






## Viedoc User Guide for Site Users

34 Lessons   ■ 34 from Viedoc System









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Overview of Viedoc Clinic

# Overview of Viedoc Clinic

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## [1. Introduction](#)

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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.

The screenshot displays the Viedoc Clinic interface for a study named 'DE-95-077' at 'BERLIN HOSPITAL'. The top navigation bar shows the user is logged in as 'Soff Ann' with the role of 'Investigator'. The main content area is divided into several sections:

- Study Overview:** Shows the study ID 'DE-95-077', status 'Ongoing', and age '41.1'. It also displays progress metrics: '29% of study', '4/4 events', and '8/27 forms'.
- Demographics and Events:** Lists categories like 'Common events', 'Medical / Surgical History (2)', 'Prior and Concomitant Medications (0)', 'Adverse Events (0)', and 'Subject's non-study medications (0)'. Each category has a status indicator (DM, CRA, SDV) and a checkmark.
- Calendar View:** A horizontal timeline showing key events: 'Screening' (14 07 2021), 'Baseline' (16 07 2021), 'Follow-Up test' (23 07 2021), and 'Final Visit' (26 07 2021).
- Screening Details:** A section titled 'Screening' with an 'Ongoing' status. It lists specific events: 'Event date', 'Check Questions', and 'Physical Examination', each with its own status indicators.
- Task List:** A yellow box on the right lists tasks: 'Protocol date not set', 'Scheduled date not set', and 'Event date 14 07 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](mailto: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 [Managing your Viedoc account](#).

The following main actions can be performed in Viedoc Clinic:

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

## 2 Languages

Viedoc Clinic is available in the following languages:

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



System requirements

# System requirements

Published by Viedoc System 2022-06-16

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## [1. Customer computer requirements](#)

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[1.3 Internet connection](#)

[1.4 Firewall policy](#)

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## 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.

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## 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.



Managing your Viedoc account

# Managing your Viedoc account

Published by Viedoc System 2024-03-18

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## [2. Study access management](#)

## [3. Access settings](#)

### [3.1 Study membership](#)

### [3.2 Deleting study access](#)

### [3.3 Deleting your Viedoc account](#)

## [4. Pending invitations](#)

### [4.1 Approving a study invitation](#)

### [4.2 Rejecting a study invitation](#)

### [4.3 Postponing the approval/rejection of a study invitation](#)

## [5. Logging out](#)

## 1 Introduction

All information related to managing your Viedoc account can be found in the following user guide: [Viedoc User Account Management](#)

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**.

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

viedoc

User Settings

▲ Ownership of +4812345678 has not been verified!

User name  
This is used to log in to Viedoc

doctordemo@viedoc.com

First name      Last name

Doctor      Demo

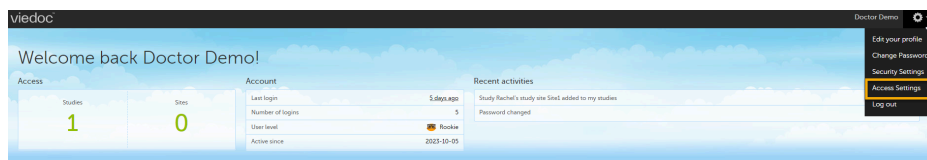
Display name  
This is your Viedoc user name

Doctor Demo

## 2 Study access management

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

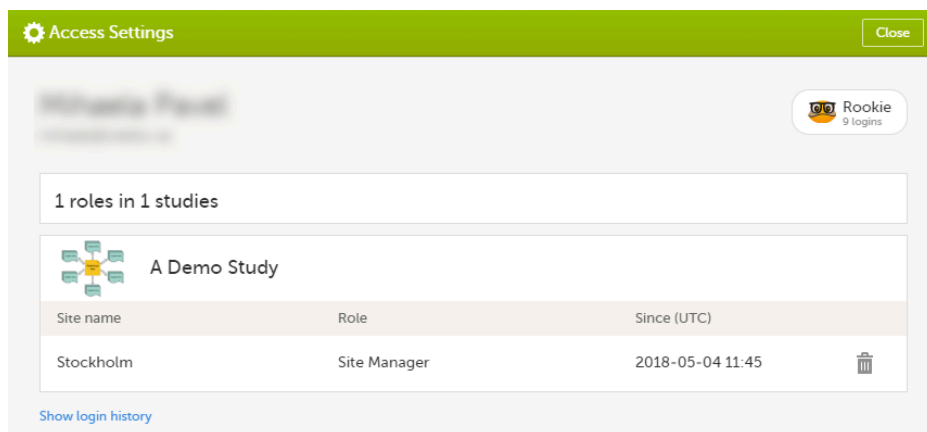




### 3 Access settings

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

#### 3.1 Study membership



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](#))

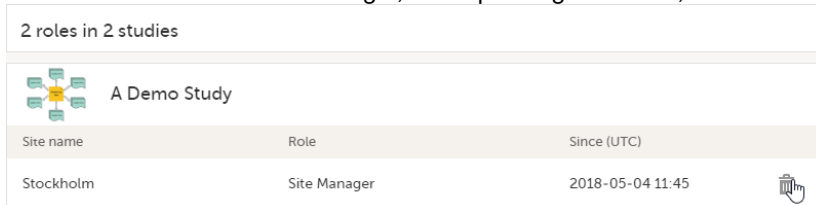
For users with organization roles, these are listed in the top of the page, in a separate section, providing the following information:

- **Organization name**
- **Role**
- **Since (UTC)** - the date and time when the membership was approved, in [UTC](#)

#### 3.2 Deleting study access

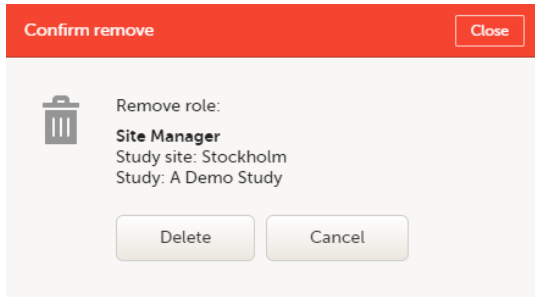
To remove yourself from a certain role within a study:

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



A confirmation dialog is displayed.

2 Select **Delete** to confirm the deletion:



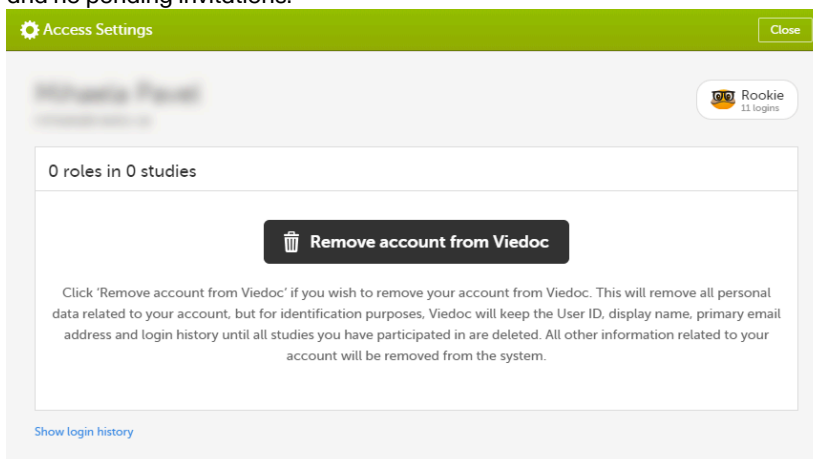
A notification email will be sent to all the Study managers, or to the Site managers if any roles are delegated.

### 3.3 Deleting your Viedoc account

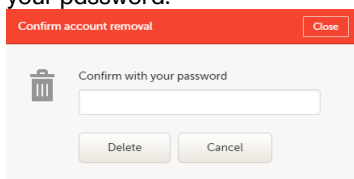
You can remove your Viedoc account when you have no study memberships left, that is, 0 roles in 0 studies.

To delete your Viedoc account:

1 Go to **Access Settings**. To be able to remove your account, you should have no roles left in any study and no pending invitations:



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



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



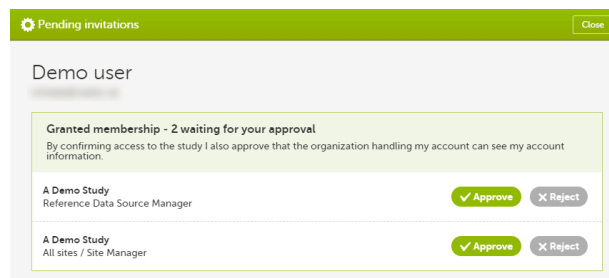
**Thank you and goodbye!**

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.

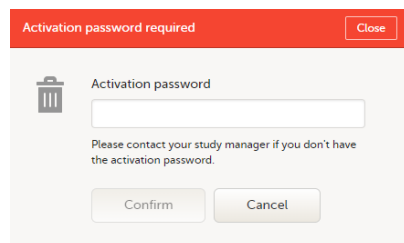
## 4 Pending invitations

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:



### 4.1 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:



**Note!** All the pending role invitations for a user are automatically approved when the Application Programming Interface (API) method `GetToken / Token` is used.

### 4.2 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.

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

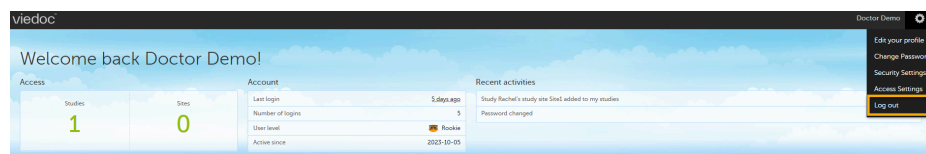
To postpone the approval or rejection of study invitations, select **Close** in the top right corner of the **Pending invitations** dialog box and postpone providing an answer to the study invitation.

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.

## 5 Logging out

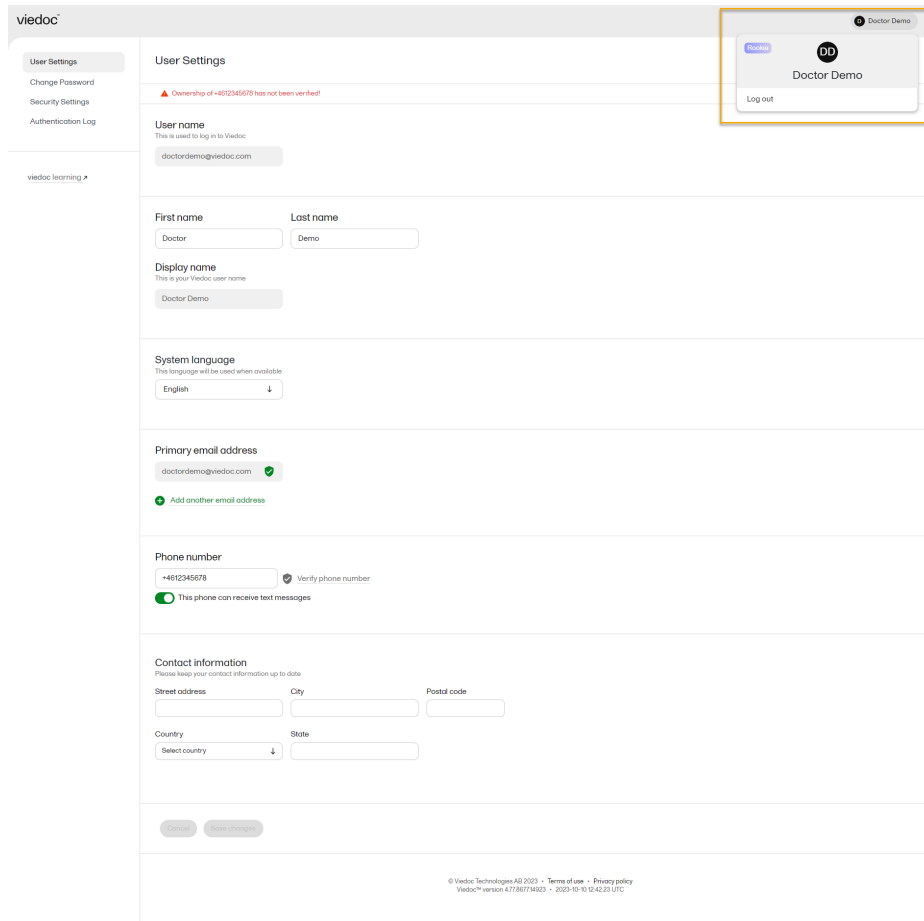
From Viedoc you can log out from different locations:



- 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**.



The screenshot shows the Viedoc user settings interface. On the left is a sidebar with navigation options: User Settings (selected), Change Password, Security Settings, and Authentication Log. The main content area is titled 'User Settings' and contains several sections: a warning about unverified ownership, a 'User name' section with the email 'doctordemo@viedoc.com', 'First name' (Doctor) and 'Last name' (Demo) fields, a 'Display name' field (Doctor Demo), a 'System language' dropdown (English), a 'Primary email address' field (doctordemo@viedoc.com) with an 'Add another email address' link, a 'Phone number' field (+4812345678) with a 'Verify phone number' link and a 'This phone can receive text messages' toggle, and a 'Contact information' section with fields for Street address, City, Postal code, Country, and State. At the bottom are 'Cancel' and 'Save changes' buttons. A user profile dropdown menu is highlighted in the top right corner, showing the user's name 'Doctor Demo' and a 'Log out' option.

viedoc

User Settings

Change Password  
Security Settings  
Authentication Log

viedoc learning

User Settings

Ownership of +4812345678 has not been verified!

User name  
This is used to log in to Viedoc  
doctordemo@viedoc.com

First name  
Doctor

Last name  
Demo

Display name  
This is your Viedoc user name  
Doctor Demo

System language  
This language will be used when available  
English

Primary email address  
doctordemo@viedoc.com  
Add another email address

Phone number  
+4812345678  
Verify phone number  
This phone can receive text messages

Contact information  
Please keep your contact information up to date

Street address  
City  
Postal code

Country  
Select country  
State

Cancel Save changes

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Viedoc™ version 4.7.0/6774/023 • 2023-10-10 12:42:23 UTC

Doctor Demo  
Log out

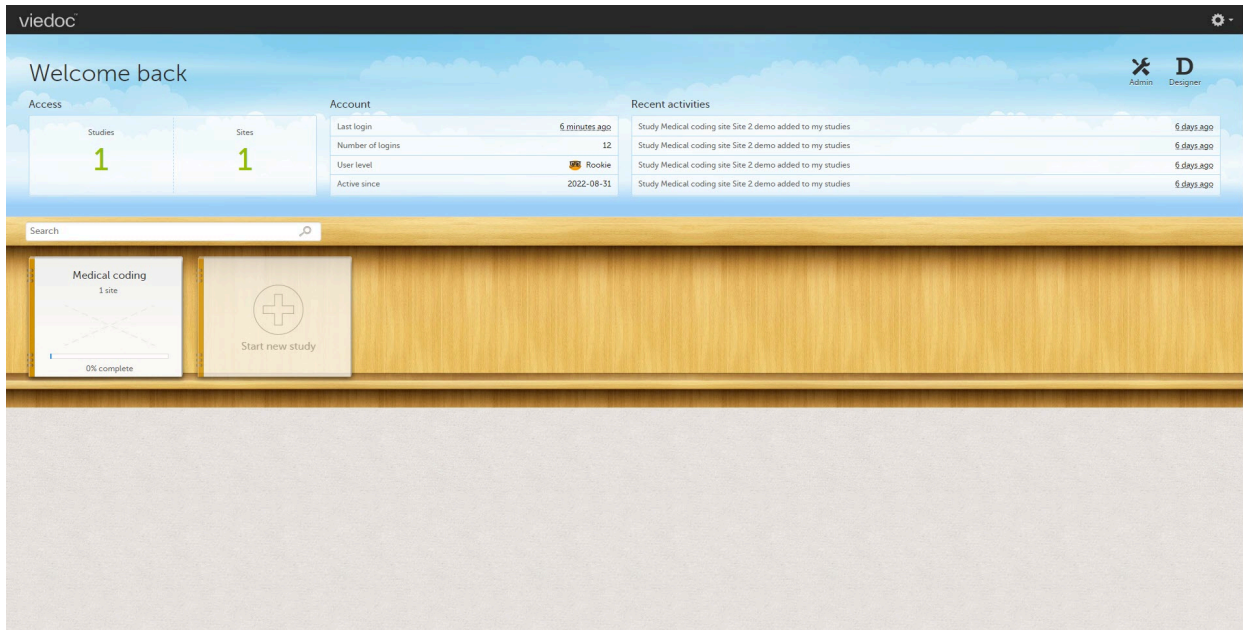


Overview of the landing page

# Overview of the landing page

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



The landing page provides the following summary information:

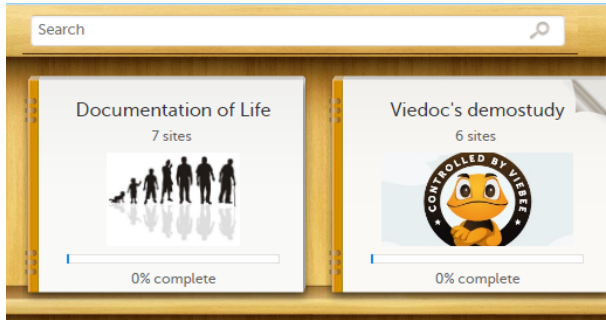
- **Access**
  - **Studies** - the total number of studies you have access to
  - **Sites** - the total number of sites you have access to
- **Account**
  - **Last login** - the time passed since the last time you have logged in to Viedoc
  - **Number of logins** - the total numbers of logins to Viedoc 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	Icon	Description
Rookie		≤ 20 logins
Semi-pro		21-100 logins
Pro		101-1000 logins

Skill level	Icon	Description
Legend		> 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.



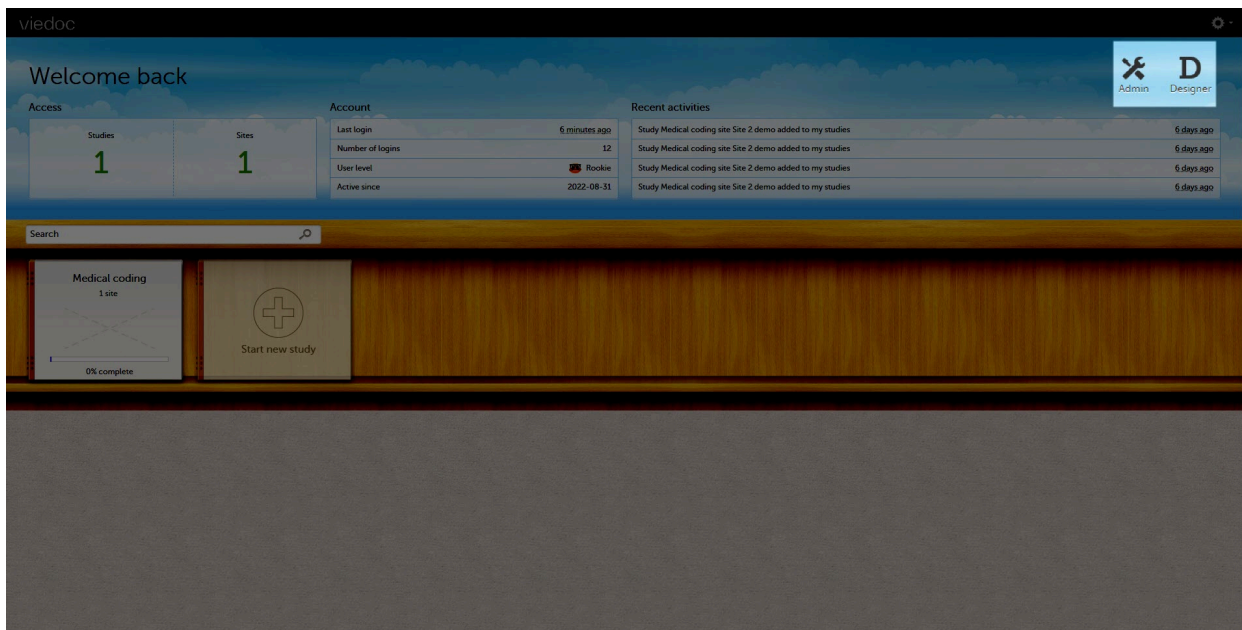
A progress bar is shown below each study logo. The percentage displayed is calculated by the mean completion of each subject (rounded down). Thus, it measures the total completion of the study.

#### Note!

- 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 [Study start page](#).

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:





Approving eCRF changes

# Approving eCRF changes

Published by Viedoc System 2021-11-24

- [1. Introduction](#)
- [2. How a change is flagged and how to approve](#)
- [3. What happens if I don't do anything?](#)
- [4. Who can approve?](#)

## 1 Introduction

Changes to the electronic Case Report Form ([eCRF](#)) 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 [study start page](#), 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... 6 months ago by System

By clicking on the message, a detailed text is shown, that summarizes the changes to the [eCRF](#) 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.

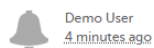
The forms affected by the upgrade are marked with an issue flag (the red [i] icon). A summary of the affected forms can be viewed in the Selection page, by selecting the **ISSUES** view and filtering from the drop-down list in the upper right corner by **Form upgrade pending**:

The screenshot shows the Viedoc Selection interface. At the top, there's a search bar and a '2 ISSUES' badge. Below is a table with columns: ID #, REFERENCE #, ISSUE DETAIL #, CONFIRMATION #, and STATE #. Two rows are visible, both for 'SE-Uppsala:2-016' with a 'Pending form upgrade' status. A dropdown menu on the right shows 'Form upgrade pending'.

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:

The screenshot shows a notification banner: '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.' Below the notification is the form title 'CBC LAB Results (Hematology)' with various icons and a 'SHOW HISTORY' button.

It is also possible to batch approve all affected forms at once by typing in your password and clicking **Confirm** in the upgrade message pane:



A change to the structure of one or more forms on Karolinska University Hospital has been requested by the study team. The change(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:  
Update on the SAE form.

message to sites, entered by Study Manager, 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.

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:

- 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.

### 4 Who can approve?



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.



Study start page

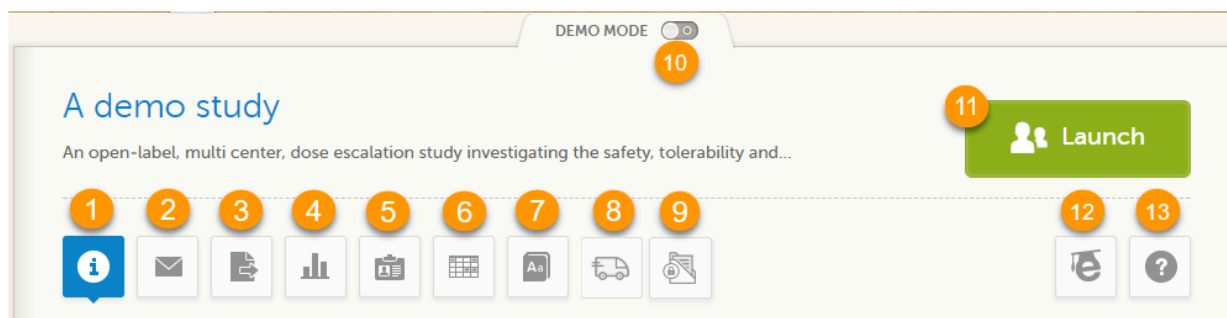
# Study start page

Published by Viedoc System 2023-10-09

- [1. Introduction](#)
- [2. Study status](#)
- [3. Messages](#)
  - [3.1 Alert messages](#)
- [4. Data export](#)
- [5. Metrics and Viedoc Reports](#)
- [6. Roles](#)
  - [6.1 My roles](#)
  - [6.2 All roles and users for my site\(s\)](#)
    - [6.2.1 User logs](#)
      - [6.2.1.1 Log of users and roles in PDF format](#)
      - [6.2.1.2 User administration log in Excel format](#)
- [7. Reference data](#)
- [8. Medical coding](#)
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- [10. Viedoc eTMF](#)
- [11. Demo mode](#)
- [12. Launch](#)
- [13. eLearning / Documentation & Training](#)
- [14. Support](#)

## 1 Introduction

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:



- [1. Study status](#)
- [2. Messages](#)
- [3. Data Export](#)
- [4. Metrics and Viedoc Reports](#)
- [5. Roles](#)
- [6. Reference data](#)
- [7. Medical coding](#)
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- [9. Viedoc eTMF](#)
- [10. Demo mode](#)
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## Notes!

- 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:

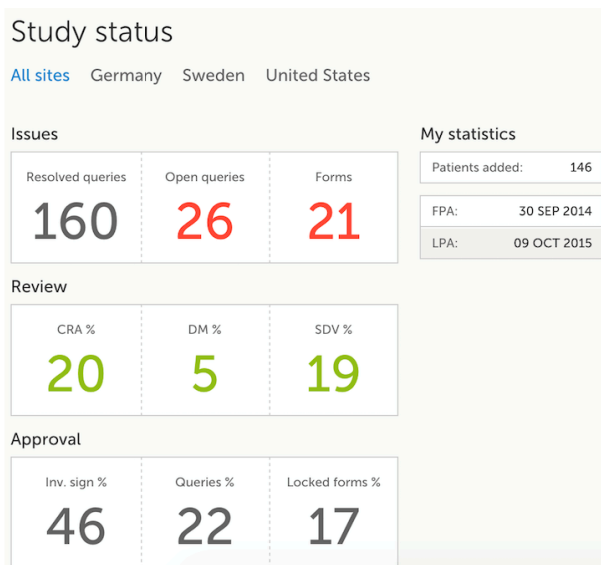
- If you have mandatory documentation pending to be read and signed, then the first page that opens is the [Documentation & Training](#).

**Important!** 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.

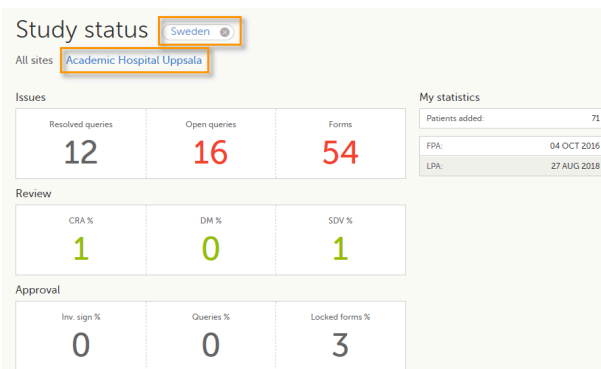
- If you do not have any mandatory documentation pending signing, then the first page that opens is the Study status page.

## 2 Study status

The Study status page is the first page that is shown when accessing a study, if you do not have any mandatory documentation and training material that needs to be signed. 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):



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



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

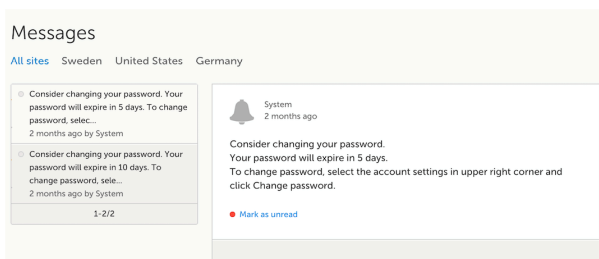
- Review
  - **CRA %** - percentage of forms that were marked as Clinical Research Associate ([CRA](#)) reviewed out of total number of forms that can be CRA reviewed within the study
  - **DM %** - percentage of forms that were marked as DM reviewed out of total number of forms that can be DM reviewed 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

**Note!** All the numbers reflect the data entered in the selected operation mode (demo or production), that is, if demo mode is selected, then the numbers reflect only the data entered in demo mode.

## 3 Messages

A message can either be a system message (such as notifications on password expiration), a study message (such as eCRF changes - for more information, see [Approving eCRF changes](#), 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.

Submit

## 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](#))

**Note!** 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.

**Note!** Metrics might not be available to all users.

For a detailed description, see [Metrics](#).

If Viedoc Reports is included in the study license and enabled, it is accessed from the Metrics feature. For more information, see [Launching Viedoc Reports](#).

## 6 Roles

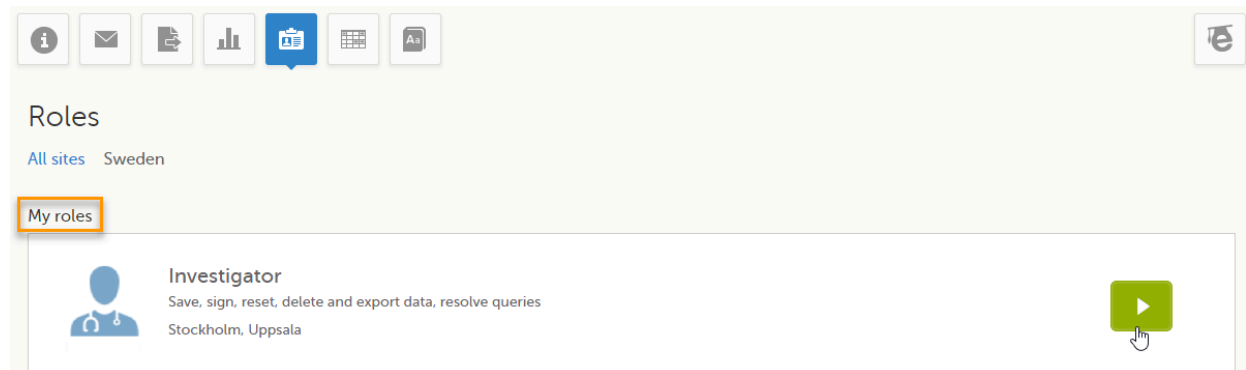
**Note!** The Roles page is only available for users with special permission to view roles, as per the study design.

The Roles page provides information on:

- The roles that are assigned to you, see [My roles](#)
- All the roles for the sites you have access to, see [All roles and users for my site\(s\)](#)

### 6.1 My roles

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





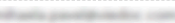



The following information is displayed (with *examples*):

- 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:

All roles and users for the sites I have access to			
 2 Investigator(s) <span style="float: right;">Hide log ▾</span>			
User/Site	Access granted	Access revoked	Data edits/Sessions
Mihaela Pavel (362),  Group: All sites	2018-04-05 12:22 UTC Doctor Demo	-	0 0
Doctor Demo (317),  Multiple sites	2017-08-11 12:37 UTC Doctor Demo	-	143 77
 1 Monitor(s) <span style="float: right;">Show log ▾</span>			
 1 Data Manager(s) <span style="float: right;">Show log ▾</span>			
 <a href="#">Download log of users and roles as a PDF file</a>			

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:



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 [Working with reference data](#).

**Note!** 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](#).

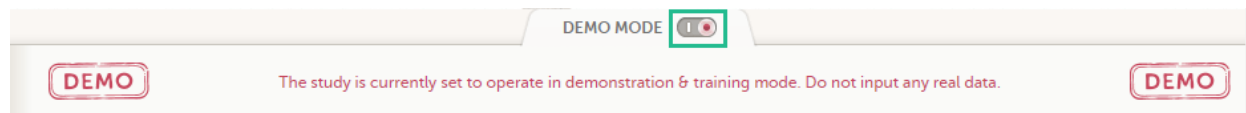
## 10 Viedoc eTMF

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:



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 ([eCRFs](#)). 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

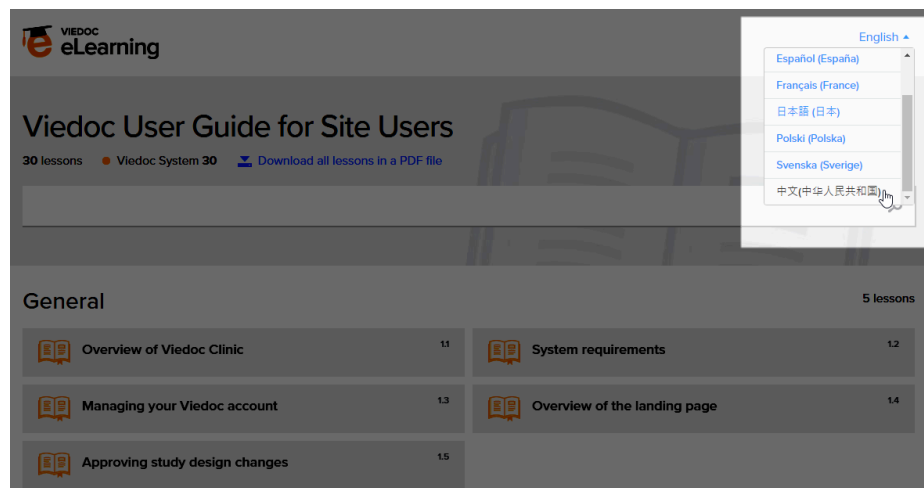
If you have mandatory documentation pending to be read and signed, this is the first page that is displayed when you access the study.

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 [Documentation & Training](#).

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:



**Tip!** 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.



# 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:

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.

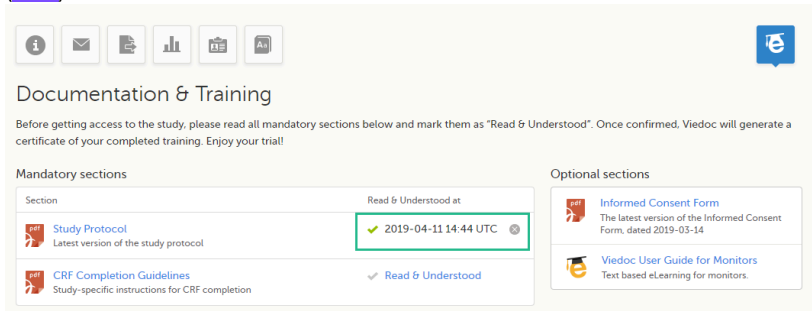
**2. Optional sections** - contains additional educational and reference materials that you have access to. Simply click on the link to open each of the available documents/links.

## 2 Becoming a certified user

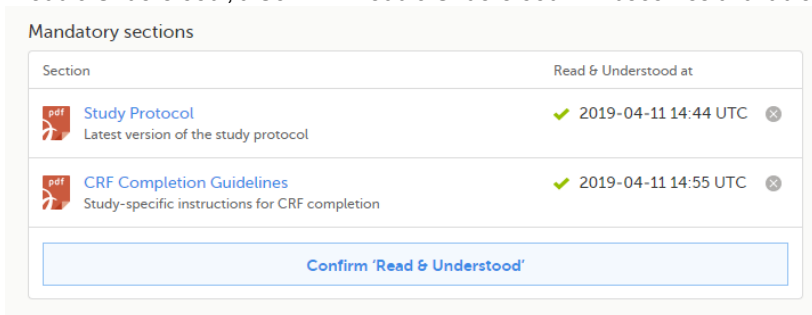
To work within a study for which mandatory training sections were assigned, you need to read, understand and sign all the sections listed as mandatory.

To obtain the user certificate:

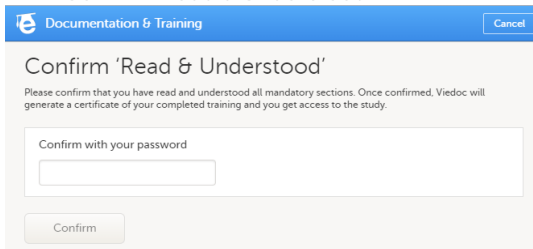
- 1 Click the link to open the section. Read through and, when you're done, go back to the Documentation and Training page and click **Read & Understood**. A date and time stamp in Coordinated Universal Time (UTC) will be shown in the **Read & Understood at** column:



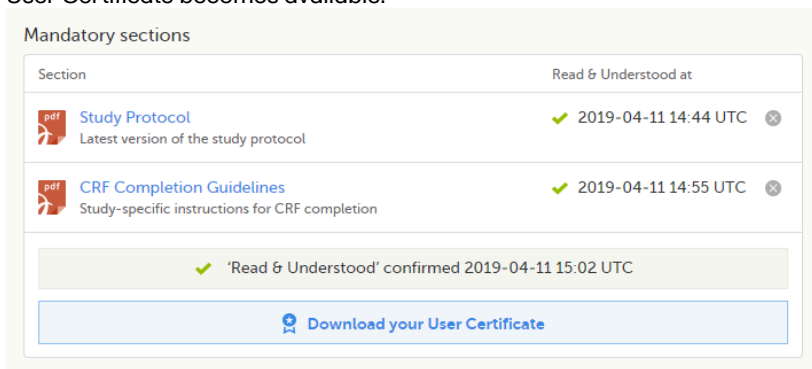
- 2 Repeat step 1 for each of the mandatory sections. When all the mandatory sections are marked as "Read & Understood", a Confirm 'Read & Understood' link becomes available:



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



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



- 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"



Selection page

# Selection page

Published by Viedoc System 2023-10-09

## 1. Introduction

[1.1 Sorting and filtering](#)

[1.2 Searching](#)

[1.3 Icons](#)

## 2. Views of the Selection page

[2.1 The Cards view](#)

[2.1.1 The subject card overview](#)

[2.2 The issues view](#)

[2.3 The Viedoc Me view](#)

[2.4 The Events view](#)

## 3. Adding a new subject

# 1 Introduction

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

Subject ID	Hospital	Status	Age
SE-KI-004	KAROLINSKA INSTITUTE STOCKHOLM	Screened	51.2
SE-KI-003	KAROLINSKA INSTITUTE STOCKHOLM	Screened	27.9
FI-HU-005	HELSINKI UNIVERSITY HOSPITAL	Screened	26.9
SE-UU-002	UPPSALA UNIVERSITY HOSPITAL	Screened	58.2
FI-HU-004	HELSINKI UNIVERSITY HOSPITAL	Screened	37.1
FI-HU-003	HELSINKI UNIVERSITY HOSPITAL	Screened	29.1
FI-HU-002	HELSINKI UNIVERSITY HOSPITAL	Screened	30.6
SE-UU-001	UPPSALA UNIVERSITY HOSPITAL	Screened	38.8
FI-HU-001	HELSINKI UNIVERSITY HOSPITAL	Screened	35.0
SE-KI-002	KAROLINSKA INSTITUTE STOCKHOLM	Screened	50.9
SE-KI-001	KAROLINSKA INSTITUTE STOCKHOLM	Screened	36.7

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 [Views of the Selection page](#).

## 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.

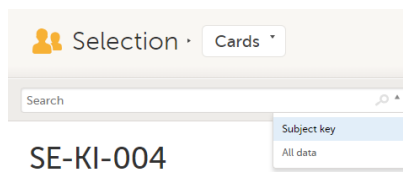
Show all sites    Sort by added date

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:

Gender	ID	Status	Age
	SE-KI-004	Screened	51.2
	SE-KI-003	Screened	27.9
	FI-HU-005	Screened	26.9
	SE-UU-002	Screened	58.2
	FI-HU-004	Screened	37.1
	FI-HU-003	Screened	29.1
	FI-HU-002	Screened	30.6
	SE-UU-001	Screened	38.8
	FI-HU-001		35.0
	SE-KI-002	Screened	50.9
	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:



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

**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.





**Note!** 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:

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

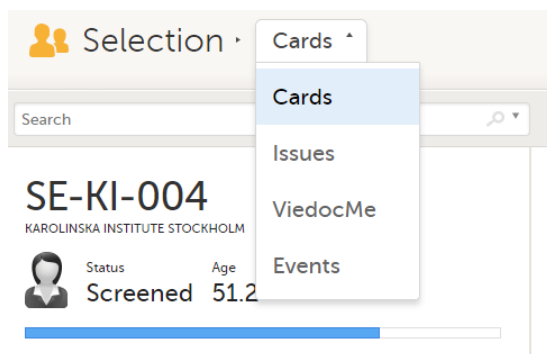
Icon	Description
	<b>Signed</b> - all data that is possible to sign has been signed
	<b>Read-only</b> - the card is being open for edit by another user. Note that the subject card can still be accessed for review or SDV by a user without edit permissions, for example a monitor or a data manager.
	<b>In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

**Note!** 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.

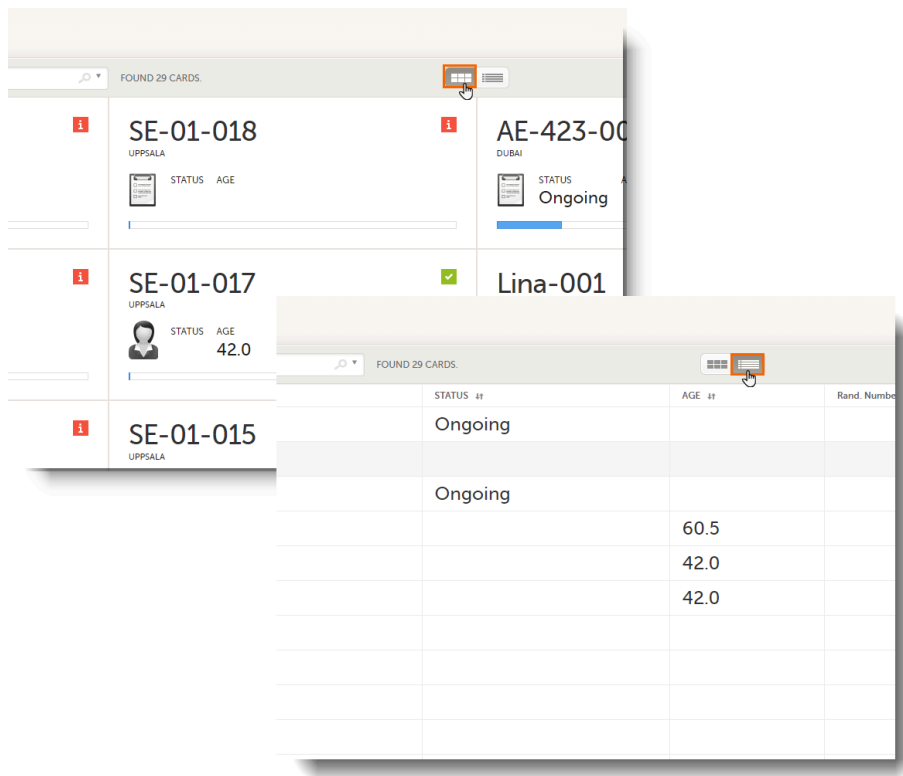
- If the study is configured with extended selection pages, you can select a view at the top of the page. Select **Cards**, **Issues**, **Viedoc Me** or **Events** from the dropdown menu to open the view. The Viedoc Me view is only available to select if the Viedoc Me feature is included in your study.



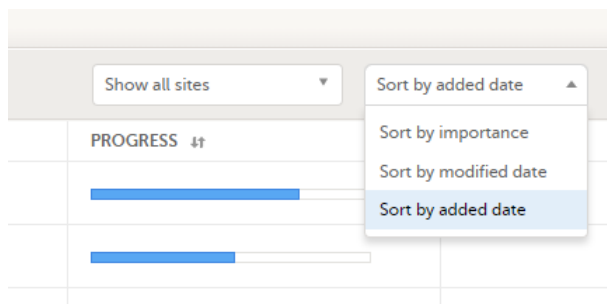
- If the study is not configured with extended selection pages, you can select between the views **Cards** and **Issues** by clicking the buttons next to the search field.

### 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:

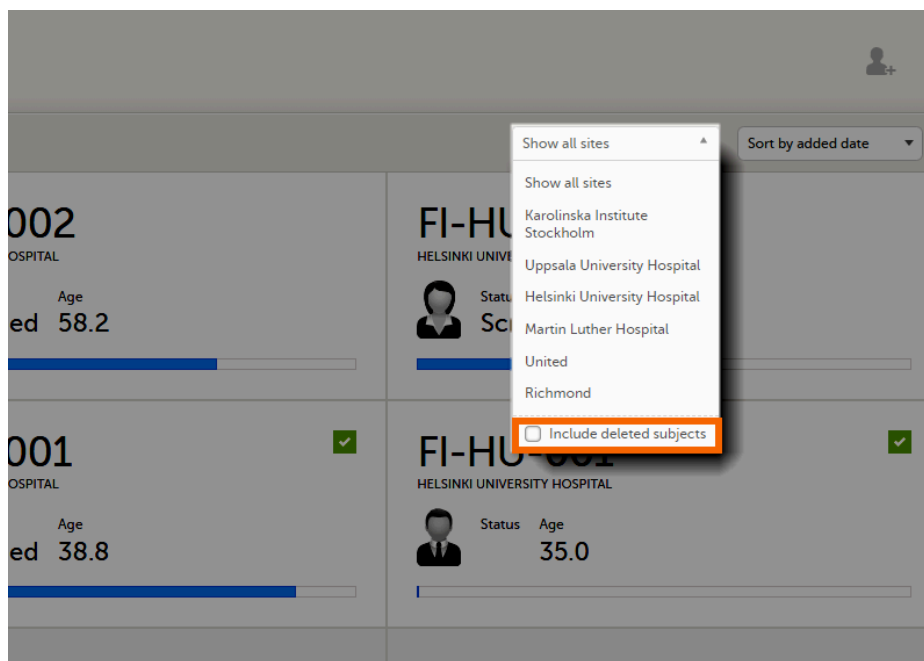


The subjects are sorted by added date, where the most recently added subject is displayed first. You can sort the subject cards by selecting an option in the upper right corner:



- **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:



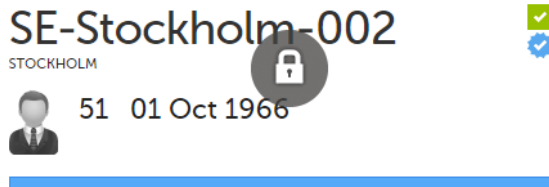


## 2.1.1 The subject card overview

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

- Subject ID
- Site name
- Gender indicated by an avatar
- Some [CRF](#) 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)

**Note!** 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 [Entering and Editing data](#) for more information on the subject details view.

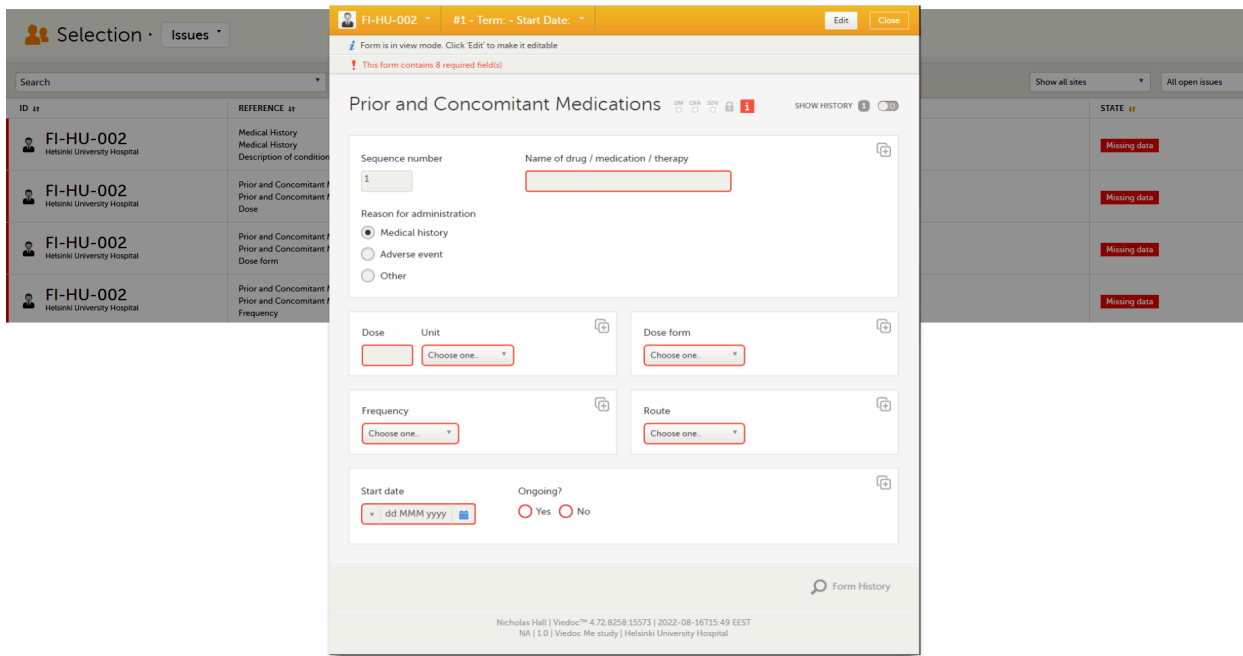
## 2.2 The issues view

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

The screenshot shows the 'Issues' view in the Selection page. It features a search bar, a dropdown menu for 'Issues', and a table with 9 issues. The table has columns for ID, REFERENCE, ISSUE DETAIL, CONFIRMATION, and STATE. All issues are marked as 'Missing data'.

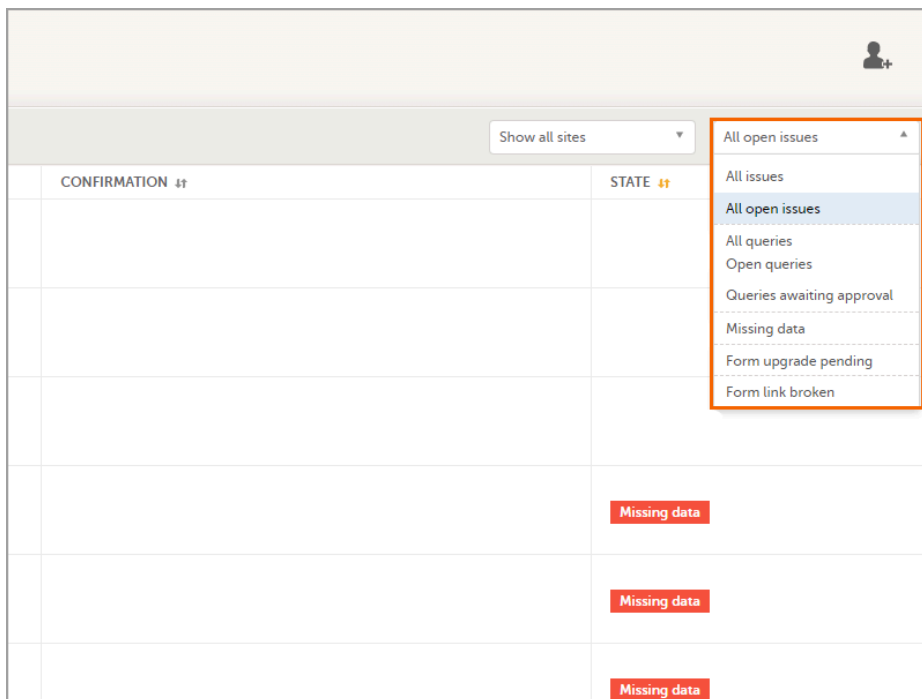
ID	REFERENCE	ISSUE DETAIL	CONFIRMATION	STATE
FI-HU-002 Helsinki University Hospital	Medical History Medical History Description of condition / event / surgery	! Missing data		Missing data
FI-HU-002 Helsinki University Hospital	Prior and Concomitant Medications Prior and Concomitant Medications Dose	! Missing data		Missing data
FI-HU-002 Helsinki University Hospital	Prior and Concomitant Medications Prior and Concomitant Medications Dose form	! Missing data		Missing data
FI-HU-002 Helsinki 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:



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:



- 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.

ID #	# LOGINS (LAST LOGIN) #	COMPLIANCE #	# MISSED EVENTS (LAST MISSED) #	STUDY COMPLETION #	NEXT SCHEDULED #	ACCOUNT STATUS #
SE-KI-004 Karolinska Institute Stockholm	2 2022-06-16 08:31 CEST	50%	1/2 (2022-06-11 00:00 CEST)	100%	-	Open
SE-KI-003 Karolinska Institute Stockholm	1 2022-06-02 11:59 CEST	0%	2/2 (2022-06-02 00:00 CEST)	100%	-	Open
FI-HU-005 Helsinki University Hospital	1 2022-06-01 11:39 EEST	-	-	0%	-	Open
SE-UU-002 Uppsala University Hospital	0	-	-	0%	-	Initiated
FI-HU-004 Helsinki University Hospital	14 2022-06-21 21:15 EEST	100%	0/2 -	100%	-	Open
FI-HU-003 Helsinki University Hospital	0	-	-	0%	-	Initiated
FI-HU-002 Helsinki University Hospital	19 2022-06-16 09:29 EEST	-	-	-	-	Open
SE-UU-001 Uppsala University Hospital	1 2022-05-13 17:18 CEST	-	-	-	-	Open
FI-HU-001 Helsinki University Hospital	14 2022-05-23 19:15 EEST	-	-	-	-	Open
SE-KI-002	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

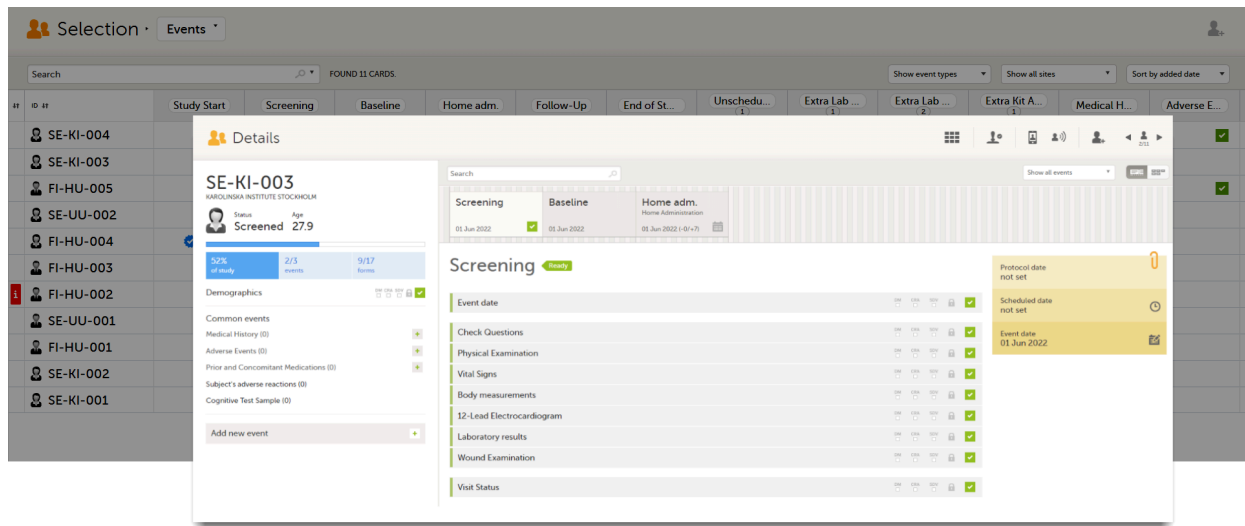
## 2.4 The Events view

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

#	ID #	Study Start	Screening	Baseline	Home adm.	Follow-Up	End of St...	Unschedu... (1)	Extra Lab... (3)	Extra Lab ... (2)	Extra Kit A... (3)	Medical H...	Adverse E...
	SE-KI-004	✓	✓	⌘	⌘			⌘				✓	✓
	SE-KI-003	✓	✓	⌘									
	FI-HU-005	✓	⌘									✓	✓
	SE-UU-002	✓	⌘										
	FI-HU-004	ⓘ	✓	⌘	🔒	✓		ⓘ					
	FI-HU-003	✓	⌘										
!	FI-HU-002	✓	⌘						⌘	⌘		!	
	SE-UU-001	✓	✓										
	FI-HU-001	✓											
	SE-KI-002	✓	✓	⌘	⌘								
	SE-KI-001	✓	⌘	⌘				⌘					

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:



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:

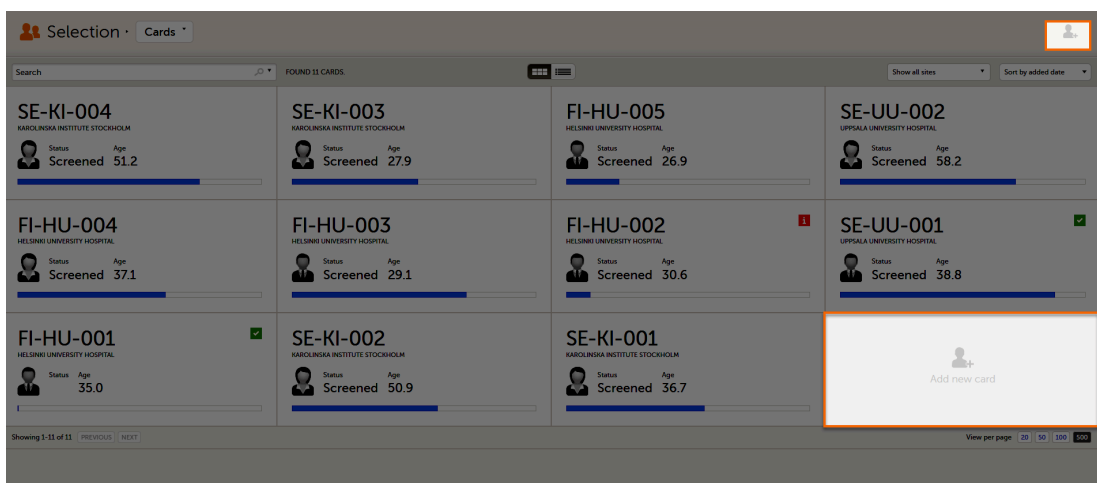
- By event type
  - Scheduled events
  - Unscheduled events
  - Common events
  - Subject-initiated events
- By site - select to view data from a specific site or from all sites
  - Select to **Include deleted subjects**

**Note!** On the selection page, in the **Events** view, the event name (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:



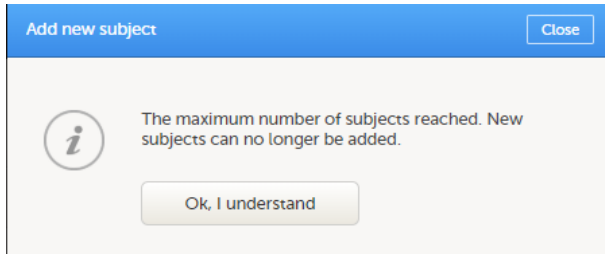
The first form in the study is displayed.

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

**Note!** Only user roles with editing permissions for the study start event 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.





Entering and editing data

# Entering/Editing data

Published by Viedoc System 2024-03-19

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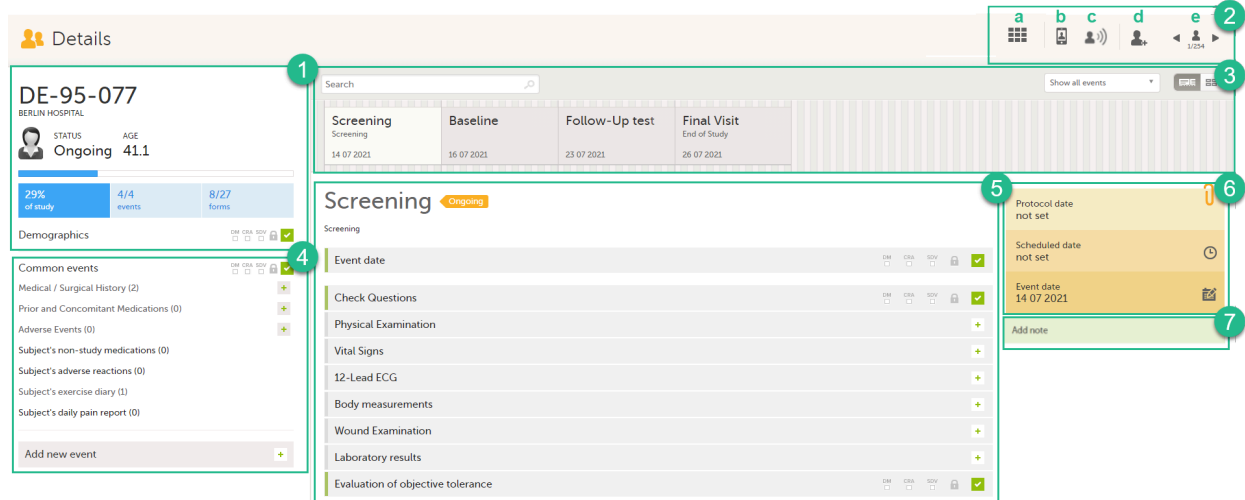
## [11. Blacklisted file formats](#)

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## 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.



Here you will find the following information:

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

**Note!** 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:



Flag	Description
<b>DM</b>	Shows if the data was reviewed by the Data Manager ( <a href="#">DM</a> ) or other role with review permission. Green check-mark if performed, otherwise grey.
<b>CRA</b>	Clinical review indicator, reviewed by Clinical Research Associate ( <a href="#">CRA</a> ) or other role with review permission. Green check-mark if performed, otherwise grey.
<b>SDV</b>	Source Data Verification ( <a href="#">SDV</a> ) indicator. Green check-mark if performed, otherwise grey.
<b>Lock</b>	Black if the form was locked by the Monitor, otherwise grey.
<b>Status</b>	Shows the status of the data entered: <ul style="list-style-type: none"> <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 [Signing data](#)):



- Data review console, for user roles with data review permissions (for details, see [Clinical review, SDV and Lock](#) and [Data review and Lock](#)):



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. **Tip!** 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 [Initiating an event](#).

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

7. Private notes. For details, see [Adding private notes](#).

## 1.2 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:



1. Subject ID. You can use this dropdown list to navigate to other subjects within the same form, see [Navigating 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 [Navigating 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 [Confirm data as missing](#) and [Adding private 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:

- [Scheduled events](#) - 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 **visible** 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 **not visible**. 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

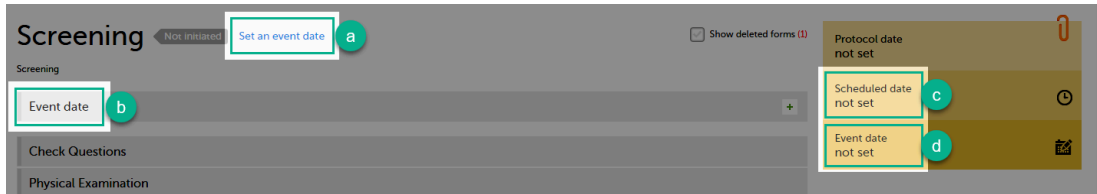
queries on the event date. The Event date form is neither included in metrics but still available in the data export.

## 2.1 Scheduled event

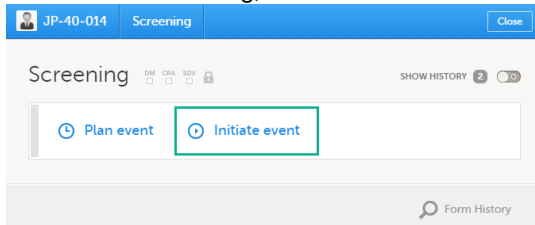
To initiate a scheduled event:

- 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**.



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



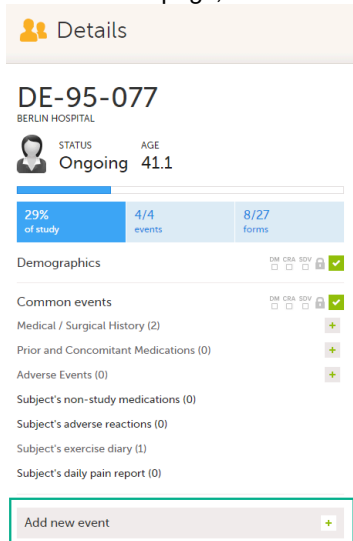
**Note!** For the events that are already scheduled, the protocol date is also displayed. Entering an event date that is outside the protocol date will raise a warning message.

- 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.



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:

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

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:

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

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](#)

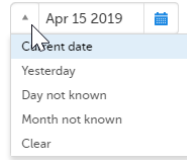
- [Times](#)
- [Ranges](#)
- [File upload](#)
- [Linking between forms](#)

### 3.1 Dates

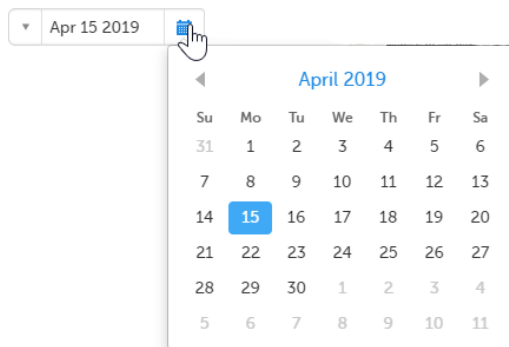
You can fill in the date field in two ways:

- Click the dropdown menu and select one of the following options:

- **Current date**
- **Yesterday**
- **Day not known**
- **Month not known**
- **Clear** (remove date)



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

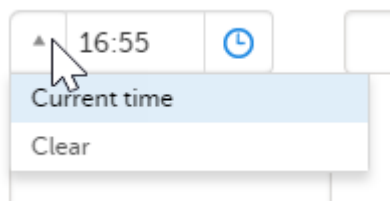


**Tip!** You can click the month/year header to view all months of the year, and then click the year header to view a range of years.

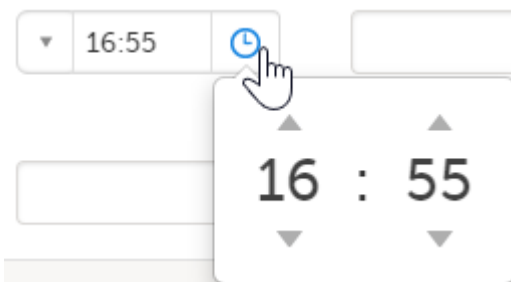
### 3.2 Times

You can fill in the time field in two ways:

- Click the dropdown menu to select the current time:



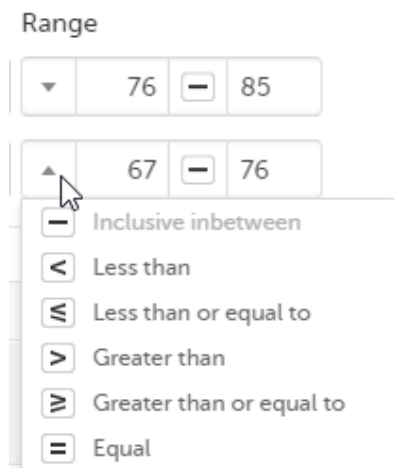
- Click the clock icon to open the time picker. Click the arrows to select the hour and minute (with a five minutes time interval), or double-click the hour and minute fields to manually enter any hour and minute:



### 3.3 Range

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

- Inclusive in between
- < Less than
- ≤ Less than or equal to
- > Greater than
- ≥ Greater than or equal to
- = Equal to



### 3.4 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.
- 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 [Blacklisted file formats](#).

### 3.5 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:

**Details**

**001-001**  
UPPSALA

**DEMO** Date of informed consent **16 Dec 2021** Age **61**

100% of study | 1/1 events | 10/10 forms

Demographics  DM  CRA  SOV   Lock  Green checkmark

**Common events**  DM  CRA  SOV   Lock  Green checkmark

Medical History (2)

Adverse Events (2)

Prior and Concomitant Medications (4)

Add new event

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.

**DEMO** 001-001 | Common events | Close

Show deleted events (7)  Show review status

Medical History 2 events. [Add new](#)

2 - Back pain - 16 Dec 2021  DM  CRA  SOV   Lock  Green checkmark

5 - Back pain - 16 Dec 2021  DM  CRA  SOV   Lock  Green checkmark

Adverse Events 2 events. [Add new](#)

Prior and Concomitant Medications 5 events. [Add new](#)

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

Select **Add new** in the Prior and Concomitant Medications form.

DEMO 001-001 Common events Close

Show deleted events (5)  Show review status

Medical History 2 events. [Add new](#)

Adverse Events 2 events. [Add new](#)

Prior and Concomitant Medications 4 events. [Add new](#)

3 - Paracetamol - 16 Dec 2021	DM <input type="checkbox"/>	CRA <input type="checkbox"/>	SDV <input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4 - Alvedon - 16 Dec 2021	DM <input type="checkbox"/>	CRA <input type="checkbox"/>	SDV <input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

4 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.

**Note!** 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.


- 4 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.

**Note!** 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.

### 3.5.1 Updates to linked forms



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.

### 3.5.2 Locations of updated linked forms

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

ID	REFERENCE	ISSUE DETAIL	CONFIRMATION	STATE
001-001 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.



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

Selection · Events

Search FOUND 6 CARDS Show event types Show all sites Sort by added date

ID #	Medical H...	Adverse E...	Prior and ...
001-003			
002-003			
002-002	✓	✓	i
002-001	✓		✓
001-002	✓	✓	i
001-001	✓	✓	i

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

Details

## 002-002

STOCKHOLM

Date of informed consent 16 Dec 2021 Age 53

11% of study 1/2 events 2/18 forms

Demographics DM CRA SDV ✓

**i** 1 form with issue(s)

**Common events** DM CRA SDV i

- Medical History (1) +
- Adverse Events (1) +
- Prior and Concomitant Medications (3) +

Add new event +

### 3.5.3 Updating a linked form

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

Details

## 002-002

STOCKHOLM

Date of informed consent 16 Dec 2021 Age 53

11% of study 1/2 events 2/18 forms

Demographics DM CRA SDV ✓

**i** 1 form with issue(s)

**Common events** DM CRA SDV i

- Medical History (1) +
- Adverse Events (1) +
- Prior and Concomitant Medications (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:

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

### 3.6 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 initiated events as well. This function is available through the dropdown lists in the form header, as illustrated below:

- Navigate through subjects:

The screenshot shows a medical form for subject NL-UMG-002, Visit 1 [21 Sep 2018]. A dropdown menu is open, displaying a list of subjects: SE-AHU-060, SE-AHU-061, SE-AHU-062 (highlighted with a green box and a mouse cursor), SE-AHU-063, and SE-AHU-064. The background form contains a text field with the placeholder text "could be recorded in the Medical / Surgery history log" and an "Add note" button at the bottom right.

- Navigate through events:

The screenshot shows a medical form for subject NL-UMG-002, Visit 1 [21 Sep 2018]. A dropdown menu is open, displaying a list of events: "Add subject [21 Sep 2018]", "Visit 2 [28 Sep 2018]" (highlighted with a green box and a mouse cursor), and "Visit 3". The background form is titled "Vital Signs" and includes a question "Were Vital Signs measured?" with "Yes" and "No" radio buttons. Below this is a text field with the placeholder text "Clinically significant findings should be recorded in the Medical / Surgery history log" and an "Add note" button at the bottom right.

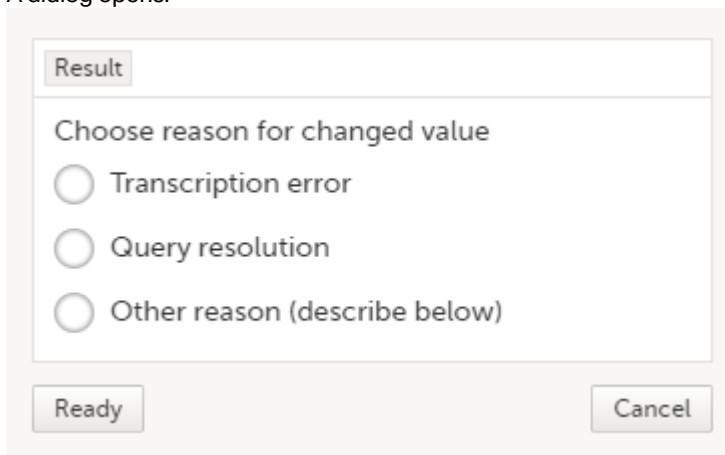
## 4 Editing data

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.

The screenshot shows a medical form for subject SE-AHU-024, Visit 1 [01 Nov 2017] in edit mode. The form is titled "Vital Signs" and includes a "SHOW HISTORY" button. The data displayed is: Blood pressure (Systolic: 120 mmHg, Diastolic: 60 mmHg) and Pulse (Rate: 68 bpm). Below this is a question "Were Vital Signs measured?" with "Yes" and "No" radio buttons, and a "Date and time" field set to "01 Nov 2017 00:00". At the bottom, there is a text field with the placeholder text "Clinically significant findings should be recorded in the Medical / Surgery history log". The "Edit" button is highlighted in the top right corner, and an "Edit form" tooltip is visible. The footer contains the text: "Elise Langenkamp | Viedoc™ 4.38.6533.25159 | 2017-11-20T15:55 CET 1 | 33.0 | A demo study | Academic Hospital Uppsala".

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



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

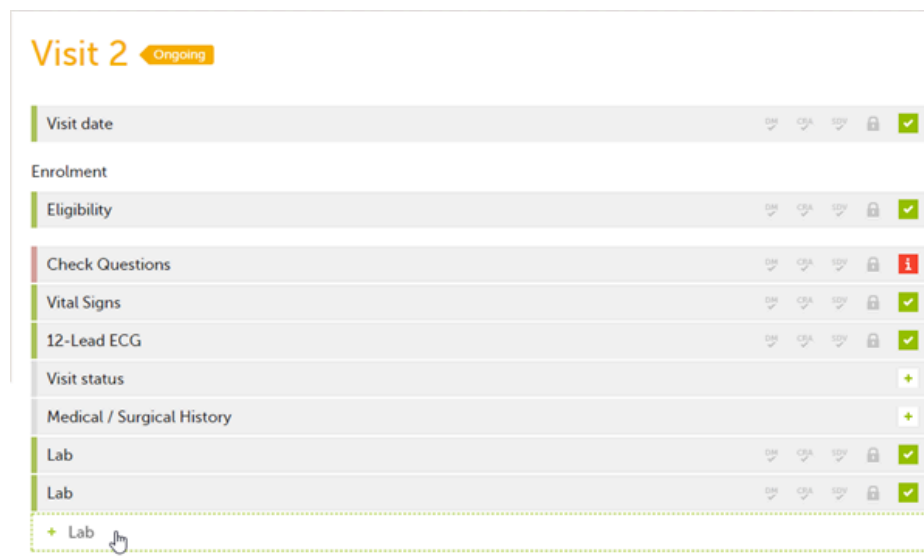
#### Note!

- 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 subject-submitted 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).



**Note!** The ghost form of a repeating form is displayed below the main form and marked with a + icon. If you see a ghost form above the main form, it is a copyable form. See the image below, and see [Copyable forms](#).

Visit 2 Ongoing

Visit date DM CRA SDV 🔒 !

Pre-dose

Check Questions	DM	CRA	SDV	🔒	✓
Vital Signs	DM	CRA	SDV	🔒	✓
12-Lead ECG	DM	CRA	SDV	🔒	✓
Visit status	DM	CRA	SDV	🔒	✓
Lab					+

Post-dose

Lab					+
Safety Laboratory Parameters					+
4 <span>📄</span> Test form that is copyable					
3 Test form that is copyable					+
1 Test form that is repeatable	DM	CRA	SDV	🔒	✓
2 + Test form that is repeatable					

1. Main form instance of repeating form
2. Ghost form of a repeating form, displayed below the main form instance and marked with a + icon
3. Main form instance of a copyable form
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.

## 6 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.

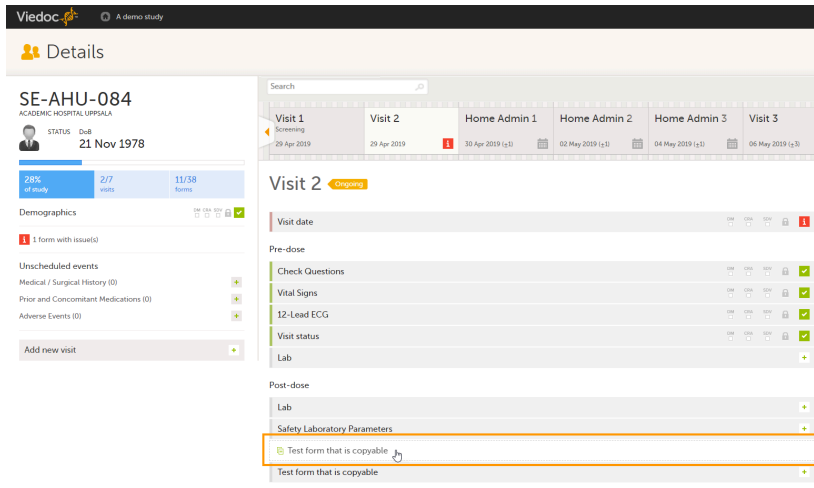
**Note!** The ghost form of a copyable form is displayed above the main form, and marked with a copy icon. If you see a ghost form below the main form, it is a repeating form. See the image below, and see [Repeating forms](#).

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

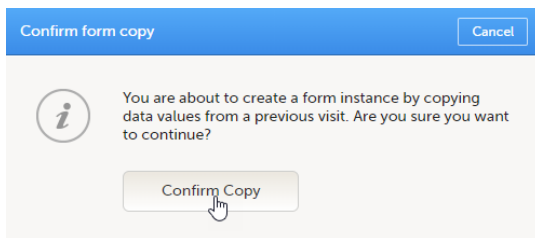
If the copyable form is also set as repeating (see [Repeating forms](#)), and in the previous event, three instances of that form have been initiated, then in the current event all three instances appear as ghost form. By clicking one of these ghost forms, you can select the instance from which the data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

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

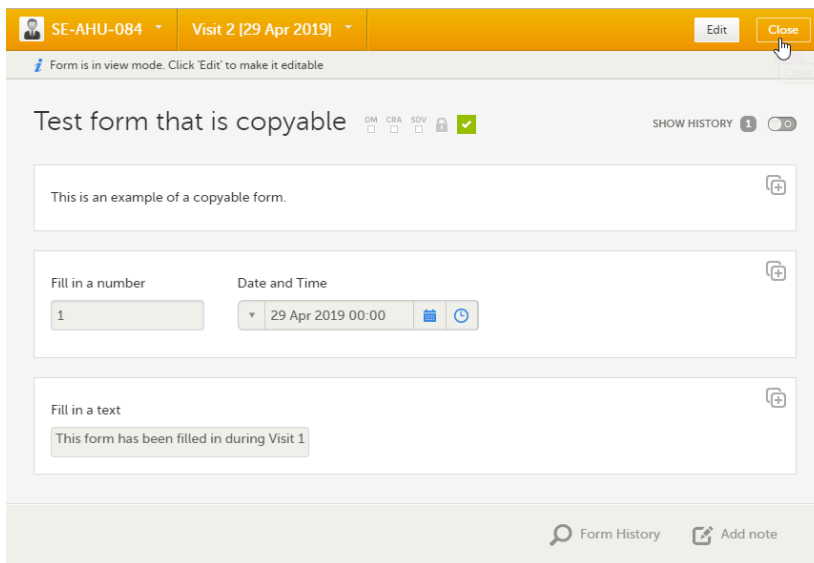
1 Click the ghost form.



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



2 Click **Confirm** to continue.  
An instance of the form opens, pre-filled with data from the previous event.



- 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).

## 7 Confirming data as missing

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

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

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.  
**Note!** The **Confirm field is missing** action is only shown for the fields that are set as "Required" in the study design.
- 4 Click **Ready**. Below the field, the text **Confirmed as missing** is displayed, together with the reason provided above.

## 8 Adding private notes

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:

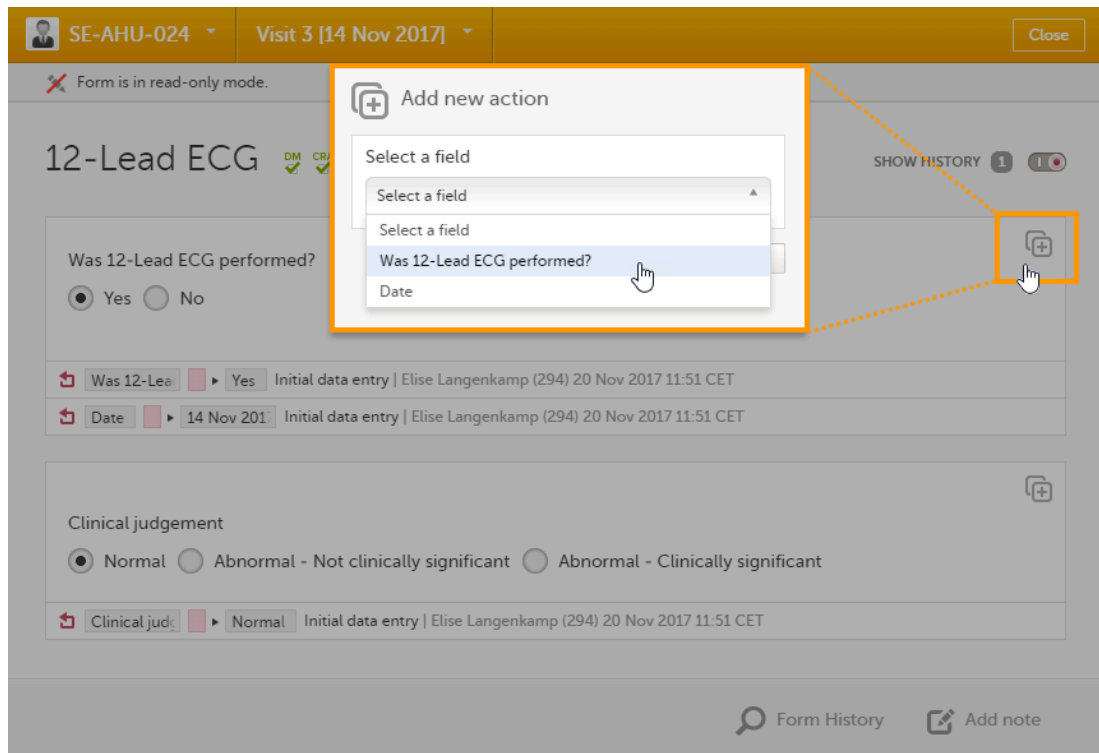
- 1 Click **Add note** on the bottom of the form.
- 2 Enter the note text and click **Save note**. The note dialog closes and the note is displayed on the form.

## 8.3 Private notes for fields

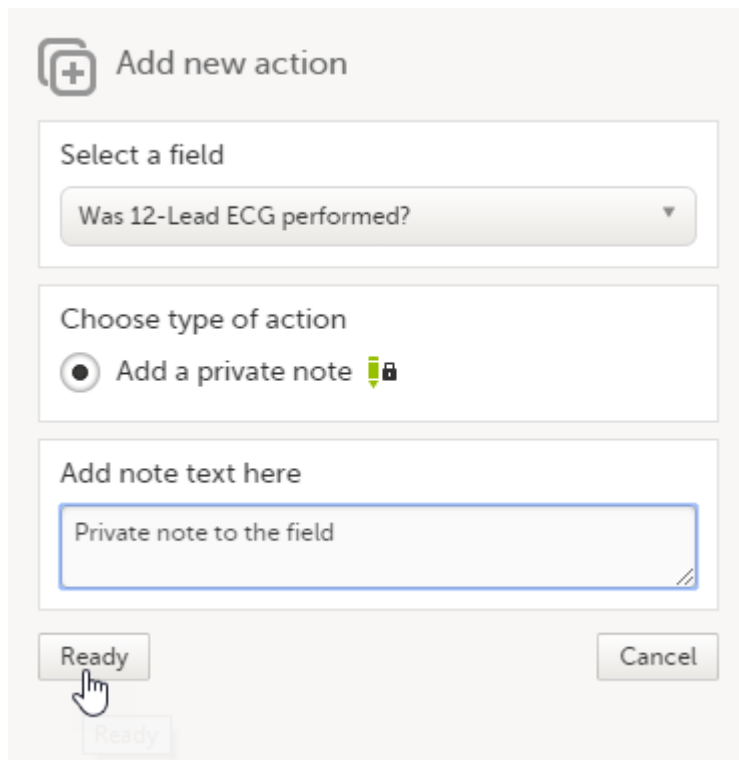
You can add private notes to single fields in a form. Private notes are only visible to the user that created the notes, and can only be edited by that user. Adding or editing a private note does not break the signature.

To add a private note for an event:

- 1 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.



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



3

Click **Save changes**.

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

DM CRA SDV [lock] [check]

SHOW HISTORY 1 [toggle]

Was 12-Lead ECG performed? Date

Yes  No 14 Nov 2017 00:00

Was 12-Lead ECG performed? Private note to the field

Field	Value	Initial data entry
Was 12-Lead ECG performed?	Yes	Elise Langenkamp (294) 20 Nov 2017 11:51 CET
Date	14 Nov 2017	Elise Langenkamp (294) 20 Nov 2017 11:51 CET

Clinical judgement

Normal  Abnormal - Not clinically significant  Abnormal - Clinically significant

Field	Value	Initial data entry
Clinical jud:	Normal	Elise Langenkamp (294) 20 Nov 2017 11:51 CET

Form History 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 [Issues: Resolve a query](#)
- 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

Form is in read-only mode.

### 12-Lead ECG

DM CRA SDV [lock] [check]

SHOW HISTORY 1 [toggle]

Was 12-Lead ECG performed? Date

Yes  No 14 Nov 2017 00:00

Was 12-Lead ECG performed? Private note to the field

Field	Value	Initial data entry
Was 12-Lead ECG performed?	Yes	Elise Langenkamp (294) 20 Nov 2017 11:51 CET
Date	14 Nov 2017	Elise Langenkamp (294) 20 Nov 2017 11:51 CET

Clinical judgement

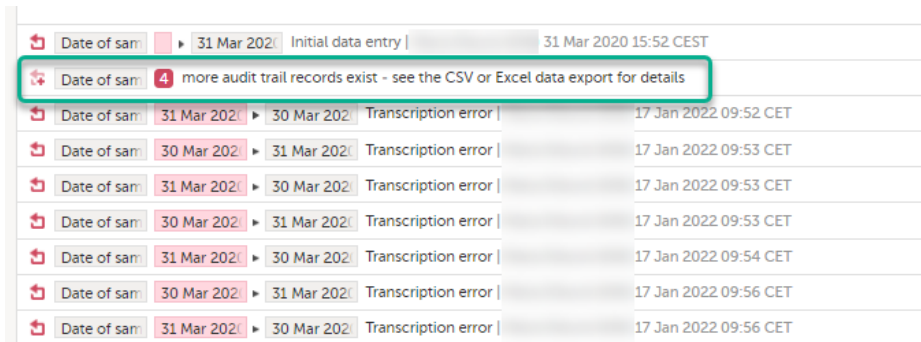
Normal  Abnormal - Not clinically significant  Abnormal - Clinically significant

Field	Value	Initial data entry
Clinical jud:	Normal	Elise Langenkamp (294) 20 Nov 2017 11:51 CET

Form History 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:



The screenshot shows a table with columns for 'Date of sam', 'Initial data entry', and a timestamp. A red box highlights a message: '4 more audit trail records exist - see the CSV or Excel data export for details'. Below the message, several rows are visible, each with a 'Date of sam' (e.g., 31 Mar 2021, 30 Mar 2021), a 'Transcription error' message, and a timestamp (e.g., 17 Jan 2022 09:52 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 [link](#).

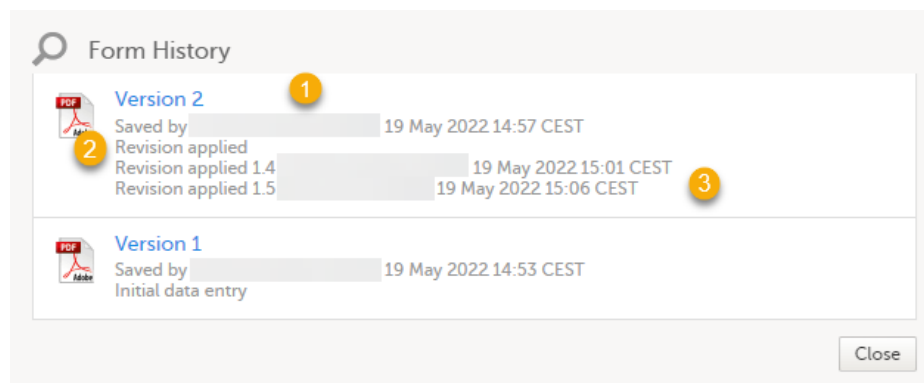
**Note!** It is not very likely that clinic staff would make more than 25 edits to a field. However, when working with JavaScript functions, that is a possibility.

## 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 [eCRF](#).



The screenshot shows a 'Form History' dialog box with a search icon and the title 'Form History'. It lists two versions of the form:

- Version 2** (marked with a yellow circle 1):
  - Saved by [redacted] 19 May 2022 14:57 CEST
  - Revision applied (marked with a yellow circle 2)
  - Revision applied 1.4 [redacted] 19 May 2022 15:01 CEST
  - Revision applied 1.5 [redacted] 19 May 2022 15:06 CEST (marked with a yellow circle 3)
- Version 1**:
  - Saved by [redacted] 19 May 2022 14:53 CEST
  - Initial data entry

A 'Close' button is located at the bottom right of the dialog box.

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:

The screenshot shows a Viedoc form titled "12-Lead ECG". The header bar is orange and contains a subject ID icon (1), the text "SE-AHU-071" (2), and "Visit 2 [29 Mar 2018]" (3). The form body has a light blue background. It contains two main sections: "Was 12-Lead ECG performed?" with radio buttons for "Yes" (selected) and "No" (4), and a date field set to "29 Mar 2018 00:00" (5). Below this is a "Clinical judgement" section with radio buttons for "Normal" (selected), "Abnormal - Not clinically significant", and "Abnormal - Clinically significant". The footer area is light grey and contains technical information: "Technical Writer | Viedoc™ 4.45.6813.16847 | 2018-08-29T11:15 CEST" (6), "1 | 57.0 | A demo study | Academic Hospital Uppsala" (7), and "Page 1 of 1" (10). A decorative torn-paper graphic is visible below the footer.

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.

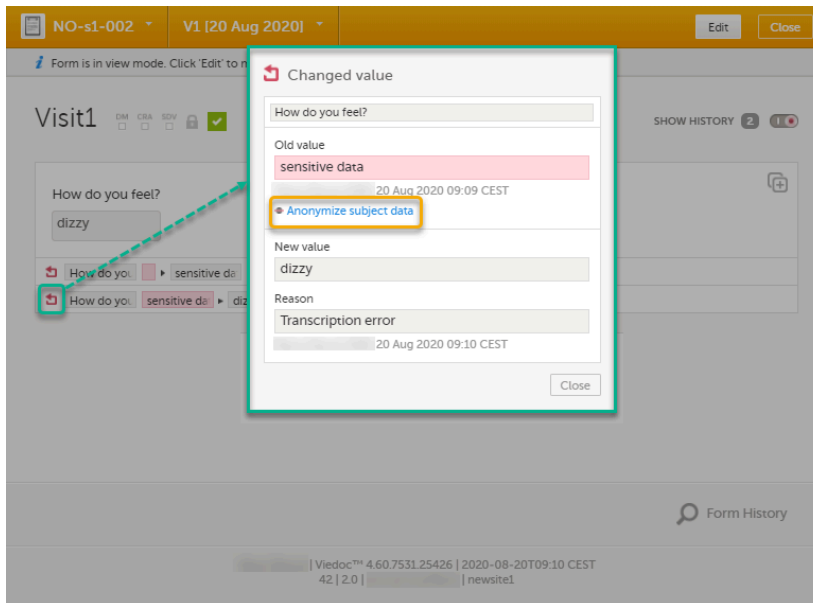
To mask sensitive data in the form history, your role must have the permission to anonymize data. The permission is set up in Viedoc Designer.

When sensitive data has been entered into a form, you first need to edit the data into something not sensitive, see [Editing data](#). Then a record in the form history is created.

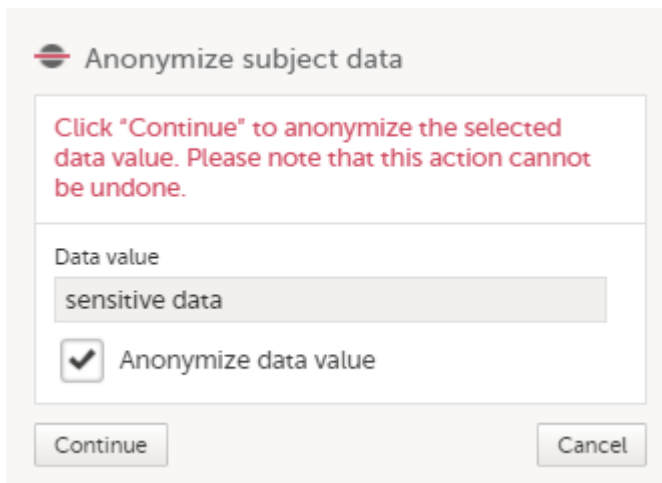
#### 10.3.1 Masking text

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.



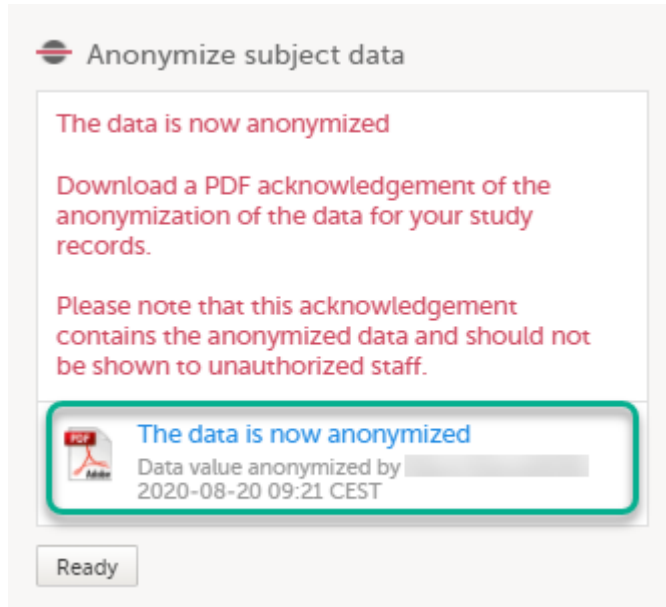
- 3 Click **Anonymize subject data**.
- 4 In the dialog that is displayed, select **Anonymize data value** and click **Continue**.



- 5 Enter your password and click **Confirm**.

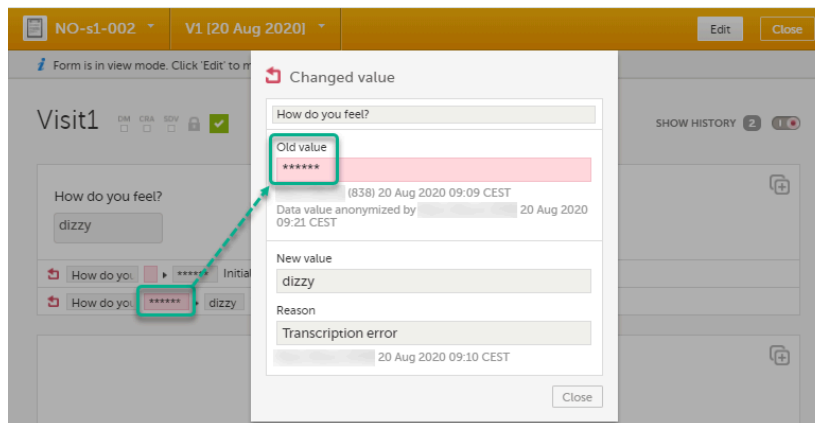
6 The dialog now displays a text confirming that the data is anonymized. Click **Ready**.

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



**Note!** 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.



**Note!** The masked data will be masked also in an export.

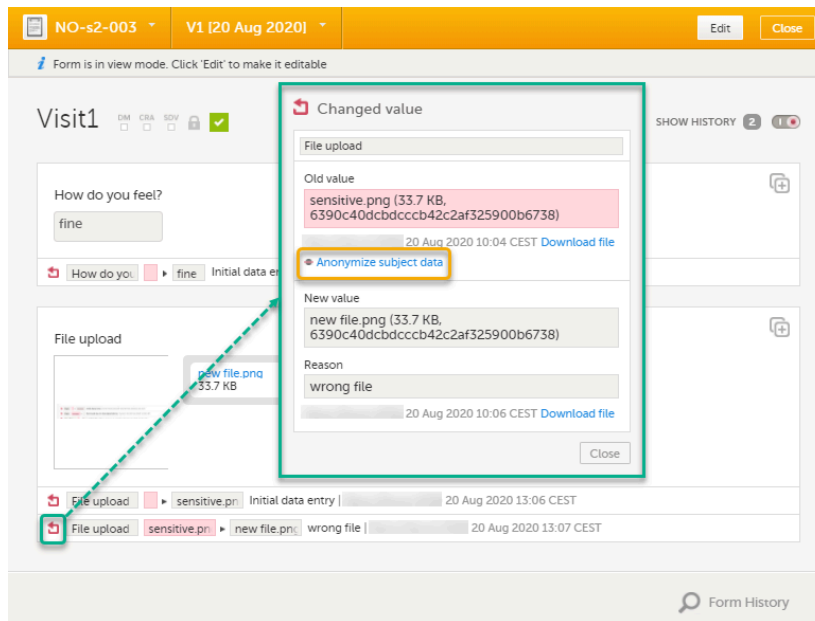
**Note!** Anonymization of data in linked forms does not affect the form link items, these have to be anonymized separately.

### 10.3.2 Masking a filename

To mask a sensitive filename in the form history:

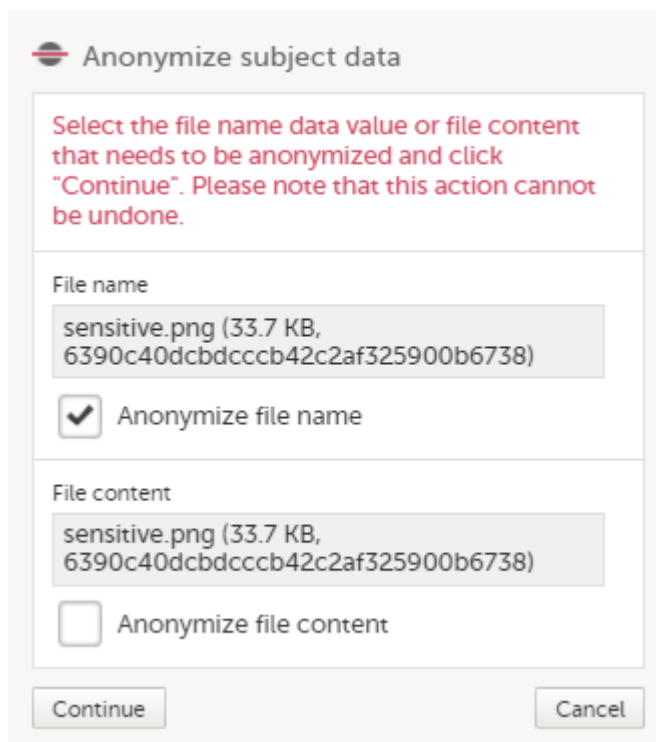
1 Click **Show history** in the top right corner of the form to open the form history.

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



3 Click **Anonymize subject data**.

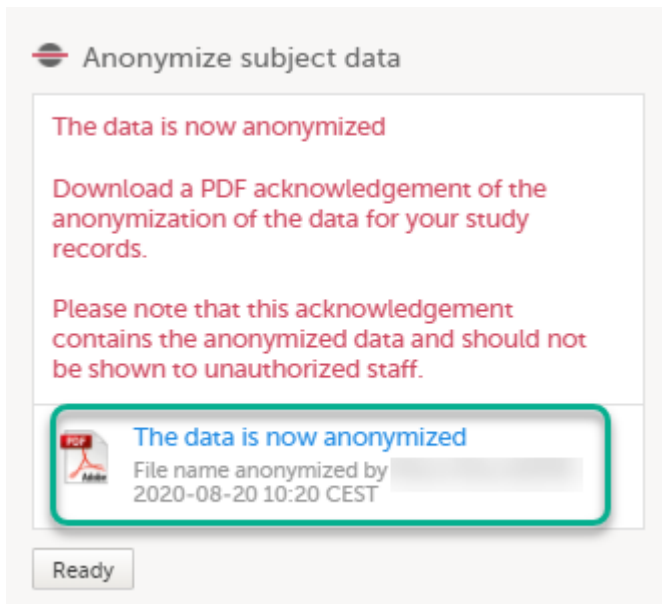
4 In the dialog that is displayed, select **Anonymize file name** and click **Continue**.



5 Enter your password and click **Confirm**.

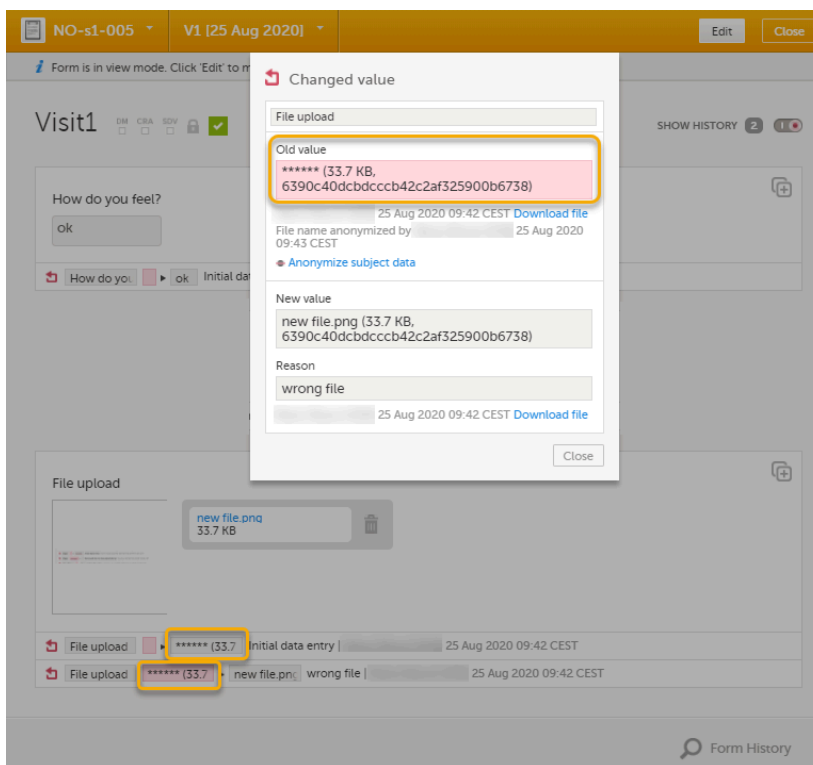


- 6 The dialog now displays a text confirming that the filename is anonymized. Click **Ready**.



**Note!** 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.

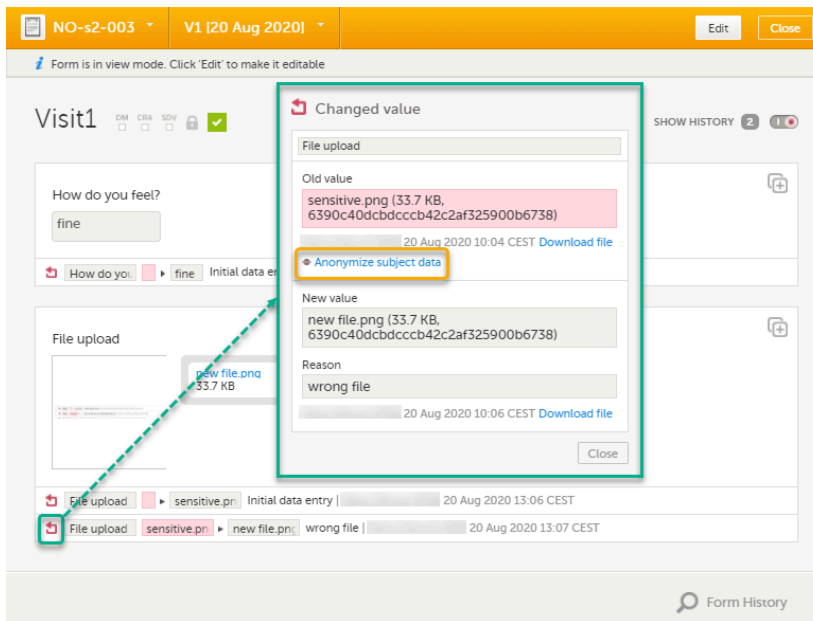
- 7 The masked filename is now no longer visible in the form history.



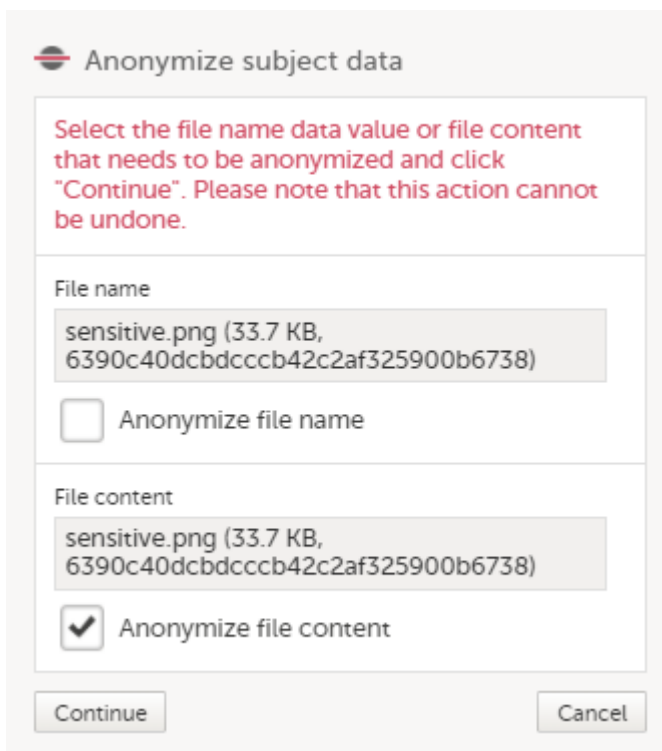
### 10.3.3 Masking file content

- 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 file content, click the **Changed value** icon.

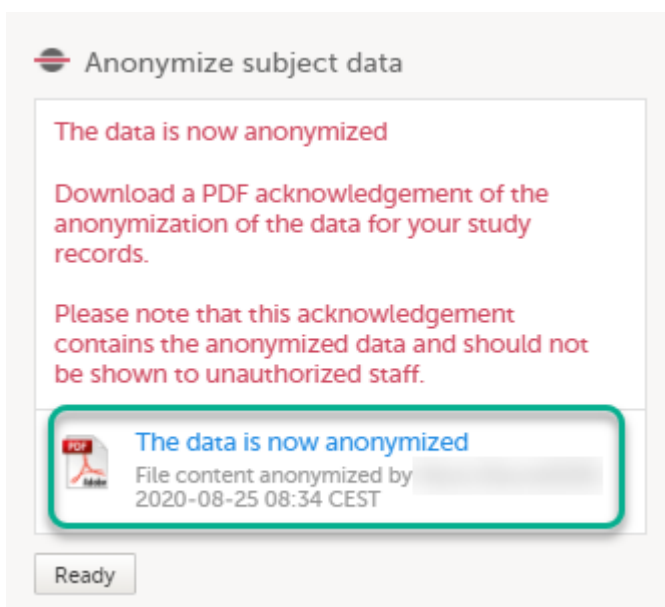


- 3 Click **Anonymize subject data**.
- 4 In the dialog that is displayed, select **Anonymize file content** and click **Continue**.



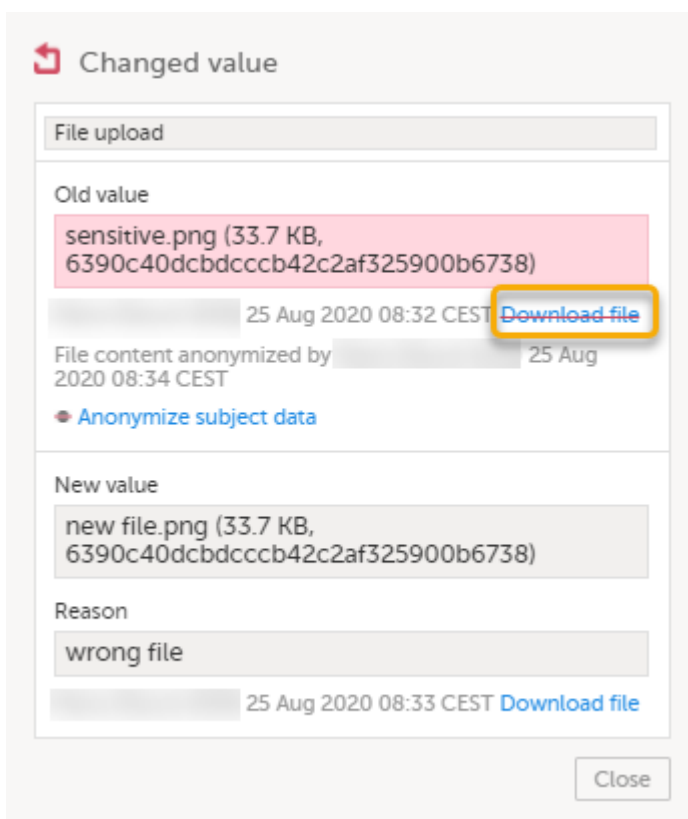
- 5 Enter your password and click **Confirm**.

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



**Note!** 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.



## 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.

Latest exports

2012-09-12 22:50 [In queue]	Viedoc 4.51, 31 subjects, 1 row per activity, [45KB]
2012-09-11 15:27 [Ready]	Viedoc 4.51, 31 subjects [45KB]
2012-09-11 15:27 [Ready]	Viedoc 4.51, 31 subjects [45KB]
2012-09-11 15:27 [No data]	Viedoc 4.51, 31 subjects [0KB]
2012-09-11-15-27	Removed due to data anonymization

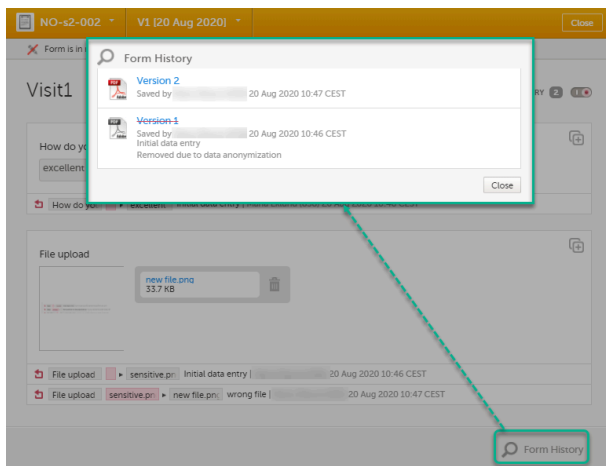
[View all exports](#)

## 10.4.2 Form PDFs

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



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.



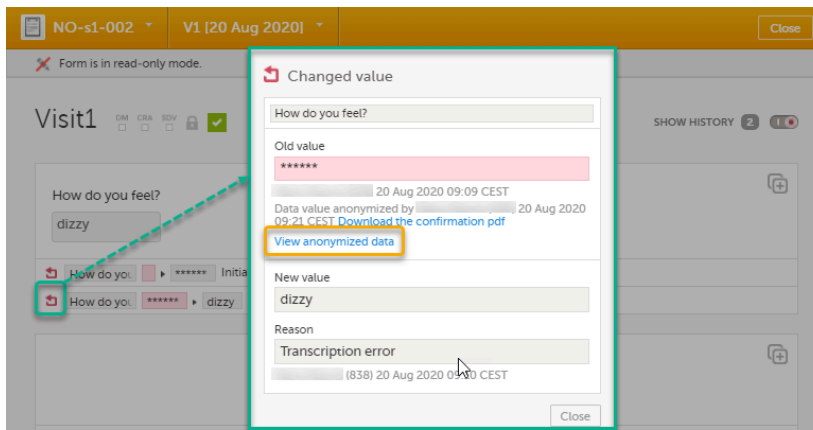
## 10.5 Viewing masked data

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:

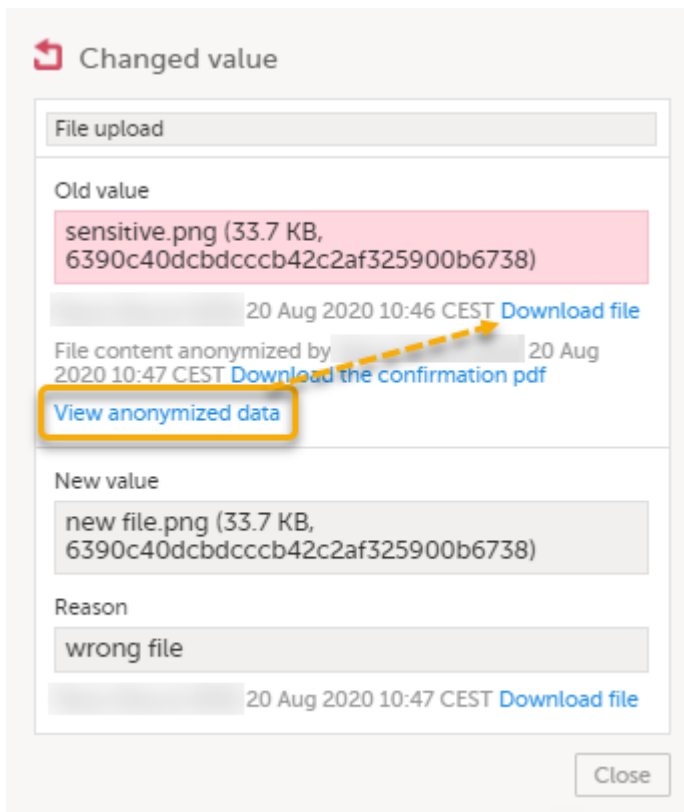
- 1 Click **Show history** in the top right corner of the form to open the form history.

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



**Note!** 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.



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

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

Extension	Format	Operating system(s)
<b>VBE</b>	VBScript Encoded Script	Windows
<b>VBS</b>	VBScript File	Windows
<b>VBSSCRIPT</b>	Visual Basic Script	Windows
<b>WORKFLOW</b>	Automator Workflow	Mac OS
<b>WS</b>	Windows Script	Windows
<b>WSF</b>	Windows Script	Windows
<b>WSH</b>	Windows Script Preference	Windows





Resetting and deleting data

# Resetting and deleting data

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## 1 Introduction

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

**Note!** 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.

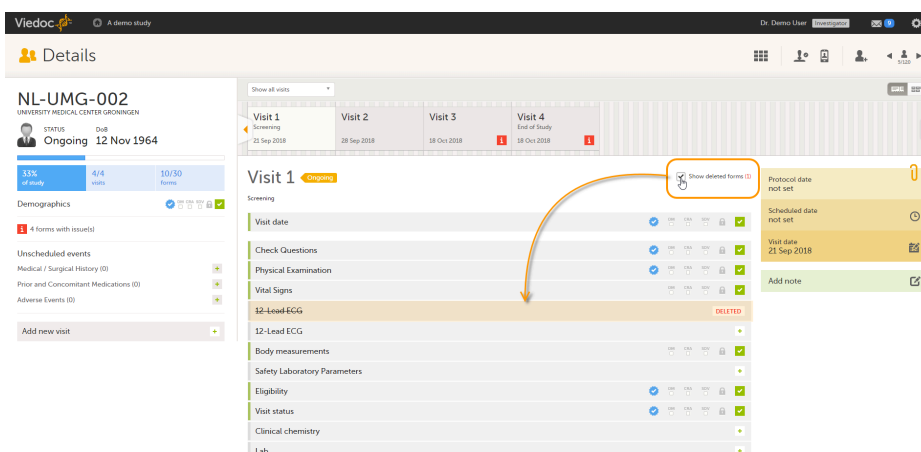
**Important!** Although no data is deleted from the database, it is not possible to revert any deleted data. Therefore, please make sure to double-check the data before you delete the data. If any data is deleted by mistake, the deleted data is still available for preview and can be re-entered manually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

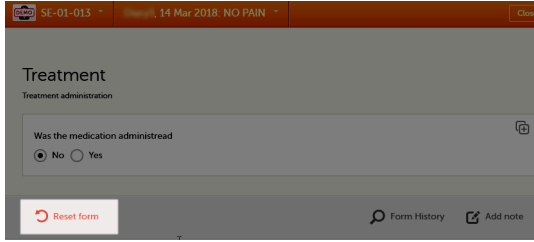
Resetting a form means that all data in the form is erased and the fields in the form appear empty again.

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:

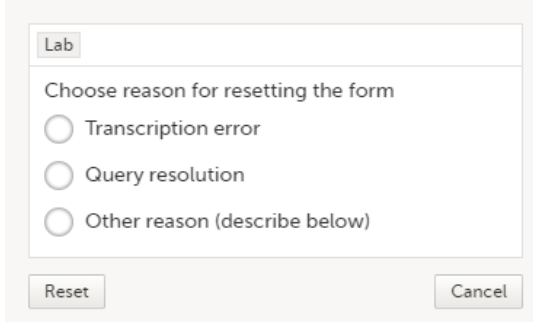


To reset a form:

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



- 2 Click **Reset form**. A pop-up appears asking for the reason for resetting the form.



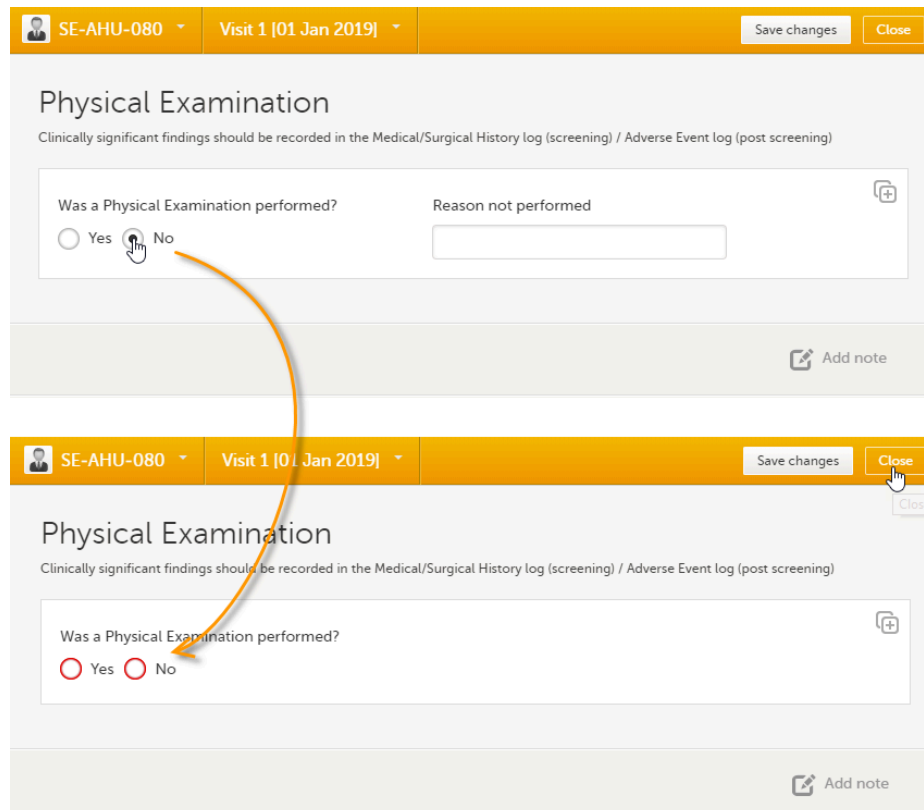
- 3 Enter the reason and click **Reset**.

### Note!

- 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:



## 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.

The screenshot shows the 'Adverse Event' form with the following fields and options:

- AE Id:** 1
- Description:** Pain
- Start Date:** 01 May 2018 00:00
- Ongoing?:** Yes (unselected), No (selected)
- End Date:** 02 May 2018 10:30
- Severity:** Mild (selected), Moderate (unselected), Severe (unselected)
- Serious?:** Yes (unselected), No (selected)
- Causality:** Probable
- Action Taken:** Dose reduced
- Outcome of Adverse Event:** Recovering

At the bottom left, there is a red trash icon with the text 'Delete event'. At the bottom right, there is a magnifying glass icon with the text 'Form History'.

- 2 Click **Delete event**.  
A pop-up appears asking for the reason for deleting the event.

The pop-up dialog box is titled 'Adverse Event' and contains the following text and options:

Choose reason for deleting the event

- Transcription error
- Query resolution
- Other reason (describe below)

At the bottom of the dialog, there are two buttons: 'Delete' and 'Cancel'.

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

### Note!

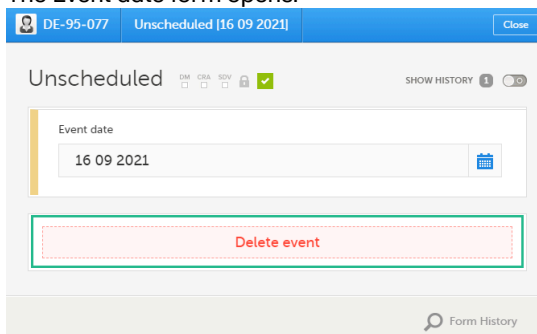
- Any open queries in a deleted event will automatically be closed by the system.
- If you cannot see the delete icon after clicking **Edit**, please contact your Site Manager or Study Manager for assistance. It might be possible that your role does not include permission to delete events.

## 4 Deleting an unscheduled event

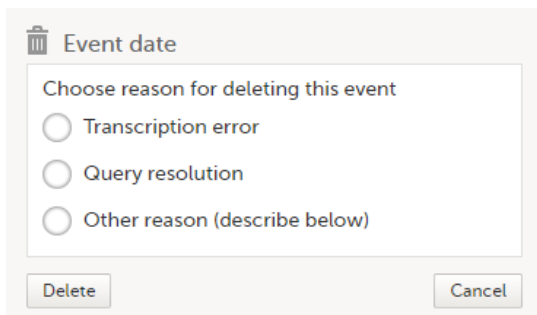
If you have added an event manually using the **Add new event** button (see [Entering/Editing data](#)), you can remove the manually added event if it does not contain any data. If any form within a manually added event is completed, the form needs to be reset before the event can be deleted.

To delete a manually added event:

- 1 Open the event and click **Event date**.  
The Event date form opens.

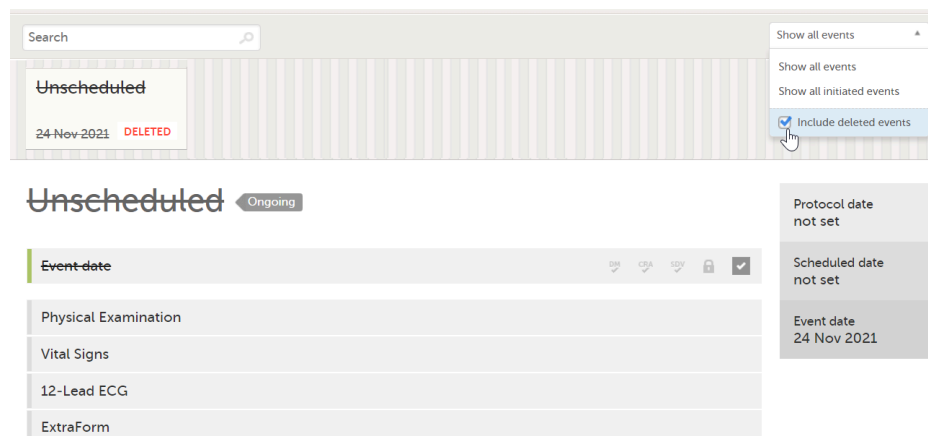


- 2 Click **Delete event**.  
A pop-up appears asking for the reason for deleting the event.



- 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:



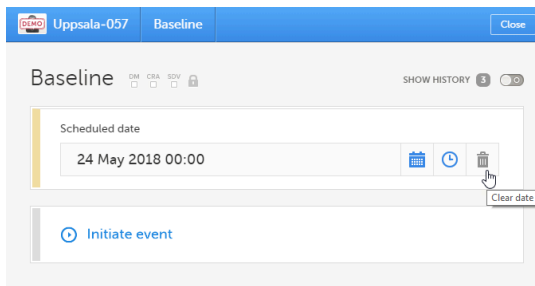
## 5 Resetting the event status

If you have initiated or planned a scheduled 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.

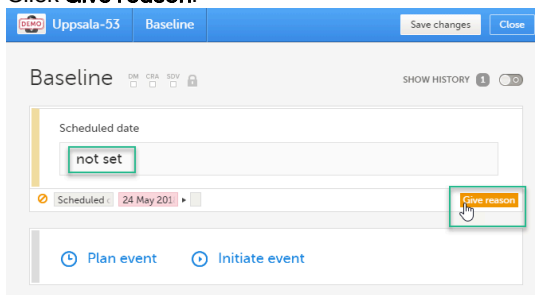
**Note!** If a scheduled event with visibility conditions is reset and the conditions were not fulfilled, the event status is set as "Deleted".

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

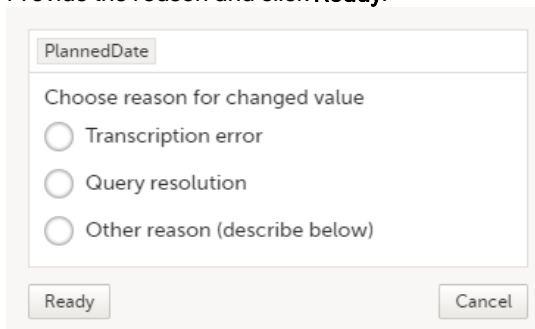
- 1 Open the event and click **Event date**.  
The Event date form opens.
- 2 Click the trash can icon next to the date.



- 3 The date is now **not set**.  
Click **Give reason**.



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

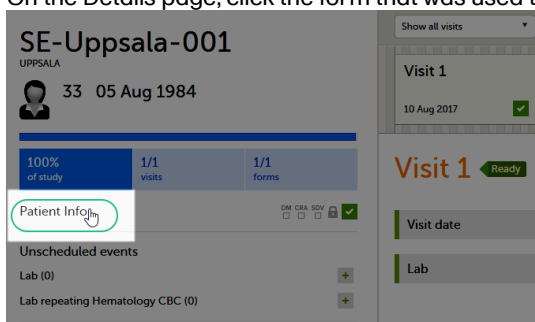


## 6 Deleting a subject

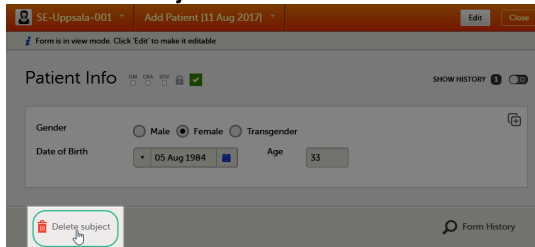
**Note!** A subject cannot be deleted if the form that was used to add the subject is locked.

To remove a subject from the study:

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

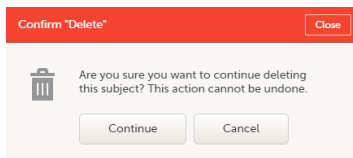


2 Click **Delete subject**.



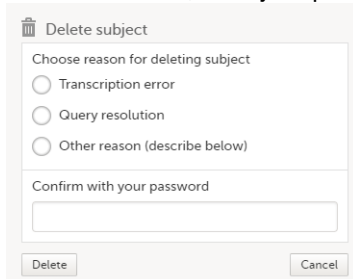
A confirmation dialog appears.

3 Click **Continue**.

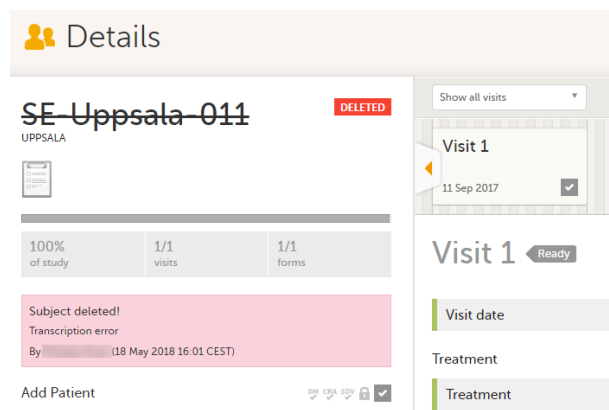


You will be prompted to enter the reason for deletion.

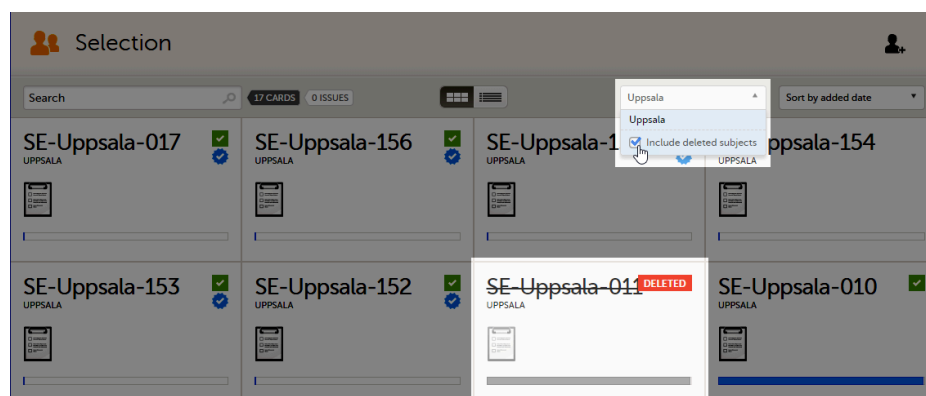
4 Provide a reason, enter your password and click **Delete**.



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



The subject card is also still visible on the [Selection page](#). 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.





Signing data

# Signing data

Published by Viedoc System 2023-10-10

## [1. Introduction](#)

### [1.1 Signature definition](#)

## [2. Signing console](#)

## 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.

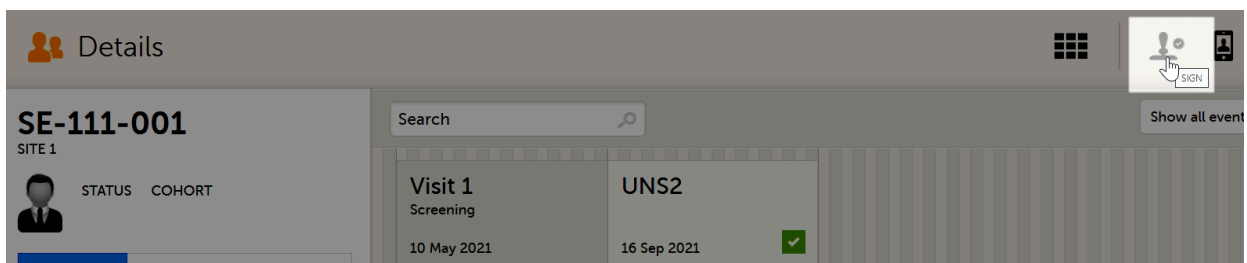
### 1.1 Signature definition

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:



The signing console opens:

DEMO 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 <input type="checkbox"/>	CRA <input type="checkbox"/>	SDV <input type="checkbox"/>				
SF36 Questionnaires	DM <input type="checkbox"/>	CRA <input type="checkbox"/>	SDV <input type="checkbox"/>				

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](#))

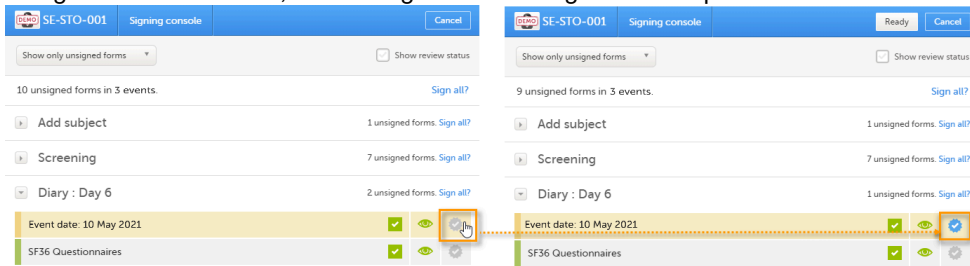
...for each form, check the **Show review status** checkbox in the top right corner of the page.

To sign the data:

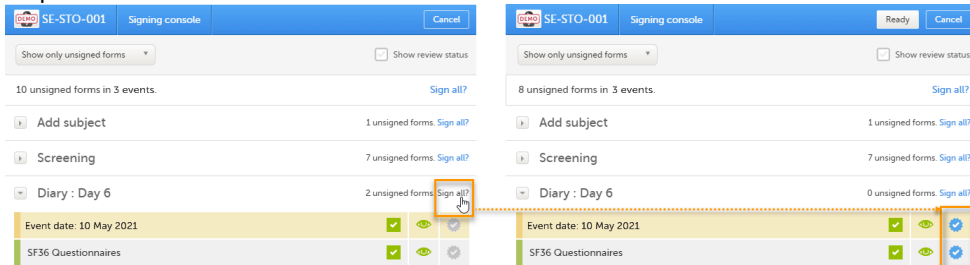


1 Mark the form(s) to be signed in one of the following ways:

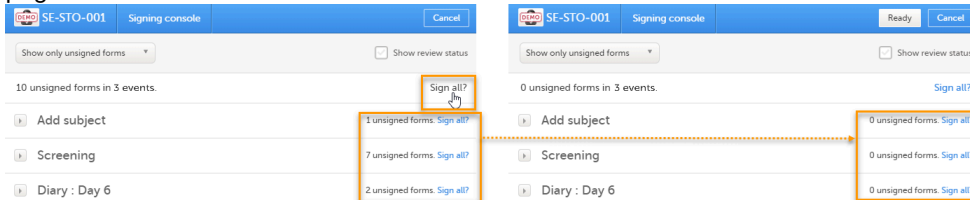
- To sign one form at a time, click the sign icon to the right of the respective form:



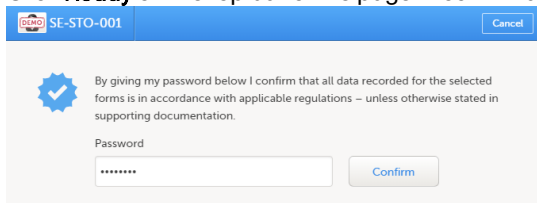
- To sign all unsigned forms within an event, click the **Sign all?** link to the right of the respective event:



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



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



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](#).



Working with reference data

# Working with reference data

Published by Viedoc System 2021-11-24

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# 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 Reference data overview

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

**Note!** 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.

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

Reference data

All sites Sweden Finland United Kingdom Germany

Central Lab, Lab references

Reference values Published Jun 19 2018 12:12 UTC by Technical Writer

Linked to 6 site(s). Linked to 0 form(s). Settings can be edited by 1 user(s). Last saved Jun 19 2018 12:12 UTC by Technical Writer

Open reference data editor

Local Lab, Lab references

Reference values Published Jun 19 2018 12:16 UTC by Technical Writer

Linked to 1 site(s). Linked to 1 form(s). Settings can be edited by 1 user(s). Last saved Jun 26 2018 09:12 UTC by Technical Writer

! Latest saved version is not published!

Open reference data editor

Showing 1-2 of 2 | Previous | Next

View per page | 10 | 20 | 50

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.

Reference variable name	Factors		Values to be populated	
	Sex	Age	Unit	Normal range
Hemoglobin	Male	N/A	g/dL	11.9 - 17.3
	Female	N/A	g/dL	12.1 - 15.3
Hematocrit	Male	≥ 18	%	39.1 - 50.2
		< 18	%	34.8 - 43.9
	Female	≥ 18	%	35.1 - 45.1
		< 18	%	33.4 - 41.3
Platelets	N/A	≥ 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 [Variables](#) 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.

**Note!** Only users with clinic roles that have permission to publish reference data can publish the reference data.

The screenshot illustrates the process of publishing reference data. At the top, the 'Local Lab, Lab references' header shows 'Linked to 1 site(s). Settings can be edited by 1 user(s)'. Below this is a table of reference variables. The 'Hematocrit' variable is highlighted, showing its configuration for 'Male' patients aged '>18'. The 'Publish' button is highlighted with an orange box. An arrow points from this button to a 'Publish' dialog box. The dialog box contains a message: 'Updated the hematoctrit normal range for male >18 from 0.37-0.48 to 0.39-0.50 according to reference lab data received from Karolinska, June 26, 2018.' The 'Publish' button in the dialog is also highlighted with an orange box. An arrow points from this button to the 'Messages' section of the landing page. The 'Messages' section shows a notification from 'Technical Writer' with the same message as the dialog box, which is highlighted with an orange box.

Reference variable name	Factors	Values to be populated		
	Sex	Age	Unit	Normal range
Hemoglobin	Male	N/A	g/L	133 - 170
	Female	N/A	g/L	127 - 155
Hematocrit	Male	>18		0.31 - 0.39

## 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 name	Factors		Values to be populated	
	Sex	Age	Unit	Normal range
Hemoglobin	Male	N/A	g/dL	10.9 - 17
	Female	N/A	g/dL	12 - 16.7
Hematocrit	Male	≥ 18	%	39 - 65.4
		< 18	%	34.8 - 43.9
	Female	≥ 18	%	32.5 - 39.1
		< 18	%	33.4 - 41.3
Platelets	Not included			

**Note!** 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

Central Lab, Lab references  
Linked to 6 site(s). Settings can be edited by 1 user(s).

#1 Valid from 2018-06-05 Valid to 2018-06-29

Reference variable name	Factors		Values to be populated	
	Sex	Age	Unit	Normal range
Hemoglobin	Male	N/A	g/dL	12.9 - 17.3
	Female	N/A	g/dL	12.1 - 15.3
Hematocrit	Male	≥ 18	%	39.1 - 50.2
		< 18	%	34.8 - 43.9
	Female	≥ 18	%	35.1 - 45.1
		< 18	%	33.4 - 41.3
Platelets	N/A		billion/L	150 - 450

3A: edit the current row

3B: add a new row

**Note!** 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 before *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.

Laboratory Results - Blood test

Link the scope with the reference data source that provided the test results

Lab references: Central Lab

Date and time of collection: 06 Aug 2018 00:00

Hemoglobin

Result: [ ] Unit: g/dL Normal range: 12 - 15 Clinical significance:  NCS  CS

Hematocrit

Result: [ ] Unit: % Normal range: 35 - 45 Clinical significance:  NCS  CS

Platelets

Result: [ ] Unit: [ ] Normal range: [ ] - [ ] Clinical significance:  NCS  CS

Because in the Reference Data editor the variable Platelets was set to Not included, no reference values are automatically populated here. These fields are editable so the reference values can be entered manually.

**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.

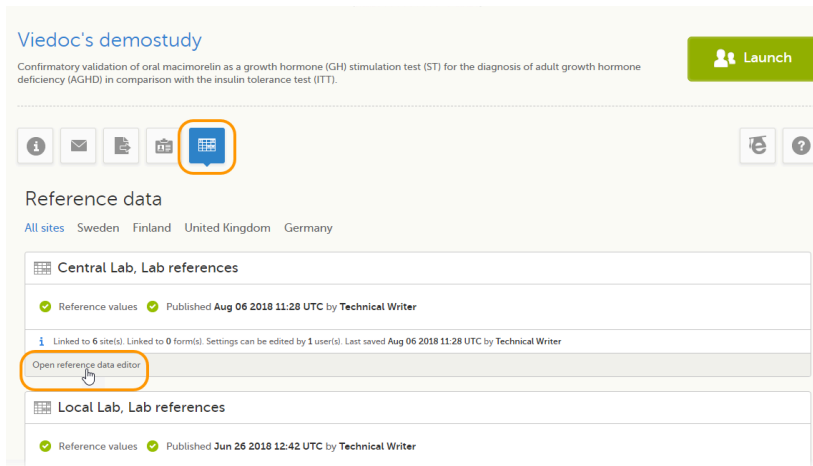
## 3 Entering and publishing reference data values

**Note!** You can only enter reference values when your role has permission to edit reference data.

To enter a new set of reference values:

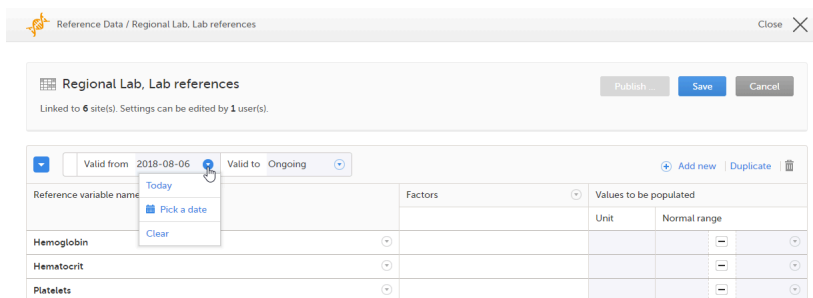
- 1 On the Viedoc landing page, click the **Reference data** icon.

- 2 Click **Open reference data editor** for the reference data source-scope combination you would like to enter values into.

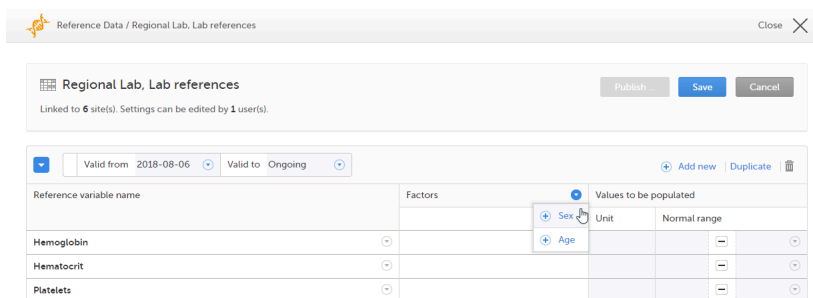


The reference data editor opens and displays the variables and the target types to be populated, as defined in the reference data scope. If you would like to exclude some of the variables, click the arrow to the right of the variable name and select **Not available**. See also [Variables](#) for more 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.



- 4 Click the arrow to the right of **Factors** and select the factors that should be included.





- 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.

Regional Lab, Lab references

Valid from 2018-08-06 Valid to Ongoing

Reference variable name	Factors		Values to be populated	
	Sex	Age	Unit	Normal range
Hemoglobin	N/A			
Hematocrit	N/A	N/A		
Platelets	N/A	N/A		

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.

Regional Lab, Lab references

#1 Valid from 2018-08-06 Valid to Ongoing

Reference variable name	Factors		Values to be populated	
	Sex	Age	Unit	Normal range
Hemoglobin	N/A	0 - 18		
Hematocrit	N/A	19		
Platelets	N/A			

See also [Factors](#) for more information.

- For every variable, and for every factor, enter the reference values that should be automatically populated to the forms.
- Click **Save** to save the reference data.

To publish reference data:

**Note!** You can only publish reference data when your role has permission to publish reference data.

- Click **Publish**.

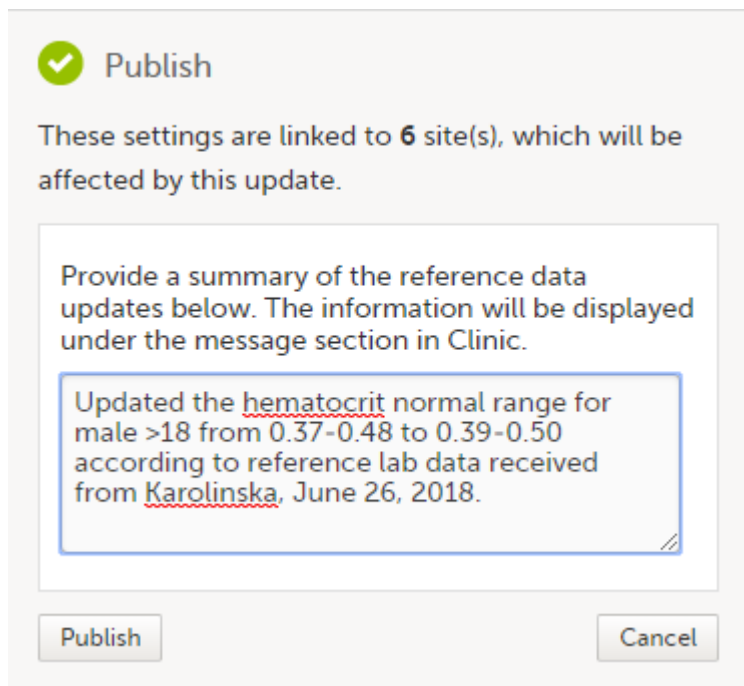
Regional Lab, Lab references

#1 Valid from 2018-08-06 Valid to Ongoing

Reference variable name	Factors		Values to be populated	
	Sex	Age	Unit	Normal range
Hemoglobin	N/A	0 - 18	g/dL	12.5 - 18
Hematocrit	Not included	19	g/dL	13.7 - 14.6
Platelets	Not included			

A dialog opens.

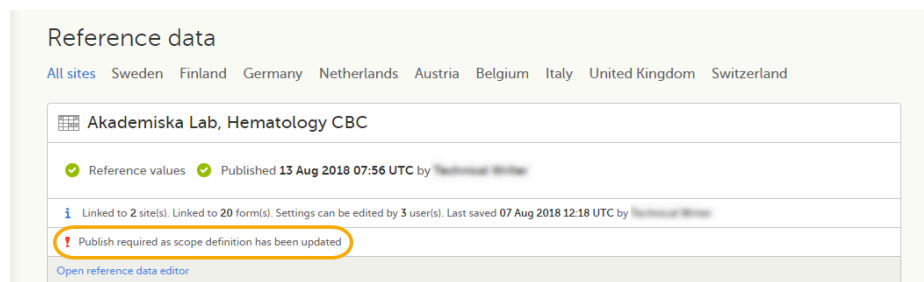
- 2 Enter a summary of the reference data updates in the field.



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 after the reference values have been published in Viedoc Clinic, the following message will appear on the Reference data page.



The reference data source-scope combination needs to be updated and published again 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 ].

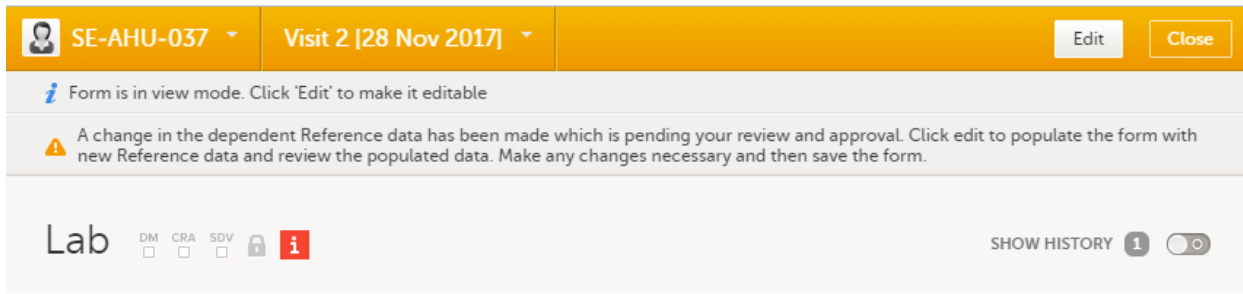
## 4 Editing reference data values

**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 [Variables](#)), factors (see [Factors](#)), 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 screenshot shows the top portion of a software interface. At the top, there is a yellow header bar with a user profile icon, the text 'SE-AHU-037', a dropdown arrow, 'Visit 2 [28 Nov 2017]', another dropdown arrow, an 'Edit' button, and a 'Close' button. Below this is a light gray bar with an information icon and the text 'Form is in view mode. Click 'Edit' to make it editable'. The next bar contains a warning icon and a message: 'A change in the dependent Reference data has been made which is pending your review and approval. Click edit to populate the form with new Reference data and review the populated data. Make any changes necessary and then save the form.' Below this is a white bar with the word 'Lab' on the left, followed by three checkboxes labeled 'DM', 'CRA', and 'SDV', a lock icon, and a red square icon with a white 'i'. On the right side of this bar, there is a 'SHOW HISTORY' label, a circular icon with the number '1', and a toggle switch.

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 [Selection page](#).



Randomization, allocation and emergency unblinding

# Randomization, allocation, and emergency unblinding

Published by Viedoc System 2023-06-21

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## 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:

The screenshot shows a web interface for a randomization form. At the top, there is a yellow header bar with a 'DEMO' icon, a dropdown menu showing 'SE-01-002', another dropdown menu showing 'Visit 1 [28 Jun 2019]', and two buttons: 'Randomize' and 'Close'. Below the header, the main content area is titled 'Randomization' and has a subtitle 'Randomize subject'. There is a large white input field containing the text 'Sex' and two radio buttons: 'Male' (unselected) and 'Female' (selected). A small icon with a plus sign is visible in the top right corner of the input field.

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:

The screenshot shows the same randomization form as above, but now it is in a read-only state. The yellow header bar is still present, but the 'Randomize' button is missing, and a 'Close' button is visible. Below the header, there is a red 'X' icon and the text 'Form is in read-only mode.'. The main content area is titled 'Randomization' and has a subtitle 'Randomize subject'. Above the input field, there are several status icons: 'DM', 'CRA', 'SDV', a lock icon, and a green checkmark icon. To the right of these icons is a 'SHOW HISTORY' button with a '1' and a toggle switch. The input field contains the text 'Sex' and two radio buttons: 'Male' (unselected) and 'Female' (selected). A small icon with a plus sign is visible in the top right corner of the input field.

## 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:

The screenshot shows a web interface for a randomization form. At the top, there is a header with 'SE-01-002' and 'Visit 1 [28 Jun 2019]'. Below the header, a message states 'Form is in read-only mode.' The main section is titled 'Randomization' and includes a 'Randomize subject' button. Below this, there is a form for 'Sex' with radio buttons for 'Male' and 'Female'. At the bottom of the form, there is a red warning icon and the text 'Unblind subject', along with a 'Form History' link.

To unblind a subject:

### 1 Click **Unblind subject**:

This screenshot is identical to the previous one, but with a mouse cursor pointing to the 'Unblind subject' button, indicating the next step in the process.

The Unblind subject dialog will be displayed.

### 2 Type the reason for unblinding and select **Continue**.

The dialog box is titled 'Unblind subject' and contains a warning message: 'This will reveal the subject's treatment and unblind all personnel with permission to view this data in the study.' Below the message is a text input field labeled 'Give reason for the action'. At the bottom of the dialog, there are two buttons: 'Continue' and 'Cancel'.

### 3 Enter your password and select **Confirm**.

Unblind subject

This will reveal the subject's treatment and unblind all personnel with permission to view this data in the study.

Give reason for the action

Emergency unblinding needed

Give your password and confirm the action by clicking 'Confirm'.

Password

Confirm Cancel

The treatment is now visible in the randomization form for the unblinded subject, for all the roles with permission to view the data:

SE-01-003 Visit 1 [28 Jun 2019] Close

Form is in read-only mode.

### Randomization

DM CBA SDV [lock icon] [check icon]

SHOW HISTORY [2] [toggle]

Randomize subject

Sex

Male  Female

Treatment

Active  Placebo

### 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:

- [Undo allocation](#) - 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.
- [Replace allocation](#) - 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:

SE-01-002 Visit 1 [28 Jun 2019] Allocate Close

### Allocate a kit

Click Allocate to allocate a kit for the patient for this 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:

The action is registered in the audit trailed as **Initial data entry** and a new version of the form PDF is generated (see [Allocation actions in audit trail](#)).

**Note!** To perform an allocation after the existing allocation was undone, see [Undo allocation](#).

### 3.1 Undo allocation

To undo an existing allocation:

- 1 Open the allocation form and click **Modify**. A dialog is displayed:

- 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**:

- 4 Type the reason for undoing the allocation (this text will be shown in the audit trail afterwards, see [Allocation actions in audit trail](#)) and select **Confirm**:

Modify

Choose type of action

Replace allocation ⓘ

Undo allocation ⓘ

This undo function will remove the existing allocation, reverting the allocation to its previous state and making the allocation available for other subjects.

Select allocation

Kit allocation Visit 1

Give reason for the action

Allocation should not have been performed

Confirm Cancel

The allocation is undone and a message is displayed on the top of the form:

SE-01-002 Visit 1 [28 Jun 2019] Modify Close

Form is in read-only mode.

Allocation not complete, use 'Modify' button to allocate again.

Allocate a kit DM CRA SDV ⓘ SHOW HISTORY ⓘ

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:

- 1 Select **Modify** on the allocation form for a subject for which the previous allocation was undone:

SE-01-002 Visit 1 [28 Jun 2019] Modify Close

Form is in read-only mode.

Allocation not complete, use 'Modify' button to allocate again.

Allocate a kit DM CRA SDV ⓘ SHOW HISTORY ⓘ

Click Allocate to allocate a kit for the patient for this visit...

The Modify pop-up is displayed:

Modify

Choose type of action

Allocate ⓘ

Confirm Cancel



- 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 [Allocation actions in audit trail](#)) and select **Confirm**:

The 'Modify' dialog box contains the following elements:

- Choose type of action:** A radio button is selected for 'Allocate'.
- The allocate function will perform a new allocation.** A red informational message.
- Select allocation:** A dropdown menu showing 'Kit allocation Visit 1'.
- Give reason for the action:** A text input field containing 'Allocate a kit'.
- Buttons:** 'Confirm' and 'Cancel' buttons at the bottom.

- 3 The allocation is performed and the form is locked:

The 'Allocate a kit' form is shown in read-only mode. It includes:

- Header:** 'SE-01-002' and 'Visit 1 [28 Jun 2019]' with 'Modify' and 'Close' buttons.
- Status:** 'Form is in read-only mode.' with a red 'X' icon.
- Form Title:** 'Allocate a kit' with icons for DM, CBA, SDW, and a lock icon.
- Instruction:** 'Click Allocate to allocate a kit for the patient for this visit...' with a plus icon.
- Allocation Summary:** 'The following kit has been allocated:' with a plus icon.
- Kit Details:** 'Kit number' (1001) and 'Expiry date' (01 Jan 2020).
- Storage conditions:** 'Refrigerator, 2 to 8 degrees C'.
- History:** 'SHOW HISTORY' button with a plus icon.

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**:

The 'Allocate a kit' form is shown in read-only mode with a 'Modify' dialog box open. The dialog box contains:

- Choose type of action:** Two radio buttons: 'Replace allocation' (selected) and 'Undo allocation'.
- Buttons:** 'Confirm' and 'Cancel' buttons at the bottom.

The background form is dimmed and shows the same 'Allocate a kit' details as in the previous screenshot.

- 2 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 [Allocation actions in audit trail](#)) and click **Confirm**:

A new allocation is performed:

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

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**:

- 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:

Allocate a kit DM CRA SDV 🔒 ✅ SHOW HISTORY 2

Click Allocate to allocate a kit for the patient for this visit...

The following kit has been allocated:

Kit number: 1004    Expiry date: 04 Jan 2020

Storage conditions: Refrigerator, 2 to 8 degrees C

Expiry date	02 Jan 2020	Initial data entry   Demo User (317) 28 Jun 2019 13:42 CEST
Expiry date	02 Jan 2020 → 04 Jan 2020	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 → 1004	Kit lost by subject. Allocate new kit   Demo User (317) 28 Jun 2019 13:45 CEST
Storage conditions	Refrigerator	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:

Form History

- Version 4**  
 Saved by Demo User (317) 28 Jun 2019 08:51 CEST  
 Replace allocation
- Version 3**  
 Saved by Demo User (317) 28 Jun 2019 08:50 CEST  
 Allocation
- 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

Close



Issues and tasks

# Issues and tasks

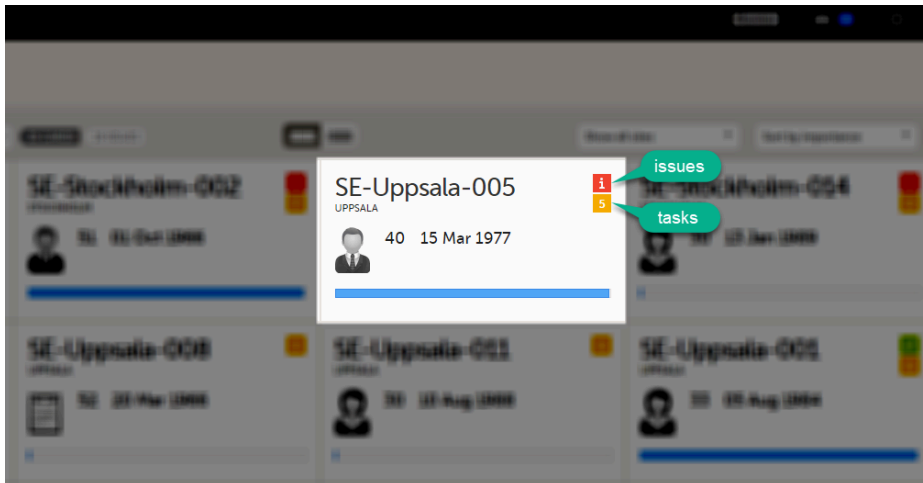
Published by Viedoc System 2023-10-09

- [1. Introduction](#)
- [2. Issues](#)
- [3. Tasks](#)

## 1 Introduction

The [Selection page](#) 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.

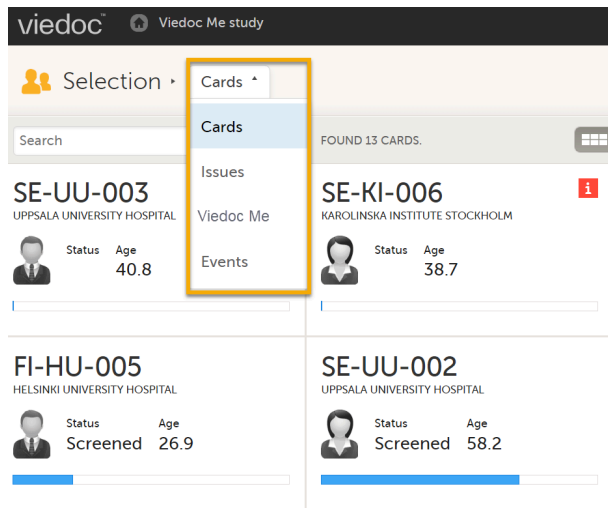


- **Red icon: Issues** - indicating that the subject has open queries and/or unconfirmed missing data. Both open queries and unconfirmed missing data should be handled and resolved by the site but, as a Monitor or Data Manager, it is important for you to be aware of these issues as well. For more details, see [Queries overview](#).
- **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.

## 2 Issues

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.

ID #	REFERENCE #	ISSUE DETAIL #	CONFIRMATION #	STATE #
SE-02-006 Uppsala	Visit 1 Lab	Missing data Demo User 07 Jul 2017 14:56 CEST		Missing data
SE-02-007 Uppsala	Visit 1 Lab Collection Date and Time	Missing data Demo User 17 Aug 2017 14:26 CEST		Missing data
SE-02-006 Uppsala	Visit 1 Lab Collection Date and Time	Is the date correct? Please verify! Demo User 01 Oct 2018 09:54 CEST		Awaits answer
SE-02-007 Uppsala	Visit 1 Lab Leukocytes	Missing data Demo User 17 Aug 2017 14:26 CEST		Missing data
SE-02-007 Uppsala	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) - 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** (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
  - **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 [Raising/Approving/Rejecting Queries](#)). 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

The screenshot displays a user interface for a clinical trial. On the left, a sidebar shows subject details for 'SE-20-003' at 'UPPSALA UNIVERSITY HOSPITAL'. The subject's status is 'Withdrawn' and their age is '70.1'. Progress indicators show '0% of study', '1/1 events', and '0/7 forms'. A 'tasks pending' box shows '8 tasks pending'. Below this, 'Common events' are listed: 'Medical / Surgical History (3)' and 'Prior and Concomitant Medications (0)'. The main area shows a 'Screening' event on '30 07 2020' with an 'Ongoing' status. A search bar and 'Show all events' dropdown are at the top. A right-hand panel lists 'Protocol date not set', 'Scheduled date not set', and 'Event date 30 07 2020'. Orange arrows point from the '8 tasks pending' box to the 'Screening' event and from the '2' icon on the event to the '2' icon on the 'Event date' row.

As soon as a task is completed, it will disappear from the views.



Resolving queries

## Resolving queries

Published by Viedoc System 2021-11-24

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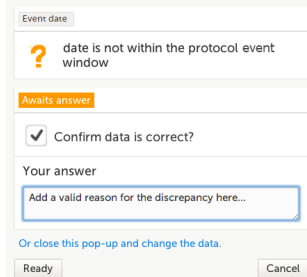
For an overview of the entire query process see [Queries overview](#).

If a query is raised during data entry, 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 after the form has been saved, the form is marked with a red issue icon .

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.



- 4 Click **Ready**.
- 5 Click **Save changes**.

See also the video tutorial [Issue: Resolve a query](#).



Exporting data

# Exporting data

Published by Viedoc System 2024-03-19

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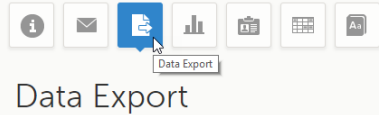
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## 1 Introduction

The Data Export page can be accessed by clicking the **Data Export** icon in the study start page:



## A Demo Study



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 ([eCRF](#)) 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 ([SAS](#))
  - Operational Data Model ([ODM](#))

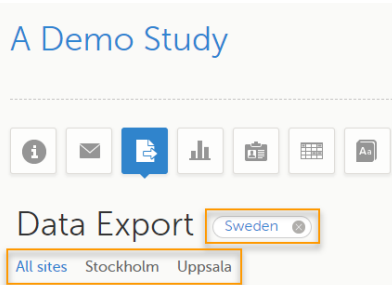
## 2 Filtering the data to be previewed/exported

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 **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.

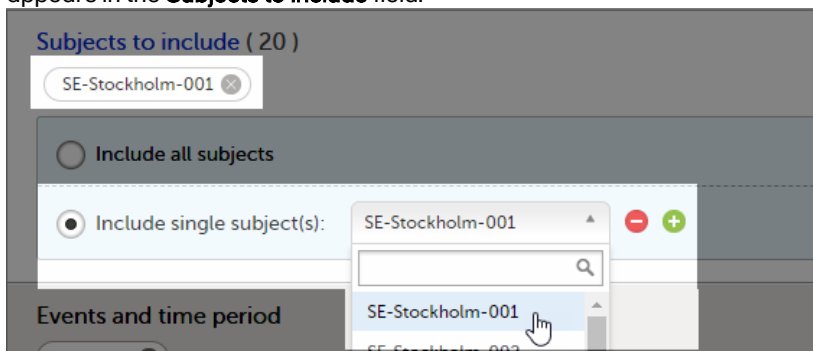
### 2.2 Including subjects

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:

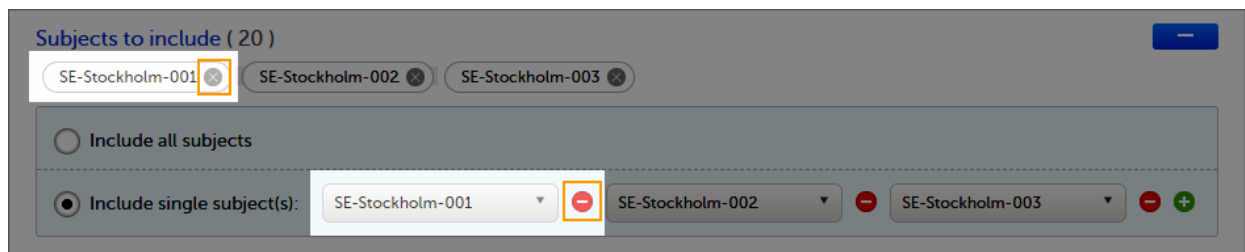
- 1 Select **Include single subject(s)**.

- 2 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:



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:



## 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 the first 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.

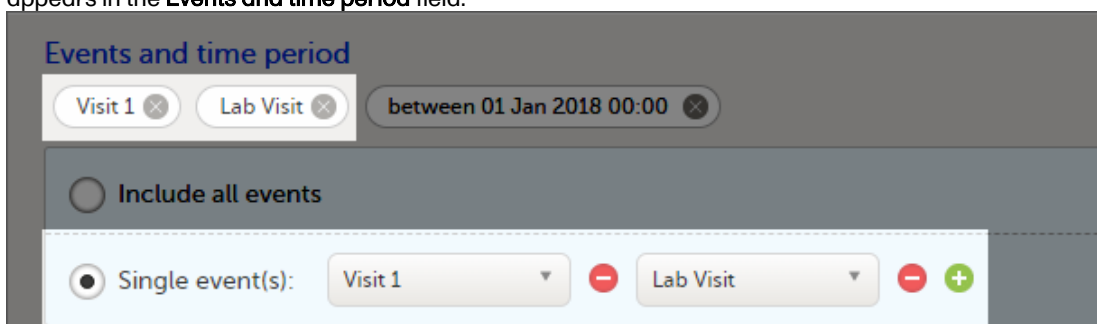
### 2.3.1 Selecting events

You can choose to:

- **Include all events** (default)
- Include **Single events**. See below the instructions for selecting single events.

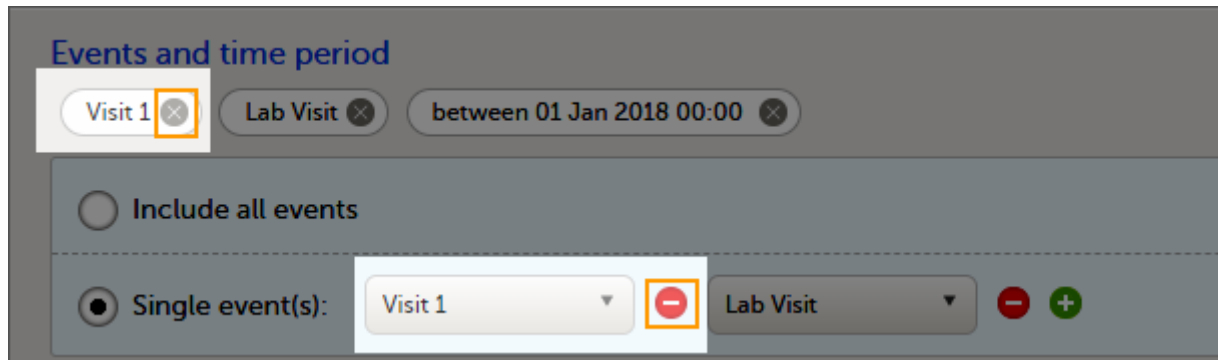
To select which events to include:

- 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:



Repeat this step for each event you want to include in the data preview/export.

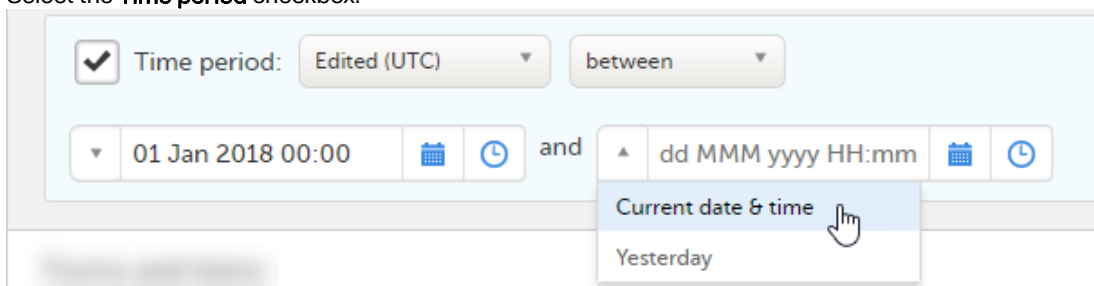
To undo the selection of certain events, click the  icon, or click the cross  icon next to the event:



### 2.3.2 Selecting a time period


To include data from a specific time period:

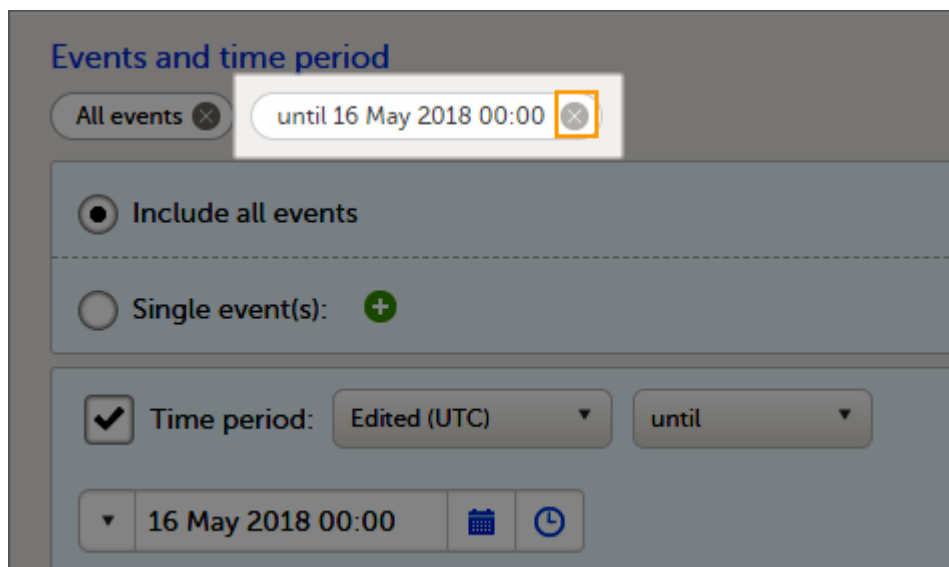
- 1 Select the **Time period** checkbox:



- 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.  
**Note!** 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  icon next to it:



## 2.4 Forms and items

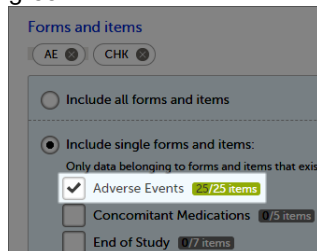
You can choose which forms and items to be included in the export output:

- **Include all forms and items** (default)
- **Include single forms and items** - see the instructions below on how to select forms and items.

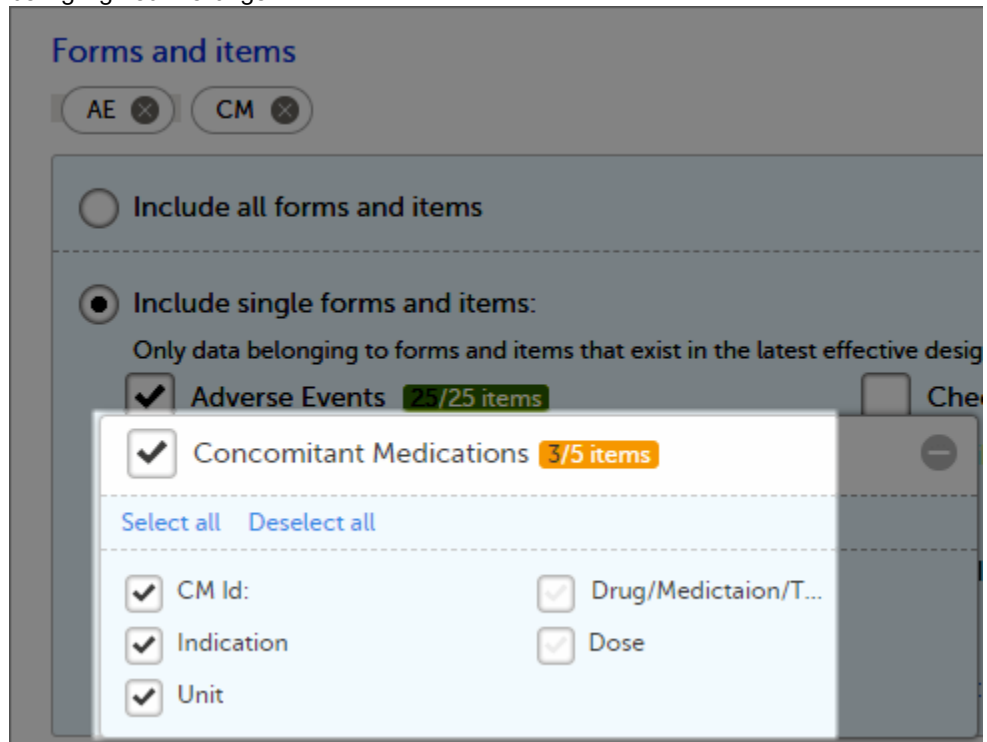
**Note!** Only data belonging to forms and items that exist in the latest effective design applied to the first of the selected sites will be included in the export. Also note that the forms and fields available to choose from are determined by the visibility settings for your user role.

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:



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 [Signing data](#).
- **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 [export output format](#), 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 history** 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](#)
- [CSV](#)
- [ODM](#) - 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
<b>Site sequence number</b>	A counter that identifies the site globally within the study
<b>Site name</b>	The site name, as set in Viedoc Admin
<b>Site code</b>	The site code, as set in Viedoc Admin
<b>Subject sequence number</b>	A counter that identifies the subject within the site
<b>Subject Id</b>	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.
<b>Booklet sequence number</b>	A counter that identifies the booklet within the sequence of booklets for the same subject
<b>Booklet Id</b>	The booklet ID, as set in the study design (in Viedoc Designer)
<b>Booklet name</b>	The booklet name, as set in the study design (in Viedoc Designer) and displayed in Viedoc Clinic
<b>Booklet status</b>	One of Not initiated, Initiated, Submitted, Received, Returned, or Frozen
<b>Booklet activity</b>	Initiated, Submitted, Recalled, Received, Frozen, Unfrozen, or Returned
<b>Date &amp; time (UTC)</b>	The date and time of the status change
<b>User name (ID)</b>	The name (ID) of the user who changed the booklet status
<b>Contract number</b>	The number of the selected contract for the specific booklet. <b>Note!</b> This column is present in the export only if the option to link the booklet to a contract is enabled for the study.
<b>Responsible Investigator</b>	User name (internal userID ) of the user selected as Responsible Investigator for the specific booklet. <b>Note!</b> 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](#))
- [CSV](#)
- Operational Data Model [ODM](#) - 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:

- [Queries in ODM export](#)
- [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 [XML](#) - when selecting **one row per item** as **Layout**, the review status is not included in the export.
- [CSV](#) - 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](#)

#### See also:

- [Review status in ODM export](#)
- [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 [XML](#)
- [CSV](#)
- [ODM](#)

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
<b>Site sequence number</b>	A counter that identifies the site globally within the study
<b>Site name</b>	The site name, as set in Viedoc Admin
<b>Site code</b>	The site code, as set in Viedoc Admin
<b>Subject sequence number</b>	A counter that identifies the subject within the site
<b>Subject Id</b>	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.
<b>Event Id</b>	The event ID, as set in the study design (in Viedoc Designer)
<b>Event name</b>	The event name, as set in the study design (in Viedoc Designer) and displayed in Viedoc Clinic
<b>Event repeat key</b>	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.
<b>Event status</b>	The current status of the event. It can be one of the following: <ul style="list-style-type: none"> <li>▪ <i>Initiated</i></li> <li>▪ <i>Proposed</i></li> <li>▪ <i>Not Initiated</i></li> <li>▪ <i>Planned</i></li> </ul>
<b>Event date</b>	The event date, as set in Viedoc Clinic when the event is initiated
<b>Planned date</b>	The event planned date, as set in Viedoc Clinic when the event is planned
<b>Proposed date</b>	The proposed date for the event, if set in the study design
<b>Window start date</b>	The event time window start date, if set in the study design.
<b>Window end date</b>	The event time window end date, if set in the study design
<b>Initiated by</b>	The name and ID of the user who initiated the event
<b>Initiated date (UTC)</b>	The date and time ( <a href="#">UTC</a> ) when the event was initiated
<b>Last edited by</b>	The name and ID of the user who last edited the event
<b>Last edited date (UTC)</b>	The date and time ( <a href="#">UTC</a> ) when the event was last edited
<b>Design version</b>	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, [CSV](#), [ODM](#)) 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 [XML](#)
- [CSV](#)

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
<b>Site sequence number</b>	A counter that identifies the site globally within the study
<b>Site name</b>	The site name, as set in Viedoc Admin
<b>Site code</b>	The site code, as set in Viedoc Admin
<b>Subject sequence number</b>	A counter that identifies the subject within the site
<b>Subject Id</b>	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.
<b>Event sequence number</b>	A counter that identifies the event within the sequence of events for the same subject
<b>Event Id</b>	The event ID, as set in the study design (in Viedoc Designer)
<b>Event name</b>	The event name, as set in the study design (in Viedoc Designer) and displayed in Viedoc Clinic
<b>Event repeat key</b>	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.



Column name	Description
<b>Activity Id</b>	The activity ID, as set in the study design (in Viedoc Designer)
<b>Activity name</b>	The activity name, as set in the study design (in Viedoc Designer) and displayed in Viedoc Clinic
<b>Form Id</b>	The form ID, as set in the study design (in Viedoc Designer)
<b>Form name</b>	The form name, as set in the study design (in Viedoc Designer) and displayed in Viedoc Clinic
<b>Event date</b>	The event date, as set in Viedoc Clinic when the event is initiated
<b>Pending since</b>	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](#).
- [CSV](#) - 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](#)
- [CSV](#)
- PDF - [PDF/A](#)
- [ODM](#)

#### 2.5.2.9 Subject status

The subject status can be exported to the following export output formats:

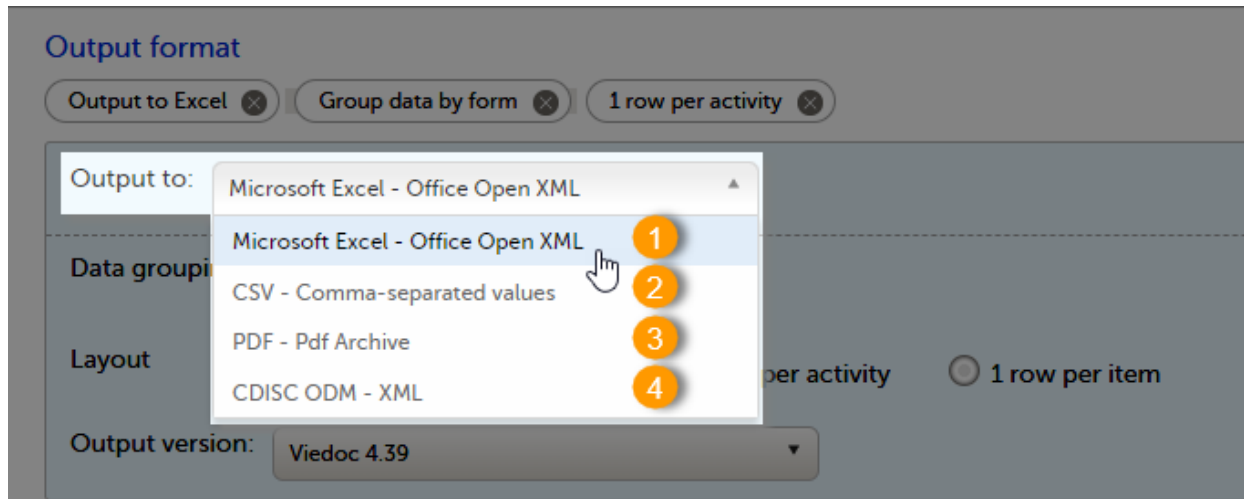
- Microsoft Excel - Office Open [XML](#)
- [CSV](#)
- [ODM](#)

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:**



You can export the data to one of the following formats:

1. Microsoft Excel - Office Open [XML](#)
2. [CSV](#)
3. PDF - [PDF/A](#)
4. [ODM](#)

### 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 [CSV](#) 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 [Excel export](#).

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](#).

### 3.3 PDF

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 to export the data to an [ODM](#) 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 checked.

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 [SDV](#), raising and approving queries, medical coding, lock, [CRA](#) and [DM](#) reviews.

See also:

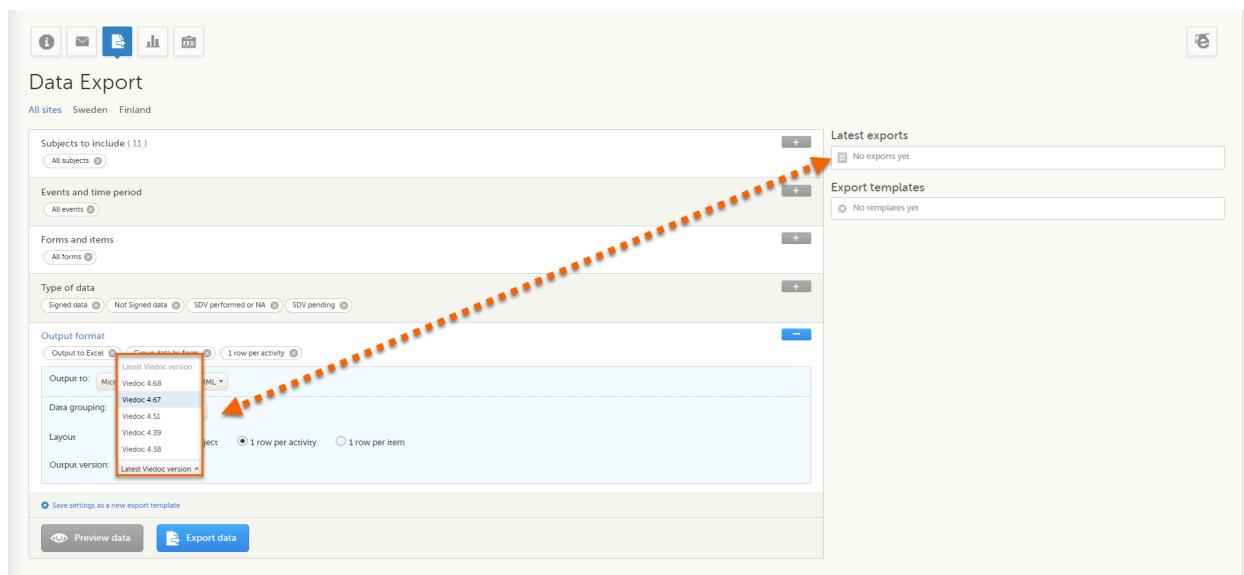
- [Queries in ODM export](#)
- [Medical coding in ODM export](#)
- [Review status in ODM export](#)
- [Excel export](#) (See for more information on how to export Audit trail history.)

## 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.

**Note!** 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 [CSV](#), 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 [ODM](#), 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 only those versions in which changes to the data structure were introduced.

As of Viedoc release 4.77, 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.

Output version	Changes in data structure
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 4.51**, the following changes to the export output were introduced:

File type	Changes in the export output format
Excel	<p>Addition of three columns for the new form sequence numbers introduced:</p> <ul style="list-style-type: none"> <li>▪ <code>SubjectFormSeqNo</code> – 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>▪ <code>OriginSubjectFormSeqNo</code> – 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 <code>SubjectFormSeqNo</code> .</li> <li>▪ <code>SourceSubjectFormSeqNo</code> – 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 <code>SubjectFormSeqNo</code> from which the form instance was copied. For 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: <code>v4:SubjectFormSeqNo</code> , <code>v4:OriginSubjectFormSeqNo</code> and <code>v4:SourceSubjectFormSeqNo</code> , within the <code>FormData</code> , right after the <code>FormRepeatKey</code> .
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	Addition of a column for Form sequence number ( <code>FormSeq</code> ) that contains the <code>FormRepeatKey</code> .
ODM	The <code>FormRepeatKey</code> now contains the activity ID as well, in the following format: <code>FormRepeatKey\$ActivityId</code> . The <code>ExportVersion</code> attribute has been added to the ODM.
PDF	The summary formats are used to display the event and form names.

## 5 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**.

## 5.1 Data table

On the data tab, you can preview the data in table format:




The screenshot shows the 'Export Data Preview / AutoRecurring' window. At the top, there are navigation icons and a 'Close' button. Below that, there are controls for 'Included forms' (1) set to 'Screening Diary / SCRD', a 'Filter' text box (2) with a search input, and view toggle buttons (3). The main area is a table with columns: Site name, Site code, Subject Id, Event name, Event date, Activity name, and Completion period. The table contains 15 rows of data for 'AutoRecur1' at site 'AR1', all for 'Screening - Visit 1a' events between 2018-01-15 and 2018-01-17. The 'Completion period' column contains hyperlinks like 'Prior to or during the BPS' (4) and 'After the BPS' (7). A 'Cross-check' checkbox (8) is located below the table.

Site name	Site code	Subject Id	Event name	Event date	Activity name	Completion period
AutoRecur1	AR1	AR1-50001	Screening - Visit 1a	2018-01-15		<a href="#">Prior to or during the BPS</a>
AutoRecur1	AR1	AR1-50002	Screening - Visit 1a	2018-01-17		<a href="#">After the BPS</a>
AutoRecur1	AR1	AR1-50003	Screening - Visit 1a	2018-01-17		<a href="#">After the BPS</a>
AutoRecur1	AR1	AR1-50004	Screening - Visit 1a	2018-01-17		<a href="#">Prior to or during the BPS</a>
AutoRecur1	AR1	AR1-50005	Screening - Visit 1a	2018-01-17		<a href="#">Prior to or during the BPS</a>
AutoRecur1	AR1	AR1-50006	Screening - Visit 1a	2018-01-17		<a href="#">After the BPS</a>
AutoRecur1	AR1	AR1-50008	Screening - Visit 1a	2018-01-17		<a href="#">After the BPS</a>
AutoRecur1	AR1	AR1-50009	Screening - Visit 1a	2018-01-17		<a href="#">Prior to or during the BPS</a>
AutoRecur1	AR1	AR1-50010	Screening - Visit 1a	2018-01-17		<a href="#">Prior to or during the BPS</a>
AutoRecur1	AR1	AR1-50013	Screening - Visit 1a	2018-01-17		<a href="#">Prior to or during the BPS</a>
AutoRecur1	AR1	AR1-50014	Screening - Visit 1a	2018-01-17		<a href="#">After the BPS</a>
AutoRecur1	AR1	AR1-50015	Screening - Visit 1a	2018-01-17		<a href="#">Prior to or during the BPS</a>

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.

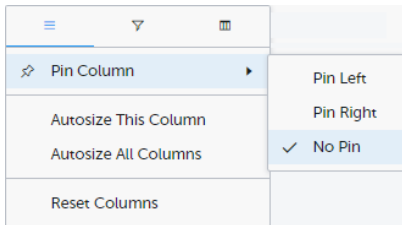
### 5.1.1 Column menu

The column menu contains:

- column display options 
- column filter 
- column selection options 

For more information, see the following sub-sections.

#### 5.1.1.1 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.

### 5.1.1.2 Column filter

Use the column filters to narrow down the selection of preview data.

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:

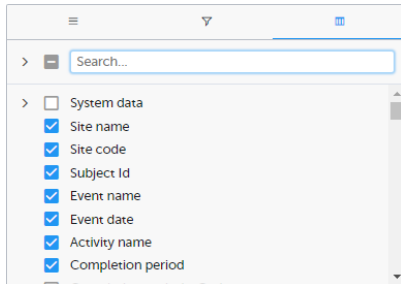
- Equals
- Not equal
- Less than
- Less than or equals
- Greater than
- Greater than or equals
- In range

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.

### 5.1.1.3 Column selection options

Select the columns to be displayed in the preview table.

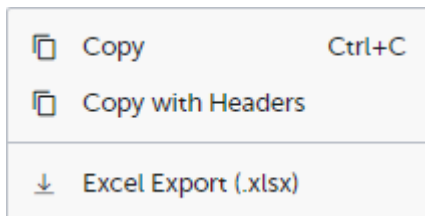


Use the **Search** field to search for columns.

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 [Excel export](#).

### 5.1.2 Data table context menu

When you right-click in a cell in the data table, this context menu is displayed:



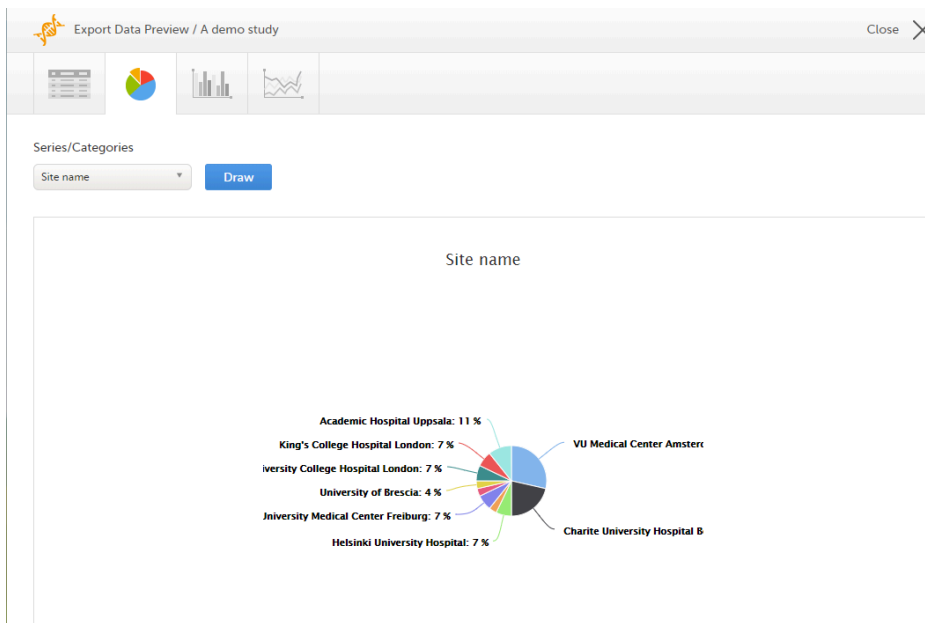
**Copy:** Copies the cell value to your clipboard.

**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.

## 5.2 Pie chart

Select the data set you wish to plot in a chart, and click **Draw**:



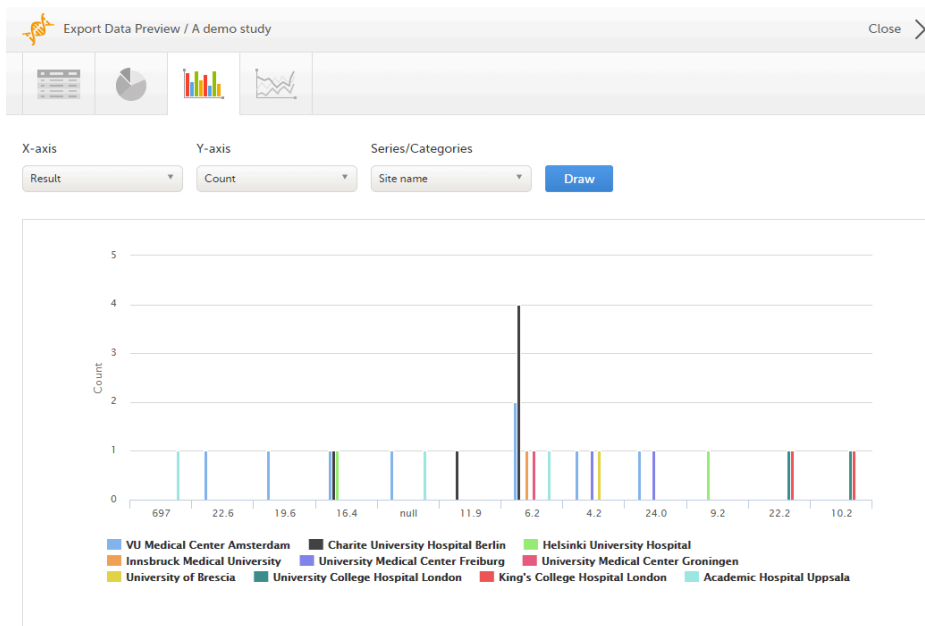
If you have selected **Group data by form**, you can only choose data sets from the form you have selected on the data table tab.

Click any 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.

### 5.3 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.

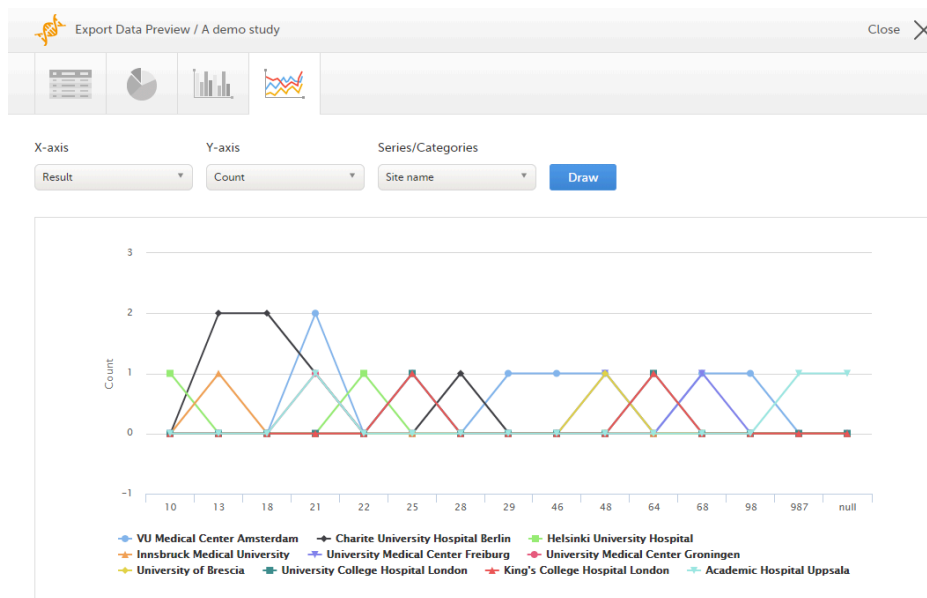
Click any column to view details of the data.

**Note!** 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.

### 5.4 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.

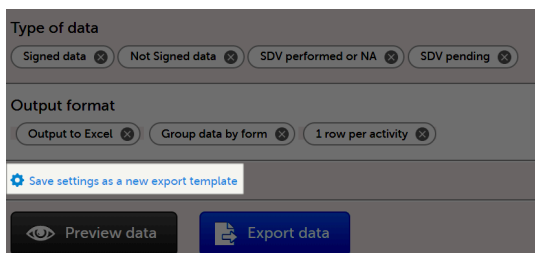
## 6 Data export templates

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.

### 6.1 Saving export settings as a template

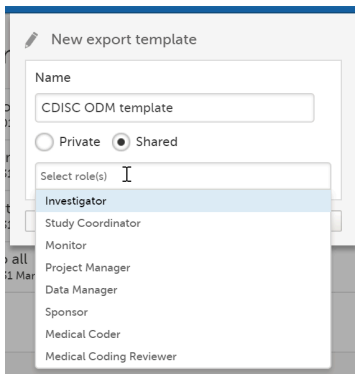
To save your settings as a template:

- 1 Click **Save settings as a new export template**.

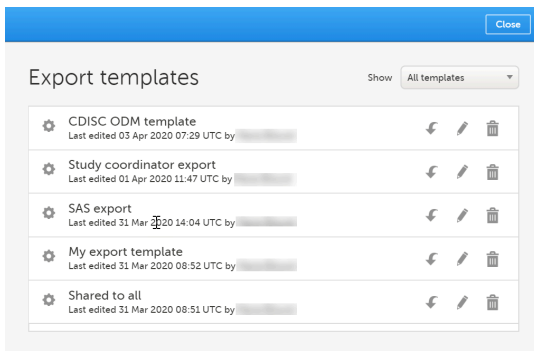


- 2 In the pop-up that is displayed, enter a name for the template and select whether it should be private or shared.

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.



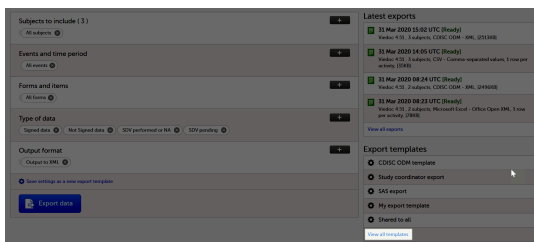
- 3 Click **Save**. Now the **Export templates** list is displayed, with your newly created template at the top of the list:



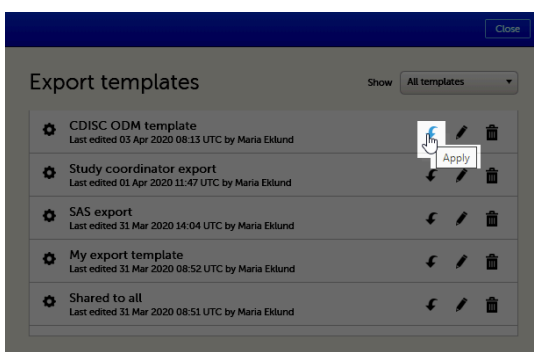
## 6.2 Applying a data export template

To apply a data export template:

- 1 Click **View all templates** in the **Export templates** area of the **Data export** page.

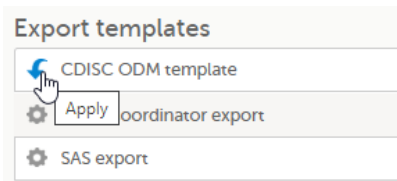


- 2 Click the apply icon for the template that you want to apply.



- 3 Click **Export data** to perform an export with the settings in the template.

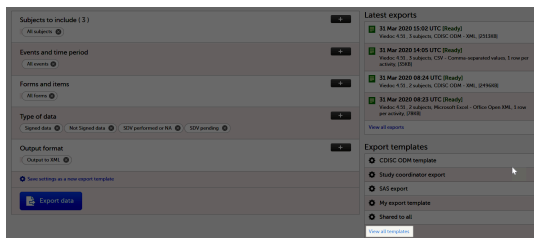
**Tip!** Alternatively, you can use the quick access apply, available in the **Export templates** area:



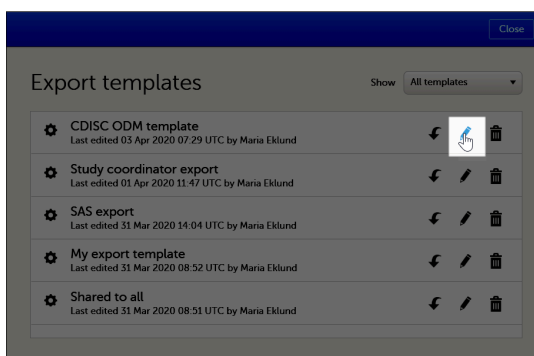
## 6.3 Editing a data export template

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.



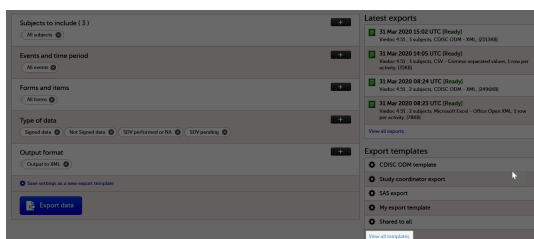
- 3 In the pop-up that is displayed, you can edit the name of the export template and the settings for **Private/Shared**.

**Note!** You can only edit a template that you created yourself.

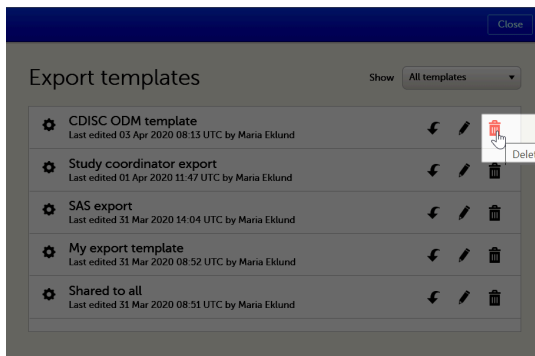
## 6.4 Deleting a data export template

To delete a data export template:

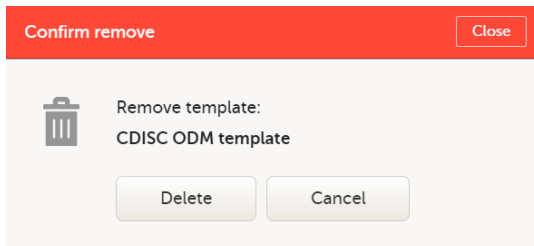
- 1 Click **View all templates** in the **Export templates** area of the **Data export** page.



- 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**.

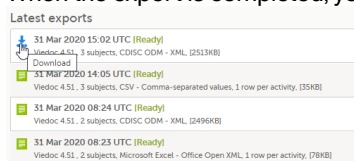


**Note:** You can only delete a data export template that you created yourself.

## 7 Exporting data

To perform a data export:

- 1 Filter the data to be exported. See [Filtering the data to be exported](#).
- 2 Select the [Output format](#).
- 3 Optionally, select the [Output version](#).
- 4 Optionally, [preview the data](#) 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*.

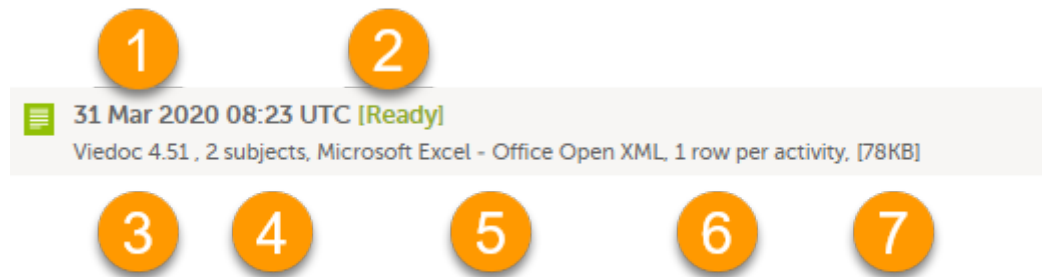
**Note!** If any of the characters that are invalid for a filename in Windows are used within any of the *SponsorCode* or *SiteCode*, these characters will be automatically replaced with - within the exported filename.

## 7.1 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.

**Note!** 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.

Latest exports	
	2012-09-12 22:50 [In queue] Viedoc 4.51, 31 subjects, 1 row per activity, [45KB]
	2012-09-11 15:27 [Ready] Viedoc 4.51, 31 subjects [45KB]
	2012-09-11 15:27 [Ready] Viedoc 4.51, 31 subjects [45KB]
	2012-09-11 15:27 [No data] Viedoc 4.51, 31 subjects [0KB]
	2012-09-11 15:27 Removed due to data anonymization

[View all exports](#)



Excel export

# Excel export

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- 

## 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, only if the **Review status** was selected to be included in the export
- 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 [Do not group data](#).

- **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**

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 style="list-style-type: none"> <li>▪ <i>README</i></li> <li>▪ one separate sheet for each form</li> <li>▪ <i>Items</i></li> <li>▪ <i>CodeLists</i></li> </ul>	<ul style="list-style-type: none"> <li>▪ <i>README</i></li> <li>▪ <i>Data</i></li> <li>▪ <i>Items</i></li> <li>▪ <i>CodeLists</i></li> </ul>
one row per activity	<ul style="list-style-type: none"> <li>▪ <i>README</i></li> <li>▪ one separate sheet for each form</li> <li>▪ <i>Items</i></li> <li>▪ <i>CodeLists</i></li> </ul>	<ul style="list-style-type: none"> <li>▪ <i>README</i></li> <li>▪ <i>Data</i></li> <li>▪ <i>Items</i></li> <li>▪ <i>CodeLists</i></li> </ul>
one row per item	<ul style="list-style-type: none"> <li>▪ <i>README</i></li> <li>▪ one separate sheet for each form</li> </ul>	<ul style="list-style-type: none"> <li>▪ <i>README</i></li> <li>▪ <i>Data</i></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 number	Site name	Site code	Subject sequence number	Subject Id	Event sequence 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:

Race__2	Race__2 - Code
DMRACE__2	DMRACE__2CD
Native Hawaiian	4
Native Hawaiian	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 only the signed data, as illustrated in the image below:

**Type of data**

Signed data   
  SDV performed or NA   
  SDV pending

---

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 sequence number	Site name	Site code	Subject sequence number	Subject Id	Event sequence number	Event Id	Event name	Event date	Activity Id	Activity name	Form sequence number	Design version	Gender	Code	Date of Birth	Age	Number	PI2	Empty cells on row may be due to export filter
SiteSeq	SiteName	SiteCode	SubjectSeq	SubjectId	EventSeq	EventId	EventName	EventDate	ActivityId	ActivityName	FormSeq	DesignVer	GENDER	GENDERCD	DOB	AGE	PI2	HAS_FILTERED_VALUES	
1	Stockholm	D8	2	EH-D8-002	1	AP	Add Patien	2017-08-11	APA		1	2.0	Male	M	1966-10-01	51			
2	Uppsala	Uppsala:2	2	SE-Uppsala	1	AP	Add Patien	2017-08-11	APA		1	2.0	Female	F	1959-09-21	58			
2	Uppsala	Uppsala:2	5	SE-Uppsala	1	AP	Add Patien	2017-08-11	APA		1	2.0	Male	M	1977-03-15	40			
2	Uppsala	Uppsala:2	15	SE-Uppsala	1	AP	Add Patien	2018-10-12	APA		1	14.2	Female	F	1965-02-22	54			
2	Uppsala	Uppsala:2	17	SE:Uppsala	1	AP	Add Patien	2018-11-12	APA		1	19.0	Male	M	1989-11-24	29			
2	Uppsala	Uppsala:2	19	SE:Uppsala	1	AP	Add Patien	2018-11-30	APA		1	20.2	Male	M	1954-02-10	65			
2	Uppsala	Uppsala:2	20	SE:Uppsala	1	AP	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	M		63		X	

### 4 Data grouping

You can select whether the data should be grouped by form or not, from the **Data grouping** dropdown list.

**Note!** The data grouping is available only for the Excel/Comma-Separated Values (CSV) output.



## 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
<b>Site Sequence number</b>	Counter that identifies the site globally within the study.
<b>Site name</b>	The site name, as set in Viedoc Admin.
<b>Site code</b>	The site code, as set in Viedoc Admin.
<b>Subject sequence number</b>	Counter that identifies the subject within the site.
<b>Subject Id</b>	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.
<b>Event sequence number</b>	Counter that identifies the event within the sequence of events for the same subject.
<b>Event Id</b>	The event ID, as set in the study design (in Viedoc Designer).
<b>Event name</b>	The event name, as set in the study design (in Viedoc Designer) and displayed in Viedoc Clinic.
<b>Event date</b>	The event date, as set in Viedoc Clinic when the event is initiated.
<b>Activity Id</b>	The activity ID, as set in the study design (in Viedoc Designer).
<b>Activity name</b>	The activity name, as set in the study design (in Viedoc Designer) and displayed in Viedoc Clinic.
<b>Form sequence number</b>	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.
<b>Subject form sequence number</b>	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.
<b>Origin Subject form sequence number</b>	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 <code>SubjectFormSeqNo</code> .
<b>Source Subject form sequence number</b>	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 <code>SubjectFormSeqNo</code> from which the form instance was copied. For the first instance of the form (not copied) it is empty (null).
<b>Design version</b>	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**.



## 5 Layout

In the **Layout** section, you can select whether the data should be organized in the output file as:

- [one row per subject](#)
- [one row per activity](#) (default)
- [one row per item](#)

### 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**.

Form	Standard info for all forms	Form specific info (items)
1 Academic AHU	Subject sequence number: 1, Subject Id: SE-AHU-001	3.0, 2016-07-04, Male, 1, 1964-06-11, 52.1
2 Academic AHU	Subject sequence number: 2, Subject Id: SE-AHU-002	3.0, 2016-10-02, Female, 2, 1979-05-28, 37.3
3 Academic AHU	Subject sequence number: 3, Subject Id: SE-AHU-003	3.0, 2016-09-04, Male, 1, 1968-08-04, 48.1
4 Academic AHU	Subject sequence number: 4, Subject Id: SE-AHU-004	3.0, 2016-06-05, Male, 1, 1952-10-01, 63.7
5 Academic AHU	Subject sequence number: 5, Subject Id: SE-AHU-005	3.0, 2016-08-07, Female, 2, 1959-04-06, 57.3
1 Charite Uni CUB	Subject sequence number: 1, Subject Id: DE-CUB-001	3.0, 2016-08-07, Male, 1, 1980-02-22, 36.5
2 Charite Uni CUB	Subject sequence number: 2, Subject Id: DE-CUB-002	3.0, 2016-03-02, Male, 1, 1960-11-02, 55.3
1 VU Medica VUA	Subject sequence number: 1, Subject Id: NL-VUA-001	3.0, 2016-10-02, Male, 1, 1961-07-31, 55.2
2 VU Medica VUA	Subject sequence number: 2, Subject Id: NL-VUA-002	3.0, 2016-08-07, Male, 1, 1973-12-21, 42.6
6 Academic AHU	Subject sequence number: 6, Subject Id: SE-AHU-006	12.0, 2016-10-02, Female, 2, 1976-02-01, 40.7

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
<b>Site name</b>	The site name, as set in Viedoc Admin.
<b>Site code</b>	The site code, as set in Viedoc Admin.
<b>Subject sequence number</b>	Counter that identifies the subject within the site.
<b>Subject Id</b>	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 [Do not group data](#)):
   
 <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 only for the unscheduled/common 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 [Group data by form](#)), 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 not 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).

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
	Site sequence number	Site name	Site code	Subject sequence number	Subject Id	Event sequence number	Event Id	Event name	Event date	Activity Id	Activity name	Form sequence number	Design version	Physical Examination performed	Physical Examination performed - Code
1	SiteSeq	SiteName	SiteCode	SubjectSeq	SubjectId	EventSeq	EventId	EventName	EventDate	ActivityId	ActivityName	FormSeq	DesignVer	PEYN	PEYNCD
3	1	Academic f	AHU	11	SE-AHU-011	1	V1	Visit 1	2017-10-20	V1		1	32.0	Yes	1
4	1	Academic f	AHU	14	SE-AHU-014	1	V1	Visit 1	2017-11-10	V1		1	33.0	No	0
5	1	Academic f	AHU	14	SE-AHU-014	1	UNS_1	Unscheduled	2017-11-13	UNS_1		1	34.0	Yes	1
6	1	Academic f	AHU	18	SE-AHU-018	1	V1	Visit 1	2017-11-14	V1		1	36.0	Yes	1
7	1	Academic f	AHU	22	SE-AHU-022	1	V1	Visit 1	2017-11-14	V1		1	39.0	Yes	1
8	1	Academic f	AHU	23	SE-AHU-023	1	V1	Visit 1	2017-10-16	V1		1	27.0	Yes	1
9	1	Academic f	AHU	23	SE-AHU-023	1	V3	Visit 3	2017-10-27	V4		1	33.0	Yes	1
10	1	Academic f	AHU	24	SE-AHU-024	1	V1	Visit 1	2017-11-01	V1		1	33.0	Yes	1
11	1	Academic f	AHU	24	SE-AHU-024	1	V3	Visit 3	2017-11-14	V4		1	39.0	Yes	1
12	1	Academic f	AHU	32	SE-AHU-032	1	V1	Visit 1	2017-11-21	V1		1	44.0	Yes	1
13	1	Academic f	AHU	34	SE-AHU-034	1	V1	Visit 1	2017-11-21	V1		1	46.0	Yes	1
14	1	Academic f	AHU	36	SE-AHU-036	1	V1	Visit 1	2017-11-20	V1		1	44.0	Yes	1
15	1	Academic f	AHU	43	SE-AHU-043	1	V1	Visit 1	2018-01-01	V1		1	51.0	Yes	1
16	1	Academic f	AHU	44	SE-AHU-044	1	V1	Visit 1	2018-01-02	V1		1	51.0	Yes	1
17	1	Academic f	AHU	50	SE-AHU-050	1	V1	Visit 1	2018-01-06	V1		1	55.0	Yes	1
18	1	Academic f	AHU	73	SE-AHU-073	1	V1	Visit 1	2018-03-20	V1		1	57.0	Yes	1
19	1	Academic f	AHU	75	SE-AHU-075	1	V1	Visit 1	2018-08-13	V1		1	59.0	Yes	1

## 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).

1	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
2	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
3	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	1	V1	Visit 1	2017-10-20	V1		PE	Physical Examination	1	PEG5	1	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 reas
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	1	UNS_1	Unscheduled	2017-11-13	UNS_1		PE	Physical Examination	1	PEG6	1	PERERES	Respiratory - result

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).
- **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:

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	checkboxes1	Check boxes - 1	1
Eligibility	IE	Eligibility	1	IEG10	1	checkboxes2	Check boxes - 2	1
Eligibility	IE	Eligibility	1	IEG10	1	checkboxes3	Check boxes - 3	1
Eligibility	IE	Eligibility	1	IEG10	1	checkboxes4	Check boxes - 4	1
Eligibility	IE	Eligibility	1	IEG10	1	checkboxes5	Check boxes - 5	1
Eligibility	IE	Eligibility	1	IEG10	1	checkboxes6	Check boxes - 6	1
Eligibility	IE	Eligibility	1	IEG10	1	checkboxes1	Check boxes - 1	2
Eligibility	IE	Eligibility	1	IEG10	1	checkboxes2	Check boxes - 2	2
Eligibility	IE	Eligibility	1	IEG10	1	checkboxes3	Check boxes - 3	2
Eligibility	IE	Eligibility	1	IEG10	1	checkboxes4	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**).

## 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 per linked form instance, 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-ActivityId-FormId-FormSeq.

Name of drug / medication / therapy	Reason for administration	Adverse event link 1	Adverse event link 1 - Identifier	Adverse event link 2	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:

<b>Header rows, one row per activity</b>	
<b>Row 1: Data column</b>	Item Label, Counter of the selected link starting at one
<b>Row 1: Identifier column</b>	Item Label, Counter of the selected link starting at one, Identifier
<b>Row 2: Data column</b>	Item ID, Counter of the selected link starting at one
<b>Row 2: Identifier column</b>	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 one row per linked form instance.

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	0
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	0
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 per linked form instance to the exported file, the Data column and the Identifier column:

Prior and Concomitant Medications(1)-(1)Medical history link(s) 1	Prior and Concomitant Medications(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:

<b>Header rows, one row per subject</b>	
<b>Row 1: Data column</b>	Event Label (event counter), Activity label (activity counter), Item label (counter of the selected link.)
<b>Row 1: Identifier column</b>	Event Label (event counter), Activity label (activity counter), Item label (counter of the selected link), Identifier
<b>Row 2: Data column</b>	Event ID (event counter), Activity ID (activity counter), Item ID (counter of the selected link.)
<b>Row 2: Identifier column</b>	Event ID (event counter), Activity ID (activity counter), Item ID, (counter of the selected link), ID

## 7 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:

Site sequence number	Site name	Site code	Subject sequence number	Subject Id	Event sequence number	Event Id	Event name	Event date	Activity Id	Activity name	Form sequence number	Design version	Vital Signs done? - Code	Vital Signs done? - VS_YN	Vital Signs done? - VS_YNCD	Date/Time	Not measured reason	Heart rate	Body temperature	Systolic BP	Diastolic BP
1	Academic Hospital Uppsala	AHU	48	SE-AHU-048	1	V1	Visit 1	2018-01-01	V1	V1	1	55.0	Yes	1	2018-01-01 00:00		61	37.0	120	65	
4	Academic Hospital Uppsala	AHU	48	SE-AHU-048	1	V2	Visit 2	2018-01-05	V2	V2	1	55.0	Yes	1	2018-01-05 00:00		62	37.1	125	70	
5	Academic Hospital Uppsala	AHU	48	SE-AHU-048	1	V3	Visit 3	2018-01-06	ACT_2	ACT_2	1	55.0	Yes	1	2018-01-06 00:00		62	37.2	130	65	
6	Academic Hospital Uppsala	AHU	48	SE-AHU-048	2	V3	Visit 3	2018-01-07	ACT_2	ACT_2	1	55.0	Yes	1	2018-01-07 00:00		64	37.4	125	70	
7	Academic Hospital Uppsala	AHU	48	SE-AHU-048	3	V3	Visit 3	2018-01-08	ACT_2	ACT_2	1	55.0	Yes	1	2018-01-08 00:00		65	37.5	125	75	
8	Academic Hospital Uppsala	AHU	48	SE-AHU-048	4	V3	Visit 3	2018-01-09	ACT_2	ACT_2	1	55.0	Yes	1	2018-01-09 00:00		66	37.6	125	70	

**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 `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:

Site sequence number	Site name	Site code	Subject sequence number	Subject Id	Event sequence number	Event Id	Event name	Event date	Activity Id	Activity name	Form sequence number	Design version	Collection Date and Time	Result	Low Normal	High Normal
1	Academic Hospital Uppsala	AHU	44	SE-AHU-044	1	V2	Visit 2	2018-01-08	V2	V2	1	51.0	2018-01-08 00:00	4589	4000	8000
4	Academic Hospital Uppsala	AHU	44	SE-AHU-044	1	V2	Visit 2	2018-01-08	V2	V2	2	51.0	2018-01-09 13:26	6987	5500	11000
5	Academic Hospital Uppsala	AHU	44	SE-AHU-044	1	V2	Visit 2	2018-01-08	V2	V2	3	51.0	2018-01-08 00:00	5877	5500	11000

**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**.

## 9 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:

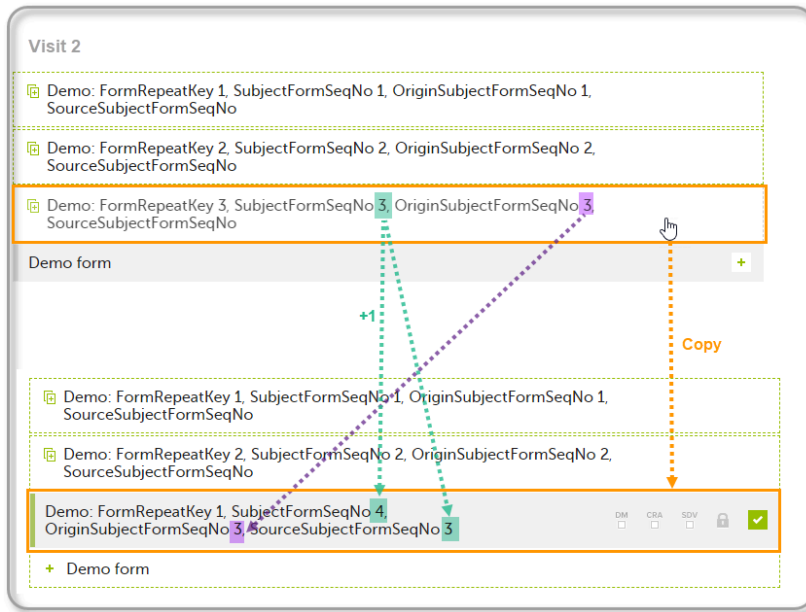
- 1 Initiate Visit 1 and fill-in three instances of the Demo form, these instances will get the sequence numbers as illustrated below:

The screenshot shows a window titled "Visit 1" containing three active form instances. Each instance is represented by a row with the following text: "Demo: FormRepeatKey X, SubjectFormSeqNo X, OriginSubjectFormSeqNo X, SourceSubjectFormSeqNo". The values of X are 1, 2, and 3 respectively. To the right of each row are icons for DM, CRA, SDV, a lock icon, and a green checkmark icon. Below the three rows is a dashed line and a "+ Demo form" button.

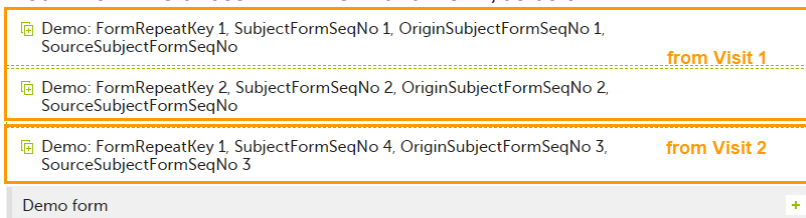
- 2 Initiate Visit 2. Demo form will be available to be initiated by copying data from one of the previously filled-in form instances within Visit 1, so all the three instances will be shown as ghost forms:

The screenshot shows a window titled "Visit 2" containing three ghost form instances. Each instance is represented by a row with a ghost icon (a square with a diagonal line) and the following text: "Demo: FormRepeatKey X, SubjectFormSeqNo X, OriginSubjectFormSeqNo X, SourceSubjectFormSeqNo". The values of X are 1, 2, and 3 respectively. Below the three rows is a dashed line and a "+ Demo form" button.

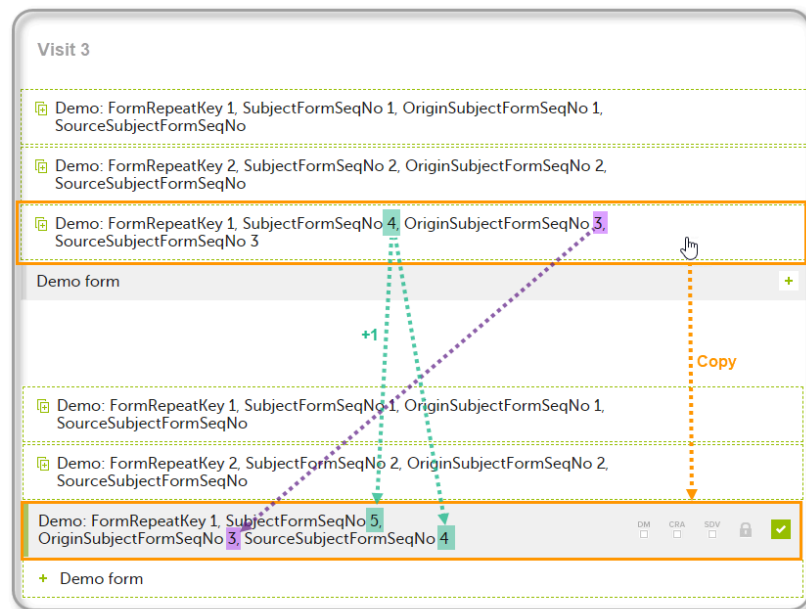
- 3 Create an instance of Demo form within Visit 2 by copying the data from the third instance of the form filled in within Visit 1. This will result in the new form instance getting the sequence numbers as illustrated below:



- 4 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}

Notes!

- 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 allow to track, for the form instances that were initiated by copying data from previous events, where the data originates from, as below:

Form sequence number	Subject form sequence number	Origin Subject form sequence number	Source Subject form sequence number	Design 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

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## 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.
- **Note!** 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.

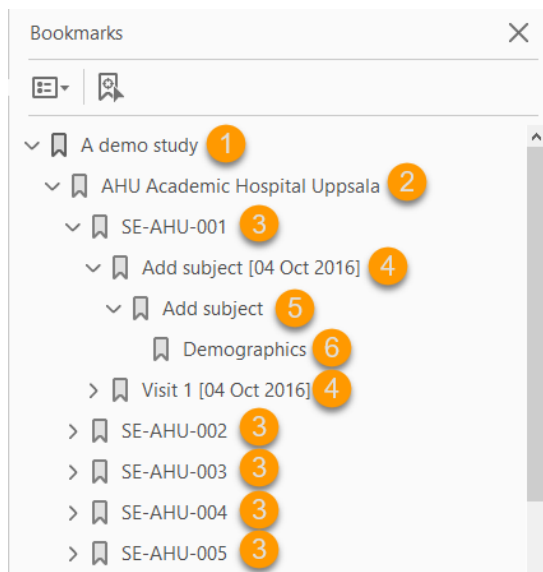
Name	Type
AHU Academic Hospital Uppsala	Adobe Acrobat Document
CUB Charite University Hospital Berlin	Adobe Acrobat Document
HUH Helsinki University Hospital	Adobe Acrobat Document
IMU Innsbruck Medical University	Adobe Acrobat Document
KCH King's College Hospital London	Adobe Acrobat Document
KIS Karolinska 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):

Name	Type	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

### 3 PDF file structure/content

This section describes the structure of the exported PDF file.



The file is structured as follows:

- A study summary on the [first page](#).
- A [site summary page](#).
- One separate sub-section for each [subject](#) in the respective site.
- For each subject, one sub-section for each event.
- For each event, one sub-section for each activity.
- 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 [Entering/editing data](#).

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:



#### 2 A demo study

An open-label, multi center, dose escalation study investigating the safety, tolerability and ...

FPA: 04 Oct 2016 LPA: 27 Aug 2018  
5 Sites: In this archive: 1 Study total: 20  
Subjects: In this archive: 71 Study total: 115 6

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 <sup>1</sup> Academic Hospital Uppsala <sup>2</sup>

<sup>3</sup> Site code	AHU	Country	Sweden <sup>4</sup>
<sup>5</sup> Time zone	(UTC+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna		
<sup>6</sup> FPA	04 Oct 2016	LPA	27 Aug 2018 <sup>7</sup>
<sup>8</sup> Subjects (in this archive/total)	71/71		

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 <sup>1</sup>  
**SE-AHU-023** <sup>2</sup>

<sup>3</sup> Subject added	17 Nov 2017 11:11 CET	<sup>4</sup> Forms (in this archive/total)	23/24
----------------------------	-----------------------	--	-------

---

<sup>5</sup> Contents

Add subject [17 Nov 2017]		Initiated	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.

### 3.4 Event summary page

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**

<b>4</b>	Visit 1 [16 Oct 2017]	<b>5</b>	Awaits signing	<b>6</b>	8
	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 [Entering/editing data](#).

#### 3.4.1 The sort order of the forms

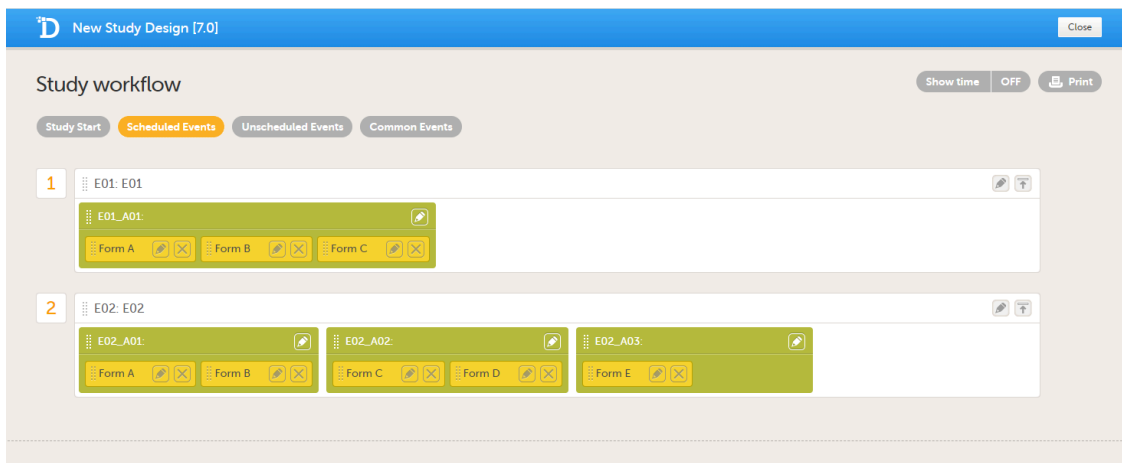
The forms in the PDF are sorted by these characteristics:

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:





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



Archiving a study

# Archiving a study

Published by Viedoc System 2021-11-24

## 1. Introduction

### 1.1 Prerequisite

## 2. Archiving the study

# 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 [Viedoc Clinic User Guide](#).

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 [Study start 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

The screenshot shows the export configuration interface. Under 'Type of data', the following options are checked: Signed data, Not Signed data, SDV performed or NA, and SDV pending. In the section 'In addition to data, also include the following in the export (will not be included in Preview data)', the following options are checked: Queries, Review status, Uploaded files, Query history, and Medical coding. Under 'Output format', 'Output to Excel' is selected, and the 'Output to:' dropdown is set to 'Microsoft Excel - Office Open XML'. The 'Data grouping' is set to 'Group data by form' and the 'Layout' is set to '1 row per activity'.

- 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

- CSV

- Include corresponding SAS script
- Queries, Query history, Review status, Medical coding, Uploaded files

- ODM

- Queries, Medical coding, Review status

- PDF

- Create PDF/A compliant archive

- Review status, Uploaded files

The screenshot displays the 'Type of data' configuration panel. At the top, there are tabs for 'Signed data', 'Not Signed data', 'SDV performed or NA', 'SDV pending', 'Review status', and 'Uploaded files'. Below the tabs, there are two rows of checkboxes: the first row has 'Signed data' and 'Not Signed data'; the second row has 'SDV performed or NA' and 'SDV pending'. A section titled 'In addition to data, also include the following in the export (will not be included in Preview data)' contains three checkboxes: 'Queries' (unchecked), 'Review status' (checked), and 'Uploaded files' (checked). Below this is the 'Output format' section, which has a dropdown menu set to 'Output to PDF'. Underneath, there is a dropdown menu for 'Output to:' with 'PDF - Pdf Archive' selected. Below the dropdown are four checkboxes: 'Exclude deleted subjects / events / forms' (unchecked), 'Create PDF/A compliant archive' (checked), 'Embed complete fonts (no subsets)' (unchecked), and 'FDA submission format (eCTD)' (unchecked).

The data export in Viedoc supports all file formats that are required for archiving and regulatory purposes, including these formats:

- Portable Document Format Archive ([PDF/A](#)) - an International Organization for Standardization ([ISO](#))-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 ([ODM](#)) - 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.



Managing Viedoc Me

# Managing Viedoc Me

Published by Viedoc System 2023-10-09

## [1. Introduction](#)

## [2. Activating the Viedoc Me account](#)

### [2.1 Quick access to Viedoc Me](#)

## [3. Verifying the subject's contact information](#)

## [4. Checking the status and subject activity](#)

### [4.1 Download log](#)

### [4.2 Viedoc Me account overview](#)

## [5. Locking and unlocking the Viedoc Me account](#)

## [6. Resetting the PIN code](#)

This lesson applies to site staff coordinating the Viedoc Me application.

## 1 Introduction

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 study start event 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

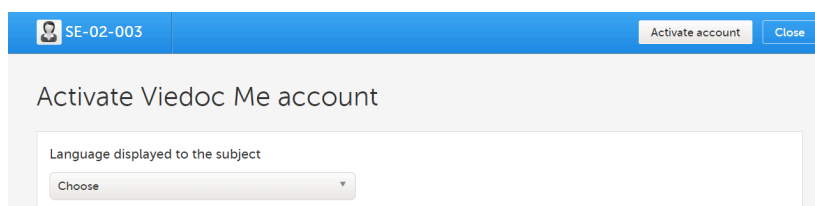
To activate the Viedoc Me account:

- 1 Select the phone icon located in the top right corner of the Details page:

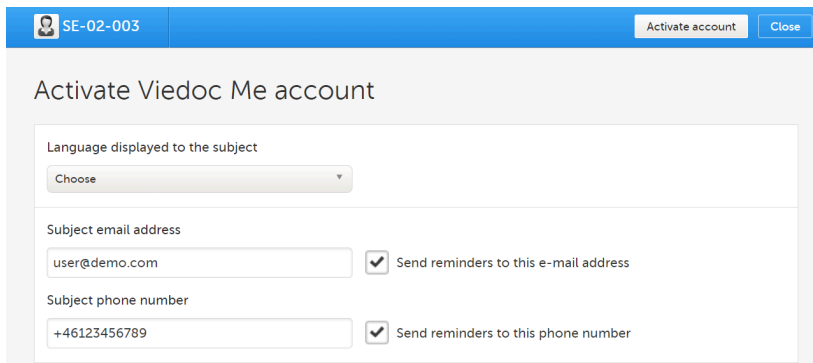


The **Activate Viedoc Me account** page opens.

- 2 Choose the language that should be displayed to the subject by selecting the language from the dropdown list:



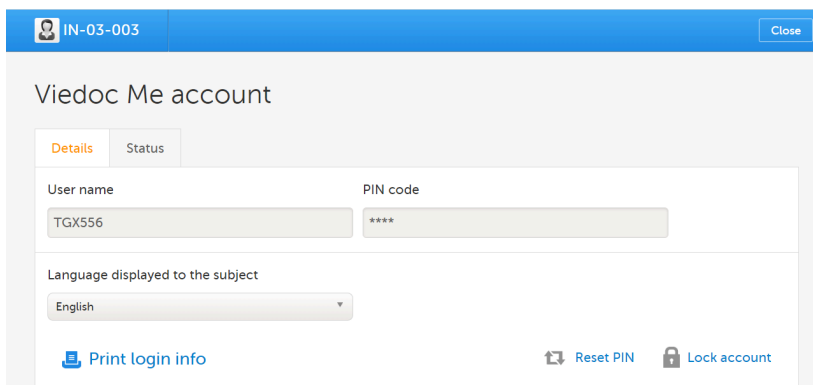
- 3 If the study has enabled the functionality for reminders, enter the email and/or cell phone number to the subject, including the country code, that is, in format +[CountryCodePhoneNumber] . Make sure to select the boxes **Send reminders to this e-mail address/phone number**:



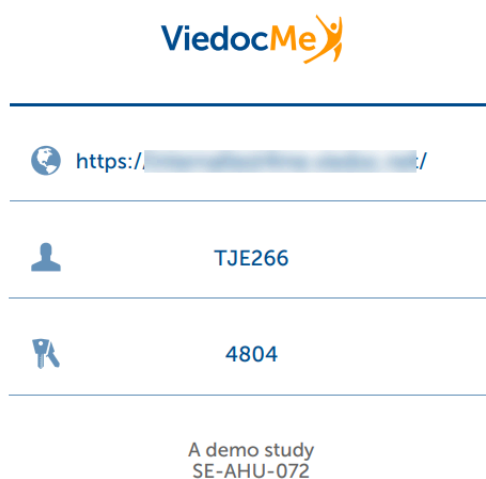
The reminder settings can be changed at any time after the Viedoc Me account activation.

Test messages can be sent out to the entered email address and/or phone number, see [Verifying subject email address and phone number](#).

- 4 Select **Activate account**. The user name and PIN code for the subject are automatically created by the system:

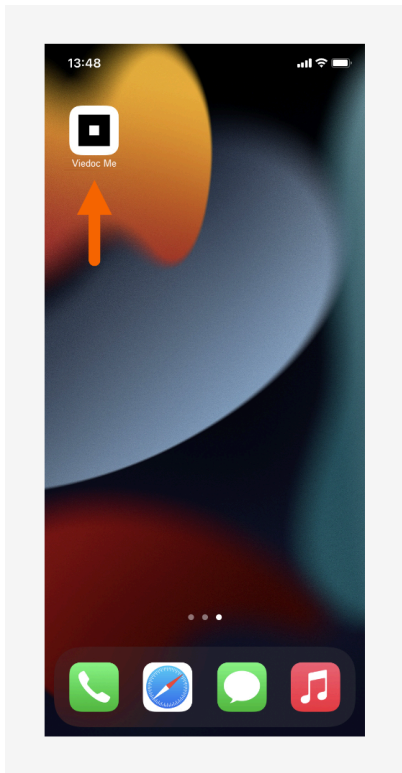


- 5 Select **Print login info** to print out a PDF with a link to the Viedoc Me application, user name, and PIN code. Make sure the subject receives this information.



## 2.1 Quick access to Viedoc Me

If the subject is 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 the subject.
- 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.

Similarly, the Viedoc Me URL can be saved as a bookmark/favorite on a computer.

---

### 3 Verifying the subject's contact information

If the study has reminders enabled, it is possible to send out a test email/text message to the subject's email address and/or phone number. Note that the test emails sent from Viedoc cannot be replied to.

To verify the contact information:

Select **Send test email** and/or **Send test text message** in the Viedoc Me account details page:

IN-03-003Close

### Viedoc Me account

DetailsStatus

User name

PIN code

Language displayed to the subject

Subject email address

  
Send test email

Subject phone number

  
Send test text message

Print login info Reset PIN Lock account

**Note!** The 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 page must be saved in order for the test links to be available.

The result of sending out the test email/text message is displayed by a message:

If the test message was **successfully** sent:

Subject email address

  
✔ Test email successfully sent! [Send again?](#)

You can send the test email/text message again by selecting **Send again** (for example, if the subject cannot confirm they have received the message).

If the test message **failed** to send:

Subject phone number

  
 Send reminders to this phone number

! We were not able to sent 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, save the changes, and try again.

## 4 Checking the status and subject activity

You can check the **Status** tab of the Viedoc Me account details page for status of incoming questionnaires and activity,

Here you can see how many times the subject has logged in, when last logged in, compliance, and when incoming questionnaires are expected:



## Viedoc Me account

Details	Status		
Number of logins	4	Last login: 07 Dec 2022 16:52	<a href="#">Download log</a>
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	08 Nov 2022 (-0/+2 days)	-	Missing
Visit 1 (Viedoc Me), Gastro Intestinal Tolerance Questionnaire	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\**
- *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.

**Note!** 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*
- Note!** **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  On ViedocMeLog-TPD838-20220302195241.xlsx - Excel Search (Alt+Q)

File Home Insert Page Layout Formulas Data Review View Help Acrobat

Clipboard Font Alignment Number Styles

Message ID	User name	Type of communication	Datetime (UTC)	Site type	Message Type	Status	Provider
f05d7f29-1df8-49e4-8d94-523981cf4101	TPD838	Sms	2022-03-02 09:40:05	Production	Subject Reminder	Success	Primary-Primary
97a223dc-39ae-49ad-b264-a1e384aa77a7	TPD838	Email	2022-03-02 09:40:04	Production	Subject Reminder	Success	Primary-Primary
2efe9360-8064-4cdd-8f63-7611e6be9ec6	TPD838	Sms	2022-03-02 09:30:05	Production	Subject Reminder	Success	Primary-Primary
4fd789dd-ca6c-4f9e-ad92-b3483f2dd878	TPD838	Email	2022-03-02 09:30:04	Production	Subject Reminder	Success	Primary-Primary
e2679b84-1895-4953-8638-beccb4ac4da5	TPD838	Sms	2022-03-02 09:15:04	Production	Subject Reminder	Success	Primary-Primary
92159bb7-2982-4d38-b512-d9dc329754a4	TPD838	Email	2022-03-02 09:15:03	Production	Subject Reminder	Success	Primary-Primary
dc23f734-c39b-43eb-a101-be358456b28b	TPD838	Sms	2022-03-02 09:10:57	Production	Contact Confirmation	Success	Primary-Primary
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:

Selection · Viedoc Me

Search FOUND 41 CARDS. Show all sites All accounts

ID	# LOGINS (LAST LOGIN)	COMPLIANCE	# MISSED EVENTS (LAST MISSED)	STUDY COMPLETION	NEXT SCHEDULED	ACCOUNT STATUS
IN-03-003 Site3	0	-	-	-	-	Initiated
IN-03-002 Site3	4 29 Jun 2023 11:11 CEST	33%	2/3 (13 Apr 2023 00:00 CEST)	75%		Open
IN-03-001 Site3	0	0%	3/3 (20 Jan 2023 00:00 CET)	75%		Initiated
NO-ST4-007 Site4	4 07 Dec 2022 16:52 CET	0%	1/1 (09 Nov 2022 00:00 CET)	100%	-	Open
SE-01-032 Site1	2 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
SE-01-019 Site1	1 02 Jul 2021 17:21 EEST	0%	3/3 (04 Jul 2021 00:00 EEST)	75%		Open
SE-01-018 Site1	1 21 Jun 2021 15:09 EEST	0%	3/3 (23 Jun 2021 00:00 EEST)	75%		Open
SE-01-017 Site1	2 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 [Views on the Selection page](#) in the lesson Selection page.

## 5 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 page:

The screenshot shows the 'Viedoc Me account' details page. At the top, there is a blue header with a user icon and the text 'IN-03-003' and a 'Close' button. Below the header, the page title is 'Viedoc Me account'. There are two tabs: 'Details' (selected) and 'Status'. The form contains the following fields and options:

- User name:** TGX556
- PIN code:** \*\*\*\*
- Language displayed to the subject:** English (dropdown menu)
- Subject email address:** \*\*\*\*, with a checked checkbox for 'Send reminders to this e-mail address' and a 'Send test email' link below it.
- Subject phone number:** \*\*\*\*, with a checked checkbox for 'Send reminders to this phone number' and a 'Send test text message' link below it.

At the bottom of the form, there are three buttons: 'Print login info', 'Reset PIN', and 'Lock account'. The 'Lock account' button is highlighted with a green box.

**Note!** 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 page. To unlock it, select the **Unlock account** link in the bottom-right corner:

This screenshot shows the 'Viedoc Me account' details page with the account locked. The layout is identical to the previous screenshot, but with the following changes:

- A red 'Account locked' icon with a lock symbol is displayed in the top-right corner of the main content area, highlighted with a green box.
- The 'Lock account' button is replaced by an 'Unlock account' button, which is highlighted with a green box.

## 6 Resetting the PIN code

The PIN code can be reset at any time by selecting **Reset PIN** in the Viedoc Me account details page:

This screenshot shows the 'Viedoc Me account' details page with the 'Reset PIN' button highlighted with a green box. The rest of the page content is the same as in the previous screenshots.

**Important!** The account must be unlocked before the new PIN can be used for login.



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 2023-10-09

## [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](#)

[3.1 Filling in a questionnaire of a scheduled event](#)

[3.2 Filling in a questionnaire of an unscheduled event](#)

### [4. Video calls](#)

### [5. Good to know](#)

[5.1 Reminders via email or text message](#)

[5.1.1 Setting reminders and changing your contact information](#)

[5.2 Changing your PIN code](#)

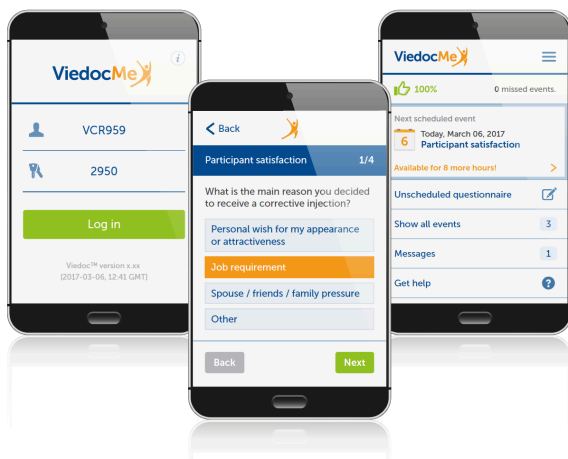
[5.3 Help](#)

[5.4 Log out](#)

[5.5 If you lose internet connection](#)

## 1 Introduction to Viedoc Me

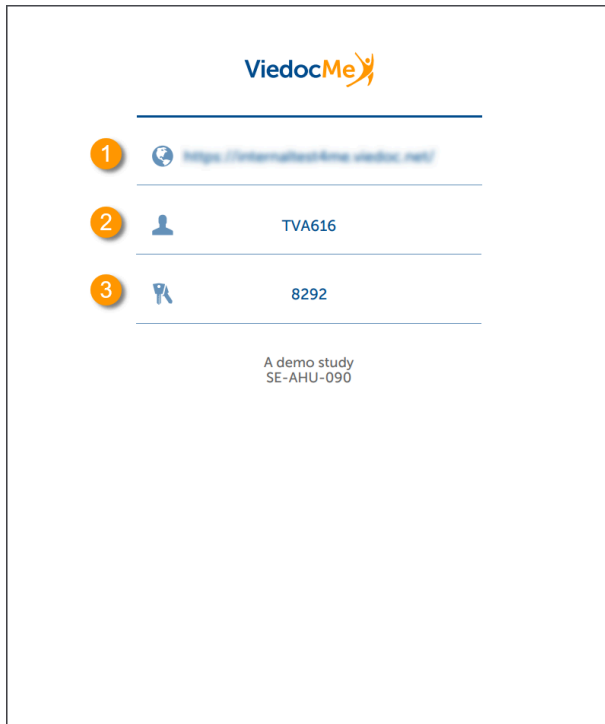
Viedoc Me is a web application used for collecting data from patients participating in clinical trials. It works on any device: a computer, tablet, or mobile phone, as long as the device has a browser and access to the Internet. The application enables you to fill in questionnaires and submit them.



## 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:



The document contains the following info:

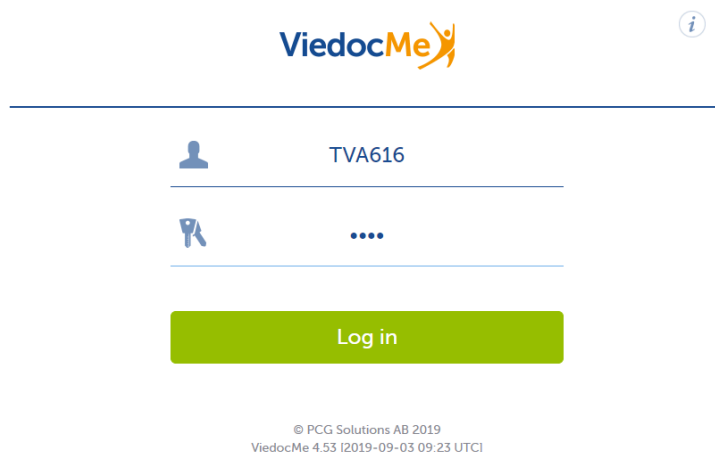
1. The URL (web address) to Viedoc Me.
2. Your user name. The user name consists of three characters followed by three numbers, for example *TVA616*.
3. Your PIN code. The PIN code consists of four numbers.

## 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.

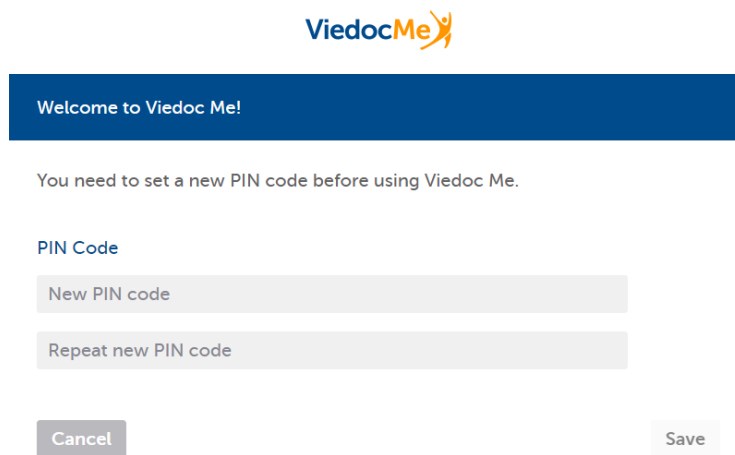
The Viedoc Me login page opens.



- 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

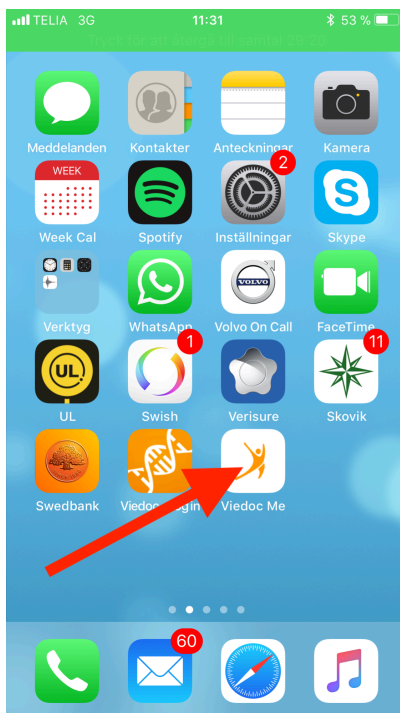
Repeat new PIN code

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.

Similarly, you can save the Viedoc Me URL as a bookmark/favorite on your computer.

## 3 Events

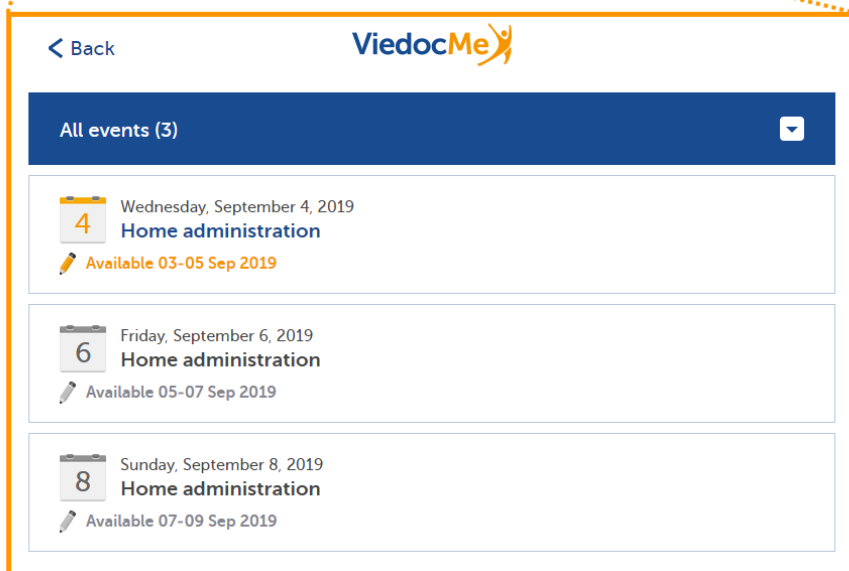
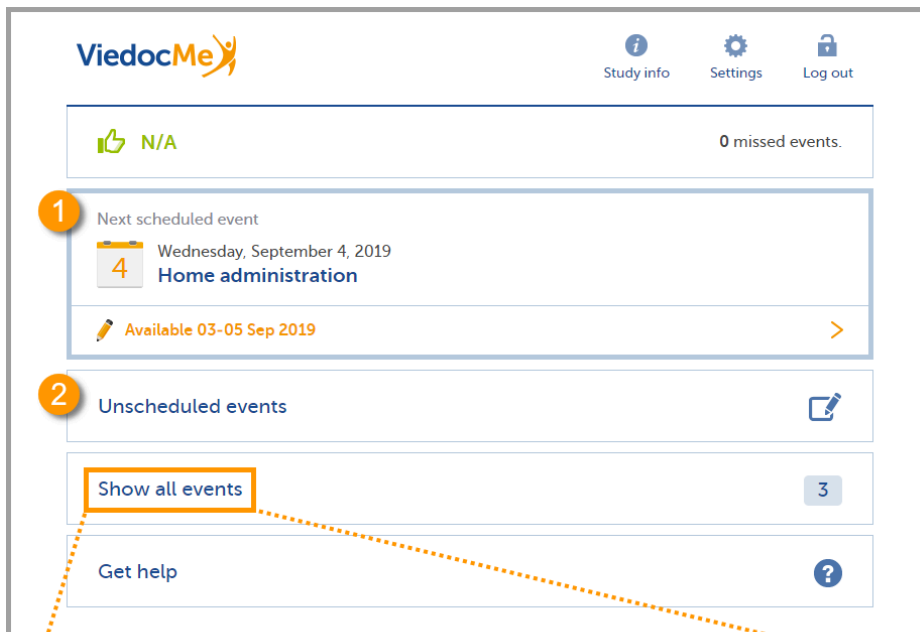
There are two types of events:

### 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.



**Note!** The names of the questionnaires differ depending on the study. The above image is just an example!

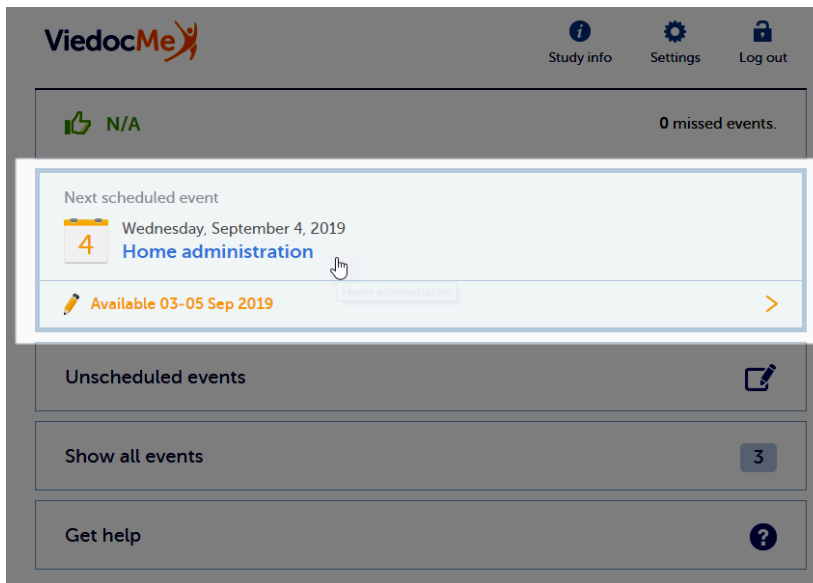
### 3.1 Filling in a questionnaire of a scheduled event

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.



- 1 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.



The questionnaire opens.

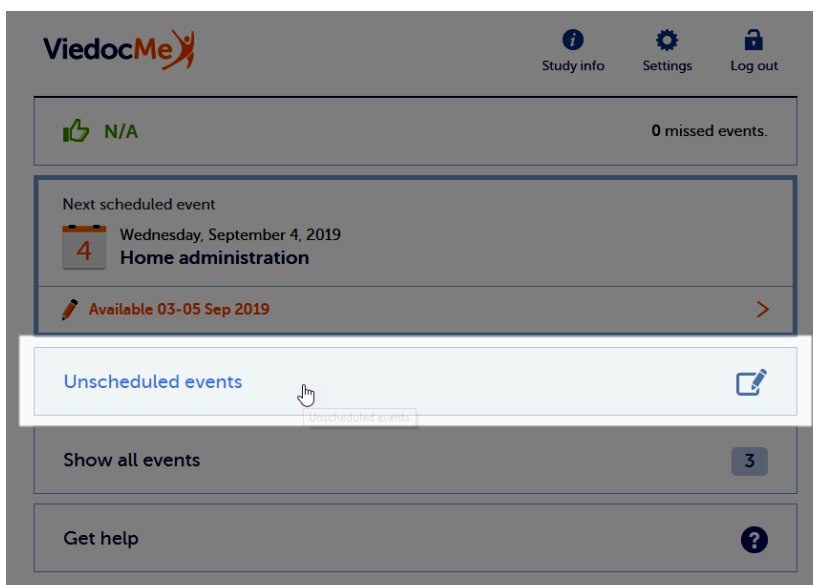
- 2 Enter your answers to the questions. If there are multiple pages, you can navigate to the previous page by selecting **Back**, or to the next page by selecting **Next** (only if you have provided an answer to the question).
- 3 When you have answered the last question, select **Send** to submit the 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

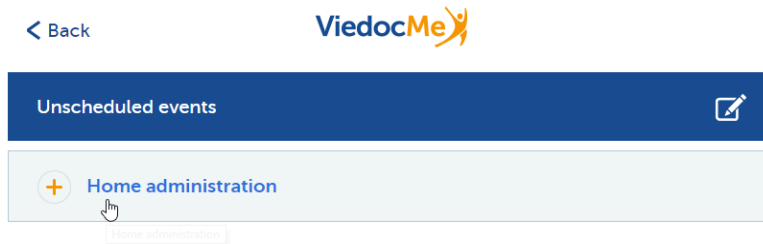
If the study allows, you might be able to spontaneously report data at any time.

To fill in a questionnaire of an unscheduled event:

- 1 Select **Unscheduled events**.



- 2 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.



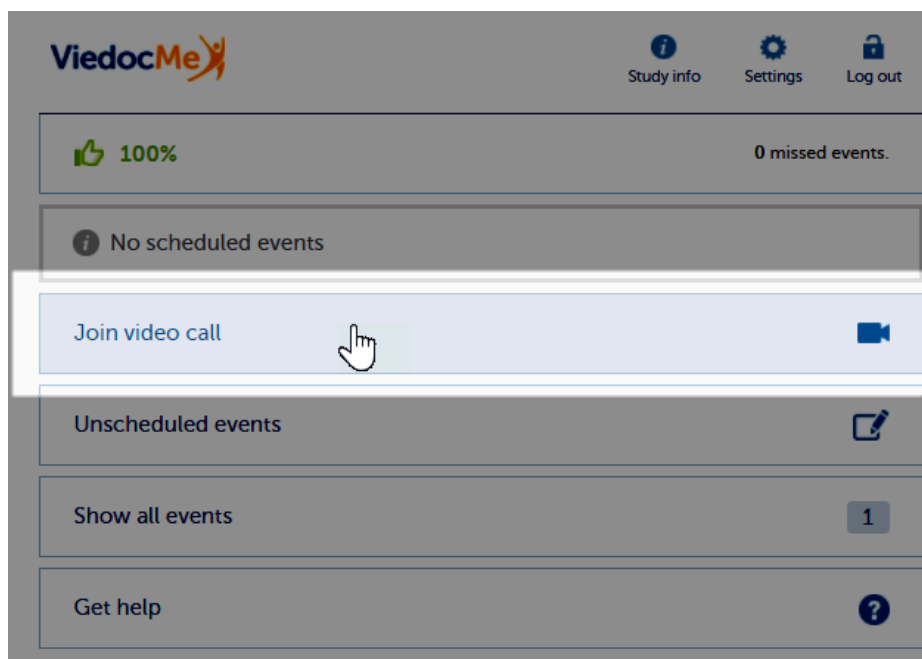
The questionnaire opens.

- 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.

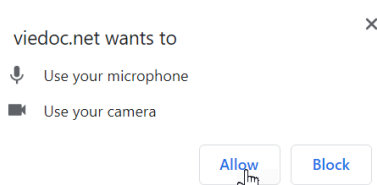
## 4 Video calls

The Viedoc Connect application allows the clinic staff to initiate a video call with you.

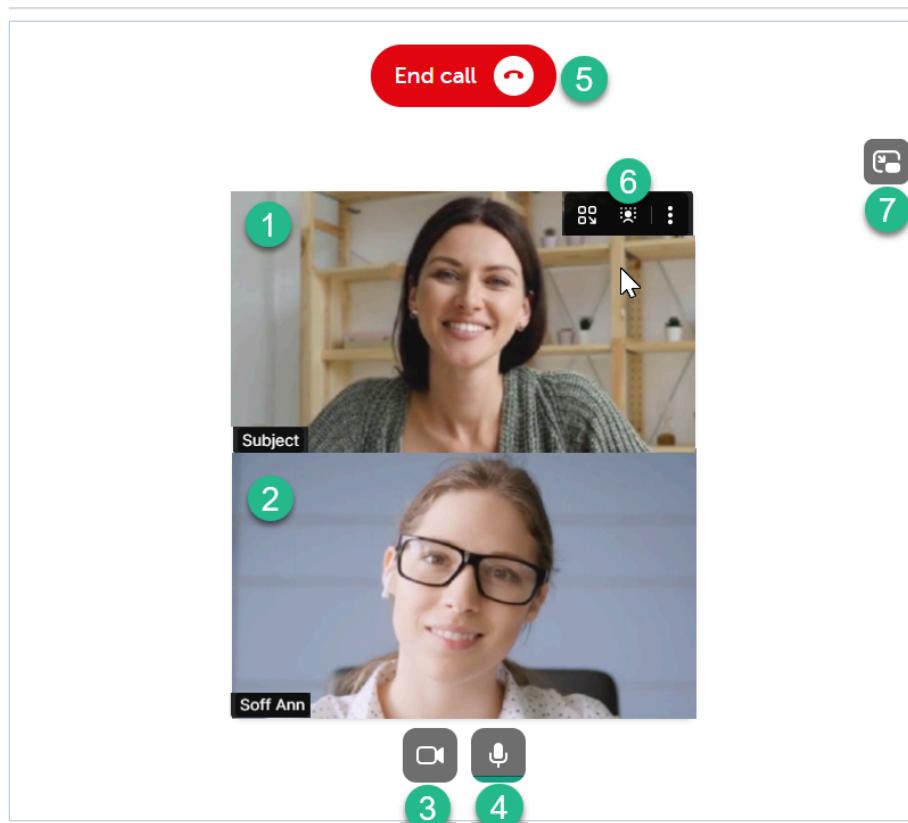
When your doctor has initiated a call, the video call module in Viedoc Me flashes in blue with the text **Join video call**. Select anywhere on the module to join the call.



**Note!** It's important to allow your web browser to access your camera and microphone, if prompted:



During the call, you will see the following screen:



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 removable 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

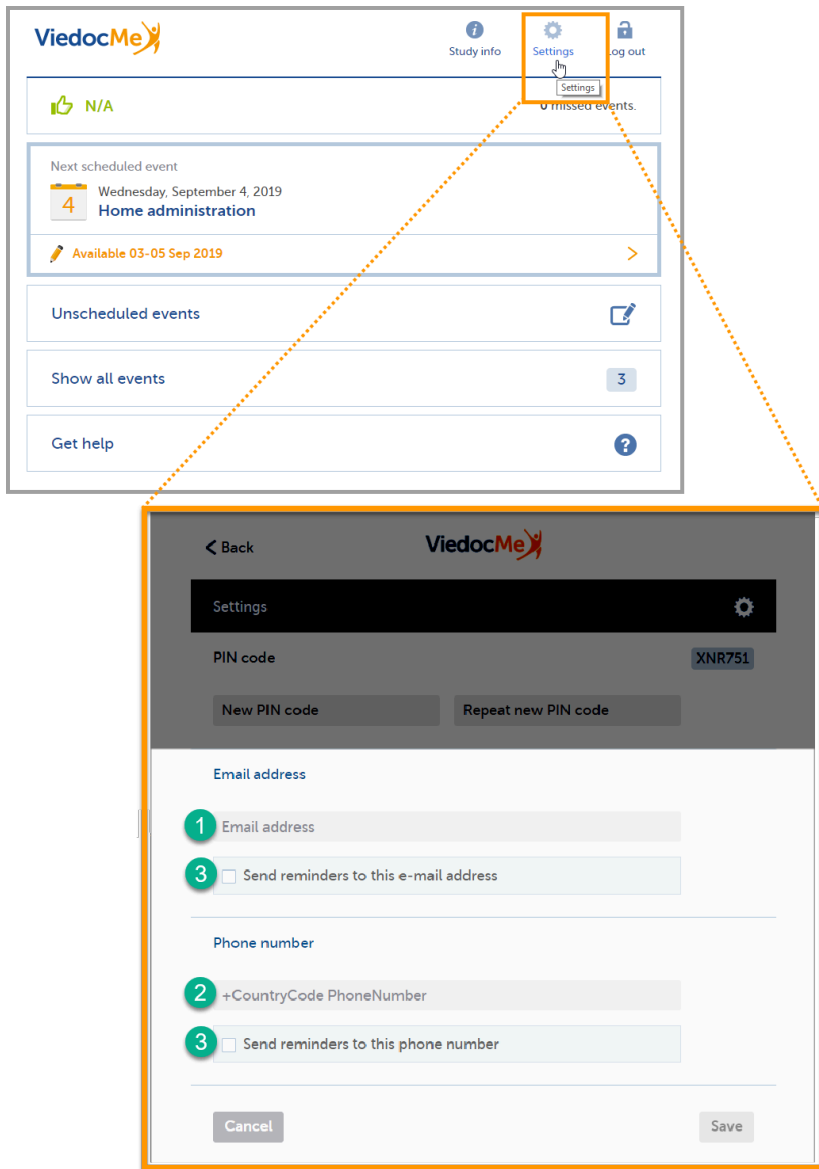
The Viedoc Me application can send reminders to remind you of upcoming scheduled events. These reminders are configured by the study staff at the clinic and can be sent as an email and/or a text message (sms). Note that you cannot reply to emails sent from Viedoc.

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 Select **Settings** and enter a new email address (1) and/or phone number (2). Make sure to include the country code in format `+CountryCodePhoneNumber` .



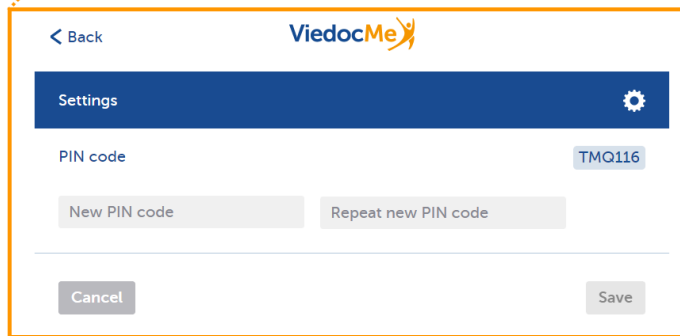
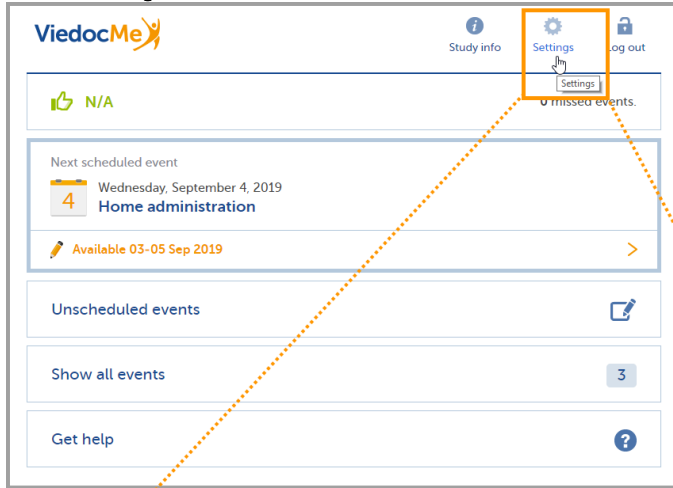
- 2 Check the box(es) (3) to allow Viedoc to send reminders to the email and/or phone.
- 3 Select **Save** to save the changes.

## 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**.



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.

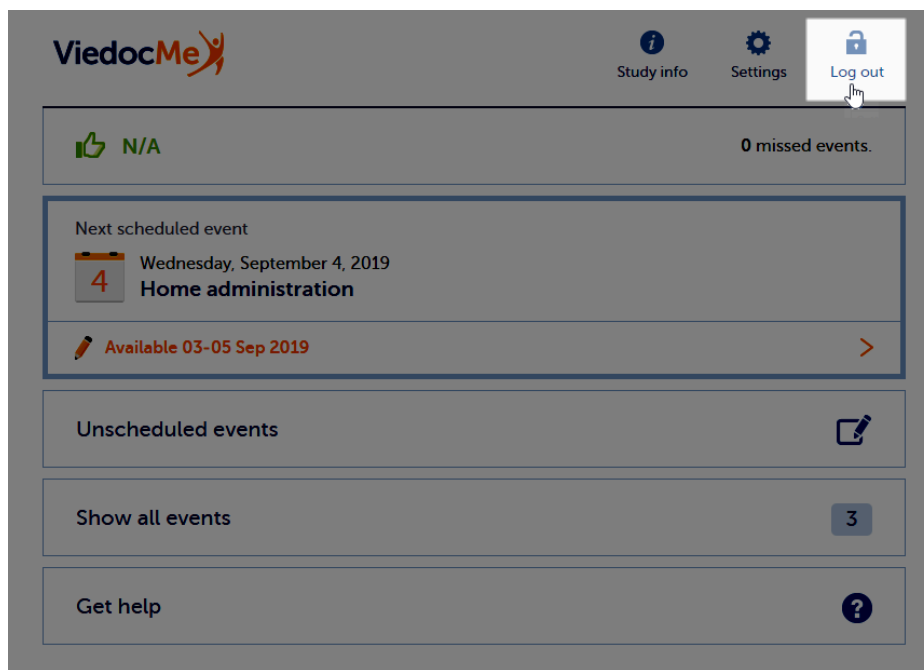
### 5.3 Help

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.



## 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 2023-10-09

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## 1 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.

The application helps you fill in questionnaires and submit them, keep track of events, or connect with a physician through **Viedoc Connect**.

viedoc me

Welcome. Great to see you here.

Username  
TEP326

PIN code  
••••

Log in

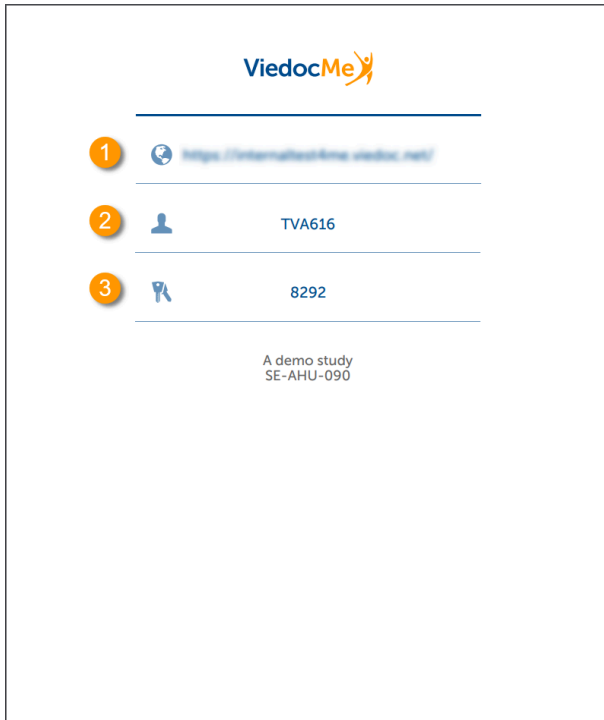
viedoc

© Viedoc Technologies AB 2023  
Viedoc Me 4.77 [2023-08-30 10:05]

## 2 Access to Viedoc Me

### 2.1 Document with login details

Access to Viedoc Me is provided by your physician, nurse, or other contact at the clinic. You will be provided with a document that looks as follows:



The document contains the following information:

1. The URL (web address) to Viedoc Me.
2. Your user name. The user name consists of three characters followed by three numbers (*TVA616*, for example).
3. Your PIN code. The PIN code consists of four numbers.

### 2.2 Logging 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.

viedoc me

Welcome. Great to see  
you here.

Username  
TEP326

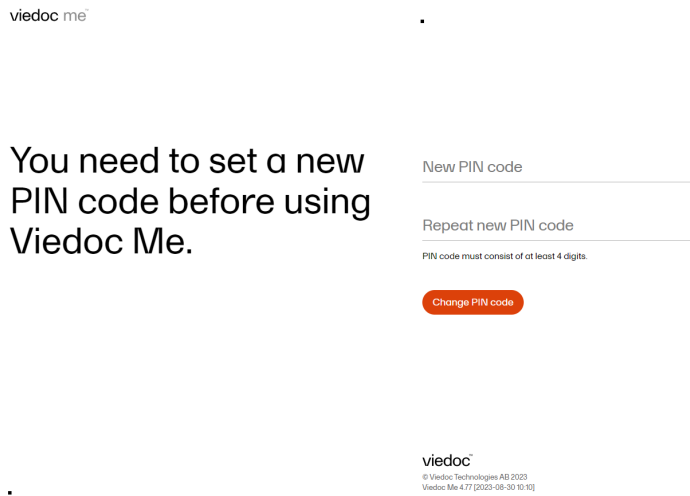
PIN code  
••••

Log in



- 2 Enter your user name.
- 3 Enter your PIN code.
- 4 Select **Log in**

**Note!** When you log in for the first time, there might be a prompt to change your PIN code:



## 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. 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**

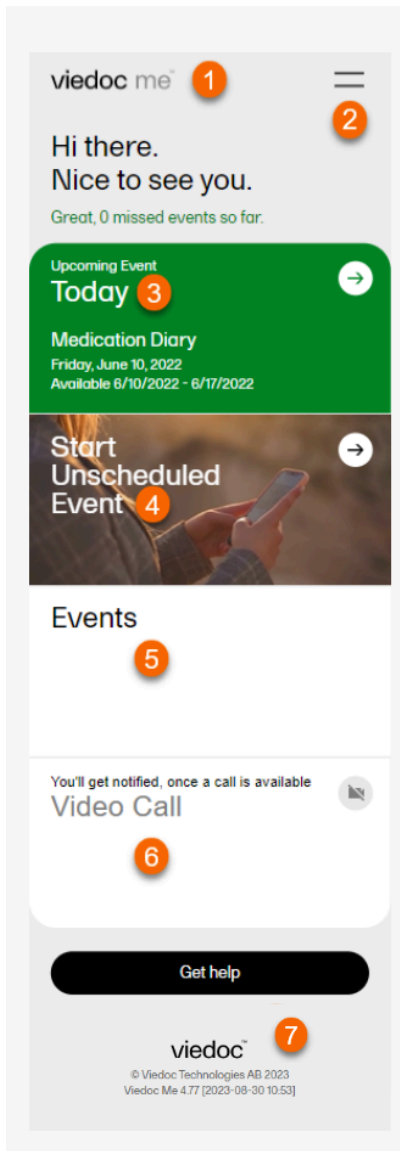
The Viedoc Me application is now available to select on your device.

Similarly, you can select the Viedoc Me URL and add it to the Favorites menu on your computer.

---

## 3 Start screen

After 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.

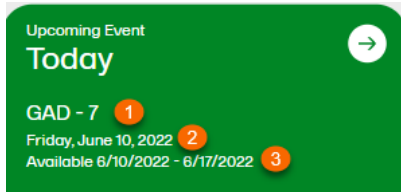
7. The **get help button** - select for information on how to contact clinical staff.

---

## 4 Events

### 4.1 Upcoming event

In **Upcoming Event**, you will see the next events that your study has scheduled for you.



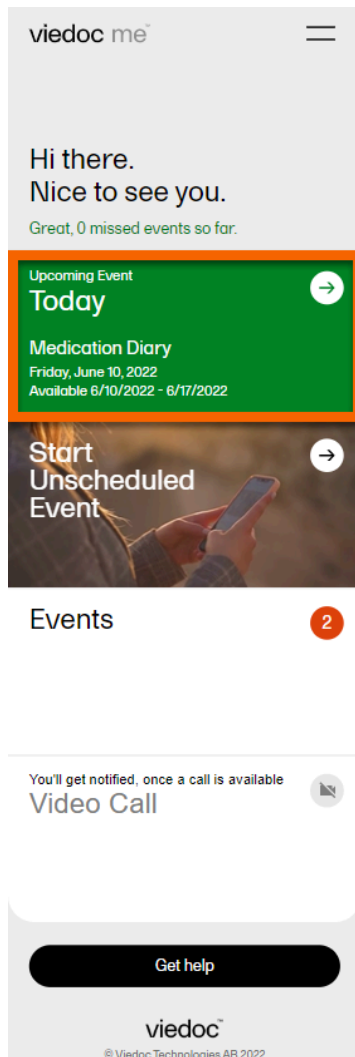
1. The title of the event.
2. The date the event is to be started.
3. The dates of availability for the event.

### 4.2 Filling in an event

To fill in a scheduled event:

**Note!** You can only fill in an event during the availability period.

- 1 Select the **Upcoming Event** tile.



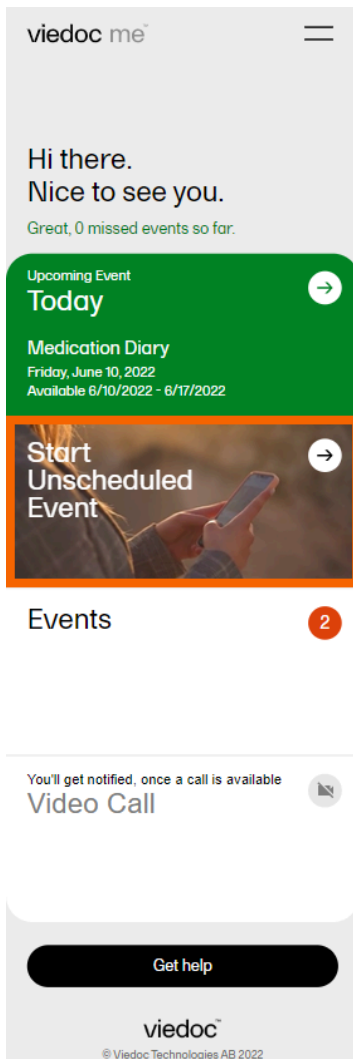
- 2 Select your answer to the questions. If there are multiple pages, you can navigate by using the arrow buttons.
- 3 Complete the event and then select **Submit**.  
**Note!** Before you select **Submit**, you will be prompted to ensure your answers are set. You can select the back arrow button if 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

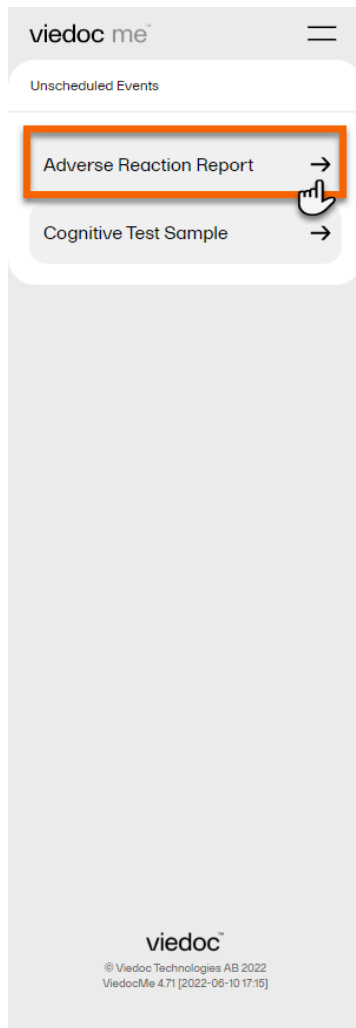
If the study allows for it, you will be able to report data at any time.

To fill in an unscheduled event:

1 Select **Start Unscheduled Event**.



- 2 Select the name of the event.



**Note!** 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.
- 4 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.

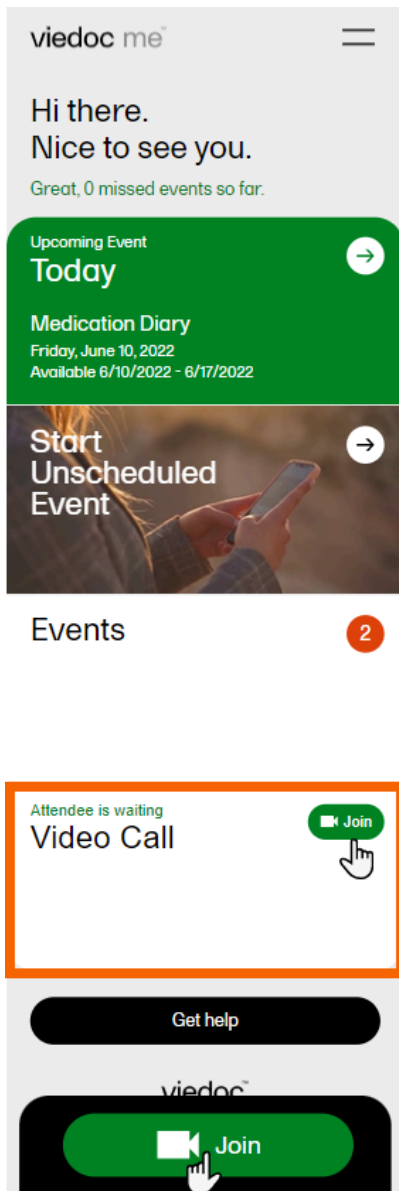
---

## 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.

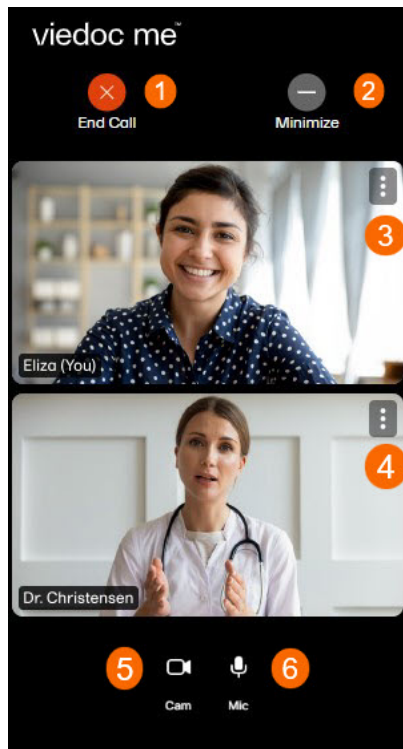
Select **Join** anywhere in the app to join the call. Alternatively, you can select the **Video Call** tile to join a call.



**Note!** 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 Expanded functions

### 6.1 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.

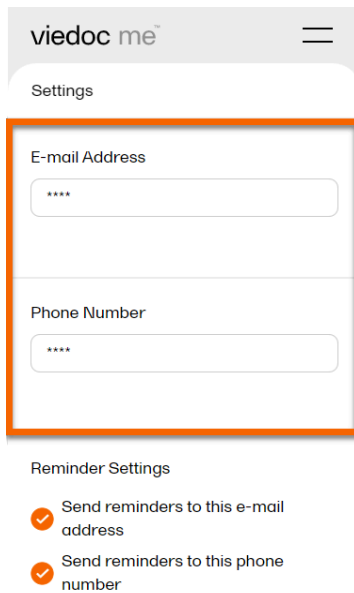
#### 6.1.1 Setting reminders and changing your contact information

Change your contact information and reminder settings in the application when available:

- 1 **Select** the menu symbol on the start page.
- 2 **Select** settings.



- 3 Enter your updated email address and phone number.



The screenshot shows the 'Settings' page of the 'viedoc me' app. The 'E-mail Address' and 'Phone Number' fields are highlighted with an orange border. Below them, the 'Reminder Settings' section shows two checked options: 'Send reminders to this e-mail address' and 'Send reminders to this phone number'.

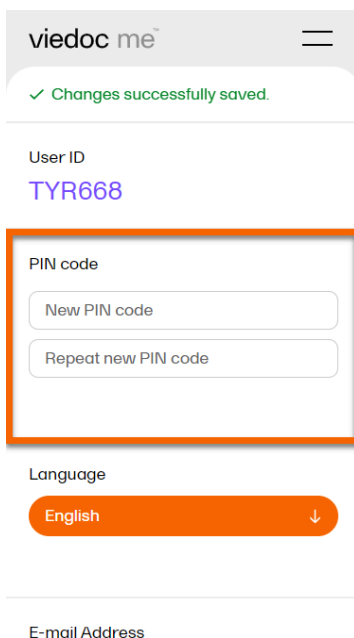
- 4 Select **Save Changes** and your information will be updated.

## 6.2 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**.



The screenshot shows the 'Settings' page of the 'viedoc me' app. A green message 'Changes successfully saved.' is visible at the top. The 'PIN code' section is highlighted with an orange border, showing two input fields: 'New PIN code' and 'Repeat new PIN code'. Below this, the 'Language' section shows 'English' with a dropdown arrow.

- 3 Select **Save Changes** and your PIN code will be updated.

## 6.3 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 create a new document for you with new login details.

## 6.4 Log out

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 2023-10-09

## [1. Introduction](#)

### [1.1 Prerequisites](#)

## [2. Opening Viedoc Connect](#)

### [3. Initiating a call](#)

### [4. Troubleshooting](#)

## 1 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 it is possible for subjects to join the video call through the Connect module available in Viedoc Me.

A started video call 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.

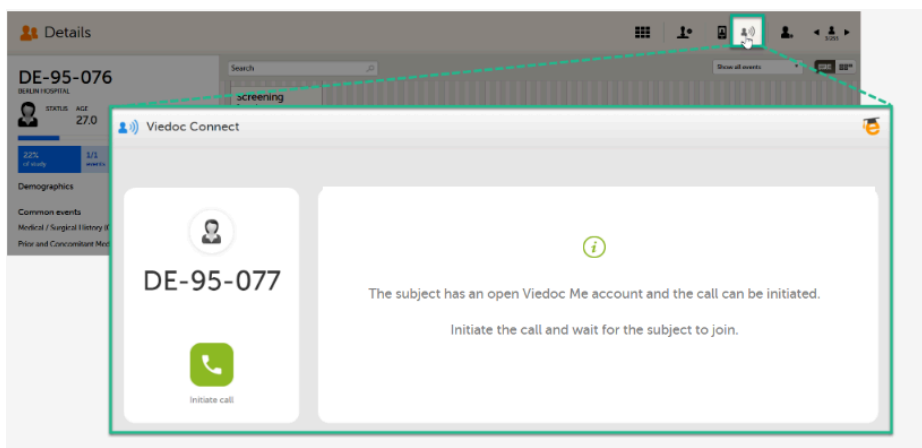
### 1.1 Prerequisites

To use Viedoc Connect:

- the feature must be included in the study license
- the feature must be enabled in Viedoc Admin
- the subject must have an open Viedoc Me account

## 2 Opening Viedoc Connect

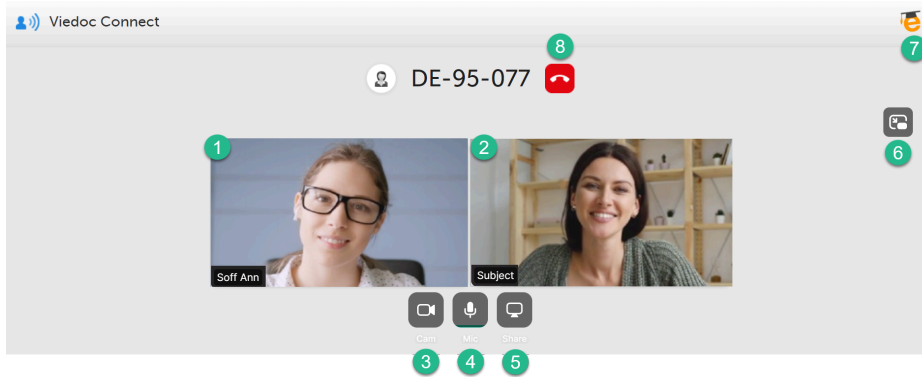
To open Viedoc Connect, click the icon on the Selection page. Viedoc Connect opens in a new tab:



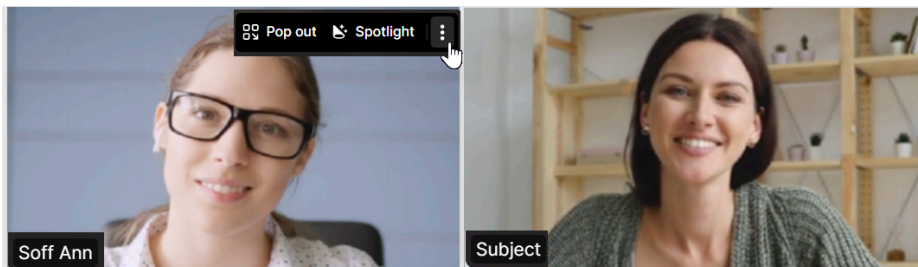
### 3 Initiating a call

To initiate a call, click the **green** phone icon.

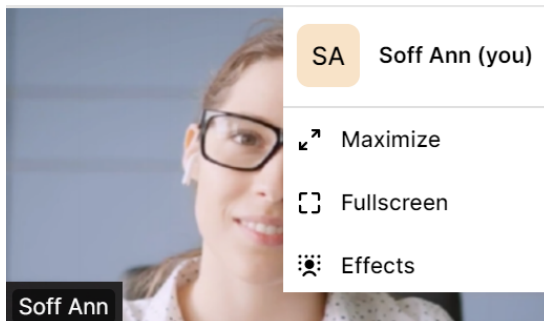
When the subject joins the call, you will see the following view:



1. The site user screen (you) - hover over the screen to show the screen settings.



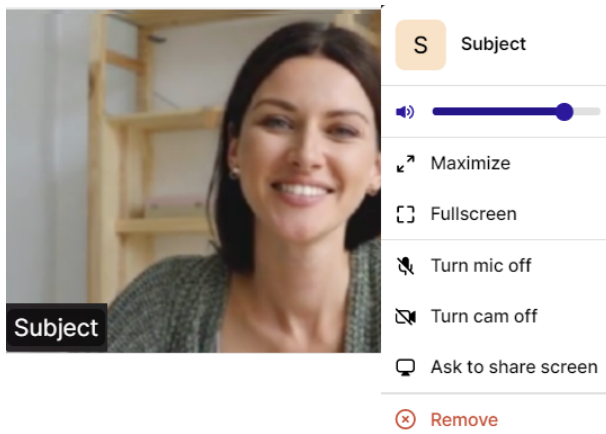
- Click **Pop out** to move the screen of you to the bottom right corner.
- Click **Spotlight** to put the spotlight on you.
- Click the three dots to show more settings:



- Click your name to change it.
- Click **Maximize** to make both screens larger.
- Click **Fullscreen** to make your screen cover the whole screen.
- Click **Effects** to open a menu of more settings.

2. The subject's screen - hover over the screen to show the screen settings.

- Click **Spotlight** to put the spotlight on the subject.
- Click the three dots to show more settings:



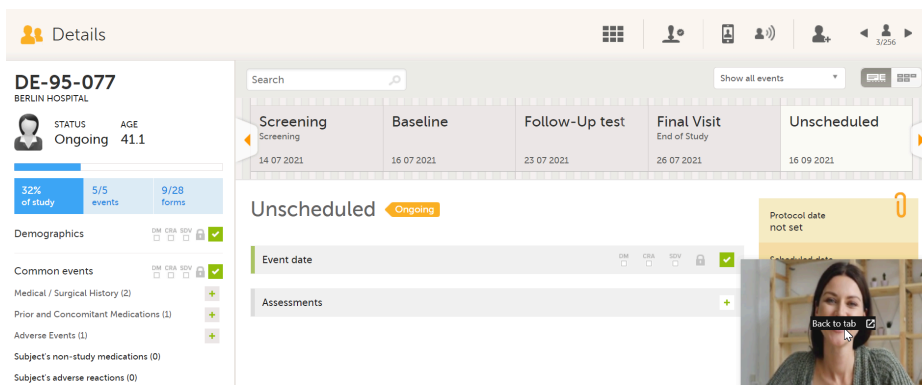
- Pull the bar to increase/decrease their volume.
- Click **Maximize** to make both screens larger.
- Click **Fullscreen** to make their screen cover the whole screen.
- Click **Turn mic off**/**Turn cam off** to disable their microphone/camera. To enable them, click **Ask to turn mic on**/**Ask to turn cam on**. The participant will be notified and needs to enable their mic/cam.
- Click **Ask to share screen**. The participant will be notified to share their screen.
- Click **Remove** to end the call with the participant.

3. Camera settings - click to turn off the camera. Hover to see more camera settings.

4. Microphone settings - click to mute. Hover to see more microphone settings.

5. Screen settings - click to share your screen.

6. Picture-in-picture - click to continue the video call with a removable screen that will be shown even if you switch tab. Hover over the mini-screen and click **Back to tab** to return to the Viedoc Connect main screen.



7. eLearning - click to open this lesson whenever you need help with Viedoc Connect.


8. End call button - click to end the call.


## 4 Troubleshooting

When launching Viedoc Connect, your browser may notify you to enable your microphone and camera.

Ensure to allow access:

viedoc.net wants to

 Use your microphone

 Use your camera

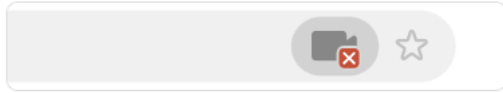
Allow

Block

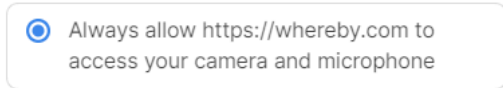
If you don't allow access, you will be prompted again:

**It seems your browser is blocked from accessing your camera and microphone.**

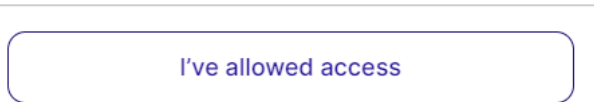
- 1 Click the camera icon in the far right of the URL bar.



- 2 Select 'Always allow' followed by 'Done'.



- 3 Finally, click the 'Try Again after allowing access' button below.



Follow the instructions and click **I've allowed access** to enter Viedoc Connect.



Site User training video

## Site User training

Published by Viedoc System 2022-05-06

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This video is an introduction to Viedoc Clinic for the Site User.

If you have difficulties in viewing the video, click [here](#).



Create a user account

## Create a user account

Published by Viedoc System 2018-11-12

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This video walks you through the process of creating a Viedoc user account.

If you have difficulties in viewing this video click [here](#).





Log in/Log out and reset password

## Log in/Log out and reset password

Published by Viedoc System 2019-11-14

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This video shows how to log in/log out to/from Viedoc and how to reset your password.

If you have difficulties in viewing the video, click [here](#).



Landing page

## Landing page

Published by Viedoc System 2018-11-07

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This video provides a quick overview of the landing page as well as of the study start page.

If you have difficulties in viewing this video, click [here](#).



Add and select subjects

## Add and select subjects

Published by Viedoc System 2018-11-07

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This video provides a quick overview of the subjects **Selection** page and shows how to add new subjects.

If you have difficulties in viewing this video, click [here](#).



Initiate and add visits

## Initiate and add visits

Published by Viedoc System 2018-11-07

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This video demonstrates how to initiate a visit in Viedoc, as well as how to add an unscheduled visit.

If you have difficulties in viewing this video, click [here](#).



Enter data

## Enter data

Published by Viedoc System 2018-11-07

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This video demonstrates how to enter data in Viedoc, including filling in various data types and confirming data as missing.

If you have difficulties in viewing this video, click [here](#).



Sign data

## Sign data

Published by Viedoc System 2018-11-07

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This video demonstrates how data can be signed by the Investigator, using the signing console.

If you have difficulties in viewing this video, click [here](#).



Issues: Resolve a query

## Issues: Resolve a query

Published by Viedoc System 2018-11-07

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This video demonstrates how to resolve a query in Viedoc.

If you have difficulties in viewing this video, click [here](#).



Activate demo mode

## Activate demo mode

Published by Viedoc System 2018-11-07

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This video demonstrates how to switch between demo and production mode within a study.

If you have difficulties in viewing this video, click [here](#).





Enter reference data

## Enter reference data

Published by Viedoc System 2019-01-07

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This video demonstrates how to enter reference data in Viedoc Clinic.

If you have difficulties in viewing the video, click [here](#).

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