initial data entry   Demo User (317) 28 Jun 2019 13:42 CEST         Image: Strange control in the straight of the str	

• The other actions performed (undo allocation, replace allocation) are recorded in the audit trail with the text entered as reason when the action was performed:

Click Allocate to allocate a kit for the patient for this visit	(÷
The following kit has been allocated: Kit number Expiry date 1004 v 04 Jan 2020 integrations Storage conditions Refrigerator, 2 to 8 degrees C	(+
Expiry date             • 02 Jan 202!             Initial data entry   Demo User (317) 28 Jun 2019 13:42 CEST                 Expiry date             02 Jan 202             • 04 Jan 202:             Kit lost by subject. Allocate new kit   Demo User (317) 28 Jun 2019 13:45 CEST                 Kit number             • 1002             Initial data entry   Demo User (317) 28 Jun 2019 13:42 CEST                 Kit number             • 1002             Initial data entry   Demo User (317) 28 Jun 2019 13:45 CEST                 Kit number             1002             • 1004             Kit lost by subject. Allocate new kit   Demo User (317) 28 Jun 2019 13:45 CEST	
Storage cor: FRefrigerator Initial data entry   Demo User (317) 28 Jun 2019 13:42 CEST	

The allocation actions performed within a form are also shown in the Form History:

₽ F	Form History	
FOF Jacks	Version 4 Saved by Demo User (317) 28 Jun 2019 08:51 CEST Replace allocation	
FOF Jacks	Version 3 Saved by Demo User (317) 28 Jun 2019 08:50 CEST Allocation	
FOF Addre	Version 2 Saved by Demo User (317) 28 Jun 2019 08:48 CEST Undo allocation	
	Version 1 Saved by Demo User (317) 28 Jun 2019 08:45 CEST Initial data entry Lock checked by System (0) 28 Jun 2019 08:45 CEST	
	Cl	ose



Issues and tasks

## Issues and tasks

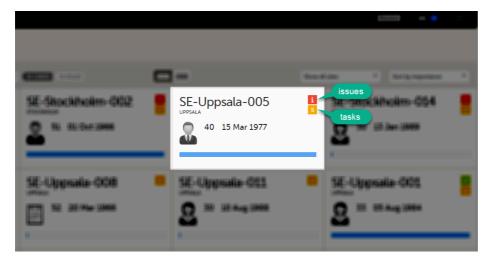
Published by Viedoc System 2024-10-10

1. Introduction 2. Issues 3. Tasks

# 1 Introduction

The <u>Selection page</u> displays all subjects from all sites you have access to. Each subject is represented by a subject card.

In the top right corner of each subject card, orange and red icons are displayed when there are issues (such as queries) and tasks to be solved/completed for that subject. These icons help you identify where actions are needed.

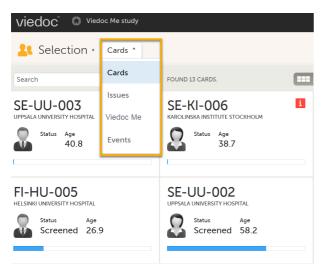


- Red icon: Issues indicating that the subject has open queries and/or unconfirmed missing data. Both
  open queries and unconfirmed missing data should be handled and resolved by the site but, as a
  Monitor or Data Manager, it is important for you to be aware of these issues as well. For more details, see
  <u>Queries overview</u>.
- Orange icon: Task indicating the number of tasks to be completed for this subject, such as approving query answers, perform reviews, and so on.

All issues and tasks should eventually disappear but while being present they help you identify where action is needed.



It is possible to switch between the views showing Cards/Issues/Viedoc Me/Events by selecting the dropdown list next to **Selection**.



The ISSUES view displays the list of existing issues.

Viedoc 🖗 🛛	, i i i i i i i i i i i i i i i i i i i		Demo User M	anitor 🐹 2 🌣
Search	18 CARDS 20 IS	SUES	Show all sites	All issues
ID 41	REFERENCE IT	ISSUE DETAIL 41	CONFIRMATION #1	STATE 41
SE-02-006	Visit 1 Lab	Missing data Demo User 07 Jul 2017 14:56 CEST		Missing data
SE-02-007	Visit 1 Lab Collection Date and Time	<b>! Missing data</b> Demo User 17 Aug 2017 14:26 CEST		Missing data
SE-02-006	Visit 1 Lab Collection Date and Time	<b>?</b> Is the date correct? Please verify! Demo User 01 Oct 2018 09:54 CEST		Awaits answer
SE-02-007	Visit 1 Lab Leukocytes	<b>! Missing data</b> Demo User 17 Aug 2017 14:26 CEST		Missing data
SE-02-007	Visit 1 Lab Leukocytes	Missing data Demo User 17 Aug 2017 14:26 CEST		Missing data

Select any row to open the form where the issue is raised. If you close the form, you will return to this issue list again.

The list of issues can be filtered by using the drop-down lists on the top right side of the page. You can filter the issues:

- By site select to view data from a specific site or from all sites.
- By issue type/status:
  - All issues all the issues regardless of the status, except for pre-queries
  - All open issues (default if role-based queries is <u>not</u> enabled for your study) all the issues with an open status:
    - Missing data
    - Pending form upgrade
    - Pending reference data upgrade
    - Open queries (with status Awaits answer)
  - All queries all queries regardless of the status
  - Open queries only queries with status Awaits answer
  - Queries awaiting approval only queries with status Awaits approval
  - My queries -

Note! The following applies only if role-based queries is <u>not</u> enabled for your study:(default for users with permissions to Add/change queries, Add pre-queries, Promote pre-queries):

- For user with permissions to Add pre-queries all pre-queries that were raised by the user, regardless of the status
- For user with permissions to Promote pre-queries all pre-queries promoted by the user and all pre-queries raised regardless by whom they were raised
- For user with permissions to Add/change queries all queries raised or updated by the user, all queries awaiting approval regardless by whom they were raised, show all pre-queries promoted regardless by whom they were promoted
- Pre-queries all pre-queries regardless of status
- My role's queries -
- Note! <u>When role-based queries is enabled for a study</u>, for user roles with permission to Add/change queries, such as Monitors and Data Managers, this filter is applied by default when opening the **ISSUES** list. My role's queries lists all the open manually raised queries that were raised by the same role with the status Awaits approval <u>or</u> Awaits answer.
- Missing data all unconfirmed missing data

- Form upgrade pending - forms pending upgrade as a result of applying a revision of the study design

# 3 Tasks

As soon as data has been entered, the orange task icon appears, indicating that there is data ready for review, or queries answers to be approved (see <u>Raising/Approving/Rejecting Queries</u>). The number of tasks is displayed. If there are more than nine tasks to be performed on a booklet or form, +9 will be displayed in the icon. Tasks should be handled continuously throughout the study to make sure data at all times is as clean and accurate as possible.

Tasks are tracked on three levels:

- Subject
- Event
- Form

1 Details		## 🖻	< 86/254 ►
SE-20-003 UPPSALA UNIVERSITY HOSPITAL STATUS AGE Withdrawn 70.1	Search O Screening Screening	Show all events *	
0% 1/1 Q/7*		Protocol date not set	0
a tasks pending	Event date	Scheduled date not set	٩
Common events C W H W L V Medical / Surgical History (3) Prior and Concomitant Medications (0)	Check Questions	Event date 30 07 2020	赵

As soon as a task is completed, it will disappear from the views.

Notel If Role based queries is enabled for your study, the task counter includes only the queries raised by the same role, that is, the ones that the active user role can take action on.

**ح** 

Clinical review, SDV, and Lock

# Clinical review, SDV, and Lock

Published by Viedoc System 2023-10-09

 1. Introduction

 2. Clinical review

 3. SDV

 3.1 SDV on item level

 4. Lock

 4.2 Locking a form

 4.3 Unlocking a form

 4.4 Locking/unlocking a subject-submitted (Viedoc Me) form

 5. Data review console

 6. Study status and metrics

1 Introduction

The requirements on data review and Source Data Verification (SDV) vary between studies. This lesson describes what is possible in Viedoc.

In this example, clinical review and SDV are tasks to be completed. The number of tasks to be completed is displayed in the orange task icon:

2 tasks	
Patient Info 💶 🛯 📽 🖬 🔽	SHOW HISTORY 1
💷 Gender 🧳 Male 💿 Female 🔵 Transgender	(÷
SDV Date of Birth 05 Aug 1984 🗰 SDV Age 33	
Clinical review SDV Lock	Sorm History Add note

The orange task icon disappears when the checkboxes for clinical review and SDV are selected and the tasks are completed.

Patient Info 📔	CRA SDY	SHOW HISTORY 1
Gender Date of Birth	Male  Female Transgender O5 Aug 1984	(÷
Clinical review	SDV Lock	D Form History Add note

Notel If a user with edit permission is editing the subject card, you can still perform the clinical review and the SDV. And vice versa, the clinical review and SDV will not lock the subject for users who need to edit it.

## 2 Clinical review

The purpose of clinical review is to give the Monitor the possibility to mark forms as reviewed.

Marking a form as clinical reviewed can be performed in one of the following ways:

- At the bottom of each form, by checking the **Clinical review** checkbox.
- Batch-wise through the review console. Read more about the <u>review console</u> below.

Marking a form as reviewed does not mean that you are on-site having access to source data. It means that you have done a clinical review off-site of the content in the forms, and that you are prepared for your upcoming monitoring visit.

Notel If a form is edited after you have marked it as clinical reviewed, the review status breaks and the form must be reviewed again. The review task appears again in the orange task box icon.



Source data verification is normally the most time-consuming activity for the Clinical Research Associate (<u>CRA</u>), as it requires access to source notes. All forms that require <u>SDV</u> are highlighted with task(s).

SDV can be performed in one of the following ways:

- On item level, by clicking on the SDV flag for the item in the form.
- On form level, by selecting SDV at the bottom of the form.
- Note! If there are items in the form that require SDV and are hidden due to data visibility conditions in the study design, you will not be able to apply SDV on form level.
- Batch-wise through the review console. Read more about the <u>review console</u> below.

Notel If a form is edited after you have marked it as SDV, the SDV status is reset, and the form has to be SDV'ed again. The SDV task appears again in the orange task box icon. However, only the fields that were changed on the form are required to be SDV'ed again. These fields are clearly indicated with the red SDV icon.

### 3.1 SDV on item level

If the study has the setting for item-level SDV enabled, SDV can be performed for individual items in a form.

If the study design specifies that an item requires SDV, there will be an SDV icon next to the item in the form. The red icon indicates that SDV has not been performed. To perform SDV, simply click on the red icon. The icon then turns into a green SDV icon.

🚨 DE-95-093 🔹	Add subject [07 Jul 202	3] -		Close
🏏 Form is in read-only	mode.			
Demograp	hics 😁 💝 🕾 🖬 🗹		SHOW HIS	TORY 2
v 07 Jul 2023	med Consent	Sov Sex		(+)
SDV Date of birth          *       11 Jul 1984		SDV Age 39.0 years		(+)
Asian Black or Afric	ian or Alaska Native an American ian or Other Pacific Islander	<ul> <li>Ethnicity</li> <li>Hispanic or Latino</li> <li>Not Hispanic or Latino</li> </ul>		(+)
Clinical review	SDV Lock		O Form History	🖍 Add note
		doc™ 4.77.8648.13864   2023-09-06T1 2022 - Demo Study   Berlin Hospital	.6:34 CEST	

When all visible items that require SDV have been SDV'ed, the **SDV** checkbox at the bottom of the form will be automatically selected. And vice versa, if you select the **SDV** checkbox at the bottom of the form, all visible items that require SDV will be indicated with a green SDV icon.

#### Notes!

- If the form contains items that require SDV but are not visible to you, you will not be able to change the SDV status for the entire form.
- If an item is edited after the SDV has been performed, the SDV status is reset, and the item has to be SDV'ed again.
- When a study event form is SDV'ed, the event date form is automatically SDV'ed.

# 4 Lock

### 4.1 Locking a form

Locking data in a form can be performed in one of the following ways:

- At the bottom of every form, by selecting Lock.
- Batch-wise using the review console. Read more about the <u>review console</u> below.

Locking a form should only be performed if there are no more expected changes to that form, that is, if the data is clean.

Important! Updates to the electronic Case Report Form (<u>eCRF</u>) <u>are not applied</u> to locked forms. If you are aware of any upcoming changes to the eCRF that potentially affect already saved and locked forms, make sure that these are unlocked before the new design version is published to the site.

If all forms in all events for a subject have been locked, the subject card on the <u>Selection page</u> will be displayed with a lock icon, indicating all data is locked:

		SE-111-001 SITE 1 STATUS COHORT	
SE-111-001 SITE 1 STATUS COHORT		Search Visit 1 Screening 10 May 2021 Contemport 16 Sep 2021 Contemport 16 Sep 2021	
100% 2/2 of study events	6/6 forms	Visit 1 Ready	Show deleted forms (1)
Demographics		Screening	
Common events		Event date	PM CRA SOV 🔒 🜌
Medical / Surgical History (0) Prior and Concomitant Medication	+ ons (0) +	Check Questions	 DM CRA SDY 🔒 🗹

### 4.2 Unlocking a form

Regular clinic forms can be unlocked by clearing the **Lock** checkbox at the bottom of a form. Unlocking a form opens it up for editing by users with edit data permission (for example the Investigator).

SE-AHU-081 🔹 Vi	isit 1 (09 Jan 2019) 👻	Close				
🗶 Form is in read-only mode.						
Vital Signs 🧔	DM 🥵 SV 🔒 🔽	SHOW HISTORY 1				
Were Vital Signs measure	ed? Date and time       •     09 Jan 2019 0	Ē				
Heart rate 65 bpm	Body temperature 37.2 °C	Ð				
Blood pressure Systolic (1) 120 mmHg	Diastolic 🕦 65 mmHg	Ð				
Clinically significant findi	ings should be recorded in the Medical / Surgery history log	Ē				
Clinical review	SDV Lock	rm History 🔀 Add note				

## 4.3 Locking/unlocking a subject-submitted (Viedoc Me) form

Subject-submitted (Viedoc Me) forms that are filled in by the subject are locked by default.

You may have the possibility to unlock a subject-submitted form if this option is activated for your study. In this case, the **Lock** checkbox appears at the bottom of the subject-submitted form. The form can be locked or unlocked by selecting or clearing the checkbox respectively. Unlocking a form opens it up for editing by users with edit data permission (for example the Investigator).

SE-AHU-081 * Home Admin 1 23 Jan 2019 *	Close
🗶 Form is in read-only mode.	
Home administration 👩 🕆 💝 🕾 🖬 🗹 show history 🕻	
Did you take the dose?     How many tablets did you take?          • Yes      No           • Z3 Jan 2019 15:39	(÷
Click on the scale below to indicate how severe your pain is.	(+)
Have you experienced any adverse reactions?	(+)
Have you taken any other medication apart from the study medication?	(+)
Clinical review	note

## 5 Data review console

You can perform clinical review, <u>SDV</u>, and/or lock of the forms batch-wise, by using the data review console. To open the data review console, click the icon in the top right corner of the **Details** page.

Letails			Data review
SE-111-002	Search		Show all events
STATUS COHORT	Visit 1 Screening	Visit 2	
	16 Sep 2021	17 Sep 2021	

The data review console displays an overview of all forms of a subject that require data review, SDV, or lock. It shows which forms have been reviewed, SDV'ed, or locked. The green and grey eye icons help you identifying forms that you have not previously visited: the green eye icon marks the forms that you have already visited, the grey eye icon marks the forms that you have not visited yet.

SE-Stockholm-002	Data Review Console						(	Cancel
Show all forms *							3 for	ns. 🗸
Add Patient							1 forr	ns. 🔽
Patient Info		DM		SDV V	8	<b>~</b>	٩	۰.
<ul> <li>Visit 1</li> </ul>							2 form	ns. 🖓
Event date: 10 May 2021		DM D	CRA	SDV	8	•	۲	۰.
Lab			CRA	SDV		~	٠	۰.

To review and/or lock the forms:

- 1 Select the form(s) to be reviewed in one of the following ways:
  - Select all forms by clicking the *n* forms link on the top of the page:

SE-Stockholm-002	Data Review Console						C	ancel
Show all forms *							3 form	ns. (
<ul> <li>Add Patient</li> </ul>							1 form	ns. 🖓
Patient Info		DM		SDV V	6	<b>•</b>		٢
<ul> <li>Visit 1</li> </ul>							2 form	ns. 🖓
Event date: 10 May 2021		DM	CRA	SDV	8	~	۲	۰
Lab		DM	CRA	SDV	6	<b>~</b>		$\diamond$

Select all forms within an event, by clicking the *n* forms link to the right of the respective event:

SE-Stockholm-002	Data Review Console						C	Cancel
Show all forms *							3 form	ns. 🗸
<ul> <li>Add Patient</li> </ul>							1 forn	ns. 🖓
Patient Info		DM		SDV V	8	<b>~</b>	۲	٠
							<i></i>	
<ul> <li>Visit 1</li> </ul>							2 forn	ns. 🗸
Event date: 10 May 2021		DM		SDV	8	~	۲	0
Lab		DM	CRA	SDV	8	~	٩	0

 Individually, check the review and/or lock icon for each individual form. Step 2 is not applicable in this case.

SE-Stockholm-002	Data Review Console					Ready	C	ancel
Show all forms *							3 form	ns. 🗸
<ul> <li>Add Patient</li> </ul>							1 form	ns. 🗸
Patient Info		DM		SDV V	•	<b>~</b>		٥
Visit 1							2 form	ns. 🗸
Event date: 10 May 2021		DM	CRA	sov ✔_Ih	, <b>A</b>			۰.
Lab		DM	CRA	SDV	6	~		$\diamond$

In the dialog that opens, select Clinical review, SDV, Lock as needed, and click Ready:

All forms, Visit 1	
Verify SDV	م 🛷 0
All forms (2)	
Only visited forms (2)	
Verify CRA	م الله الم
All forms (2)	
Only visited forms (2)	
Lock	م 🕪 0
All forms (2)	
Only visited forms (2)	
Ready	Cancel

The status of the selected forms is updated according to the selected actions.

Show all forms *				3 forn	ns. 🗸
Add Patient				1 form	is. 🖓
Patient Info		SDV V			0
Visit 1				2 form	IS. 🗸
Event date: 10 May 2021		SDV V	8	٢	۲
Lab	DM D	sdv V	۵	۲	٥

If any of the marked forms have not been visited by you before, you will be asked whether you want to continue with the action or not. If you choose to continue, the forms will be marked according to your selections, that is, the system will not prevent you from marking unvisited forms as reviewed, <u>SDV</u>'ed, or locked.

Notel If the study has the setting for item-level SDV enabled, and a form contains items that require SDV but are not visible to you, you will not be able to change the SDV status for the entire form.



2

## Study status and metrics

The current workload can be checked on the Study status or the Metrics pages.



Data review and Lock

## Data review and Lock

Published by Viedoc System 2023-10-09

 1. Introduction

 2. Data review

 3. Lock

 3.1 Locking a form

 3.2 Unlocking a form

 3.3 Locking/unlocking a subject-submitted (Viedoc Me) form

 4. Data review console

 5. Study status and metrics



The requirements on data review and source data verification vary between studies. This lesson describes what is possible in Viedoc.

If applicable for your study, data review is a task to be completed. The number of tasks to be completed is displayed in the orange task icon:

	1 task		
Patient Info		SHOW HISTORY 1	
Gender Date of Birth	Male Female Transgender 22 Feb 1965		(÷
Data review	Lock	D Form History Add no	ote

The orange task icon disappears when the checkboxes for clinical review and Source Data Verification (SDV) are selected and the task is completed.

Patient Info		SHO	W HISTORY 1
Gender Date of Birth	Male Female Transgender 22 Feb 1965		(+)
✓ Data review	Lock	P Form History	Add note

Notel If a user with edit permission is editing the subject card, you can still perform the clinical review and the SDV. And vice versa, the clinical review and the SDV will not lock the subject for users who need to edit it.

## Data review

2

The purpose of data review is to give the Data Manager the possibility to mark forms as reviewed.

Marking a form as data reviewed can be performed in one of the following ways:

- At the bottom of each form, by checking the **Data review** checkbox.
- Batch-wise through the review console. Read more about the <u>review console</u> below.

Notel If a form is edited after you have marked it as data reviewed, the review status breaks and the form must be reviewed again. The review task appears again in the orange task box icon.



### 3.1 Locking a form

Locking data in a form can be performed in one of the following ways:

- At the bottom of every form, by checking the Lock checkbox.
- Batch-wise using the review console. Read more about the review console below.

Locking a form should only be performed if there are no more expected changes to that form; that is, if the data is clean.

Important! Updates to the electronic Case Report Form (<u>eCRF</u>) <u>are not applied</u> to locked forms. If you are aware of any upcoming changes to the eCRF that potentially affect already saved and locked forms, make sure that these are unlocked before the new design version is published to the site.

If all forms in all events for a subject have been locked, the subject card on the <u>Selection page</u> will be displayed with a lock icon, indicating all data is locked:

		SE-111-001 SITE 1 STATUS COHORI T	
SE-111-001 SITE 1 STATUS COHORT		Search Visit 1 Screening 10 May 2021 A Sep 2021 C	
100% 2/2 of study events	6/6 forms	Visit 1 Ready	Show deleted forms (1)
Demographics		Screening	
Common events		Event date	DM CRA SOV 🔒 🗹
Medical / Surgical History (0) Prior and Concomitant Medicat	+ ions (0) +	Check Questions	 DM CRA SOV 🔒 🗹

### 3.2 Unlocking a form

Regular clinic forms can be unlocked by clearing the **Lock** checkbox at the bottom of a form. Unlocking a form opens it up for editing by users with edit data permission (for example the Investigator).

SE-AHU-081 * Visit 1	09 Jan 2019) 🔻	Close
🂢 Form is in read-only mode.		
Vital Signs 🛭 🔗 🖱 🦻	sey 🔒 🔽	SHOW HISTORY 1
Were Vital Signs measured?	Date and time     •   09 Jan 2019 0	(÷)
Heart rate 65 bpm	Body temperature 37.2 °C	(÷)
Blood pressure Systolic 1 120 mmHg	Diastolic 👔 65 mmHg	(+)
Clinically significant findings sh	nould be recorded in the Medical / Surgery history log	(÷
Clinical review		Form History 🔀 Add note

### 3.3 Locking/unlocking a subject-submitted (Viedoc Me) form

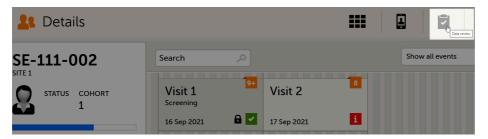
Subject-submitted (Viedoc Me) forms that are filled in by the subject are locked by default.

You may have the possibility to unlock a subject-submitted form if this option is activated for your study. In this case, the **Lock** checkbox appears at the bottom of the subject-submitted form. The form can be locked or unlocked by selecting or clearing the checkbox respectively. Unlocking a form opens it up for editing by users with edit data permission (for example the Investigator).

SE-AHU-081 * Home Admin 1 23 Jan 2019 *	[	Close
🌠 Form is in read-only mode.		
Home administration  🤣 🖱 📽 🖬 🔽	SHOW HISTORY	
Did you take the dose?     When did you take the dose?     How many tablets did you          • Yes      No         • 23 Jan 2019 15:39         • • • • • • • • • • • • • • • •	ou take?	(+)
Click on the scale below to indicate how severe your pain is.		(+)
Have you experienced any adverse reactions?		(+
Have you taken any other medication apart from the study medication?		(+)
Clinical review	ory 📝 Add no	ote

## 4 Data review console

You can perform data review and lock of the forms batch-wise, by using the data review console. To open the data review console, click the icon in the top right corner of the Details page.

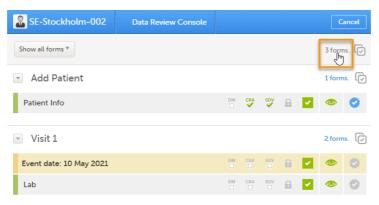


The data review console displays an overview of all forms of a subject that require data review, <u>SDV</u> or lock. It shows which forms have been reviewed, SDV'ed or locked. The green and grey eye icons help you identify which forms you have visited (the most recent version of the form): the green eye icon means that you have visited the last version of the form, the grey eye icon means that you have not visited the latest version of the form.

SE-Uppsala:2-015	Data Review Console						C	ancel
Show all forms *							3 form	ns. 🗸
<ul> <li>Add Patient</li> </ul>							1 form	ns. 🗸
Patient Info		SM ✓	CRA	SDV	8	<b>•</b>	٩	۰
Visit 1							2 form	ns. 🖓
Event date: 10 May 2021		DM	CRA	SDV	8	<b>~</b>		۰
CBC LAB Results (Hemate	ology)		CRA	SDV	6	•		۰.

To review and/or lock the forms:

- Select the form(s) to be reviewed in one of the following ways:
  - Select all forms by clicking the *n* forms link on the top of the page:



- Select all forms within an event, by clicking the *n* forms link to the right of the respective event:

SE-Stockholm-002	Data Review Console						Cancel
Show all forms *							3 forms.
<ul> <li>Add Patient</li> </ul>							1 forms.
Patient Info		DM		SDV V		~	•
Visit 1							2 forms.
Event date: 10 May 2021		DM D		SDV	8	<b>~</b>	•
Lab			CRA	SDV		~	•

 Individually, check the review and/or lock icon for each individual form. Step 2 is not applicable in this case.

SE-Uppsala:2-015	Data Review Console				Re	ady	C	ancel
Show all forms *							3 form	ns. 🖓
Add Patient							1 forn	ns. 🗸
Patient Info		M M	CRA	SDV		2	•	0
Visit 1							2 form	ns. 🗸
Event date: 10 May 2021		<b>M</b>		SDV	<b>Q</b> .,	2		۰.
CBC LAB Results (Hemato	ology)	DM	CRA	SDV	6	2	•	$\Diamond$

In the pop-up that opens, mark with **Data review** and/or **Lock** as needed, and click **Ready**:

All forms, Visit 1	
Verify DM	م 🕪 0
All forms (2)	
Only visited forms (2)	
Lock	۵ ملک
All forms (2)	400
Only visited forms (2)	
Ready	Cancel

The status of the selected forms is updated according to the selected actions.

SE-Uppsala:2-015	Data Review Console					Ready	<b>C</b>	ancel
Show all forms *							3 form	ns. 🗸
<ul> <li>Add Patient</li> </ul>							1 forn	ns. 🗸
Patient Info		₽M ✔	CRA	SDV				۰.
								_
<ul> <li>Visit 1</li> </ul>							2 forn	ns. 🕼
Event date: 10 May 2021		2	CRA	SDV	8			٥.
CBC LAB Results (Hemato	blogy)	2	CRA	SDV	6	-		۰

If any of the marked forms have not been visited by you before, you will be asked whether you want to continue with the action or not. If you choose to continue, the forms will be marked according to your selections, that is, the system will not prevent you from marking unvisited forms as reviewed or locked.

Notel If the study has the setting for item-level SDV enabled, and a form contains items that require SDV but are not visible to you, you will not be able to change the SDV status for the entire form.



2

## Study status and metrics

The current workload can be checked on the Study status or the Metrics pages.



Queries overview

### Queries overview

Published by Viedoc System 2024-10-10

 1. Introduction

 2. Role-based queries

 3. Manually raised queries

 3.1 Pre-queries

 3.1 Pre-query states

 3.2 Queries

 4. Validation queries

 5. Query states

 6. Queries in export output

 6.3 Queries in DDM export

 6.4 Queries in Excel export

 7. Related topics

1 Introduction

A query is a question about data. In Viedoc, queries can be raised:

- Manually, by a user that has permissions for raising queries/pre-queries, after the form has been saved.
- Automatically (validation queries), by the system during data entry, for example when entered data are
  outside specified limits and an edit check fires.

Notel All the related queries are automatically closed, when:

- A form field becomes hidden.
- A form is reset.
- An event is deleted.
- A study event date is cleared (only queries raised on the study event date are closed).

In case of a validation query, when this is resolved by data edit, it is automatically closed. See Validation queries.

Resolving a query always breaks the form signature, even if there are no data changes involved.

A summary of the number of queries is displayed on the study start page, as illustrated below. Note! This is a summary of the whole study and it does not take into consideration the role visibility conditions.

A demo stuc An open-label, multi center, do	-	ng the safety, tolerability and		
3	1			
Study status All sites Sweden Finlar		ids Austria Belgium It	aly United Kingdom	Switzerland
Issues			My statistics	
Resolved queries	Open queries	Forms	Patients added:	113
13	21	71	FPA:	04 OCT 2016
10	<u> </u>	/ 上	LPA:	13 AUG 2018
Review				
CRA %	DM %	SDV %		
3	1	4		
Approval				
Inv. sign %	Queries %	Locked forms %		
0	0	3		

A query is raised in a form field. After a query is raised, the respective form is marked with the red issue icon i:

Letails	
SE-111-002 SITE 1 STATUS COHORT 1	Search Visit 1 Screening 16 Sep 2021 I 7 Sep 2021
66% 2/2 8/12 of study events forms	Visit 2 Ongoing
Demographics 2 • • • • • • • • • • • • • • • • • •	Event date Enrolment Eligibility
Prior and Co Adverse Ever Visit 2 2 🛯 🖀 🕾 🔒	SHOW HISTORY 1
Add new Protocol date	
16 Sep 2021- 30 Sep 2021	23 Sep 2021(-7/+7)
Event date 17 Sep 2021	(⊕)
<b>?</b> Event date Is this the correct visit date?   Sopi	hia Stonestream (826) 17 Sep 2021 11:04 Awaits answer

Important! For all new studies started after release 4.80, the default setting **Enable role-based queries** is selected.

For studies started before release xxx, the default setting **Enable role-based queries** is cleared. For studies started before Viedoc release 4.80, all query actions will still work as usual until role-based queries is enabled.

When the role-based queries option is enabled for your study, it <u>restricts, at study level</u>, the approval of the query resolution to the same user role who raised the query.

#### Notes!

- Enabling role-based queries applies to <u>manually raised queries and pre-queries</u> only.
- This does not apply to <u>validation queries</u> or to <u>data confirmed as missing</u>. All user roles with permisson to add/change queries are still able to approve/reject/edit <u>validation queries</u>.

For more information, see the eLearning lesson on Role-based queries.

## 3

### Manually raised queries

Viedoc Clinic users with permission to raise queries/pre-queries, can manually add a query to any field value.

Manually raised queries can be:

- <u>Pre-guery</u> needs to be promoted and released before it is visible to the site as a normal guery.
- <u>Query</u> visible to the site as soon as either a query was manually raised or a pre-query was released.



### Pre-queries

Viedoc offers support for query review, that is, to review a query before it is released to the site. This is done through pre-queries.

The pre-query process can involve either two or three roles, as follows:

- Two roles: one role with permission to <u>add pre-queries</u>, typically the <u>Data Manager</u>, and one role with
  permission to <u>promote pre-queries and add queries</u>, typically the <u>Monitor</u>.
- Three roles: one role with permission to <u>add pre-queries</u>, for example the <u>Data Manager</u>, one role with permission to <u>promote</u> the pre-query, for example the <u>Sponsor</u>, and one role with permission to <u>add</u> <u>queries</u>, for example the <u>Monitor</u>.

An unlimited number of pre-queries can be added on the same field at the same time.

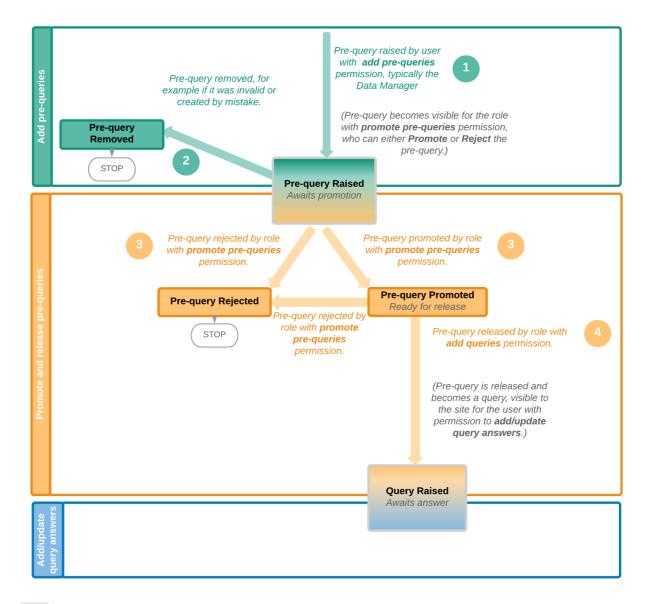
The following image illustrates the main actions that can be performed on a pre-query and all the states the prequery goes through before it is released as a query:

1. The pre-query is added by the user with permission to add pre-queries, typically the Data Manager. As a result, a pre-query is raised, becoming visible for the Viedoc Clinic user with permission to promote prequeries, typically the Monitor.

2. The raised pre-query can be removed, for example if it is invalid or added by mistake.

3. The raised pre-query is promoted or rejected by the Viedoc Clinic user with permission to promote pre-queries, typically the Monitor.

4. The promoted pre-query is released by the Viedoc Clinic user with permission to add queries (typically the Monitor), becoming a raised query that is visible for the Viedoc Clinic user with permission to add/update query answers (typically the Investigator), who will be responsible for resolving the query, as described in Queries.



### 3.1.1 Pre-query states

The table below summarizes the different states of a pre-query in Viedoc Clinic, in the export output (Excel/Operational Data Model (<u>ODM</u>), as well as the possible actions that can be performed on a pre-query and the state this will transition to.

In Viedoc Clinic	In export output	through	becomes
Awaits promotion	PrequeryRaised	Promote pre-query (by Monitor)	PrequeryPromoted (Ready for release)
		Reject pre-query (by Monitor)	PrequeryRejected ( <b>Rejected</b> )
Ready for release	PrequeryPromoted	Release pre-query (by Monitor)	QueryRaised (Awaits answer)
		Reject pre-query (by Monitor)	PrequeryRejected ( <b>Rejected</b> )
Rejected	PrequeryRejected	N/A. No action can be performed on a rejected pre-query.	N/A. Final state
Removed	PrequeryRemoved	N/A. No action can be performed on a removed pre-query.	N/A. Final state

### 3.2 Queries

The query process involves two different roles with different permissions in handling queries:

- One role with permissions to raise and approve queries, typically the Monitor.
- One role with permission to <u>resolve queries</u>, typically the <u>Investigator</u>.

A query is raised in Viedoc either when a query is manually added or when a pre-query is released.

An unlimited number of queries can be added on the same item at the same time.

The following image illustrates the main actions that can be performed on a query and all the states it goes through:

**1.** A query is raised through one of the following:

- a. Manually added query by a user with add/change queries permission
- b. When a pre-query is released. See <u>pre-queries</u> section above.
- c. When a validation query was resolved by confirming data as correct, and then rejected. See <u>Validation</u> <u>queries</u> section later on.

2. A raised query can be removed, for example if it is invalid or added by mistake.

3.a. The user with permission to add/update subject/event/form data and query answers, typically the Investigator, resolves the query by one of the following:

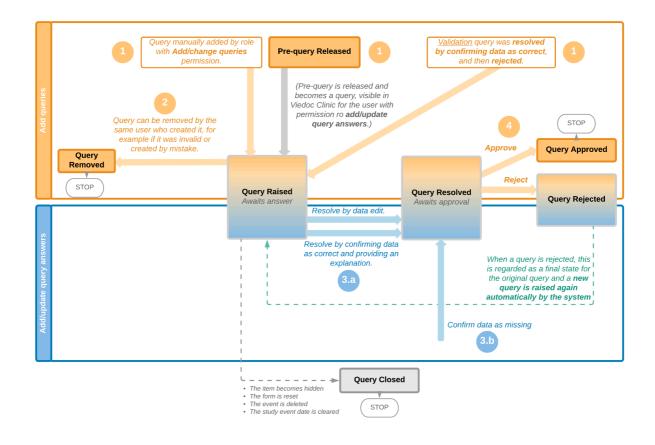
- Editing the data
- Confirming the data is correct and providing an explanation

**3.b.** When confirming data as missing, typically by the **Investigator**, this becomes a resolved query that awaits approval. This type of query can only be <u>approved</u> at step 4 below.

4. The user with permission to add/change queries can:

- Approve the resolved query.
- Reject the resolved query. The old query becomes Rejected and a new query is raised.
   Notel An exception is a query raised as a result of confirming data as missing by the site user (see 3.b. above). This type of query can only be <u>approved</u>.

See also Query states.



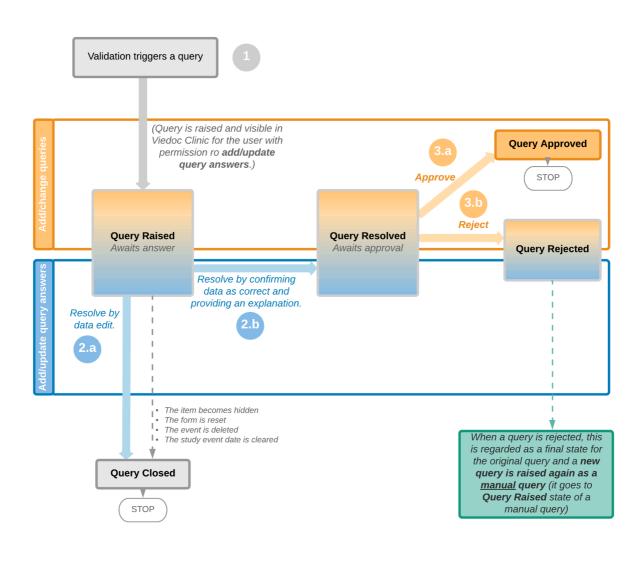
The following image illustrates the main actions that can be performed on a validation query and all the states it goes through:

1. A query is raised as a result of a validation performed by the system.

2. The user with permission to add/update subject/event/form data and query answers, typically the Investigator, resolves the query by one of the following:

- a. Editing the data. As a result, the query is closed.
- b. Confirming the data is correct and providing an explanation. The query is now resolved and waiting for approval.
- 3. The user with permission to add/change queries can:
  - a. Approve the resolved query.
  - b. Reject the resolved query. The old query becomes Rejected and a new query is raised and becomes a <u>manual</u> query. So from here it will follow the path of a manual query from the Query Raised state, as described earlier in <u>Manual queries > Queries</u>.

See also Query states.



## 5 Query states

The table below summarizes the different states of a query in Viedoc Clinic, in the export output (Excel/<u>ODM</u>, as well as the possible actions that can be performed on a query and the state this will transition to.

Note! All the related queries are automatically closed, when:

- The item becomes hidden

- The form is reset .
- The event is deleted -
- The study event date is cleared (only queries raised on the study event date are closed)

In Viedoc Clinic	In export output	Through	Becomes
Awaits answer	QueryRaised	Remove query (by Monitor)	QueryRemoved ( <b>Removed</b> )
		Edit query (by Monitor)	QueryRaised (Awaits answer)
		Resolve query (by Investigator)	QueryResolved (Awaits approval)
Awaits approval	QueryResolved	Approve query (by Monitor)	QueryApproved (Approved)
		Reject query (by Monitor)	QueryRejected ( <b>Rejected</b> )
Rejected	QueryRejected	N/A. No action can be performed on a rejected query. Notel When a query is rejected, this is regarded as a final state for the original query and a new query is raised again automatically by the system.	N/A. Final state
Approved	QueryApproved	N/A. No action can be performed on an approved query.	N/A. Final state
Closed	QueryClosed	N/A. No action can be performed on a closed query.	N/A. Final state
Removed	QueryRemoved	N/A. No action can be performed on a removed query.	N/A. Final state

#### 6 Queries in export output

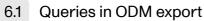
In order to include the query information in the exported file, you need to select Queries under the Type of data in the Data export page. When selecting to include Queries, the Query history option becomes available.

The queries can be exported to the following export output formats:

- Microsoft Excel Office Open Extensible Markup Language (XML)
- Comma-Separated Values (<u>CSV</u>)
  Operational Data Model (<u>ODM</u>) in this case, the **Query history** is not optional, but will be included regardless. For this reason it is not displayed as an option.

Data Export	
All sites Sweden	
Subjects to include (21) All subjects	+
Events and time period All events	+
Forms and items	+
Type of data	-
Signed data  Not Signed data  SDV performed or NA	SDV pending Oueries O Query history
✓ Signed data	✓ Not Signed data
SDV performed or NA	✓ SDV pending
In addition to data, also include the following in the export	(will not be included in Preview data)
Queries	Query history
Review status	Medical coding
Event dates	C Edit status
Uploaded files	

For more details and instructions on how to perform an export, see Exporting data.



For details on how queries look in the ODM export see Queries in ODM export.

### 6.2 Queries in Excel export

For details on how queries look in the Excel/<u>CSV</u> exported file see <u>Queries in Excel export</u>.

## 7 Related topics

- Role-based queries
- <u>Raising and promoting pre-queries</u>
- <u>Raising/Approving/Rejecting queries</u>
- <u>Queries in ODM export</u>
- Queries in Excel export
- <u>Role-based queries</u>
- <u>Metrics</u>
- Video tutorial <u>Issues: Resolve a query</u>



### Raising and promoting pre-queries

## Raising and promoting pre-queries

Published by Viedoc System 2024-10-10

1. Raising a pre-query

- 2. Promoting/Rejecting a pre-query 3. Releasing/Rejecting a pre-query

For an overview of the entire query process see Queries overview.

#### Raising a pre-query 1

To be able to raise a pre-query you must have the permission to add pre-queries, typically the Data Manager (DM).

To add a pre-query:

- 1 Open the form that contains the field the pre-query will be raised on.
- 2 Click the + icon in the top-right corner of the group that contains the respective field. The Add new action pop-up is displayed:
  - Select the field the pre-query will be added to from the drop down list.
  - Choose the type of action Add a pre-query.
  - Enter the pre-query text.

🕀 Add new action	
Select a field	
Result	¥
Choose type of action	
🔵 Add a private note 🖡	
● Add a pre-query ▶?	
Add pre-query text here	
Is this the correct result? (pre-query)	li
Ready	Cancel

3

Click Ready. The pre-query is created and needs to be promoted and released by the user with permission to promote pre-queries (typically the Monitor), in order to be visible as a query for the site staff.

The pre-query can be edited or removed (if invalid or created by mistake) by clicking the Edit or Remove links:

Result	Is this the correct result? (pre-query) By Demo User (317) 13 Aug 2018 15:29 CEST Edit Remove
Awaits	s promotion

A Removed state is a final state for a pre-query.

A pre-query is always marked by this icon:



Once a pre-query has been promoted and released, it becomes a query and it is marked by this icon:

# ?

## 2 Promoting/Rejecting a pre-query

To be able to promote/reject a pre-query you must have the permission to **promote pre-queries**, typically the Monitor.

If there are any pre-queries that await promotion, these are marked as tasks. For details about tasks, see <u>Issues and</u> tasks.

To promote a pre-query:

1 Browse to the task and open the respective pre-query that is marked with state Awaits promotion. A pop-up is displayed where you can either **Promote** or **Reject** the pre-query:

Result			
▶?		e correct result? (p User (317) 13 Aug 201	
Awaits	promotion		
() P	romote	O Reject	
			Close

- 2
- To promote the pre-query, select **Promote** and click **Save query**. The pre-query will enter the **Ready for release** state.
- To reject the pre-query, select **Reject** and click **Save query**. The pre-query state will be **Rejected**. This is a final state for a pre-query.

## 3 Releasing/Rejecting a pre-query

A pre-query can be released after it has been promoted, that is, a pre-query in Ready for release state.

A pre-query waiting to be released is marked as a task. For details about tasks, see Issues and tasks.

After releasing a pre-query, this will become a raised query visible to the site staff. This is why, releasing a pre-query can be performed by a user with permission to add queries.

To release a pre-query:

1

Browse to the task and open the pre-query that is **Ready for release**. A pop-up is displayed where you can either **Release** or **Reject** the pre-query:

▶?	Is this the correct result? (pre-query) By Demo User (317) 13 Aug 2018 15:29 CEST
•	Pre-query promoted! By Demo User (317) 13 Aug 2018 15:30 CEST
_	for release
	e rephrase your query
	is the correct result?

2

- To release the pre-query, select Release, rephrase the query text if needed and click Save query. The pre-query will be released as a <u>query</u> to the site, with state Awaits answer.
- To reject the pre-query, select Reject and click Save query. The pre-query state will be Rejected. This is a final state for a pre-query.

Notel When role-based queries is enabled for your study, when a pre-query is <u>released</u>, (typically by the Monitor):

- The <u>new query</u> visible for the site staff is considered as being <u>raised</u> by the same role that <u>released</u> the pre-query.
- Only that same role will be able to approve/reject the query resolution, for more information, see <u>Role-based queries</u>.

For more information on pre-queries, see Queries overview.



### Raising/Approving/Rejecting queries

## Raising/Approving/Rejecting queries

Published by Viedoc System 2024-10-10

1. Adding a query 2. Editing a query 3. Removing a query 4. Approving/Rejecting a query 4.1 Approving a query 4.2 Rejecting a query

For an overview of the entire query process see Queries overview.

A query can be added/edited/removed/approved by the user with permission to add/change queries.

Notel When the role-based queries option is enabled for your study, all of the above actions are restricted to the same role as the role who raised the query. For more information, see <u>Role-based queries</u>.

## 1 Adding a query

#### To raise a query:

- 1 Open the form that contains the field the query will be raised on.
- 2 Click the + icon in the top-right corner of the group that contains the respective field. The Add new action pop-up is displayed.
  - Select the field the query will be added to from the drop down list.
  - Choose the type of action Add query.
  - Enter the query text.

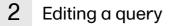
+ Add new action	
Choose type of action <ul> <li>Add a query ?</li> </ul>	
Add query text here	
Is the event date correct?	k
Ready	Cancel

3 Click **Ready**. The query was raised and it is now visible for the site and ready to be resolved, with state Awaits answer:

DEMO	SE-88-011	Home adm. [20 Jun 2022]	Close
×	Form is in read-o	nly mode.	
ŀ	lome adı	M. 1 DM CRA SDV 🔒 i	SHOW HISTORY 1
	Protocol date	2	
	12 Jun 2	2022- 19 Jun 2022	12 Jun 2022(-0/+7)
	Event date		( <del> </del>
	20 Jun 2	2022	
E	<b>?</b> Event date Co	rrect date?   (199) 27 May 2024 14:38 CEST	Awaits answer
	Clinical revi	ew Lock	P Form History

After the query has been raised it can be:

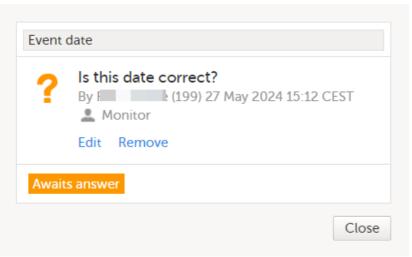
- Resolved by the site (Investigator).
- Edited by any user with permission to add/change queries.
- Removed by any user with permission to add/change queries (in case the query was invalid or added by mistake).



The text of a raised query can be edited as long as the query was not resolved (Awaits answer).

To edit a query:

1 Open the query (from the respective form) and click Edit:



Note! The avatar icon and the user role who raised the query is only visible if role-based queries is enabled for the study. For more information, see <u>Role-based queries</u>.

### 2 Edit the text and click Save query:

Gender		
?	Please check this	1
Awaits	answer	
Save que		Close

The query text is now updated.

## 3 Removing a query

A query can be removed, for example if invalid or added by mistake, as long as the query was not resolved (Awaits answer).

To remove a query:

### 1 Open the query (from the respective form) and click **Remove**:

?	Is this date correct? Please check. By Manual (199) 27 May 2024 15:17 CEST
•	Monitor
	Edit Remove
Awai	ts answer

Note! The avatar icon and the user role who raised the query is only visible if role-based queries is enabled for the study. For more information, see <u>Role-based queries</u>.

Event	date
?	Is this date correct? Please check. By (199) 27 May 2024 15:17 CEST Monitor
Remo	bved
Save o	Query

The query state is **Removed**. This is a final state for a query.

## 4 Approving/Rejecting a query

After the query was resolved by the site (typically the Investigator), it is marked as a task, it is in Awaits approval state and can be either approved or rejected.

Notel An exception is a query raised as a result of confirming data as missing by the site user. This type of query can only be <u>approved</u>.

<ul> <li>1 queries to be approved</li> <li>Form is in read-only mode.</li> </ul>	
Screening 🖪 🖱 🛱 🖥 🖬 🖌	SHOW HISTORY 1
Event date 29 Nov 2021	( <del>]</del>
<b>?</b> Event date Yes this is correct.   (199) 27 May 2024 15:39 CEST	Awaits approval
Clinical review SDV Lock	P Form History
4.1 Approving a query	

To approve a query:

1

### Open the query. The query pop-up opens displaying the list of the query history:

?	Is the event date correct? By 17 Sep 2021 11:11 CEST
•	Data confirmed as correct!Yes, the event date is correct.By17 Sep 2021 13:05 CEST
Awaits	approval
	pprove 🔘 Reject

2 Select Approve and click Save query:

Event	date	
?	Is the event date correct? By 17 Sep 2021 11:11 CEST	
*	Data confirmed as correct!Yes, the event date is correct.By17 Sep 2021 13:05 CEST	
Awaits	approval	
• A	pprove 🔵 Reject	
Save q	uery	Close

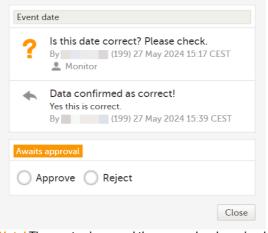
The query is now Approved. This is a final state for a query:

?	Is the event date correct? By 17 Sep 2021 11:11 CEST
•	Data confirmed as correct!
	Yes, the event date is correct.
	By 17 Sep 2021 13:05 CEST
•	Answer approved!
	By 17 Sep 2021 13:19 CEST
ppro	oved

## 4.2 Rejecting a query

To reject a query:

Open the query. The query pop-up opens displaying the list of the query history:



Notel The avatar icon and the user role who raised the query is only visible if role-based queries is enabled for the study. For more information, see <u>Role-based queries</u>.

2 Select **Reject**, optionally rephrase the query and click **Save query**:

Event	date
?	Is this date correct? Please check. By (199) 27 May 2024 15:17 CEST Monitor
•	Data confirmed as correct! Yes this is correct. By (199) 27 May 2024 15:39 CEST
Awaits	approval
() A	pprove 💽 Reject
Pleas	e rephrase your query
Is thi	s date correct? Please check.
Save q	uery

The old query is closed with state Rejected and a new query is raised that Awaits answer:

Fir	al Visit 🛗 📪 🔂 🖬 🚺 show history 🚺 💷
	Protocol date
	<b>18 07 2021- 01 08 2021</b> 25 07 2021(-7/+7)
Ì	Event date
1	Event date 21 07 2021 Event initiated By 22 Jul 2021 15:41 CEST
?	vent date Please check once more! 17 Sep 2021 13:30 CEST Awaits answer
?	vent date Yes, the event date is correct.   17 Sep 2021 13:28 CEST Rejected

1



**Resolving queries** 

## **Resolving queries**

Published by Viedoc System 2024-10-10

1. Resolving a query 1.1 Hard checks

1

## Resolving a query

For an overview of the entire query process see Queries overview.

If a query is raised <u>during data entry</u>, a query message will appear as soon as you leave the field. To resolve the query, click the query message for more details, or correct the data directly before you continue entering data in the rest of the form.

If a query is raised <u>after the form has been saved</u>, the form is marked with a red issue icon i.

To resolve a query:

- 1 Open the form that contains a query.
- 2 Click Edit in the top right corner of the form.
- 3 Depending on if the entered data is correct or not:
  - If the entered data is not correct, enter the correct value in the field that has a query.
  - If the entered data is correct, click the query message, check the **Confirm data is correct** checkbox, and enter an answer.

Note! The avatar icon and the user role who raised the query is only visible if role-based queries is enabled for the study. For more information, see <u>Role-based queries</u>.

Rate	
By	this correct? (199) 27 May 2024 16:24 CEST , Monitor
Awaits answ	wer
Cor	nfirm data is correct?
Your ans	wer
Yes	
Or close thi	s pop-up and change the data
Ready	Close

### 1.1 Hard checks

If you add an edit check to an item, you have the option to allow saving of the form. If you allow it, a query is raised. You can save the form and then take care of the query later.

If you don't allow it, you have to solve the edit check immediately or you cannot save the form. We call this a **hard check**.

Z - Specialities Ja	Number
z - specialities sa	This is a hard check!
Hardcheck (Range: 10 - 20)	Error
Number	Close

See also the video tutorial <u>Issue: Resolve a query</u>.



#### **Role-based** queries

## **Role-based** queries

Published by Viedoc System 2024-10-10

 1. Introduction

 2. Manually raised queries

 2.1 Pre-queries

 2.2 Role-based queries in the Issues list

 2.3 Task count updates

 2.4 Role-based queries in the Excel and ODM export

1 Introduction

When the role-based queries option is enabled for your study, it <u>restricts, at study level</u>, the approval of the query resolution to the same user role as the user who raised the query.

#### **Notes!**

- Enabling role-based queries applies to <u>manually raised queries and pre-queries</u> only.
- This does not apply to <u>validation queries</u> or to <u>data confirmed as missing</u>. All user roles with permisson to add/change queries are still able to approve/reject/edit <u>validation queries</u>.

For more information on validation queries and missing data and the entire query process, see Queries overview.

#### Important!

For all new studies started after Viedoc release 4.80, the default setting **Enable role-based queries** checkbox is selected.

For studies started before release 4.80, the default setting **Enable role-based queries** checkbox is cleared. For studies started before release 4.80, all query actions will still work as usual until role-based queries is enabled.

When role-based queries is enabled for a study, there are some updates to the information that is displayed in Viedoc Clinic. This is to support easily identifying which role raised a query, (if a query was raised by the same role as the current active user). This applies to pre-queries and for manually raised queries in forms, in the query history pop-up, in the **Issues** view and in the export output, as described below.

## 2 Manually raised queries

When role-based queries is enabled:

- A user role with permission to add/change queries can only perform actions on queries raised by their role, for example, a Monitor can only perform actions on queries, for example approve/reject/edit a manual query raised by a user with the Monitor role.
- Users with permission to add/change queries, for example Data Managers or Monitors, can still see which role has raised a query. For these roles, the user name and which user role raised/answered/approved/rejected a query is shown at form level.

E-88-015 * 1 Headache 21 May 2024 00:00 *	Close
▲ 1 queries to be approved	
🌠 Form is in read-only mode.	
Adverse Event 🛛 🖻 🚏 🖬 🗹	SHOW HISTORY 3
SOV AE Id SOV Description	(÷)
1 Headache	
SDV     Start Date     SDV     Ongoing?              21 May 2024 00:00	(÷
SDV     Severity     SDV     Serious? <ul> <li>Mild</li> <li>Moderate</li> <li>Severe</li> <li>Yes</li> <li>No</li> </ul>	Ē
sov     Causality     sov     Action Taken       Probable     *     Dose not changed     *	SDV Outcome of Adverse Event
Causality         Correct   Dr Demo         Dr Demo         (199) 22 May 2024 09:15 CEST           Action Take         Correct   Dr Demo         (199) 22 May 2024 09:15 CEST	Awaits approval
Clinical review SDV Lock	D Form History Add note

If a query was raised by a different user role, one that also has permission to add/change queries, the query will still be visible in the form. The user can see another role's actions on a query, however the query action will be flagged with a strikethrough avatar icon to indicate that no actions can be performed.

Notel The user role who raised the query is displayed by hovering over the avatar icon, as in the image below - **Raised by** (user role), and also in the query history pop-up, as shown below.

In the example below, the user is a Monitor and can only perform actions on the query raised by another user with the Monitor role, shown with the avatar with no strikethrough.

💴 SE-88-015 ▼ 1 Hea	dache 21 May 2024 00:00 🔹		se
1 queries to be approved			
🔀 Form is in read-only mode.			
Adverse Event	2 DM CRA 💱 🔒 🔽	SHOW HISTORY 🖪 🗍	0
sov AE Id Sov Desc 1 Headach	·	Ð	
sov         Start Date           *         21 May 2024 00:00	SDV Ongoing?	œ	
SOV Severity Mild Moderate	sov Serious?	6	
Probable *	SDV Action Taken Dose not changed Y	Outcome of Adverse Event     Not recovered	Raised by Data Manager
	no (199) 22 May 2024 09:15 CEST emo (199) 22 May 2024 09:15 CEST	X Awaits approva	Awaits approval
Clinical review	SDV Lock	D Form History 🔀 Add note	Raised by Monitor

For the roles with permission to add/update query answers (such as Investigators), the role which raised the query is not shown on the form, however, it is shown in the query history pop-up which shows the query history:

I Headache 21 May 2024 00:00 *	Edit	
Form is in view mode. Click 'Edit' to m     Action Taken     S 2 queries to be resolved     Is this correct?		
Adverse Event	SHOW HISTORY 🚺 🤇	D
AE ld Description 1 Headache	Close	(+)
Start Date         Ongoing?           *         21 May 2024 00:00         Image: Ongoing?           •         21 May 2024 00:00         Image: Ongoing?		Ì÷
Severity Serious? Mild Moderate Severe Yes No		(+)
	come of Adverse Event	_
	P Form Histor	ry

#### **Pre-queries** 2.1

When role-based queries is enabled, when a raised pre-query is released, (typically by the Monitor), the resulting new query visible for the Viedoc Clinic user with permission to add/update query answers, typically the Investigator), is considered as being <u>raised</u> by the same role that <u>released</u> the pre-query.

For more information on pre-queries, see Queries overview.

#### 2.2 Role-based queries in the Issues list

When opening the ISSUES list, for user roles with permission to add/change queries, such as Monitors and Data Managers, there is a filter available which is applied by default: My role's queries.

This filter lists all the open manually raised queries that were raised by the same role and that have the status Awaits approval and Awaits answer:

Viedoc Demo Study					
DEMO	The study is currently set to operate in demonstration 6 training mode. Do not input any real data.				
Le Selection · Issues ·					
Search	FOUND 4 ISSUES.		Karolinksa University Hos *	My role's queries *	
ID 4t	REFERENCE #1	ISSUE DETAIL 41	CONFIRMATION #†	STATE #1	
SE-88-013 Karolinksa University Hospital	Unscheduled Assessments Specify which assessments were done at this visit:	? pre-query 1           24 Apr 2024 14-53 CEST           Monitor		Awaits answer	
SE-88-014 Karolinksa University Hospital	Adverse Events Adverse Event Causality	<ul> <li>Verified?</li> <li>22 May 2024 10:29 CEST</li> <li>Monitor</li> </ul>		Awaits answer	
SE-88-011 Karolinksa University Hospital	Baseline Check Questions Any Concomitant Medications	? Check again. 22 May 2024 10:31 CEST Amonitor	Confirmed with physician. 22 May 2024 10-33 CEST	Awaits approval	
SE-88-015 Karolinksa University Hospital	Adverse Events Adverse Event Action Taken with Study Treatment	? Is this correct? 22 May 2024 08:54 CEST Amonitor	Correct 22 May 2024 09:15 CEST	Awaits approval	

The role who raised a query is is shown in the Issue list as part of the ISSUE DETAIL, for all users regardless of their role or permissions.



### Task count updates

The number of tasks to be performed counts only the queries that the user is allowed to perform actions on, based on their user role:

Adverse Events	1 event.
1 Headache 21 May 2024 00:00	22 🖬 🗹
E-88-015 THeadache 21 May 2024 00:00 T	Close
1 queries to be approved     Form is in read-only mode.	
SDV     AE Id     SDV     Description       1     Headache	(+)
and and and the second products a print of the second products of the second second second second second second	and grant grant
SDV     Causality     SDV     Action Taken     SDV     Outcome of Adverse Even       Probable <ul> <li>Dose not changed</li> <li>Not recovered</li> </ul> <ul> <li>Not recovered</li> </ul> <ul> <li>Not recovered</li> </ul>	ent •
<ul> <li>Causality Correct   Rach McKie (199) 22 May 2024 09:15 CEST</li> <li>Action Take Correct   Rach McKie (199) 22 May 2024 09:15 CEST</li> </ul>	Awaits approval Awaits approval Awaits approval

### 2.4 Role-based queries in the Excel and ODM export

The Queries can be exported to the following export output formats:

- Microsoft Excel Office Open Extensible Markup Language (XML)
- Comma-separated values (CSV)
- Operational Data Model (ODM)

After the Viedoc 4.80 release, in the Excel export output, two extra columns are added to the Queries sheet, the two rightmost columns. These are added to existing export versions regardless of whether role-based queries is enabled or not for the study.

These columns contain:

- Information about the user role the role of the user who <u>performed the action on the query</u>. This can be different for the different actions performed on the same query. For example, a Monitor raised the query, an Investigator answered, and a Monitor approved the query.
- Query raised by role the role of the user who <u>raised the query</u> this is always the same for all the actions performed on the same query.



### Exporting data

## **Exporting data**

Published by Viedoc System 2025-02-18

**1. Introduction** 2. Filtering the data to be previewed/exported 2.1 Filtering data by country and site 2.2 Including subjects 2.3 Events and time period 2.3.1 Selecting events 2.3.2 Selecting a time period 2.4 Forms and items 2.5 Type of data 2.5.3 Filter data by review status 2.5.4 Additional information 2.5.4.1 Booklet status 2.5.4.2 Queries and Query history 2.5.4.3 Review status 2.5.4.4 Event dates 2.5.4.5 Uploaded files 2.5.4.6 Pending forms 2.5.4.7 Medical coding 2.5.4.8 Edit status 2.5.4.9 Subject status **3. Export output formats** 3.6 Microsoft Excel / CSV 3.7 CSV 3.8 PDF 3.9 CDISC ODM 4. Export compatibility with previous Viedoc versions 4.10 Output versions 5. How study design impacts data export 6. Previewing data 6.11 Data table 6.11.5 Column menu 6.11.5.10 Column display options 6.11.5.11 Column filter 6.11.5.12 Column selection options 6.11.6 Data table context menu 6.12 Pie chart 6.13 Column chart 6.14 Line chart 7. Data export templates 7.15 Saving export settings as a template 7.16 Applying a data export template 7.17 Editing a data export template 7.18 Deleting a data export template 8. Exporting data 8.19 Latest exports 9. Exporting Data FAQ

## Introduction

1

The Data Export page can be accessed by clicking the Data Export icon in the study start page:



The Data Export page enables you to preview and download study data:

- **Preview** Using the preview feature, you can review the data directly on the screen, and generate different types of graphs from the data. It is also possible to directly access the underlying electronic Case Report Form (<u>eCRF</u>) pages.
- **Export** You can export the data to an external file for further analysis or archiving. Viedoc supports export of data to the following formats:
  - Excel
  - PDF
  - Comma-Separated Values (CSV)
  - Statistical Analysis System (<u>SAS</u>)
  - Operational Data Model (ODM)

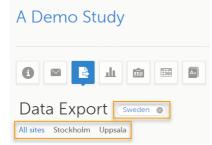
## 2 Filtering the data to be previewed/exported

You can filter the data that you want to preview/export, as described in the following sections.

### 2.1 Filtering data by country and site

If you have access to multiple sites, you can filter the data for a specific country or site.

To filter data for a specific country, click on the name of the country. The selected country appears in blue letters besides the **Data Export** header, while the site(s) for the selected country are listed below:



For a specific country, you can choose to export the data for:

- All sites (default)
- A specific site that you select. The current selection is highlighted in blue text. Note! Only one site can be selected at a time.

To undo the selection of the site, click All sites.

To undo the selection of a country, click the cross  $\mathbf{x}$  icon beside the name of that country.

While filtering for country or site, the number of subjects depicted in between brackets in the **Subjects to include** field is updated accordingly.



### 2 Including subjects

You can choose to include all subjects in the data preview or export, or include a selection of subjects.

To select which subjects to include:

1 Select Include single subject(s).

Click the + icon and select from the drop-down list the subject you want to add. The selected subject appears in the **Subjects to include** field:

	Subjects to include ( 20 ) SE-Stockholm-001				
	O Include all subjects				
	<ul> <li>Include single subject(s):</li> </ul>	SE-Stockholm-001	Å	0	
E	vents and time period	SE-Stockholm-001			

Repeat this step for each subject you want to include in the data preview/export.

To undo the selection of certain subjects, click the - icon, or click the cross x icon next to the subject ID:

Subjects to include (20)	kholm-002 🛞 SE-Stockholm-003 🕲		
O Include all subjects			
Include single subject(s):	SE-Stockholm-002  SE-Stockholm-002	Ð	

### 2.3 Events and time period

You can choose to include all the data or only for certain events. You can also filter the data added or edited during a certain time period.

Note! The available events are the ones existing in the latest design version applied on <u>the first</u> of the selected sites to be included in the export. If there are multiple design versions running for different of the selected sites, you have to select one site at a time in order to get the available events for the respective site.

#### 2.3.1 Selecting events

You can choose to:

- Include all events (default)
- Include Single events. See below the instructions for selecting single events.

To select which events to include:

### 1 Select Single event(s).

2 Click the + icon and select from the drop-down list the event you want to add. The selected event appears in the **Events and time period** field:

Events and time perio		00:00	
Include all events			
• Single event(s):	Visit 1 🔹 🧲	Lab Visit 🔹	• •

Repeat this step for each event you want to include in the data preview/export.

2

Events and time period         Visit 1         Lab Visit		n 01 Jan 2018 00	:00 🛞		
O Include all events					
<ul> <li>Single event(s):</li> </ul>	Visit 1	•	Lab Visit	• •	0

### 2.3.2 Selecting a time period

To include data from a specific time period:

1	Selec	ct the	Time period che	ckbox:							
		•	Time period:	Edited (U	JTC)	,	* b	etwe	en v		
		•	01 Jan 2018 0	0:00	t	٩	and	*	dd MMM yyyy HH:mm	i	٢
								Cu	rrent date & time ூரு		
								Yes	sterday		

- 2 Select one of the following options from the first drop-down list:
  - Edited (UTC) to include data based on the date they were added or last edited. Notel This feature includes data based on Coordinated Universal Time (UTC), not on the local time a user has added or edited data. Note that also the time period should be specified in UTC.
  - Event date to include data based on the event date.
- 3 Select whether to define the time period **until** a certain date, **from** a certain date, or **between** two dates.
- 4 Select the date(s).

Tip! Filtering for data that were added or edited since a specific date is especially useful if you want to see all new and changed data since for example your last monitoring visit.

To undo the selection of a certain time period, click the cross x icon next to it:

Events and time period
All events 🛞 until 16 May 2018 00:00 💿
Include all events
Single event(s): 🛨
Time period: Edited (UTC)
▼ 16 May 2018 00:00 🗰 🕒

## 2.4 Forms and items

You can choose which forms and items to be included in the export output:

- Include all forms and items (default)
- Include single forms and items see the instructions below on how to select forms and items.

Note! Only data belonging to forms and items that exist in the latest effective design applied to <u>the first</u> of the selected sites will be included in the export. Also note that the forms and fields available to choose from are determined by the visibility settings for your user role.

To include data from specific form(s):

#### 1 Select Include single forms and items.

- 2 Select the forms and items to be included, in one of the following ways:
  - Select the checkbox corresponding to a form in the list displayed, to include the respective form with all the items contained. The selected/total number of items will be highlighted in green:



Click the field [..]/[..] items next to the form name, and select/deselect specific items. You
can also use Select all / Deselect all for selecting/deselecting all the items in the form at
once. If selecting only some of the items in the form, the selected/total number of items will
be highlighted in orange:

Forms and items	
Include all forms and items	
<ul> <li>Include single forms and items:</li> <li>Only data belonging to forms and items</li> </ul>	that exist in the latest effective desig
Adverse Events 25/25 items	Che
Concomitant Medications 37	5 items O
Select all Deselect all	
CM Id:	Drug/Medictaion/T
Indication	Dose
Unit Unit	

To undo the selection of a certain form, click the cross x icon next to it:



## 2.5 Type of data

### 2.5.1 Filter data by review status

You can filter the data to be included in the export by the review status, as follows:

- Signed data (selected by default) data that has been signed in Viedoc Clinic (typically by the Investigator). For information on how data is signed see <u>Signing data</u>.
- Not signed data (selected by default) unsigned data.
- SDV performed or N/A (selected by default) data on which the Source Data Verification (SDV) was
  performed (marked by the SDV flag in Viedoc Clinic) and data that does not require SDV.
- SDV pending (selected by default) data that requires SDV that was not performed (not yet marked by the SDV flag in Viedoc Clinic).

#### 2.5.2 Additional information

You can select to include additional information, depending on the <u>export output format</u>, as described in the following sections.

#### 2.5.2.1 Booklet status

For PMS studies, there is an option to include booklet status and booklet status history in the export.

When selecting to include Booklet status, the Booklet status history option becomes available.

Depending on if the booklet status is included in the export or not, the export contains the following information:

- Without Booklet history there is one row for each booklet, providing information about the current status of the booklet.
- With **Booklet history** there is one row for each change in the booklet status, that is, there can be many rows for one and the same booklet.

Booklets in submitted status are not included in exports triggered by users on the sponsor side. The booklets are included to those users when they are received.

Note! Clinic actions to submit/recall back and forth are not available on the sponsor side. Only the latest submit of the booklet that was received by the sponsor is included.

If the **Booklet Status** is selected and the following options: **Require Responsible Investigator** for booklet submission, and **Require Contract** for booklet submission, are enabled for the study, two columns are added to the export.

- Contract number of the selected contract for the specific booklet.
- Responsible Investigator user name (internal ID) of the user selected as Responsible Investigator for the specific booklet.

If **Booklet histor**y is selected at export, the historically selected Contract and Responsible Investigator are included in the respective booklet status. The most recent contract information shall be shown, regardless of the booklet status.

Note! If the contract linked to a booklet is edited, the contract information is updated in the existing row for that booklet in the export performed *after the information was updated*.

The booklet status can be exported to the following export output formats:

- Microsoft Excel Office Open XML
- <u>CSV</u>
  <u>ODM</u> in this case, the Booklet history is not available.

When selecting to include **Booklet status** in the Excel export, a separate **Booklet status** sheet is created that lists all the forms with the following information:

Column name	Description
Site sequence number	A counter that identifies the site globally within the study
Site name	The site name, as set in Viedoc Admin
Site code	The site code, as set in Viedoc Admin
Subject sequence number	A counter that identifies the subject within the site
Subject Id	The Subject ID, in the format configured in Viedoc Designer. The Subject ID is the subject identifier displayed in Viedoc Clinic on the subject card, subject details page, and so on.
Booklet sequence number	A counter that identifies the booklet within the sequence of booklets for the same subject
Booklet Id	The booklet ID, as set in the study design (in Viedoc Designer)
Booklet name	The booklet name, as set in the study design (in Viedoc Designer) and displayed in Viedoc Clinic
Booklet status	One of Not initiated, Initiated, Submitted, Received, Returned, or Frozen
Booklet activity	Initiated, Submitted, Recalled, Received, Frozen, Unfrozen, or Returned
Date & time (UTC)	The date and time of the status change
User name (ID)	The name (ID) of the user who changed the booklet status
Contract number	The number of the selected contract for the specific booklet. Notel This column is present in the export only if the option to link the booklet to a contract is enabled for the study.
Responsible Investigator	User name (internal userID) of the user selected as Responsible Investigator for the specific booklet. Note! This column is present in the export only if the option to link the booklet to a contract is enabled for the study.

### 2.5.2.2 Queries and Query history

When selecting to include Queries, the Query history option becomes available.

The Queries can be exported to the following export output formats:

- Microsoft Excel Office Open Extensible Markup Language (XML)
- <u>CSV</u>
- Operational Data Model <u>ODM</u> in this case, the **Query history** is not optional, but will be included regardless. For this reason it is not displayed as an option.

#### See also:

- <u>Queries in ODM export</u>
- Queries in Excel export

#### 2.5.2.3 Review status

The review status can be exported to the following export output formats:

- Microsoft Excel Office Open <u>XML</u> when selecting one row per item as Layout, the review status is not included in the export.
- <u>CSV</u> when selecting **one row per item** as **Layout**, the review status is not included in the export.
- PDF PDF Archive (PDF/A) only the signature information is included (not SDV, lock status, or CRA review status).
   ODM

- <u>Review status in ODM export</u>
- Review status in Excel export

## 2.5.2.4 Event dates

The event dates can be exported to the following export output formats:

- Microsoft Excel Office Open <u>XML</u>
- <u>CSV</u>
   <u>ODM</u>

When selecting to include Event dates in the Excel export, a separate Event dates sheet is created that lists all the events with the following information:

Column name	Description
Site sequence number	A counter that identifies the site globally within the study
Site name	The site name, as set in Viedoc Admin
Site code	The site code, as set in Viedoc Admin
Subject sequence number	A counter that identifies the subject within the site
Subject Id	The Subject ID, in the format configured in Viedoc Designer. The Subject ID is the subject identifier displayed in Viedoc Clinic on the subject card, subject details page, and so on.
Event Id	The event ID, as set in the study design (in Viedoc Designer)
Event name	The event name, as set in the study design (in Viedoc Designer) and displayed in Viedoc Clinic
Event repeat key	For recurring events, the counter that identifies different occurrences of the same event (identified by the Event ID). Available for output versions Viedoc 4.39 and onward.
Event status	The current status of the event. It can be one of the following: <ul> <li>Initiated</li> <li>Proposed</li> <li>Not Initiated</li> <li>Planned</li> </ul>
Event date	The event date, as set in Viedoc Clinic when the event is initiated
Planned date	The event planned date, as set in Viedoc Clinic when the event is planned
Proposed date	The proposed date for the event, if set in the study design
Window start date	The event time window start date, if set in the study design.
Window end date	The event time window end date, if set in the study design
Initiated by	The name and ID of the user who initiated the event
Initiated date (UTC)	The date and time (UTC) when the event was initiated
Last edited by	The name and ID of the user who last edited the event
Last edited date (UTC)	The date and time (UTC) when the event was last edited

Column name	Description
Design version	The design version/revision that is active for the event

### 2.5.2.5 Uploaded files

When selecting the **Uploaded files** option, the uploaded file together with the thumbnail (if it exists) are part of the Excel, CSV and PDF export output:

- Excel the export file (.xls) together with all the referenced file uploads are included in a zip file.
- CSV, PDF A folder with all the referenced file uploads is included in the export zip file.
- When you select **Include history** (available only for **one row per item**), the current version of the uploaded file will be included as usual, and the previous versions of the files will be stored in subfolders named as the *Edit sequence number*.

The export output (Excel, PDF, <u>CSV</u>, <u>ODM</u>) as well as the **Data preview** provides the following information about uploaded files:

- File Name
- File Size (in bytes)
- File Hash
- Path to where the actual file is located in the exported zip file

The following information on the uploaded file is available in the full history:

- Who has uploaded the file
- Upload date
- Initial/Updated (first file uploaded/update of an existing file)
- File Name
- File Size (in bytes)
- File Hash (MD5)
- Link to file

#### 2.5.2.6 Pending forms

The pending forms can be exported to the following export output formats:

Microsoft Excel - Office Open <u>XML</u>

<u>CSV</u>

Forms are considered pending when they are uninitiated in initiated events. This applies to all types of events, including subject-initiated events. For repeating forms, if the first instance of the form is uninitiated, the form is considered pending. Resetting a form results in that form being pending.

When selecting to include **Pending forms** in the Excel export, a separate **Pending forms** sheet is created that lists all the forms with the following information:

Column name	Description
Site sequence number	A counter that identifies the site globally within the study
Site name	The site name, as set in Viedoc Admin
Site code	The site code, as set in Viedoc Admin
Subject sequence number	A counter that identifies the subject within the site
Subject Id	The Subject ID, in the format configured in Viedoc Designer. The Subject ID is the subject identifier displayed in Viedoc Clinic on the subject card, subject details page, and so on.
Event sequence number	A counter that identifies the event within the sequence of events for the same subject
Event Id	The event ID, as set in the study design (in Viedoc Designer)

Column name	Description
Event name	The event name, as set in the study design (in Viedoc Designer) and displayed in Viedoc Clinic
Event repeat key	For recurring events, the counter that identifies different occurrences of the same event (identified by the Event ID). Available for output versions Viedoc 4.39 and onward.
Activity Id	The activity ID, as set in the study design (in Viedoc Designer)
Activity name	The activity name, as set in the study design (in Viedoc Designer) and displayed in Viedoc Clinic
Form Id	The form ID, as set in the study design (in Viedoc Designer)
Form name	The form name, as set in the study design (in Viedoc Designer) and displayed in Viedoc Clinic
Event date	The event date, as set in Viedoc Clinic when the event is initiated
Pending since	The date and time since when the form has been pending
	This is not always the date when the event was initiated. For a form that has been hidden due to a visibility condition, the pending since date is the date when the form is made available.

### 2.5.2.7 Medical coding

The medical coding can be exported to the following export output formats:

- Microsoft Excel Office Open XML. For details, see Medical coding in Excel export.
- <u>CSV</u> similar output information as in Excel.
- ODM for details, see Medical coding in ODM export.

#### 2.5.2.8 Edit status

The edit status can be exported to the following export output formats:

- Microsoft Excel Office Open XML
- <u>CSV</u>
- PDF PDF/A
- ODM

### 2.5.2.9 Subject status

The subject status can be exported to the following export output formats:

- Microsoft Excel Office Open XML
- <u>CSV</u>
- ODM

The sheet Calculated subject status contains the following columns:

- Site sequence number
- Site name
- Site code
- Subject sequence number
- Subject Id
- Screened state
- Screened on date/datetime (site local)
- Enrolled state
- Enrolled on date/datetime (site local)
- Completed state
- Completed on date/datetime (site local)
- Withdrawn state
- Withdrawn on date/datetime (site local)

# 3 Export output formats

Select the export output format of the data under Output format > Output to:

Output form		activity 🔕	
Output to:	Microsoft Excel - Office Open XML		
Data anali	Microsoft Excel - Office Open XML		
Data groupi	CSV - Comma-separated values 🖑 2		
Layout	PDF - Pdf Archive 3		<b>.</b>
	CDISC ODM - XML 4	per activity	1 row per item
Output versi	on: Viedoc 4.39	•	

You can export the data to one of the following formats:

1. Microsoft Excel - Office Open XML

#### 2. <u>CSV</u>

3. PDF - PDF/A

#### 4. <u>ODM</u>

## 3.1 Microsoft Excel / CSV

Viedoc uses Microsoft Excel Open XML format which is compatible with Excel version 2007 and later.

For details about the Excel export options and the format/structure of the output file, see Excel export.

## 3.2 CSV

The output of the <u>CSV</u> export is similar to the Excel export output. The CSV export output consists of a zip archive containing one CSV file that corresponds to each sheet from the Excel export. For details about the Excel export options and the format/structure of the output file, see <u>Excel export</u>.

For the CSV export and **one row per activity** selected layout, there is also the option to **Include corresponding SAS** script. For details, see Exporting for SAS.



For details about the PDF export and the format/structure of the output file, see PDF export output.

## 3.4 CDISC ODM

The Clinical Data Interchange Standards Consortium (CDISC) Operational Data Model (ODM) is a vendor neutral, platform independent format for interchange and archive of clinical trials data. The format includes the clinical data along with its associated metadata, administrative data, reference data and audit information. All of the information that needs to be shared among different software systems during the setup, operation, analysis, submission or for long-term retention as part of an archive is included in the model.

This is used for exporting the data to an <u>ODM</u> file, with or without Viedoc extensions. To include the Viedoc extensions in the exported file, select the **Include extensions** checkbox. Viedoc extensions are Viedoc-specific settings that cannot be described as part of the CDISC standards. If the exported file is to be imported to Viedoc at a future time, the checkbox should be selected.

Select SAS compliant XML to automatically populate the SAS field name and the SAS dataset name.

The ODM export file is built up as follows:

- The Study tag contains the information on the study settings, study design, workflow.
- The AdminData contains data about the user and site settings.
- The ClinicalData tag contains the data that was filled in in Viedoc Clinic.
- The Association tag contains information about the performed actions such as <u>SDV</u>, raising and approving queries, medical coding, lock, <u>CRA</u> and <u>DM</u> reviews.

#### See also:

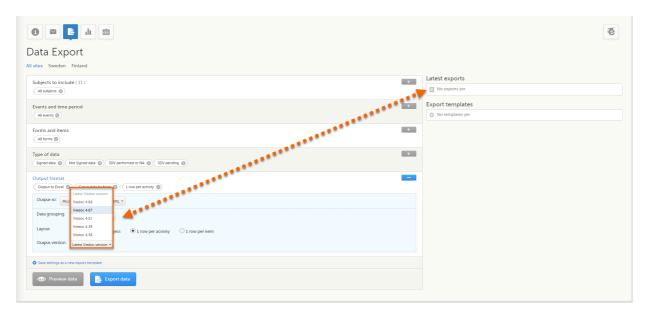
- Queries in ODM export
- Medical coding in ODM export
- Review status in ODM export
- <u>Excel export</u> (See for more information on how to export Audit trail history.)

## 4 Export compatibility with previous Viedoc versions

It is possible to select the Viedoc version that the exported file should be compatible with. This option enables you to export files that have the same format as files exported from previous Viedoc versions.

Notel This functionality is optional and set in the study settings in Viedoc Admin. It might not be activated for your study.

If activated for your study, you can select the Viedoc version that you wish the exported file to be compatible with under **Output format and export**, from the **Output version** drop-down menu. If you wish to create an export file according to the latest Viedoc version, select **Latest Viedoc version**:



The Viedoc version used for data export is listed in the Latest exports area on the right side of the export page.

The exported file contains information about which Viedoc version was used to create it. You can find information about the Viedoc version in the following places:

- For Excel, the Viedoc version used is displayed in the README sheet.
- For <u>CSV</u>, the Viedoc version used is displayed in the *README* text file.
- For PDF, the Viedoc version used is displayed on every page in the footer or side bar.
- For <u>ODM</u>, the Viedoc version used is displayed in the *Export version* extension.

### 4.1 Output versions

The Viedoc versions available in the **Output version** dropdown menu are <u>only</u> those versions in which changes to the data structure were introduced.

As of Viedoc release 4.79, the following output versions are available:

Output version	Changes in data structure
Latest Viedoc version	When choosing <b>Latest Viedoc version</b> , the exported data will automatically follow the structure of the latest Viedoc release in which changes to the data structure were introduced.
Viedoc 4.79	Introduction of a number of changes to the ODM data export. See the table below for details.
Viedoc 4.77	For studies where item-level SDV is enabled, when exporting review status, the SDV sheet in the CSV and Excel data exports will include only the items that require SDV and are visible to the user. On the Review status sheet, items that do not require SDV are indicated with N/A.
Viedoc 4.68	Introduction of pdf archive export system check which splits the archive into one pdf file per subject and stores resultant PDF in a zip file.
Viedoc 4.67	Introduction of two new columns for approving medical coding: "approved by" and "approved on date".
Viedoc 4.51	Introduction of three new form repeat keys and the table of contents in the PDF export, see the table below for details
Viedoc 4.39	Introduction of repeating forms and recurring events, see the table below for details.
Viedoc 4.38	Original output format (Viedoc versions 4.38 or older).

In Viedoc 4.79, the following changes to the export output were introduced:

File type	Changes in the export output format
ODM	Introduction of support for partial datetime, date, and time. This is now the default type when exporting designs and data in ODM format. Partial dates as per the ISO 6801 standard are written up to the most detailed value available.
	This makes the export compliant with CDISC ODM.
ODM	When exporting a design to ODM, multi-selection code lists are handled as follows:
	Checkbox item definitions are split by code list items.
	<ul> <li>During metadata export, checkbox ItemDef is replaced with one for each code list item.</li> <li>For clinical data export, the comma-separated values are replaced for the checkbox with ItemData for each respective value.</li> </ul>
	For example, when splitting a checkbox ItemDef with OID="CHK" and code list IDs "Yes" and "No", the split checkbox ItemDefs will have the OIDs "CHKYes" and "CHKNo", respectively. That is, the original OIDs and the code list IDs are prefixed with two underscore characters and separated by two underscore characters.
	In Viedoc Designer, checkbox items are exported as multiple ItemDefs - one for each selection value. In Viedoc Clinic and the Viedoc API: In the latest export version, checkboxes are exported as separate items for metadata and clinical data. In previous export versions, checkboxes are exported as one item.
	This has been introduced to be compliant with CDISC ODM.

File type	Changes in the export output format
ODM	<b>Bug fix</b> : In the ODM data export, the content of the Question element for study event items and booklet forms was not complete. According to the CDISC standard, the element should include one of the TranslatedText attributes. This is now solved, and the Question element is populated with a string related to the corresponding OID.
	This is applied to all export versions.
ODM	<b>Bug fix</b> : In the ODM data export, the MeasuremetUnit.Name contained HTML code, making it non- compliant with the CDISC standard. This is now solved, and the HTML code is removed from the name.
	This is applied to all export versions.
ODM	<b>Bug fix</b> : In the ODM data export, the translated text was missing for meta.Protocol.Description.TranslatedText. This is now solved, and the body is populated with the protocol name, as visible on the design overview page.
	This is applied to all export versions.
ODM	<b>Bug fix</b> : In the ODM data export, the Length attribute was incorrect, making it non-compliant with the CDISC standard. This is now solved, and Length is populated as per the ItemDef data type.
	This is applied to all export versions.
ODM	<b>Bug fix</b> : In the ODM data export, there was a mismatch between the item data type and the code list data type for checkboxes. This is now solved, and the checkbox data is split into different items, in the same way as for CSV and Excel exports.
	This is implemented in a new export version, version 4.79.
ODM	<b>Bug fix</b> : In the ODM data export, the study OID and ClinicalData didn't respect the Production/Demo mode for sites. This is now solved, and the study OID and ClinicalData are populated based on the Production/Demo mode of the exported study.
	This is applied without a new export version.
ODM	<b>Bug fix</b> : In the ODM data export, non-repeating forms included a repeat key, making the ODM data export non-compliant with the CDISC standard. This is now solved.
	This is implemented in a new export version, version 4.79.
ODM	<b>Bug fix</b> : In the ODM data export, the KeySet elements had an unregistered value for the ItemOID attribute, making the ODM data export non-compliant with the CDISC standard. This is now solved, and the KeySet elements reference items within the same MetaDataVersion.
	This is implemented in a new export version, version 4.79.
ODM	<b>Bug fix</b> : In the ODM data export, the attribute OrderNumber of the element StudyEventRef was not valid with respect to its type, integer. This is now solved, and StudyEventRef elements have unique and non-empty consecutive order numbers.

File type	Changes in the export output format
ODM	<b>Bug fix</b> : In the ODM data export, there was a data type mismatch between CodeList and ItemDef, making the ODM data export non-compliant with the CDISC standard. This is now solved by always having a matching data type between ItemDef and CodeList.
	This is applied to all export versions.
ODM	<b>Bug fix</b> : In the ODM data export, the element MeasurementUnitRef had an unregistered value for the MeasurementUnitOID attribute, making the ODM data export non-compliant with the CDISC standard. This is now solved, and measurement units not referenced in any MetaDataVersion are not included in the ODM data export.
	This is applied to all export versions.
ODM	<b>Bug fix</b> : In the ODM data export, the Alias names were not correctly populated. This is now solved, and any code list item aliases with empty names are removed at import and export - and the Alias names are populated with the context values.
	This is applied to all export versions.
ODM	<b>Bug fix</b> : In the ODM data export, the SAS field name and the SAS dataset name were not populated. This is now solved, and the SAS field name is populated based on the ItemDef OID, and the SAS dataset name is populated based on the FormDefOID, which means that the OIDs are SAS-compliant. There is an option for this in the data export.
	This is applied to all export versions.
ODM	<b>Bug fix</b> : In the ODM data export, revisions linked to study events and revisions linked to forms requiring approval of the new design revision were not included. This is now solved.
	This is applied to all export versions.
ODM	<b>Bug fix</b> : In the ODM data export, alerts had repeating order numbers. This is now solved, and the order numbers for all study settings alerts in Viedoc Designer are removed.
	This is applied to all export versions.
ODM	<b>Bug fix</b> : In the ODM data export, the item group containing the reference data items was not added to the MetaDataVersion. This is now solved.
	This is applied to all export versions.

In Viedoc 4.51, the following changes to the export output were introduced:

File type	Changes in the export output format
Excel	<ul> <li>Addition of three columns for the new form sequence numbers introduced:</li> <li>SubjectFormSeqNo - Counter that uniquely identifies the instance of a specific form on a subject level, that is, it starts with 1 and is incremented each time a new instance of the form is created for that subject.</li> <li>OriginSubjectFormSeqNo - For a copied form instance, it identifies the form instance from which data was copied for the first time. For the first instance of the form (that is, not copied) it gets the value of the SubjectFormSeqNo .</li> <li>SourceSubjectFormSeqNo - For a copied form instance, a counter that identifies the source of a copied form instance (the form instance the data was copied from). It gets the value of the SubjectFormSeqNo from which the form instance was copied. For the first instance of the first instance of the form (that is, not copied) it is empty.</li> </ul>
ODM	Three new form sequence numbers were introduced, as Viedoc extensions: v4:SubjectFormSeqNo , v4:OriginSubjectFormSeqNo and v4:SourceSubjectFormSeqNo , within the FormData , right after the FormRepeatKey .
PDF	A table of contents was added to the PDF archive, starting on page 2 of the file.

#### In Viedoc 4.39, the following changes to the export output were introduced:

File type	Changes in the export output format
Excel	$\label{eq:Addition} Addition \ of \ a \ column \ for \ Form \ sequence \ number \ ( \ Form \ Seq \ ) \ that \ contains \ the \ \ Form \ Repeat \ Key \ .$
ODM	The FormRepeatKey now contains the activity ID as well, in the following format: FormRepeatKey\$ActivityId . The ExportVersion attribute has been added to the ODM.
PDF	The summary formats are used to display the event and form names.

## 5 How study design impacts data export

When exporting data from Viedoc, the system determines the available events, forms, and data points based on the **study design version** applied to the **first selected site**. Understanding how this works is important when a study includes sites with different study designs or multiple design versions.

#### What happens when study designs differ?

If a study contains multiple study designs or different versions across sites, the exported data is structured based on the design of the first selected site. This means:

- The available events in the export are those that exist in the latest design version applied to the first site selected.
- The forms and items included in the export are those that exist in the latest effective design applied to the first selected site.
- The columns (data points) in CSV/Excel exports reflect the latest effective design used by the first selected site.

### What does "first selected site" mean?

The first selected site is the **first site in the study** that is chosen for export. The exact determination depends on:

- The order in which sites appear in the selection list.
- The default site selected when multiple sites are chosen.
- The system logic (which may use the site with the lowest ID or first site in a country, if applicable).

*Example:* If a study has sites in **Germany, Sweden, United States, and Japan**, and Germany is the first selected site, the export will be based on the latest design version applied to the first site in Germany.

#### Selecting multiple sites with different study designs

If multiple sites are selected and they have different design versions, users must:

- Select one site at a time to get events and forms applicable to that site's specific design.
- Be aware that selecting multiple sites with different designs may result in missing or misaligned data.
- Verify design versions with an **Admin** if unsure which design applies to a site.

#### Best practices to ensure accurate exports:

- Check in Viedoc Admin if all sites have the same current effect design version before exporting data.
- If all sites are on the same design version, then it is fine to export all sites at the same time.
- If sites have different design versions, perform individual exports for each design version.
- Review exported data against the annotated CRF (link) or complete configuration report (link) of the design version to ensure completeness and consistency.

Notel User visibility settings affect data exports. If an item is missing, check that your user role has the necessary permissions, and that the item exists in the latest design version applied to the first selected site.

#### Example scenario: How study design affects data export

Scenario: A study has Site A using Design Version 1.0, and Site B using Design Version 2.0. When exporting data:

- If Site A is selected first, the export includes only forms and events from **Design 1.0**.
- If Site B is selected first, the export includes only forms and events from **Design 2.0**.
- If both sites are selected together, the system may only include data compatible with the first selected site's design.

## Previewing data

The Preview data button is only available when you have selected Excel or CSV as output format for the export.

The preview is not available when you have selected 1 row per item.

## 6.1 Data table

6

On the data tab, you can preview the data in table format:

Export Data F	Preview / AutoRecu	rring			Close
	idda.	<u>&gt;&gt;</u>		$\searrow$	
Included forms		Filter 2 Search		4	<b>5</b>
Site name ≡	Site code ≡	Subject Id ≡	Event name =	Event date =   Activity na	ame =   Completion period =
<b>v</b>		<b>v</b>	<b>Σ</b>	<b>v</b>	▼
AutoRecur1	AR1 6	AR1-50001	Screening - Visit 1a	2018-01-15	Prior to or during the BPS
AutoRecur1	AR1	AR1-50002	Screening - Visit 1a	2018-01-17	After the BPS
AutoRecur1	AR1	AR1-50003	Screening - Visit 1a	2018-01-17	After the BPS
AutoRecur1	AR1	AR1-50004	Screening - Visit 1a	2018-01-17	Prior to or during the BPS
AutoRecur1	AR1	AR1-50005	Screening - Visit 1a	2018-01-17	Prior to or during the BPS
AutoRecur1	AR1	AR1-50006	Screening - Visit 1a	2018-01-17	After the BPS
AutoRecur1	AR1	AR1-50008	Screening - Visit 1a	2018-01-17	After the BPS
AutoRecur1	AR1	AR1-50009	Screening - Visit 1a	2018-01-17	Prior to or during the BPS
AutoRecur1	AR1	AR1-50010	Screening - Visit 1a	2018-01-17	Prior to or during the BPS
AutoRecur1	AR1	AR1-50013	Screening - Visit 1a	2018-01-17	Prior to or during the BPS
AutoRecur1	AR1	AR1-50014	Screening - Visit 1a	2018-01-17	After the BPS
AutoRecur1	AR1	AR1-50015	Screening - Visit 1a	2018-01-17	Prior to or during the BPS
Rows: 1,009					

Cross-check 8

1. If you have selected Group data by form, you can select the form for which you want to display data.

2. Use the **Filter** text box to filter the preview data by any text in any field. The preview is filtered on all words in this field.

3. Toggle between spacious view and compact view.

4. Click a column header to sort the data in ascending order. Click again to sort in descending order. A third click removes the column sort order. To rearrange the order of the columns in the table, simply click on a column header and drag the column sideways.

5. Click to open the column menu. For more information, see Column menu.

6. Click to access the column filter. For more information, see Column filter.

7. Click any hyperlink data point in the table to view the underlying form in read-only mode.

8. Select **Cross-check** to display a second data table. This lets you cross-check data between the two tables. Form selection and the filtering and sorting of data in the second table are independent of the settings in the first table.

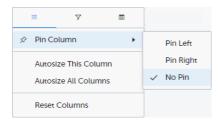


The column menu contains:

column display options
column filter
column selection options

For more information, see the following sub-sections.

## 6.1.1.1 Column display options



**Pin Left/Right** makes a column remain visible in the leftmost or rightmost position when you scroll sideways. Select **No Pin** to unpin the column.

Autosize adjusts the column width to the width of the text in the column.

Reset Columns resets the pinning, sizing, and order of columns to the initial state.

6.1.1.2 Column filter

Use the column filters to narrow down the selection of preview data.

γ	
✓ Text Filter	1
Contains	•
1	
O AND	⊙ or 2
Contains	•
2	
	Clear
🗹 (Select All)	
🔽 1 = Mild	3
<mark>2</mark> 2 = Moderate	-
	Reset

1. Depending on the type of item in the column, you can specify one of these types of filters:

- Text filter with the following filter operators:
  - Contains
  - Not contains
  - Equals
  - Not equal
  - Starts with
  - Ends with

Form items that are radio buttons, drop-down menus, checkboxes, dates, or date/time items are treated as text.

Note! The text filters are case-insensitive.

- Number filter with the following filter operators:
  - Equals
  - Not equal
  - Less than
  - Less than or equals
  - Greater than
  - Greater than or equals
  - In range

2. Once you have specified a filter, you can specify another one for the same column, either as an AND filter or an OR filter.

3. Predefined filter options based on the data available in the column.

#### 6.1.1.3 Column selection options

Select the columns to be displayed in the preview table.

	=	7	m
>	Search		
> [	System data		A
	Z Site name		
	Site code		
~	Subject Id		
	Z Event name		
	Z Event date		
~	Activity name		
~	Completion period		-

Use the **Search** field to search for columns.

By default, system data is excluded from the table. To include system data, select the column(s) to include from the **System data** category. Note that some system data columns are only available when you have selected 1 row per activity. For more information, see <u>Excel export</u>.

### 6.1.2 Data table context menu

When you right-click in a cell in the data table, this context menu is displayed:

Ū	Сору	Ctrl+C
D	Copy with Headers	
⊥	Excel Export (.xlsx)	

Copy: Copies the cell value to your clipboard.

Copy with Headers: Copies the cell value and its column header to your clipboard.

**Excel Export**: Exports the preview data on the data tab. The resulting Excel file will have the same sorting and filtering of data and order of columns as the preview.

## 6.2 Pie chart

Select the data set you wish to plot in a chart, and click Draw:

- Karley Export Data Preview / A demo study Close
Series/Categories
Site name * Draw
Site name
Academic Hospital Uppsala: 11 %
King's College Hospital London: 7 % VU Medical Center Amsterc
University of Brescia: 4 % Jniversity Medical Center Freiburg: 7 %
Helsinki University Hospital: 7 % Charite University Hospital B

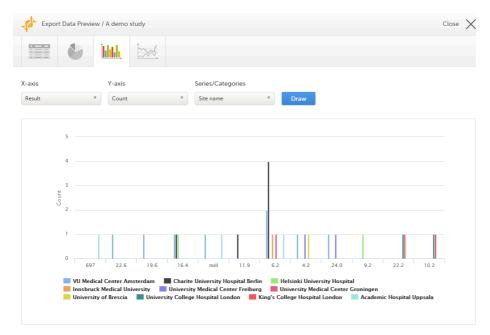
If you have selected **Group data by form**, you can only choose data sets from the form you have selected on the data table tab.

Click any data point to view its details.

Note! The pie chart has access to the same data as the data tab. That means that if you applied filters on the data tab, only the filtered data will be available in the pie chart.

## 6.3 Column chart

Select which data you would like to plot on the X-axis and Y-axis, which series should be created, and click Draw:



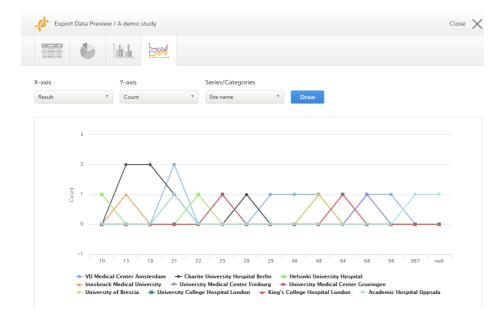
If you have selected **Group data by form**, you can only choose data sets from the form you have selected on the data table tab.

Click any column to view details of the data.

Notel The column chart has access to the same data as the data tab. That means that if you applied filters on the data tab, only the filtered data will be available in the column chart.

## 6.4 Line chart

Select which data you would like to plot on the X-axis and Y-axis, which series should be created, and click Draw:



If you have selected **Group data by form**, you can only choose data sets from the form you have selected on the data table tab.

Note! The line chart has access to the same data as the data tab. That means that if you applied filters on the data tab, only the filtered data will be available in the line chart.

When you have made settings for an export, you can save them as a template. Then you, and optionally others, can use the template to easily make new exports with the same settings.

7.1 Saving export settings as a template

To save your settings as a template:

1 Click Save settings as a new export template.



2

In the pop-up that is displayed, enter a name for the template and select whether it should be private or shared.

If you select **Shared**, you are prompted to also select the roles that will be able to use the template. The roles available in the drop-down list are the ones with export permissions for the latest effective design of the study in question.

	New export template	
1	Name	
	CDISC ODM template	
(	Private  Shared	
	Select role(s)	
	Investigator	
	Study Coordinator	
	Monitor	ł
ll Mar	Project Manager	
	Data Manager	
	Sponsor	
	Medical Coder	
	Medical Coding Reviewer	

3 Click Save. Now the Export templates list is displayed, with your newly created template at the top of the list:

Export templates Show All templates  CDISC ODM template Last edited 03 Apr 2020 07:29 UTC by Study coordinator export Last edited 11 Apr 2020 11:47 UTC by SAS export Last edited 31 Mar 2020 08:52 UTC by All template Last edited 31 Mar 2020 08:52 UTC by All template Last edited 31 Mar 2020 08:52 UTC by All template Last edited 31 Mar 2020 08:52 UTC by All template Last edited 31 Mar 2020 08:52 UTC by All template Last edited 31 Mar 2020 08:52 UTC by All template Last edited 31 Mar 2020 08:51 UTC by All template Last edited 31 Mar 2020 08:51 UTC by All template Last edited 31 Mar 2020 08:51 UTC by All template Last edited 31 Mar 2020 08:51 UTC by All template All templates All temp						Close
Last edited 03 Apr 2020 07:29 UTC by	Exp	port templates	Show	All temp	lates	Ŧ
Last edited 01 Apr 2020 11:47 UTC by      SAS export Last edited 31 Mar 2020 14:04 UTC by      Mar 2020 14:04 UTC by      Mar 2020 00:52 UTC by      Shared to all	ø			¢	/	Ê
Last edited 31 Mar 2220 14:04 UTC by     My export template     Last edited 31 Mar 2020 08:52 UTC by     Shared to all	ø			¢	/	â
Last edited 31 Mar 2020 08:52 UTC by	ø			¢	/	盦
	ø			¢	/	Ê
	ø			£		盦

## 7.2 Applying a data export template

To apply a data export template:

- 1
- Click View all templates in the Export templates area of the Data export page.

Subjects to include (3)	Latest exports
(Mudijette 🔘	31 Mar 2020 15 02 UTC [Ready] Vedoc 431, 3 subjects, CDISC ODM - XML, (251388)
Events and time period	S1 Har 2020 14:05 UTC [Ready]     Webb (-51, 5 subjects, CSV - Comma reparated values, 1 now po activity, (5300)
Forms and items	<ul> <li>31 Mar 2020 08:24 UTC [Ready]</li> <li>Wedoc 451, 2 subjects, CDSC COM - XMI, [245678]</li> </ul>
(Mitoms @)	31 Mar 2020 08:23 UTC (Ready) Vedec 431, 2 subjects, Microsoft Facel - Office Open 394, 3 row
Type of data Signed data O Not Signed data O SDV performed or NA O SDV pending O	presactivity (2000)     Wave all experts
Output format	Export templates
Output to XML	CDISC ODM template
O Service time an a new opport language	Study coordinator export
	Ø SAS export
🛃 Export data	Ø My export template
	O Shared to all
	View all templates

2

Click the apply icon for the template that you want to apply.

	Close
Export templates	Show All templates
CDISC ODM template Last edited 03 Apr 2020 08:13 UTC by Maria Eklund	<u>e</u> 🗾 🛍
Study coordinator export Last edited 01 Apr 2020 11:47 UTC by Maria Eklund	Apply 🖬
SAS export Last edited 31 Mar 2020 14:04 UTC by Maria Eklund	<i>₹ /</i> â
My export template     Last edited 31 Mar 2020 08:52 UTC by Maria Eklund	<i>₹ /</i> 💼
Shared to all Last edited 31 Mar 2020 08:51 UTC by Maria Eklund	<i>₹ /</i> ≘

3 Click Export data to perform an export with the settings in the template.

Tipl Alternatively, you can use the quick access apply, available in the **Export templates** area:

Export templates
CDISC ODM template
Apply oordinator export
SAS export

## 7.3 Editing a data export template

To edit a data export template:

1 Click View all templates in the Export templates area of the Data export page.



2

The Export templates list is displayed. Click the edit icon for the template that you want to edit.

кр	oort templates	Show	All templ	ates	
¢	CDISC ODM template Last edited 03 Apr 2020 07:29 UTC by Maria Eklund		¢	ß	Ô
¢	Study coordinator export Last edited 01 Apr 2020 11:47 UTC by Maria Eklund		¢	1	Ô
¢	SAS export Last edited 31 Mar 2020 14:04 UTC by Maria Eklund		¢	1	Ô
¢	My export template Last edited 31 Mar 2020 08:52 UTC by Maria Eklund		¢	1	Ô
¢	Shared to all Last edited 31 Mar 2020 08:51 UTC by Maria Eklund		¢	1	Ô

# 3 In the pop-up that is displayed, you can edit the name of the export template and the settings for **Private/Shared**.

Notel You can only edit a template that you created yourself.

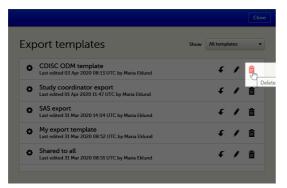
## 7.4 Deleting a data export template

To delete a data export template:

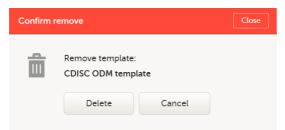
1 Click View all templates in the Export templates area of the Data export page.

Subjects to include (3)	+ Latest exports
Musieur D	31. Mar 2020 15:02 UTC [Ready] Vedoc 4:51; 3 subjects; CDISC OCM - XMI; [251388]
Events and time period	31 Mar 2020 14:05 UTC (Ready)     Vedoc 4:31, 3 subjects: C3V - Comma-operated values: 1 nov p     activity (13/0)
Forms and items	31 Mar 2020 08:24 UTC (Ready)     Vedoc 451, 2 subjects, CDSC 00M - XM, (245648)
(Milons ()	31. Mar 2020 08:23 UTC (Ready) Vedec 431, 2 subjects Microsoft Facel - Office Open 204, 1 so per prior (2020)
Type of data Samed data O Not Samed data O StV astromed or NA O StV sendma O	+ perating (N93) Year all sports
spectals ( netsigned all ( surprising or in () surprising ()	
Output format	<ul> <li>Export templates</li> </ul>
Output to XML	CDISC ODM template
O See settings to a new opport template	Study coordinator export
	Ø SAS export
Export data	O My export template
	Shared to all

2 The Export templates list is displayed. Click the trash can icon for the template that you want to delete.



3 In the pop-up that is displayed, click **Delete**.



Note: You can only delete a data export template that you created yourself.

# 8 Exporting data

To perform a data export:

- 1 Filter the data to be exported. See <u>Filtering the data to be exported</u>.
- 2 Select the <u>Output format</u>.
- 3 Optionally, select the <u>Output version</u>.
- 4 Optionally, <u>preview the data</u> to be exported.

5

Click **Export data**. The status of the export is displayed in the **Latest exports** area, on the top of the list. When the export is completed, you can download the exported file:



The exported file is downloaded locally. The filename is generated as follows: SponsorCode\_CountryCode\_SiteCode\_Date\_Time, where:

- SponsorCode the sponsor code, as set in Viedoc Admin, under Study Settings.
- CountryCode the code of the country selected in Viedoc Admin, under Site Settings.
- SiteCode the site code, as set in Viedoc Admin, under Study Settings.
- Date the date when the export was requested, in format *yyyymmdd*.
- Time the time (UTC) when the export was requested, in format hhmmss.

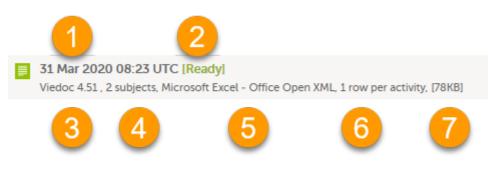
Notel If any of the characters that are invalid for a filename in Windows are used within any of the *SponsorCode* or *SiteCode*, these characters will be automatically replaced with - within the exported filename.

## 8.1 Latest exports

You can see a log of the requested exports in the **Latest exports** area, where you can download the exported files or delete the logs.

Notel The list of the latest exports is user-specific, that is, you can only see the exports made by yourself.

The latest five exports are shown in the list. To get the complete list of the initiated exports, click the **View all exports** link at the bottom of the list.

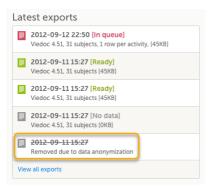


Each log entry provides the following information:

1. The date and time when the export was initiated.

- 2. The export status:
  - In Queue the export request is in queue, waiting to be processed.
  - In Progress the exported started and is in progress.
  - Ready the file was successfully exported and is ready for download.
  - Error an error was encountered and the export was not performed.
- 3. Viedoc output version see Output versions.
- 4. The number of exported subjects.
- 5. The format of the output file.
- 6. The selected layout, if applicable.
- 7. File size

Note! If data has been masked after an export was made, it is not possible to download that export because it could include the data that was later masked.



# 9 Exporting Data FAQ

The following are some frequently asked questions and answers about exporting data in Viedoc:

Q: How do I export the audit trail (history)?

A: Any PDF data export will include the audit trail (history) by default. You can also get an Excel or CSV version by changing the layout to one row per item and including the history. See the <u>Include history</u> section in the Excel Export lesson for more information.

Q: Is there a size limit to exports?

- A: No, there are no size limits to exports.
- Q: Can I schedule exports automatically?

A: Yes, you can configure customized automatic exports using Viedoc's web API. Please see the <u>Exporting data via</u> <u>Viedoc's web API</u> for more information.

Q: How is missing data handled?

A: Viedoc's approach to missing data is to leave it blank. The system does not use "N/A" or "missing." Both unconfirmed and confirmed missing data are included when <u>exporting queries and query history</u>.

Q: Why does the export seem stuck at a certain percent?

A. Sometimes exports (especially PDF exports of large studies) can take a take a longer time to complete and appear "stuck". If you log out, the export will continue in the background. Please do not make multiple requests for the same export. If the export fails with an error message, please contact Viedoc for assistance.



Excel export

# Excel export

Published by Viedoc System 2024-12-03

1. Introduction 2. File structure 2.1 Header rows 3. Data filtering - Type of data 4. Data grouping 4.2 Group data by form 4.3 Do not group data 5. Layout 5.4 One row per subject 5.5 One row per activity 5.6 One row per item 5.6.1 Include history 5.6.2 Checkboxes 5.6.3 Reference ranges 6. Form link items in the export output 6.7 One row per activity 6.8 One row per item 6.9 One row per subject 7. Recurring events in the export output 8. Repeating forms in the export output 9. Forms initiated by copying data from previous event

# 1 Introduction

Viedoc uses Microsoft Excel Open Extensible Markup Language (XML) format which is compatible with Excel version 2007 and later.

When selecting Microsoft Excel as **Output format** in the Data export page, you have different options for grouping data and for the layout, as described in the following sections.

For general information about data export in Viedoc, see Exporting data.

Note! Since the maximum number of rows supported for Excel is 1048576, in case data in a sheet exceeds this number, data will be split into multiple sheets.

# 2

## File structure

The Excel export contains the following sheets:

- README always the first sheet in the Excel export output, with general information about:
  - the Viedoc output version (for details see Exporting data)
  - the time zones used for date/time fields
  - the meaning of the signature, <u>only if the **Review status** was selected to be included in the export</u>
- Depending on the selected **Data grouping**:
  - If Group data by form is selected, there is one separate sheet for each form, as described below in Group data by form.
  - If Do not group data is selected, there is one sheet called Data that contains all exported data.
     See <u>Do not group data</u>.

- Items after the data sheet(s), there is the Items sheet, that lists all the existing items in the exported data with the following information (columns):
  - Note! This sheet is not included when selecting the one row per item layout.
    - ID the item ID, as set in the study design
    - Label the field label, as set in the study design
    - Data type the type of data, as set for the respective item in the study design. Can be one of the following:
      - integer
      - double
      - text
      - string
      - date
      - datetime
      - base64Binary (for File upload items)
    - Mandatory:
      - True if the item was set as mandatory in the study design
      - False if the item was not set as mandatory in the study design
    - Decimals the number of allowed decimals in the data content.
    - **Min Length** the minimum required length for the respective field, if set in Viedoc Designer. For checkbox items, this is the minimum number of checkboxes required to be set, a set in Viedoc Designer.
    - Max Length the maximum number of characters that can be entered, if set on item level in Viedoc Designer.
    - Format Name the format name, if set in Viedoc Designer (under *Outputs and Validation > Formats*). For the codes of the checkbox or radio button items, a default value is generated even if no format name is set in Viedoc Designer.
    - Content Length the maximum number of characters of the data content. That is, this is set by the length of the content
- CodeLists the last sheet in the export, containing all the code list items in the exported data with the following information:

Note! This sheet is not included when selecting the one row per item layout.

- Format Name
- Data Type
- Code Value
- Code Text

Notel If the Output IDs (OID) and Output labels have been defined in the study design, these are shown in the Excel/CSV/SAS export. If the Output IDs (OID) and Output labels are left undefined (blank) in the study design, then the configured Item ID and label is used. For more information about the item settings in the study design, see <u>Outputs and Validation</u>.

The table below lists which sheets are included in the Excel file, depending on the selected Grouping and Layout:

	Group data by form	Do not group data
one row per subject	<ul> <li>README</li> <li>one separate sheet for each form</li> <li>Items</li> <li>CodeLists</li> </ul>	<ul> <li>README</li> <li>Data</li> <li>Items</li> <li>CodeLists</li> </ul>
one row per activity	<ul> <li>README</li> <li>one separate sheet for each form</li> <li><i>Items</i></li> <li>CodeLists</li> </ul>	<ul> <li>README</li> <li>Data</li> <li>Items</li> <li>CodeLists</li> </ul>
one row per item	<ul><li><i>README</i></li><li>one separate sheet for each form</li></ul>	<ul><li>README</li><li>Data</li></ul>

## 2.1 Header rows

The headers are always represented by the first two rows in a sheet, as illustrated in the following image:

1. Human-readable format

2. Machine-readable format

Site sequence			Subject sequence		Event sequence			
number	Site name	Site code	number	Subject Id	number	Event Id	Event name	Event date
SiteSeq	SiteName	SiteCode	SubjectSeq	SubjectId	EventSeq	EventId	EventName	EventDate
1	Karolinska	01	1	SE-01-001	1	SCR	Add subject	2014-10-02
1	Karolinska	01	3	SE-01-003	1	SCR	Add subject	2014-11-14
1	Karolinska	01	4	SE-01-004	1	SCR	Add subject	2014-11-25
1	Karolinska	01	5	SE-01-005	1	SCR	Add subject	2014-12-05

An item that was changed within a new/revised study design version will have a "\_\_n" suffix added, where *n* is incremented for each study design version where the respective item was changed:

Race2		Race2	- Code
DMRACE	_2	DMRACE	_2CD
Native Ha	awaiian	4	
Native Ha	awaiian	4	
Black		1	

# 3 Data filtering - Type of data

Under Type of data, you can filter the data to be exported. If you filter data for Signed data, Not signed data, SDV performed or NA, or SDV pending, certain cells in the data sheets in the exported Excel file may appear empty. The data rows that contain empty cells due to the filtering are marked by an "X" in the last column of the data sheets that is named Empty cells on row may be due to export filter.

For example, let's say that we have an *Add Patient* event, and the *Date of Birth* is one of the data entered during this event. For a particular subject, this data was entered, signed by the Investigator, and afterwards modified, but not signed after the change. We perform an export that includes <u>only</u> the signed data, as illustrated in the image below:

Type of data Signed data SDV performed or NA SDV pendir	ng 🔊
Signed data	🕗 Not Signed data
SDV performed or NA	SDV pending

The value of the *Date of birth* field that was recently changed and not signed is not included in the export (the cell appears empty). The data row containing the empty cell is marked by a "X" the **Empty cells on row may be due to export filter**, as shown below:

	Site name	Site code				Event Id	Event name EventName	Event date	Activity Id ActivityId		Form sequence number		Gender	Gender - Code GENDERCD	Date of Birth	Age	Number Pl2	Empty cells on row may be due to export filter HAS FILTERED VALUES
	Stockholm			EH-D8-002		AP		2017-08-11	APA	Accivitying	1	-	Male	M	1966-10-01	51	112	
2		Uppsala:2		SE-Uppsala		AP		2017-08-11	APA		1	2.0	Female	F	1959-09-21	58		
2		Uppsala:2		SE-Uppsala		AP		2017-08-11	APA		1		Male	M	1977-03-15	40		
		Uppsala:2		SE-Uppsala		AP	Add Patien	2018-10-12	APA		1	14.2	Female	F	1965-02-22	54		
2		Uppsala:2		SE:Uppsala		AP	Add Patien	2018-11-12	APA		1	19.0	Male	м	1989-11-24	29		
2	Uppsala	Uppsala:2	19	SE:Uppsala	1	AP	Add Patien	2018-11-30	APA		1	20.2	Male	м	1954-02-10	65		
2	Uppsala	Uppsala:2	20	SE:Uppsala	1	АР	Add Patien	2018-11-30	APA		1	20.2	Female	F	1968-04-29	51		
2	Uppsala	Uppsala:2	24	SE:Uppsala	1	AP	Add Patien	2019-01-16	APA		1	20.2	Male	м		63		х

# 4 Data grouping

You can select whether the data should be grouped by form or not, from the **Data grouping** dropdown list.

## 4.1 Group data by form

When grouping the data by form, a separate sheet is created for each form. The sheet name is the Form ID, as set in the study design (in Viedoc Designer).

In each form sheet, the first columns (to the left) are the same for all the forms and provide information about the site, subject, event, activity and design version:

Column	Description
Site Sequence number	Counter that identifies the site globally within the study.
Site name	The site name, as set in Viedoc Admin.
Site code	The site code, as set in Viedoc Admin.
Subject sequence number	Counter that identifies the subject within the site.
Subject Id	The Subject ID, in the format configured in Viedoc Designer. The Subject ID is the subject identifier displayed in Viedoc Clinic on the subject card, subject details page, and so on.
Event sequence number	Counter that identifies the event within the sequence of events for the same subject.
Event Id	The event ID, as set in the study design (in Viedoc Designer).
Event name	The event name, as set in the study design (in Viedoc Designer) and displayed in Viedoc Clinic.
Event date	The event date, as set in Viedoc Clinic when the event is initiated.
Activity Id	The activity ID, as set in the study design (in Viedoc Designer).
Activity name	The activity name, as set in the study design (in Viedoc Designer) and displayed in Viedoc Clinic.
Form sequence number	Counter that identifies the instance of the respective form within the respective activity. This is mostly used for repeating forms.
	For non-repeating forms, this is "1". If a form is reset and then saved again the new form has sequence number "2", and so on.
	Form sequence number increases one step every time reset/initiate occurs.
Subject form sequence number	Counter that uniquely identifies the instance of a specific form on a subject level, that is, it starts with 1 and it is incremented each time a new instance of the form is created for that subject.
Origin Subject form sequence number	For a copied form instance, it identifies the form instance from which data was copied for the first time. For the first instance of the form (that is, not copied) it gets the value of the SubjectFormSeqNo .
Source Subject form sequence number	For a copied form instance, a counter that identifies the source of a copied form instance (the form instance the data was copied from). It gets the value of the SubjectFormSeqNo from which the form instance was copied. For the first instance of the form (not copied) it is empty (null).
Design version	The design version used at the time of data edit for the respective form.

The example in the image below shows an export with the default settings for the Layout, that is, 1 row per activity.

The following columns are specific to each form, one column for each item in the respective form. Each column has the *<ltem name*>, as set in the study design (in Viedoc Designer) as column header.

## 4.2 Do not group data

If you choose not to group the data, then all data from all forms will be exported in the same sheet (Data) of the output file.

The example in the image below shows an export with the default settings for the Layout, that is, 1 row per activity.

In the **Data** sheet, the first columns (to the left, marked in green) are the common for all the forms and provide information about the site, subject, event and activity.

The following columns (to the right, marked in orange) contain form-specific information for all the forms within the event. For each of the forms, the following columns are added:

- <FormName>\_Design Version the form name, as set in the study design (in Viedoc Designer) and displayed in Clinic. In the example in the image, the form name is Demographics.
- <FormName>(<Form Repeat Key>)\_<ItemName> for each item in the respective form. The form name
  and item name, as set in the study design (in Viedoc Designer) and displayed in Clinic. The Form Repeat
  Key identifies the instance of the form (for repeating forms). For non-repeating forms, the Form Repeat
  Key is always 1.

A	в	С	D	E	F	G	н	1	J	K	L	M	N	0	P	Q	R	S	т	U	V	w
Site	Site name	Site code	Subject	Subject Id	Event	Event Id	Event	Event date	Activity Id	Activity	Demograp	Demographics(1	Demograp	Demograp	Demographics(1	Demograp	Demograp	Demograp	Demograp	Demograp	Demograp	Demo
sequence			sequence		sequence		name			name	hics-	)-Date/Time of	hics(1)-	hics(1)-	)-Date/Time of	hics(1)-	hics(1)-	hics(1)-	hics(1)-	hics(1)-	hics(1)-	hics(1)
number			number		number						Design	Informed	Gender	Gender -	Birth	Age	CHB	CHB	Reason	Reason	Race	Race -
											version	Consent		Code			Result	Result -	for No	for No		Code
																		Code		CHB -		
SiteSeq	SiteName			SubjectId			EventName	EventDate	ActivityId	ActivityNa	DesignVer	1.DMIC		1.DMSEXCI	1.DMDOB	1.DMAGE	1.DMCBP	1.DMCBPC	1.DMCBPR	1.DMCBPR	1.DMRACE	. 1.DMR
1	Academic H	AHU	1	SE-AHU-00	ŭ 🕇 👘	SCR	Add subject	2016-10-04	SCR	Add subje	c 3.0	2016-07-04	Male	1	1964-06-11	52.1 🔶					White	5
1	Academic H	AHU	1	SE-AHU-00	1	V1	Visit 1	2016-10-04	V1													
1	Academic H	AHU	2	SE-AHU-00	1	SCR	Add subject	2016-10-04	SCR	Add subje	c 3.0	2016-10-02	Female	2	1979-05-28	37.3	Yes	1			Asian	3
1	Academic H	AHU	2	SE-AHU-00	11	V1	Visit 1	2016-10-04	V1													
1	Academic H	AHU	3	SE-AHU-00	1	SCR	Add subject	2016-10-04	SCR	Add subje	c 3.0	2016-09-04	Male	1	1968-08-04	48.1					White	5
1	Academic H	AHU	3	SE-AHU-00	1	V1	Visit 1	2016-10-02	V1													
1	Academic H	AHU	4	SE-AHU-00	N1	SCR	Add subjec	2016-10-04	SCR	Add subje	c 3.0	2016-06-05	Male	1	1952-10-01	63.7					Black	1
1	Academic H	AHU	5	SE-AHU-00	1	SCR	Add subject	2016-10-04	SCR	Add subje	c 3.0	2016-08-07	Female	2	1959-04-06	57.3	No	0	Postmenop	1	White	5
1 1	Academic H	AHU	5	SE-AHU-00	1	V1	Visit 1	2016-10-02	V1													
2 4	Charite Uni	CUB	1	DE-CUB-00	1	SCR	Add subjec	2016-10-04	SCR	Add subje	c 3.0	2016-08-07	Male	1	1980-02-22	36.5					White	5
3 4	Charite Uni	CUB	1	DE-CUB-00	1	V1	Visit 1	2016-10-02	V1													
1 4	Charite Uni	CUB	2	DE-CUB-00	1	SCR	Add subjec	2016-10-04	SCR	Add subje	c 3.0	2016-03-02	Male	1	1960-11-02	55.3					White	5
5 4	Charite Uni	CUB	2	DE-CUB-00	1	V1	Visit 1	2016-10-04	V1													
- K-	201244-01-0		K	AU 1014 00		000		0010 10 04	000	مصادرة فالمراجع		2010 10 02	******	κ.	4004-07-04	ee 0					and the second	<b>7</b>
	README	Data	Items	CodeLists	Ð								E 4									Þ
			st	andard in	♦ fo for all	forms									fo	rm specif	ic info (ite	ems)				

5 Layout

In the Layout section, you can select whether the data should be organized in the output file as:

- one row per subject
- <u>one row per activity</u> (default)
- <u>one row per item</u>

Output to: Mice	rosoft Excel - Office Open XML	T	
Data grouping:	Group data by form <b>*</b>		
Layout	1 row per subject	• 1 row per activity	1 row per item
Output version:	Viedoc 4.39	·	

## 5.1 One row per subject

The output in this case will look as shown in the below image. The example shows an export performed with all the default settings except for the **Layout** which is set to **1 row per subject**.

	В	С	D	E		F	G	н	1.1	J	К	L	м	N	0	Р	Q
															Add		
													Add	Add	subject(1)		
						Add			Add			Add	subject(1)	- subject(1)-	Add		Add
						subject(1)-	Add subject(1)-	Add	subject(1)-		Add	subject(1)	- Add	Add	subject-	Add	subject(1)
						Add	Add subject-	subject(1)-	Add	Add subject(1)-	subject(1)	Add	subject-	subject-	(1)Reason	subject(1)-	Add
			Subject			subject-	(1)Date/Time of	Add	subject-	Add subject-	Add	subject-	(1)CHB	(1)Reason	for No	Add	subject-
			sequence			Design	Informed	subject-	(1)Gender	(1)Date/Time of	subject-	(1)CHB	Result -	for No	CHB -	subject-	(1)Race -
	Site name			Subject Id		version	Consent	(1)Gender		Birth	(1)Age	Result	Code		Code	(1)Race	Code
2	SiteName	SiteCode	SubjectSec	SubjectId					SCR[1].SCR	SCR[1].SCR[1].D	SCR[1].SCF	SCR[1].SCF	R SCR[1].SCF	SCR[1].SCR	SCR[1].SCF		SCR[1].SCR
3	Academic	FAHU	1	SE-AHU-001		3.0	2016-07-04	Male	1	1964-06-11	52.1		_			White	5
4	Academic	FAHU	2	SE-AHU-002		3.0	2016-10-02	Female	2	1979-05-28	37.3	Yes	1			Asian	3
5	Academic	FAHU	3	SE-AHU-003		3.0	2016-09-04	Male	1	1968-08-04	48.1					White	5
6	Academic	FAHU	4	SE-AHU-004		3.0	2016-06-05	Male	1	1952-10-01	63.7				_	Black	1
7	Academic	FAHU	5	SE-AHU-005		3.0	2016-08-07	Female	2	1959-04-06	57.3	No	0	Postmenop	1	White	5
8	Charite Un	CUB	1	DE-CUB-001		3.0	2016-08-07	Male	1	1980-02-22	36.5					White	5
	Charite Un		2	DE-CUB-002		3.0	2016-03-02	Male	1	1960-11-02	55.3					White	5
10	VU Medica	a VUA	1	NL-VUA-001		3.0	2016-10-02	Male	1	1961-07-31	55.2					White	5
11	VU Medica	AUV A	2	NL-VUA-002		3.0	2016-08-07	Male	1	1973-12-21	42.6		_			White	5
12	Academic	FAHU	6	SE-AHU-006		12.0	2016-10-02	Female	2	1976-02-01	40.7	Yes	1			White	5
	<	README	DM	SS VS RAND	CQ PE	EC BM	LB IE S	тат сс	LAB N	ИН   НА   С.	. + :	•					-
									1								
			Form Standard info for all forms					Form st	pecific inf	o (items)							

There is one sheet for each form, as the default setting is to Group data by form.

There is one row per subject, that is, one row for each SubjectID (that uniquely identifies the subject).

The first columns provide information on the site and subject:

Column	Description
Site name	The site name, as set in Viedoc Admin.
Site code	The site code, as set in Viedoc Admin.
Subject sequence number	Counter that identifies the subject within the site.
Subject Id	The Subject ID, in the format configured in Viedoc Designer. The Subject ID is the subject identifier displayed in Viedoc Clinic on the subject card, subject details page, and so on.

The following columns are the item-specific values, one set as described below for each item in the exported data. The order of the items is by event, as set in the study workflow.

In case Do not group data is selected under Data grouping (see <u>Do not group data</u>):

<Event name>(<Event Repeat Key>) - <Activity name> <Form name> <Item name> <Code list value>, where:

- Event name> the event name, as set in the study design and displayed in Clinic.
- <Event Repeat Key> the event repeat key, applicable <u>only for the unscheduled/common</u> events.
- <Activity name> the activity name, as set in the study design
- Form name> the form name, as set in the study design and displayed in Clinic.
- Item name> the item label, as set in the study design and displayed in Clinic.
- <Code list value> applicable only for the checkbox items. This is the code list value set in Viedoc Designer for each choice of the respective checkbox item
- In case Group data by form was selected under *Data grouping* (see <u>Group data by form</u>), the columns
  are named similar as for the not grouped data above, without the <*Form name*>, as the form is identified
  by the sheet name.

Note! The columns Event sequence number, Event Id, Activity Id, Form sequence number, Subject form sequence number, Origin Subject form sequence number, and Source Subject form sequence number are <u>not</u> included when you have selected **1 row per subject**.

## 5.2 One row per activity

The output in this case will look as shown in the below image. The example shows an export performed with all the default settings except for the **Layout** which is set to **1 row per activity**.

There is one sheet for each form, as the default setting is to Group data by form.

The data is grouped so that, for each subject (1), there is one row for each activity (2).

	А	В	С	D	E	F	G	Н	l. I	J	К	L	М	N	0
														Physical	Physical
														Examinati	Examinati
S	ite			Subject		Event						Form		on	on
s	equence			sequence		sequence		Event			Activity	sequence	Design	performe	performe
1 n	umber	Site name	Site code	number	Subject Id	number	Event Id	name	Event date	Activity Id	name	number	version	d	d - Code
2 S	iteSeq	SiteName	SiteCode	SubjectSec	SubjectId	EventSeq	EventId	EventNam	EventDate	ActivityId	ActivityNa	FormSeq	DesignVer	PEYN	PEYNCD
3 1		Academic H	AHU	11	SE-AHU-011	1	V1	Visit 1	2017-10-20	V1		1	32.0	Yes	1
4 1		Academic H	AHU	14	SE-AHU-014	1	V1	Visit 1	2017-11-10	V1		1	33.0	No	0
5 1		Academic H	AHU	14	SE-AHU-014	1	UNS_1	Unschedul	2017-11-13	UNS_1		1	34.0	Yes	1
6 1		Academic H	AHU	18	SE-AHU-018	1	V1	Visit 1	2017-11-14	V1		1	36.0	Yes	1
7 1		Academic H	AHU	22	SE-AHU-022	1	V1	Visit 1	2017-11-14	V1		1	39.0	Yes	1
8 1		Academic H	AHU	23	SE-AHU-023	1	V1	Visit 1	2017-10-16	V1		1	27.0	Yes	1
9 1		Academic H	AHU	23	SE-AHU-023	1	V3	Visit 3	2017-10-27	V4		1	33.0	Yes	1
10		Academic H	AHU	24	SE-AHU-024	1	V1	Visit 1	2017-11-01	V1		1	33.0	Yes	1
11		Academic H	AHU	24	SE-AHU-024	1	V3	Visit 3	2017-11-14	V4 🧹		1	39.0	Yes	1
2 1		Academic H	AHU	32	SE-AHU-032	1	V1	Visit 1	2017-11-21	V1		1	44.0	Yes	1
.3 1		Academic H	AHU	34	SE-AHU-034	1	V1	Visit 1	2017-11-21	V1		1	46.0	Yes	1
4 1		Academic H	AHU	36	SE-AHU-036	1	V1	Visit 1	2017-11-20	V1		1	44.0	Yes	1
5 1		Academic H	AHU	43	SE-AHU-043	1	V1	Visit 1	2018-01-01	V1		1	51.0	Yes	1
16		Academic H	AHU	44	SE-AHU-044	1	V1	Visit 1	2018-01-02	V1		1	51.0	Yes	1
7 1		Academic H	AHU	50	SE-AHU-050	1	V1	Visit 1	2018-01-06	V1		1	55.0	Yes	1
8 1		Academic H	AHU	73	SE-AHU-073	1	V1	Visit 1	2018-03-20	V1		1	57.0	Yes	1
19		Academic H	AHU	75	SE-AHU-075	1	V1	Visit 1	2018-08-13	V1		1	59.0	Yes	1
	•	README		SS VS	RAND CQ PE	EC BN		IE STAT	(+) : (4			-	55.0		165

## 5.3 One row per item

The output in this case will look as shown in the below image. The example shows an export performed with all the default settings except for the **Layout** which is set to **1 row per item**.

There is one sheet for each form, as the default setting is to Group data by form.

The data is grouped so that there is one row for each item (3) within an activity (2) for a subject (1).

	E	F	G	Н	1	J	К	L	M	N	0	Р	Q	R
1	Subject Id	Event sequen	Event Id	Event name	Event date	Activity Id	Activity name	Form Id	Form name	Form sequence number	Item group Id	Item group sequ	Item Id	Item export label
2	SubjectId	EventSeq	EventId	EventName	EventDate	ActivityId	ActivityName	FormId	FormName	FormSeq	ItemGroupId	ItemGroupSeq	ItemId	ItemExportLabel
3	SE-AHU-011	1	V1	Visit 1	2017-10-20	V1		PE	Physical Examination	1	IG_10217_1	1	PEYN	Physical Examination performed
4	SE-AHU-011	1	V1	Visit 1	2017-10-20	V1		PE	Physical Examination	1	IG_10217_1	1	PEDT	Date/Time of Examination
5	SE-AHU-011	1	V1	Visit 1	2017-10-20	V1		PE	Physical Examination	1	PEG2	1	PEHERES	HEENT - result
6	SE-AHU-011	1	V1	Visit 1	2017-10-20	V1		PE	Physical Examination	1	PEG3	1	PESKRES	Skin - result
7	SE-AHU-011	1	V1	Visit 1	2017-10-20	V1	-	PE	Physical Examination	1	PEG4	1	PETHRES	Thyroid - result
8	SE-AHU-011	11)	V1	Visit 1	2017-10-20	V1	2)	PE	Physical Examination	1	PEG5	1 (3)	PENERES	Neurological - result
9	SE-AHU-011	1	V1	Visit 1	2017-10-20	V1	-	PE	Physical Examination	1	PEG6	1	PERERES	Respiratory - result
10	SE-AHU-011	1	V1	Visit 1	2017-10-20	V1		PE	Physical Examination	1	PEG7	1	PECARES	Cardiovascular - result
11	SE-AHU-011	1	V1	Visit 1	2017-10-20	V1		PE	Physical Examination	1	PEG8	1	PEABRES	Abdomen - result
12	SE-AHU-011	1	V1	Visit 1	2017-10-20	V1		PE	Physical Examination	1	PEG9	1	PELYRES	Lymph nodes - result
13	SE-AHU-011	1	V1	Visit 1	2017-10-20	V1		PE	Physical Examination	1	PEG10	1	PEEXRES	Extremities - result
14	SE-AHU-011	1	V1	Visit 1	2017-10-20	V1		PE	Physical Examination	1	PEG11	1	PEOTHRES	Other - result
15	SE-AHU-014	1	V1	Visit 1	2017-11-10	V1		PE	Physical Examination	1	IG_10217_1	1	PEYN	Physical Examination performed
16	SE-AHU-014	1	V1	Visit 1	2017-11-10	V1		PE	Physical Examination	1	IG_10217_1	1	PENDREA	Examination not performed rease
17	SE-AHU-014	1	UNS_1	Unscheduled	2017-11-13	UNS_1		PE	Physical Examination	1	IG_10217_1	1	PEYN	Physical Examination performed
18	SE-AHU-014	1	UNS_1	Unscheduled	2017-11-13	UNS_1		PE	Physical Examination	1	IG 10217_1	1	PEDT	Date/Time of Examination
19	SE-AHU-014	1	UNS_1	Unscheduled	2017-11-13	UNS_1		PE	Physical Examination	1	PEG2	1	PEHERES	HEENT - result
20	SE-AHU-014	1	UNS 1	Unscheduled	2017-11-13	UNS 1		PE	Physical Examination	1	PEG3	1	PESKRES	Skin - result
21	SE-AHU-014	1	UNS 1	Unscheduled	2017-11-13	UNS 1		PE	Physical Examination	1	PEG4	1	PETHRES	Thyroid - result
22	SE-AHU-014	1	UNS 1	Unscheduled	2017-11-13	UNS 1		PE	Physical Examination	1	PEG5	1	PENERES	Neurological - result
23	SE-AHU-014	5	UNS 1	Unscheduled	2017-11-13	UNS 1		PF	Physical Examination	1	PEG6	5	PERERES	Resniratory - result
	< >	RAND SS	DM	VS   LB   EC	co P	E BM	IE STAT	LAB CC	MH ExampleFor	n (+) 🗄 🖣				Þ

The data is sorted by: site, subject, event date, event repeat key, form repeat key, form ID, item group ID, item ID. If the **Include history** option is selected (see following section), the data is ordered from the oldest to the current item data (that is, by the **Edit sequence number**).

### 5.3.1 Include history

When selecting **1** row per item, the option to **Include history** becomes available. If selected, the edit history information (audit trail) will be included in the exported output (that is, the information shown in Viedoc Clinic on form level when selecting **Show history**).

The following information (columns) is added for each entry in the output file:

- Edit sequence number a counter for each change per item.
  - Edit reason reason for change (initial or given reason at data edit). The edit reasons are the following:

    Initial data entry
    - Function execution
    - Transcription error
    - Confirmed as missing!
    - Automatically updated due to dependency change
    - Removed due to data dependency
    - Revision applied
    - Query resolution
    - Form reset: Transcription error
    - Form reset: Query resolution
    - Import
    - Other (the text the user enters as the reason)

- Edit by the user who performed the changes (user name and user id in parentheses).
- Edit date/time (UTC) edit date/time (Coordinated Universal Time (UTC)).

The items belonging to a reset or deleted form/event/subject are included as well in the export, together with a full history that gives the reason for resetting or deleting the form/event/subject.

#### 5.3.2 Checkboxes

Checkbox items are output as one row per code list item. All code list items are listed, regardless if they contain data or not. Each row is labeled, in the **Item Id** column, with the item Object Identifier (OID) and an 1-based index, as illustrated in the following image:

					li li	tem OID	inde	X	
Activity name	Form Id	Form name	Form sequence number	Item group Id	Item group sequen	Item Id		Item export label	Edit sequence
ActivityName	FormId	FormName	FormSeq	ItemGroupId	ItemGroupSeq	ItemId 🝦	÷	ItemExportLabel	EditSeqNo
Eligibility	IE	Eligibility	1	IEG10	1	checkboxes	1	Check boxes - 1	1
Eligibility	IE	Eligibility	1	IEG10	1	checkboxes	2	Check boxes - 2	1
Eligibility	IE	Eligibility	1	IEG10	1	checkboxes	3	Check boxes - 3	1
Eligibility	IE	Eligibility	1	IEG10	1	checkboxes	4	Check boxes - 4	1
Eligibility	IE	Eligibility	1	IEG10	1	checkboxes	5	Check boxes - 5	1
Eligibility	IE	Eligibility	1	IEG10	1	checkboxes	6	Check boxes - 6	1
Eligibility	IE	Eligibility	1	IEG10	1	checkboxes	1	Check boxes - 1	2
Eligibility	IE	Eligibility	1	IEG10	1	checkboxes	2	Check boxes - 2	2
Eligibility	IE	Eligibility	1	IEG10	1	checkboxes	3	Check boxes - 3	2
Eligibility	IE	Eligibility	1	IEG10	1	checkboxes	4	Check boxes - 4	2

If the option to **Include history** is selected, then the code list items are ordered by the time of data entry (that is, by the **Edit sequence number**).

Checkbox items generate two columns per code of the item, one for the code and another one for the code description.

The items that have a code list assigned are output to an additional row with the ID suffixed with "CD", for the code.

#### 5.3.3 Reference ranges

When reference ranges are used for a laboratory form, The laboratory name and the laboratory code are included and the following two columns are added:

SCOPE\_XXX and SCOPE\_XXXCD (where XXX is the numeric value)

## 6 Form link items in the export output

Form link items can be organized in the Output format as:

- One row per activity (default)
- One row per item
- One row per subject

### 6.1 One row per activity

Selecting **1 row per activity** generates the output as shown in the image below. The exported file contains two columns <u>per linked form instance</u>, the Data column and the Identifier column, (the header is labelled Identifier).

In the example below:

- Each linked form instance shows its display value (as displayed in Clinic) and the Identifier.
- The medication Paracetamol in this example is linked to two different entries in the Adverse Event log.
- The format for the identifier: EventId-EventSeq-ActivtyId-FormId-FormSeq.

	Reason for		Adverse event link 1 -		Adverse event link 2 -
Name of drug / medication / therapy	administration	Adverse event link 1	Identifier	Adverse event link 2	Identifier
CMTRT	CMINDC	CM31	CM31CD	CM32	CM32CD
Paracetamol	Adverse event	1 - Headache - 14 Mar 2022	COMMON_AE-1-LOG_AE-AE-1	2 - Migraine - 13 Mar 2022	COMMON_AE-2-LOG_AE-AE-1

There are also two header rows in the output:

Header rows, one row per activity	
Row 1: Data column	Item Label, Counter of the selected link starting at one
Row 1: Identifier column	Item Label, Counter of the selected link starting at one, Identifier
Row 2: Data column	Item ID, Counter of the selected link starting at one
Row 2: Identifier column	Item ID, Counter of the selected link starting at one, ID

## 6.2 One row per item

Selecting **1 row per item** generates the output as shown in the image below. The exported file contains two additional columns with the headers Item value and Item code, and <u>one row per linked form instance</u>.

Item value	Item code
ItemValue	ItemCode
3	
Alvedon	
Adverse event	2
16 Dec 2021 - Headache	COMMON_AE-1-LOG_AE-AE-1
250	
Milligram	2
Capsule	2
Twice daily	2
Oral	1
2021-12-16	
01:20	
No	Ó
2021-12-16	
01:25	
4	
Alvedon	
Adverse event	2
16 Dec 2021 - Headache	COMMON_AE-1-LOG_AE-AE-1
500	
Milligram	2
Tablet	1
Once daily	1
Oral	1
2021-12-16	
09:00	
No	Ó
2021-12-16	
End time not available	99

Note! In the export preview the form identifier column is excluded by default. The order the form link item was added (time of data entry) is followed in the export.

## 6.3 One row per subject

Selecting **1 row per subject** generates the output as shown in the image below. The exported file adds two columns <u>per linked form instance</u> to the exported file, the Data column and the Identifier column:

Prior and Concomitant Medications(1)-	Prior and Concomitant Medications(1)-
(1)Medical history link(s) 1	(1)Medical history link(s) 1 - Identifier
COMMON_CM[1].LOG_CM[1].CM41	COMMON_CM[1].LOG_CM[1].CM41ID
Headache - 07 Jan 2022	COMMON_MH-1-LOG_MH-MH-1

There are also two header rows in the output:

7

Header rows, one row per subject	
Row 1: Data column	Event Label (event counter), Activity label (activity counter), Item label (counter of the selected link.)
Row 1: Identifier column	Event Label (event counter), Activity label (activity counter), Item label (counter of the selected link), Identifier
Row 2: Data column	Event ID (event counter), Activity ID (activity counter), Item ID (counter of the selected link.)
Row 2: Identifier column	Event ID (event counter), Activity ID (activity counter), Item ID, (counter of the selected link), ID

## Recurring events in the export output

Recurring events are identified in the export output by the StudyEventRepeatKey .

The image illustrates the form *Vital Signs* in the Excel export output. The form is used in three events (Visit 1, Visit 2 and Visit 3), of which Visit 3 is a recurring event. The four instances of Visit 3 are identified by the StudyEventRepeatKey that is listed in the **Event sequence number (EventSeq)** column:

A	B	С	D	E	F	G	н	1	J	K	L	M	N	0	P	Q	R	S	т	U	
								1													
Site			Subject		Event						Form			Vital Signs		Not		Body			
sequence			sequence		sequence						sequence		Vital Signs	done? -		measured		temperat	Systolic	Diastolic	
number	Site name	Site code	number	Subject Id	number	Event Id	Event name	Event date	Activity Id	Activity name	number	Design version	done?	Code	Date/Time	reason	Heart rate	ure	BP	BP	
SiteSeq	SiteName	SiteCode	SubjectSeq	SubjectId	EventSeq	EventId	EventName	EventDate	ActivityId	ActivityName	FormSeq	DesignVersion	VS_YN	VS_YNCD	VS_DATE	VS_NDrea	VS_HR	VS_TEMP	VS_SYS	VS_DIA	
1	Academic Hospital Uppsala	AHU	48	SE-AHU-048	1	V1	Visit 1	2018-01-01	V1		1	55.0	Yes	1	2018-01-01 00:00		61	37.0	120	65	
	Academic Hospital Uppsala	AHU	48	SE-AHU-048	1	V2	Visit 2	2018-01-05	V2		1	55.0	Yes	1	2018-01-05 00:00			37.1	125	70	
1	Academic Hospital Uppsala	AHU	48	SE-AHU-048		V3	Visit 3	2018-01-06	ACT_2		1	55.0	Yes	1	2018-01-06 00:00			37.2	130	65	
1	Academic Hospital Uppsala	AHU	48	SE-AHU-048	2	V3	Visit 3	2018-01-07	ACT_2		1	55.0	Yes	1	2018-01-07 00:00			37.4	125	70	
1	Academic Hospital Uppsala	AHU	48	SE-AHU-048	3	V3	Visit 3	2018-01-08	ACT_2		1	55.0	Yes	1	2018-01-08 00:00			37.5	125	75	
1	Academic Hospital Uppsala	AHU	48	SE-AHU-048	4	V3	Visit 3	2018-01-09	ACT_2		1	55.0	Yes	1	2018-01-09 00:00		66	37.6	125	70	
								1													
	in the second	mark MA.				de de					-									A 10	dia.
	and the second							ines.							- Carter Brown						
		_																			
	README DM SS V	s co	PE EC E	M LB IE	STAT	RAND	CC LAB	MH HA C	MAE	Items CodeLi	- L - O										

Note! Support for recurring events has been added in Viedoc release 4.39. That means that if you would like to export recurring events, you should select Viedoc version 4.39 or later in the **Output version** dropdown menu under **Output format**.

# 8 Repeating forms in the export output

Repeating forms are identified in the export output by the  ${\tt FormRepeatKey}$  .

The image illustrates the repeating form *Lab* in the export to Excel. The instances of the form are identified by the FormRepeatKey that is listed in the Form sequence number (FormSeq) column:

1	λ	В	С	D	E	F	G	Н	1	J	K	L	M	N	0	Р	Q	R	
Site				Subject		Event						Form							
seque	ence			sequence		sequence						sequence		Collection Date and		Low	High		
1 numb	er	Site name	Site code	number	Subject Id	number	Event Id	Event name	Event date	Activity Id	Activity name	number	Design version	Time	Result	Normal	Normal		
2 SiteS	eq	SiteName	SiteCode	SubjectSeq	SubjectId	EventSeq	EventId	EventName	EventDate	ActivityId	ActivityName	FormSeq	DesignVersion	LAB_DATE	LAB_WBC	LAB_WBC	LAB_WBC	LAB_NEUT	LAB
3 1		Academic Hospital Uppsala	AHU	44	SE-AHU-044	1	V2	Visit 2	2018-01-08	V2		1	51.0	2018-01-08 00:00	4589	4000	8000	1235	110
4 1		Academic Hospital Uppsala	AHU	44	SE-AHU-044	1	V2	Visit 2	2018-01-08	V2		2	51.0	2018-01-09 13:26	6987	5500	11000	3569	120
5 1		Academic Hospital Uppsala	AHU	44	SE-AHU-044	1	V2	Visit 2	2018-01-08	V2		3	51.0	2018-01-08 00:00	5877	5500	11000	1658	1200
6		and a summer of	in the	the second		-		and the second		-		- A	~~	and defines and an advertise of a second second			and a		
42 43												1919 - A.							
		README IE CQ V	S   EC	STAT   MH	LAB Iter	ms Code	Lists					-		•					

Note! Support for repeating forms has been added in Viedoc release 4.39. That means that if you would like to export repeating forms, you should select Viedoc version 4.39 or later in the **Output version** dropdown menu under **Output format**.

## Forms initiated by copying data from previous event

The following form sequence numbers are used to make it easier to track different form instances at subject level, which are useful especially for the form instances initiated by copying the data from previous event.

- FormRepeatKey Counter that identifies the specific instance of a repeating form within a specific activity. This is available in the export output for Viedoc output version 4.39 and onwards.
- SubjectFormSeqNo Counter that uniquely identifies the instance of a specific form on a subject level, that is, it starts with 1 and it is incremented each time a new instance of the form is created for that subject. This is available in the export output for Viedoc output version 4.51 and onwards.
- OriginSubjectFormSeqNo For a copied form instance, it identifies the form instance from which data
  was copied for the first time. For the first instance of the form (that is, not copied) it gets the value of the
  SubjectFormSeqNo. This is available in the export output for Viedoc output version 4.51 and onwards.
- SourceSubjectFormSeqNo For a copied form instance, a counter that identifies the source of a copied form instance (the form instance the data was copied from). It gets the value of the SubjectFormSeqNo from which the form instance was copied. For the first instance of the form (that is, not copied) it is empty, that is, null. This is available in the export output for Viedoc output version 4.51 and onwards.

The example below illustrates how the values for these sequence numbers are assigned. The demo form used is set as repeatable and copyable and is included in Visit 1, Visit 2 and Visit 3.

We perform the following actions in Viedoc Clinic:

9

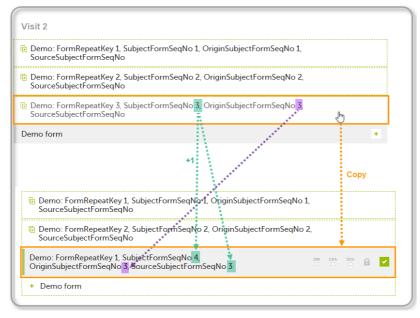
1 Initiate Visit 1 and fill-in three instances of the Demo form, these instances will get the sequence numbers as illustrated below:

Visit 1					
Demo: FormRepeatKey 1, SubjectFormSeqNo 1, OriginSubjectFormSeqNo 1, SourceSubjectFormSeqNo	DM	CRA	SDV		<b>~</b>
Demo: FormRepeatKey 2, SubjectFormSeqNo 2, OriginSubjectFormSeqNo 2, SourceSubjectFormSeqNo	DM	CRA	SDV		
Demo: FormRepeatKey 3, SubjectFormSeqNo 3, OriginSubjectFormSeqNo 3, SourceSubjectFormSeqNo	DM	CRA	SDV	6	
+ Demo form					

2 Initiate Visit 2. Demo form will be available to be initiated by copying data from one of the previously filled-in form instances within Visit 1, so all the three instances will be shown as ghost forms:

Visit 2	
Demo: FormRepeatKey 1, SubjectFormSeqNo 1, OriginSubjectFormSeqNo 1, SourceSubjectFormSeqNo	
Demo: FormRepeatKey 2, SubjectFormSeqNo 2, OriginSubjectFormSeqNo 2, SourceSubjectFormSeqNo	
Demo: FormRepeatKey 3, SubjectFormSeqNo 3, OriginSubjectFormSeqNo 3, SourceSubjectFormSeqNo	
Demo form	+

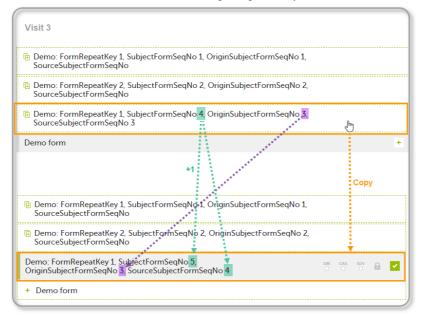
Create an instance of Demo form within Visit 2 by copying the data from the third instance of the form filled in within Visit 1. This will result in the new form instance getting the sequence numbers as illustrated below:



Initiate Visit 3. Demo form will be available to be initiated by copying data from one of the previously filled-in form instances within Visit 1 and Visit 2, as below:



5 Create an instance of Demo form within Visit 3 by copying the data from the form filled in within Visit 2. This will result in the new form instance getting the sequence numbers as illustrated below:



These sequence numbers are available to be used within expressions only to get the value of the sequence number for a specific form instance, that is, by using {SubjectFormSeqNo}, {OriginFormSeqNo}, {SourceFormSeqNo}.

In the above example, the form Summary format was configured by using these sequence numbers as below:

Form Repeat Key {FormRepeatKey}, SubjectFormSeqNo {SubjectFormSeqNo}, OriginFormSeqNo {OriginFormSeqNo}, SourceFormSeqNo {SourceFormSeqNo}

4

- Only the FormRepeatKey is used to identify a specific instance of the form in data mapping for data import, as well as in the item identifier used in JavaScript (for example *EventID.FormID*\$ActivityID[FormRepeatKey].ItemID).
- When resetting a form, the sequence numbers are still allocated to it, and the next available ones are used for the new instances.

In the excel export output, these form sequence numbers allows to track, for the form instances that were initiated by copying data from previous events, where the data originates from, as below:

		Origin	Source	
	Subject	Subject	Subject	
Form	form	form	form	
sequence	sequence	sequence	sequence	Design
number	number	number	number	version
FormSeq	SubjectFor	OriginSubj	SourceSubj	DesignVers
1	1	1		2.1
2	2	2		2.1
3	3	3		2.1
1	4	3	> 3	2.1
1	5	3	►4	2.1

Analyzing the values of the form sequence numbers, only the form instances that were initiated by copying the data from previous visits have values populated in the *Source Subject form sequence number* column, that is, the last two rows in the example. The data was copied from the form instance having the same *Subject form sequence number* value, highlighted in green in the above image. The form instance that the data was copied for the first time is identified by the value of the *Origin Subject form sequence number*, that is, "3" in our example.



PDF export output

## PDF export output

Published by Viedoc System 2022-02-10

 1. Introduction

 2. Output file(s)

 3. PDF file structure/content

 3.1 First page

 3.2 Site summary page

 3.3 Subject summary page

 3.4 Event summary page

 3.4.1 The sort order of the forms

## 1 Introduction

When choosing PDF as output format, you have the following options:

- Exclude deleted subjects / events / forms if checked, the deleted subjects, events and forms will be
  excluded from the PDF export.
- Create PDF/A compliant archive if checked, the PDF export output will be in a Portable Document Format Archive (PDF/A) compliant format. The PDF/A is a standardized format specialized for long-term preservation of electronic documents.
- Embed complete fonts (no subsets) if checked, this will force embedding the complete fonts (not only subsets) into an archive and all the font subsets embedded in the PDF file will be replaced with fully embedded fonts.

Note! Please note that this will lead to significantly larger file sizes.

- FDA submission format (eCTD) if checked, the PDF export output will be structured according to the
  electronic Common Technical Document (eCTD) format specified by the Food and Drug Administration
  (FDA). The eCTD format provides a structure where the Case Report Forms (CRFs) are listed twice,
  ordered by event/workflow and ordered by domain.
- Notel For non-production data, the number of subjects in the PDF archive are limited to improve
  performance. The most recently added subjects are included according to the date the subject card was
  created.

An information message is displayed: For this mode the PDF Archive is limited to a sample of [X] subjects.

# 2 Output file(s)

One .zip file is downloaded for each PDF export performed.

 One separate PDF file is generated for each site and all the PDFs are archived in a .zip file. The PDF file names reflect the site code and site name, as set in Viedoc Admin, under site settings.

> This PC > Downloads > _20180903_094044	
Name	✓ Type
🔁 AHU Academic Hospital Uppsala	Adobe Acrobat Document
🗾 CUB Charite University Hospital Berlin	Adobe Acrobat Document
🗾 HUH Helsinki University Hospital	Adobe Acrobat Document
🗾 IMU Innsbruck Medical University	Adobe Acrobat Document
🗾 KCH King's College Hospital London	Adobe Acrobat Document
🗾 KIS Karolinska Institute Stockholm	Adobe Acrobat Document
🗾 UBR University of Brescia	Adobe Acrobat Document
🔁 UCH University College Hospital London	Adobe Acrobat Document
🔁 UMF University Medical Center Freiburg	Adobe Acrobat Document
🔁 UMG University Medical Center Groningen	Adobe Acrobat Document
👎 VUA VU Medical Center Amsterdam	Adobe Acrobat Document

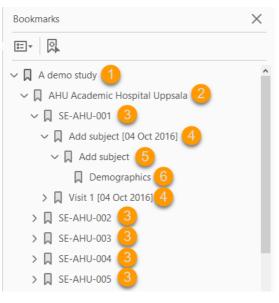
 For the FDA submission format (eCTD), there is one folder for each site, and each folder contains one separate PDF file for each subject (file name is the same as the subject ID):

This PC > Downloads > _20180910_104945 > AHU Academic Hospital Uppsala				
Name	Туре	Compressed size		
🔁 SE-AHU-001	Adobe Acrobat Document	98 KB		
🗾 SE-AHU-002	Adobe Acrobat Document	100 KB		
🔁 SE-AHU-003	Adobe Acrobat Document	98 KB		
🔁 SE-AHU-004	Adobe Acrobat Document	86 KB		
🗾 SE-AHU-005	Adobe Acrobat Document	100 KB		
🗾 SE-AHU-006	Adobe Acrobat Document	115 KB		
🟃 SE-AHU-007	Adobe Acrobat Document	97 KB		
🗾 SE-AHU-008	Adobe Acrobat Document	100 KB		
🔁 SE-AHU-009	Adobe Acrobat Document	85 KB		
🗾 SE-AHU-010	Adobe Acrobat Document	108 KB		
🗾 SE-AHU-011	Adobe Acrobat Document	198 KB		
🗾 SE-AHU-012	Adobe Acrobat Document	84 KB		
🔁 SE-AHU-013	Adobe Acrobat Document	112 KB		

# PDF file structure/content

3

This section describes the structure of the exported PDF file.



The file is structured as follows:

1. A study summary on the <u>first page</u>.

- 2. A site summary page.
- 3. One separate sub-section for each subject in the respective site.
- 4. For each subject, one sub-section for each event.
- 5. For each event, one sub-section for each activity.

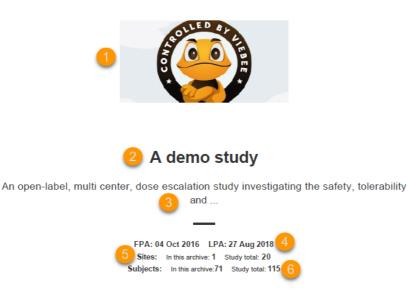
6. For each activity, one sub-section for each form. The latest version of the form PDFs are included here. See also **Audit trail and Form History** section in <u>Entering/editing data</u>.

The meaning of the signature in Viedoc is included on the last page.

Note! If the number of forms for a site exceeds 1000, the system splits the archive into one PDF file per subject and stores them in a zip file.

3.1 First page

The first page provides a short summary, as illustrated in the image and explained below:



- 1. The study logo image, if any, as set in Viedoc Admin, under Study Settings.
- 2. Study name, as set in Viedoc Admin, under Study Settings.
- 3. Study description, as set in Viedoc Designer.
- 4. The dates for:
  - First Patient Added (FPA) in the study
  - Last Patient Added (LPA) in the study
- 5. The number of sites:
  - In this archive the number of sites selected to be included in the export.
  - Study total the total number of sites in the study.
- 6. The number of subjects:
  - In this archive the number of subjects selected to be included in the export.
  - Study total the total number of subjects in the study.

#### 3.2 Site summary page

The site summary page provides a summary of the site, as illustrated in the image and explained below:

# A demo study A demo study Academic Hospital Uppsala

	Site code	Country	_
3	AHU	Sweden	- 4
_	Time zone		-
5	(UTC+01:00) Amsterdam, Berlin, Bern, Rome	Stockholm, Vienna	
_	FPA	LPA	
6	04 Oct 2016	27 Aug 2018	7
	Subjects (in this archive/total)		
8	71/71		
1			

1. The study name, as set in Viedoc Admin.

- 2. The site name, as set in Viedoc Admin.
- 3. The site code, as set in Viedoc Admin.
- 4. The country for the respective site, as set in Viedoc Admin.
- 5. The site time zone, as set in Viedoc Admin.
- 6. Date of First Patient Added (FPA) to the site, in the site timezone.
- 7. Date of Last Patient Added (LPA) to the site, in the site timezone.

8. Number of subjects from the site included in the export / total number of subjects in the site (this number will exclude deleted subjects if *Exclude deleted subjects/events/forms* is checked).

Following the site summary page, comes a Contents list of the subjects included in the export for the respective site, with the Subject ID and corresponding pages. After that, comes one sub-section for each subject, described in the next topic.

### 3.3 Subject summary page

The subject summary page provides the following information:

A demo study / Academic Hospital Uppsala		
3 Subject added 17 Nov 2017 11:11 CET	Forms (in this archive/total) 23/24	
5 Contents		
Add subject [17 Nov 2017]		5 - 6
Visit 1 [16 Oct 2017]	Initiated	7 - 19
Visit 2 [23 Oct 2017]	Initiated	20 - 28
Visit 3	Initiated	29 - 39

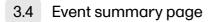
1. The study name and site name, as set in Viedoc Admin.

2. Subject ID in the format set in Viedoc Designer.

3. The date and time the subject was added.

4. The number of Forms filled in / the total number of forms for that subject.

5. A table of **Contents** with a list of all the events that contain data for the respective subject, the event status and the page numbers where the data related to the respective event can be found.



The event summary page provides the following information:

A demo study / Academic Hospital Uppsala 1 SE-AHU-023 / Visit 1 [16 Oct 2017] 2					
Contents 3 4 Visit 1 [16 Oct 2017]	5 Awaits signing	68			
Check Questions	Awaits signing	9			
Physical Examination	Awaits signing	10 - 11			
Vital Signs	Awaits signing	12			
12-Lead ECG	Awaits signing	13			
Body measurements	Awaits signing	14			
Safety Laboratory Parameters	Awaits signing	15			
Eligibility	Awaits signing	16			
Visit status	Awaits signing	17			
Clinical chemistry	Awaits signing	18 - 19			

1. The study name and site name, as set in Viedoc Admin.

2. Subject ID in the format set in Viedoc Designer and the event name together with the date when it was initiated.

3. A table of **Contents** with a list of all the forms within the respective event for Scheduled and Unscheduled events, providing the following information:

- Form name (4)
- Status (5) one of the following, depending on if the form was signed by the site:
  - Awaits signing
    - *Signed*, followed by the name of the user who has signed and the timestamp (in site timezone).
- Page numbers (6) where the respective form can be found.

For Common Events, each entry will have its own Event summary page.

For each form, the form PDF is included, in the same format as for the form history pdf file. For details, see **Form history PDF** in <u>Entering/editing data</u>.

3.4.1 The sort order of the forms

The forms in the PDF are sorted by these characteristics:

- 1. Subject key, in ascending order
- 2. Event type (scheduled, unscheduled, common)
- 3. Date the date of the first form save of the activity
- 4. The order of the forms according to the study design

The following example illustrates the sort order.

Suppose the study design looks like this:

D New Study Design [7.0]	Close
Study Workflow Study Start Scheduled Events Common Events	Show time OFF . Print
1       E01_E01         1       E01_A01:         6       Form A         9       Form B         9       Form C	1
2 III E02: E02	Ø Ŧ
# E02_A01:       # E02_A02:       # E02_A03:         Form A       A       A       Form B       A         Form A       A       A       A       A	

For the event E01, all forms belong to the same activity. This means that the order of the forms in the PDF will always be like this:

- Form A
- Form B
- Form C

For the event E02, there are three activities. This means that if any form from A02 gets saved first, then any form from A01 gets saved second, and then any form from A03 gets saved third, the order of the forms will be:

- 1. All forms from A02 according to the design
- 2. All forms from A01 according to the design
- 3. All forms from A03 according to the design

In other words, the order of forms for event E02 for this specific example will be like this:

- Form C
- Form D
- Form A
- Form B
- Form E



Queries in ODM export

# Queries in ODM export

Published by Viedoc System 2020-06-04

1. Introduction
2. Association
2.1 Annotation
2.1.1 Comment
2.1.2 "CL_ANNOTATION_TYPE
2.1.3 "CL_QRY_STATE"
2.1.4 "CL_QRY_ITEM_SEQ_NO
2.1.5 v4:AuditRecord
3. Sorting the entries for a query

### 1 Introduction

To include the query information in the exported file, you need to select **Queries** under **Type of data** in the Data Export page.

The Queries can be exported to the following export output formats:

- Microsoft Excel Office Open Extensible Markup Language (XML)
- Comma-separated values (<u>CSV</u>)
- Operational Data Model (<u>ODM</u>) in this case, the Query history is not optional, but will be included regardless. For this reason it is not displayed as an option.

This lesson describes how and where to find the query related information in the ODM export.

# 2 Association

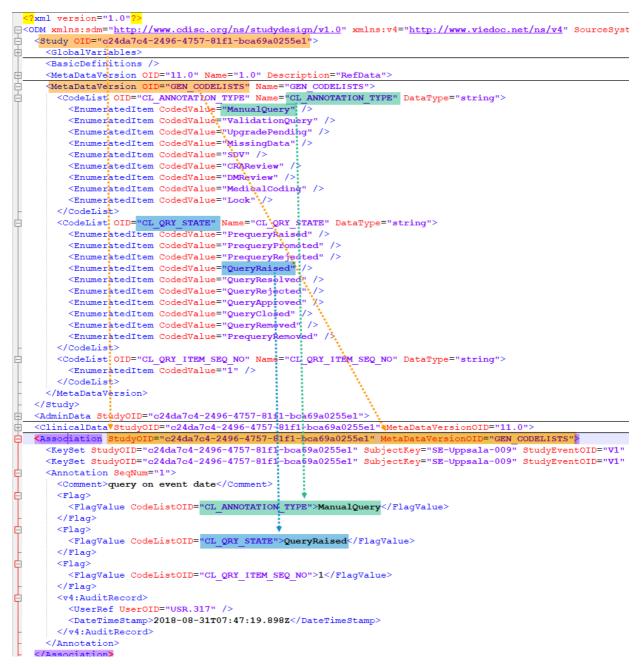
In the <u>ODM</u> export output file, the queries are stored under the Association tag.

As the query history is always included in the ODM export, there is an Association entry for each query state (for example if there is one query that has been through 3 different states namely raised, resolved and approved, there will be 3 different Association entries).

Note! All association elements are sorted by the AuditRecord datetime stamp.

Each Association links an item (identified by the KeySet , see the description below) to a set of properties related to a specific query wrapped under the Annotation tag (see detailed description below).

The image illustrates an example of an ODM export output, with the information within the Study tag at the top of the image and a query information under the Association tag at the bottom of the image:



For each Association entry, the following information is provided:

- The StudyOID and the MetaDataVersionOID indicate where the respective information is defined.
- The KeySet is generally used to identify the start and end of the annotated "link". For queries, <u>both key</u> <u>sets are identical</u>, as they identify the same item, namely the item the respective query corresponds to. It contains the following:
  - StudyOID
  - SubjectKey
  - StudyEventOID
  - StudyEventRepeatKey
  - FormOID
  - FormRepeatKey
  - ItemGroupOID applicable only for queries on item level.
  - ItemOID applicable only for queries on item level.

#### 2.1 Annotation

The Annotation tag wraps the specific information of the respective query, as described below. Since there is only one Annotation within an Association , the SeqNum is always "1".

#### 2.1.1 Comment

The Comment value depends on the query state and is set as follows:

• If the query state is QueryRaised or PrequeryRaised, the query text is specified here.

- If the query state is QueryRejected or QueryResolved, the resolution text is specified here, as in our example "I am confirming the data".
- No comment element is present for other cases than the ones mentioned above.

#### 2.1.2 "CL ANNOTATION TYPE"

CodeListOID="CL ANNOTATION TYPE" indicates the annotation type, for example "ManualQuery" :

All the possible annotation types can be found under the Study tag, under the respective StudyOID and MetaDataVersionOID , respectively:

- "ManualQuery"
- "ValidationQuery"
- "UpgradePending'
- "MissingData"
- "SDV"
- "CRAReview"
- "DMReview" .
- "MedicalCoding"
- "Lock"

Of all the above, only the following refer to queries:

- "ManualQuery"
- "ValidationQuery"
- "UpgradePending'
- "MissingData"

Notel The "MissingData" annotation type is used both for unconfirmed missing data and missing data, there is no distinction between those in the ODM export.

2.1.3 "CL\_QRY\_STATE"

CodeListOID="CL\_QRY\_STATE" indicates the query state, for example "QueryRaised .

All the possible query states can be found under the Study tag, under the respective StudyOID and MetaDataVersionOID, respectively:

- 1. "PrequeryRaised"
- 2. "PrequeryPromoted"
- 3. "PrequeryRejected"
- 4. "QueryRaised"
- 5. "QueryResolved"
- 6. "QueryRejected"
- 7. "QueryApproved"
- 8. "QueryClosed"
- 9. "QueryRemoved"
- 10. "PrequeryRemoved"

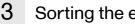
For more details about the query and pre-query states, see Queries overview.

#### 2.1.4 "CL QRY ITEM SEQ NO"

CodeListOID="CL ORY ITEM SEQ NO" indicates the sequence number of the respective query for the linked item. This is used to identify the query, meaning that all the Annotation entries corresponding to different states of the same query, will have the same value of CodeListOID="CL QRY ITEM SEQ NO" and same KeySet .

#### 2.1.5 v4:AuditRecord

v4:AuditRecord contains the audit record for the respective annotation.



### Sorting the entries for a query

Since the same query can go through many query states, there can be many Annotations with the same value of CodeListOID="CL\_QRY\_ITEM\_SEQ\_NO" and same KeySet . In order to get the latest entry for the same query, you can sort as follows:

1. First by date and time of the audit record.

2. For the entries having the same date and time stamp, order by the value of the CodeListOID="CL\_QRY\_STATE", as listed <u>above</u>.



Queries in Excel export

# Queries in Excel export

Published by Viedoc System 2024-10-10

The Queries can be exported to the following export output formats:

- Microsoft Excel Office Open Extensible Markup Language (XML)
- Comma-separated values (<u>CSV</u>)
- Operational Data Model (ODM)

To include the query information in the exported file, you need to select **Queries** under **Type of data** in the Data export page. When selecting to include **Queries**, the **Query history** option becomes available.

Data Export All sites Sweden		
Subjects to include ( 21 ) All subjects		+
Events and time period All events		+
Forms and items       All forms (1)		+
Type of data Signed data  Not Signed data SDV p	erformed or NA 🚳 SDV pending 🚳 Queries 🚳 Query history 🚳	
Signed data	✓ Not Signed data	
SDV performed or NA	SDV pending	
In addition to data, also include the followi Cueries Review status Event dates Uploaded files	ng in the export (will not be included in Preview data)           Query history           Medical coding           Edit status	

Depending on if the **Query history** is included in the export or not, the information in the export output file is grouped as follows:

- Without Query history there is one row for each query, providing information on the current state of the query.
- With **Query history** there is one row for each change in a query state, that is, there can be many rows for one and the same query.

In the Excel export output, considering as an example the default settings under Output format:

- Output to Excel
- Group data by form
- 1 row per activity

...the query information is grouped in a separate sheet of the excel file, called Queries.

The columns provide information on the item that the query was raised on, followed by the query specific information, as illustrated in the image (the image shows the query-specific information only) and listed in the following table:

	R	S	Т	U	V	W	Х
C	uery item sequence number	Raised on	Query type	Range check OID	Query text	Query state	Query resolution
С	ueryItemSeqNo	RaisedOn	QueryType	RangeCheckOID	QueryText	QueryState	QueryResolution
2 1		Item	Validation	RC_DMAGE_1_0_1	Age is not within the expected range (19-65), defined per	Query Raised	
3 1		Item	Validation	RC_DMAGE_1_0_1	Age is not within the expected range (19-65), defined per	Query Closed	Closed due to data edit
4 2		Event date	Manual		Visit date is not within the protocol visit window	Query Raised	
5 1		Item	Validation	RC_VSSYS_0_0_1	Value is outside of normal range. Please verify.	Query Raised	
5 1		Item	Validation	RC_VSSYS_0_0_1	Value is outside of normal range. Please verify.	Query Resolved	Correct
71		Item	Validation	RC_VSPULSE_0_0_1	Value is outside of normal range. Please verify.	Query Raised	
8 1		Item	Validation	RC_VSPULSE_0_0_1	Value is outside of normal range. Please verify.	Query Resolved	Correct
9 1		Item	Validation	RC_VSSYS_0_0_1	Value is outside of normal range. Please verify.	Query Raised	
0 1		Item	Validation	RC_VSSYS_0_0_1	Value is outside of normal range. Please verify.	Query Resolved	Correct
1 1		Item	Validation	RC_VSPULSE_0_0_1	Value is outside of normal range. Please verify.	Query Raised	
2 1		Item	Validation	RC_VSPULSE_0_0_1	Value is outside of normal range. Please verify.	Query Resolved	Correct
3 1		Item	Validation	RC_VSSYS_0_0_1	Value is outside of normal range. Please verify.	Query Raised	
4 1		Item	Validation	RC_VSPULSE_0_0_1	Value is outside of normal range. Please verify.	Query Raised	
5 1		Item	Validation	RC_VSPULSE_0_0_1	Value is outside of normal range. Please verify.	Query Raised	
6 1		Event date	Validation		Visit date is not within the protocol visit window	Query Raised	
71		Event date	Validation		Visit date is not within the protocol visit window	Query Raised	
8 1		Item	Manual		Is data correct?	Query Raised	
9 1		Item	Manual		Is data correct?	Query Resolved	Data correct
0 1		Item	Validation	RC_VSPULSE_0_0_1	Value is outside of normal range. Please verify.	Query Raised	
. K.	▶ CC   LAB   MH	 н   на   о	CM AE ExampleForm	Items CodeLists	Queries + i •		

Column name	Description
Query study sequence number	Counter that identifies the query globally within the whole study. This field is empty for the <i>Unconfirmed missing data</i> .
	Columns that identify the item
Site sequence number	Counter that identifies the site globally within the study.
Site name	The site name, as set in Viedoc Admin.
Site code	The site code, as set in Viedoc Admin.
Subject sequence number	Counter that identifies the subject within the site.
Subject Id	The Subject ID, in the format configured in Viedoc Designer. The Subject ID is the subject identifier displayed in Viedoc Clinic on the subject card, subject details page, and so on.
Event sequence number	Counter that identifies the event within the sequence of events for the same subject.
Event Id	The event ID, as set in the study design (in Viedoc Designer).
Event name	The event name, as set in the study design (in Viedoc Designer) and displayed in Viedoc Clinic.
Event date	The event date, as set in Viedoc Clinic when the event is initiated.
Activity Id	The activity ID, as set in the study design (in Viedoc Designer).
Activity name	The activity name, as set in the study design (in Viedoc Designer) and displayed in Viedoc Clinic.
Form Id	The form ID, as set in the study design (in Viedoc Designer).
Form name	The form name, as set in the study design (in Viedoc Designer) and displayed in Viedoc Clinic.
Form sequence number	Counter that identifies the instance of the respective form within the respective activity. This is used for the repeating forms. For non-repeating forms, this is always "1".
ltem Id	The item ID, as set in the study design (in Viedoc Designer).

Column name	Description
Item Name	The item name, as set in the study design (in Viedoc Designer) and displayed in Viedoc Clinic.
	Query specific information
Query item sequence number	Counter that identifies the query within a sequence of queries for the same item.
Raised on	Specifies if the query was raised on an item or on the event date: <ul> <li>Item</li> <li>Event date</li> </ul>
Query type	<ul> <li>Specifies the query type, depending on how it was raised:</li> <li>Manual - for manually raised queries.</li> <li>Missing data - data confirmed as missing</li> </ul>
	<ul> <li>Pending form upgrade - forms pending upgrade as a result of applying a revision of the study design</li> <li>Unconfirmed missing data</li> <li>Validation - for automatically raised queries, as a result of validation.</li> </ul>
Range check OID	Only for automatically raised item queries (i.e. <b>Query type</b> = <i>Validation</i> and <b>Raised on</b> = <i>Item</i> ). The unique Object Identifier (OID) of the edit check that generated the query, as set in Viedoc Designer.
Query text	The text of the query.
Query state	Can be one of the following (see also <u>Query overview</u> ): <ul> <li>Query Raised</li> <li>Query Resolved</li> <li>Query Approved</li> <li>Query Rejected</li> <li>Query Closed</li> <li>Query Removed</li> </ul> Notel The queries that were automatically closed due to form reset/delete (with status Query Closed) are not included in the export.
Query resolution	The resolution text entered when resolving (answering) the query. Not applicable for those changes performed by the system (i.e. <b>User name</b> = <i>System (0)</i> )
User name	The name of the user who performed the changes, followed by the user ID in parentheses. Notel For those changes performed by the system (such as validation queries, that are automatically raised by the system) the <b>User name</b> = <i>System (0).</i>
Date & time (UTC)	The date and time when the change was performed.
User role	The role of the user who <u>performed the action on the query</u>
Query raised by role	The role of the user who <u>raised the query</u>

**چ** 

Medical coding in ODM export

# Medical coding in ODM export

Published by Viedoc System 2020-06-04

1. Introduction
2. Codelists
2.1 Dictionary type
2.2 Dictionary instance
2.3 Dictionary properties
2.4 Coding scopes
3. Medical coding items
3.5 Association
<u>3.6 KeySet</u>
3.7 Annotation
<u>3.7.1 Flags</u>
3.7.2 AuditRecord

1

# Introduction

This lesson describes how the medical coding information is structured within an Operational Data Model (<u>ODM</u>) file exported from Viedoc.

For general details about data export, see Exporting data.

# 2 Codelists

#### 2.1 Dictionary type

There is one CL\_DICT\_TYPE codelist that contains one entry for each dictionary type present in the exported data:

```
<CodeList OID="CL_DICT_TYPE" Name="CL_DICT_TYPE" DataType="string">
<EnumeratedItem CodedValue="MEDDRA" />
<EnumeratedItem CodedValue="WHODRUG" />
</CodeList>
```

#### 2.2 Dictionary instance

There is one codelist for each dictionary instance present in the exported data, which contains one <ExternalCodeList> element pointing to a specific dictionary version, that specifies:

- Dictionary type Dictionary
- Version description Version
- Source hash ref

<sup>&</sup>lt;CodeList OID="CL\_MEDDRA\_VERSION\_19.0" Name="CL\_MEDDRA\_VERSION\_19.0" DataType="string">

<sup>&</sup>lt;ExternalCodeList Dictionary="MEDDRA" Version="Version 19.0" ref="2A04E4B5D79A838E64DF1A18FF23400A" /> </CodeList>

CodeList OID="CL\_WHODRUG\_WHO\_DDE\_C3\_SEPTEMBER 1\_2017" Name="CL\_WHODRUG\_WHO\_DDE\_C3\_SEPTEMBER 1\_2017" DataType="string">
 </codeList Dictionary="WHODRUG" Version="WHO DDE C3 September 1, 2017" ref="A43B613AD1CCBFE9CE8E324FF0037398" />
</CodeList>

#### 2.3 Dictionary properties

There is one codelist with dictionary properties for each dictionary present in the exported data. Each such codelist contains items for each property the dictionary defines:

	,
þ	<pre><codelist datatype="string" name="CL MEDDRA PROP" oid="CL MEDDRA PROP"></codelist></pre>
	<enumerateditem codedvalue="soc_code"></enumerateditem>
	<enumerateditem codedvalue="soc name"></enumerateditem>
	<enumerateditem codedvalue="soc abbrev"></enumerateditem>
	<enumerateditem codedvalue="hlgt code"></enumerateditem>
	<enumerateditem codedvalue="hlgt name"></enumerateditem>
	<enumerateditem codedvalue="hlt code"></enumerateditem>
	<enumerateditem codedvalue="hlt name"></enumerateditem>
	<enumerateditem codedvalue="pt code"></enumerateditem>
	<enumerateditem codedvalue="pt name"></enumerateditem>
	<enumerateditem codedvalue="pt soc code"></enumerateditem>
	<enumerateditem codedvalue="llt code"></enumerateditem>
	<enumerateditem codedvalue="llt_name"></enumerateditem>
	<enumerateditem codedvalue="llt_currency"></enumerateditem>
_	
10 E	

#### 2.4 Coding scopes

There is one codelist for each dictionary coding scope present in the exported data, specifying:

- Coding scope ID
- Coding scope name

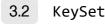
```
<CodeList OID="CL_CODING_SCOPE" Name="CL_CODING_SCOPE" DataType="string">
<CodeListItem CodedValue="253">
<Decode>
<TranslatedText xml:lang="en">Adverse events</TranslatedText>
</Decode>
</CodeListItem>
<CodeListItem>
<CodeListItem CodedValue="381">
<Decode>
<TranslatedText xml:lang="en">Concomitant medication</TranslatedText>
</Decode>
</CodeListItem CodedValue="381">
<CodeListItem CodedValue="381">
</CodeListItem>
</CodeList[
</Cod
```

# 3 Medical coding items

#### 3.1 Association

For each medical coding item, there is one <Association> entry.

Each Association links an item (identified by the KeySet , see the description below) to a set of properties related to a specific Annotation (see detailed description below).



The KeySet is generally used to identify the start and end of the annotated "link". In this case, both key sets are the same, as they identify the same entity, namely the one the respective action (defined under the Annotation ) corresponds to.

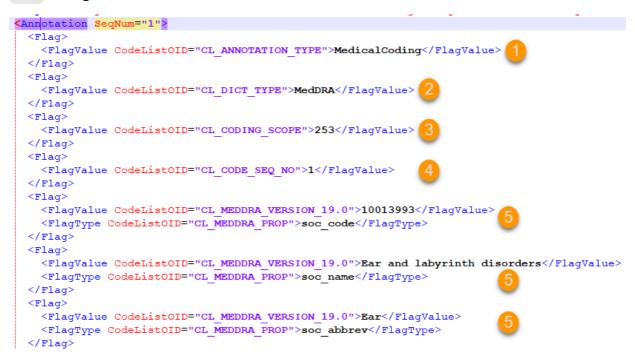
The KeySet specifies the following attributes:

- StudyOID
- SubjectKey
- StudyEventOID
- StudyEventRepeatKey
- Depending on the medical coding scope (Event/Activity/Form/Item group/Item), the following may be specified:
  - FormOID not applicable for event scope
  - FormRepeatKey not applicable for event scope
  - ItemGroupOID applicable for item group and item scope
  - ItemOID applicable only for item scope

#### 3.3 Annotation

The Annotation consists of a set of <Flag> elements, and an audit record if the export was set to include the Viedoc extensions.

3.3.1 Flags



1. One flag element for the annotation type, with a <FlagValue> that is always MedicalCoding in this case.

2. One flag element for the dictionary type, with a <FlagValue> set to one of the <u>CL\_DICT\_TYPE</u> items.

3. One flag for the medical coding scope, with a <FlagValue> set to one of the <u>CL\_CODING\_SCOPE</u> items.

4. One flag element for the code sequence number, with a set to one of the CL\_CODE\_SEQ\_N0 items.

5. One flag element for each dictionary property set, with a <FlagValue> set to the dictionary property codelist (for example CL\_MEDDRA\_PROP) and a <FlagValue> set to the property value.

#### 3.3.2 AuditRecord

The <v4:AuditRecord> is a Viedoc extension and is included in the output file only if the option to **Include** extensions was selected at export time.

It contains information on the user ID and the date/time stamp.

In the example image below the user ID = 304:

```
<v4:AuditRecord>
<UserRef UserOID="USR.304" />
<DateTimeStamp>2018-08-29T11:43:30Z</DateTimeStamp>
</v4:AuditRecord>
```

**ح** 

Medical coding in Excel export

# Medical coding in Excel export

Published by Viedoc System 2024-06-26

1. Introduction 2. Medical coding information in Excel 3. An example - WHODrug in Excel exported file 3.1 When selecting Drug 3.2 When selecting Preferred name

1 Introduction

This lesson describes how the medical coding information is structured within an Excel file exported from Viedoc.

To include the medical coding information in the exported file, you need to select **Medical coding** under **Type of data** in the Data Export page:

Type of data         Signed data       Not Signed data         SDV performed or NA	SDV pending Medical coding
Signed data	🕑 Not Signed data
SDV performed or NA	SDV pending
In addition to data, also include the following in the expon Queries Review status Event dates Uploaded files	rt (will not be included in Preview data)          Medical coding         Edit status

For general details about data export, see Exporting data.

2 Medical coding information in Excel

For medical coding, in the Excel export output file, there is one sheet for each dictionary. Only values that have been coded will be present in the export:

Form Id	Form name	Form sequence number	Item Id	Item name	Term	Dictionary instance	Coding scope description	Coding scope leve
FormId	FormName	FormSeq	ItemId	ItemName	Term	DictInstance	CodingScopeDesc	CodingScopeLevel
CM	Prior and Concomitant Medications	1	CMDRUG	Drug	Paracetamol	WHODrug, Version 180829	Concomitant medication	Item
CM	Prior and Concomitant Medications	1	CMDRUG	Drug	Paracetamol	WHODrug, Version 180829	Concomitant medication	Item
CM	Prior and Concomitant Medications	1	CMDRUG	Drug	Paracetamol	WHODrug, Version 180829	Concomitant medication	Item
CM	Prior and Concomitant Medications	1	CMDRUG	Drug	Cinnarizine	WHODrug, Version 180829	Concomitant medication	Item
CM	Prior and Concomitant Medications	1	CMDRUG	Drug	Cinnarizine	WHODrug, Version 180829	Concomitant medication	Item
CM	Prior and Concomitant Medications	1	CMDRUG	Drug	Montelukast	WHODrug, Version 180829	Concomitant medication	Item
CM	Prior and Concomitant Medications	1	CMDRUG	Drug	Humalog insulin	WHODrug, Version 180829	Concomitant medication	Item
CM	Prior and Concomitant Medications	1	CMDRUG	Drug	Paracetamol	WHODrug, Version 180829	Concomitant medication	Item
CM	Prior and Concomitant Medications	1	CMDRUG	Drug	Aspirin	WHODrug, Version 180829	Concomitant medication	Item
<b>↓</b>	HA   CM   AE   ExampleForm	n Items CodeLists	MedDRA	WHODr	ug 🕂 🗄	4		Þ

The columns provide information on the item that was coded, followed by the medical coding specific information, as listed in the following table:

Column name	Description
	Columns that identify the item
Site sequence number	A counter that identifies the site globally within the study
Site name	The site name, as set in Viedoc Admin
Site code	The site code, as set in Viedoc Admin
Subject sequence number	A counter that identifies the subject within the site
Subject Id	The Subject ID, in the format configured in Viedoc Designer. The Subject ID is the subject identifier displayed in Viedoc Clinic on the subject card, subject details page, and so on.
Event sequence number	A counter that identifies the event within the sequence of events for the same subject
Event Id	The event ID, as set in the study design (in Viedoc Designer)
Event name	The event name, as set in the study design (in Viedoc Designer) and displayed in Viedoc Clinic
Event date	The event date, as set in Viedoc Clinic when the event is initiated
Activity Id	The activity ID, as set in the study design (in Viedoc Designer)
Activity name	The activity name, as set in the study design (in Viedoc Designer) and displayed in Viedoc Clinic
Form Id	The form ID, as set in the study design (in Viedoc Designer)
Form name	The form name, as set in the study design (in Viedoc Designer) and displayed in Viedoc Clinic
Form sequence number	Counter that identifies the instance of the respective form within the respective activity. This is mostly used for repeating forms.
	For non-repeating forms, this is <b>1</b> . If a form is reset and then saved again the new form has sequence number <b>2</b> , and so on.
	Form sequence number increases one step every time reset/initiate occurs.
Subject form sequence number	Counter that uniquely identifies the instance of a specific form on a subject level, that is, it starts with 1 and it is incremented each time a new instance of the form is created for that subject.
Origin Subject form sequence number	For a copied form instance, it identifies the form instance from which data was copied for the first time. For the first instance of the form (that is, not copied) it gets the value of the SubjectFormSeqNo.

Description
For a copied form instance, a counter that identifies the source of a copied form instance (the form instance the data was copied from). It gets the value of the SubjectFormSeqNo from which the form instance was copied. For the first instance of the form (not copied) it is empty (null).
The item ID, as set in the study design (in Viedoc Designer)
The item name, as set in the study design (in Viedoc Designer) and displayed in Viedoc Clinic
Medical coding-specific information
The coded term
The description of the dictionary instance, as set in Viedoc Admin when uploading the dictionary
The dictionary version.
The coding scope description, as defined in Viedoc Designer
The coding scope level, as defined in Viedoc Designer, can be one of the following: Event Activity Form Item group Item
A counter that identifies the code for those values with more than one code
Dictionary-specific information

WHODrug <sup>.</sup>	MedDRA:	ATC without DDD:	IDF:
WHODrug: • DrugCode • DrugName • NameSpecifier • OldForm • Ingredients • ATCCodes • CountryName • MAH (MAH) • PharmForm • Strength • MedProdId • Generic • PreferredCode • PreferredName • Name	MedDRA: • soc_code • soc_abbrev • hlgt_code • hlgt_name • pt_code • pt_name • pt_soc_code • llt_code • llt_code • llt_code • llt_currency	ATC without DDD: - L1 code - L2 code - L2 name - L3 code - L3 name - L4 code - L4 name - L5 code - L5 name	IDF: ・ L1薬剤 ・ L1薬汁薬 ・ L1薬汁薬 ・ L1素汁薬 ・ L2薬剤 ・ L2素汁薬 ・ L2素汁 ・ L2素素 ・ L2 ・ 一 ・ L2 ・ L2 ・ ・ ・ し ・ ・ ・ ・ ・ ・ ・ ・ ・ ・ ・ ・ ・

Column name	Description
	<ul> <li>L6使用区分1</li> <li>L6使用区分2</li> <li>L6基準名 コード</li> <li>L6メーカ ーコード</li> <li>L6メーカ ーコード</li> <li>L6メーカ ーコード</li> <li>L6メーカ ーの略称</li> <li>L6剤形コ ード</li> <li>L6薬剤コ ード区分1</li> <li>L6メンテ 年月</li> </ul>
Interpretation	The medical coder's interpretation of the applied coding value
Coded by user	The name of the user who performed the coding, followed by the user ID in parentheses
Coded on date	The date and time when the coding was performed
Approved by user	The name and ID of the user who approved the items
Approved on date (UTC)	The date and time (UTC) when the item was approved

## 3 An example - WHODrug in Excel exported file

This section illustrates an example of how the data coded using the World Health Organization Drug Dictionary (<u>WHO DD</u>) dictionary looks in the Excel export output.

There are two different use cases, depending on the which level of granularity is selected when applying the code in Viedoc Clinic:

#### 1. Drug (default)

#### 2. Preferred name

Find	and apply code	
ωно	Drug	
Sear	ch options	•
code	ine	٩,
Pref	12818602001 Acetylsalicylic acid;Caffeine;Codeine phosphate	2
Drug	12818602012 A. c. with codeine	

#### 3.1 When selecting Drug

The image below illustrates how the coded data looks in the export output, if the **Drug** is selected when applying the code in Viedoc Clinic.

When **Drug** is selected, the **Preferred code** and **Preferred name** come out in the export as well, in the last columns, as illustrated in the image.

Find	and apply code	
wно	Drug	
Sear	ch options	•
code	sine	
Pref	12818602001 Acetylsalicylic acid;Caffeine;Codeine phosphate	0
Drug	12818602012 A. c. with codeine	۲
Spec		
INGR	Acetylsalicylic acid;Caffeine;Codeine phosphate	
ATC	N02AJ Opioids in combination with non-opioid analgesics 🗶	

Applied code in Excel export output

				<b>_</b>				
	V	W	X	Y	Z			AA
1	DrugCode	DrugName	NameSpecifier	OldForm	Ingredients	AT	CCodes	5
2	DrugCode	DrugName	NameSpecifier	OldForm	Ingredients	AT	CCodes	;
3	12818602012	A. c. with codeine		N	Acetylsalicylic acid;Caffeine;Codeine phos	phate N0	2AJ Op	ioids in combination with non-opioid analgesics
4								
5								
6								
7								
8								
9								
10								
11								
						<u> </u>		
	< >   F	README PI LA	B PainLevel	LABR	Items CodeLists WHODrug (+	)		: •
						AM		AN
						Preferred		Preferred Name
						Preferred		PreferredName
						128186020	01	Acetylsalicylic acid;Caffeine;Codeine phosphate

### 3.2 When selecting Preferred name

The image below illustrates how the coded data looks in the export output, if the **Preferred name** is selected when applying the code in Viedoc Clinic.

After the **Preferred name** is selected and the code is applied, for the respective coded item, the value of the **Preferred name** ends up in both **Drug** and **Pref** fields, in both Viedoc Clinic, as well as in the exported output.

Find and apply code	
WHODrug	
Search options 🔻	
codeine	
Pref 12818602001 Acetylsalicylic acid;Caffeine;Codeine phosphate	
Drug 12818602012 A. c. with codeine	0
Spec	
INGR Acetylsalicylic acid;Caffeine Codeine phosphate	11
ATC N02AJ Opioids in combination with non-opioid analgesics 🗙	
Select Pref and apply code	
Find and apply code	
WHODrug	
Search options	
Search	
Pref 12818602001 Acetylsalicylic acid;Caffeine;Codeine phosphate	۲
Drug 12818602001 Acetylsalicylic acid;Caffeine;Codeine phosphate	0
Spec	
INGR Acetylsalicylic acid;Caffeine;Codeine phosphate	1
ATC N02AJ Opioids in combination with non-opioid analgesics 🗶	

#### Find and apply code

•
۲
0
1

Applied code in Excel export output

		· · · · · · · · · · · · · · · · · · ·				
1	V	W	X	Y	Z	AA
1	DrugCode	DrugName	NameSpecifier	OldForm	Ingredients	ATCCodes
2	DrugCode	DrugName	NameSpecifier	OldForm	Ingredients	ATCCodes
3	12818602001	Acetylsalicylic acid;Caffeine;Codeine phosphate		N	Acetylsalicylic acid;Caffeine;Codeine phosphate	N02AJ Opioids in combination with non-opioid analgesics
4						
-	1					

AM AN
Preferred Code Preferred Name
PreferredCode PreferredName
12818602001 AcetyIsalicylic acid;Caffeine;Codeine phosphate

**چ** 

Review status in ODM export

# Review status in ODM export

Published by Viedoc System 2023-06-21

1. Introduction
2. Codelists
<u>2.1 Review type</u>
2.2 Review state
3. Review actions
3.3 Association
<u>3.4 KeySet</u>
3.5 Annotation
<u>3.5.1 Flags</u>
3.5.2 AuditRecord

# 1 Introduction

This lesson describes how the review status information is structured within an Operational Data Model (<u>ODM</u>) file exported from Viedoc.

For general details about data export, see Exporting data.

To include the review status in the export, you need to select the **Review status** under **Type of data** in the Data Export page:

Type of data         Signed data       Not Signed data         SDV perform	ned or NA 🛞 SDV pending 🛞 Review status ⊗
Signed data	✓ Not Signed data
SDV performed or NA	SDV pending
In addition to data, also include the following in Queries Review status Event dates Uploaded files	the export (will not be included in Preview data)          Image: Medical coding         Image: Edit status

Note! When selecting one row per item as Layout, the review status is not included in the export.

Note! Source Data Verification (SDV) status is only exported on study event and item level. SDV on form level is excluded from the export.

### 2.1 Review type

The following annotation types are relevant for the review status and are listed in the CL\_ANNOTATION\_TYPE codelist:

- SDV
- CRAReview
- DMReview
- Lock
- Signature

<pre><metadataversion name="GEN CODELISTS" oid="GEN CODELISTS"></metadataversion></pre>
<pre>CodeList OID="CL ANNOTATION TYPE" Name="CL ANNOTATION TYPE" DataType="string"}</pre>
<pre><enumerateditem codedvalue="ManualQuery"></enumerateditem></pre>
<pre><enumerateditem codedvalue="ValidationQuery"></enumerateditem></pre>
<pre><enumerateditem codedvalue="UpgradePending"></enumerateditem></pre>
<pre><enumerateditem codedvalue="MissingData"></enumerateditem></pre>
<pre><enumerateditem codedvalue="SDV"></enumerateditem></pre>
<pre><enumerateditem codedvalue="CRAReview"></enumerateditem></pre>
<pre><enumerateditem codedvalue="DMReview"></enumerateditem></pre>
<pre><enumerateditem codedvalue="MedicalCoding"></enumerateditem></pre>
<pre><enumerateditem codedvalue="Lock"></enumerateditem></pre>
K/CodeList>

#### 2.2 Review state

There is a CL\_REVIEW\_STATE codelist that indicates the review state, which is always Checked for the annotation types mentioned above. If the respective review was not performed in Viedoc, there is simply no entry for it in the <u>ODM</u> file.

<CodeList OID="CL\_REVIEW\_STATE" Name="CL\_REVIEW\_STATE" DataType="string">
 </codeList
 </codeList>

# 3 Review actions

#### 3.1 Association

For each review action, there is one <Association> element.

Each Association links an item (identified by the KeySet , see the description below) to a set of properties related to a specific Annotation (see detailed description below).

### 3.2 KeySet

The KeySet is generally used to identify the start and end of the annotated "link". In this case, both key sets are the same, as they identify the same entity, namely the one the respective action (defined under the Annotation ) corresponds to.

- StudyOID
- SubjectKey
- StudyEventOID
- StudyEventRepeatKey
- FormOID
- FormRepeatKey
- ItemGroupOID
- ItemOID

#### 3.3 Annotation

The Annotation consists of a set of <Flag> elements, and an audit record if the export was set to include the Viedoc extensions.

```
3.3.1 Flags
```



1. One flag element for the review type, with a <FlagValue> set to one of the <u>CL\_ANNOTATION\_TYPE</u> items.

2. One flag element for the review state, with a <FlagValue> set to one of the <u>CL\_REVIEW\_STATE</u> items.

#### 3.3.2 AuditRecord

The <v4:AuditRecord> is a Viedoc extension and is included in the output file only if the option to **Include** extensions was selected at export time.

It contains information on the user ID and the date/time stamp.

In the example image below, the user ID = 294:

```
</vi>
```

Notes!

- The audit records for Viedoc Me actions have the User OID="USR.0" . This is applicable, for example, for the Lock action.
- The audit records for system actions have the User OID="SYSTEM" . This is applicable, for example, when the form is locked due to randomization.



Review status in Excel export

# Review status in Excel export

Published by Viedoc System 2023-10-09

#### 1. Review status 2. SDV

This lesson describes how the review status information is structured within an Excel file exported from Viedoc.

For general details about data export, see Exporting data.

# 1

### **Review status**

Notel When selecting one row per item as Layout, the review status is not included in the export.

#### In the Excel export output file, there is one separate sheet for the Review status:

Reviewed item	Clinical review by	Clinical review date (UTC)	Data review by	Data review date (UTC)	SDV by	SDV date (UTC)	Signed by	Signed date (UTC)	Lock by	Lock date (UTC)
ReviewedItem	CrBy	CrDate	DmBy	DmDate	SdvBy	SdvDate	SignBy	SignDate	LockBy	LockDate
Event date	Demo User (317)	2018-09-10 08:01			Demo User (317)	2018-09-10 08:01				
Event date	Demo User (317)	2018-09-10 08:00			Demo User (317)	2018-09-10 08:00				
Event date	Demo User (317)	2018-09-10 08:00			Demo User (317)	2018-09-10 08:00			Demo User (317)	2018-09-10 08:00
Event date										
Event date										
Event date										
Event date										
Event date					Demo User (317)	2018-07-31 11:45				
Event date										
Event date										
Event date										
Event date	Demo User (317)	2018-09-07 11:44			Demo User (317)	2018-09-07 11:44			Demo User (317)	2018-09-07 11:45
Event date	Demo User (317)	2018-09-10 08:00			Demo User (317)	2018-09-10 08:00			Demo User (317)	2018-09-10 08:00
Form										

The first columns provide information for identifying the form that was reviewed, followed by the review information, as listed in the following table:

Column name	Description		
	Columns that identify the form		
Site sequence number	Counter that identifies the site globally within the study.		
Site name	The site name, as set in Viedoc Admin.		
Site code	The site code, as set in Viedoc Admin.		
Subject sequence number	Counter that identifies the subject within the site.		
Subject Id	The Subject ID, in the format configured in Viedoc Designer. The Subject ID is the subject identifier displayed in Viedoc Clinic on the subject card, subject details page, and so on.		
Event sequence number	Counter that identifies the event within the sequence of events for the same subject.		

Column name	Description
Event Id	The event ID, as set in the study design (in Viedoc Designer).
Event name	The event name, as set in the study design (in Viedoc Designer) and displayed in Viedoc Clinic.
Event date	The event date, as set in Viedoc Clinic when the event is initiated.
Activity Id	The activity ID, as set in the study design (in Viedoc Designer).
Activity name	The activity name, as set in the study design (in Viedoc Designer) and displayed in Viedoc Clinic.
Form Id	The form ID, as set in the study design (in Viedoc Designer).
Form name	The form name, as set in the study design (in Viedoc Designer) and displayed in Viedoc Clinic.
Form sequence number	Counter that identifies the instance of the respective form within the respective activity. This is mostly used for repeating forms.
	For non-repeating forms, this is <b>1</b> . If a form is reset and then saved again the new form has sequence number <b>2</b> , and so on.
	Form sequence number increases one step every time reset/initiate occurs.
	Review status information
Reviewed item	Can be one of the following:
	<ul> <li><i>Event date</i> - if the review action was performed on the event date.</li> <li><i>Form</i> - if the review action was performed at form level.</li> </ul>
Clinical review by	User name and user ID of the user that performed the clinical review.
Clinical review date (UTC)	The date and time in Coordinated Universal Time ( <u>UTC</u> ) when the clinical review was performed
Data review by	User name and user ID of the user that performed the data review (marked by the DM review flag).
Data review date (UTC)	The date and time (UTC) when the data review was performed.
SDV by	User name and user ID of the user that performed the Source Data Verification ( <u>SDV</u> ) (marked by the SDV review flag). For studies where SDV is performed on item level, this column will contain N/A for items that do not require SDV.
SDV date (UTC)	The date and time (UTC) when the SDV was performed. For studies where SDV is performed on item level, this column will contain N/A for items that do not require SDV.
Signed by	User name and user ID of the user that signed the form.
Signed date (UTC)	The date and time (UTC) when the form was signed by investigator.
	User name and user ID of the user that locked the form.
Lock by	



If, on the Data Export page, it was selected to include the <u>SDV</u> information, there is one separate sheet for the **SDV** information in the Excel export output file:

Activity name	Form Id	Form name	Form sequence number	Item Id	Item name	<b>Reviewed item</b>	SDV by	SDV date (UTC)
ActivityName	FormId	FormName	FormSeq	ItemId	ItemName	ReviewedItem	SdvBy	SdvDate
	PI	Patient Info	1	AGE	Age	Item	Demo User (317)	2017-11-17 12:26
	PI	Patient Info	1	DOB	Date of Birth	Item	Demo User (317)	2017-11-17 12:26
	PI	Patient Info	1	GENDER	Gender	Item	Demo User (317)	2017-11-17 12:26
	LABR	CBC LAB Results (Hematology)	1	LABR_RANGE	Normal Range	Item	Demo User (317)	2018-09-10 08:01
	LABR	CBC LAB Results (Hematology)	1	LABR_RESULT	Result	Item	Demo User (317)	2018-09-10 08:01
	LABR	CBC LAB Results (Hematology)	1	LABR_TYPE	Lab results type	Item	Demo User (317)	2018-09-10 08:01
	LABR	CBC LAB Results (Hematology)	1	LABR_UNIT	Unit	Item	Demo User (317)	2018-09-10 08:01
	LABR	CBC LAB Results (Hematology)	1	LABR_DATE	SampleDate	Item	Demo User (317)	2018-09-10 08:01
	PI	Patient Info	1	AGE	Age	Item	Demo User (317)	2018-09-10 08:00
	PI	Patient Info	1	DOB	Date of Birth	Item	Demo User (317)	2018-09-10 08:00
	PI	Patient Info	1	GENDER	Gender	Item	Demo User (317)	2018-09-10 08:00
• →   F	I LAB	PainLevel LABR Items	CodeLists Review st	atus SDV (+	) : 1			

Notel For studies where SDV is performed on item level, this sheet will include only the items that require SDV and are visible to the user.

The first columns provide information for identifying the item that was SDV-ed, followed by the review information, as listed in the following table:

Column name	Description	
Columns that identify the item		
Site sequence number	Counter that identifies the site globally within the study.	
Site name	The site name, as set in Viedoc Admin.	
Site code	The site code, as set in Viedoc Admin.	
Subject sequence number	Counter that identifies the subject within the site.	
Subject Id	The Subject ID, in the format configured in Viedoc Designer. The Subject ID is the subject identifier displayed in Viedoc Clinic on the subject card, subject details page, and so on.	
Event sequence number	Counter that identifies the event within the sequence of events for the same subject.	
Event Id	The event ID, as set in the study design (in Viedoc Designer).	
Event name	The event name, as set in the study design (in Viedoc Designer) and displayed in Viedoc Clinic.	
Event date	The event date, as set in Viedoc Clinic when the event is initiated.	
Activity Id	The activity ID, as set in the study design (in Viedoc Designer).	
Activity name	The activity name, as set in the study design (in Viedoc Designer) and displayed in Viedoc Clinic.	
Form Id	The form ID, as set in the study design (in Viedoc Designer).	
Form name	The form name, as set in the study design (in Viedoc Designer) and displayed in Viedoc Clinic.	

Column name	Description
Form sequence number	Counter that identifies the instance of the respective form within the respective activity. This is mostly used for repeating forms. For non-repeating forms, this is <b>1</b> . If a form is reset and then saved again the new form has sequence number <b>2</b> , and so on.
	Form sequence number increases one step every time reset/initiate occurs.
Item ID	The item ID, as set in the study design (in Viedoc Designer)
ltem name	The item name, as set in the study design (in Viedoc Designer) and displayed in Viedoc Clinic.
	SDV information
Reviewed item	<ul> <li>Can be one of the following:</li> <li><i>Event date</i> - if the review action was performed on the event date.</li> <li><i>Form</i> - if the review action was performed at form level.</li> </ul>
SDV by	User name and user ID of the user that performed the SDV.
SDV date (UTC)	The date and time (UTC) when the SDV was performed.



Exporting for SAS

# Exporting for SAS

Published by Viedoc System 2024-12-03

In Viedoc, it is possible to export data in a Statistical Analysis System (SAS) format, so that the data can be analyzed in SAS.

Importantl Only SAS in Unicode mode is supported.

To export data from Viedoc that is formatted for SAS, you have to make the following selections on the Data Export page, under **Output format**:

- In Output to, select CSV Comma-separated values
- Select to Include corresponding SAS script

**Notesl** 

- Linebreaks in paragraph text are converted to spaces when the output format is CSV.
- The option to Include corresponding SAS script is available only for CSV output, Group data by form, and 1 row per activity layout.

Output format			
Output to CSV 🔘	Group data by form 🛞 1 r	row per activity 🛞	
Output to: CSV -	Comma-separated values	¥	
Data grouping:	Group data by form *		
Layout	1 row per subject	• 1 row per activity	1 row per item
Include corres	ponding SAS script		
Output version:	Viedoc 4.39	٣	

The export output is a zip file, containing:

- A README text file with general information about:
  - The Viedoc output version (for details see Exporting data).
  - The time zones used for date/time fields.
  - The meaning of the signature, <u>only if the **Review status** was selected to be included in the export.</u>
- One CSV file for (the generated data sets match the sheets of the equivalent Excel export):
  - Each form in the exported data.
  - Items one Comma-Separated Values (<u>CSV</u>) file with general information about the items present in the exported data.
  - CodeLists one CSV file with general information about the code list items (radio button/dropdown/checkbox) in the exported data.
- Two SAS files:
  - \_RunMe.sas this is the file to be run in SAS in order to import the data.

• CSV2SAS.sas - this is a generic file, not study specific, that is used by the \_RunMe.sas file to convert the data to SAS format.

**Notel** If the Output IDs (OID) and Output labels have been defined in the study design, these are shown in the Excel/CSV/SAS export. If the Output IDs (OID) and Output labels are left undefined (blank) in the study design, then the configured Item ID and label is used. For more information about the item settings in the study design, see <u>Outputs and Validation</u>.

To import to SAS the data exported from Viedoc:

- 1 Export the data from Viedoc including the SAS script (the settings are described above).
- 2 Open SAS.
- 3 Run the **\_RunMe.sas** file (see description above).

The data types from the Items file and the CodeLists formats will be converted to the SAS formats.



Archiving a study

# Archiving a study

Published by Viedoc System 2021-11-24

<u>1. Introduction</u> <u>1.1 Prerequisite</u> <u>2. Archiving the study</u>

# 1 Introduction

When data collection at a study site has been confirmed and completed, each site should export and archive the study data and site-related documentation.

#### 1.1 Prerequisite

Site users must have the role permission to export data for the sites where the archiving should be performed. For more information, see the *Data export* lessons in <u>Viedoc Clinic User Guide</u>.

If Viedoc eTMF is used, see the following lesson eTMF-EMS repository.

# 2 Archiving the study

The following documentation is recommended to export when archiving a study at site. Export of data is still possible for locked studies.

- The user logs (available in PDF and Excel). For more information, see the User logs section in <u>Study start</u> page.
- The CRF data in all available formats (including all visits and forms). For each format, it is advisable to select the following:
  - Excel
- Queries, Query history, Review status, Medical coding, Uploaded files

Signed data 🔕 Not Signed data 🔕 SDV p	performed or NA 🚳 SDV pending 🕲 Queries 🕲 Query history 🕲 Review status 🕲 Medical coding
Signed data	✓ Not Signed data
SDV performed or NA	SDV pending
In addition to data, also include the follow	ing in the export (will not be included in Preview data)
Queries	Query history
Review status	Medical coding
🕑 Event dates	C Edit status
Uploaded files	Subject status
Pending forms	
Dutput format	
Output to Excel 🔕 Group data by form 🚳	1 row per activity
0	
Output to: Microsoft Excel - Office Open XM	
Data grouping: Group data by form V	

CSV

1 row per item

- Include history (will also include data that was reset or deleted)
- Queries, Query history, Review status, Medical coding, Uploaded files

Type of data	
	formed or NA 🚳 SDV pending 🕲 Queries 🕲 Query history 🕲 Review status 🕲 Medical coding 🕲
Uploaded files 🚳	
Signed data	✓ Not Signed data
SDV performed or NA	SDV pending
In addition to data, also include the following	in the export (will not be included in Preview data)
Queries	Query history
Review status	Medical coding
Event dates	Edit status
Uploaded files     Pending forms	Subject status
Pending forms	
Output format	
Output to CSV 🔕 Group data by form 🔕	1 row per item 💿
Output to: CSV - Comma-separated values *	
Data grouping: Group data by form V	
Layout O 1 row per subject	1 row per activity 1 row per item
Include history (will also include data that	t was reset or deleted)

#### CSV

- Include corresponding SAS script
- Queries, Query history, Review status, Medical coding, Uploaded files

Type of data Signed data SDV perf	Tormed or NA  SDV pending  Queries  Queries  Query history  Review status  Uploaded files
Signed data	✓ Not Signed data
SDV performed or NA	SDV pending
In addition to data, also include the following	in the export (will not be included in Preview data)     Query history   Medical coding    Edit status   Subject status
Output format Output to CSV  Group data by form	1 row per activity 🕥
Output to: CSV - Comma-separated values 🔻	
Data grouping: Group data by form *	
Layout O 1 row per subject	1 row per activity     1 row per item
Include corresponding SAS script	

- ODM
- Queries, Medical coding, Review status

Signed data	Vot Signed data
SDV performed or NA	SDV pending
addition to data, also include the follow	ring in the export (will not be included in Preview data)
Queries	
Review status	Medical coding
V Event dates	C Edit status
Subject status	
out format	
tput to XML	

- PDF
- Create PDF/A compliant archive

#### - Review status, Uploaded files

Signed data	✓ Not Signed data
SDV performed or NA	SDV pending
addition to data, also include the follow	ring in the export (will not be included in Preview data)
🕑 Queries	
Review status	
Uploaded files	
tput format	
utput to PDF	
utput to: PDF - Pdf Archive -	
	ms
utput to: PDF - Pdf Archive 🔻	ms

The data export in Viedoc supports all file formats that are required for archiving and regulatory purposes, including these formats:

- Portable Document Format Archive (<u>PDF/A</u>) an International Organization for Standardization (<u>ISO</u>)standardized version of the PDF format, specialized for archiving and long-term preservation of electronic documents.
- Office Open Extensible Markup Language (XML) a zipped, XML-based file format for spreadsheets (for example Excel), charts, presentations, and word processing documents.
- Statistical Analysis System (SAS) a format used for statistical analysis in the SAS software suite. A SAS script to import CSV datasets into SAS can be included in the CSV export.
- Operational Data Model (<u>ODM</u>) a vendor-neutral, platform-independent format for exchanging and archiving clinical research data, along with their associated metadata, administrative data, reference data, and audit information.



Medical coding

# Medical coding

Published by Viedoc System 2025-02-18

```
1. Introduction
2. Viedoc Coder
   2.1 Overview
    2.2 What do the symbols and colors mean?
3. Finding and applying a medical code
   3.3 A use case for coding with the MedDRA dictionary
       3.3.1 Searching for a code
       3.3.2 Selecting a code
        3.3.3 Applying a code
   3.4 A use case for coding with the WHO Drug Dictionary
       3.4.4 Searching for a code
       3.4.5 Selecting a code
       3.4.6 Applying a code
4. Approving the medical coding
   4.5 Rejecting the medical coding
   4.6 Resetting the medical coding
5. Exporting the medical coding
6. Auto coding
```

# 1 Introduction

Viedoc Coder allows you to code data, such as Adverse Events, Medical History, and Concomitant Medications, in a standardized way. You can access Viedoc Coder on the landing page.

The Viedoc Coder page displays metrics about coding, for example, the number and percentage of items that have been coded and approved. There is one set of metrics for each coding scope. The metrics displayed are based on the data and sites that you have permission to view.

Note! You can only access Viedoc Coder if permission to view, perform, and/or approve medical coding is activated for your role. If you do not see the medical coding icon, you do not have a role with medical coding permissions.

2 Viedoc Coder

# 2.1 Overview

1. To open Viedoc Coder select the **dictionary icon**:

	test study			Launch
i 🗠				ē
Study st	tatus			
All sites Sw				
Issues			My statistics	Messages
Resolved queries	s Open queries	Forms	Patients added: 6	<ul> <li>Consider changing your password. Your password will expire in 3 days. To change password, select</li> </ul>
0	0	0	FPA: 28 SEP 2023	4 days ago by System
Ŭ	Ŭ	Ŭ	LPA: 11 OCT 2023	View all messages
Review				
	DM %	SDV %		
CRA %	0	0		
CRA %	U			
CRA % O Approval	U			
0	Queries %	Locked forms %		

Viedoc Coder opens in a new window:

viedoc coder"	Demo new co	oder	8
All countries 👃 All sites 👃			
Adverse event			
Coded data 9 of 11 items		pproved data	
9 of hittems		of 11 items	
81% Sitems auto coded 1 items manually coded	(	0%	
Open medical coding $\rightarrow$			
Concomitant medication			
Coded data O of 5 items		oproved data of 5 items	
0%	(	0%	
Open medical coding $\rightarrow$			
Concomitant medication ATC			
Coded data 1 of 5 items		oproved data of 5 items	
20% Items auto coded 0 items manually coded	(	0%	
Open medical coding $\rightarrow$			
Medical history			
Coded data 0 of 7 items		oproved data of 7 items	
0%	(	0%	
Open medical coding $\rightarrow$			
¢	Viedoc Technologies AB 2024 · Tern Viedoc™ version 4.80.9054.17078 ·		

2. Select **Open medical coding** on a scope:

viedoc coder	Viedoc Coder	DEV3STUDY DEV3STUDY
Sweden 🗼 All sites 🔱		
Adverse Events		
Coded data 4 of 5 items	Approved data o of 5 items	
80%	0%	
Open medical coding →		
WHODrug		
Coded data 2 of 2 items	Approved data o of 2 items	
100%	0%	
Open medical coding →		
	viedoc	
	© Viedoc Technologies AB 2024 • Terms of use • Privacy policy Viedoc™ version 8840.20938.0.0 • 2024-03-15714.44 UTC	

Viedoc Coder displays a table that lists all items to be coded in the Value column.

Adverse Events ↓		Ļ					
All items 4							
	, Q Search 5	6			Find	i and apply code	
Subject ID 💲 😨	Value 👻	Code		\$	Medi	DRA	Only current
SE-999-001	headache	Anaphylaxis treatment	×		Se	arch options	
SE-S1-002	Headache	Anaphylaxis treatment	x			Search	
SE-S1-003	A	Acute anaphylaxis	×		L.	, Search	
SE-S2-001	Headache				SOC	Select	
SE-S2-002	с	Systemic anaphylaxis	×		HLGT	Select	
					HLT	Select	
					PT	Select	Ļ
					LLT	Select	4
					ſ		
					-	Add additional comments	
					Ĩ	ad doutional comminuts	
						Apply to	selected items (0)
					Clear		

In Viedoc Coder, you can:

- **1**. Select the coding scope (the data) to be coded.
- 2. Select to display items from all countries or from an individual country.
- 3. Select to display items from all sites or from an individual site.

4. Select to display all uncoded (and rejected) items, all coded items, all approved items, or all items.

5. Perform a text search among all values of the items.

6. If configured for your study, there can be additional columns included with supporting values for the coding, for example route, indication, or other.

7. Find and apply codes (see Finding and applying a medical code).

8. Select here to change the settings of Viedoc, access the help center, or logout of Viedoc.

When applying codes, it is possible to:

- Add a comment - an interpretation or explanation of the value that you have assumed in order to code.

See Finding and applying a medical code.

### 2.2 What do the symbols and colors mean?

In Viedoc Coder, you can find the following symbols:

Add multiple codes to one value.

viedoc o	oder	Viedoc Coder		
Adverse Event	s ↓ Sweden	↓ All sites ↓		
All items	↓ Q Search		6	7
Subject ID 💲 ਵ	Value 2 🤿	Code	٠	
SE-999-001	abdominal obstruction 4 🗸	Anaphylaxis treatment 8 ×		
SE-S1-002	Headache	Anaphylaxis treatment X		
SE-S1-003	A	<sup>1</sup> Band-like headache <sup>2</sup> Adrenal disorder		
SE-S2-001	Headache			
SE-S2-002	с	1 Band-like headache 2 Adrenal disorder		

1. The three horizontal lines is a filter function. Click the symbol to open a dropdown list with a search field and a list of selectable items.

2. Fields have a sorting function which will list its contents in ascending and descending order. This function is not available for all columns.

3. A numbered list in the code field means that there is more than one medical code applied to that value.

4. An orange pen icon in the value field, together with a light orange background in the code field, means that the value (form item) has been changed in Viedoc Clinic by the Investigator after the item was coded. The applied code may not be correct anymore and the item should be re-coded.

5. A clip icon in the code field means that an interpretation has been added. Move the mouse pointer over the clip icon to view the contents of the interpretation.

6. An activated tick mark indicates that the coding has been approved.

7. The checkbox is used to mark the values to which a selected code should be applied.

8. The white cross in a grey circle is used to delete the applied code.

# 3 Finding and applying a medical code

This section gives an example of medical coding of adverse events using the Medical Dictionary for Regulatory Activities (MedDRA) and an example of medical coding of concomitant medication using the World Health Organization Drug Dictionary (WHO DD). The coding procedure is similar even if you are using other types of dictionaries.

### 3.1 A use case for coding with the MedDRA dictionary

#### 3.1.1 Searching for a code

To find a code that you want to apply to a value, use the Find and apply code section.

There are three search options available:

- Contains the search will return all entries that contain the text typed in the search field. This is the default option.
- Begins with the search will return all entries that begin with the text typed in the search field.
- Exact match the search will return all entries that exactly match the text typed in the search field.

You can search for codes or (substrings of) terms in the **Search** field. Codes matching the term will be listed in a dropdrown list that deploys from the **Search** field. If a term is linked to multiple System Organ Classes (SOCs), the code that links to the primary SOC is displayed in black, while the codes that link to secondary SOCs are displayed in grey.

Searching is not case sensitive. If you type in "Anaphylaxis", the search can return results such as "anaphylaxis" and "Anaphylaxis".

viedoc coc	ler	Viedoc Coder		DEV3STUDY DEV3STUDY
MedDRA	↓ Sweden ↓ /	All sites		
Uncoded items	↓ Q Search			Find and apply code
Subject ID 🐧 🚖	Value 👻	Code		MedDRA Only current items
SE-999-001	abdominal obstruction			Search options
SE-S1-002	Headache			Contains Begins with Exact match
SE-S1-003	A			
SE-S2-001	Headache			Q anaphylaxis
SE-S2-002	с			LLT 10000664 Acute anaphylaxis (IMMUN)
				LLT 10000664 Acute anaphylaxis (VASC)
				LLT 10002218 Anaphylaxis (IMMUN)
				LLT 10002218 Anaphylaxis (VASC)
				LLT 10049090 Anaphylaxis prophylaxis (SURG)
				LLT 10002222 Anaphylaxis treatment (SURG)
				LLT 10060689 Exercise-induced anaphylaxis (IMMUN)
				LLT 10060689 Exercise-induced anaphylaxis (VASC)
				LLT 10042931 Systemic anaphylaxis (IMMUN)
				LLT 10042931 Systemic anaphylaxis (VASC)
				PT 10049090 Anaphylaxis prophylaxis (SURG)
				PT 10002222 Anaphylaxis treatment (SURG)
Rows: 6				

You can also search a code by selecting the System Organ Class (SOC), High Level Group Term (HLGT), High Level Term (HLT), Preferred Term (PT) and Low Level Term (LLT) using the dropdown lists below the search field.

By default, the search returns low level terms (LLTs) that have the status 'current' in the <u>MedDRA</u> dictionary. It is possible to search among non-current MedDRA codes (that is, terms that are vague, ambiguous, truncated, abbreviated, out-dated, or misspelled and thus no longer used), by clearing the checkbox for **Only current items**.

	der	Viedoc Coder	DEV3STUDY DEV3STUDY
MedDRA	↓ Sweden ↓	All sites 🗸	
Uncoded items	4 Q Search		Find and apply code
bject ID 🐧 🔫	Value 👻	Code	MedDRA Only current items
999-001	abdominal obstruction		Search options
S1-002	Headache		Contains Begins with Exact match
51-003	A		
52-001	Headache		Q anaphylaxis
\$2-002	c		SOC 10021428 Immune system disorders
			HLGT 10001708 Allergic conditions
			HLT 10077535 Anaphylactic and anaphylactoid respons ↓
			PT 10002198 Anaphylactic reaction 4
			LLT 10002218 Anaphylaxis
			10054843 Anaphylactic reaction to food 10063979 Anaphylactic reaction to vaccine
			10063979 Anaphylactic reaction to vaccine
			Ad 10073013 Anaphylactic reaction to venom
			10002218 Anaphylaxis
			10060689 Exercise-induced anaphylaxis
			Add and Clear 10042930 Systemic anaphylactic reaction
			10042931 Systemic anaphylaxis

#### 3.1.2 Selecting a code

Select the code you would like to apply. The details of this code appear in the fields below the search field.

You can select to use the Preferred Term (PT) or the Low Level Term (LLT) by clicking one of the blue radio buttons next to the **PT** and **LLT** fields, as shown below:

viedoc coc	ler	Viedoc Coder	DEV3STUDY DEV3STUDY
MedDRA	↓ Sweden ↓	All sites 🗸	
Uncoded items	↓ Q Search		Find and apply code
Subject ID 💲 🔫	Value 👻	Code	MedDRA Only current items
SE-999-001	abdominal obstruction		Search options
SE-S1-002	Headache		Contains Begins with Exact match
SE-S1-003	A		
SE-S2-001	Headache		Q, anaphylaxis
SE-S2-002	С		SOC 10021428 Immune system disorders
			HLGT 10001708 Allergic conditions
			HLT 10077535 Anaphylactic and anaphylactoid respons ↓
			PT 10002198 Anaphylactic reaction
			LLT 10002218 Anaphylaxis
			LLT 10002218 Anaphylaxis (IMMUN)
			Add additional comments
			Apply to selected items (0)
			Add another code
			Clear
Rows: 5			

If you would like to add more than one code to the same value, click **Add another code**. If you would like to add an interpretation, that is, a comment or explanation of the selected code, click **Add interpretation** and type your interpretation in the field. You can reset your selections by clicking **Clear**.

Tou curreset your selections by clicking **clear**.

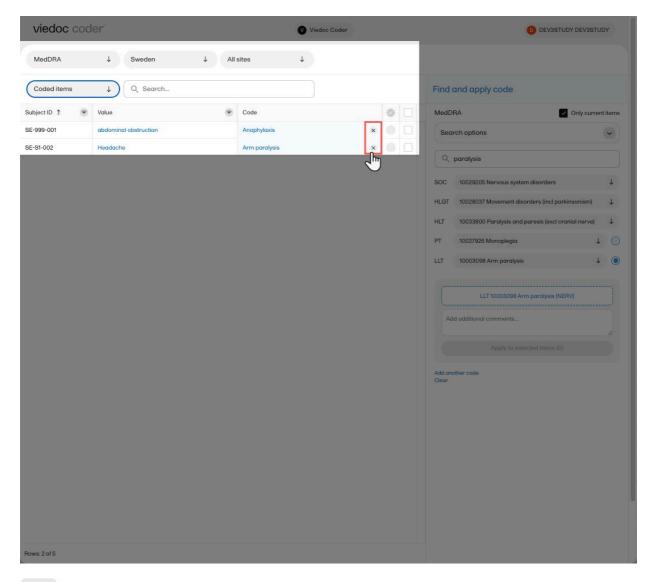
Tip! If you want to apply a code that has been used before, click that code in the left side of the table. The **Find and apply code** section is then automatically populated with the selections for that code.

#### 3.1.3 Applying a code

To apply a selected code, select the checkboxes for the value or values you want to apply that code to, and click **Apply to selected**. The selected code will be applied to the selected subjects and values.

		Vied	oc Coder	DEV3S	TUDY DEV3STUDY
MedDRA	↓ Sweden ↓	All sites ↓			
Uncoded items	↓ Q Search			Find and apply code	
Subject ID 💲 🛛 🖶	Value =	Code	0 5	MedDRA	<ul> <li>Only current item</li> </ul>
E-999-001	abdominal obstruction			Search options	^
E-S1-002	Headache		•	Contains Begins with	Exact match
E-S1-003	A		•		2xdot maton
E-S2-001	Headache				
E-S2-002	С			SOC 10021428 Immune system disorders	s ↓
				HLGT 10001708 Allergic conditions	Ļ
				A	
				HLT 10077535 Anaphylactic and anaphy	
				PT 10002198 Anaphylactic reaction	↓ (
				LLT 10002218 Anaphylaxis	↓ (
				<u> </u>	
				LLT 10002218 Anaphylaxis (I)	MMUN)
					)
				Add additional comments	
				Apply to selected items	(1)
				Add another code	ii 6 (1)
					) (1)
				Add another code	(1)
				Add another code	(I)
				Add another code	(I)
				Add another code	(1)
				Add another code	(f)
				Add another code	(1) (1)
				Add another code	(I)

Notel You can remove an applied code by clicking the cross icon to the right of the applied code.



### 3.2 A use case for coding with the WHO Drug Dictionary

3.2.1 Searching for a code

To find a code that you want to apply to a value, use the Find and apply code section.

When using the <u>WHO DD</u>, you can select to search by:

- Drugs to search for drugs by their name. This is the default option.
- Active ingredients to search for drugs by their active ingredients. You can enter multiple ingredients in the search field, separated by ; and the search will return all drugs that contain all specified ingredients.

There are three search options available:

- **Contains** the search will return all entries that contain the text typed in the search field. This is the default option.
- Begins with the search will return all entries that begin with the text typed in the search field.
- Exact match the search will return all entries that exactly match the text typed in the search field.

viedoc o	oder				Viedoc Coder			EV3STUDY
WHODrug	↓ Sweden		↓ All site	s J				
All items	↓ Q Search						Find and apply code	
Subject 🐧 ਵ	Value	<del>.</del> .	& 1 📼	& 2 🔫	Code		WHODrug	
SE-S2-001	Ibuprofen	n	n/a	n/a	Aceclofenac;Paracetamol;Serrape x ptase;Tizanidine		Search options	•
SE-S2-002	Ibuprofen	n	n/a	n/a	Aceclofenac;Paracetamol;Serrape × ptase;Tizanidine		Drugs Active ingredients	
							Contains Begins with Exact match	
							Q Search	
							Pref	
							Drug	
							Spec	
							Ingr	
							Cntr Select	4
							MAH Select	
							Form Select	t)
							Str Select	*
							ATC	<b>→</b>
							Gen - MPID -	
							Add additional comments	

You can search for codes or (substrings of) terms in the **Search** field. Codes matching the term will be listed in a dropdrown list that deploys from the **Search** field.

Searching is not case sensitive. If you type in "paRacetaMol", the search can return results such as "paracetamol" or "Paracetamol".

The number behind the entries in the list depicts the number of active ingredients. If you hover the cursor over the number, a dialog box appears that lists the active ingredients.

	oder					Viedoc Coder		D DEV3STUDY DEV3STUDY
WHODrug	Ļ	Sweden	¥	All sites	$\downarrow$			
All items	Ļ	Q Search						Find and apply code
bject ID 🂲 👻	Value		& 1	Ŧ	& 2 =	Code	0	WHODrug
-S2-001	Ibuprofen		n/a		n/a	Aceclofenac;Paracetamol;Serrapep × tase;Tizanidine		Search options
-S2-002	Ibuprofen		n/a		n/a	Aceclofenac;Paracetamol;Serrapep × tase;Tizanidine		Drugs      Active ingredients
								Contains Begins with Exact match
								Q pAraCetamoL
								Showing a subset
								13829801001 Aceclofenac; Chlorzoxazone; Paracetamol 3 (M03BB)
								14599201001 Aceclofenac;Chymotrypsin;Paracetamol (N02BE) 3
								13840601001 Aceclofenac;Chymotrypsin;Paracetamol;Trypsin (M01AB)
								13841101001 Aceclofenac;Paracetamol (N02BE) 2
								13841101001 Aceclofenac;Paracetamol (N028E)         2           12501901001 Aceclofenac;Paracetamol;Rabeprazole (N028E)         3
								12501901001 Aceclofenac;Paracetamot;Rabeprazole (N02BE) 3 12501902001 Aceclofenac;Paracetamot;Rabeprazole sodium 3 (N02BE) Serrapeptose
								12501901001 Aceclofenac;Paracetamol;Rabeprazole (N02BE) 3 12501902001 Aceclofenac;Paracetamol;Rabeprazole sodium 3
								12501901001 Aceclofenac;Paracetamol;Rabeprazole (N02BE) 3 12501902001 Aceclofenac;Paracetamol;Rabeprazole sodium 3 (N02BE) Sarrapeptase 13842901001 Aceclofenac;Paracetamol;Serrapeptase (M. Aceclofenac
								12501901001 Aceclofenac;Paracetamol;Rabeprazole (N02BE) 3 12501902001 Aceclofenac;Paracetamol;Rabeprazole sodium 3 (N02BE) Serrapptose 13842901001 Aceclofenac;Paracetamol;Serrapeptase (M Aceclofenac Paracetamol 1250 W01001 4
								12501901001 Aceclofenac:Paracetamol;Rabeprazole (N02BE)       3         12501902001 Aceclofenac:Paracetamol;Rabeprazole sodium       3         (N02BE)       Serrapeptase         13842901001 Aceclofenac;Paracetamol;Serrapeptase (M Aceclofenac;Paracetamol;Serrapeptase (M Aceclofenac;Paracetamol;Serrapeptase,Tizonidine (N02BE)       4         12501401001       Aceclofenac;Paracetamol;Serrapeptase,Tizonidine (N02BE)       4
								12501901001 Aceclofenac;Paracetamol;Rabeprazole (N02BE)       3         12501902001 Aceclofenac;Paracetamol;Rabeprazole sodium       9         12501902001 Aceclofenac;Paracetamol;Rabeprazole sodium       9         13842901001 Aceclofenac;Paracetamol;Serrapeptase       MacAditer         12501401001       Aceclofenac;Paracetamol;Serrapeptase,Tizanidine (N02BE)       4         12501401001       Aceclofenac;Paracetamol;Serrapeptase,Tizanidine (N02BE)       4         12501401001       Aceclofenac;Paracetamol;Serrapeptase,Tizanidine (N02BE)       4         12501402001 Aceclofenac;Paracetamol;Serrapeptase,Tizanidine (N02BE)       4         12501402001 Aceclofenac;Paracetamol;Serrapeptase,Tizanidine (N02BE)       4         12501402001 Aceclofenac;Paracetamol;Serrapeptase,Tizanidine (N02BE)       4         12501402001       126014020E       4
								12501901001 Aceclofenac;Paracetamol;Rabeprazole (N02BE)       3         12501902001 Aceclofenac;Paracetamol;Rabeprazole sodium       9         12501902001 Aceclofenac;Paracetamol;Rabeprazole sodium       9         13842901001 Aceclofenac;Paracetamol;Serrapeptase       MacAditer         12501401001       Aceclofenac;Paracetamol;Serrapeptase,Tizanidine (N02BE)       4         12501401001       Aceclofenac;Paracetamol;Serrapeptase,Tizanidine (N02BE)       4         12501401001       Aceclofenac;Paracetamol;Serrapeptase,Tizanidine (N02BE)       4         12501402001 Aceclofenac;Paracetamol;Serrapeptase,Tizanidine (N02BE)       4         12501402001 Aceclofenac;Paracetamol;Serrapeptase,Tizanidine (N02BE)       4         12501402001 Aceclofenac;Paracetamol;Serrapeptase,Tizanidine (N02BE)       4         12501402001       126014020E       4
								12501901001 Aceclofenac;Paracetamol;Rabeprazole (N02BE)       3         12601902001 Aceclofenac;Paracetamol;Rabeprazole sodium       3         12602BE)       Serragnation         13842901001 Aceclofenac;Paracetamol;Serrapeptase (Mathematication)       Paracelofenac;Paracetamol;Serrapeptase,Tizonidine (N02BE)         1260140201 Aceclofenac;Paracetamol;Serrapeptase,Tizonidine (N02BE)       4         12601402001 Aceclofenac;Paracetamol;Serrapeptase,Tizonidine (N02BE)       4         12601402001 Aceclofenac;Paracetamol;Serrapeptase,Tizonidine (N02BE)       4         12631402001 Aceclofenac;Paracetamol;Thiocolchicoside (M03BE)       3         13837401001 Aceclofenac;Paracetamol;Thiocolchicoside (M03BE)       3

#### 3.2.2 Selecting a code

Select the code (drug) you would like to apply. The details of this drug will appear in the fields below the search field.

In the <u>WHO DD</u>, all drugs have a preferred drug. You can select to use the Preferred drug (Pref) or the Drug name by clicking one of the blue radio buttons next to the **Pref** and **Drug** fields. **Drug** is the default.

Notel When exporting medical coding, both the preferred drug and drug name are included in the export (in separate columns). But if you select to apply **Pref** while coding, the preferred name ends up in both columns in the export. This is to provide consistency for the data managers, so that they only have to look in one column to find their data.

riedoc d	coder						Viedoc Coder		DEV3STUDY DEV3STUDY
VHODrug	Ļ	Sweden	Ļ	All sites		↓			
ull items	Ļ	Q Search							Find and apply code
ect ID 🂲 🖶	Value		& 1		& 2	۲	Code	4	WHODrug
62-001	Ibuprofen		n/a		n/a		Aceclofenac;Paracetamol;Serrapep x tase;Tizanidine		Search options
\$2-002	Ibuprofen		n/a		n/a		Aceclofenac;Paracetamol;Serrapep × tase;Tizanidine		Q pAraCetamoL
									Pref 12501902001 Aceclofenac;Paracetamol;Rabeprazole
									Drug 12501902001 Aceclofenac;Paracetamol;Rabeprazole
									Spec
									Aceclofenac;Paracetamol;Rabeprazole sodium
									Cntr N/A Not Applicable
									MAH None .
									Form Unspecified .
									Str Unspecified .
									ATC N02BE Anilides X
									Gen Generic
									MPID 3881013
									12501902001 Aceclofenac;Paracetamol;Rabeprazole sodium (MPID 3881013)
									Add additional comments
									Apply to selected items (0)
									Add another code Clear

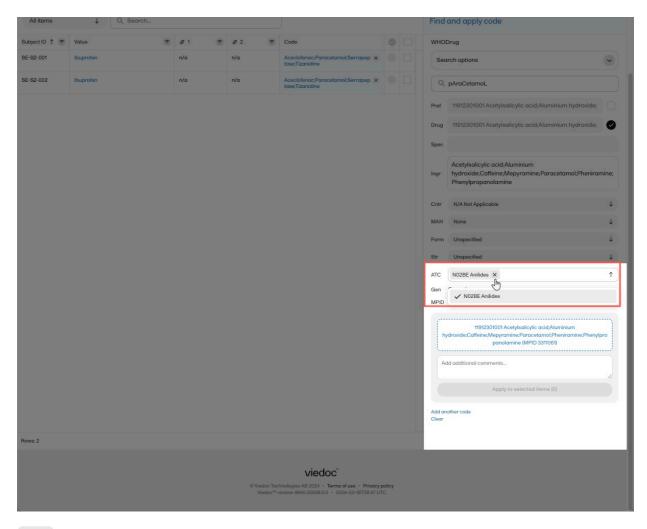
Use the dropdown lists to select Country (Cntr), Marketing Authorization Holder (MAH), Pharmaceutical Form (Form), Strength (Str), or Medicinal Product ID (MPID), if applicable.

If you would like to add more than one code to the same field, click **Add another code**. If you would like to add an interpretation, that is, a comment or explanation of the selected code, click **Add interpretation** and type your interpretation in the field. You can reset you selections by clicking **Clear**.

Tip! If you want to apply a code that has been used before, click that code in the left side of the table. The **Find and** 

apply code section is then automatically populated with the selections for that code.

If you selected a drug that carries multiple Anatomic Therapeutic Chemical Classification System (<u>ATC</u>) codes, all ATC codes will be displayed in the **ATC** field. You can define whether to include all ATC codes in the coding or only a selection. Select the ATC code to include it or select the X icon to remove an ATC code.



### 3.2.3 Applying a code

To apply a selected code, select the checkboxes for the value or values you want to apply that code to, and click **Apply to selected**. The selected code will be applied to the selected subjects and values.

viedoc o	coder			Viedoc Coder		D DEV3STUDY DEV3STU	DY
WHODrug	↓ Sweden	↓ All sites	Ļ				
All items	↓ Q Search					Find and apply code	
Approve selecte	ed (1) Reject selected Reset selected	d				WHODrug	
ubject ID 🂲 ਵ	Value (=	& 1 =	& 2 =	Code	08	Search options	~
E-S2-001	Ibuprofen	n/a	n/a	Aceclofenac;Paracetamol;Serrapep x tase;Tizanidine	•	Q paracetamol	
-S2-002	Ibuprofen	n/a	n/a	Aceclofenac;Paracetamol;Serrapep 🗴 tase;Tizanidine	• •	Pref 13617601001 Acetylsalicylic acid;Ascorbic acid;Parace	
						Drug 13617601001 Acetylsalicylic acid;Ascorbic acid;Parace	Ø
						Spec	
						Acetylsalicylic acid;Ascorbic acid;Paracetamol	
						Cntr N/A Not Applicable	Ŷ
						MAH None	↓
						Form Unspecified	↓
						Str Unspecified	↓
						ATC N02BE Anilides ×	↓
						Gen Generic MPID 3739981	
						13677601001 Acetylsalicytic oxid:Ascorbic oxid:Paracetamol (MPIC 3739881)         Add additional comments         Apply to selected items (1)         Add another code         Clear	

You can remove an applied code by clicking the cross icon to the right of the applied code.

# 4 Approving the medical coding

After applying codes to the items, it is possible to approve/reject/reset the items as shown in the below table.

Action	Current state/found in list	New state/found in list
Approve	Coded Rejected	Approved items
Reject	Coded Approved	Uncoded items
Reset	Approved Rejected	Coded items

Tip! To see all items in one list, select the filter All items.

To approve items that have been coded:

Select the item(s) that you want to approve and click Approve selected.

Coded iter		rch						
Approve sel		Reset selected						
	2 m	eset selected		& 2	۲	Code	ø	6
	2 m		۲	ළි 2 n/a	۲	Code Aceclofenac:Paracetamol;Serra x peptase;Tizanidine	0	6

The selected item(s) now disappear from the list and are found with the blue "Approved" symbol in the Approved items list.

Approved items	Ļ	Q Search					
Subject ID 💲 🥃	Value	۲	<i>®</i> 1 =	& 2	Code		
SE-S2-001	Ibuprofen		n/a	n/a	Aceclofenac;Paracetamol;Serrapepta × se;Tizanidine	۲	

Tip! The metrics of the medical coding that have been approved can be seen on the landing page:

viedoc coder"	Viedoc Coder	DEVOSITUDI DEVOSITUDI
Swoden 4 Atolios 4		
Adverse Events		
Coded data 3 of 5 items	Approved data 0 of 5 items	
60%	0%	
Open medical coding +4		
WHODrug		
Coded data 2 of 2 iterns	Approved data 1 of 2 Parms	•
100%	50%	
Open medical coding ->		
	viedoc'	
	6 Viedoc Technologies AB 2024 - Terms of use - Privacy policy Viedoc <sup>19</sup> vension 8940/20598.0.0 - 3029-00-48T0853 UTC	

## 4.1 Rejecting the medical coding

To reject items that have been coded:

1 Select the items that you want to reject and select **Reject selected**.

Coded items	↓ Q Sear	ch				
Approve selected	J	Reset selected				
ubject ID 💲 🤫	Value		<i>₽</i> 1 👻	e 2	₹ Code	
E-S2-002	Ibuprofen		n/a	n/a	Aceclofenac;Paracetamol;Serrapepta x se;Tizanidine	•

2 The selected item(s) now disappear from the list and are found with the red "rejected" symbol in the Uncoded items list for re-evaluation.

Uncoded items	↓ Q Searc	h							
Subject ID 💲 👳	Value	۲	& 1	۲	& 2	۲	Code		
SE-S2-002	Ibuprofen		n/a		n/a		Aceclofenac;Paracetamol;Serrapepta x se;Tizanidine	0	

1

2

## 4.2 Resetting the medical coding

To reset items that have been approved or rejected:

1 Select the item(s) that you want to reset and click Reset selected.

viedoc co	oder					Viedoc Coder		
WHODrug	↓ Sweden	Ļ	All sites	1				
Uncoded items	↓ Q Search							
Approve selected	(1) Reject selected Rese	tsejected						
Subject ID 💲 🥃	Value	<del>.</del> 6	91 ₹	& 2	₹	Code	٥	
E-S2-002	Ibuprofen	n	α	n/a		Aceclofenac;Paracetamol;Serrapepta x se;Tizanidine	0	

2 The selected item(s) now disappear from the list and are found in the Coded items list without the approved/rejected flag.

viedoc co	oder					Viedoc Coder		
WHODrug	↓ Sweden	↓ All s	ites		Ļ			
Coded items	↓ Q Search							
Subject ID 💲 👻	Value	@ 1		& 2		Code	0	
SE-S2-002	Ibuprofen	n/a		n/a		Aceclofenac;Paracetamol;Serrapepta × se;Tizanidine	۲	

# 5 Exporting the medical coding

It is possible to export medical coding using Viedoc's data export feature, for more information, see Exporting data.

All subjects (29)		+
ents and time period		+
orms and items All forms 🕲		÷
pe of data	formed or NA 🚳 SDV pending 🔕 Medical coding 🚳	-
<ul> <li>Signed data</li> <li>SDV performed or NA</li> </ul>	<ul> <li>✓ Not Signed data</li> <li>✓ SDV pending</li> </ul>	
SDV performed or NA		

To export the medical coding, select the checkbox in front of Medical coding in the Type of data section.

For more information about how medical coding is exported, see:

- Medical coding in ODM export
- Medical coding in Excel export

Note! You can only export medical coding if permission to export data is activated for your role. If you do not see the data export icon, you do not have a role with export permissions.

# 6 Auto coding

In Viedoc Coder, you can choose to enable auto coding.

We support auto coding for the MedDRA and ATC dictionaries. Auto coding can be enabled and disabled for individual scopes within the MedDRA/ATC terminology. Currently, auto coding includes an exact match to MedDRA, any language and ATC.

Note! MedDRA-J is scheduled to be included in the future.

Note! By default, auto coding is disabled for ongoing studies and enabled for new studies. However, it can be disabled for new studies. The auto coding setting is always available in Viedoc Admin, however is only functional for the new Viedoc coder and not the old Viedoc Coder console. If you wish to update to the new Viedoc Coder, please contact your Viedoc representative.

When auto coding is enabled, all existing uncoded items will be auto coded and all new items will be auto coded without any manual steps. However, items that are auto coded without a match will be flagged, and will need to be manually coded.

An auto coded item is indicated within the table for coded items:

- A = auto coded with a match
- ! = auto coded without match and needs to be manually coded.

Concomitant medic	Concomitant medica ↓ All countries ↓ All sites ↓								
All items	↓ Q Search								
Subject ID 💲 📼	Value	@ 1 👳	Code	S 🔹 🕻					
DK-CH-001	cortisone	exanthema		!					
SE-SH-001	Levocetirizine	allergy	levocetirizine ×	A					
SE-UA-001	Bricanyl	Asthma		!					
SE-UA-002	Aspirin	Headache		!					
SE-UA-005	2			!					

Back to top of page



#### Medical coding version 4.78 and earlier

## Medical coding version 4.78 and earlier

Published by Viedoc System 2024-06-27

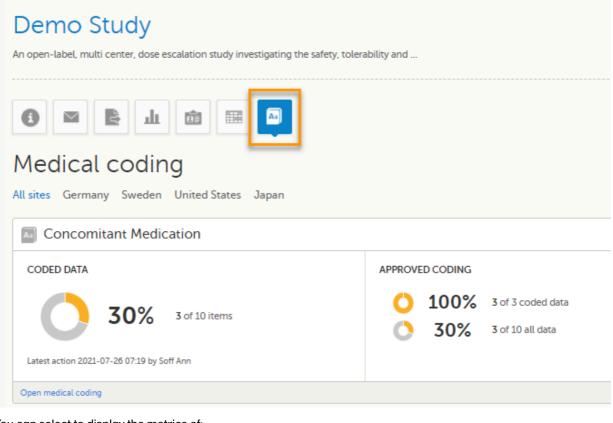
**1. Introduction** 2. The Viedoc Coder console in Viedoc Clinic 2.1 Overview of the medical coding console 2.2 What do the symbols and colors mean? 3. Finding and applying a medical code 3.3 A use case for coding with the MedDRA dictionary 3.3.1 Searching for a code 3.3.2 Selecting a code 3.3.3 Applying a code 3.4 A use case for coding with the WHO Drug Dictionary 3.4.4 Searching for a code 3.4.5 Selecting a code 3.4.6 Applying a code 4. Approving the medical coding 4.5 Disapproving the medical coding 4.6 Resetting the medical coding 5. Exporting the medical coding

# 1 Introduction

Viedoc Coder allows you to code data, such as Adverse Events, Medical History, and Concomitant Medications, in a standardized way. You can access Viedoc coder on the landing page.

The Viedoc Coder page displays metrics about coding that tell the user the number and percentage of items that have been coded and approved. There is one set of metrics for each coding scope. The metrics displayed are based on the data and sites that you have permission to view.

Note! You can only access Viedoc Coder if permission to view, perform, and/or approve medical coding is activated for your role. If you do not see the medical coding icon, you do not have a role with medical coding permissions.



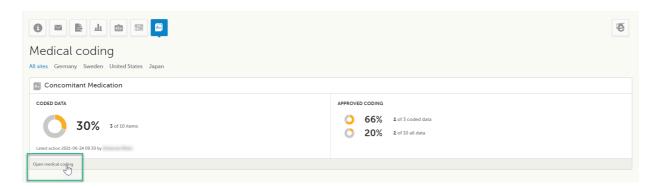
You can select to display the metrics of:

- All sites
- All sites in an individual country
- An individual site

# 2 The Viedoc Coder console in Viedoc Clinic

2.1 Overview of the medical coding console

To enter the medical coding console, click Open Viedoc Coder in the lower left corner of the coding scope.



The Viedoc Coder console opens in the same window:

All ite	ded items	Search 5	(					Find and apply code
	ed items	Value	≡ @1 ≡	@ 2 ≡	Code		$\odot$	WHODrug
Appr	oved Items	Atorvastatin	Tablet	Oral	Amlodipin/Atorvastatin Teva	۵	$\odot$	Search options
All ite	ems	ASA	Tablet	Oral	5 asa	۲		Search
5	DE-95-010	Paracetamol	Tablet	Oral				Pref
	DE-95-013	paracetamol	Capsule	Oral				Drug
	DE-95-031	paracetamol	Cream	Intraocular				INGR
5	DE-96-006	Ibuprofen	Tablet	Oral	Alben ibuprofen	۲	۲	ATC -
	DE-96-006	Paracetmol	Injection	Oral				GEN 🕑
8	DE-96-017	aspirin	Capsule	Nasal				Show variants >>
	DE-96-112	Ibuprofen	Tablet					
0	US-30-025	Alvedon						Apply to selected (0)
								Appiy to selected (u)
								 Add interpretation Clear

The Viedoc Coder console displays a table that lists all items to be coded in the **Values** column. You can view the corresponding form (Electronic Case Report Form (<u>eCRF</u>)) of an item by clicking on the value.

On the Viedoc Coder console, you can:

- 1. Select the coding scope (that is, data) to be coded.
- 2. Select to display items from all countries or from an individual country.
- 3. Select to display items from all sites or from an individual site.
- 4. Select to display all uncoded (and disapproved) items, all coded items, all approved items, or all items.
- 5. Perform a text search among all values of the items.

6. If configured for your study, there can be additional columns included with supporting values for the coding, for example route, indication, or other.

7. Find and apply codes (see Finding and applying a medical code).

When applying codes, it is possible to:

- Add an interpretation a comment or explanation of the value that you have assumed in order to code.
- Add multiple codes to one value.

See Finding and applying a medical code.

### 2.2 What do the symbols and colors mean?

fst-	Medical coding	/ A demo study						Close
A	Adverse events	s • Al	l countries		Al	l sites		•
All	items	Search	Found 12 data items.	6	7	Find	and apply code	
#	Subject ID ≡	Value ⊽ =	Code	$\odot$		MedD	RA	<ul> <li>Only current item</li> </ul>
1	NL-VUA-018	Headache	Migraine headache 5 Ø 🛛			Searc	ch options	
2	SE-AHU-054	Fever and headache	1 Band-like headache			Searc	ch	
3	SE-AHU-058	Allergic reaction, anaphylaxis		8		SOC	Select	
4	SE-AHU-059	Fever 4	Fever of unknown origin	-		HLGT	Select	•
5	SE-AHU-062	Vertigo	Acute rotatory vertigo			HLT	Select	
6	SE-AHU-063	Headache	Forehead headache		0	PT	Select	• ) C

On the Viedoc Coder console, you can find the following symbols:

1. The three horizontal lines is a filter function. Click the symbol to open a drop-down list with a search field and a list of selectable items.

2. A filter symbol indicates that a selection has been made and the column only displays your filtered items.

3. A numbered list in the code field means that there is more than one medical code applied to that value.

4. An orange pen icon in the value field, together with a light orange background in the code field, means that the value (form item) has been changed in Viedoc Clinic by the Investigator after the item was coded. The applied code may not be correct anymore and the item needs to be re-coded.

5. A clip icon in the code field means that an interpretation has been added. Move the mouse pointer over the clip icon to view the contents of the interpretation.

6. An activated tick mark indicates that the coding has been approved.

7. The checkbox is used to mark the values to which a selected code should be applied.

8. The white cross in a grey circle is used to delete the applied code.

# 3 Finding and applying a medical code

This section gives an example of medical coding of adverse events using the Medical Dictionary for Regulatory Activities (MedDRA) and an example of medical coding of concomitant medication using the World Health Organization Drug Dictionary (WHO DD). The coding procedure is similar even if you are using other types of dictionaries.

### 3.1 A use case for coding with the MedDRA dictionary

3.1.1 Searching for a code

To find a code that you want to apply to a value, use the **Find and apply code** section.

There are three search options available:

- **Contains** the search will return all entries that contain the text typed in the search field. This is the default option.
- **Begins with** the search will return all entries that begin with the text typed in the search field.
- Exact match the search will return all entries that exactly match the text typed in the search field.

You can search for codes or (substrings of) terms in the **Search** field. Codes matching the term will be listed in a drop-drown list that deploys from the **Search** field. If a term is linked to multiple System Organ Classes (SOCs), the code that links to the primary SOC is displayed in black, while the codes that link to secondary SOCs are displayed in grey.

Searching is not case sensitive. If you type in "Anaphylaxis", the search can return results such as "anaphylaxis" and "Anaphylaxis".

A	Adverse event	s * Al	l countries	٠	A	ul sites 🔹	
All	tems	• Search	, Found 12 data items.			Find and apply code	
#	Subject ID	Value	Code	0		MedDRA	<ul> <li>Only current items</li> </ul>
1	NL-VUA-018	Headache	Migraine headache d	69 🛛		Search options	*
2	SE-AHU-054	Fever and headache	1 Band-like headache 2 Fever	0		Contains Begins with Exact match     Anaphylaxis	0
3	SE-AHU-058	Allergic reaction, anaphylaxis	Allergy	0		LLT 10000664 Acute anaphylaxis (VASC)	~
4	SE-AHU-059	Fever	Fever of unknown origin	0		LLT 10000664 Acute anaphylaxis (IMMUN) LLT 10002218 Anaphylaxis (VASC)	
5	SE-AHU-062	Vertigo	Acute rotatory vertigo	۲		LLT 10002218 Anaphylaxis (IMMUN)	2 <sup>[m]</sup>
6	SE-AHU-063	Headache	Forehead headache	0		LLT 10049090 Anaphylaxis prophylaxis (SURG) LLT 10002222 Anaphylaxis treatment (SURG)	Ŭ
7	SE-AHU-064	Headache				LLT 10060689 Exercise-induced anaphylaxis (VASC) LLT 10060689 Exercise-induced anaphylaxis (IMMU	N)
8	SE-AHU-072	Fever	Fever of unknown origin	0		LLT 10042931 Systemic anaphylaxis (VASC) LLT 10042931 Systemic anaphylaxis (IMMUN)	
9	SE-AHU-074	Vomiting	Acetonaemic vomiting	0		PT 10049090 Anaphylaxis prophylaxis (SURG)	
10	SE-AHU-075	Allergic reaction				PT 10002222 Anaphylaxis treatment (SURG)	
11	SE-AHU-076	Nauseous 🥖	Acute rotatory vertigo	8		Add interpretation	
12	SE-AHU-077	Headache	Cluster headache	0		Clear	

You can also search a code by selecting the System Organ Class (SOC), High Level Group Term (HLGT), High Level Term (HLT), Preferrred Term (PT) and Low Level Term (LLT) using the drop-down lists below the search field.

By default, the search returns low level terms (LLTs) that have the status 'current' in the <u>MedDRA</u> dictionary. It is possible to search among non-current MedDRA codes (that is, terms that are vague, ambiguous, truncated, abbreviated, out-dated, or misspelled and thus no longer used), by clearing the checkbox for **Only current items**.

Aa	Adverse event	is <b>*</b> A	Il countries	•	All sites	•		
All	tems	* Search	,0 Found 12 data items.		Find	and apply code		
#	Subject ID	Value	Code	$\odot$	MedE	DRA	<ul> <li>Only current</li> </ul>	items
1	NL-VUA-018	Headache	Migraine headache	•	Sear	ch options		•
2	SE-AHU-054	Fever and headache	1 Band-like headache	•	Sear	ch		
			2 Fever		soc	10021428 Immune system disorders		٣
3	SE-AHU-058	Allergic reaction, 🥒	Allergy 6		HLGT	10001708 Allergic conditions		¥
4	SE-AHU-059	Fever	Fever of unknown origin	•	HLT	10077535 Anaphylactic and anaphylactoid r	esponses	¥
5	SE-AHU-062	Vertigo	Acute rotatory vertigo	•	РТ	10002198 Anaphylactic reaction		0
6	SE-AHU-063	Headache	Forehead headache	•	ш	10000664 Acute anaphylaxis		۲
7	SE-AHU-064	Headache				Select 10000662 Acute anaphyl		
8	SE-AHU-072	Fever	Fever of unknown origin	•		10000663 Acute anaphylactic reaction		
9	SE-AHU-074	Vomiting	Acetonaemic vomiting	•		10000664 Acute anaphylaxis 10002198 Anaphylactic reaction	ŀ	
10	SE-AHU-075	Allergic reaction				10002218 Anaphylaxis		
11	SE-AHU-076	Nauseous 🥖	Acute rotatory vertigo	•	Add in		toid	
12	SE-AHU-077	Headache	Cluster headache	,	Add ar Clear	10042931 Systemic anaphylaxis		

#### 3.1.2 Selecting a code

Select the code you would like to apply. The details of this code appear in the fields below the search field. The checkbox **Current** displays whether the selected Low Level Term (LLT) has the status *current* in the <u>MedDRA</u> dictionary or not.

You can select to use the Preferred Term (PT) or the Low Level Term (LLT) by clicking one of the blue radio buttons behind the **PT** and **LLT** fields, see image.

Aa	Adverse event	ts 🔻	All countries		All sites	•		
All	tems	* Search	,O Found 12 data items.		Find	and apply code		
#	Subject ID	Value	Code	$\odot$	MedD	ORA 🕑 Only	current it	tems
1	NL-VUA-018	Headache	Migraine headache	0	Search options			•
2	SE-AHU-054	Fever and headache	1 Band-like headache 2 Fever	0	Sear	ch		
3	SE-AHU-058			0	SOC	10021428 Immune system disorders		٣
		anaphylaxis			HLGT	10001708 Allergic conditions		٣
4	SE-AHU-059	Fever	Fever of unknown origin	8	HLT	10077535 Anaphylactic and anaphylactoid responses		٣
5	SE-AHU-062	Vertigo	Acute rotatory vertigo	8	PT	10002198 Anaphylactic reaction	٣	۲
6	SE-AHU-063	Headache	Forehead headache	0	шт	10000664 Acute anaphylaxis	٣	۲
7	SE-AHU-064	Headache				Current		
8	SE-AHU-072	Fever	Fever of unknown origin	0				,
9	SE-AHU-074	Vomiting	Acetonaemic vomiting	0		LLT 10000664 Acute anaphylaxis (IMMUN)		
10	SE-AHU-075	Allergic reaction				Apply to selected (0)		
11	SE-AHU-076	Nauseous	Acute rotatory vertigo	0		terpretation nother code		
12	SE-AHU-077	Headache	Cluster headache	8	Add an Clear	nother code		

If you would like to add more than one code to the same field, click **Add another code**. If you would like to add an interpretation, that is, a comment or explanation of the selected code, click **Add interpretation** and type your interpretation in the field. You can reset your selections by clicking **Clear**.

Tip! If you want to apply a code that has been used before, click that code in the left side of the table. The **Find and apply code** section is then automatically populated with the selections for that code.

#### 3.1.3 Applying a code

To apply a selected code, select the checkboxes for the value or values you want to apply that code to, and click **Apply to selected**. The selected code will be applied to the selected subjects and values. In the example in the image, we applied two codes to the value *Allergic reaction, anaphylaxis* for subject *SE-AHU-058*.

Ā	Adverse event	s	* Al	l countries		Ŧ	A	ll sites	v		
All	tems	¥	Search	D Found 12 data items.				Find	and apply code		
ŧ	Subject ID	Value	•	Code		٢		MedD	ORA 🕑 Only	current if	tems
	NL-VUA-018	Head	lache	Migraine headache	Search options		ch options		•		
	SE-AHU-054	Feve	r and headache	1 Band-like headache 2 Fever	۲			anap	hylaxis		
								soc	10021428 Immune system disorders		٣
	SE-AHU-058	Aller	gic reaction, anaphylaxis	Hypersensitivity     Acute anaphylaxis		1	•	HLGT	10001708 Allergic conditions		٣
	SE-AHU-059	Feve	r	Fever of unknown origin	0			HLT	10077535 Anaphylactic and anaphylactoid responses		¥
	SE-AHU-062	Verti	go	Acute rotatory vertigo	۲			PT	10002198 Anaphylactic reaction	٣	0
	SE-AHU-063	Head	lache	Forehead headache	۲			шт	10000664 Acute anaphylaxis	٣	•
	SE-AHU-064	Head	lache						Current		
	SE-AHU-072	Feve	r	Fever of unknown origin	۲						,
	SE-AHU-074	Vom	iting	Acetonaemic vomiting	۲				PT 10020751 Hypersensitivity (IMMUN)		9
0	SE-AHU-075	Allen	gic reaction						LLT 10000664 Acute anaphylaxis (IMMUN)		
1	SE-AHU-076	Naus	eous 🥖	Acute rotatory vertigo	0				Apply to selected (1)		
2	SE-AHU-077	Head	lache	Cluster headache	0			Add int	terpretation		_

You can remove an applied code by clicking the cross icon to the right of the applied code.

### 3.2 A use case for coding with the WHO Drug Dictionary

#### 3.2.1 Searching for a code

To find a code that you want to apply to a value, use the **Find and apply code** section.

When using the <u>WHO DD</u>, you can select to search by:

- Drugs to search for drugs by their name. This is the default option.
- Active ingredients to search for drugs by their active ingredients. You can enter multiple ingredients in the search field, separated by ; and the search will return all drugs that contain all specified ingredients.

There are three search options available:

- Contains the search will return all entries that contain the text typed in the search field. This is the default option.
- Begins with the search will return all entries that begin with the text typed in the search field.
- Exact match the search will return all entries that exactly match the text typed in the search field.

A	Concomitant	medication *	All countries			All sites 🔹	
	,						
All i	tems	• Search	P Found 12 data items.			Find and apply code	
#	Subject ID	Value	Code		> (	WHODrug	
1	SE-AHU-014	Aspirin			6	Search options	•
2	SE-AHU-058	Montelukast	Auro montelukast	0	(	Drugs      Active ingredients	
3	SE-AHU-059	Humalog insulin	Actrapid insulin novo	0	(	Contains Begins with Exact match	
4	SE-AHU-060	Paracetamol	Albert Heijn Paracetamol	8	(	Search	,0
5	SE-AHU-061	Cinnarizine	Cinnarizine cox	0	(	Pref	
6	SE-AHU-062	Citalopram			6	Drug	
7	SE-AHU-063	Paracetamol	Coop vitality paracetamol	0	6	INGR INGR	
8	SE-AHU-064	Paracetamol	Coop vitality paracetamol	8	6	ATC -	
9	SE-AHU-071	Paracetamol			(	GEN 🖓	
10	SE-AHU-071	Cinnarizine	Cinnarizine cox	8	0	Show variants >>	
11	SE-AHU-071	Amoxycillin			0	2 g	
12	SE-AHU-073	Omeprazol			(		
Show	ing 12 of 12					Apply to selected (0)	
						Add interpretation Clear	

You can search for codes or (substrings of) terms in the **Search** field. Codes matching the term will be listed in a drop-drown list that deploys from the **Search** field.

Searching is not case sensitive. If you type in "paRacetaMol", the search can return results such as "paracetamol" or "Paracetamol".

The number behind the entries in the list depicts the number of active ingredients. If you click that number, a pop-up appears that lists the active ingredients.

All i	tems	• Search	Pound 12 data items.		Find and apply code
ŧ	Subject ID	Value	Code	Ø	WHODrug
ι	SE-AHU-014	Aspirin			Search options
2	SE-AHU-058	Montelukast	Auro montelukast	0	Drugs      Active ingredients
3	SE-AHU-059	Humalog insulin	Actrapid insulin novo	0	Contains Begins with Exact match
1	SE-AHU-060	Paracetamol	Albert Heijn Paracetamol	0	paRacetaMol 0
5	SE-AHU-061	Cinnarizine	Cinnarizine cox	0	UNU2UULAIT APO OSTEO PARACETAMO (NU2BE) 1 00020001AIY APO OSTEO PARACETAMO (NU2BE) 1
5	SE-AHU-062	Citalopram			00020001A2T Apo paracetamol (N02BE) 1
7	SE-AHU-063	Paracetamol	Coop vitality paracetamol	0	00020001A2T Apo paracetamol (     Active ingredients     00020001AMT Apo paracetamol x     1 Codeine phosphate
3	SE-AHU-064	Paracetamol	Coop vitality paracetamol	0	00020001AMT Apo paracetamol x 2 Paracetamol 12857102040 Apo Paracetamol/Cocone trop of
•	SE-AHU-071	Paracetamol			12857102040 Apo Paracetamol/Codeine (N02A)
lO	SE-AHU-071	Cinnarizine	Cinnarizine cox	0	13839802069 Apo tramadol/paracetamol (N02AJ) 2
11	SE-AHU-071	Amoxycillin			00020001A38 Apogen paracetamol (N02BE) 1 00020001A38 Apogen paracetamol (N02BE) 1
12	SE-AHU-073	Omeprazol			14007101267 Apohealth ibuprofen plus paracetamol (N02BE) 2
ihow	ing 12 of 12				Apply to selected (0) Add interpretation Clear

3.2.2 Selecting a code

Select the code (drug) you would like to apply. The details of this drug will appear in the fields below the search field.

In the <u>WHO DD</u>, all drugs have a preferred drug as parent. You can select to use the Preferred drug (Pref) or the Drug name by clicking one of the blue radio buttons behind the **Pref** and **Drug** fields. Drug is the default.

Notel When exporting medical coding, both the preferred drug and drug name are included in the export (in separate columns). But if you select to apply **Pref** while coding, the preferred name ends up in both columns in the export. This is to provide consistency for the data managers, so that they only have to look in one column to find their data.

All it	tems	* Search	,O Found 12 data items.			Find	and apply code	
#	Subject ID	Value	Code		$\odot$	WHO	Drug	
1	SE-AHU-014	Aspirin				Sear	ch options	•
2	SE-AHU-058	Montelukast	Auro montelukast	۲		para	cetamol	
3	SE-AHU-059	Humalog insulin	Actrapid insulin novo	۲		Pref	12857102001 Codeine phosphate;Paracetamol	0
4	SE-AHU-060	Paracetamol	Albert Heijn Paracetamol	۲		Drug	12857102040 Apo Paracetamol/Codeine	۲
5	SE-AHU-061	Cinnarizine	Cinnarizine cox	۲		Spec		
6	SE-AHU-062	Citalopram				INGR	Codeine phosphate;Paracetamol	
7	SE-AHU-063	Paracetamol	Coop vitality paracetamol	۲			N02AJ Opioids in combination with non-opioid analgesics 3	//
8	SE-AHU-064	Paracetamol	Coop vitality paracetamol	۲		ATC	Trous oppoids in combination with non-opiold analgesics a	
9	SE-AHU-071	Paracetamol				GEN		
10	SE-AHU-071	Cinnarizine	Cinnarizine cox	8		Hide v	ariants <<	
11	SE-AHU-071	Amoxycillin				CNTR	UNS Unspecified	٣
12	SE-AHU-073	Omeprazol				ман	Not specified	*
Show	ing 12 of 12					FORM	Unspecified	*
						STR	Unspecified	*
						MPID	3960974	v
							12857102040 Apo Paracetamol/Codeine	
							Apply to selected (0)	

Click **Show variants** to display and specify variants of the selected code (drug), and use the drop-down lists to select Country (CNTR), Marketing Authorization Holder (MAH), Pharmaceutical Form (FORM), Strength (STR), or Medicinal Product ID (MPID), if applicable. Click **Hide variants** to hide the variants, see image.

If you would like to add more than one code to the same field, click **Add another code**. If you would like to add an interpretation, that is, a comment or explanation of the selected code, click **Add interpretation** and type your interpretation in the field. You can reset you selections by clicking **Clear**.

Tip! If you want to apply a code that has been used before, click that code in the left side of the table. The **Find and apply code** section is then automatically populated with the selections for that code..

If you selected a drug that carries multiple Anatomic Therapeutic Chemical Classification System (<u>ATC</u>) codes, all ATC codes will be displayed in the **ATC** field. You can define whether to include all ATC codes in the coding or only a selection. Click the cross to remove an ATC code, or click the **ATC** field to add ATC codes.

-fal-	Medical coding	/ A demo study							Clos	se X
A	Concomitant	medication	All countries		٠		All sites	•		
All	tems	• Search	Pound 12 data items.				Find	and apply code		
#	Subject ID	Value	Code		٢		wно	Drug		
1	SE-AHU-014	Aspirin	Amcal aspirin	0			Searc	:h options		•
2	SE-AHU-058	Montelukast	Auro montelukast	0			voall	a		
3	SE-AHU-059	Humalog insulin	Actrapid insulin novo	8			Pref	00016007001 Dexamethasone valerate		
4	SE-AHU-060	Paracetamol	Albert Heijn Paracetamol	0			Drug	00016007002 Voalla		
5	SE-AHU-061	Cinnarizine	Cinnarizine cox	0			Spec			
6	SE-AHU-062	Citalopram					INGR	Dexamethasone valerate		
7	SE-AHU-063	Paracetamol	Coop vitality paracetamol	0			INGR			_//
8	SE-AHU-064	Paracetamol	Coop vitality paracetamol	8				A01AC Corticosteroids for local oral treatme C05AA Corticosteroids x	ent 🗶	
9	SE-AHU-071	Paracetamol	Apo Paracetamol/Codeine	8				D07AB Corticosteroids, moderately potent (		
10	SE-AHU-071	Cinnarizine	Cinnarizine cox	0			ATC	D10AA Corticosteroids, combinations for tre H02AB Glucocorticoids x R01AD Cortico		
11	SE-AHU-071	Amoxycillin						S01BA Corticosteroids, plain 💥 S02BA Co	rticosteroids 🗶	
12	SE-AHU-073	Omeprazol				0		S03BA Corticosteroids		
Show	ring 12 of 12						GEN			
							Show v	ariants >>		
							<b></b>	00016007002 Voalla		
							<b></b>	Apply to selected (0)		Π.
							Add an	erpretation other code		
							Clear			

#### 3.2.3 Applying a code

To apply a selected code, select the checkboxes for the value or values you want to apply that code to, and click **Apply to selected**. The selected code will be applied to the selected subjects and values.

A	Concomitant	medication *	All countries		٣	Al	l sites	*
All	tems	* Search	,O Found 12 data items.				Find	and apply code
#	Subject ID	Value	Code		$\odot$	2	wно	IDrug
1	SE-AHU-014	Aspirin					Sear	rch options 🔹
2	SE-AHU-058	Montelukast	Auro montelukast	8			para	acetamol A
3	SE-AHU-059	Humalog insulin	Actrapid insulin novo	0			Pref	12857102001 Codeine phosphate;Paracetamol
4	SE-AHU-060	Paracetamol	Albert Heijn Paracetamol	0			Drug	12857102040 Apo Paracetamol/Codeine
5	SE-AHU-061	Cinnarizine	Cinnarizine cox	0			Spec	
5	SE-AHU-062	Citalopram					INGR	Codeine phosphate; Paracetamol
7	SE-AHU-063	Paracetamol	Coop vitality paracetamol	0				N02AJ Opioids in combination with non-opioid analgesics 🗙
3	SE-AHU-064	Paracetamol	Coop vitality paracetamol	0			ATC	NOZAG Opiolas in combination with non-opiola analgesics 🗶
Ð	SE-AHU-071	Paracetamol	Apo Paracetamol/Codeine ┥	••••	3	~	GEN	
10	SE-AHU-071	Cinnarizine	Cinnarizine cox	۲			Show	variants >>
11	SE-AHU-071	Amoxycillin					·	
12	SE-AHU-073	Omeprazol					_	12857102040 Apo Paracetamol/Codeine
shov	ing 12 of 12							Apply to selected (1)
							Add in	Iterpretation

You can remove an applied code by clicking the cross icon to the right of the applied code.

After applying codes to the items, it is possible to approve/disapprove/reset the items as shown in the below table.

Action	Current state/found in list	New state/found in list
Approve	Coded Disapproved	Approved items
Disapprove	Coded Approved	Uncoded items
Reset	Approved Disapproved	Coded items

Tipl To see all items in one list, select the filter All items.

To approve items that have been coded:

### 1 Select the item(s) that you want to approve and click Approve selected.

Code	d items	* Search									
	Approve select	ed (1) Disap	prove selected	Reset sel	ected						
#	Subject ID ≡	Value	≡	@ 1	≡	@ 2	≡	Code		$\odot$	
1	DE-95-006	Atorvastatin		Tablet		Oral		Amlodipin/Atorvastatin Teva	8		
2	DE-95-008	ASA		Tablet		Oral		5 asa	0		
3	DE-96-006	lbuprofen		Tablet		Oral		Alben ibuprofen	0		
4	DE-96-112	Ibuprofen		Tablet				Alben ibuprofen	8		

2 The selected item(s) now disappear from the list and are found with the blue "Approved" symbol in the Approved items list.

Approv	ed Items	• Search					
#	Subjec ≡	Value =	@1 ≡	<i>⊘</i> 2 ≡	Code	$\odot$	
1	DE-95- 006	Atorvastatin	Tablet	Oral	Amlodipin/Atorvastati 🛽 🛽 🔊	$\odot$	
2	DE-95- 008	ASA	Tablet	Oral	5 asa 🛛 😒	$\odot$	
3	DE-96- 006	Ibuprofen	Tablet	Oral	Alben ibuprofen 🛛 😵	0	

Tip! The metrics of the medical coding that have been approved can be seen on the landing page:

Demo Study An open-label, multi center, dose escalation study investigating the safety, tolerability and	
🚯 🔤 📄 🏛 💼 📟 📮 Medical coding	
All sites Germany Sweden United States Japan	
CODED DATA <b>30%</b> 3 of 10 items	APPROVED CODING 66% 2 of 3 coded data 20% 2 of 10 all data
Latest action 2021-07-26 07:19 by Soff Ann Open medical coding	

## 4.1 Disapproving the medical coding

To disapprove items that have been coded:

1 Select the items that you want to disapprove and click **Disapprove selected**.

Code	ed items	* Search									
	Approve select	ed (1)	Disapprove selected	Reset sel	ected						
#	Subject ID $\equiv$	Value	=	@ 1	≡	@ 2	≡	Code		٢	
1	DE-95-006	Atorvastatir	n	Tablet		Oral		Amlodipin/Atorvastatin Teva	8		
2	DE-95-008	ASA		Tablet		Oral		5 asa	8		
3	DE-96-006	lbuprofen		Tablet		Oral		Alben ibuprofen	8		
4	DE-96-112	Ibuprofen		Tablet				Alben ibuprofen	8		

2 The selected item(s) now disappear from the list and are found with the red "Disapproved" symbol in the Uncoded items list for re-evaluation.

Unco	ded items	Search									
#	Subject ID ≡	Value	=	<i>@</i> 1	=	@ 2	=	Code		$\odot$	
1	DE-95-008	ASA		Tablet		Oral		5 asa	0	0	
2	DE-95-010	Paracetamol		Tablet		Oral					
3	DE-95-013	paracetamol		Capsule		Oral					
4	DE-95-031	paracetamol		Cream		Intraocular					

## 4.2 Resetting the medical coding

To reset items that have been approved or disapproved:

1 Select the item(s) that you want to reset and click **Reset selected**.

Unco	ded items	* Search						
	Approve select	ed (1) Disapprove selected	Reset selected					
#	Subject ID $\equiv$	Value =	Ø1 ≡	@2 ≡	Code		$\odot$	
1	DE-95-008	ASA	Tablet	Oral	5 asa	0	0	
2	DE-95-010	Paracetamol	Tablet	Oral				

The selected item(s) now disappear from the list and are found in the Coded items list without the approved/disapproved flag.

Code	d items	Search									
#	Subject ID ≡	Value	≡	@ 1	≡	@ 2	=	Code		$\odot$	
1	DE-95-008	ASA		Tablet		Oral		5 asa	۲		
2	DE-96-112	Ibuprofen		Tablet				Alben ibuprofen	۲		

# 5 Exporting the medical coding

2

It is possible to export medical coding using the export feature of Viedoc, see Exporting data.

🚯 🔤 📑 📰 📓 Data Export	
All sites Sweden Finland Germany Netherlands Austria Belgium Italy	United King
Subjects to include (115) All subjects	+
Events and time period All events (2)	+
Forms and items All forms	+
Type of data           Signed data         Not Signed data         SDV performed or NA         SDV pending         Medical	coding 🛞
✓ Signed data ✓ Not Signed data	
SDV performed or NA SDV pending	
In addition to data, also include the following in the export (will not be included in Preview Queries Review status Event dates Uploaded files	w data)
Output format	+
Output to Excel  Group data by form Trow per activity	
Preview data	

To export the medical coding, select the checkbox in front of Medical coding in the Type of data section.

For more information about how medical coding is exported, see:

- Medical coding in ODM export
- Medical coding in Excel export

Note! You can only export medical coding if permission to export data is activated for your role. If you do not see the data export icon, you do not have a role with export permissions.



Managing Viedoc Me

# Managing Viedoc Me

Published by Viedoc System 2024-10-10

 1. Introduction

 2. Activating the Viedoc Me account

 2.1 Sharing Viedoc Me Account Login Info with the subject

 2.2 Verifying the subject's contact information

 2.3 Resetting the PIN Code

 2.4 Quick access to Viedoc Me

 3. Locking and unlocking the Viedoc Me account

 4. Checking the status and subject activity

 4.5 Download log

 4.6 Viedoc Me account overview

This lesson applies to site staff managing the Viedoc Me application.

# 1 Introduction

1

If applicable for the study, a Viedoc Me account can be activated, allowing the subject to submit data to the study through any device using a web browser (phone, tablet, computer).

Note! Only user roles with editing permissions for the <u>study start event</u> form can activate a Viedoc Me account. If you do not have editing permissions, the phone icon (as seen in the image below) will not be visible on the Details page.

## 2 Activating the Viedoc Me account

To activate a Viedoc Me account for a subject:

Open a subject card and select the **phone icon** located in the top right corner of the Details page:



The Activate Viedoc Me account window opens:

<mark>8</mark> SE-31-020		Activate account	Cancel
Activate Viedoc Me accour Please complete the below sections related to the pa			
Language displayed to the participant Choose			
Participant email address	Repeat participant email address		
Participant phone number	Repeat participant phone number		
Specify how reminders should be communicated to Via email Via text message	to the participant		

#### 2 Language displayed to the participant

Choose the language that should be displayed to the subject by selecting the language from the dropdown list.

#### 3 Participant email address and Participant phone number

Enter the subject's email and/or phone number. These must be entered twice to ensure correct data entry.

Note! These options are only visible if the functionality for "sharing of access details" (login info) via email and/or text message has been enabled in the study settings. Please contact your study manager to have this option enabled.

#### 4 Specify how reminders should be communicated to the participant

Select whether to send reminders via email and/or via text message.

Notel These options are only visible if the functionality for "allow activity reminders" via email and/or text message has been enabled in the study settings. Please contact your study manager to have this option enabled.

The reminder settings can also be changed at any time after the Viedoc Me account activation.

Test messages can be sent out to the entered email address and/or phone number, see <u>Verifying</u> <u>subject email address and phone number</u>.

Select **Activate account** at the top right. The **Viedoc Me Account window** will display the subject's account details and login info:

le account			
tus			
			🖋 Edit
-	code: <b>7405</b>		
save as PDF file 🦳 Ser	d to participant's email a	ddress 🔵 Send to participant's į	phone number
		Reset PIN	Lock account
	Language: English Email address: ****   Phone number: ****   Reminders: Via email e login info	Language: English Email address: ****   Send test email Phone number: ****   Send test text message Reminders: Via email e login info FQI136   One-time PIN code: 7405	Language: English Email address: ****   Send test email Phone number: ****   Send test text message Reminders: Via email e login info 'QI136   One-time PIN code: 7405 save as PDF file O Send to participant's email address O Send to participant's p

The Viedoc Me Account activation process is now complete.

To share the login info with the subject, please continue with the steps below.

Notel You may only activate one subject's Viedoc Me account at a time.

### 2.1 Sharing Viedoc Me Account Login Info with the subject

After the Viedoc Me account has been activated, there are several options to share the login info with the subject. This may be done at any time and repeated as often as needed.

To share login info with a subject:

5

1

Open a subject card and select the **phone icon** located in the top right corner of the Details page:

1	<u>.</u> . <	20/20
		Close
	in Edi	t
pant's phone	number	
t PIN 🔒 I	Lock accoun	t
	pant's phone	pant's phone number

2

Select the options for sharing the Viedoc Me login info with the subject:

- Select Print or save as PDF file to download a PDF with the Viedoc Me login info. This can be printed and given to the subject on paper, or shared as a PDF through other means.
- Select Send to participant's email address to send the Viedoc Me login info via email.
- Select **Send to participant's phone number** to send the Viedoc Me login info via text message.

Notel If the functionality to "share Viedoc Me access details" (login info) via email and/or text message has not been enabled in the study settings, then only the option to Print or Save as PDF file will be visible here. Please contact your study manager to have this option enabled.

Note! The Viedoc Me login page URL always contains the string "idp". This is expected behavior.

3 Once the sharing method has been selected, select **Share** to complete the action:

- If **Print or save as PDF file** was selected, a PDF with the Viedoc Me login info will be downloaded in your browser.
- If Send to participant's email address was selected, an email with the Viedoc Me login info will be sent to the subject.
- If Send to participant's phone number was selected, a text message with the Viedoc Me login info will be sent to the subject.

Notel After sharing the login info, if you wish to share again with the subject you will receive a message next to the share button stating that the PIN must be reset before sharing the login info again:

Share

i PIN code must be reset before the login info can be shared

### 2.2 Verifying the subject's contact information

To verify a subject's contact information is correct, a test email/text message can be sent. The test emails and text messages sent from Viedoc cannot be replied to.

Notel Sending a test email or text message is only possible if the functionality for "sharing of access details" (login info) and/or "allow activity reminders" via email and/or text message has been enabled in the study settings.

To send a test email and/or text message:

1 In the subject's details page, select the phone icon to open the Viedoc Me Account window. Select Send test email and/ Send test text message.

SE-31-02	0	Close
Viedoc	Me account	
Details St	atus	
2	ID: <b>SE-31-020</b>	💉 Edit
	Language: <b>English</b> Email address: ****   <mark>Send test email</mark>	
	Phone number: ****   <mark>Send test text message</mark> Reminders: <b>Via email</b>	

Notel The Send Test links are available only after the email address and/or the phone number was entered and **saved**. All changes done in the Viedoc Me account window must be saved in order for the test links to be available.

2 The result of sending out the test email/text message is displayed by a message.

If a test message was successfully sent:

Email address: ****	~	Test email successfully sent! Send again?
Phone number: ****	I	Send test text message
If a test message <b>failed</b> to	) s	end:

Email address: \*\*\*\* | Send test email Phone number: \*\*\*\*

! We were not able to send the test text message, please check the number, save settings and then test again!

In this case you might want to enter the email address/phone number again by selecting **edit**, save the changes, and try to send the test message again.

Note! A successfully sent message does not confirm the correct email/phone number, only that it was sent out successfully from Viedoc. Please confirm with the subject that the message was received to ensure the email/phone number is correct.

**3** The test message(s) may be sent again by selecting **Send again** (for example, if the subject cannot confirm they have received the message).

## 2.3 Resetting the PIN Code

The subject's PIN can be reset at any time by selecting Reset PIN:

SE-31-020	Close
Viedoc Me account           Details         Status	
ID: SE-31-020 Language: English Email address: ****   Send test email Phone number: ****   Send test text message Reminders: Via email	Edit
Viedoc Me login info Username: TQI136   One-time PIN code: 7405 Print or save as PDF file Send to participant's email address Send to participant's phone number	
Lock act	:ount

After the PIN is reset, you will need to share the login details again via PDF, email or text message by following steps 5 and 6 above.

Important! The account must be <u>unlocked</u> before the new PIN can be used for login. See <u>Locking and Unlocking the</u> <u>Viedoc Me Account</u> below for more information.

### 2.4 Quick access to Viedoc Me

3

If the subject is using Viedoc Me on a mobile phone, saving the URL as a shortcut on the home screen of the device can make future logins easier. Similarly, the Viedoc Me URL can be saved as a bookmark/favorite on a computer. Instructions on how to do this, and other valuable information for Viedoc Me users can be found in the <u>Using Viedoc</u> <u>Me (Information for study participants)</u> lesson.

## Locking and unlocking the Viedoc Me account

The Viedoc Me account can be locked/unlocked by selecting the Lock/Unlock account link in the Viedoc Me account details window:

SE-31-020	Close
Viedoc Me account       Details     Status	
ID: SE-31-020 Language: English Email address: ****   Send test email Phone number: ****   Send test text message Reminders: Via email	Edit
Viedoc Me login info Username: TQI136   One-time PIN code: 7405 Print or save as PDF file Send to participant's email address Send to participant's phone number Share	
Reset PIN Lock acc	ount

Notel The account is automatically locked if the subject enters incorrect login details more than 3 times. If this occurs, an alert email is sent out with information about the locked account. The users that receive this email are site and monitoring staff, if their user role is configured with:

- access to the same site as the subject
- either data entry permissions and/or Clinical Review/SDV permissions, where data entry permissions is defined as any data entry permissions. and not only permissions for the study start event.

When the account is locked (either manually or automatically), this is marked by a red **Account locked** icon in the top-right corner of the Viedoc Me account details window. To unlock it, select the **Unlock account** link in the bottom-right corner:

SE-31-020	Close
Viedoc Me account       Details     Status	Account locked
ID: SE-31-020 Language: English Email address: ****   Send test email Phone number: ****   Send test text message Reminders: Via email	it Edit
Viedoc Me login info Username: TQI136   One-time PIN code: **** Print or save as PDF file Send to participant's email address Send to participation Share PIN code must be reset before the login info can be shared	ant's phone number
Reset PIN	Unlock account

# 4 Checking the status and subject activity

You can check the Status tab of the Viedoc Me account window for status of incoming questionnaires and activity.

Here you can see how many times the subject logged in, when they last logged in, compliance, and when incoming questionnaires are expected:

Details Status			
Number of logins 4 L	ast login: 07 Dec 2022 16:52		🛓 Download log
Compliance 25%			
Event	Target date	Actual date	Status
Visit 1 (ViedocMe), EORTC QLQ-C30	08 Nov 2022 (-0/+2 days)	08 Nov 2022 10:46	Received
Visit 1 (Viedoc Me), SQUASH	08 Nov 2022 (-0/+2 days)	-	Missing
Visit 1 (Viedoc Me), Perception of Food Intake Visit 1 (Viedoc Me), Gastro	08 Nov 2022 (-0/+2 days)	-	Missing
Intestinal Tolerance	08 Nov 2022 (-0/+2 days)	-	Missing

### 4.1 Download log

All activities related to the Viedoc Me account can also be downloaded as an Excel file by selecting Download log.

The Excel file contains the following sheets: the Account Activities sheet and the Communication log sheet.

In the Account activities sheet, the following activities are saved, with the latest activity saved in the top row of the Excel file:

- Date\*
- Date
   Time\*
- Activity
- User name (site user at Clinic or subject)
- Submitted data/event name
- Submitted data/form name
- Submitted data/target date\*
- Submitted data/actual date\*
- Submitted data/status
- Login result
- PIN (Hashed)
- Change email (Hashed)
- Change phone (Hashed)
- Change reminder settings (email on/off, text message on/off)

#### \*Date and time of the site

To the right of the Account activities sheet is the Communications log sheet which contains information about all the emails and SMS messages sent to that subject.

Notel Email and SMS communication logs before the Viedoc 4.70 release are available, however these do not have the same level of detail.

The Communications log contains the following information:

- Message ID GUID
- User name (as in Viedoc Me account)
- Type of communication SMS/Email
- Datetime (UTC) datetime for when the communication happened
- Site type Training/Production
- Message Type (Subject Reminder/Contact Confirmation)
- Status Success/Failed
   Notel Success means that the message was successfully sent from Viedoc, and Failed means that the message failed to send from Viedoc. Further, if the status was Success but the recipient did not receive a message, then the problem lies outside of Viedoc. Please contact your PS representative if this should occur, or if your status returns Failed.
- Provider Proxy (Primary/Secondary) the provider that was used to send the message. (This
  information is used if needed for troubleshooting purposes).

AutoSave 💽 🛱 🏷 🖓 🗢 🗢		ViedocMeLog-TPD838-2022	20302195241.xlsx - Excel		🔎 Search (A	lt+Q)		
File Home Insert Page Layout	Formulas	Data Review View	v Help Acrobat					
Paste Copy ~	11 ~ A^ ~   <u> </u>		ab Wrap Text ⊡ Merge & Center →	General	→ Condit → Condit Formatt	ional Forma	at as Neutral	Bad Calcul
Clipboard 🔂 Font		د Aligr	nment	Nu Nu	mber 🕞			Styles
J24 • : × ✓ fx								
А	В	с	D	E	F	G	н	1
1 Message ID	User name	Type of communication	Datetime (UTC)	Site type	Message Type	Status	Provider	
2 f05d7f29-1df8-49e4-8d94-523981cf4101	TPD838	Sms	2022-03-02 09:40:05	Production	Subject Reminder	Success	Primary-Primary	
3 97a223dc-39ae-49ad-b264-a1e384aa77a7	TPD838	Email	2022-03-02 09:40:04	Production	Subject Reminder	Success	Primary-Primary	
4 2efe9360-8064-4cdd-8f63-7611e6be9ec6	TPD838	Sms	2022-03-02 09:30:05	Production	Subject Reminder	Success	Primary-Primary	
5 4fd789dd-ca6c-4f9e-ad92-b3483f2dd878	TPD838	Email	2022-03-02 09:30:04	Production	Subject Reminder	Success	Primary-Primary	
6 e2679b84-1895-4953-8638-beccb4ac4da5	TPD838	Sms	2022-03-02 09:15:04	Production	Subject Reminder	Success	Primary-Primary	
7 92159bb7-2982-4d38-b512-d9dc329754a4	TPD838	Email	2022-03-02 09:15:03	Production	Subject Reminder	Success	Primary-Primary	
8 dc23f734-c39b-43eb-a101-be358456b28b	TPD838	Sms	2022-03-02 09:10:57	Production	Contact Confirmation	Success	Primary-Primary	
9 6ab4c828-a6b9-4287-a182-06b0e4c8887a	TPD838	Email	2022-03-02 09:10:55	Production	Contact Confirmation	Success	Primary-Primary	

### 4.2 Viedoc Me account overview

If applicable for your study, you can see an overview of the Viedoc Me accounts on the Selection page:

<mark>_1</mark> S	Selection · Viedoc	Me						2	÷
Search		FOUND 41 CARDS.			Show all sit	ies 🔻	All account	.s	•
ID 41		# LOGINS (LAST LOGIN) 1	COMPLIANCE #1	# MISSED EVENTS (LAST MISSED) 11	STUDY COMPLETION 1	NEXT SCHEDULED 41		ACCOUNT STATUS	11
2	IN-03-003 <sub>Site3</sub>	0	-	-	-	-		Initiated	
	IN-03-002 <sub>Site3</sub>	<b>4</b> 29 Jun 2023 11:11 CEST	33%	2/3 (13 Apr 2023 00:00 CEST)	75%			Open	
2	IN-03-001 Site3	0	0%	<mark>3/3</mark> (20 Jan 2023 00:00 CET )	75%			Initiated	
	NO-ST4-007	<b>4</b> 07 Dec 2022 16:52 CET	0%	1/1 (09 Nov 2022 00:00 CET)	100%			Open	
8	SE-01-032 Site1	<b>2</b> 31 Oct 2022 14:33 EET	0%	3/3 (02 Nov 2022 00:00 EET )	75%			Open	
	NO-ST4-004 Site4	0	0%	2/2 (27 Oct 2022 00:00 CEST )	100%			Initiated	
2	SE-01-019	<b>1</b> 02 Jul 2021 17:21 EEST	0%	3/3 (04 Jul 2021 00:00 EEST )	75%			Open	
2	SE-01-018 Site1	<b>1</b> 21 Jun 2021 15:09 EEST	0%	<b>3/3</b> (23 Jun 2021 00:00 EEST )	75%			Open	
8	SE-01-017 Site1	<b>2</b> 22 Jun 2021 17:23 EEST	0%	3/3 (06 Jun 2021 00:00 EEST )	75%			Open	
Showing 1-	41 of 41 PREVIOUS NEXT					View	per page 20	50 100	500

For more information, see <u>Views on the Selection page</u> in the lesson Selection page.



Using Viedoc Me (information for study participants) - version 4.70 and earlier

# Using Viedoc Me (information for study participants) version 4.70 and earlier

Published by Viedoc System 2024-06-26

1. Introduction to Viedoc Me
2. Access to Viedoc Me
2.1 Document with login details
2.2 Logging in to Viedoc Me
2.3 Quick access to Viedoc Me
3. Events
3.4 Filling in a questionnaire of a scheduled event
3.5 Filling in a questionnaire of an unscheduled event
4. Video calls
5. Good to know
<u>5.6 Reminders via email or text message</u>
5.6.1 Setting reminders and changing your contact information
5.7 Changing your PIN code
5.8 Help
5.9 Log out
5.10 If you lose internet connection

# 1 Introduction to Viedoc Me

Viedoc Me is a web application used for collecting data from patients participating in clinical trials. It works on any device: a computer, tablet, or mobile phone, as long as the device has a browser and access to the Internet. The application enables you to fill in questionnaires and submit them.



- 2 Access to Viedoc Me
- 2.1 Document with login details

Access to Viedoc Me is provided by your doctor, nurse, or other contact at the clinic. You will be provided with a document that looks as follows:

	ViedocMe
1 📀 🖿	ps://internalitectAme.viedoc.net/
2 1	TVA616
3 🕅	8292
	A demo study SE-AHU-090

The document contains the following info:

- 1. The URL (web address) to Viedoc Me.
- 2. Your user name. The user name consists of three characters followed by three numbers, for example TVA616.
- 3. Your PIN code. The PIN code consists of four numbers.

Note! When you enter the URL (web address) from the login information PDF in a browser, you are redirected to a URL that looks slightly different and that contains the string "idp". This is the expected behavior.

### 2.2 Logging in to Viedoc Me

To log in to Viedoc Me:

1 Open a web browser on your device. Type the URL that is stated on your document in the address bar.

The Viedoc Me login page opens.

	ViedocMe	i
L	TVA616	
R	••••	
	Log in	
Viedo	© PCG Solutions AB 2019 cMe 4.53 [2019-09-03 09:23 UTC]	

- 2 Type your user name in the field next to the person symbol.
- **3** Type your PIN code in the field next to the key symbol.

#### 4 Select Log in.

Note! When logging in for the first time, you may be prompted to change you PIN code, if applicable for the study you are participating in. This will also be the case if the clinic staff have reset your PIN code:

ViedocMe	
Welcome to Viedoc Me!	
You need to set a new PIN code before using Viedoc Me.	
PIN Code	
New PIN code	
Repeat new PIN code	
Cancel	Save

Enter a new PIN code and select Save and then select Continue in the next window.

### 2.3 Quick access to Viedoc Me

If you are using Viedoc Me on a mobile phone, future logins can be done easier by saving the URL. It will appear as an app on the home screen of the device:



To save Viedoc Me as an app:

- 1 Open a web browser on the phone and navigate to the URL that is stated in the document provided to you.
- 2 Select the option *Save to home screen* or anything similar to that, depending on the device.

The Viedoc Me application is now available as an app on the phone.



There are two types of events:

#### 1. Scheduled events

Under **Next scheduled event (1)**, you see the next questionnaire that is to be filled in, and the time during which it is available. This questionnaire is part of the scheduled events that are planned for the study. These scheduled events are displayed on the Viedoc Me start page, one at a time, in the order in which they are scheduled. If you want to see all scheduled events, select **Show all events**, and a list of all scheduled events appears (see image).

#### 2. Unscheduled event

For some studies, you can spontaneously report data outside of the time frames of the scheduled events. These reports/questionnaires are called **Unscheduled events** (2), and can be added at any time, in an unlimited number of times. Note that unscheduled events are not used in all studies, so they might not be available for the study you are participating in.

ViedocMe	i) Study info	Settings Log out
N/A		<b>0</b> missed events.
Next scheduled event Wednesday, September 4, 2019 Home administration		
🖋 Available 03-05 Sep 2019		>
Unscheduled events		Ľ
Show all events		3
Get help		0
		Contraction of the second second
	× 1	
< Back Viedoc All events (3)	:Me	
	:Me	
All events (3) 4 Wednesday, September 4, 2019 Home administration	:Me	

Note! The names of the questionnaires differ depending on the study. The above image is just an example!

#### 3.1 Filling in a questionnaire of a scheduled event

To fill in a questionnaire of a scheduled event:

Note! You can only fill in a scheduled event (questionnaire) during the period it is available.

#### Select the Next scheduled event.

In the example below, the event name is *Home administration*. Note that it may have another name in your study.

ViedocMe	i Study info	Ö Settings	Log out
LG N/A		0 missed	l events.
Next scheduled event Wednesday, September 4, 2019 Home administration			
Available 03-05 Sep 2019			>
Unscheduled events			ď
Show all events			3
Get help			0

The questionnaire opens.

- 2 Enter your answers to the questions. If there are multiple pages, you can navigate to the previous page by selecting **Back**, or to the next page by selecting **Next** (only if you have provided an answer to the question).
- 3 When you have answered the last question, select **Send** to submit the data. The date and time of submission will be saved together with the data.
- 4 Select **Go to startpage** to return to the Viedoc Me start page.

#### 3.2 Filling in a questionnaire of an unscheduled event

If the study allows, you might be able to spontaneously report data at any time.

To fill in a questionnaire of an unscheduled event:

#### 1 Select Unscheduled events.

ViedocMe	i Study info	Settings Log out
<b>I</b> C N/A		0 missed events.
Next scheduled event Wednesday, September 4, 2019 Home administration		>
Unscheduled events		ď
Show all events		3
Get help		0

1

Select the name of the questionnaire next to the orange + icon. In the example below, the name is *Home administration.* Note that it may have another name in your study.

<b>&lt;</b> Back	ViedocMe	
Unscheduled events		Ø
+ Home administration		

The questionnaire opens.

- 3 Enter your answers to the questions. If there are multiple pages, you can navigate to the previous page by selecting **Back**, or to the next page by selecting **Next** (only if you have provided an answer to the question).
- 4 When you have answered the last question, select **Send** to submit the data. The date and time of submission will be saved together with the data.
- 5 Select **Go to startpage** to return to the Viedoc Me start page.

# 4 Video calls

The Viedoc Connect application allows the clinic staff to initiate a video call with you.

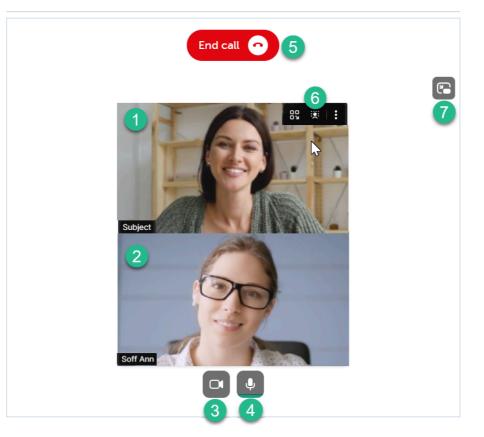
When your doctor has initiated a call, the video call module in Viedoc Me flashes in blue with the text **Join video call**. Select anywhere on the module to join the call.

ViedocMe	i Study info	Ö Settings	Log out
100%		0 missed	d events.
No scheduled events			
Join video call			
Unscheduled events			ľ
Show all events			1
Get help			8

Notel It's important to allow your web browser to access your camera and microphone, if prompted:

viedoc.net wants to Use your microphone Use your camera Allow Block

2



- 1. The subject's screen (you)
- 2. The doctor's screen
- 3. Camera settings select to disable the camera, hover to see more settings.
- 4. Microphone settings select to mute your mic, hover to see more settings.
- 5. End call button select to end the call.
- 6. More screen settings hover over the participant's screen to show available options in the upper right corner.

7. Picture-in-picture - select to continue the video call with a remotable screen that will be shown even if you switch tab. Hover over the mini-screen and select **Back to tab** to return to the video call main screen.

# 5 Good to know

#### 5.1 Reminders via email or text message

The Viedoc Me application can send reminders to remind you of upcoming scheduled events. These reminders are configured by the study staff at the clinic and can be sent as an email and/or a text message (sms). Note that you cannot reply to emails sent from Viedoc.

If applicable for the study you are participating in, you can change your email, phone number, and reminder settings if needed. If this option is not configured for your study, please inform the study staff at the clinic if you need to update your contact information and/or reminder settings.

#### 5.1.1 Setting reminders and changing your contact information

To change your contact information and reminder settings, if applicable for the study you are participating in:

- 1 9 ViedocMe 0 Study info og out H ngs 🖒 N/A nts. Next scheduled event Wednesday, September 4, 2019 4 Home administration 🖉 Available 03-05 Sep 2019 > Unscheduled events Show all events 3 Get help 8 ViedocMe < Back Ø PIN code XNR751 New PIN code Repeat new PIN code Email address Email address Send reminders to this e-mail address Phone number +CountryCode PhoneNumber 3 Send reminders to this phone number Save
- 2 Check the box(es) (3) to allow Viedoc to send reminders to the email and/or phone.
- 3 Select **Save** to save the changes.

### 5.2 Changing your PIN code

You can change the PIN code that was provided to you.

To change the PIN code:

1

#### Select Settings.

1

ViedocMe	×	টি টি Study info Settings .og out	
<mark>∎</mark> C N/A		Settings Umissea events.	
	event sday, September 4, 2019 administration	$\langle \rangle$	
🥖 Available 03	i-05 Sep 2019	>	N
Unscheduled	d events	Ľ	
Show all eve	nts	3	
Get help		0	
	K Back	ViedocMe	-
	Settings		•
	PIN code		TMQ116
	New PIN code	Repeat new PIN code	
	Cancel		Save

- 2 Enter a new PIN code in the field **New PIN code**, and repeat it in the field **Repeat new PIN code**.
- 3 Select Save to save the changes.

#### 5.3 Help

If you forget how to log in to Viedoc Me or if you have lost the document with the login details, please contact your doctor/nurse or site staff at the clinic. They can create a new document with your login details for you.

### 5.4 Log out

You will automatically be logged out from Viedoc Me after 20 minutes of inactivity. Yet, we recommend you to always log out when you are done with the questionnaires, to avoid that anyone else can gain access to your device and submit data using your account.

Select Log out in the upper right corner to log out from Viedoc Me.

0 missec	l events.
	>
	>
	ľ
	3
	8

# 5.5 If you lose internet connection

While logged in to Viedoc Me, the system tolerates loss of internet connection up to one minute. If you lose internet connection for more than one minute, you will be automatically logged out. Any data that has not been submitted at that time will be lost.



#### Using Viedoc Me - (information for study participants)

## Using Viedoc Me (information for study participants)

Published by Viedoc System 2025-02-18

1. Introduction to Viedoc Me 2. Access to Viedoc Me 2.1 Activating your Viedoc Me Account 2.2 Logging in to Viedoc Me 2.3 Quick access to Viedoc Me 3. Start screen 4. Events 4.4 Upcoming event 4.5 Filling in an event 4.6 Filling in an unscheduled event 5. Video calls 5.7 Viedoc connect settings 6. Receiving and signing documents with Viedoc Share 6.8 Opening a document 6.9 Filling in document fields 6.10 Using notes in documents 6.11 Signing a document 6.12 Downloading a document 7. Expanded functions 7.13 Reminders via email or text message 7.13.1 Setting reminders and changing your contact information 7.14 Changing your PIN code 7.15 Help 7.16 Log out



### Introduction to Viedoc Me

Viedoc Me is a web application used for collecting data from patients participating in clinical trials. It works on computers, tablets, or mobile phone devices, as long as the device has a browser and access to the internet.

Viedoc Me helps you fill in questionnaires and submit them, keep track of events, connect with a physician through **Viedoc Connect**, or receive and sign documents through **Viedoc Share**.

# 2 Access to Viedoc Me

Access to Viedoc Me is provided by your physician, nurse, or other contact at the clinic. Depending on the study, your Viedoc Me login information will be shared via **email**, **text message**, and/or a **document** (paper document or PDF file).



#### Activating your Viedoc Me Account

To activate your Viedoc Me account and log in for the first time:

#### 1 Open Viedoc Me:

If your clinic contact shared your Viedoc Me login info via email or text message, you will receive a message with a link to activate your account.

- Select the **link** in the email or text message you received. A page opens where you can set your PIN code (continue to step 2 below).

If your clinic contact shared your Viedoc Me login info via a **document**, you will receive either a paper document or a digital PDF file that contains the URL (web address) to Viedoc Me, a QR code that can be scanned by your mobile device for easy access to the URL, your user name, and your PIN code.

- Open a web browser on your device and enter the URL (web address), or scan the QR code on the document with your mobile device.
- Enter your User Name and your PIN code as they appear on your document.
- Select Log in.
- Depending on your study's settings you may be required to change your PIN code the first time you log in. In that case, you will be automatically directed to the Set PIN code page (continue to step 2 below).
- If your study *does not* require you to change your PIN code, your Viedoc Me account is now activated and you will be taken directly to the Start Screen. Please see <u>Viedoc Me Start</u> <u>Screen</u> below for more information on using the application

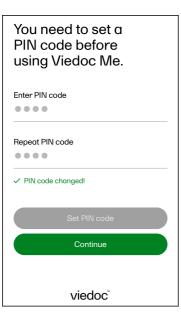
Notel When you enter the URL (web address) from the login information PDF in a browser, you are redirected to a URL that looks slightly different and that contains the string "idp". This is the expected behavior.

#### 2 Change your PIN code:

The first time you log in to Viedoc Me you may be required to set a new PIN code. Enter your new **PIN** code twice. Make sure you remember or save your PIN code, you will need it to log in to Viedoc Me in the future.

viedoc me
You need to set a PIN code before using Viedoc Me.
Enter PIN code
Repeat PIN code
PIN code must consist of at least 4 digits.
Set PIN code
viedoc

Select Set PIN code to save. The "PIN code changed!" confirmation message is displayed:



4 Select Continue.

3

#### 5 Account activation is complete!

A Welcome screen is displayed:



6 Please remember to save your PIN code and the URL for future logins. For tips on saving the URL as an icon on the home screen of your device see <u>Quick Access to Viedoc Me</u> below.

Note! Your PIN code can be reset at any time, for example if you forget it. Please reach out to your contact at the clinic for help resetting your PIN code.

#### Select Continue.

Your account is now activated! Please see <u>Viedoc Me Start Screen</u> below for more information on using the application.

### 2.2 Logging in to Viedoc Me

To log in to Viedoc Me:

1 Open a web browser on your device. Type the URL that you received via email, text message or in a document. For tips on saving the URL as an icon on the home screen of your device see <u>Quick Access</u> to <u>Viedoc Me</u> below.

#### The Viedoc Me login page opens:

viedoc me
Welcome. Great to see you here.
Username
PIN code
Log in

- 2 Enter your user name.
- 3 Enter your PIN code.
- 4 Select Log in.

The **Viedoc Me Start Screen** is displayed. Please see <u>Viedoc Me Start Screen</u> below for more information on using the application.

#### 2.3 Quick access to Viedoc Me

If you are using Viedoc Me on a mobile device, future logins can be made easier by saving the URL as a shortcut. It will appear as an icon on the home screen of your device:



To save Viedoc Me to the home screen:

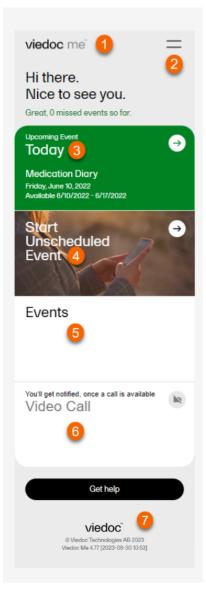
- 1 Open a web browser on the phone and navigate to the URL that is stated in the document provided to you.
- 2 Select the option to Add to Home Screen

The Viedoc Me application is now available to select on your device.

Similarly, you can select the Viedoc Me URL and add it to the Favorites menu on your computer.

# 3 Start screen

When you log into Viedoc Me you will see the following start screen:



- 1. The Viedoc Me logo select from anywhere in the app to return to the start screen.
- 2. The menu select to see study info, change your settings, get help, or to log out.
- 3. The upcoming events tile select to see which upcoming events you must fill in.
- 4. The start unscheduled event tile select to start an unscheduled event.
- 5. The events tile select to see past and future events.
- 6. The video call tile select when a call becomes available to join a video call.
- 7. The get help button select for information on how to contact clinical staff.

# 4 Events

#### 4.1 Upcoming event

In Upcoming Event, you will see the next events that your study has scheduled for you.



- 1. The title of the event.
- 2. The date the event is to be started.
- 3. The dates of availability for the event.

4.2 Filling in an event

To fill in a scheduled event:

Notel You can only fill in an event during the availability period.

#### 1 Select the Upcoming Event tile.

viedoc me	=
Hi there. Nice to see you. Great, 0 missed events so far.	
Upcoming Event Today Medication Diary Friday, June 10, 2022 Available 6/10/2022 - 6/17/2022	<b>Ə</b>
Start Unscheduled Event	•
Events	2
You'll get notified, once a call is available Video Call	
Get help	
viedoc <sup>™</sup> © Viedoc Technologies AB 2022	

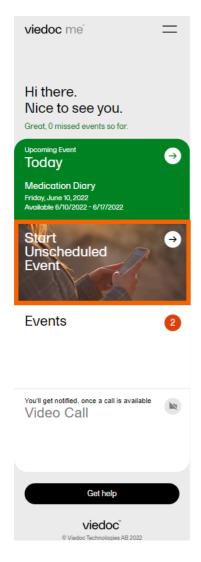
- 2 Select your answer to the questions. If there are multiple pages, you can navigate by using the arrow buttons.
- Complete the event and then select Submit.
   Note! Before you select Submit, you will be prompted to ensure your answers are set. You can select the back arrow button if you need to edit your answers.
- 4 Select Go to startpage to return to the Viedoc Me home page.

### 4.3 Filling in an unscheduled event

If the study allows for it, you will be able to report data at any time.

To fill in an unscheduled event:

#### 1 Select Start Unscheduled Event.



Select the name of the event.

viedoc me	=
Unscheduled Events	
Adverse Reaction Report	) سا
Cognitive Test Sample	→
viedocč © Viedoc Technologies AB 2022 ViedocMe 4.71 [2022-06-10 17:15]	

Notel You might have different report names in your study.

- **3** Select your answers to the questions. If there are multiple pages, you can navigate using the arrow buttons.
- Complete the event and then select Submit.
   Note! Before you select Submit, you will be prompted to ensure your answers are set. You can select the back arrow button if you need to edit your answers.
- 5 Select **Go to startpage** to return to the Viedoc Me home page.

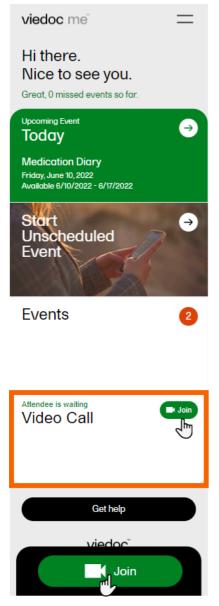
# 5 Video calls

The Viedoc Connect application allows the clinic staff to initiate a video call with you.

When your physician or nurse has initiated a call, the video call button will appear at the bottom of the screen.

Select Join anywhere in the app to join the call. Alternatively, you can select the Video Call tile to join a call.

2



Notel If prompted, please select **Allow** so Viedoc Connect can access your camera and microphone through the browser.

### 5.1 Viedoc connect settings

During the call, you will see the following screen:



1. End call button - select to end the call.

2. Minimize button - select to minimize the Viedoc Connect window and continue in the app or in another window while speaking with the physician or nurse. Select Full screen in the app to bring the video window back into view.

- 3. Screen settings for subject select to see more settings.
- 4. Screen settings for clinician select to change screen and volume settings for clinician window.
- 5. Mic symbol select to mute and unmute your microphone.
- 6. Cam symbol select to turn your video stream off and on.

# 6 Receiving and signing documents with Viedoc Share

Depending on your study, you may be able to receive and sign documents in Viedoc Me. If a document is shared with you, you may receive a notification via email, text message, and/or directly in the Viedoc Me application.

#### 6.1 Opening a document

To open a document that has been shared with you:

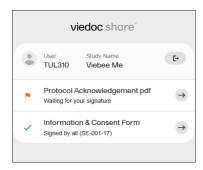
1 If you received an email or text message with a notification that a document was shared with you, click the link in the email or text message to go directly to Viedoc Share (skip to step 3 below).

2 If you did not receive an email or text message, you see your documents by logging into your Viedoc Me account. When you log in to Viedoc Me, if you have a new document there will be a red circle next to the documents section indicating how many new documents there are for you to view and/or sign. The tiles may be arranged slightly differently depending whether you are on a mobile device or computer, but the sections will look the same.

#### Select Documents.

viedoc me State Unscheduled Event	<b>→</b>
Events	Ð
Documents	1
You'll get notified, once a call is available Video Call	X

3 Viedoc Share will be displayed with a list of documents that have ben shared with you, indicating any actions that you need to complete:



The icons displayed to the left of each document indicate a status and any required actions:

•	A <b>blue circle</b> indicates that the document has not yet been viewed, and there are no required signatures.
•	A <b>gray circle</b> indicates that the document has been viewed, and there are no required signatures.
•	An <b>orange flag</b> indicates that the document requires your signature.
~	A green checkmark indicates that the document has been signed by all required people.
$\checkmark$	A <b>gray checkmark</b> indicates that the document has been signed by you, but still requires a signature from a co-signatory.

- 4 Select a document to open it.
- 5 Review the contents of the document.

### 6.2 Filling in document fields

The document may include questions to answer or fields to fill in. If they are required, the fields must be completed before you are able to sign the document.

To fill in document fields:

1 If there are options or fields for you to complete, they will be displayed in the document. Required fields are outlined in red.

~	Choose action ↓
	***
Participant Protocol Ackno	wledgement
Sample Demo Study 2024	
This document ensures that you, as a participant in this cl understand the study's protectal and procedures. Please e statements below. Rease read each statement carefully o	mark "Yes" or "No" to each of the
COTTERAS.	fes No O
protocol and procedures to me in detail.	fes O No O
By completing and signing this form, you confirm that you	
Study's protocol, procedures and expectations and have you have any further questions, please feel free to reach a Thank you for your cooperation and participation.	had all your questions answered. If
Participant Name: Today's Dat	te (MM/DD/YYY):
Participant Signature (electronic)	

2 Select the round or square buttons by tapping with your finger (on a mobile device) or clicking on them with your cursor (on a desktop computer). If there are text fields, select the field to begin typing in it.

$\leftarrow$		Choose action ↓		
		•••		
	Participant Protoco	ol Acknowledgement		
	Sample Demo Study 2024 This document onsures that you, as a participar understand the study's protocol and procedure statements below. Hease read each statement	res. Please mark "Yes" or "No" to each of the		
	I have read the study protocol and understand contents.	id Ra Yes 💽 No 🔵		
	A member of the study team explained the stud protocol and procedures to me in detail.	Naty Yes  No		
	I have had the opportunity to ask questions are received satisfactory answers.	red Yes O No		
	By completing and signing this form, you confirm that you understand the Sampla Damo Shari's pointext, procedures and equestations and here had all your questions american. If movies any further according, parsent finite in each out it be study item at any time. There is no for your cooperation and participation.			
	Participant Neme: To	Today's Date (MM/DD/YYI):		
		11/08/2024		
	Pericipant Signature (electronic)			

3 When all of the required fields have been completed you will be ready to sign the document (if required).

#### 6.3 Using notes in documents

If you would like to add a question or comment to the document that was shared with you, you can add notes to a document that has not yet been signed. Once a note is added, someone on the study team is able to respond to your note.

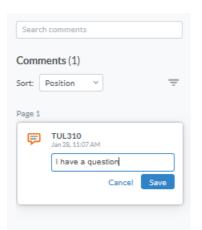
Notel You can only add notes to documents that require a co-signatory.

To add a note to a document:

1 Select the **Notes** icon on the top right of the document. If you do not see this icon, there is no co-signatory for this document and you will not be able to add notes.

$\leftarrow$	Choose action ↓
	₽
	Sample Derro Study Subject Understanding and Consent
	Pictore solicit each statement that is TFUE:
	Amember of the study team explained the study protocol and protocol and protocol and in detail.
	That the apportunity to ask questions, and I mosived satisfactory announces.
	Pisase select whether you would like to participate in the dama study:
	Vec. Tagene to part cliphe in the study No. / de not agree to part cliphe in the study No. / de not agree to part cliphe in the study
	Picese Rillin your name and today's date:
	Your Prod and Least Name: Today's Date (1994/EDVYYY):
	If you, have any questions, passes results out to your unclust answer at Dampite Barries Dauly.

2 Click or tap anywhere on the document to place your note. A textbox will be displayed where you can type in your text:



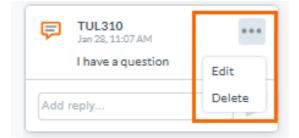
Notel Notes more than 240 characters may not display correctly in the browser after they are downloaded. They will display correctly when the downloaded document is viewed in a PDF viewer.

3 Select Save when you are finished typing your note.

You may add multiple notes to the document by repeating the same process.

To edit or delete a note:

1 Select the note you want to edit or delete. Select the **options menu** in the top right corner of the note:



2 Edit the text and select Save when you're finished. Or select Delete to delete the note.

Note! Only notes that have not received a reply yet can be edited or deleted.

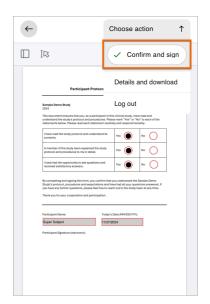
When you receive a reply to your note, you can add more replies as needed:

Search comments Comments (2) Sort: Position	÷
Page 1	
FILL310       Jan 28, 7:21 PM       I have a question	
F TUL310 Jan 28, 7:58 PM I have another questio Super Investigator (1486 Jan 28, 8:37 PM	
Here's a response to question!	your
Add reply	

6.4 Signing a document

To sign a document:

1 Select **Choose action** at the top right of the screen. If your signature is required, and any required fields have been completed, the **Confirm and sign** option is displayed:



2 Select **Confirm and sign**. To confirm that you have reviewed the document, select the round button to the left of the confirmation statement and a green check mark will appear. Select **Sign using one-time code**.



3 A one-time passcode with six numbers will be sent to you via email or text message. Check the message and enter the code. Select **Verify**.

Choose act	tion ↓
Confirm and sign	×
Confirm that you have reviewed the docume	nt
<ul> <li>I have read and unders the contents of the file.</li> </ul>	tood
Verify your signature with the one-time code you by email or SMS	sent to
One-time code	
✓ One-time code has been delivered.	
✓ Verify	

4 **Signature details** will be displayed, confirming that you have signed the document. Close this popup to return to the document view.

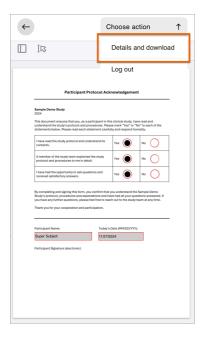


### 6.5 Downloading a document

You can always download a copy of the document, whether the document requires a signature or not.

To download a copy of the document:

1 While viewing the document select Choose action at the top right, and select Details and download:



2 Sharing details and document history will be displayed. Under the details select the green **download** icon to see the options available for downloading:

Sharing details	×
Protocol Acknowledg t.pdf	emen
Binder Id: 466 Document version: 2	
Version Date: 01 Nov 2024	
Original file name: Protocol Acknowledgem	ent.pdf
File date: 26 Nov 2024 11:04 File size: 48	.25 KB
File integrity: tpa+7echzyC85hgEmGeRxg==	
	if co- atories: <b>0</b>
✓ Signed by all	
Download original file	$\smile$
History Download with sharing detail	s
Signed 27	))
Download with signatures Reason: I the file.	of
Document viewed 27 Nov 2024 10:35 by (TUL310)	SE-001-17

The following options are available for downloading the document:

- **Download original file**: will download a copy of the original document. Any fields (ie. radio buttons, checkboxes or text fields) in the document will be empty in this version.
- Download with sharing details: will download a zipped folder which contains a copy of the document with any completed fields, and a separate file with sharing details and document history.
- Download with signatures: will download a copy of the document which includes a cover page containing signature details. Any completed fields completed will also be visible in this version. (Note! this option is only available if ALL of the required people have signed the document).
- Download with notes: will download a copy of the document which contains any notes added to the document, as well as any completed fields.

Notel In some cases notes may not display correctly when viewing the downloaded document in a browser, please try to open the document in a PDF viewer instead.

3 Select an option to begin downloading the document.

# 7 Expanded functions

#### 7.1 Reminders via email or text message

The Viedoc Me application can send event notifications to your email or as a text message (SMS) to your mobile device. These notifications are configured by the study managers. It is important to know that you cannot reply to these reminders sent from Viedoc.

If your study allows, you can change your email, phone number, and reminder settings from the settings option in the menu. If these options are not available to you, please inform the study managers at the clinic if you need to update your contact information or reminder settings.



Change your contact information and reminder settings in the application when available:

- **1** Select the menu symbol on the start page.
- 2 Select settings.

Enter your updated email address and phone number.

viedoc me 📃
Settings
E-mail Address
Phone Number
<ul> <li>Reminder Settings</li> <li>Send reminders to this e-mail address</li> <li>Send reminders to this phone number</li> </ul>

4 Select Save Changes and your information will be updated.

### 7.2 Changing your PIN code

You can update your PIN code anytime.

To update the PIN code:

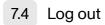
- **1 Select** the menu symbol on the start page of the app.
- 2 Enter a new PIN code in New PIN code. Re-enter your new PIN code in Repeat new PIN code.

viedoc me <sup>°</sup> =
<ul> <li>Changes successfully saved.</li> </ul>
User ID TYR668
PIN code
New PIN code
Repeat new PIN code
Language
English 🗸
E-mail Address

3 Select Save Changes and your PIN code will be updated.

#### 7.3 Help

If you forget how to log in to Viedoc Me or if you have lost your login document, please contact your physician, nurse, or site staff for your study. They can reset your PIN code and create a document with new login details for you.



The application will automatically log you out from Viedoc Me after 20 minutes of inactivity. However, we recommend you always log out when you are done with your questionnaires to avoid someone else gaining access to your device and submitting false data.

To log out, select the menu icon, and then select Log out.



**Using Viedoc Connect** 

# **Using Viedoc Connect**

Published by Viedoc System 2024-10-10

1. Introduction <u>1.1 Prerequisites</u> 2. Opening Viedoc Connect 3. Initating a call 4. Troubleshooting



### Introduction

Viedoc Connect enables meetings between Clinic and Viedoc Me users through video calls. The video calls are started from Clinic, and the call is opened in a new tab that is the Viedoc Connect application. Once the call is initiated/ongoing, subjects can join the video call through the Connect module which is available in Viedoc Me.

A video call that has been started is valid/open to join within 60 minutes. Users can also leave and re-join the video call. The users are free to navigate in the Clinic tab to other pages during the call, and the subjects can navigate within Viedoc Me and submit questionnaires during the call.

Viedoc Connect only allows one active video call at a time, meaning that only the latest started video call is shown in Viedoc Connect.

1.1 Prerequisites

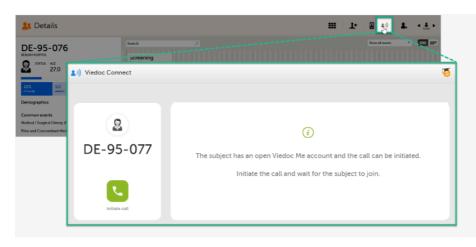
To use Viedoc Connect:

- the feature must be encluded in the study license
- the feature must be enabled in Viedoc Admin
- the subject must have an open Viedoc Me account

Notel For information about supported versions of iOS and Android, and other system requirements for Viedoc Connect use, please refer to <u>System requirements</u> for the Viedoc system and <u>Supported Browsers & Devices</u> for information about the desktop and mobile browsers and devices supported by the Whereby platform.

# 2 Opening Viedoc Connect

To open Viedoc Connect, select the icon on the Selection page. Viedoc Connect opens in a new tab:



#### 3 Initating a call

To initiate a call, click the green phone icon.

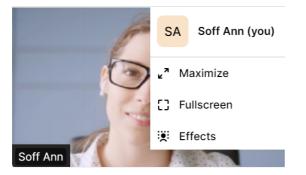
When the subject joins the call, you will see the following view:



1. To show the screen settings on the site user screen (you), hover over the screen:



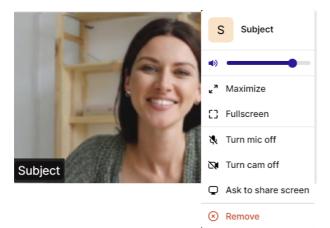
- Select Pop out to move the screen of you to the bottom right corner.
- Select **Spotlight** to put the spotlight on you.
- Select the three dots to show more settings:



- Select your name to edit it.
- Select **Maximize** to make both screens larger.
- Select **Fullscreen** to make your screen cover the whole screen.
- Select Effects to open a menu with more settings.

2. To show the screen settings on the subject's screen, hover over the screen:

- Select Spotlight to put the spotlight on the subject.
- Select the three dots to show more settings:



- Pull the bar to increase/decrease their volume.
- Select Maximize to make both screens larger.
- Select Fullscreen to make their screen cover the whole screen.
- Select Turn mic off/Turn cam off to disable their microphone/camera. To enable them, click Ask to turn mic on/Ask to turn cam on. The participant will be notified and needs to enable their mic/cam.
- Select Ask to share screen. The participant will be notified to share their screen.
- Select Remove to end the call with the participant.
- 3. Camera settings select to turn off the camera. Hover to see more camera settings.
- 4. Microphone settings select to mute. Hover to see more microphone settings.
- 5. Screen settings select to share your screen.

6. Picture-in-picture - select to continue the video call with a remotable screen that will be shown even if you switch tabs. Hover over the mini-screen and select **Back to tab** to return to the Viedoc Connect main screen.

<u>4</u> Details					<u>:</u> •	<b>2.</b> )) <b>2.</b> , ◀ <u>2</u> <sub>3/256</sub> ►
DE-95-077		Search			Show all	events *
STATUS AGE Ongoing 41.1		Screening	Baseline	Follow-Up test	Final Visit End of Study	Unscheduled
		14 07 2021	16 07 2021	23 07 2021	26 07 2021	16 09 2021
32% 5/5 of study events	9/28 forms	Unschedule				Protocol date
Demographics				744	CD4 1777	not set
Common events	DM CRA SOV 🔒 🗸	Event date			<sup>64</sup> <sup>55</sup> A 🔽	
Medical / Surgical History (2)	+	Assessments				
Prior and Concomitant Medications (1) +						Back to tab
Adverse Events (1) +						
Subject's non-study medications (0) Subject's adverse reactions (0)						

- 7. eLearning select to open this lesson whenever you need help with Viedoc Connect.
- 8. End call button select to end the call.

#### 4 Troubleshooting

When launching Viedoc Connect, your browser may notify you to enable your microphone and camera.

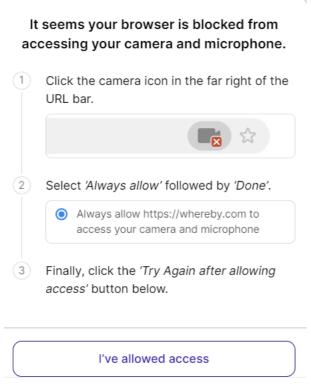
To enable access to your microphone and camera, select Allow:

viedoc.net wants to

×

- Use your microphone
- Use your camera





Follow the instructions and select I've allowed access to enter Viedoc Connect.



#### **Receiving Documents with Viedoc Share**

#### **Receiving Documents with Viedoc Share**

Published by Viedoc System 2025-02-18

1. Reviewing and signing documents 2. Replying to notes

**3. Downloading documents** 

#### 1 Reviewing and signing documents

As a Viedoc Clinic user, documents can be shared with you directly in Viedoc to review and/or sign.

You may receive:

- A document that can be viewed, but does not need your signature.
- A document that requires your signature
- A document that requires your signature as a co-signatory, which can only be signed after the other recipient (for example, a study participant) has completed required document fields and/or signed the document first. The participant also has the option to add notes to ask questions, which you can reply to directly in the document (see replying to notes).

To review and sign documents:

1 If a document has been shared with you, you will receive an email notification similar to this example:

#### viedoc

.

A document has been shared with you in Viedoc by Please click the link below to view the document.

This message (including any attachments) contains confidential information intended for a specific individual and purpose, and is protected by law. If you are not the intended recipient, you should delet this message and are hereby notified that any disclosure, copying, or distribution of this message, or the taking of any action based on it, is strictly prohibited.

\* This is an automatically generated email, please do not reply. \*

2 To open the document, select the link in the email.

If you are logged into Viedoc, **Viedoc Share** is displayed with a list of documents that have been shared with you. If you are not already logged in, you will be directed to the login page first.

	viedoc share"	
•	User Study Name Super Investigator (14869) Viebee Me	E•
	Clinical Protocol Form (Revised.pdf Version 1 - Shared 04 Oct 2024 09:13 UTC with Super Investigator (14869) Waiting for your signature	$\rightarrow$
•	Clinical Trial Protocol Form.pdf Version 1 - Shared 02 Oct 2024 13:04 UTC with Super Investigator (14869) Viewed by all (Super Investigator (14869))	$\rightarrow$
	Clinical Trial Protocol Form.pdf Version 1 - Shared 02 Oct 2024 13:04 UTC with Super Investigator (14869) Waiting for your signature	$\rightarrow$
~	Information & Consent Form Version 1 - Shared 02 Oct 2024 11:58 UTC with SE-001-14 Signed by all (Super Investigator (14869), SE-001-14)	$\rightarrow$

The icons displayed to the left of each document indicate a status and any required actions:

•	A <b>blue circle</b> indicates that the document has not yet been viewed, and there are no required signatures.
•	A <b>gray circle</b> indicates that the document has been viewed, and there are no required signatures.
•	An <b>orange flag</b> indicates that the document requires your signature.
~	A green checkmark indicates that the document has been signed.
~	A <b>gray checkmark</b> indicates that the document has been signed by you, but still requires a signature from a co-signatory.

Select the document you would like to open and view.

After you have reviewed the document, select **Choose action** at the top right of the screen. If your signature is required, there will be an option to select **Confirm and Sign**. Notel If you have been designated as a co-signatory, the recipient must sign the document first, before you are able to sign it.

← Back	Clinical Protocol Form (Revised) <ul> <li>Waiting for your signature</li> </ul>	Choose action ↑
95% ~ 🕞 🕀		✓ Confirm and sign
		Details and download
	CLINICAL TRIAL STUDY PROTOCOL DOCUMENT	Log out
	Study Design: This study is a randomized, double-blind, placebo-controlled trial. Participants will be randomized to receive either PlaceboX or a placebo for a 12-week treatment period.	
	Objectives: Evaluate her difficacy of PlaceboX in reducing symptoms of Hypothetical Condition Syndrome (HCS). Assess satility and tolarability of PlaceboX.	
	Clinic Staff Roles:     Staff Role:	
	Study Population: Adults aged 18-85 diagnosed with Hypothetical Condition Syndrome (HCS), Able to provide informed consent. Exclusion Criteria: Known altergy to PlaceboX.	
	Survey Procedures: Screening Vale: Oblain Informationstant. Defain Informationstant. Defain Informationstant. Defain Informationstant. Provide the Information Information Information Provide Information Pr	
	Adverse Event Monitoring: The Dilignet Clinic Staff will monitor participants for any adverse effects of PlaceboX and report to the Super Investigator within 24 hours of dentification. All adverse events will be recorded in the Adverse Event Log and reported to the invitivant althorities are gradiellines. Data Management: All participant data will be managed by the Stdekk Data Manager. Data integrity and confidentiality	
	will be ensured throughout the study, and data will be securely stored in the clinic's database. Ethod opcondentations: This study will be concluded in compliance with Good Chinical Peadation (GCP) guidelines and relevant regulatory requirements. Personnel with the opcondent of their rights, and the study protocol will be approved by the nelevant ethois committee point to instation.	
	For more information about Pis study, desse contact: Sworpfs Madrice Research Institution Phone: (123) 456-7850   Email: <u>samplestudy/thyledoc.com</u>	

#### 5 Select Confirm and Sign.

6 Select the round button to the left of the confirmation statement and a green check mark will appear. select **Sign using one-time code**.



7 A one-time passcode with six numbers will be sent to you via email or text message. Check the message and enter the code. Select **Verify**.

Confirm and sign
Confirm that you have reviewed the document
I have read and understood the contents of the file.
Verify your signature with the one-time code sent to you by email or SMS
One-time code

4

Signature details will be displayed, confirming that you have signed the document.



9 Close this popup to return to the document view.

#### 2 Replying to notes

Documents that are shared with a recipient and a co-signatory have the option for users to add and reply to notes. For example if a study participant has a question on a document, they can add a note to the document, and the co-signatory can reply to the note.

To reply to a note:

8

- 1 Navigate to the document by clicking on the link in the email you received, and/or selecting the document from the document list in Viedoc Share (see section 1 above).
- 2 Select the **Comments** icon on the top right of the document screen, or select the comment icons directly in the document. The notes added by the participant will be displayed on the right side of the screen:

Back     Subject Understanding & Consent.pdf	Choose action ↓
► Waiting for recipients signatures	
S	earch comments
Sample Demo Study Co Subject Understanding and Consent Sor	rt: Position Y
Please select each statement that is TRUE: Page	ge 1
I have read the study protocol and understand its contents.	F TUL310 Jan 28, 7:21 PM
A member of the study team explained the study protocol and procedures to me in detail.	I have a question
I had the opportunity to ask questions, and I received satisfactory answers.	This is my response
Please select whether you would like to participate in the demo study:	FUL310 Jan 28, 7:58 PM I have another question.
Yes, I agree to participate in the study	
No, I do not agree to participate in the study	
Please fill in your name and today's date:	
Your First and Last Name: Today's Date (MM/DD/YYYY):	
lf you have any questions, please reach out to your contact person at Sample Demo Study.	

- **3** Select the comment and type your reply. Select the **Send** icon to the right of the text field when you are finished.
- 4 To edit your reply, select the **options menu** to the right or your text and select **edit**. Edit your text and select **Send** when you are finished.

F	TUL310 Jan 28, 7:58 PM I have another question.
	Super Investigator (14869) Jan 28, 8:37 PM Here's a response to yp Edit question!
Add r	eply >

# 3 Downloading documents

Whether or not the document requires a signature, you can download a copy of the document.

To download a copy of the document:

#### 1 While viewing the document select **Choose action** at the top right, and select **Details and download**:

	Clinical Protocol Form (Revised) ✓ Signed by all (Super Investigator (14869))	Choose action	Ŷ
$\ni \oplus$		Details and download	
		Log out	
	CLINICAL TRIAL STUDY PROTOCOL DOCUMENT		
	Study Design: This study is a randomized, double-blind, placebo-controlled trial. Participants will be randomized to receive either Placebox or a placebo for a 12-week treatment period.		
	Objectives: Evaluate the efficacy of PlaceboX in reducing symptoms of Hypothetical Condition Syndrome (HCS). Assess safety and tolerability of PlaceboX.		
	Clinic Staff Releat: Super Investigator: Responsible for overseeing all study procedures, data integrity, and compliance with protocol.  Diamet Clinic Staff: Bravers proper participant enrolment, medication dispensing, and data collection.  Subscript Population: Study Population: Addits and 18:65 filenomed with Honothetical Condition Superiore (HS).		

Sharing details and document history are displayed. Under the details select the green **Download** button to see the options available for downloading:

← Back	Clinical Protocol Form (Revised) ✓ Signed by all (Super Investigator (14869))	Choose action ↓
80%	· A A	Q
Sharir	ng details	×
pdf	Clinical Protocol Form (Revised)         Binder Id: 468       Document version: 2       Version date: 01 Nov 2024         Original file name: Clinical Trial Protocol Form.pdf         File date: 02 Dec 2024 14:24       File size: 110.2 KB       File integrity: beA6HyuT         No of recipients: 1       Signature required: Yes       No of co-signatories: 0	hKPmqupurwy/ew==
	✓ Signed by all	L Download
	History Document viewed 02 Dec 2024 14:55 by Super Investigator (14869) Signed 02 Dec 2024 14:32 by Super Investigator (14869) Reason: I have read and understood the contents of the file. Document viewed 02 Dec 2024 14:28 by Super Investigator (14869)	Download original file Download with sharing details Download with signatures
	Document shared 02 Dec 2024 14:26 by Super Investigator (14869) File: Clinical Trial Protocol Form.pdf	

The following options are available for downloading the document:

- **Download original file**: will download a copy of the original document. Any fields (ie. radio buttons, checkboxes or text fields to be filled in by the participant) in the document will be empty in this version.
- **Download with sharing details**: will download a zipped folder which contains a copy of the original document, and a separate file with sharing details, document history, and any fields filled in by the participant.
- **Download with signatures**: will download a copy of the document which includes a cover page containing signature details. Any fields completed by the participant will also be visible in this version. (Notel this option is only available if ALL of the required recipients and co-signatories have signed the document).
- **Download with notes**: will download a copy of the document which contains any notes added to the document, as well as any completed fields.
- **3** Select an option to begin the download.



Site User training video

## Site User training

Published by Viedoc System 2022-05-06

This video is an introduction to Viedoc Clinic for the Site User.



Create a user account

#### Create a user account

Published by Viedoc System 2018-11-12

This video walks you through the process of creating a Viedoc user account.



Log in/Log out and reset password

## Log in/Log out and reset password

Published by Viedoc System 2019-11-14

This video shows how to log in/log out to/from Viedoc and how to reset your password.



Landing page

# Landing page

Published by Viedoc System 2018-11-07

This video provides a quick overview of the landing page as well as of the study start page.



Add and select subjects

# Add and select subjects

Published by Viedoc System 2018-11-07

This video provides a quick overview of the subjects **Selection** page and shows how to add new subjects.



Initiate and add visits

## Initiate and add visits

Published by Viedoc System 2018-11-07

This video demonstrates how to initiate a visit in Viedoc, as well as how to add an unscheduled visit.



Enter data

## Enter data

Published by Viedoc System 2018-11-07

This video demonstrates how to enter data in Viedoc, including filling in various data types and confirming data as missing.



# <sup>Sign data</sup>

Published by Viedoc System 2018-11-07

This video demonstrates how data can be signed by the Investigator, using the signing console.



Issues: Resolve a query

## Issues: Resolve a query

Published by Viedoc System 2018-11-07

This video demonstrates how to resolve a query in Viedoc.



Activate demo mode

#### Activate demo mode

Published by Viedoc System 2018-11-07

This video demonstrates how to switch between demo and production mode within a study.



Enter reference data

### Enter reference data

Published by Viedoc System 2019-01-07

This video demonstrates how to enter reference data in Viedoc Clinic.



Monitor training video

# Monitor training video

Published by Viedoc System 2021-05-05

This is a Viedoc introductory video for monitors.

#### Viedoc eLearning © PCG Solutions 2009-2025

No part of this user guide may be modified, copied or distributed without prior written consent from Viedoc Technologies. The information contained herein is subject to change without notice. Viedoc Technologies shall not be liable for technical or editorial errors or omissions contained herein.

Version 2.1