

## Viedoc User Guide for Medical Coders

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Overview of Viedoc Clinic

# Overview of Viedoc Clinic

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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 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](#)

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## 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

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](#)
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- [4. Pending invitations](#)
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  - [4.2 Rejecting a study invitation](#)
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## 1 Introduction

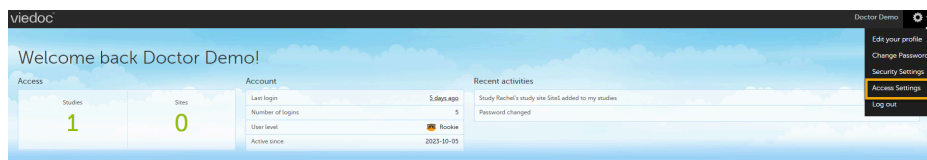
All information related to managing your Viedoc account can be found in the following user guide: [Viedoc User Account Management](#)

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:

## 2 Study access management

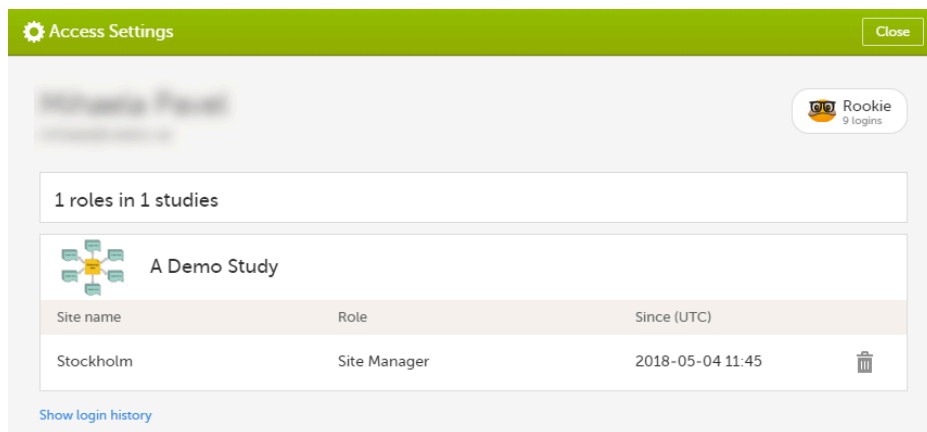
From the settings button (wheel) you can perform all actions related to study access management in **Access Settings**.



### 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](#))

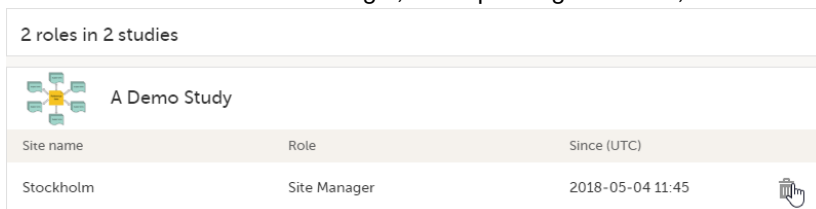
For users with organization roles, these are listed in the top of the page, in a separate section, providing the following information:

- **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:

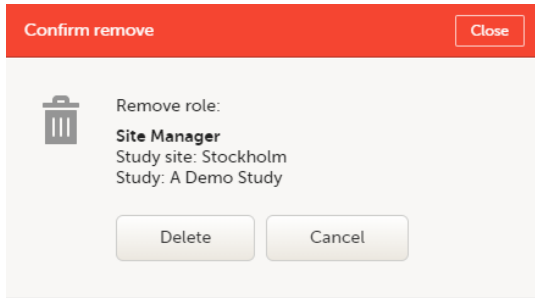
- 1 Select the trash can icon on the right, corresponding to the role, site and study to be removed from:



A confirmation dialog is displayed.



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



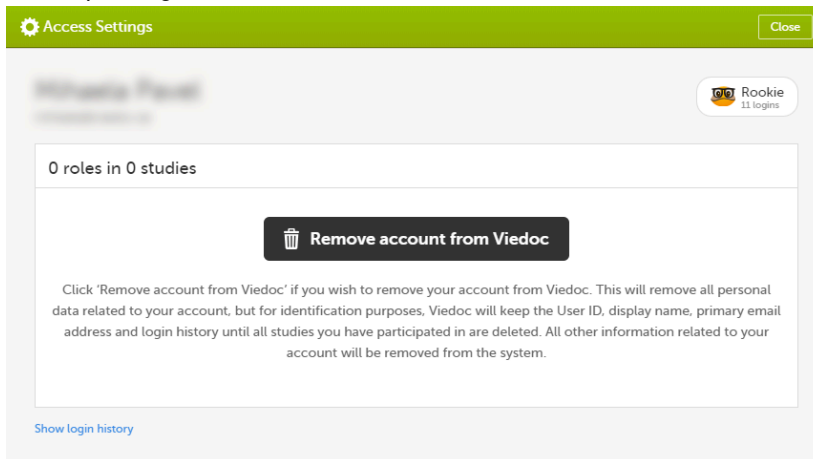
A notification email will be sent to all the Study managers, or to the Site managers if any roles are delegated.

### 3.3 Deleting your Viedoc account

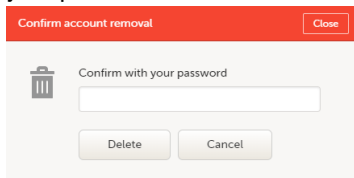
You can remove your Viedoc account when you have no study memberships left, that is, 0 roles in 0 studies.

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:



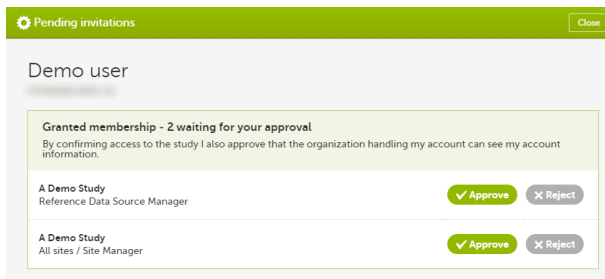
**Thank you and goodbye!**

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.

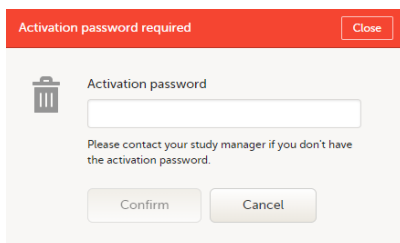
## 4 Pending invitations

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

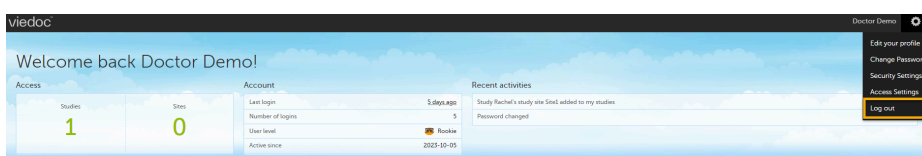
To postpone the approval or rejection of study invitations, select **Close** in the top right corner of the **Pending invitations** dialog box and postpone providing an answer to the study invitation.

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

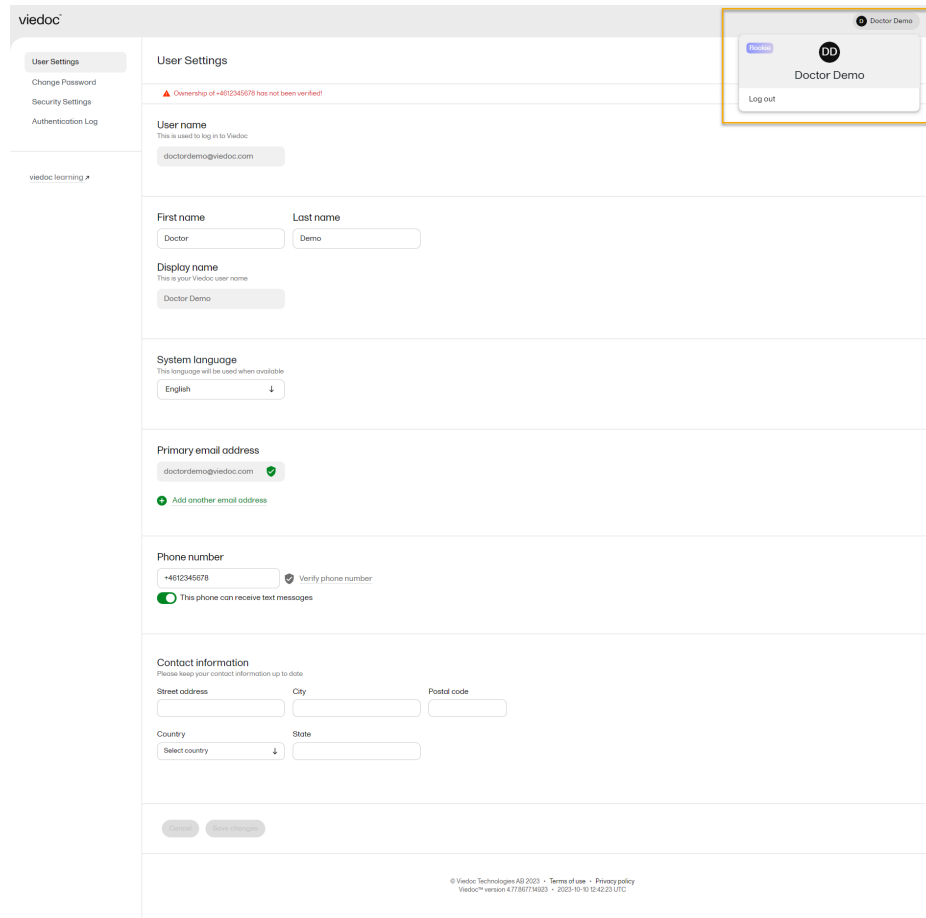
From Viedoc you can log out from different locations:



- 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 'User Settings' page in the Viedoc application. The page is divided into a left sidebar and a main content area. The sidebar contains navigation links for 'User Settings', 'Change Password', 'Security Settings', and 'Authentication Log'. The main content area is titled 'User Settings' and contains several sections: a warning message about ownership verification, 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 a checkmark and 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 of the page, there are 'Cancel' and 'Save changes' buttons. A callout box in the top right corner highlights the user profile menu, which includes a 'Profile' button, a circular avatar with the initials 'DD', the name 'Doctor Demo', and a 'Log out' button.

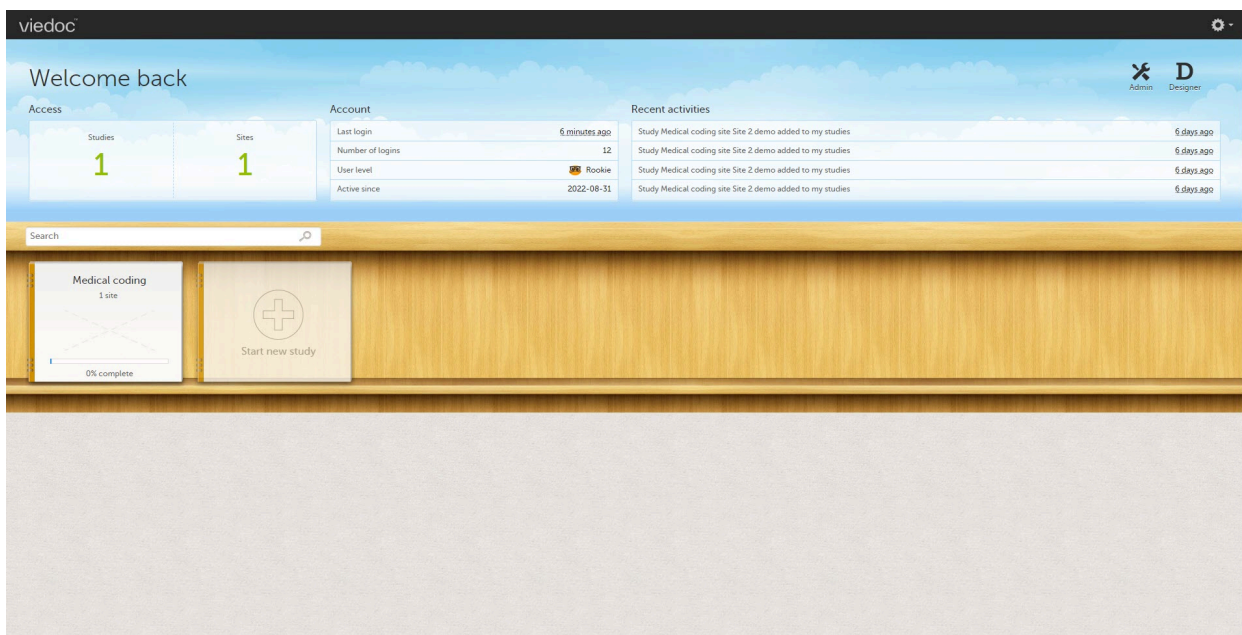


Overview of the landing page

# 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:

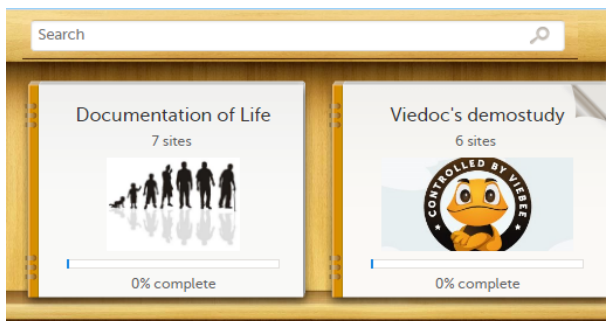
- **Access**
  - **Studies** - the total number of studies you have access to
  - **Sites** - the total number of sites you have access to
- **Account**
  - **Last login** - the time passed since the last time you have logged in to Viedoc
  - **Number of logins** - the total numbers of logins to Viedoc 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

Skill level	Icon	Description
Pro		101-1000 logins
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:

# Welcome back

**D**  
Admin Designer

### Access

Studies	Sites
<b>1</b>	<b>1</b>

### Account

Last login	6 minutes ago
Number of logins	12
User level	Rookie
Active since	2022-08-31

### Recent activities

Study Medical coding site Site 2 demo added to my studies	6 days ago
Study Medical coding site Site 2 demo added to my studies	6 days ago
Study Medical coding site Site 2 demo added to my studies	6 days ago
Study Medical coding site Site 2 demo added to my studies	6 days ago

Search

Medical coding  
1 site

0% complete

Start new study



Study start page

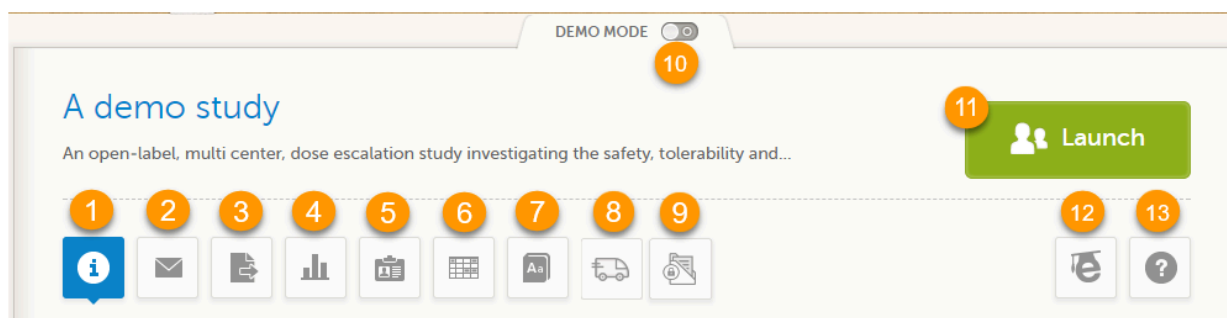
# Study start page

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](#)
- [9. Viedoc Logistics](#)
- [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](#)
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- [10. Demo mode](#)

11. [Launch](#)

12. [eLearning / Documentation & Training](#)

13. [Support](#)

### 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:

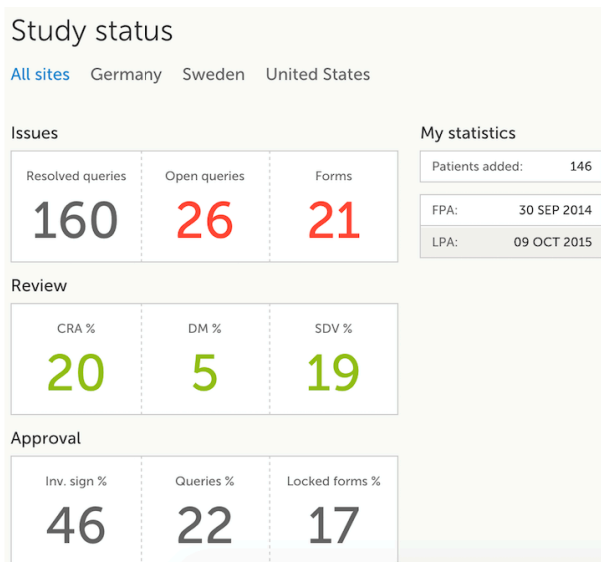
- If you have mandatory documentation pending to be read and signed, then the first page that opens is the [Documentation & Training](#).

**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.

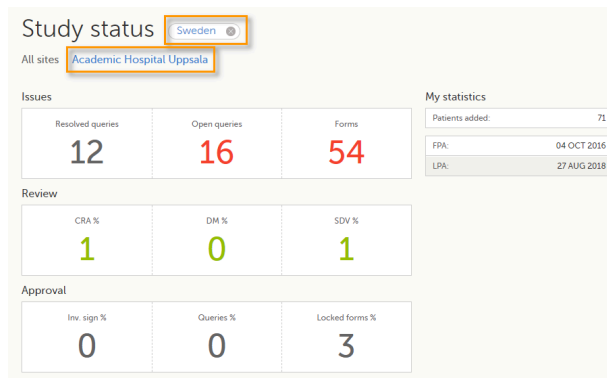
## 2 Study status

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):

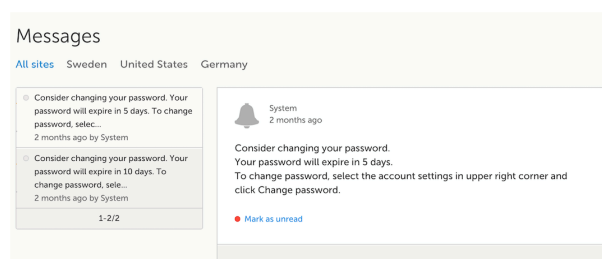
- **Issues**
  - **Resolved queries** - total number of resolved queries
  - **Open queries** - total number of open queries
  - **Forms** - total number of forms with issues
- **Review**
  - **CRA %** - percentage of forms that were marked as Clinical Research Associate ([CRA](#)) reviewed out of total 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](#).

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## 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](#).

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## 6 Roles

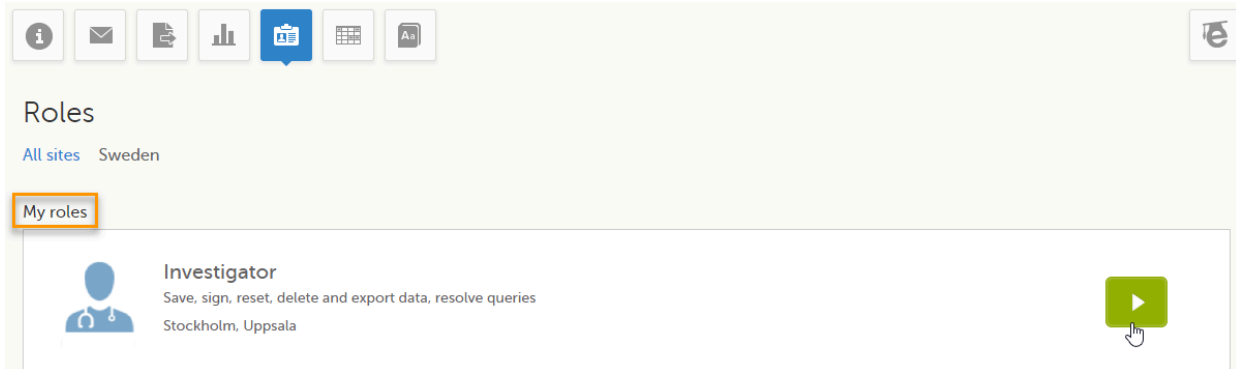
**Note!** The Roles page is only available for users with special permission to view roles, as per the study design.

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

User/Site	Access granted	Access revoked	Data edits/Sessions
<div style="display: flex; align-items: center; justify-content: space-between;"> <div style="display: flex; align-items: center;"> <div> <p>2 Investigator(s)</p> </div> </div> <div style="text-align: right;"> <a href="#">Hide log</a> </div> </div>			
Mihaela Pavel (362), <a href="#">[redacted]</a> Group: All sites	2018-04-05 12:22 UTC Doctor Demo	-	0 0
Doctor Demo (317), <a href="#">[redacted]</a> Multiple sites	2017-08-11 12:37 UTC Doctor Demo	-	143 77
<div style="display: flex; align-items: center; justify-content: space-between;"> <div style="display: flex; align-items: center;"> <div> <p>1 Monitor(s)</p> </div> </div> <div style="text-align: right;"> <a href="#">Show log</a> </div> </div>			
<div style="display: flex; align-items: center; justify-content: space-between;"> <div style="display: flex; align-items: center;"> <div> <p>1 Data Manager(s)</p> </div> </div> <div style="text-align: right;"> <a href="#">Show log</a> </div> </div>			
<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:

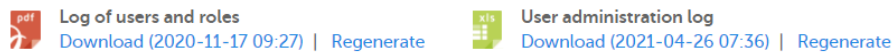
- [Log of users and roles in PDF format](#)
- [User administration log in Excel format](#)

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

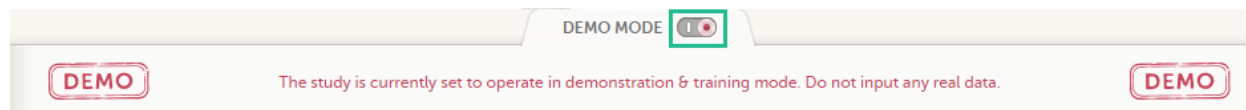
Viedoc eTMF is a digital repository for capturing, managing, sharing, and storing essential documents.

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

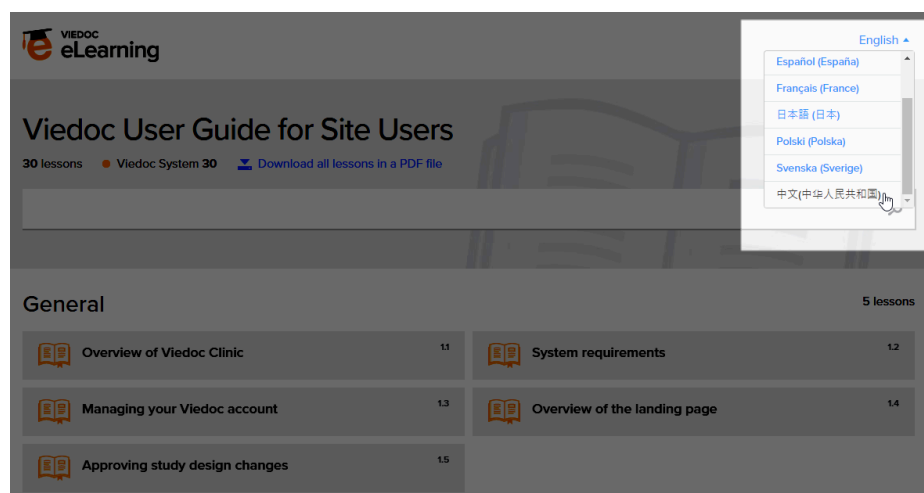
If you have mandatory documentation pending to be read and signed, this is the first page that is displayed when you access the study.

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:

The screenshot shows the 'Documentation & Training' interface. At the top, there are navigation icons and a 'Documentation & Training' header. Below the header, a message states: 'Before getting access to the study, please read all mandatory sections below and mark them as "Read & Understood". Once confirmed, Viedoc will generate a certificate of your completed training. Enjoy your trial!'. The page is divided into two columns: 'Mandatory sections' and 'Optional sections'. Under 'Mandatory sections', there is a table with two rows. The first row is for 'Study Protocol' (Latest version of the study protocol) with a 'Read & Understood at' column showing a green checkmark and the timestamp '2019-04-11 14:44 UTC'. The second row is for 'CRF Completion Guidelines' (Study-specific instructions for CRF completion) with a 'Read & Understood' link. Under 'Optional sections', there are two items: 'Informed Consent Form' (The latest version of the Informed Consent Form, dated 2019-03-14) and 'Viedoc User Guide for Monitors' (Text based eLearning for monitors).

- 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:

This screenshot shows the 'Mandatory sections' table from the previous step. Both rows now have a green checkmark and a timestamp in the 'Read & Understood at' column: 'Study Protocol' at '2019-04-11 14:44 UTC' and 'CRF Completion Guidelines' at '2019-04-11 14:55 UTC'. Below the table, a blue button labeled 'Confirm 'Read & Understood'' is visible.

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

The screenshot shows a confirmation pop-up dialog titled 'Confirm 'Read & Understood'' with a 'Cancel' button in the top right. The dialog contains the text: 'Please confirm that you have read and understood all mandatory sections. Once confirmed, Viedoc will generate a certificate of your completed training and you get access to the study.' Below this text is a password input field labeled 'Confirm with your password' and a 'Confirm' button at the bottom.

- 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:

This screenshot shows the 'Mandatory sections' table with the same data as the previous step. Below the table, a green confirmation message is displayed: 'Read & Understood' confirmed 2019-04-11 15:02 UTC. At the bottom of the page, a blue button labeled 'Download your User Certificate' is now 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

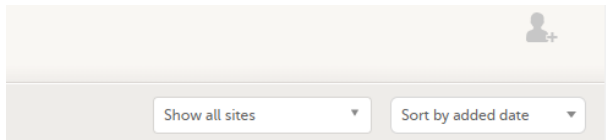
The Selection page displays all the subjects from all the sites you have access to:

Subject ID	Institution	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.

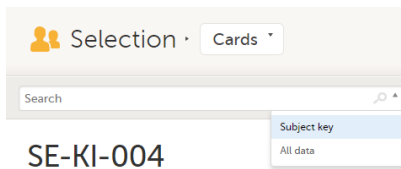


In the table view of the Selection page, you can also sort by column in descending or ascending order by selecting a column header with the arrow symbol. Lit-up arrows indicate the selected sorting in orange:

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:

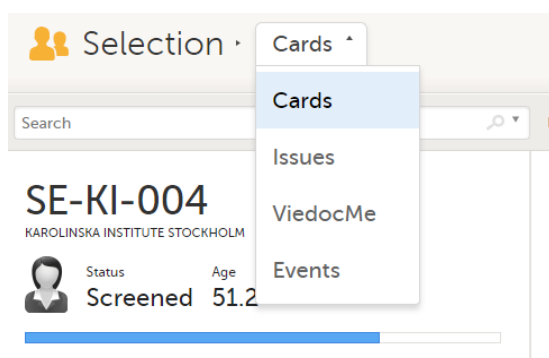
Icon	Description
	<b>Issue</b> - at least one open query and/or missing data
	<b>Task</b> - there are tasks to be completed, the number indicates the number of tasks
	<b>Complete</b> - all initiated events have been completely filled in
	<b>Signed</b> - all data that is possible to sign has been signed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

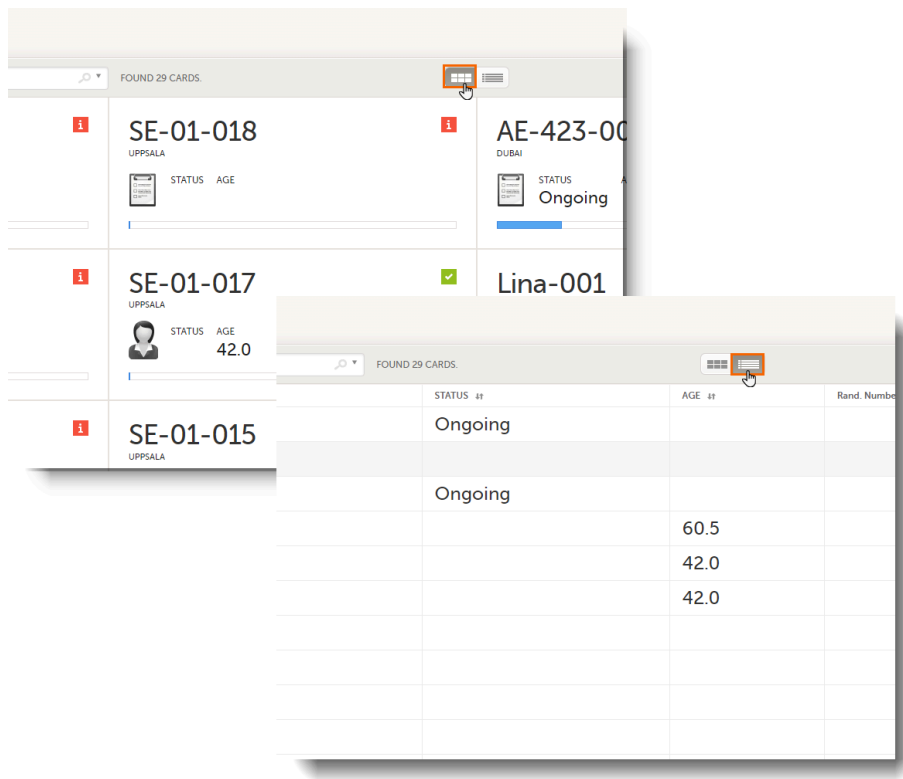
- If the study is configured with extended selection pages, you can select a view at the top of the page. Select **Cards**, **Issues**, **Viedoc Me** or **Events** from the dropdown menu to open the view. The Viedoc Me view is only available to select if the Viedoc Me feature is included in your study.



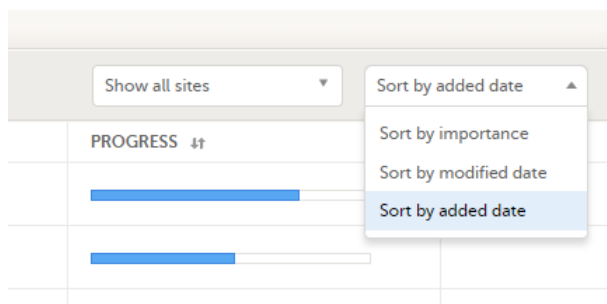
- If the study is not configured with extended selection pages, you can select between the views **Cards** and **Issues** by clicking the buttons next to the search field.

### 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:

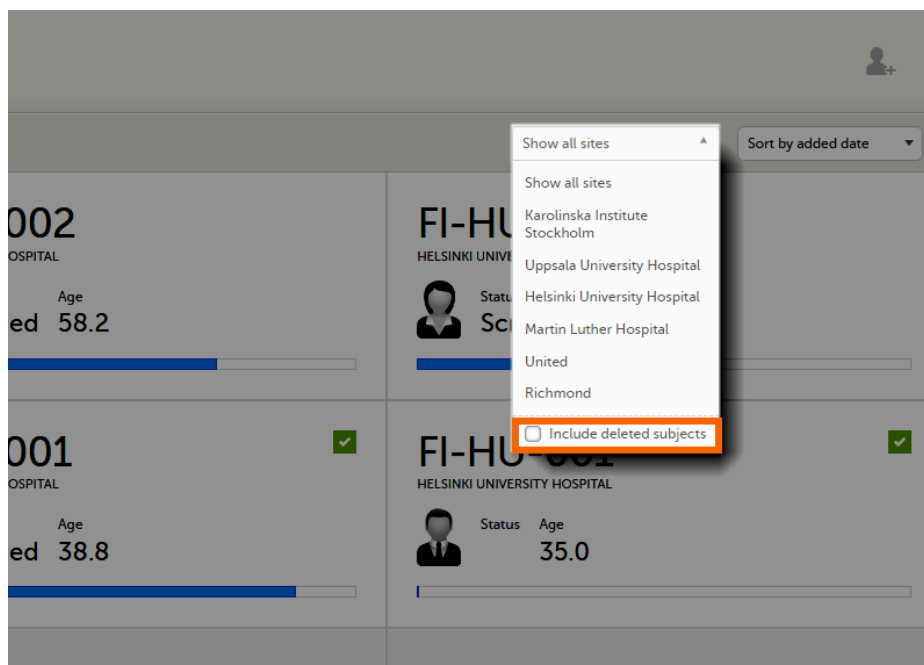


The subjects are sorted by added date, where the most recently added subject is displayed first. You can sort the subject cards by selecting an option in the upper right corner:



- **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:

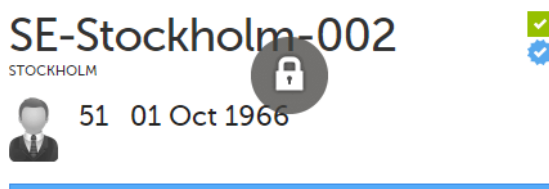


### 2.1.1 The subject card overview

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:

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:

ID	REFERENCE
FI-HU-002 Helsinki University Hospital	Medical History Medical History Description of condition
FI-HU-002 Helsinki University Hospital	Prior and Concomitant Medications Prior and Concomitant Medications Dose
FI-HU-002 Helsinki University Hospital	Prior and Concomitant Medications Prior and Concomitant Medications Dose form
FI-HU-002 Helsinki University Hospital	Prior and Concomitant Medications Prior and Concomitant Medications Frequency

FI-HU-002
#1 - Term. - Start Date
Edit
Close

Form is in view mode. Click 'Edit' to make it editable

! This form contains 8 required field(s)

### Prior and Concomitant Medications

Sequence number
Name of drug / medication / therapy

Reason for administration

Medical history

Adverse event

Other

Dose form

Choose one.

Dose

Choose one.

Dose form

Choose one.

Frequency

Choose one.

Route

Choose one.

Start date

dd MMM yyyy

Ongoing?

Yes  No

STATE
Missing data
Missing data
Missing data
Missing data

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:

CONFIRMATION	STATE
	Missing data
	Missing data
	Missing data

Show all sites

- All open issues
- All issues
- All open issues
- All queries
- Open queries
- Queries awaiting approval
- Missing data
- Form upgrade pending
- Form link broken

- 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.

The screenshot shows a web interface for 'ViedocMe' with a search bar and a table of 11 cards. The table columns are: ID, # LOGINS (LAST LOGIN), COMPLIANCE, # MISSED EVENTS (LAST MISSED), STUDY COMPLETION, NEXT SCHEDULED, and ACCOUNT STATUS. The rows represent different subjects from various sites like Karolinska Institute Stockholm, Helsinki University Hospital, and Uppsala University Hospital.

ID #1	# LOGINS (LAST LOGIN) #1	COMPLIANCE #1	# MISSED EVENTS (LAST MISSED) #1	STUDY COMPLETION #1	NEXT SCHEDULED #1	ACCOUNT STATUS #1
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-003	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...	Extra Lab ...	Extra Lab ...	Extra Kit A...	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:

**SE-KI-003**  
KAROLINSKA INSTITUTE STOCKHOLM

Status: Screened | Age: 27.9

52% of study | 2/3 events | 9/17 forms

Demographics: [Icons]

Common events: [Icons]

Medical History (0) | Adverse Events (0) | Prior and Concomitant Medications (0) | Subject's adverse reactions (0) | Cognitive Test Sample (0)

Add new event

**Screening** [Green]

Event date: [Icons]

- Check Questions: [Icons]
- Physical Examination: [Icons]
- Vital Signs: [Icons]
- Body measurements: [Icons]
- 12-Lead Electrocardiogram: [Icons]
- Laboratory results: [Icons]
- Wound Examination: [Icons]
- Visit Status: [Icons]

Protocol date not set | Scheduled date not set | Event date: 01 Jun 2022

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:

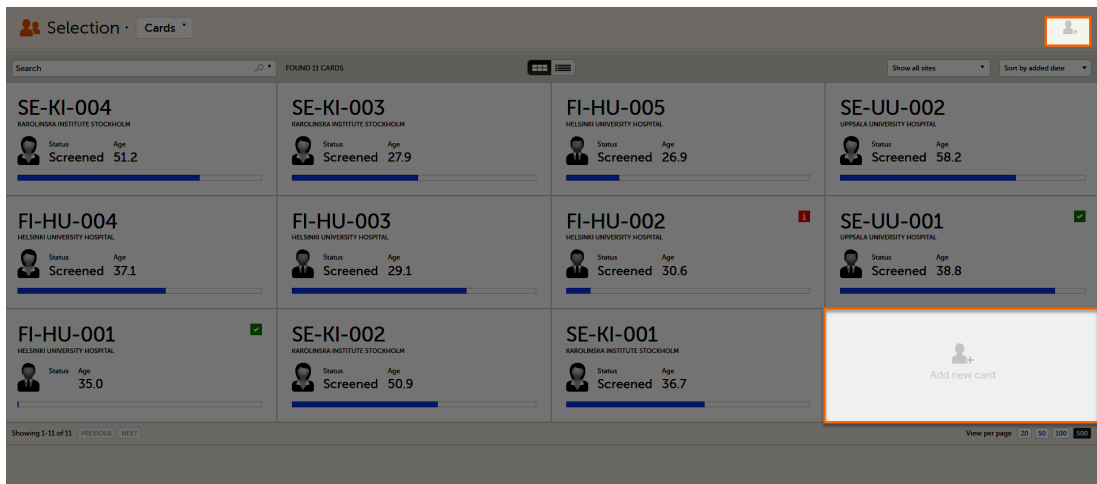
- By event type
  - **Scheduled events**
  - **Unscheduled events**
  - **Common events**
  - **Subject-initiated events**
- By site - select to view data from a specific site or from all sites
  - Select to **Include deleted subjects**

**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:



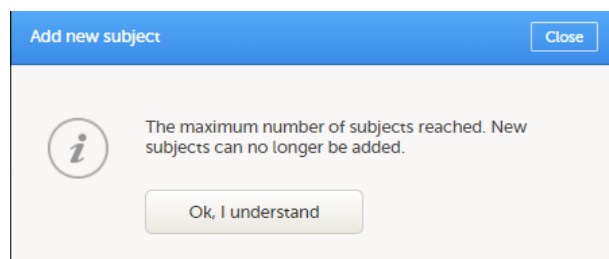
The first form in the study is displayed.

- 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.





Queries overview

# Queries overview

Published by Viedoc System 2021-11-24

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## [1. Introduction](#)

## [2. Manually raised queries](#)

### [2.1 Pre-queries](#)

#### [2.1.1 Pre-query states](#)

### [2.2 Queries](#)

## [3. Validation queries](#)

## [4. Query states](#)

## [5. Queries in export output](#)

### [5.1 Queries in ODM export](#)

### [5.2 Queries in Excel export](#)

## [6. Related topics](#)

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## 1 Introduction

A query is a question about data. In Viedoc, queries can be raised:

- Manually, by a user that has permissions for raising queries/pre-queries, after the form has been saved.
- Automatically (validation queries), by the system during data entry, for example when entered data are outside specified limits and an edit check fires.

### Note!

All the related queries are automatically closed, when:

- A form field becomes hidden.
- A form is reset.
- An event is deleted.
- A study event date is cleared (only queries raised on the study event date are closed).

In case of a validation query, when this is resolved by data edit, it is automatically closed. See [Validation queries](#).

Resolving a query always breaks the form signature, even if there are no data changes involved.

A summary of the number of queries is displayed on the study start page, as illustrated below.

**Note!** This is a summary of the whole study and it does not take into consideration the role visibility conditions.

# A demo study

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

## Study status

All sites [Sweden](#) [Finland](#) [Germany](#) [Netherlands](#) [Austria](#) [Belgium](#) [Italy](#) [United Kingdom](#) [Switzerland](#)

Issues		
Resolved queries	Open queries	Forms
13	21	71

Review		
CRA %	DM %	SDV %
3	1	4

Approval		
Inv. sign %	Queries %	Locked forms %
0	0	3

### My statistics

Patients added:	113
FPA:	04 OCT 2016
LPA:	13 AUG 2018

A query is raised in a form field. After a query is raised, the respective form is marked with the red issue icon :

## Details

**SE-111-002**  
SITE 1

STATUS COHORT 1

66% of study | 2/2 events | 8/12 forms

Demographics 2 DM CRA SDV DM CRA SDV DM CRA SDV DM CRA SDV DM CRA SDV

1 forms with issue(s) 9+ tasks pending

Common events 1 queries to be resolved

Medical / Su 1 queries to be resolved

Prior and Co

Adverse Even

Add new

Visit 1 9+ Visit 2 8

Screening 16 Sep 2021 17 Sep 2021 i

**Visit 2** Ongoing

Event date Enrolment Eligibility

2 DM CRA SDV DM CRA SDV DM CRA SDV DM CRA SDV DM CRA SDV SHOW HISTORY 1

Protocol date 16 Sep 2021- 30 Sep 2021 23 Sep 2021(-7/+7)

Event date 17 Sep 2021 + 📅

? Event date Is this the correct visit date? | Sophia Stonestream (826) 17 Sep 2021 11:04 Awaits answer

## 2 Manually raised queries

Viedoc Clinic users with permission to raise queries/pre-queries, can manually add a query to any field value.

Manually raised queries can be:

- [Pre-query](#) - needs to be promoted and released before it is visible to the site as a normal query.
- [Query](#) - visible to the site as soon as either a query was manually raised or a pre-query was released.

## 2.1 Pre-queries

Viedoc offers support for query review, that is, to review a query before it is released to the site. This is done through pre-queries.

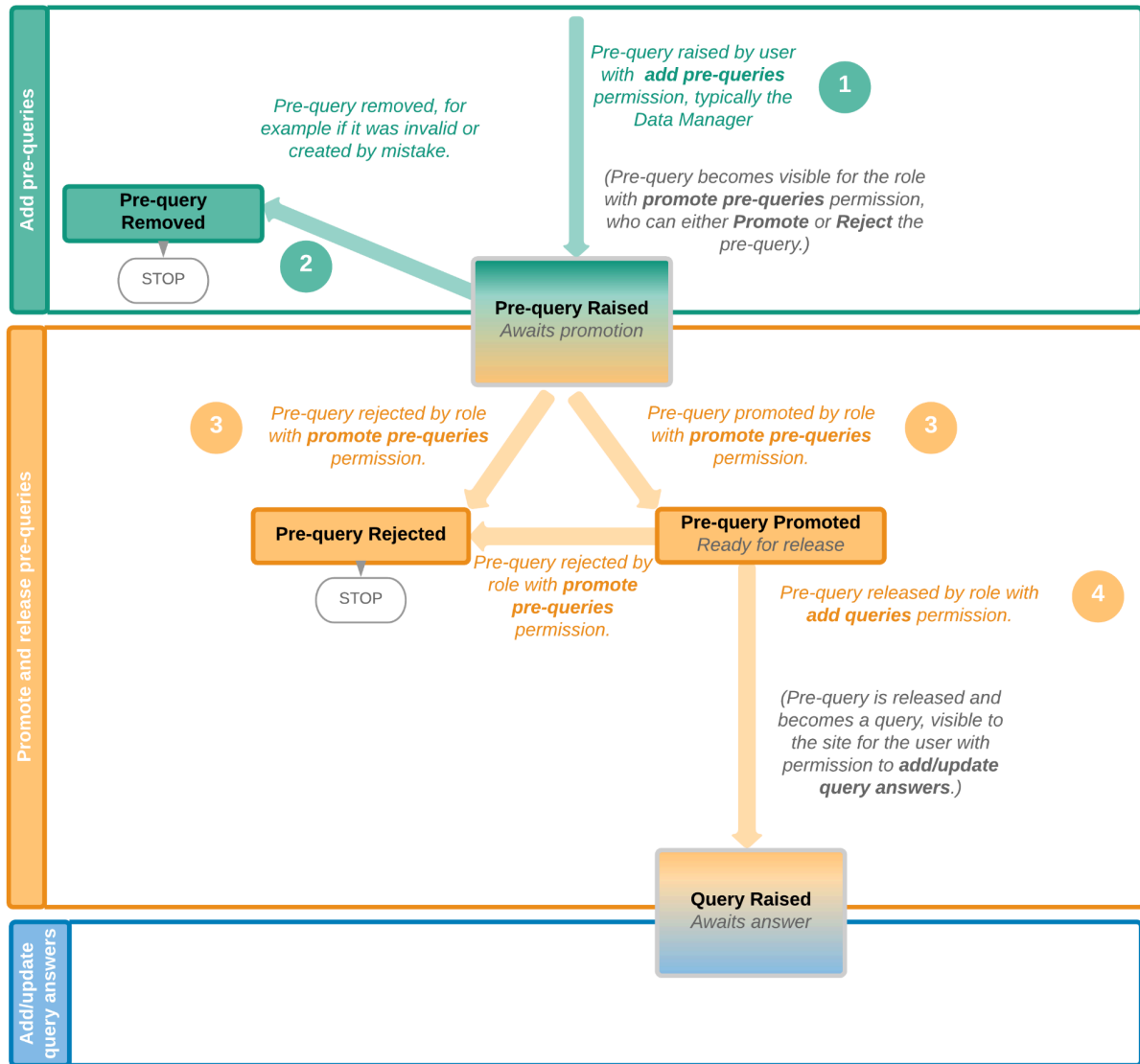
The pre-query process can involve either two or three roles, as follows:

- Two roles: one role with permission to [add pre-queries](#), typically the [Data Manager](#), and one role with permission to [promote pre-queries and add queries](#), typically the [Monitor](#).
- Three roles: one role with permission to [add pre-queries](#), for example the [Data Manager](#), one role with permission to [promote](#) the pre-query, for example the [Sponsor](#), and one role with permission to [add queries](#), for example the [Monitor](#).

An unlimited number of pre-queries can be added on the same field at the same time.

The following image illustrates the main actions that can be performed on a pre-query and all the states the pre-query goes through before it is released as a query:

1. The pre-query is added by the user with permission to [add pre-queries](#), typically the [Data Manager](#). As a result, a pre-query is raised, becoming visible for the Viedoc Clinic user with permission to [promote pre-queries](#), typically the [Monitor](#).
2. The raised pre-query can be removed, for example if it is invalid or added by mistake.
3. The raised pre-query is promoted or rejected by the Viedoc Clinic user with permission to [promote pre-queries](#), typically the [Monitor](#).
4. The promoted pre-query is released by the Viedoc Clinic user with permission to [add queries](#) (typically the [Monitor](#)), becoming a raised query that is visible for the Viedoc Clinic user with permission to [add/update query answers](#) (typically the [Investigator](#)), who will be responsible for resolving the query, as described in [Queries](#).



### 2.1.1 Pre-query states

The table below summarizes the different states of a pre-query in Viedoc Clinic, in the export output (Excel/Operational Data Model (ODM), as well as the possible actions that can be performed on a pre-query and the state this will transition to.

In Viedoc Clinic	In export output	through...	becomes...
<b>Awaits promotion</b>	PrequeryRaised	Promote pre-query (by Monitor)	PrequeryPromoted ( <b>Ready for release</b> )
		Reject pre-query (by Monitor)	PrequeryRejected ( <b>Rejected</b> )
<b>Ready for release</b>	PrequeryPromoted	Release pre-query (by Monitor)	QueryRaised ( <b>Awaits answer</b> )
		Reject pre-query (by Monitor)	PrequeryRejected ( <b>Rejected</b> )
<b>Rejected</b>	PrequeryRejected	N/A. No action can be performed on a rejected pre-query.	N/A. Final state
<b>Removed</b>	PrequeryRemoved	N/A. No action can be performed on a removed pre-query.	N/A. Final state

## 2.2 Queries

The query process involves two different roles with different permissions in handling queries:

- One role with permissions to raise and approve queries, typically the **Monitor**.
- One role with permission to resolve queries, typically the **Investigator**.

A query is raised in Viedoc either when a query is manually added or when a pre-query is released.

An unlimited number of queries can be added on the same item at the same time.

The following image illustrates the main actions that can be performed on a query and all the states it goes through:

1. A query is raised through one of the following:

- a. Manually added query by a user with **add/change queries** permission
- b. When a pre-query is released. See [pre-queries](#) section above.
- c. When a validation query was resolved by confirming data as correct, and then rejected. See [Validation queries](#) section later on.

2. A raised query can be removed, for example if it is invalid or added by mistake.

3.a. The user with permission to **add/update subject/event/form data and query answers**, typically the **Investigator**, resolves the query by one of the following:

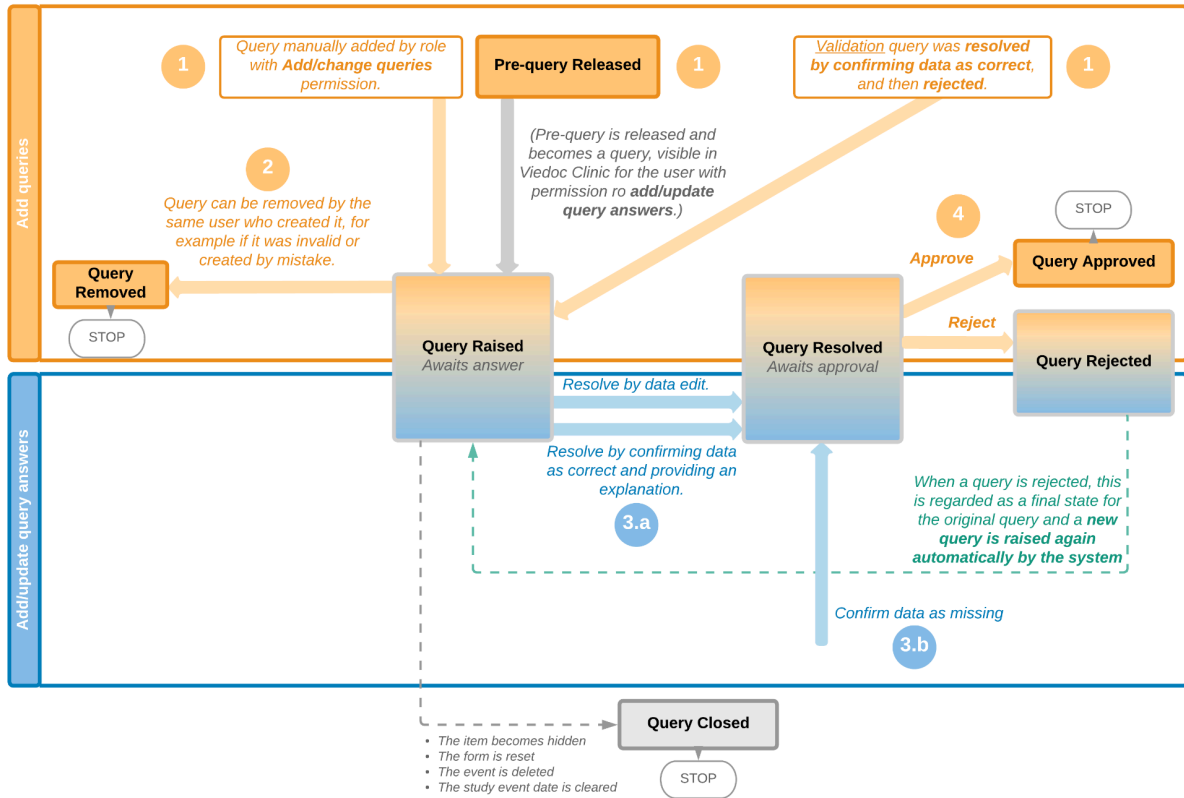
- Editing the data
- Confirming the data is correct and providing an explanation

3.b. When confirming data as missing, typically by the **Investigator**, this becomes a resolved query that awaits approval. This type of query can only be approved at step 4 below.

4. The user with permission to **add/change queries** can:

- **Approve** the resolved query.
- **Reject** the resolved query. The old query becomes **Rejected** and a new query is raised.  
**Note!** An exception is a query raised as a result of confirming data as missing by the site user (see **3.b.** above). This type of query can only be approved.

See also [Query states](#).



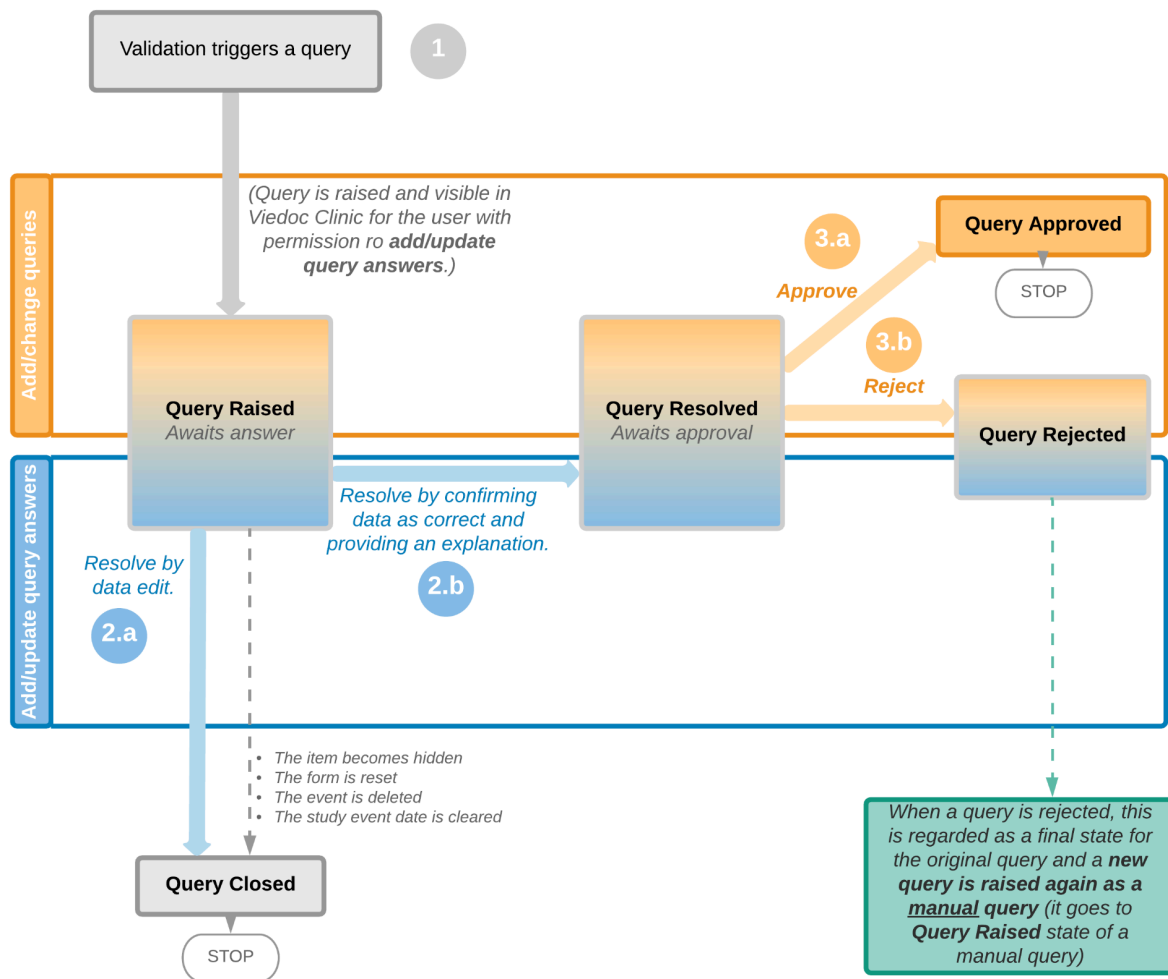
### 3 Validation queries

The following image illustrates the main actions that can be performed on a validation query and all the states it goes through:

1. A query is raised as a result of a validation performed by the system.
2. The user with permission to **add/update subject/event/form data and query answers**, typically the **Investigator**, resolves the query by one of the following:
  - a. Editing the data. As a result, the query is closed.
  - b. Confirming the data is correct and providing an explanation. The query is now resolved and waiting for approval.
3. The user with permission to **add/change queries** can:
  - a. **Approve** the resolved query.
  - b. **Reject** the resolved query. The old query becomes **Rejected** and a new query is raised and becomes a **manual** query. So from here it will follow the path of a manual query from the **Query Raised** state, as described earlier in [Manual queries > Queries](#).

See also [Query states](#).





## 4 Query states

The table below summarizes the different states of a query in Viedoc Clinic, in the export output (Excel/[ODM](#), as well as the possible actions that can be performed on a query and the state this will transition to.

**Note!** All the related queries are automatically closed, when:

- The item becomes hidden
- The form is reset
- The event is deleted
- The study event date is cleared (only queries raised on the study event date are closed)

In Viedoc Clinic	In export output	Through...	Becomes...
<b>Awaits answer</b>	QueryRaised	Remove query (by Monitor)	QueryRemoved ( <b>Removed</b> )
		Edit query (by Monitor)	QueryRaised ( <b>Awaits answer</b> )
		Resolve query (by Investigator)	QueryResolved ( <b>Awaits approval</b> )

In Viedoc Clinic	In export output	Through...	Becomes...
Awaits approval	QueryResolved	Approve query (by Monitor)	QueryApproved (Approved)
		Reject query (by Monitor)	QueryRejected (Rejected)
Rejected	QueryRejected	N/A. No action can be performed on a rejected query. <b>Note!</b> When a query is rejected, this is regarded as a final state for the original query and a new query is raised again automatically by the system.	N/A. Final state
Approved	QueryApproved	N/A. No action can be performed on an approved query.	N/A. Final state
Closed	QueryClosed	N/A. No action can be performed on a closed query.	N/A. Final state
Removed	QueryRemoved	N/A. No action can be performed on a removed query.	N/A. Final state

## 5 Queries in export output

In order to include the query information in the exported file, you need to select **Queries** under the **Type of data** in the Data export page. When selecting to include Queries, the **Query history** option becomes available.

The queries can be exported to the following export output formats:

- Microsoft Excel - Office Open Extensible Markup Language ([XML](#))
- Comma-Separated Values ([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.

The screenshot shows the 'Data Export' configuration page for 'Sweden'. Under the 'Type of data' section, the following options are checked:

- Signed data
- Not Signed data
- SDV performed or NA
- SDV pending
- Queries
- Query history

Other options that are not checked include: Review status, Event dates, Uploaded files, Medical coding, and Edit status.

For more details and instructions on how to perform an export, see [Exporting data](#).

### 5.1 Queries in ODM export

For details on how queries look in the [ODM](#) export see [Queries in ODM export](#).

## 5.2 Queries in Excel export

For details on how queries look in the Excel/[CSV](#) exported file see [Queries in Excel export](#).

---

## 6 Related topics

- [Raising and promoting pre-queries](#)
- [Raising/Approving/Rejecting queries](#)
- [Queries in ODM export](#)
- [Queries in Excel export](#)
- [Metrics](#)
- Video tutorial [Issues: Resolve a query](#)



Raising and promoting pre-queries

# Raising and promoting pre-queries

Published by Viedoc System 2020-04-27

[1. Raising a pre-query](#)

[2. Promoting/Rejecting a pre-query](#)

[3. Releasing/Rejecting a pre-query](#)

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

## 1 Raising a pre-query

To be able to raise a pre-query you must have the permission to **add pre-queries**, typically the Data Manager ([DM](#)).

To add a pre-query:

- 1 Open the form that contains the field the pre-query will be raised on.
- 2 Click the **+** icon in the top-right corner of the group that contains the respective field. The **Add new action** pop-up is displayed:
  - Select the field the pre-query will be added to from the drop down list.
  - Choose the type of action - **Add a pre-query**.
  - Enter the pre-query text.

- 3 Click **Ready**. The pre-query is created and needs to be promoted and released by the user with permission to promote pre-queries (typically the Monitor), in order to be visible as a query for the site staff.

The pre-query can be edited or removed (if invalid or created by mistake) by clicking the **Edit** or **Remove** links:

A **Removed** state is a final state for a pre-query.

A pre-query is always marked by this icon:



Once a pre-query has been promoted and released, it becomes a query and it is marked by this icon:



---

## 2 Promoting/Rejecting a pre-query

To be able to promote/reject a pre-query you must have the permission to **promote pre-queries**, typically the Monitor.

If there are any pre-queries that await promotion, these are marked as tasks. For details about tasks, see [Issues and tasks](#).

To promote a pre-query:

- 1 Browse to the task and open the respective pre-query that is marked with state **Awaits promotion**. A pop-up is displayed where you can either **Promote** or **Reject** the pre-query:

Result

▶? Is this the correct result? (pre-query)  
By Demo User (317) 13 Aug 2018 15:29 CEST

Awaits promotion

Promote  Reject

Close

- 2
  - To promote the pre-query, select **Promote** and click **Save query**. The pre-query will enter the **Ready for release** state.
  - To reject the pre-query, select **Reject** and click **Save query**. The pre-query state will be **Rejected**. This is a final state for a pre-query.

---

## 3 Releasing/Rejecting a pre-query

A pre-query can be released after it has been promoted, that is, a pre-query in **Ready for release** state.

A pre-query waiting to be released is marked as a task. For details about tasks, see [Issues and tasks](#).

After releasing a pre-query, this will become a raised query visible to the site staff. This is why, releasing a pre-query can be performed by a user with permission to add queries.

To release a pre-query:

- 1 Browse to the task and open the pre-query that is **Ready for release**. A pop-up is displayed where you can either **Release** or **Reject** the pre-query:

The screenshot shows a web interface for managing pre-queries. At the top, there is a 'Result' section with a yellow question mark icon and the text 'Is this the correct result? (pre-query)' by 'Demo User (317)' on '13 Aug 2018 15:29 CEST'. Below this is a 'Pre-query promoted!' notification with a left-pointing arrow, also by 'Demo User (317)' on '13 Aug 2018 15:30 CEST'. The main section is titled 'Ready for release' in an orange box. It contains two radio buttons: 'Release' (which is selected) and 'Reject'. Below the radio buttons is the text 'Please rephrase your query' followed by a text input field containing 'Is this the correct result?'. At the bottom of the pop-up are two buttons: 'Save query' on the left and 'Close' on the right.

- 2
  - To release the pre-query, select **Release**, rephrase the query text if needed and click **Save query**. The pre-query will be released as a query to the site, with state **Awaits answer**.
  - To reject the pre-query, select **Reject** and click **Save query**. The pre-query state will be **Rejected**. This is a final state for a pre-query.



Raising/Approving/Rejecting queries

# Raising/Approving/Rejecting queries

Published by Viedoc System 2021-11-24

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[1. Adding a query](#)

[2. Editing a query](#)

[3. Removing a query](#)

[4. Approving/Rejecting a query](#)

[4.1 Approving a query](#)

[4.2 Rejecting a query](#)

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

A query can be added/edited/removed/approved by the user with permission to add/change queries.

---

## 1 Adding a query

To raise a query:

- 1 Open the form that contains the field the query will be raised on.
- 2 Click the + icon in the top-right corner of the group that contains the respective field. The **Add new action** pop-up is displayed.
  - Select the field the query will be added to from the drop down list.
  - Choose the type of action - **Add query**.
  - Enter the query text.

The screenshot shows a dialog box titled "Add new action" with a plus icon in the top-left corner. It contains two main sections: "Choose type of action" and "Add query text here".

In the "Choose type of action" section, there is a radio button selected next to "Add a query" with a question mark icon to its right.

In the "Add query text here" section, there is a text input field containing the text "Is the event date correct?".

At the bottom of the dialog, there are two buttons: "Ready" on the left and "Cancel" on the right.

- 3 Click **Ready**. The query was raised and it is now visible for the site and ready to be resolved, with state **Awaits answer**:

The screenshot shows a Viedoc form titled "Screening" with a header bar containing "DE-95-076" and "Screening [14 07 2021]". A "Close" button is in the top right. Below the header, a message states "Form is in read-only mode." The main content area shows a "Screening" section with a "2" icon and several status icons (DM, CRA, SDV, Lock, Info). A "SHOW HISTORY" button with a "4" icon and a toggle switch is on the right. The "Event date" field contains "14 07 2021". Below the field, a query is displayed: "? Event date | Is the event date correct? | Soff Ann (825) 17 Sep 2021 11:11 CEST" with an "Awaits answer" button. At the bottom, there are checkboxes for "Clinical review", "SDV", and "Lock", and a "Form History" button. The footer contains technical information: "Soff Ann | Viedoc™ 4.68.7923.26999 | 2021-09-17T11:11 CEST 1 | 39.0 | Demo Study | Berlin Hospital".

After the query has been raised it can be:

- Resolved by the site (Investigator).
- Edited by any user with permission to add/change queries.
- Removed by any user with permission to add/change queries (in case the query was invalid or added by mistake).

## 2 Editing a query

The text of a raised query can be edited as long as the query was not resolved (**Awaits answer**).

To edit a query:

- 1 Open the query (from the respective form) and click **Edit**:

The screenshot shows a query dialog box for the "Gender" field. The query is titled "second query" and was raised by "Demo User (317)" on "17 Nov 2017 13:24 CET". Below the query text are "Edit" and "Remove" buttons. A hand cursor is pointing at the "Edit" button. At the bottom of the dialog, there is an "Awaits answer" button and a "Close" button.



- 2 Edit the text and click **Save query**:

The query text is now updated.

### 3 Removing a query

A query can be removed, for example if invalid or added by mistake, as long as the query was not resolved (**Awaits answer**).

To remove a query:

- 1 Open the query (from the respective form) and click **Remove**:

- 2 Click **Save query** to confirm:

The query state is **Removed**. This is a final state for a query.

## 4 Approving/Rejecting a query

After the query was resolved by the site (typically the Investigator), it is marked as a task, it is in **Awaits approval** state and can be either approved or rejected.

**Note!** An exception is a query raised as a result of confirming data as missing by the site user. This type of query can only be approved.

The screenshot shows the Viedoc™ Screening form interface. At the top, there is a header bar with a user icon, the ID 'DE-95-076', the title 'Screening [14 07 2021]', and a 'Close' button. Below the header, a notification bar indicates '1 queries to be approved' and 'Form is in read-only mode.' The main content area is titled 'Screening' and includes a 'SHOW HISTORY' button with a '4' next to it. A form field for 'Event date' contains the value '14 07 2021'. Below the form field, a query history entry is displayed: 'Event date Yes, the event date is correct. | Soff Ann (825) 17 Sep 2021 13:05 CEST' with an 'Awaits approval' status. At the bottom of the form, there are checkboxes for 'Clinical review', 'SDV', and 'Lock', and a 'Form History' button. The footer contains the text: 'Soff Ann | Viedoc™ 4.68.7923.26999 | 2021-09-17T13:08 CEST 1 | 39.0 | Demo Study | Berlin Hospital'.

### 4.1 Approving a query

To approve a query:

- 1 Open the query. The query pop-up opens displaying the list of the query history:

The screenshot shows a query pop-up dialog. At the top, there is a text input field for 'Event date'. Below it, the query history is displayed: 'Is the event date correct? By [redacted] 17 Sep 2021 11:11 CEST' and 'Data confirmed as correct! Yes, the event date is correct. By [redacted] 17 Sep 2021 13:05 CEST'. Below the history, there is an 'Awaits approval' status. At the bottom, there are two radio buttons: 'Approve' and 'Reject'. A 'Close' button is located at the bottom right of the dialog.

2 Select **Approve** and click **Save query**:

Event date

? Is the event date correct?  
By [redacted] 17 Sep 2021 11:11 CEST

← Data confirmed as correct!  
Yes, the event date is correct.  
By [redacted] 17 Sep 2021 13:05 CEST

**Awaits approval**

Approve  Reject

Save query Close

The query is now **Approved**. This is a final state for a query:

Event date

? Is the event date correct?  
By [redacted] 17 Sep 2021 11:11 CEST

← Data confirmed as correct!  
Yes, the event date is correct.  
By [redacted] 17 Sep 2021 13:05 CEST

← Answer approved!  
By [redacted] 17 Sep 2021 13:19 CEST

**Approved**

Close

## 4.2 Rejecting a query

To reject a query:

1 Open the query. The query pop-up opens displaying the list of the query history:

Event date

? Is the event date correct?  
By [redacted] 17 Sep 2021 11:11 CEST

← Data confirmed as correct!  
Yes, the event date is correct.  
By [redacted] 17 Sep 2021 13:05 CEST

**Awaits approval**

Approve  Reject

Close

2 Select **Reject**, optionally rephrase the query and click **Save query**:

The dialog box is titled "Event date" and contains the following elements:

- A question: "Is the event date correct?" with a question mark icon. Below it, it says "By Soff Ann (825) 17 Sep 2021 13:27 CEST".
- A confirmation message: "Data confirmed as correct! Yes, the event date is correct." with a left-pointing arrow icon. Below it, it says "By Soff Ann (825) 17 Sep 2021 13:28 CEST".
- A section titled "Awaits approval" in an orange box.
- Two radio buttons: "Approve" (unselected) and "Reject" (selected).
- Text: "Please rephrase your query" followed by a text input field containing "Please check once more!".
- Two buttons at the bottom: "Save query" (with a mouse cursor over it) and "Close".

The old query is closed with state **Rejected** and a new query is raised that **Awaits answer**:

The interface is titled "Final Visit" and includes a header with "DM", "CRA", "SDV", a lock icon, an information icon, and a "SHOW HISTORY" button. The main content area shows:

- Protocol date:** 18 07 2021- 01 08 2021 (with a range of 25 07 2021(-7/+7) on the right).
- Event date:** 21 07 2021 (with a calendar icon).
- Event history table:**

Event date	By	Time	Status
21 07 2021	Event initiated	22 Jul 2021 15:41 CEST	
Event date	Please check once more!	17 Sep 2021 13:30 CEST	Awaits answer
Event date	Yes, the event date is correct.	17 Sep 2021 13:28 CEST	Rejected



Exporting data

# Exporting data

Published by Viedoc System 2024-03-19

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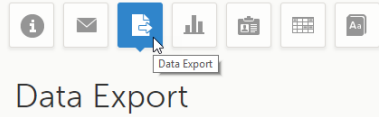
[7.1 Latest exports](#)

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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](#))

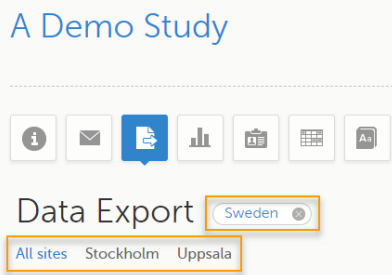
## 2 Filtering the data to be previewed/exported

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.

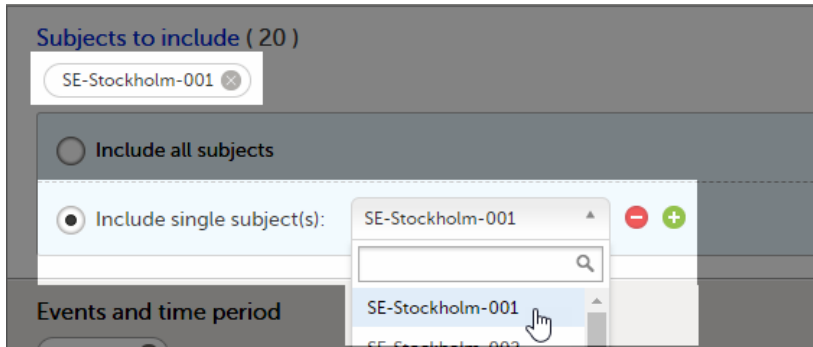
While filtering for country or site, the number of subjects depicted in between brackets in the **Subjects to include** field is updated accordingly.

### 2.2 Including subjects

You can choose to include all subjects in the data preview or export, or include a selection of subjects.

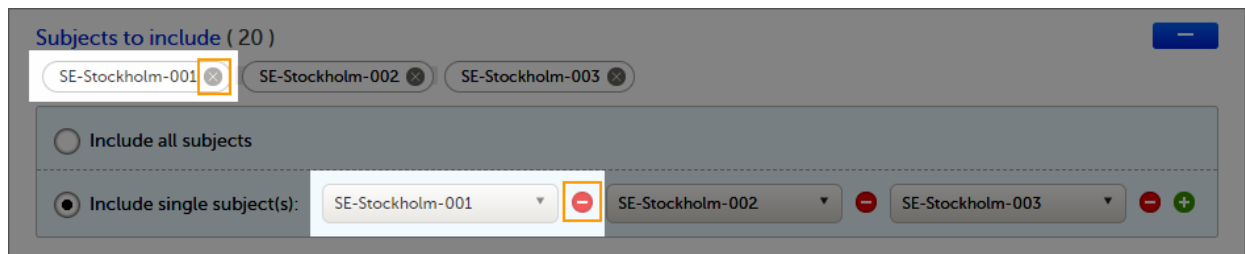
To select which subjects to include:

- 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

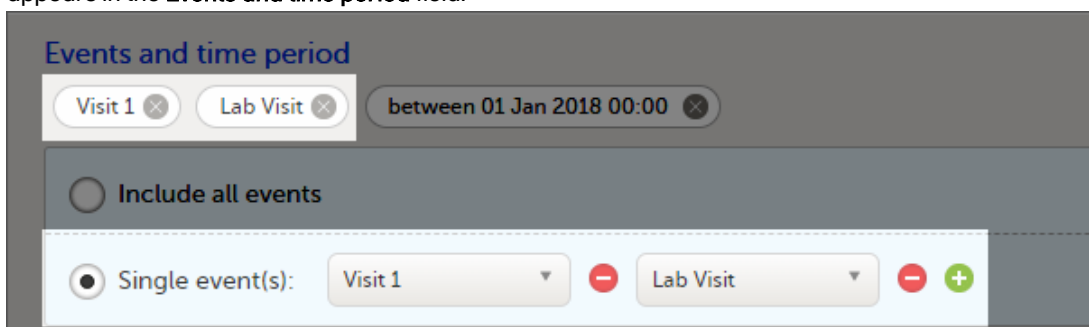
You can choose to:

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

To select which events to include:

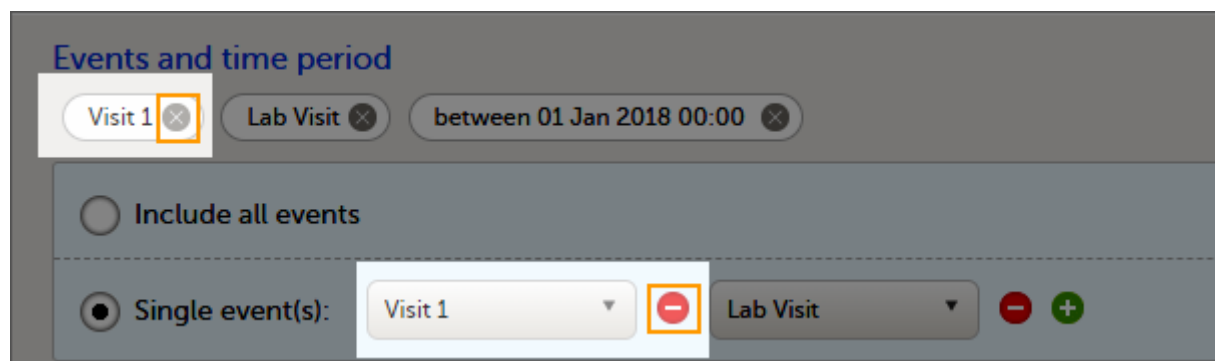
- 1 Select **Single event(s)**.

- 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.

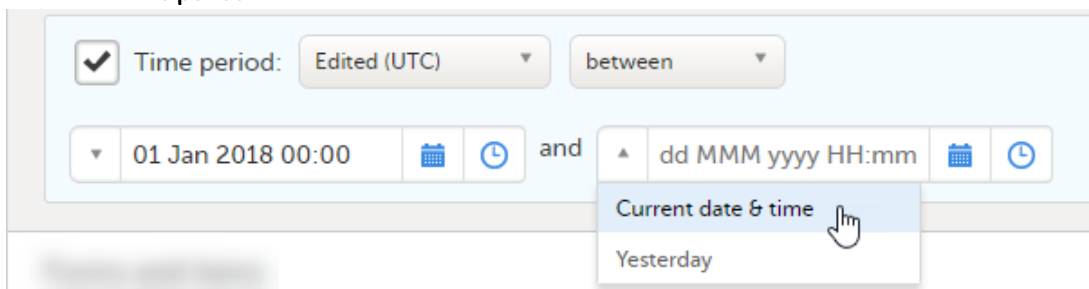
To undo the selection of certain events, click the - icon, or click the cross x icon next to the event:



### 2.3.2 Selecting a time period

To include data from a specific time period:

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

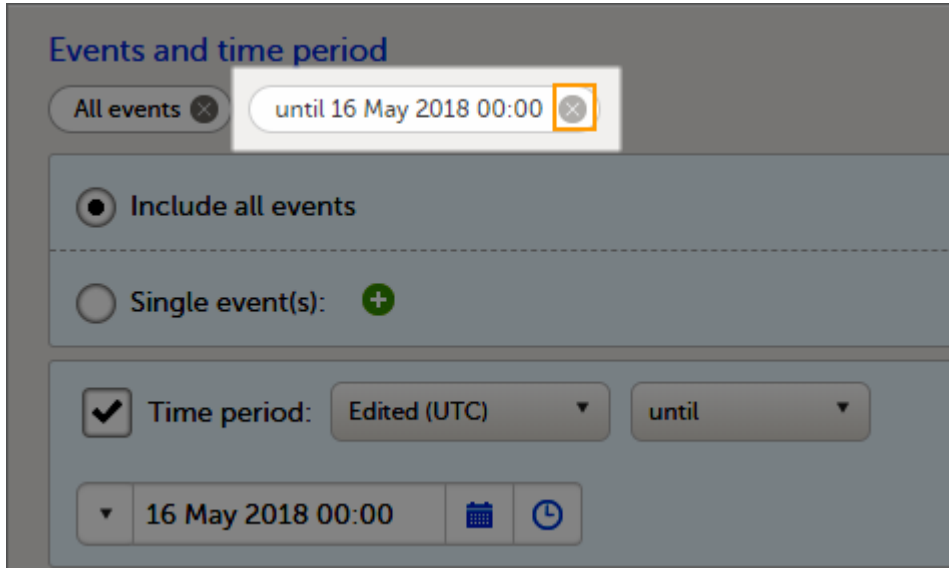


- 2 Select one of the following options from the first drop-down list:
  - **Edited (UTC)** - to include data based on the date they were added or last edited.  
**Note!** This feature includes data based on Coordinated Universal Time (UTC), not on the local time a user has added or edited data. Note 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 **x** icon next to it:



## 2.4 Forms and items

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

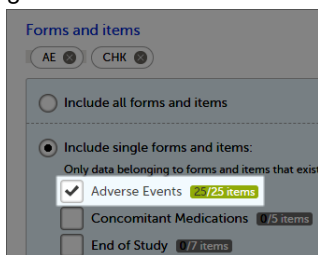
- **Include all forms and items** (default)
- **Include single forms and items** - see the instructions below on how to select forms and items.

**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.

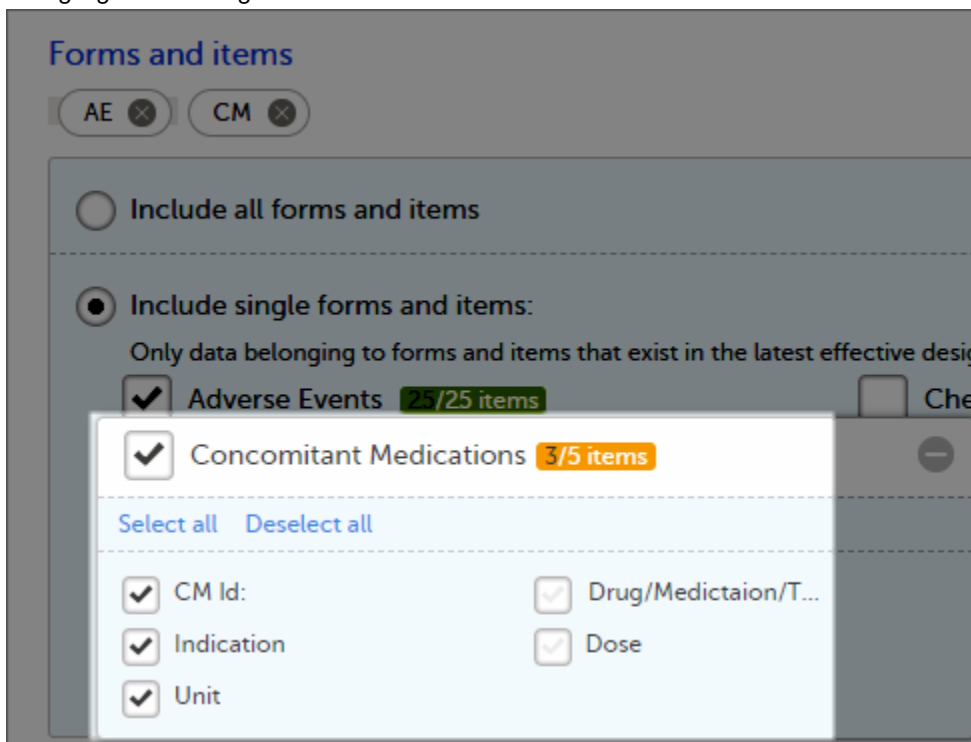
To include data from specific form(s):

- 1 Select **Include single forms and items**.

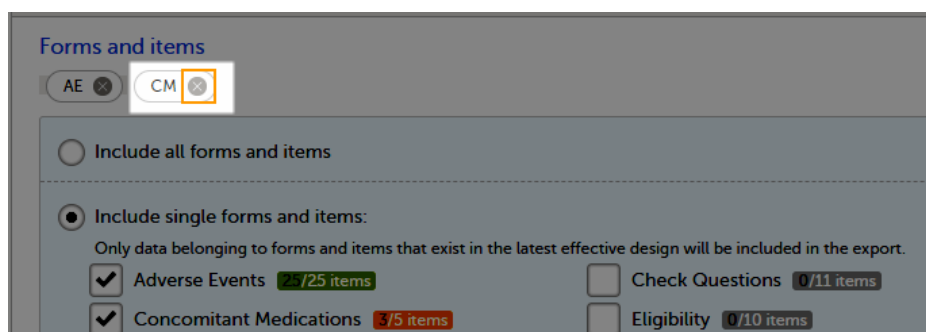
- 2 Select the forms and items to be included, in one of the following ways:
- Select the checkbox corresponding to a form in the list displayed, to include the respective form with all the items contained. The selected/total number of items will be highlighted in green:



- 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

Column name	Description
<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

Column name	Description
<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

Column name	Description
<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.
<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:

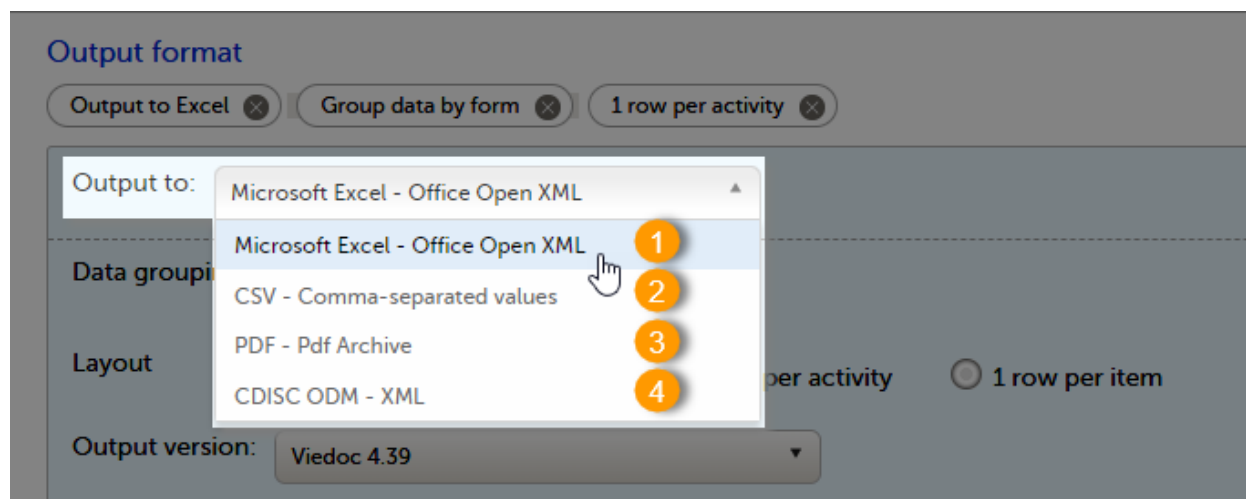
- Microsoft Excel - Office Open [XML](#)
- [CSV](#)
- [ODM](#)

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.)

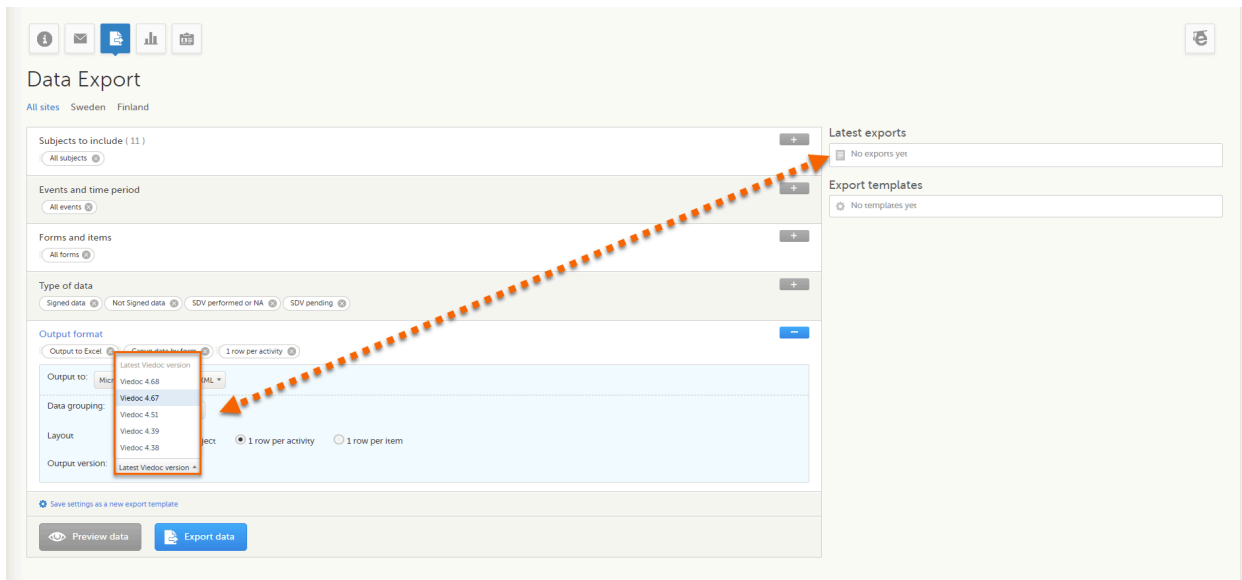
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# 4 Export compatibility with previous Viedoc versions

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.
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	<p>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> .</p>
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:

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.

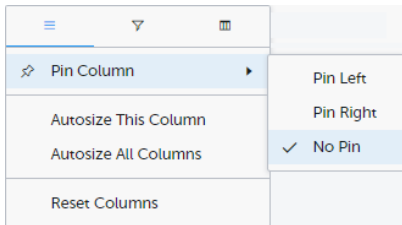
### 5.1.1 Column menu

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.

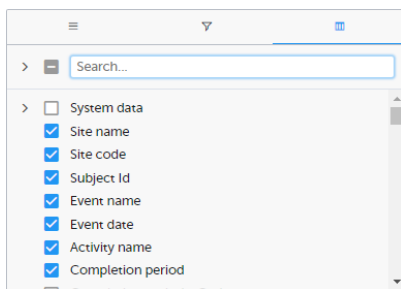
- **Number filter** with the following filter operators:
  - Equals
  - Not equal
  - Less than
  - Less than or equals
  - Greater than
  - Greater than or equals
  - In range

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:



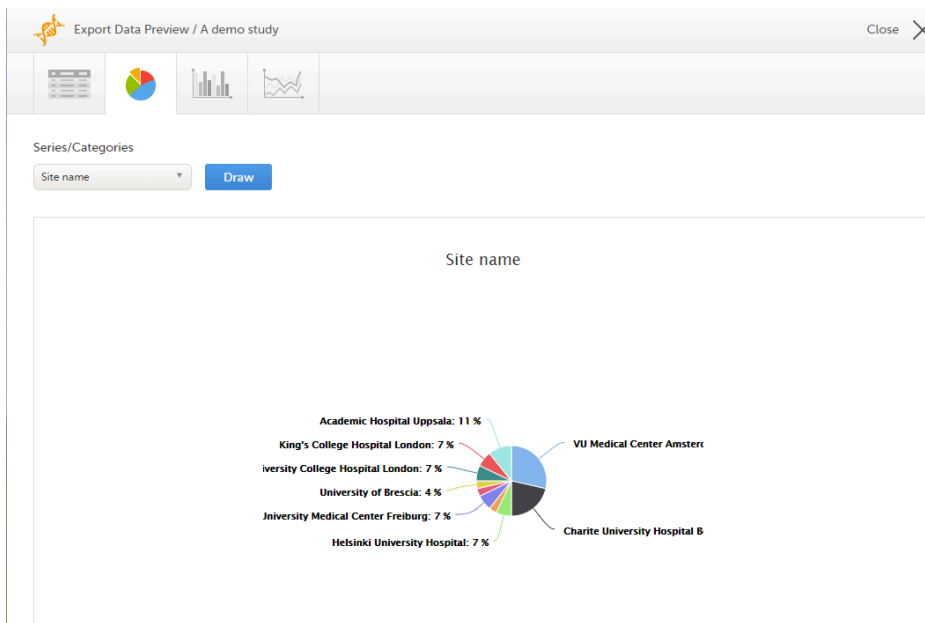
**Copy:** Copies the cell value to your clipboard.

**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**:



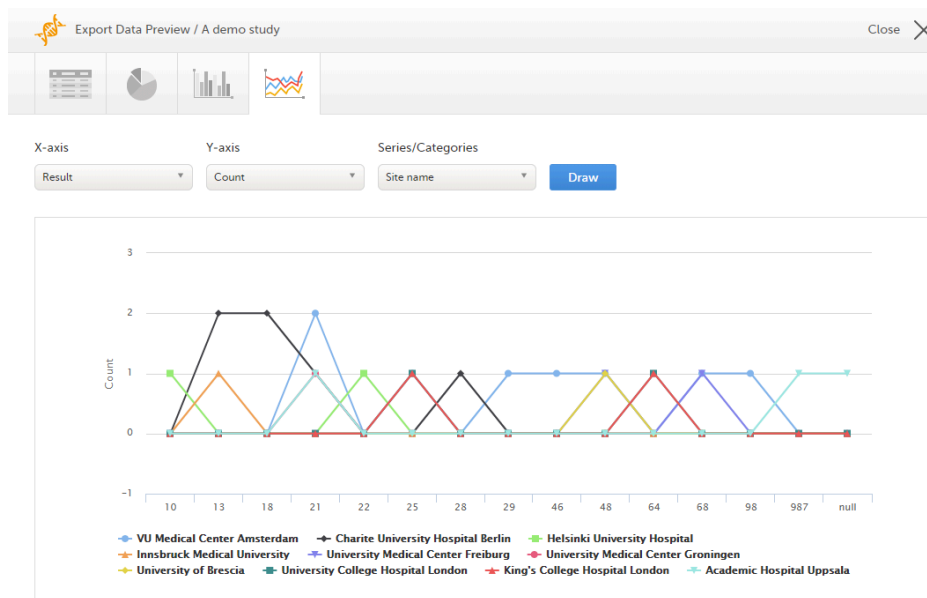
If you have selected **Group data by form**, you can only choose data sets from the form you have selected on the data table tab.

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.

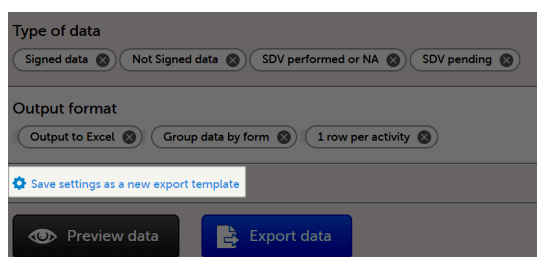
## 6 Data export templates

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:

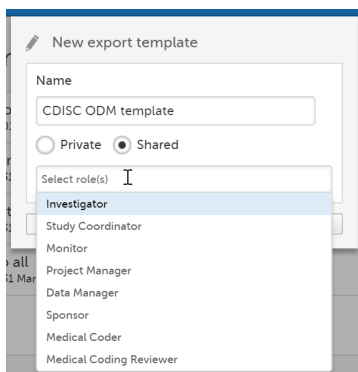
- 1 Click **Save settings as a new export template**.



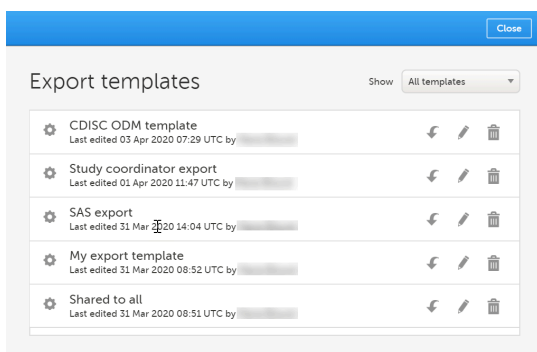


- 2 In the pop-up that is displayed, enter a name for the template and select whether it should be private or shared.

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.



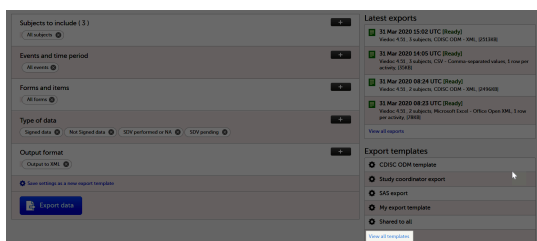
- 3 Click **Save**. Now the **Export templates** list is displayed, with your newly created template at the top of the list:



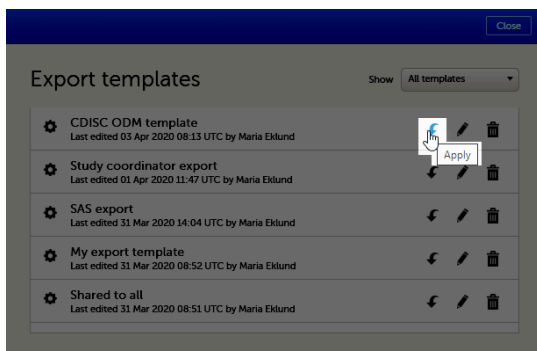
## 6.2 Applying a data export template

To apply a data export template:

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

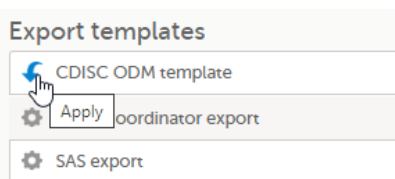


- 2 Click the apply icon for the template that you want to apply.



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

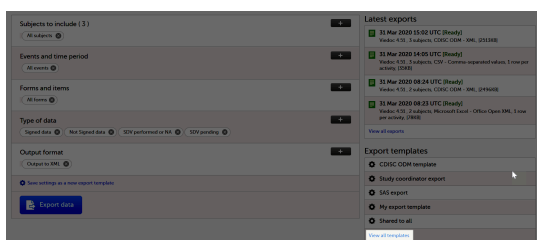
**Tip!** Alternatively, you can use the quick access apply, available in the **Export templates** area:



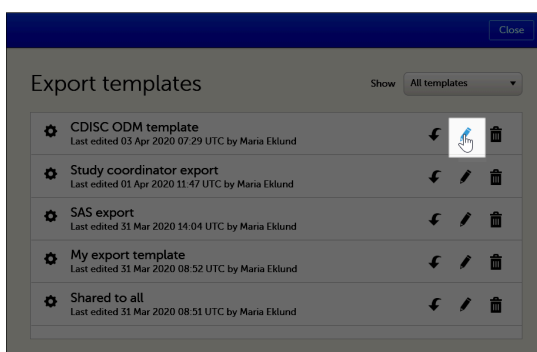
## 6.3 Editing a data export template

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.



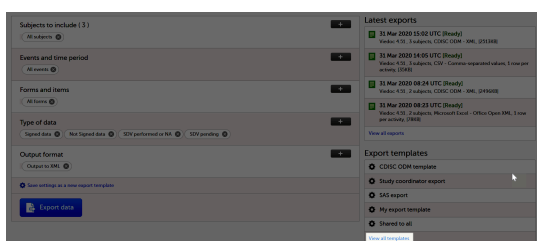
- 3 In the pop-up that is displayed, you can edit the name of the export template and the settings for **Private/Shared**.

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

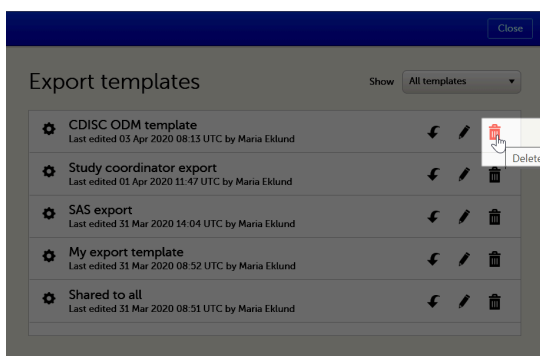
## 6.4 Deleting a data export template

To delete a data export template:

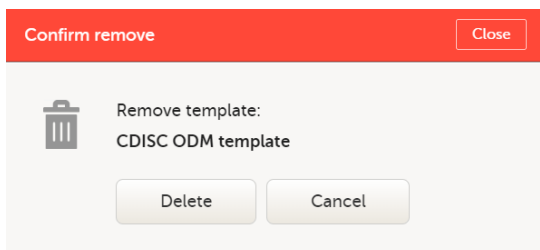
- 1 Click **View all templates** in the **Export templates** area of the **Data export** page.



- 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**.

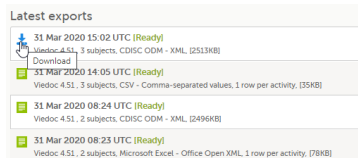


**Note:** You can only delete a data export template that you created yourself.

## 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*.

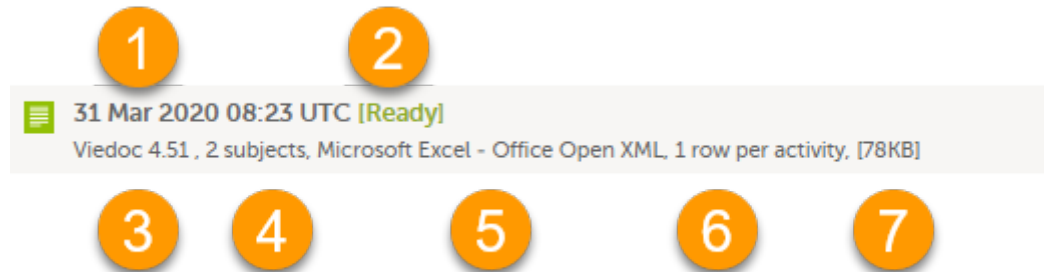
**Note!** If any of the characters that are invalid for a filename in Windows are used within any of the *SponsorCode* or *SiteCode*, these characters will be automatically replaced with - within the exported filename.

## 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
<a href="#">View all exports</a>	



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	Gender - Code	Date of Birth	Age	Number	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.



Column	Description
<b>Form sequence number</b>	<p>Counter that identifies the instance of the respective form within the respective activity. This is mostly used for repeating forms.</p> <p>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.</p> <p>Form sequence number increases one step every time reset/initiate occurs.</p>
<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**.

The following columns are specific to each form, one column for each item in the respective form. Each column has the *<Item name>*, as set in the study design (in Viedoc Designer) as column header.

# Data Export

All sites Sweden Finland Germany Netherlands Austria Belgium Italy United Kingdom Switzerland

Subjects to include (112) +

All subjects -

---

Events and time period +

All events -

---

Forms and items +

All forms -

---

Type of data +

Signed data - Not Signed data - SDV performed or NA - SDV pending -

---

Output format +

Output to Excel - **Group data by form** - 1 row per activity -

[Save settings as a new export template](#)

Preview data Export data

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	Date/Time of Informed Consent	Gender	Gender - Code	Date/Time of Birth
SiteSeq	SiteName	SiteCode	SubjectSeq	SubjectId	EventSeq	EventId	EventName	EventDate	ActivityId	ActivityName	FormSeq	DesignVer	DMIC	DMSEX	DMSEXCD	DMDOB
1	Academic Hospital Uppsala	AHU	1	SE-AHU-001	1	SCR	Add subject	2016-10-04	SCR	Add subject	1	3.0	2016-07-04	Male	1	1964-06-11
2	Academic Hospital Uppsala	AHU	2	SE-AHU-001	1	SCR	Add subject	2016-10-04	SCR	Add subject	1	3.0	2016-10-02	Female	2	1979-05-28
3	Academic Hospital Uppsala	AHU	3	SE-AHU-001	1	SCR	Add subject	2016-10-04	SCR	Add subject	1	3.0	2016-09-04	Male	1	1968-08-04
4	Academic Hospital Uppsala	AHU	4	SE-AHU-001	1	SCR	Add subject	2016-10-04	SCR	Add subject	1	3.0	2016-06-05	Male	1	1952-10-01
5	Academic Hospital Uppsala	AHU	5	SE-AHU-001	1	SCR	Add subject	2016-10-04	SCR	Add subject	1	3.0	2016-08-07	Female	2	1959-04-06
6	Charite University Hospital Berlin	CUB	1	DE-CUB-001	1	SCR	Add subject	2016-10-04	SCR	Add subject	1	3.0	2016-08-07	Male	1	1980-02-22
7	Charite University Hospital Berlin	CUB	2	DE-CUB-001	1	SCR	Add subject	2016-10-04	SCR	Add subject	1	3.0	2016-03-02	Male	1	1960-11-02
8	VU Medical Center Amsterdam	VUA	1	NL-VUA-001	1	SCR	Add subject	2016-10-04	SCR	Add subject	1	3.0	2016-10-02	Male	1	1961-07-31
9	VU Medical Center Amsterdam	VUA	2	NL-VUA-001	1	SCR	Add subject	2016-10-04	SCR	Add subject	1	3.0	2016-08-07	Male	1	1973-12-21
10	Academic Hospital Uppsala	AHU	6	SE-AHU-001	1	SCR	Add subject	2016-10-05	SCR	Add subject	1	12.0	2016-10-02	Female	2	1976-02-01
11	Academic Hospital Uppsala	AHU	7	SE-AHU-001	1	SCR	Add subject	2016-10-05	SCR	Add subject	1	12.0	2016-10-02	Male	1	1965-06-29
12	Karolinska Institute Stockholm	KIS	1	SE-KIS-001	1	SCR	Add subject	2016-10-05	SCR	Add subject	1	12.0	2016-10-03	Male	1	1964-03-31
13	Academic Hospital Uppsala	AHU	8	SE-AHU-001	1	SCR	Add subject	2016-10-05	SCR	Add subject	1	13.0	2016-10-02	Female	2	1973-05-21
14	VU Medical Center Amsterdam	VUA	6	NL-VUA-001	1	SCR	Add subject	2016-10-20	SCR	Add subject	1	13.0	2016-10-20	Female	2	1977-10-25

## 4.2 Do not group data

If you choose not to group the data, then all data from all forms will be exported in the same sheet (**Data**) of the output file.

The example in the image below shows an export with the default settings for the **Layout**, that is, **1 row per activity**.

In the **Data** sheet, the first columns (to the left, marked in **green**) are the common for all the forms and provide information about the site, subject, event and activity.

The following columns (to the right, marked in **orange**) contain form-specific information for all the forms within the event. For each of the forms, the following columns are added:

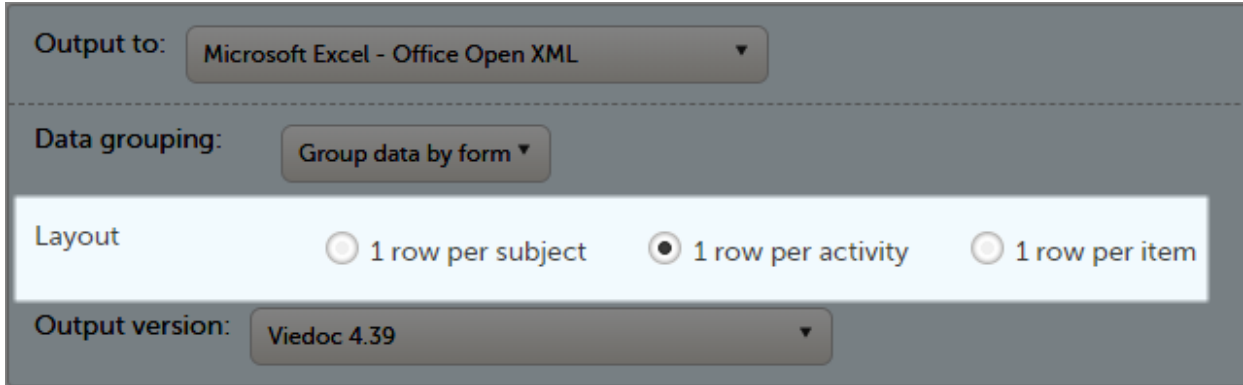
- `<FormName>_Design Version` - the form name, as set in the study design (in Viedoc Designer) and displayed in Clinic. In the example in the image, the form name is *Demographics*.
- `<FormName>(<Form Repeat Key>)_<ItemName>` - for each item in the respective form. The form name and item name, as set in the study design (in Viedoc Designer) and displayed in Clinic. The *Form Repeat Key* identifies the instance of the form (for repeating forms). For non-repeating forms, the *Form Repeat Keys* always 1.

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	Demograp hics- Design Version	Demograp hics(1)- Date/Time of Informed Consent	Demograp hics(1)- Gender	Demograp hics(1)- Birth	Demograp hics(1)- Age	Demograp hics(1)- CHB Result	Demograp hics(1)- CHB Cnfr	Demograp hics(1)- Reason for No	Demograp hics(1)- Reason for No	Demograp hics(1)- Race	Demograp hics(1)- Code	
SiteSeq	SiteName	SiteCode	SubjectSeq	SubjectId	EventSeq	EventId	EventName	EventDate	ActivityId	ActivityName	DesignVer	DMIC	DMSEX	DMSEXCD	DMDAGE	DMCBP	DMCBPCT	DMCBPRT	DMCBPRT	DMCBPRT	DMCBPRT	DMCBPRT
1	Academic Hospital Uppsala	AHU	1	SE-AHU-001	1	SCR	Add subject	2016-10-04	SCR	Add subject	3.0	2016-07-04	Male	1	52.1					White	5	
2	Academic Hospital Uppsala	AHU	1	SE-AHU-001	1	V1	Visit 1	2016-10-04	V1	Visit 1	3.0	2016-10-02	Female	2	37.3	Yes	1			Asian	5	
3	Academic Hospital Uppsala	AHU	2	SE-AHU-001	1	SCR	Add subject	2016-10-04	SCR	Add subject	3.0	2016-10-02	Female	2	37.3	Yes	1			Asian	5	
4	Academic Hospital Uppsala	AHU	2	SE-AHU-001	1	V1	Visit 1	2016-10-04	V1	Visit 1	3.0	2016-10-02	Female	2	37.3	Yes	1			Asian	5	
5	Academic Hospital Uppsala	AHU	3	SE-AHU-001	1	SCR	Add subject	2016-10-04	SCR	Add subject	3.0	2016-09-04	Male	1	48.1					White	5	
6	Academic Hospital Uppsala	AHU	3	SE-AHU-001	1	V1	Visit 1	2016-10-02	V1	Visit 1	3.0	2016-10-02	Female	2	57.3	No	0	Postmenop	1	White	5	
7	Academic Hospital Uppsala	AHU	4	SE-AHU-001	1	SCR	Add subject	2016-10-04	SCR	Add subject	3.0	2016-06-05	Male	1	63.7					Black	1	
8	Academic Hospital Uppsala	AHU	5	SE-AHU-001	1	SCR	Add subject	2016-10-04	SCR	Add subject	3.0	2016-08-07	Female	2	57.3	No	0	Postmenop	1	White	5	
9	Charite Uni CUB	CUB	1	DE-CUB-001	1	V1	Visit 1	2016-10-02	V1	Visit 1	3.0	2016-08-07	Male	1	36.5					White	5	
10	Charite Uni CUB	CUB	2	DE-CUB-001	1	SCR	Add subject	2016-10-04	SCR	Add subject	3.0	2016-03-02	Male	1	55.3					White	5	
11	Charite Uni CUB	CUB	2	DE-CUB-001	1	V1	Visit 1	2016-10-04	V1	Visit 1	3.0	2016-10-02	Female	2	57.3	No	0	Postmenop	1	White	5	

# 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	Site name	Site code	Subject sequence number	Subject Id	Design version	Informed Consent	subject- (1)Gender	Add subject- (1)Gender	Add subject- (1)Date/Time of Birth	subject- (1)Age	subject- (1)CHB Result	subject- (1)Reason for No CHB Code	Add subject- (1)Race	Add subject- (1)Race Code	
Academic f AHU	1	SE-AHU-001	1	3.0	2016-07-04	Male	1	1964-06-11	52.1				White	5	
Academic f AHU	2	SE-AHU-002	2	3.0	2016-10-02	Female	2	1979-05-28	37.3	Yes	1		Asian	5	
Academic f AHU	3	SE-AHU-003	3	3.0	2016-09-04	Male	1	1968-08-04	48.1				White	5	
Academic f AHU	4	SE-AHU-004	4	3.0	2016-06-05	Male	1	1952-10-01	63.7				Black	1	
Academic f AHU	5	SE-AHU-005	5	3.0	2016-08-07	Female	2	1959-04-06	57.3	No	0	Postmenop	1	White	5
Charite Uni CUB	1	DE-CUB-001	1	3.0	2016-08-07	Male	1	1980-02-22	36.5				White	5	
Charite Uni CUB	2	DE-CUB-002	2	3.0	2016-03-02	Male	1	1960-11-02	55.3				White	5	
VU Medica VUA	1	NL-VUA-001	1	3.0	2016-10-02	Male	1	1961-07-31	55.2				White	5	
VU Medica VUA	2	NL-VUA-002	2	3.0	2016-08-07	Male	1	1973-12-21	42.6				White	5	
Academic f AHU	6	SE-AHU-006	6	12.0	2016-10-02	Female	2	1976-02-01	40.7	Yes	1		White	5	

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 Code
1	number	Site name	Site code	number	Subject Id	number	Event Id	Event name	Event date	Activity Id	Activity name	number	Design version	PEYN	PEYNCD
2	SiteSeq	SiteName	SiteCode	SubjectSeq	SubjectId	EventSeq	EventId	EventName	EventDate	ActivityId	ActivityName	FormSeq	DesignVer	PEYN	PEYNCD
3	1	Academic	AHU	11	SE-AHU-011	1	V1	Visit 1	2017-10-20	V1		1	32.0	Yes	1
4	1	Academic	AHU	14	SE-AHU-014	1	V1	Visit 1	2017-11-10	V1		1	33.0	No	0
5	1	Academic	AHU	14	SE-AHU-014	1	UNS_1	Unscheduled	2017-11-13	UNS_1		1	34.0	Yes	1
6	1	Academic	AHU	18	SE-AHU-018	1	V1	Visit 1	2017-11-14	V1		1	36.0	Yes	1
7	1	Academic	AHU	22	SE-AHU-022	1	V1	Visit 1	2017-11-14	V1		1	39.0	Yes	1
8	1	Academic	AHU	23	SE-AHU-023	1	V1	Visit 1	2017-10-16	V1		1	27.0	Yes	1
9	1	Academic	AHU	23	SE-AHU-023	1	V3	Visit 3	2017-10-27	V4		1	33.0	Yes	1
10	1	Academic	AHU	24	SE-AHU-024	1	V1	Visit 1	2017-11-01	V1		1	33.0	Yes	1
11	1	Academic	AHU	24	SE-AHU-024	1	V3	Visit 3	2017-11-14	V4		1	39.0	Yes	1
12	1	Academic	AHU	32	SE-AHU-032	1	V1	Visit 1	2017-11-21	V1		1	44.0	Yes	1
13	1	Academic	AHU	34	SE-AHU-034	1	V1	Visit 1	2017-11-21	V1		1	46.0	Yes	1
14	1	Academic	AHU	36	SE-AHU-036	1	V1	Visit 1	2017-11-20	V1		1	44.0	Yes	1
15	1	Academic	AHU	43	SE-AHU-043	1	V1	Visit 1	2018-01-01	V1		1	51.0	Yes	1
16	1	Academic	AHU	44	SE-AHU-044	1	V1	Visit 1	2018-01-02	V1		1	51.0	Yes	1
17	1	Academic	AHU	50	SE-AHU-050	1	V1	Visit 1	2018-01-06	V1		1	55.0	Yes	1
18	1	Academic	AHU	73	SE-AHU-073	1	V1	Visit 1	2018-03-20	V1		1	57.0	Yes	1
19	1	Academic	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.)

Header rows, one row per subject	
Row 2: Identifier column	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 Id	Event name	Event date	Activity Id	Activity name	Form sequence number	Design version	Vital Signs done? - VS_YN	Vital Signs Code	VS_DATE	VS_NDrea	Heart rate	Body temperature	Systolic BP	Diastolic BP
1	Academic Hospital Uppsala	AHU	48	SE-AHU-048	V1	Visit 1	2018-01-01	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	V2	Visit 2	2018-01-05	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	V3	Visit 3	2018-01-06	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	V3	Visit 3	2018-01-07	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	V3	Visit 3	2018-01-08	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	V3	Visit 3	2018-01-09	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 Id	Event name	Event date	Activity Id	Activity name	Form sequence number	Design version	Collection Date and Time	Result	Low Normal	High Normal
3	Academic Hospital Uppsala	AHU	44	SE-AHU-044	V2	Visit 2	2018-01-08	V2		1	51.0	2018-01-08 00:00	4589	4000	8000
4	Academic Hospital Uppsala	AHU	44	SE-AHU-044	V2	Visit 2	2018-01-08	V2		2	51.0	2018-01-09 13:26	6987	5500	11000
5	Academic Hospital Uppsala	AHU	44	SE-AHU-044	V2	Visit 2	2018-01-08	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:

Visit 1

Demo: FormRepeatKey 1, SubjectFormSeqNo 1, OriginSubjectFormSeqNo 1, SourceSubjectFormSeqNo	DM <input type="checkbox"/>	CRA <input type="checkbox"/>	SDV <input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Demo: FormRepeatKey 2, SubjectFormSeqNo 2, OriginSubjectFormSeqNo 2, SourceSubjectFormSeqNo	DM <input type="checkbox"/>	CRA <input type="checkbox"/>	SDV <input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Demo: FormRepeatKey 3, SubjectFormSeqNo 3, OriginSubjectFormSeqNo 3, SourceSubjectFormSeqNo	DM <input type="checkbox"/>	CRA <input type="checkbox"/>	SDV <input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

+ Demo form

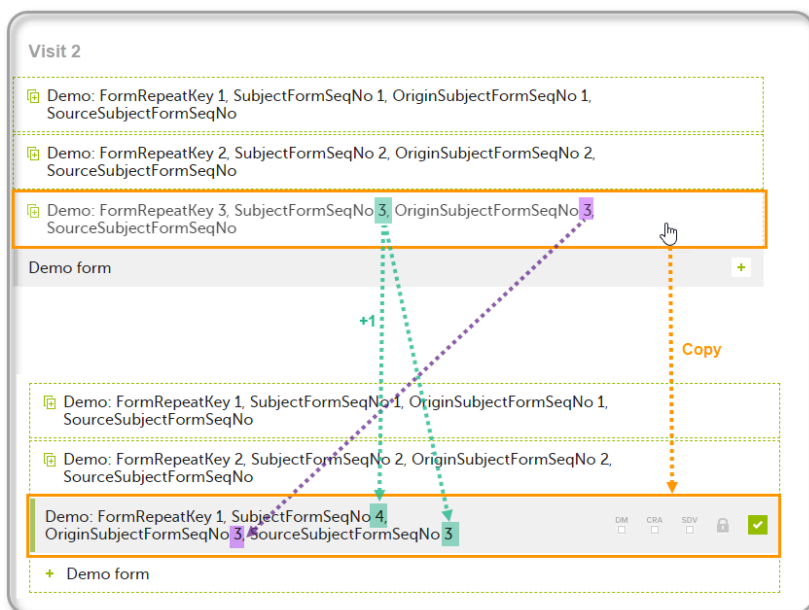
- 2 Initiate Visit 2. Demo form will be available to be initiated by copying data from one of the previously filled-in form instances within Visit 1, so all the three instances will be shown as ghost forms:

Visit 2

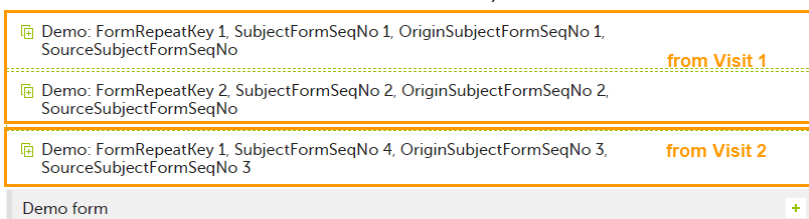
<input type="checkbox"/> Demo: FormRepeatKey 1, SubjectFormSeqNo 1, OriginSubjectFormSeqNo 1, SourceSubjectFormSeqNo
<input type="checkbox"/> Demo: FormRepeatKey 2, SubjectFormSeqNo 2, OriginSubjectFormSeqNo 2, SourceSubjectFormSeqNo
<input type="checkbox"/> Demo: FormRepeatKey 3, SubjectFormSeqNo 3, OriginSubjectFormSeqNo 3, SourceSubjectFormSeqNo

Demo form

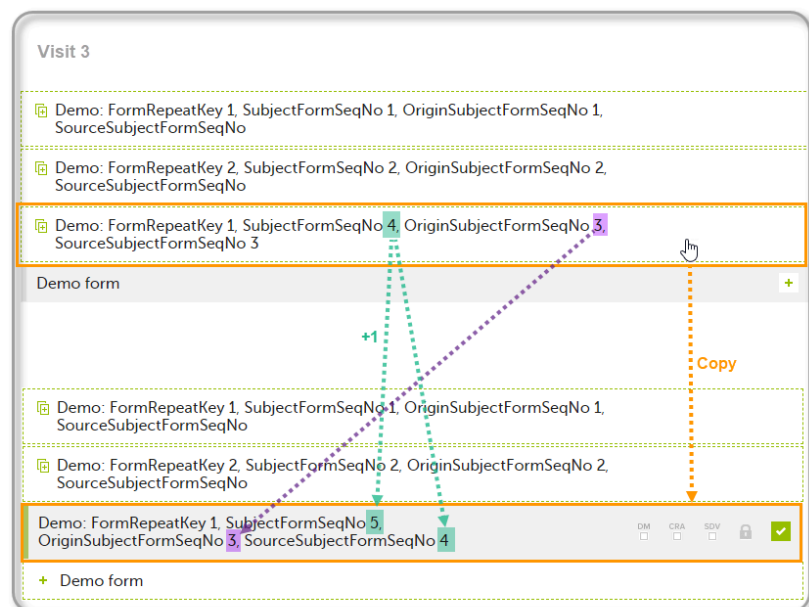
- 3 Create an instance of Demo form within Visit 2 by copying the data from the third instance of the form filled in within Visit 1. This will result in the new form instance getting the sequence numbers as illustrated below:



- 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 allows 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

Published by Viedoc System 2022-02-10

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### [3.4 Event summary page](#)

#### [3.4.1 The sort order of the forms](#)

---

## 1 Introduction

When choosing **PDF** as output format, you have the following options:

- **Exclude deleted subjects / events / forms** - if checked, the deleted subjects, events and forms will be excluded from the PDF export.
- **Create PDF/A compliant archive** - if checked, the PDF export output will be in a Portable Document Format Archive ([PDF/A](#)) compliant format. The PDF/A is a standardized format specialized for long-term preservation of electronic documents.
- **Embed complete fonts (no subsets)** - if checked, this will force embedding the complete fonts (not only subsets) into an archive and all the font subsets embedded in the PDF file will be replaced with fully embedded fonts.  
**Note!** Please note that this will lead to significantly larger file sizes.
- **FDA submission format (eCTD)** - if checked, the PDF export output will be structured according to the electronic Common Technical Document ([eCTD](#)) format specified by the Food and Drug Administration ([FDA](#)). The eCTD format provides a structure where the Case Report Forms ([CRFs](#)) are listed twice, ordered by event/workflow and ordered by domain.
- **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.

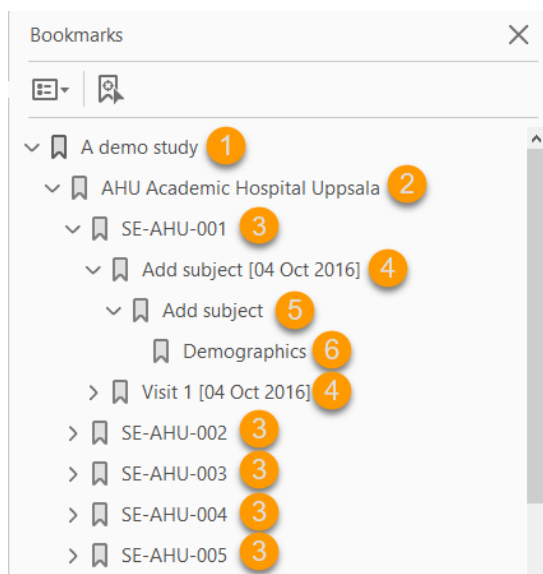
Name	Type
AHU Academic Hospital Uppsala	Adobe Acrobat Document
CUB Charite University Hospital Berlin	Adobe Acrobat Document
HUH Helsinki University Hospital	Adobe Acrobat Document
IMU Innsbruck Medical University	Adobe Acrobat Document
KCH King's College Hospital London	Adobe Acrobat Document
KIS Karolinska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

1. A study summary on the [first page](#).
2. A [site summary page](#).
3. One separate sub-section for each [subject](#) in the respective site.
4. For each subject, one sub-section for each event.
5. For each event, one sub-section for each activity.
6. For each activity, one sub-section for each form. The latest version of the form PDFs are included here. See also **Audit trail and Form History** section in [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
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<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

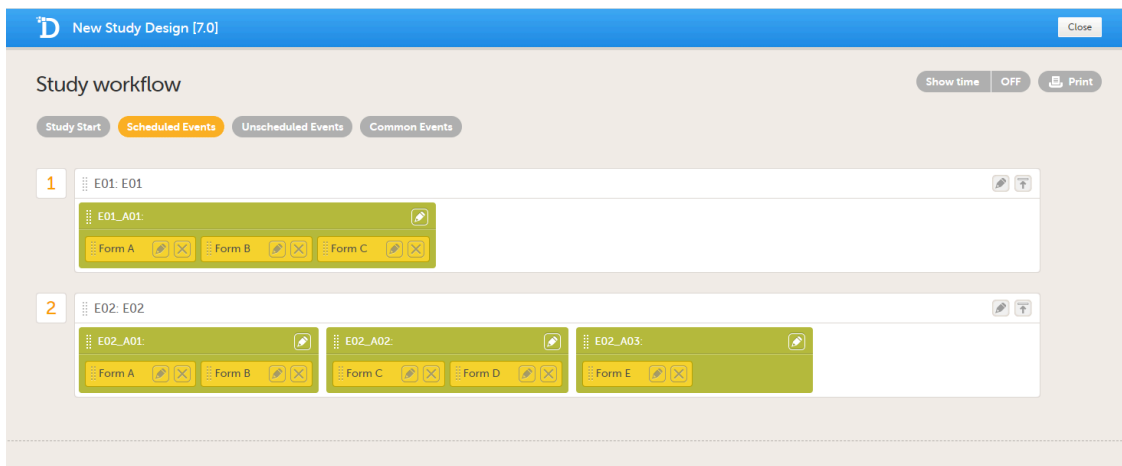
The forms in the PDF are sorted by these characteristics:

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



Medical coding in Excel export

# Medical coding in Excel export

Published by Viedoc System 2024-03-19

## [1. Introduction](#)

## [2. Medical coding information in Excel](#)

## [3. An example - WHODrug in Excel exported file](#)

### [3.1 When selecting Drug](#)

### [3.2 When selecting Preferred name](#)

## 1 Introduction

This lesson describes how the medical coding information is structured within an Excel file exported from Viedoc.

To include the medical coding information in the exported file, you need to select **Medical coding** under **Type of data** in the Data Export page:

**Type of data**

Signed data  Not Signed data  SDV performed or NA  SDV pending  Medical coding

Signed data  Not Signed data

SDV performed or NA  SDV pending

In addition to data, also include the following in the export (will not be included in Preview data)

Queries  Medical coding

Review status  Edit status

Event dates

Uploaded files

For general details about data export, see [Exporting data](#).

## 2 Medical coding information in Excel

For medical coding, in the Excel export output file, there is one sheet for each dictionary. Only values that have been coded will be present in the export:

Form Id	Form name	Form sequence number	Item Id	Item name	Term	Dictionary instance	Coding scope description	Coding scope level
FormId	FormName	FormSeq	ItemId	ItemName	Term	DictInstance	CodingScopeDesc	CodingScopeLevel
CM	Prior and Concomitant Medications	1	CMDRUG	Drug	Paracetamol	WHODrug, Version 180829	Concomitant medication	Item
CM	Prior and Concomitant Medications	1	CMDRUG	Drug	Paracetamol	WHODrug, Version 180829	Concomitant medication	Item
CM	Prior and Concomitant Medications	1	CMDRUG	Drug	Paracetamol	WHODrug, Version 180829	Concomitant medication	Item
CM	Prior and Concomitant Medications	1	CMDRUG	Drug	Cinnarizine	WHODrug, Version 180829	Concomitant medication	Item
CM	Prior and Concomitant Medications	1	CMDRUG	Drug	Cinnarizine	WHODrug, Version 180829	Concomitant medication	Item
CM	Prior and Concomitant Medications	1	CMDRUG	Drug	Montelukast	WHODrug, Version 180829	Concomitant medication	Item
CM	Prior and Concomitant Medications	1	CMDRUG	Drug	Humalog insulin	WHODrug, Version 180829	Concomitant medication	Item
CM	Prior and Concomitant Medications	1	CMDRUG	Drug	Paracetamol	WHODrug, Version 180829	Concomitant medication	Item
CM	Prior and Concomitant Medications	1	CMDRUG	Drug	Aspirin	WHODrug, Version 180829	Concomitant medication	Item

The columns provide information on the item that was coded, followed by the medical coding specific information, as listed in the following table:

Column name	Description
<b>Columns that identify the item</b>	
<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 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 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>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>Item Id</b>	The item ID, as set in the study design (in Viedoc Designer)

Column name	Description
<b>Item Name</b>	The item name, as set in the study design (in Viedoc Designer) and displayed in Viedoc Clinic
<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>Medical coding-specific information</b>	
<b>Term</b>	The coded term
<b>Dictionary instance</b>	The description of the dictionary instance, as set in Viedoc Admin when uploading the dictionary
<b>Coding scope description</b>	The coding scope description, as defined in Viedoc Designer
<b>Coding scope level</b>	The coding scope level, as defined in Viedoc Designer, can be one of the following: <ul style="list-style-type: none"> <li>▪ Event</li> <li>▪ Activity</li> <li>▪ Form</li> <li>▪ Item group</li> <li>▪ Item</li> </ul>
<b>Code sequence number</b>	A counter that identifies the code for those values with more than one code
<b>Approved by user</b>	The name and ID of the user who approved the items
<b>Approved on date (UTC)</b>	The date and time (UTC) when the item was approved
<b>Dictionary-specific information</b>	

Column name	Description		
<b>WHODrug:</b> <ul style="list-style-type: none"> <li>▪ DrugCode</li> <li>▪ DrugName</li> <li>▪ NameSpecifier</li> <li>▪ OldForm</li> <li>▪ Ingredients</li> <li>▪ ATCCodes</li> <li>▪ CountryCode</li> <li>▪ CountryName</li> <li>▪ MAH (MAH)</li> <li>▪ PharmForm</li> <li>▪ Strength</li> <li>▪ MedProdId</li> <li>▪ Generic</li> </ul>	<b>MedDRA:</b> <ul style="list-style-type: none"> <li>▪ soc_code</li> <li>▪ soc_name</li> <li>▪ soc_abbrev</li> <li>▪ hlgt_code</li> <li>▪ hlgt_name</li> <li>▪ hlt_code</li> <li>▪ hlt_name</li> <li>▪ pt_code</li> <li>▪ pt_name</li> <li>▪ pt_soc_code</li> </ul>	<b>ATC without DDD:</b> <ul style="list-style-type: none"> <li>▪ L1code</li> <li>▪ L1name</li> <li>▪ L2code</li> <li>▪ L2name</li> <li>▪ L3code</li> <li>▪ L3name</li> <li>▪ L4code</li> <li>▪ L4name</li> </ul>	<b>IDF:</b> <ul style="list-style-type: none"> <li>▪ L1 薬剤 コード</li> <li>▪ L1 薬剤 名</li> <li>▪ L1 薬剤 名カナ</li> <li>▪ L2 薬剤 コード</li> <li>▪ L2 薬剤 名</li> <li>▪ L2 薬剤 名カナ</li> <li>▪ L3 薬剤 コード</li> </ul>
<b>Interpretation</b>	The medical coder's interpretation of the applied coding value		
<b>Coded by user</b>	The name of the user who performed the coding, followed by the user ID in parentheses		
<b>Coded on date (UTC)</b>	The date and time when the coding was performed		
<b>Version</b>	The dictionary version		
<b>Dictionary-specific information</b>			

Column name	Description		
<b>WHODrug:</b> <ul style="list-style-type: none"> <li>▪ PreferredCode</li> <li>▪ PreferredName</li> </ul>	<b>MedDRA:</b> <ul style="list-style-type: none"> <li>▪ llt_code</li> <li>▪ llt_name</li> <li>▪ llt_currency</li> </ul>	<b>ATC without DDD:</b> <ul style="list-style-type: none"> <li>▪ L5Code</li> <li>▪ L5Name</li> </ul>	<b>IDF:</b> <ul style="list-style-type: none"> <li>▪ L3 薬剤名</li> <li>▪ L3 薬剤名カナ</li> <li>▪ L4 薬剤コード</li> <li>▪ L4 薬剤名</li> <li>▪ L4 薬剤名カナ</li> <li>▪ L5 薬剤コード</li> <li>▪ L5 薬剤名</li> <li>▪ L5 薬剤名カナ</li> <li>▪ L5 一般名</li> <li>▪ L5 一般名カナ</li> <li>▪ L5 使用区分1</li> <li>▪ L5 使用区分2</li> <li>▪ L5 基準名コード</li> <li>▪ L5 メーカーコード</li> <li>▪ L5 メーカーの略称</li> <li>▪ L5 剤形コード</li> <li>▪ L5 薬剤コード区分1</li> <li>▪ L5 メンテ年月</li> <li>▪ L6 薬剤コード</li> <li>▪ L6 薬剤名</li> <li>▪ L6 薬剤名カナ</li> <li>▪ L6 一般名</li> <li>▪ L6 一般名カナ</li> <li>▪ L6 使用区分1</li> <li>▪ L6 使用区分2</li> </ul>

Column name	Description		
			<ul style="list-style-type: none"> <li>▪ L6 基準名コード</li> <li>▪ L6 メーカーコード</li> <li>▪ L6 メーカーの略称</li> <li>▪ L6 剤形コード</li> <li>▪ L6 薬剤コード区分1</li> <li>▪ L6 メンテ年月</li> </ul>

### 3 An example - WHODrug in Excel exported file

This section illustrates an example of how the data coded using the World Health Organization Drug Dictionary ([WHO DD](#)) dictionary looks in the Excel export output.

There are two different use cases, depending on the which level of granularity is selected when applying the code in Viedoc Clinic:

#### 1. Drug (default)

#### 2. Preferred name

**Find and apply code**

WHODrug

Search options ▼

codeine 🔍

Pref 12818602001 Acetylsalicylic acid;Caffeine;Codeine phosphate 👁️ 2

Drug 12818602012 A. c. with codeine 👁️ 1

#### 3.1 When selecting Drug

The image below illustrates how the coded data looks in the export output, if the **Drug** is selected when applying the code in Viedoc Clinic.

When **Drug** is selected, the **Preferred code** and **Preferred name** come out in the export as well, in the last columns, as illustrated in the image.

**Find and apply code**

WHODrug

Search options

codeine

Pref 12818602001 Acetylsalicylic acid;Caffeine;Codeine phosphate

Drug 12818602012 A. c. with codeine

Spec

INGR Acetylsalicylic acid;Caffeine;Codeine phosphate

ATC N02AJ Opioids in combination with non-opioid analgesics

Applied code in Excel export output

	V	W	X	Y	Z	AA
1	DrugCode	DrugName	NameSpecifier	OldForm	Ingredients	ATCCodes
2	DrugCode	DrugName	NameSpecifier	OldForm	Ingredients	ATCCodes
3	12818602012	A. c. with codeine		N	Acetylsalicylic acid;Caffeine;Codeine phosphate	N02AJ Opioids in combination with non-opioid analgesics
4						
5						
6						
7						
8						
9						
10						
11						

AM	AN
Preferred Code	Preferred Name
PreferredCode	PreferredName
12818602001	Acetylsalicylic acid;Caffeine;Codeine phosphate

### 3.2 When selecting Preferred name

The image below illustrates how the coded data looks in the export output, if the **Preferred name** is selected when applying the code in Viedoc Clinic.

After the **Preferred name** is selected and the code is applied, for the respective coded item, the value of the **Preferred name** ends up in both **Drug** and **Pref** fields, in both Viedoc Clinic, as well as in the exported output.



## Find and apply code

WHODrug

Search options

codeine

Pref 12818602001 Acetylsalicylic acid;Caffeine;Codeine phosphate

Drug 12818602012 A. c. with codeine

Spec

INGR Acetylsalicylic acid;Caffeine;Codeine phosphate

ATC N02AJ Opioids in combination with non-opioid analgesics

Select Pref and apply code

## Find and apply code

WHODrug

Search options

Search

Pref 12818602001 Acetylsalicylic acid;Caffeine;Codeine phosphate

Drug 12818602001 Acetylsalicylic acid;Caffeine;Codeine phosphate

Spec

INGR Acetylsalicylic acid;Caffeine;Codeine phosphate

ATC N02AJ Opioids in combination with non-opioid analgesics

## Find and apply code

WHODrug

Search options ▾

Search

Pref

Drug

Spec

INGR

ATC

Applied code in Excel export output

	V	W	X	Y	Z	AA
1	DrugCode	DrugName	NameSpecifier	OldForm	Ingredients	ATCCodes
2	DrugCode	DrugName	NameSpecifier	OldForm	Ingredients	ATCCodes
3	12818602001	Acetylsalicylic acid;Caffeine;Codeine phosphate		N	Acetylsalicylic acid;Caffeine;Codeine phosphate	N02AJ Opioids in combination with non-opioid analgesics
4						

AM	AN
Preferred Code	Preferred Name
12818602001	Acetylsalicylic acid;Caffeine;Codeine phosphate



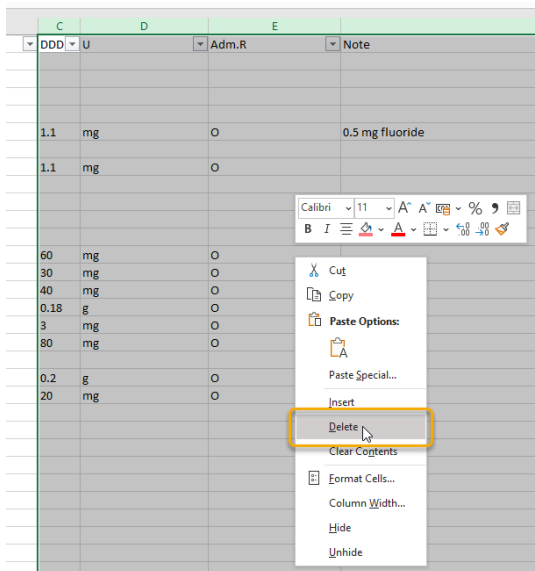
Converting an ATC dictionary from Excel format to ASCII format

# Converting an ATC dictionary from Excel format to ASCII format

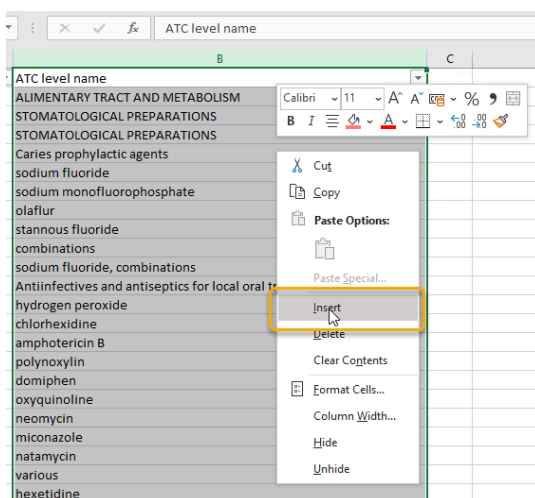
Published by Viedoc System 2022-02-10

To convert an Anatomic Therapeutic Chemical classification system ([ATC](#)) dictionary:

- 1 Open the `xlsx` file in Microsoft Excel.
- 2 If Defined Daily Dose (DDD) is included in the file (columns C, D, E, and F), delete these columns, as well as the note column if there is one.



- 3 Insert a new column B.



- 4 In cell B2, write a formula. To add a formula, start by typing an equal sign ( = ). Then Excel interprets the text in that cell as a formula (unless otherwise specified).

The formula will look different depending on the language of your Excel installation. These are some examples:

- English: =CONCAT(LEFT(CONCAT(A2;REPT(" ";5));4);" ";MID(CONCAT(A2;REPT(" ";20));5;6);C2)
- French: =CONCAT(GAUCHE(CONCAT(A2;REPT(" ";5));4);" ";STXT(CONCAT(A2;REPT(" ";20));5;6);C2)
- Spanish: =CONCAT(IZQUIERDA(CONCAT(A2;REPETIR(" ";5));4);" ";EXTRAE(CONCAT(A2;REPETIR(" ";20));5;6);C2)
- German: =TEXTKETTE(LINKS(TEXTKETTE(A2;WIEDERHOLEN(" ";5));4);" ";TEIL(TEXTKETTE(A2;WIEDERHOLEN(" ";20));5;6);C2)
- Swedish: =SAMMAN(VÄNSTER(SAMMAN(A2;REP(" ";5));4);" ";EXTTEXT(SAMMAN(A2;REP(" ";20));5;6);C2)

**Note!** Depending on the regional settings in your operating system, you might need to replace the semicolons with commas.

The screenshot shows an Excel spreadsheet with the following data:

ATC code	Column1	ATC level name
A	A	ALIMENTARY TRACT AND METABOLISM
A01	A01	STOMATOLOGICA STOMATOLOGICAL PREPARATIONS
A01A	A01A	STOMATOLOGIC STOMATOLOGICAL PREPARATIONS
A01AA	A01A A	Caries prophyla Caries prophylactic agents

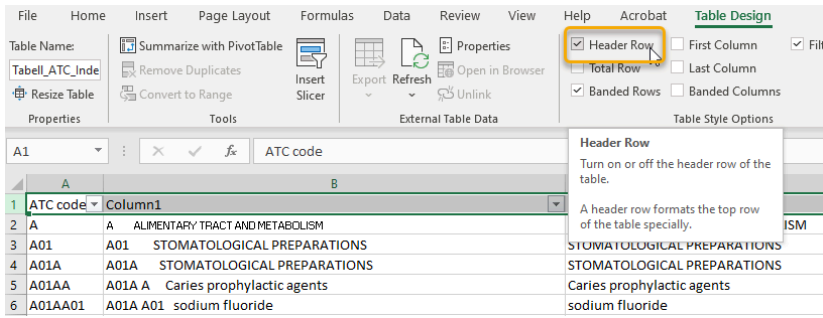
The formula does the following:

1. It takes the first four characters from column A (padded right with spaces unless the text is four characters long).
2. It adds one space character.
3. It adds characters 5, 6, and 7 from column A (padded right with spaces unless the text is seven characters long).
4. It adds three space characters.
5. It adds all of column C.

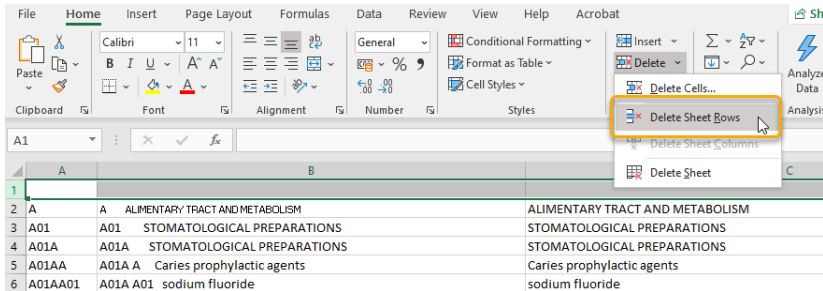
- 5 Fill all cells in the B column with the same formula, for example by dragging the small plus sign ( + ) downwards to cover the entire column.

The screenshot shows the same Excel spreadsheet as above, but now the B column is filled with the output of the formula. The output for each row is: "A ALIMENTARY TRACT AND METABOLISM", "A01 STOMATOLOGICA STOMATOLOGICAL PREPARATIONS", "A01A STOMATOLOGIC STOMATOLOGICAL PREPARATIONS", "A01AA Caries prophyla Caries prophylactic agents", and "A01AA01 Caries prophyla Caries prophylactic agents sodium fluoride". A small orange box highlights the plus sign in the bottom-right corner of the B column, indicating that the formula was dragged down to fill the cells.

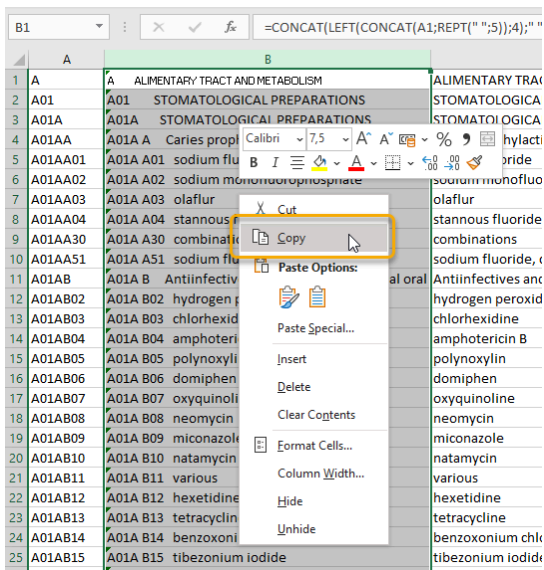
- 6 Remove row 1 (the header row). Do to this, you might first need to turn off the header row on the **Table Design** page.



Then you can delete the sheet row from the **Home** page.

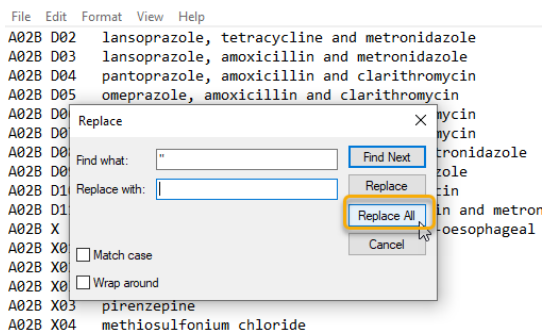


- 7 Select column B and copy it.



- 8 Paste the copied column into a raw text editor such as Windows Notepad. It is important to use an editor that does not add any formatting.

- 9 In the raw text editor, search for the quotation mark character ( " ) and remove any such occurrences.



10 If there are empty lines at the end of the file, remove them.

```
V10X X03 radium (223Ra) dichloride
V10X X04 lutetium (177Lu) oxodotreotide
V20      SURGICAL DRESSINGS
```



11 Save your file with an appropriate filename that reflects the [ATC](#) version and with the filename extension `.asc`.

12 Upload the file to Viedoc according to these instructions: [Creating a dictionary instance](#).



Medical coding for versions 4.79 and earlier

# Medical coding

Published by Viedoc System 2024-03-26

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## 1 Introduction

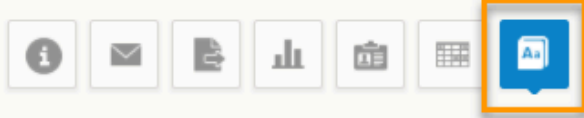
Viedoc Coder allows you to code data, such as Adverse Events, Medical History, and Concomitant Medications, in a standardized way. You can access Viedoc coder on the landing page.

The Viedoc Coder page displays metrics about coding that tell the user the number and percentage of items that have been coded and approved. There is one set of metrics for each coding scope. The metrics displayed are based on the data and sites that you have permission to view.

**Note!** You can only access Viedoc Coder if permission to view, perform, and/or approve medical coding is activated for your role. If you do not see the medical coding icon, you do not have a role with medical coding permissions.

# Demo Study

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



## Medical coding

[All sites](#) [Germany](#) [Sweden](#) [United States](#) [Japan](#)

### Concomitant Medication

#### CODED DATA



Latest action 2021-07-26 07:19 by Soff Ann

#### APPROVED CODING



[Open medical coding](#)

You can select to display the metrics of:

- All sites
- All sites in an individual country
- An individual site

## 2 The Viedoc Coder console in Viedoc Clinic

### 2.1 Overview of the medical coding console

To enter the medical coding console, click **Open Viedoc Coder** in the lower left corner of the coding scope.

Medical coding

[All sites](#) [Germany](#) [Sweden](#) [United States](#) [Japan](#)

### Concomitant Medication

CODED DATA	APPROVED CODING
30% 3 of 10 items	66% 2 of 3 coded data
Latest action 2021-06-24 09:30 by [redacted]	20% 2 of 10 all data

[Open medical coding](#)



The Viedoc Coder console opens in the same window:

1 Concomitant Medication 2 All countries 3 All sites

4 5 6 7

	Value	φ 1	φ 2	Code	
Uncoded items					
Coded items	Atorvastatin	Tablet	Oral	Amlodipini/Atorvastatin Teva	<input checked="" type="checkbox"/>
Approved items	ASA	Tablet	Oral	5 asa	<input checked="" type="checkbox"/>
All items					
3	DE-95-010	Paracetamol	Tablet	Oral	<input type="checkbox"/>
4	DE-95-013	paracetamol	Capsule	Oral	<input type="checkbox"/>
5	DE-95-031	paracetamol	Cream	Intraocular	<input type="checkbox"/>
6	DE-96-006	Ibuprofen	Tablet	Oral	<input checked="" type="checkbox"/>
7	DE-96-006	Paracetmol	Injection	Oral	<input type="checkbox"/>
8	DE-96-017	aspirin	Capsule	Nasal	<input type="checkbox"/>
9	DE-96-112	Ibuprofen	Tablet		<input type="checkbox"/>
10	US-30-025	Alvedon			<input type="checkbox"/>

Find and apply code

WHODrug

Search options

Search

Pref

Drug

INGR

ATC

GEN

Show variants >>

Apply to selected (0)

Add interpretation

Clear

Items to be coded / approved

Codes to be applied to the items

The Viedoc Coder console displays a table that lists all items to be coded in the **Values** column. You can view the corresponding form (Electronic Case Report Form ([eCRF](#))) of an item by clicking on the value.

On the Viedoc Coder console, you can:

1. Select the coding scope (that is, data) to be coded.
2. Select to display items from all countries or from an individual country.
3. Select to display items from all sites or from an individual site.
4. Select to display all uncoded (and disapproved) items, all coded items, all approved items, or all items.
5. Perform a text search among all values of the items.
6. If configured for your study, there can be additional columns included with supporting values for the coding, for example route, indication, or other.
7. Find and apply codes (see [Finding and applying a medical code](#)).

When applying codes, it is possible to:

- Add an interpretation - a comment or explanation of the value that you have assumed in order to code.
- Add multiple codes to one value.

See [Finding and applying a medical code](#).

## 2.2 What do the symbols and colors mean?

#	Subject ID	Value	Code	Approval	Apply
1	NL-VUA-018	Headache	Migraine headache	✓	<input checked="" type="checkbox"/>
2	SE-AHU-054	Fever and headache	1 Band-like headache 2 Fever	✗	<input type="checkbox"/>
3	SE-AHU-058	Allergic reaction, anaphylaxis	Allergy	✗	<input type="checkbox"/>
4	SE-AHU-059	Fever	Fever of unknown origin	✓	<input type="checkbox"/>
5	SE-AHU-062	Vertigo	Acute rotatory vertigo	✗	<input type="checkbox"/>
6	SE-AHU-063	Headache	Forehead headache	✗	<input type="checkbox"/>

On the Viedoc Coder console, you can find the following symbols:

1. The three horizontal lines is a filter function. Click the symbol to open a drop-down list with a search field and a list of selectable items.
2. A filter symbol indicates that a selection has been made and the column only displays your filtered items.
3. A numbered list in the code field means that there is more than one medical code applied to that value.
4. An orange pen icon in the value field, together with a light orange background in the code field, means that the value (form item) has been changed in Viedoc Clinic by the Investigator after the item was coded. The applied code may not be correct anymore and the item needs to be re-coded.
5. A clip icon in the code field means that an interpretation has been added. Move the mouse pointer over the clip icon to view the contents of the interpretation.
6. An activated tick mark indicates that the coding has been approved.
7. The checkbox is used to mark the values to which a selected code should be applied.
8. The white cross in a grey circle is used to delete the applied code.

## 3 Finding and applying a medical code

This section gives an example of medical coding of adverse events using the Medical Dictionary for Regulatory Activities ([MedDRA](#)) and an example of medical coding of concomitant medication using the World Health Organization Drug Dictionary ([WHO DD](#)). The coding procedure is similar even if you are using other types of dictionaries.

### 3.1 A use case for coding with the MedDRA dictionary

#### 3.1.1 Searching for a code

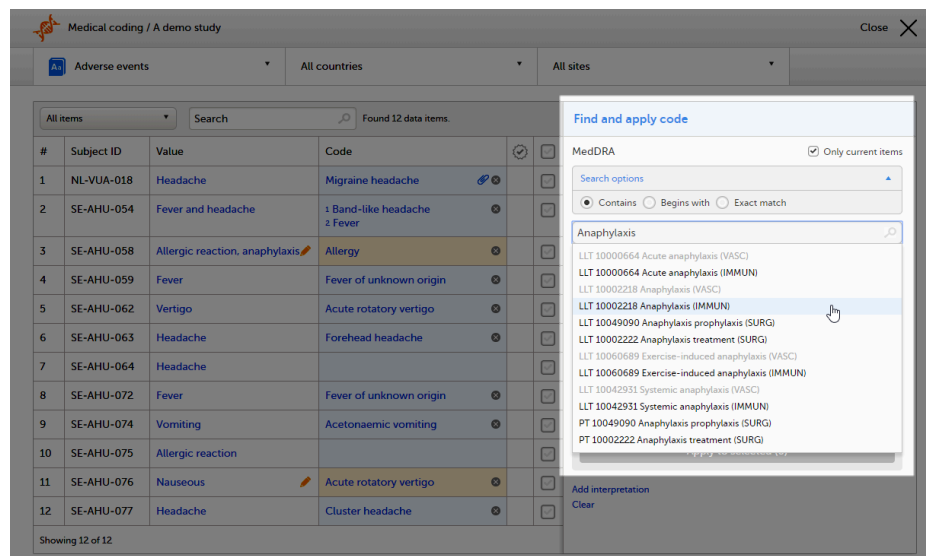
To find a code that you want to apply to a value, use the **Find and apply code** section.

There are three search options available:

- **Contains** - the search will return all entries that contain the text typed in the search field. This is the default option.
- **Begins with** - the search will return all entries that begin with the text typed in the search field.
- **Exact match** - the search will return all entries that exactly match the text typed in the search field.

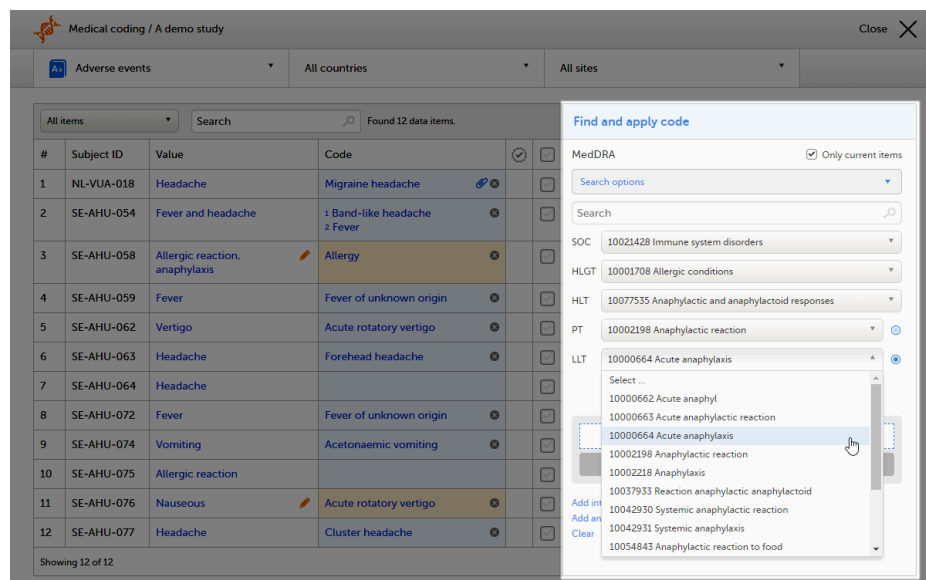
You can search for codes or (substrings of) terms in the **Search** field. Codes matching the term will be listed in a drop-down list that deploys from the **Search** field. If a term is linked to multiple System Organ Classes (SOCs), the code that links to the primary SOC is displayed in black, while the codes that link to secondary SOCs are displayed in grey.

Searching is not case sensitive. If you type in "Anaphylaxis", the search can return results such as "anaphylaxis" and "Anaphylaxis".



You can also search a code by selecting the System Organ Class (SOC), High Level Group Term (HLGT), High Level Term (HLT), Preferred Term (PT) and Low Level Term (LLT) using the drop-down lists below the search field.

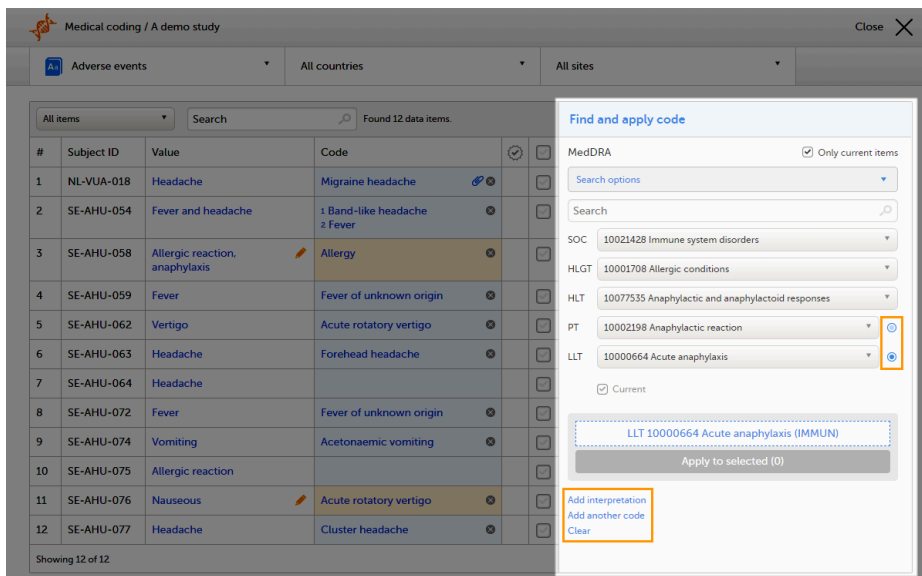
By default, the search returns low level terms (LLTs) that have the status 'current' in the [MedDRA](#) dictionary. It is possible to search among non-current MedDRA codes (that is, terms that are vague, ambiguous, truncated, abbreviated, out-dated, or misspelled and thus no longer used), by clearing the checkbox for **Only current items**.



### 3.1.2 Selecting a code

Select the code you would like to apply. The details of this code appear in the fields below the search field. The checkbox **Current** displays whether the selected Low Level Term (LLT) has the status *current* in the [MedDRA](#) dictionary or not.

You can select to use the Preferred Term (PT) or the Low Level Term (LLT) by clicking one of the blue radio buttons behind the **PT** and **LLT** fields, see image.

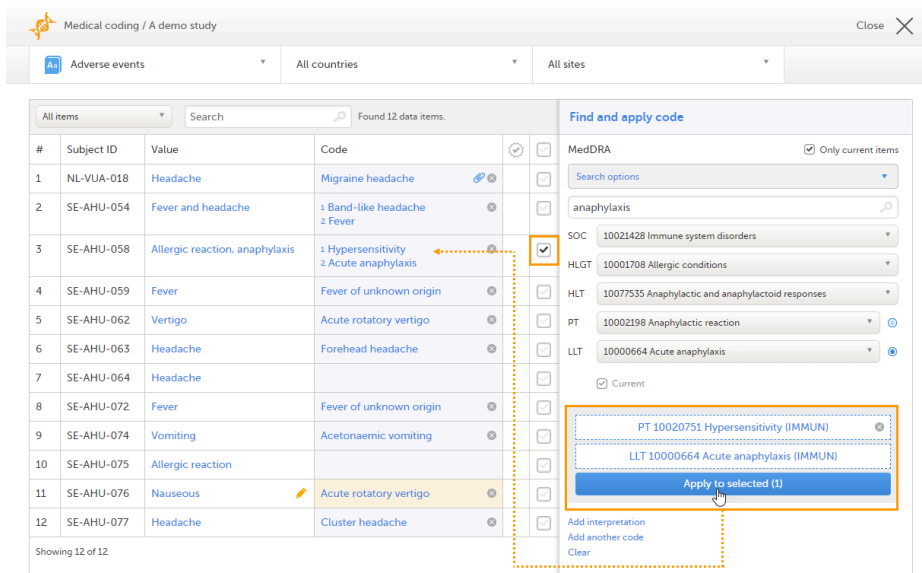


If you would like to add more than one code to the same field, click **Add another code**.  
 If you would like to add an interpretation, that is, a comment or explanation of the selected code, click **Add interpretation** and type your interpretation in the field.  
 You can reset your selections by clicking **Clear**.

**Tip!** If you want to apply a code that has been used before, click that code in the left side of the table. The **Find and apply code** section is then automatically populated with the selections for that code.

### 3.1.3 Applying a code

To apply a selected code, select the checkboxes for the value or values you want to apply that code to, and click **Apply to selected**. The selected code will be applied to the selected subjects and values. In the example in the image, we applied two codes to the value *Allergic reaction, anaphylaxis* for subject *SE-AHU-058*.



You can remove an applied code by clicking the cross icon to the right of the applied code.

## 3.2 A use case for coding with the WHO Drug Dictionary

### 3.2.1 Searching for a code

To find a code that you want to apply to a value, use the **Find and apply code** section.

When using the [WHO DD](#), you can select to search by:

- **Drugs** - to search for drugs by their name. This is the default option.

- **Active ingredients** - to search for drugs by their active ingredients. You can enter multiple ingredients in the search field, separated by ; and the search will return all drugs that contain all specified ingredients.

There are three search options available:

- **Contains** - the search will return all entries that contain the text typed in the search field. This is the default option.
- **Begins with** - the search will return all entries that begin with the text typed in the search field.
- **Exact match** - the search will return all entries that exactly match the text typed in the search field.

You can search for codes or (substrings of) terms in the **Search** field. Codes matching the term will be listed in a drop-down list that deploys from the **Search** field.

Searching is not case sensitive. If you type in "paRacetaMol", the search can return results such as "paracetamol" or "Paracetamol".

The number behind the entries in the list depicts the number of active ingredients. If you click that number, a pop-up appears that lists the active ingredients.

### 3.2.2 Selecting a code

Select the code (drug) you would like to apply. The details of this drug will appear in the fields below the search field.

In the [WHO DD](#), all drugs have a preferred drug as parent. You can select to use the Preferred drug (Pref) or the Drug name by clicking one of the blue radio buttons behind the **Pref** and **Drug** fields. Drug is the default.

**Note!** When exporting medical coding, both the preferred drug and drug name are included in the export (in separate columns). But if you select to apply **Pref** while coding, the preferred name ends up in both columns in the export. This is to provide consistency for the data managers, so that they only have to look in one column to find their data.

The screenshot shows a software interface for medical coding. On the left, a table lists 12 data items with columns for Subject ID, Value, and Code. On the right, a 'Find and apply code' panel is open. The panel includes a search field with 'paracetamol' entered, and several fields for drug details: Pref (12857102001 Codeine phosphate;Paracetamol), Drug (12857102040 Apo Paracetamol/Codeine), Spec, INGR (Codeine phosphate;Paracetamol), ATC (N02AJ Opioids in combination with non-opioid analgesics), GEN, CNTR (UNS Unspecified), MAH (Not specified), FORM (Unspecified), STR (Unspecified), and MPID (3960974). A button 'Apply to selected (0)' is visible. Below the panel, there are links for 'Add interpretation', 'Add another code', and 'Clear'.

#	Subject ID	Value	Code	
1	SE-AHU-014	Aspirin		
2	SE-AHU-058	Montelukast	Auro montelukast	
3	SE-AHU-059	Humalog insulin	Actrapid insulin novo	
4	SE-AHU-060	Paracetamol	Albert Heijn Paracetamol	
5	SE-AHU-061	Cinnarizine	Cinnarizine cox	
6	SE-AHU-062	Citalopram		
7	SE-AHU-063	Paracetamol	Coop vitality paracetamol	
8	SE-AHU-064	Paracetamol	Coop vitality paracetamol	
9	SE-AHU-071	Paracetamol		
10	SE-AHU-071	Cinnarizine	Cinnarizine cox	
11	SE-AHU-071	Amoxicillin		
12	SE-AHU-073	Omeprazol		

Click **Show variants** to display and specify variants of the selected code (drug), and use the drop-down lists to select Country (CNTR), Marketing Authorization Holder (MAH), Pharmaceutical Form (FORM), Strength (STR), or Medicinal Product ID (MPID), if applicable. Click **Hide variants** to hide the variants, see image.

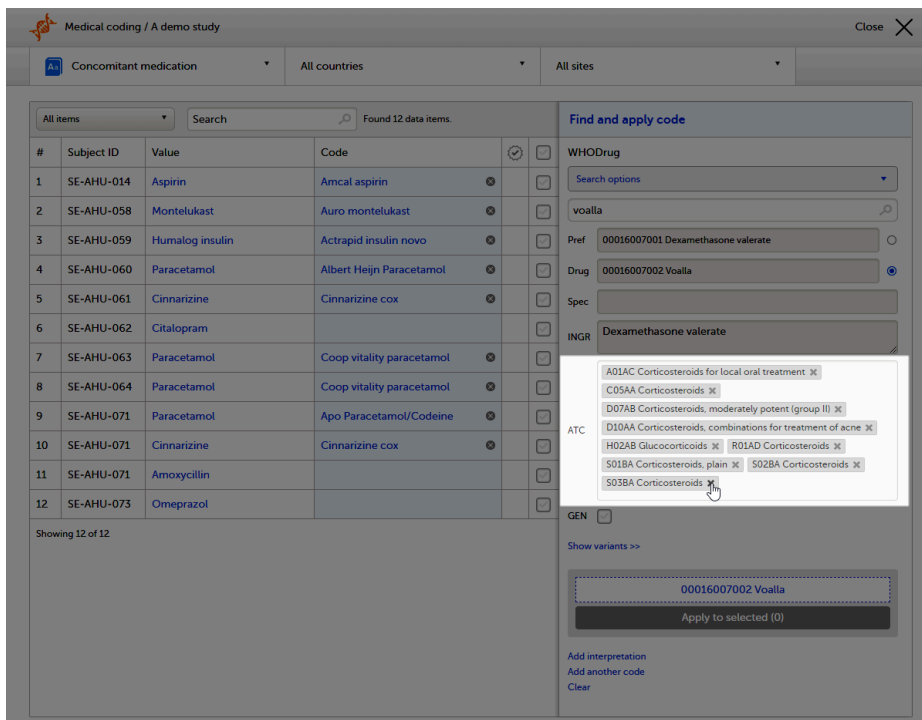
If you would like to add more than one code to the same field, click **Add another code**.

If you would like to add an interpretation, that is, a comment or explanation of the selected code, click **Add interpretation** and type your interpretation in the field.

You can reset your selections by clicking **Clear**.

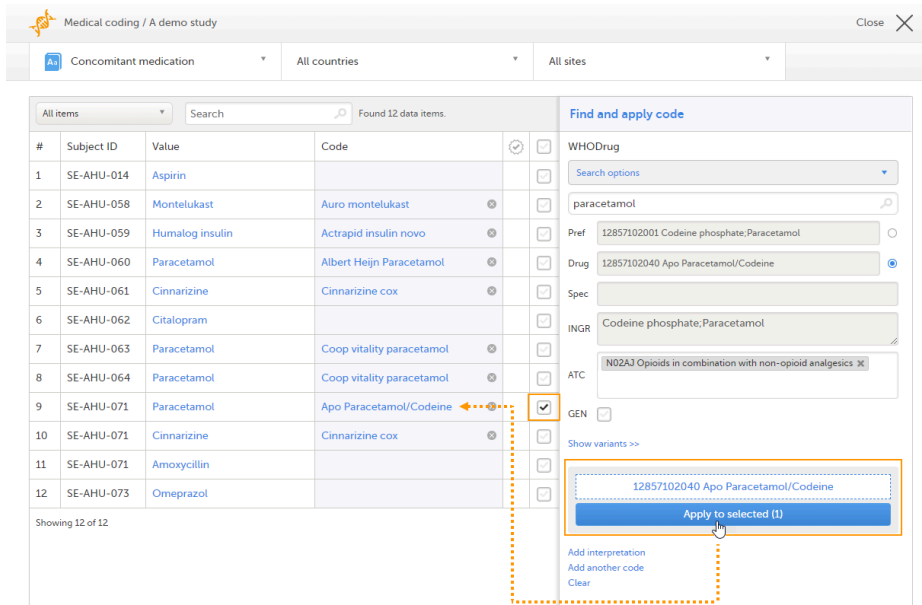
**Tip!** If you want to apply a code that has been used before, click that code in the left side of the table. The **Find and apply code** section is then automatically populated with the selections for that code..

If you selected a drug that carries multiple Anatomic Therapeutic Chemical Classification System ([ATC](#)) codes, all ATC codes will be displayed in the **ATC** field. You can define whether to include all ATC codes in the coding or only a selection. Click the cross to remove an ATC code, or click the **ATC** field to add ATC codes.



### 3.2.3 Applying a code

To apply a selected code, select the checkboxes for the value or values you want to apply that code to, and click **Apply to selected**. The selected code will be applied to the selected subjects and values.



You can remove an applied code by clicking the cross icon to the right of the applied code.

## 4 Approving the medical coding

After applying codes to the items, it is possible to approve/disapprove/reset the items as shown in the below table.

Action	Current state/found in list	New state/found in list
Approve	Coded  Disapproved	Approved items

Disapprove	Coded Approved	Uncoded items
Reset	Approved Disapproved	Coded items

**Tip!** To see all items in one list, select the filter **All items**.

To approve items that have been coded:

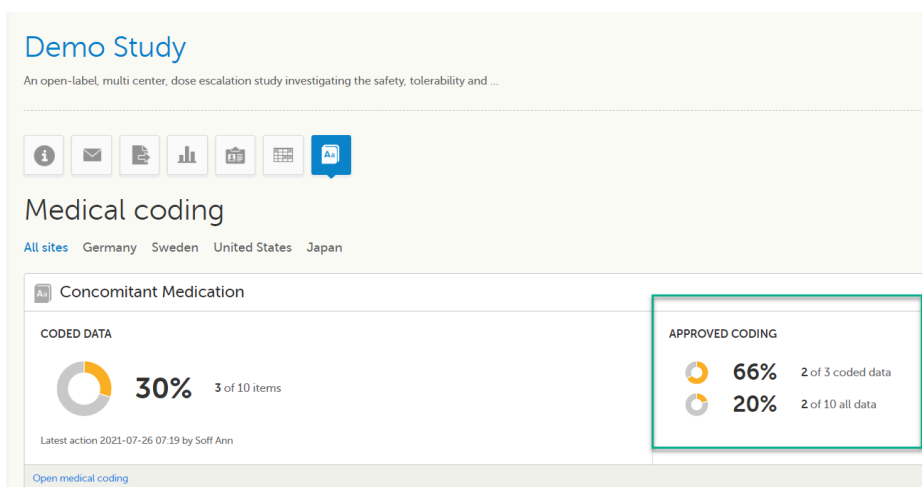
- 1 Select the item(s) that you want to approve and click **Approve selected**.

#	Subject ID	Value	⊗ 1	⊗ 2	Code	✓	☐
1	DE-95-006	Atorvastatin	Tablet	Oral	Amlodipin/Atorvastatin Teva	☐	☐
2	DE-95-008	ASA	Tablet	Oral	5 asa	✓	☐
3	DE-96-006	Ibuprofen	Tablet	Oral	Alben ibuprofen	☐	☐
4	DE-96-112	Ibuprofen	Tablet		Alben ibuprofen	☐	☐

- 2 The selected item(s) now disappear from the list and are found with the blue "Approved" symbol in the Approved items list.

#	Subject ID	Value	⊗ 1	⊗ 2	Code	✓	☐
1	DE-95-006	Atorvastatin	Tablet	Oral	Amlodipin/Atorvastatin Teva	✓	☐
2	DE-95-008	ASA	Tablet	Oral	5 asa	✓	☐
3	DE-96-006	Ibuprofen	Tablet	Oral	Alben ibuprofen	✓	☐

**Tip!** The metrics of the medical coding that have been approved can be seen on the landing page:



#### 4.1 Disapproving the medical coding

To disapprove items that have been coded:



- 1 Select the items that you want to disapprove and click **Disapprove selected**.

#	Subject ID	Value	⌀ 1	⌀ 2	Code	✓	☐
1	DE-95-006	Atorvastatin	Tablet	Oral	Amlodipin/Atorvastatin Teva	✕	☐
2	DE-95-008	ASA	Tablet	Oral	5 asa	✕	<input checked="" type="checkbox"/>
3	DE-96-006	Ibuprofen	Tablet	Oral	Alben ibuprofen	✕	☐
4	DE-96-112	Ibuprofen	Tablet		Alben ibuprofen	✕	☐

- 2 The selected item(s) now disappear from the list and are found with the red "Disapproved" symbol in the Uncoded items list for re-evaluation.

#	Subject ID	Value	⌀ 1	⌀ 2	Code	✓	☐
1	DE-95-008	ASA	Tablet	Oral	5 asa	✕	<input checked="" type="checkbox"/>
2	DE-95-010	Paracetamol	Tablet	Oral			☐
3	DE-95-013	paracetamol	Capsule	Oral			☐
4	DE-95-031	paracetamol	Cream	Intraocular			☐

## 4.2 Resetting the medical coding

To reset items that have been approved or disapproved:

- 1 Select the item(s) that you want to reset and click **Reset selected**.

#	Subject ID	Value	⌀ 1	⌀ 2	Code	✓	☐
1	DE-95-008	ASA	Tablet	Oral	5 asa	✕	<input checked="" type="checkbox"/>
2	DE-95-010	Paracetamol	Tablet	Oral			☐

- 2 The selected item(s) now disappear from the list and are found in the Coded items list without the approved/disapproved flag.

#	Subject ID	Value	⌀ 1	⌀ 2	Code	✓	☐
1	DE-95-008	ASA	Tablet	Oral	5 asa	✕	☐
2	DE-96-112	Ibuprofen	Tablet		Alben ibuprofen	✕	☐

## 5 Exporting the medical coding

It is possible to export medical coding using the export feature of Viedoc, see [Exporting data](#).

The screenshot shows the 'Data Export' interface. At the top, there are navigation icons for information, email, a blue chat icon, a calendar, a grid, and a document. Below the title 'Data Export', there are links for 'All sites', 'Sweden', 'Finland', 'Germany', 'Netherlands', 'Austria', 'Belgium', 'Italy', and 'United Kingdom'. The main content area is divided into several sections: 'Subjects to include (115)' with a dropdown for 'All subjects'; 'Events and time period' with a dropdown for 'All events'; 'Forms and items' with a dropdown for 'All forms'; and 'Type of data' which is highlighted with a blue border. The 'Type of data' section has a dropdown menu with options: 'Signed data', 'Not Signed data', 'SDV performed or NA', 'SDV pending', and 'Medical coding'. Below this, there are two columns of checkboxes: 'Signed data' and 'Not Signed data' (both checked), 'SDV performed or NA' (checked), and 'SDV pending' (checked). A section titled 'In addition to data, also include the following in the export (will not be included in Preview data)' contains checkboxes for 'Queries', 'Review status', 'Event dates', 'Uploaded files', 'Medical coding' (checked), and 'Edit status'. At the bottom, there is an 'Output format' section with a dropdown for 'Output to Excel', a dropdown for 'Group data by form', and a dropdown for '1 row per activity'. Finally, there are two buttons: 'Preview data' and 'Export data'.

To export the medical coding, select the checkbox in front of **Medical coding** in the **Type of data** section.

For more information about how medical coding is exported, see:

- [Medical coding in ODM export](#)
- [Medical coding in Excel export](#)

**Note!** You can only export medical coding if permission to export data is activated for your role. If you do not see the data export icon, you do not have a role with export permissions.



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](#).



Activate demo mode

## Activate demo mode

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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](#).

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