



# 3 Launching and Managing Studies

**For Information on Launching and Managing Studies, See the Following Sections:**

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## 3.1 User Access & Sharing

Once you have designed your study, you can share it with other users by assigning appropriate **User Types** and **User Roles**. These determine what each user can see and do within the Study Build System and study environments (Test and Production).

### User Types

Each user is assigned a **User Type** and a **User Role**. There are two **User Types** in OpenClinica:

<b>User Type</b>	<b>Description</b>
<b>Admin</b>	<ul style="list-style-type: none"><li>• Create Studies.</li><li>• View all studies.</li><li>• Assign their own access to any study.</li><li>• Access the <b>Administration</b> page.</li></ul>
<b>User</b>	<ul style="list-style-type: none"><li>• View and access only assigned studies or sites.</li></ul>

**User Type** defines global permissions—what tasks a user can perform across all studies. For example, only Admins can create studies or access the **Administration** page.

**User Role** determines study-level access and specific tasks the user can perform based on the assigned **User Type** in the **Test** or **Production** environments.

For example,

- A user might have **User Type: Admin** and **User Role: Data Manager**
- Another user might have **User Type: User** and **User Role: Investigator**

□ **Best Practice** The **Admin User Type** should be assigned sparingly because administrators have access to all studies. Most users should be assigned the **User Type** of **User**. **Site users** should never be assigned a **User Type** of **Admin**, as this would give them potential access to all data across all studies and sites in your **Test** and **Production** environments. Each user can have only one **User Type**, but can hold different **User Roles** in different studies or sites. Example: A user may have the **User** type, with the **Data Manager** role in one study and **Study Monitor** in another.

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# User Roles and Permissions

User Roles define what actions users can perform within a study or site. **Note:** Site-level users can only see Participants at the sites they are assigned to. They cannot see study-level Participants. Study-level users can see all Participants. Form-related permissions — such as viewing, entering, editing, clearing data, and managing queries — are configurable for each form via **Form Access Settings** (*Read Only, Review, Edit*).

## Legend

= Allowed

= Configurable by Form

Access

— = Not Allowed

## Participants

Action	Study-Level Role					Site-Level Role				
	Data Manager	Data Specialist	Data Entry	Monitor	Viewer	Data Manager	Investigator	CRC	Monitor	Viewer
Add/View	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> (View only)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> (View only)
Remove / Restore	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—	—
Reassign	<input type="checkbox"/>	—	—	—	—	<input type="checkbox"/>	—	—	—	—
Sign	—	<input type="checkbox"/>	—	—	—	—	<input type="checkbox"/>	—	—	—

## Events

Action	Study-Level Role					Site-Level Role				
	Data Manager	Data Specialist	Data Entry	Monitor	Viewer	Data Manager	Investigator	CRC	Monitor	Viewer
Schedule / Add	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—	—	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—	—
View	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Remove / Restore	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—	—	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—	—
Lock	<input type="checkbox"/>	—	—	—	—	<input type="checkbox"/>	—	—	—	—
Sign	<input type="checkbox"/>	<input type="checkbox"/>	—	—	—	—	<input type="checkbox"/>	—	—	—

## Forms

Action	Study-Level Role					Site-Level Role				
	Data Manager	Data Specialist	Data Entry	Monitor	Viewer	Data Manager	Investigator	CRC	Monitor	Viewer
View	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	default	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	default
Review	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	default	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	default	<input type="checkbox"/>
Enter / Edit	default	default	default	<input type="checkbox"/>	<input type="checkbox"/>	default	default	default	<input type="checkbox"/>	<input type="checkbox"/>
Clear	default	default	default	<input type="checkbox"/>	<input type="checkbox"/>	default	default	default	<input type="checkbox"/>	<input type="checkbox"/>
Remove / Restore	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—	—	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—	—

☐ Form actions depend on Form Access settings (Read Only, Review, or Edit). For more information, refer to [Managing Form Access and Permissions](#).

## Queries

Action	Study-Level Role					Site-Level Role				
	Data Manager	Data Specialist	Data Entry	Monitor	Viewer	Data Manager	Investigator	CRC	Monitor	Viewer
Add	default	default	default	default	☐	default	default	default	default	☐
Update	default	default	default	default	☐	default	default	default	default	☐
Close	☐	—	—	☐	—	☐	—	—	☐	—

☐ Form actions depend on Form Access settings (Read Only, Review, or Edit). For more information, refer to [Managing Form Access and Permissions](#).

## Verification & Data Extract

Action	Study-Level Role					Site-Level Role				
	Data Manager	Data Specialist	Data Entry	Monitor	Viewer	Data Manager	Investigator	CRC	Monitor	Viewer
Verify / Unverify Forms (SDV)	☐	—	—	☐	—	☐	—	—	☐	—
Extract Data	☐	☐	—	☐	—	☐	☐	—	☐	—
Import Data	☐	☐	☐	—	—	☐	☐	☐	—	—

## Study Management (when “Manage Study” is enabled)

**Data Manager only** can:

- Edit Study Settings
- Edit Study Design
- Publish Study
- Add Sites
- Invite Users

For more information on permissions available to each of the **OC4 User Roles**, refer to [User Matrix \(PDF\)](#).

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# Accessing the User Roles Screen

1. From the **My Studies** screen, click the **Settings** icon on the Study Card.
2. Select **User Roles**.

Role	Description	Access	Actions
<b>Clinical Research Coordinator</b> (Clinical Research Coordinator - SITE)	Site-level role with permission to create, view, edit, and remove records; add and update queries; import data.	Untagged Forms: Edit   Contact Forms: Edit   Admin: Review   Data Manager: Edit	Edit
<b>Data Entry Person</b> (Data Entry Person - STUDY)	Study-level role with permission to create, view, edit, and remove records; add and update queries; import data.	Untagged Forms: Edit   Show Reports Link	Edit
<b>Data Manager</b> (Data Manager - STUDY)	Study-level role with permission to configure the study, add sites, and invite users; create, view, edit, remove, and SDV records; add, update, and close queries; import and extract data.	Untagged Forms: Edit   Manage Study	Edit
<b>Data Specialist</b> (Data Specialist - STUDY)	Study-level role with permission to create, view, edit, remove, and sign records; add and update queries; import and extract data.	Untagged Forms: Edit	Edit
<b>Investigator</b> (Investigator - SITE)	Site-level role with permission to create, view, edit, remove, and sign records; add and update queries; import and extract data.	Untagged Forms: Edit   Contact Forms: Edit	Edit
<b>Site Data Manager</b> (Data Manager - SITE)	Site-level role with permission to create, view, edit, remove, and SDV records; add, update, and close queries; import and extract data.	Untagged Forms: Edit	Edit
<b>Site Monitor</b> (Monitor - SITE)	Site-level role with permission to view and SDV records; add, update, and close queries; extract data.	Untagged Forms: Review	Edit
<b>Site Viewer</b> (Viewer - SITE)	Site-level role with permission to view records; no permission to modify data, add or update queries, or extract data.	Untagged Forms: Read Only	Edit
<b>Study Monitor</b> (Monitor - STUDY)	Study-level role with permission to view and SDV records; add, update, and close queries; extract data.	Untagged Forms: Review	Edit
<b>Study Viewer</b> (Viewer - STUDY)	Study-level role with permission to view records; no permission to modify data, add or update queries, or extract data.	Untagged Forms: Read Only	Edit

The **Role** column displays the name of the role in bold, and the role it was based in in parenthesis. The **Access** column displays:

Permission Type	Description	Permissions Included	Permission Description	Available Background For	Color
Form Access	Permissions that govern access to form data. <ul style="list-style-type: none"> <li>• For more information on creating Manual Permission Tags, refer to <a href="#">Permission Tags</a>.</li> <li>• For more information on how form access permissions work, refer to <a href="#">Managing Form Access and Permissions</a></li> </ul>	Untagged	Forms that have not been configured with contact data or Manual Permission Tags. The default level of access is based on the role.	All users	white
		Contact	Forms that include contact data fields. Roles based on CRC and Investigator users are granted Edit access and all other user roles have No Access by default.		
General	General Permissions can be selected or deselected as needed to grant or restrict access to OpenClinica features for the role being configured.	[Manual Permission Tags] Manage Study	Forms that have been configured with a Manual Permission Tag in Study Designer. All Manual Permission Tags default to No Access. Grant access to Study Manager and Study Designer. All roles based on Data Manager will have this permission enabled by default.		bright green

Module-Specific	General Permissions can be selected or deselected as needed to grant or restrict access to OpenClinica features for the role being configured.	Show Reports Link	Selecting this tag gives users with this role the ability to view the Reports section of the Tasks menu (if Insight is active). Permission is disabled by default. <span style="color: red;">⚠</span> <b>Warning:</b> If the Insight module is deactivated and later reactivated, previous Show Reports Link configurations are not automatically retained.	All users	blue
	Permissions that govern access to the OpenClinica Code module. Only available if the module is active.	Coder Access	For information about Code permissions, refer to <a href="#">Code Activation and User Permissions</a>	All users on studies using Code	White Light Green
		Reviewer Access			

You can update these while creating or editing a user role.

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## Create a New User Role

1. On the **User Roles** screen, click the **Create** button.
2. In the **Create New Role** window, complete the following fields:
  1. Enter a **Name** for the new User Role.
  2. Select a standard **User Role** to base the new **User Role** on. (The base **User Role** provides core permissions of the custom **User Role**.)
  3. Enter a description for the **User Role**. (The default **User Role** description appears to the right/below the **User Role** in the **Based On** field.)
  4. Assign Permissions as needed
3. Click **Save**.

### Create New Role ✕

Name \*

Based On \*

Description \* 

New role based on the Data Specialist role.

**Form Permission Tags** **Access**

Untagged Forms	<input style="width: 100%;" type="text" value="Edit"/>
Contact Forms	<input style="width: 100%;" type="text" value="No Access"/>
Admin	<input style="width: 100%;" type="text" value="Review"/>
Data Manager	<input style="width: 100%;" type="text" value="No Access"/>

**Module Permissions**

Insight Module	Access
Show Reports Link	<input checked="" type="checkbox"/>

□ **Note:** Once saved, a **User Role** is available in both Test and Production environments for the current study.

## Edit a User Role

1. On the **User Roles** screen, click the **Edit** button to the right of the role you want to edit.
2. Update one or more of the following fields as needed:
  - **Name**
  - **Based On**
  - **Description**
  - **Permissions**
3. Click **Save**.





Edit Role
✕

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Name \*

Based On \*

Description \* 

Study-level role with permission to configure the study, add sites, and invite users; create, view, edit, remove, and SDV records; add, update, and close queries; import and extract data.

**Form Permission Tags** **Access**

Untagged Forms	<input style="width: 60px;" type="text" value="Edit"/>
Contact Forms	<input style="width: 60px;" type="text" value="No Access"/>
Admin	<input style="width: 60px;" type="text" value="No Access"/>
Data Manager	<input style="width: 60px;" type="text" value="No Access"/>

**General Permissions** **Access**

Manage Study	<input checked="" style="width: 20px;" type="checkbox"/>
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**Module Permissions**

Insight Module	Access
Show Reports Link	<input checked="" style="width: 20px;" type="checkbox"/>

## □ Important Considerations

- **User Roles** are defined per study.
- Custom **User Roles** have the same access as the **User Roles** they were based on by default. Specific permissions can be updated as defined above.
- Both Base User Roles and Custom User Roles can be edited.
- Permission updates take effect immediately after saving; republishing the study is not required.
- Changes to roles assigned to users, user role definitions, and permissions assigned to user roles take effect for users based on whether they are logged in at the time of the change.
  - Users not logged in will see updates upon their next login.
  - For users who are logged in at the time the change was made, the change will be active in their session when they do any of the following:
    - Clicking Go from Study Designer
    - Accessing Change Study in Study Runner
    - Navigate to any other Study Runner page (may not take effect for up to five

minutes from when the change was saved)

- Log Out and Log In
- Permissions sections within the Create and Edit Role screens are collapsible.
- If you need a user to have access in one environment but not another, assign a different User Role in each environment. For example, A user may be assigned Clinical Research Coordinator 1 in the Test environment and Clinical Research Coordinator 2 in the Production environment. In this setup, Clinical Research Coordinator 1 in Test environment might have access to a specific form, while Clinical Research Coordinator 2 in Production environment does not—depending on the permission tags applied to that form.

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## 3.1.1 Managing Form Access and Permissions

This page explains how access to study data works in OpenClinica 4. It describes which aspects of access are configurable and how these settings interact to determine what actions users can perform on each form.

Form permissions define how users interact with forms—whether they can **view**, **review**, or **edit** data—while user roles define broader privileges across the study.

Together, these settings ensure that each user has the appropriate level of access to perform their study tasks securely and efficiently.

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### Roles and Access Overview

#### Base Roles

Base roles define overall permissions and default form access for common study functions (for example, Clinical Research Coordinator, Site Monitor, Data Manager).

#### Custom Roles

Custom roles are derived from base roles to meet study-specific requirements.

For example, a custom CRC role may have reduced permissions compared to the standard CRC role. For details on creating and managing custom roles, refer to [User Roles](#).

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### Form Categories

Form categories define how OpenClinica applies access rules to different types of forms.

Each category—**Contact Forms**, **Tagged Forms**, and **Untagged Forms**—follows distinct rules for visibility, permissions, and storage. Understanding these categories helps ensure that each form's data is protected and accessible to the right users.

## Contact Forms

Contact forms contain specially designated Personally Identifiable Information (PII) data. A form is automatically treated as a **Contact Form** when it includes one or more fields configured to use the external value / bind::oc:external **contactdata**.

Forms can include both **contact** and **non-contact** data fields, but only fields using **contactdata** are treated as contact data for storage and access purposes.

For information on adding contact data fields to forms, refer to one of the following, depending on your method of form design:

- [Form Template](#)
- [Using Form Designer](#)

By default:

- **CRCs** and **Investigators** can edit contact forms.
- Other roles have **no access** unless additional permission tags are applied.

□ **Note:** To add or revoke access to contact form(s) for specific roles, see the [How Access to Contact Data Works](#) section below.

If a form contains both contact and non-contact fields, only the contact fields follow the special access and storage rules described in [Understanding Contact Data](#).

## Tagged Forms

Tagged forms are forms with a manual permission tag applied in *Study Designer*.

These tags allow study designers to grant or restrict form access for specific roles.

For example, you can:

- Hide a form from a particular role by setting it to **No Access**.
- Grant **Read-only**, **Review**, or **Edit** access to other roles.

Access to tagged forms must be explicitly granted; as they are set to **No Access** by default.

For information about how to create manual permissions tags in *Study Designer*, refer to [Permission Tags](#).

## Untagged Forms

Untagged forms are study forms that neither contain specially designated Personally Identifiable Information (PII) data nor have manual permission tags applied.

Default access is based on the user's base role but can be configured to one of the following levels: **Read-only**, **Review**, or **Edit**.

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## Access Levels

Different **access levels** are available depending on the **type of form**—for example, Contact Forms, Tagged Forms, or Untagged Forms.

These access levels determine what a user can do with each form, such as viewing, reviewing, or editing data.

Access Level	Description	Access Level Availability by Form Type		
		Contact Forms	Tagged Forms	Untagged Forms
<b>Read-only</b>	User can view form data but cannot edit or create queries.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Review</b>	User can view data and create or update queries, but not edit data.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Edit</b>	User can enter or update form data.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>No Access</b>	User cannot view or open the form.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### Notes:

While adding and updating queries is governed by your form access level, access to close queries is determined by your **role permissions** in addition to form access level. Closing queries is only possible in **Review** and **Edit** modes for roles that have this ability.

- For example, Monitors and Data Managers with **Review** or **Edit** access can close queries, while non-DM / non-Monitor users with **Review** or **Edit** access can only update them.
- **Important:** If a Monitor or DM does not have access to a form, the query will not be visible, and therefore they will not be able to close it.

Similarly, SDV access is determined by your **role permissions** in addition to form access level. SDV is only possible in **Read-only**, **Review**, and **Edit** modes for roles that have this ability.

Only form data access is configurable through this feature—other actions such as viewing or editing contact data outside of forms, adding participants, scheduling events, and removing records remain controlled by the role definition.

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## How Access to Contact Data Works

Access to contact data is intentionally limited and controlled through a combination of **role permissions** and **form-level tags**.

### Default Access

By default:

- **CRCs** and **Investigators** (site-level users) can view and edit contact data entered directly in the system.
- **All other users** (including both site- and study-level users) do **not** have access.

- These defaults can be further refined by applying manual permission tags and updating form-level access settings.

## Adjusting Access with Permission Tags

Use Manual Permission Tags to add or revoke access to contact form(s) for specific roles:

To adjust access:

1. Apply a Manual Permission Tag to the contact form in **Study Designer**.
2. Set the desired access level in User Role configuration: **Read-only**, **Review**, **Edit**, or **No Access**.

### □ Example Scenarios

- **Restricting access:**

A CRC user is responsible for completing certain study forms but should not have access to contact data.

- Create a custom role based on the CRC base role.
- Apply a Manual Permission Tag to a Contact Form in Study Designer and set the CRC role access level to No Access to prevent users with that role from opening contact forms.

- **Granting access:**

Monitor users need to view contact forms to perform their study duties.

- Apply a Manual Permission Tag to a Contact Form and set the Monitor role access level to **Read-only** or **Review**, depending on the level of access required.

□ **Important:** If a form is both a Contact Form and has a manual permission tag, the **manual tag's access level takes precedence**.

### □ Before Publishing a Permission Tag:

- **Confirm Tag Settings:** Verify the tag's configuration to prevent unintentionally granting or denying access.
- **Check User Roles:** Review the **User Role** screen to ensure no users have been inadvertently granted or denied access to the form.

□ **Tip:** Always double-check both tag settings and user roles to maintain accurate access control for all forms.

## How Contact Data Is Displayed in Study Runner when Manual Tags Used

To protect participant privacy, contact data is visible only where appropriate and is masked or excluded in other views. Manual permission tags override default access to **Contact Forms**, but do not necessarily override access to **contact data as a whole**.

The table below summarizes where contact data may appear in the system, how visibility of contact forms is affected by manual permission settings, and any exceptions or special considerations for each area.

□ **Note:** For more information about the differences between contact data and contact forms, refer

to [Contact Data vs. Contact Form](#).

Area	Contact Data vs Form	Manual Tag: No Access	Manual Tag: Access	Notes
<b>Participant Matrix - Single Event View</b>	Contact Data	N/A	N/A	N/A
	Contact Form	<input type="checkbox"/> No	<input type="checkbox"/> Yes	When a user has no access to a contact form via manual permissions, they will see the form status icon in the Participant Matrix Single Event View, but not be able to view / edit the form.
<b>Participant Details Page - General Information section</b>	Contact Data	<input type="checkbox"/> CRC/ Investigator	<input type="checkbox"/> CRC/ Investigator	Certain contact information (for example, Email, Mobile) may display based on study configuration for <b>CRCs</b> and <b>Investigators</b> only. This cannot be overridden by manual permission tags.
	Contact Form	N/A	N/A	N/A
<b>Participant Details Page - Visits Section</b>	Contact Data	<input type="checkbox"/> No	<input type="checkbox"/> Yes	Visible within form for users with access.
	Contact Form	<input type="checkbox"/> No	<input type="checkbox"/> Yes	Form cards are visible and forms are available to open when the user has read-only, review or edit access.
<b>Queries Page / SDV Page</b>	Contact Data	<input type="checkbox"/> No	<input type="checkbox"/> No	Contact data cannot be queried or source data verified, and therefore is not present.
	Contact Form	<input type="checkbox"/> No	<input type="checkbox"/> Yes	Visible if access granted via manual permission tag.
<b>PDF Casebooks</b>	Contact Data	<input type="checkbox"/> No	<input type="checkbox"/> No	Contact data is present in the form details but <b>masked</b> for privacy for all users, regardless of form permissions.
	Contact Form	<input type="checkbox"/> No	<input type="checkbox"/> Yes	Form data will be present if the user has access to the form via manual permission tag.
<b>Clinical Data Extracts and ODM-XML/JSON Casebooks</b>	Contact Data	<input type="checkbox"/> No	<input type="checkbox"/> No	Contact data is present in the participant audit details, but <b>masked</b> for privacy, regardless of form permissions.
	Contact Form	<input type="checkbox"/> No	<input type="checkbox"/> Yes	Form data will be present if the user has access to the form via manual permission tag.
<b>Clinical Data API</b>	Contact Data	<input type="checkbox"/> No	<input type="checkbox"/> No	If audit data is included in the API response, the contact data is present but <b>masked</b> for privacy, regardless of form permissions. <input type="checkbox"/> <b>Note:</b> Contact data is available through the Contact Data API only to CRCs and Investigators. For more information, refer to <a href="#">Retrieve Participant Contact Information</a> .
	Contact Form	<input type="checkbox"/> No	<input type="checkbox"/> Yes	Form data will be present if the user has access to the form via manual permission tag.

<b>Participant Audit Log</b>	Contact Data	<input type="checkbox"/> CRC/ Investigator Only	<input type="checkbox"/> CRC/ Investigator Only	Visible only to <b>CRCs</b> and <b>Investigators</b> in the participant section. Masked for all other users, regardless of form permissions.
	Contact Form	<input type="checkbox"/> No	<input type="checkbox"/> Yes	Form data will be present if the user has access to the form via manual permission tag.
<b>Consent</b>	Contact Data	<input type="checkbox"/> No	<input type="checkbox"/> Yes	Available to view when the user has read only, review or edit access via manual permission tag.
	Contact Form	<input type="checkbox"/> No	<input type="checkbox"/> Yes	Available to view when the user has read only, review or edit access via manual permission tag.
	Attestation	<input type="checkbox"/> No	<input type="checkbox"/> CRC/ Investigator Only	Contact data visible only to <b>CRCs</b> and <b>Investigators</b> . Masked for all other users with access.
<b>Insight</b>	Contact Data	<input type="checkbox"/> No	<input type="checkbox"/> No	Contact data is not passed to Insight.
	Contact Form - RLS enabled	<input type="checkbox"/> No	<input type="checkbox"/> Yes	Form data will be visible in Insight (and controlled via manual permission tag if RLS [row-level security permission syncing] is enabled).
	Contact Form - No RLS	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	Form data will be visible in Insight if RLS (row-level security permission syncing) is not enabled since permissions are managed separately in Insight in that case.

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## Security and Privacy Safeguards

- **Icons and Visual Indicators**

Contact forms display a contact data icon, and tagged forms display a permission tag icon. These help you identify sensitive forms at a glance.

- **Data Masking**

Contact data is always masked in exports (ODM XML, ODM JSON, and PDF Casebooks).

- **Audit Logs**

Only CRCs and Investigators can view contact data in the participant section of the audit log. Other users see masked values, including when audit data is exported.

- **Role Reference**

The Contact Form Edit privilege is displayed on the **User Roles** page for transparency.

## 3.1.2 Using Multifactor Authentication


You can enable multi-factor authentication (MFA) for your OpenClinica domain by contacting the OpenClinica Customer Service team.

**Note:** MFA is an optional security feature. It is only required if it has been enabled for your OpenClinica domain.

When you enable multi-factor authentication, users are prompted to:

1. Download either the **FreeOTP** app or the **Google Authenticator** app to your smartphone.
2. Scan a barcode.
3. Enter the access code from their device.

### Initial User Sign-up:




**You are required to set-up multi-factor authentication.**

This extra security measure keeps your account safe if someone discovers your username and password. To get started, please follow the steps below. Then, each time you log in you will need to access the authentication app and enter the code it displays.

**Step 1:** Install one of the following applications on your mobile device:

- Google Authenticator (recommended) - (Android - iOS)
- FreeOTP - (Android - iOS)

**Step 2:** Open the application and scan the barcode:



[Unable to scan?](#)

**Step 3:** Enter the one-time code provided by the application in the box below and click Log In to finish the setup.

[LOG IN >](#)

### Subsequent Logins:



Use your mobile device to open the authentication app that you previously configured to access this site and enter the code it displays.

CANCEL

LOG IN >

**Note:** Once you have enabled multi-factor authentication, you no longer need to scan a barcode. Only username, password, and an access code are required to sign in. The barcode should be treated as your password and should not be shared with anyone (including via screenshare).

### If This Feature is Enabled:

- All Study and Site Users are required to login with username, password, and an additional code.
- **Data Specialists** and **Investigators** will still sign participant records with only their username and password.
- Participant users logging into **Participate** are still only required to enter access codes.
- You cannot enable multi-factor authentication for a specific study, site, or user. It must be enabled per OpenClinica domain.

### Additional Information:

#### **There is no link between a user's authenticator app/device and the authentication server:**

Authenticator apps do not communicate with a server in any capacity. If a user deletes an MFA entry in their app, the server is not informed in any way and the user will still be expected to enter their One Time Password (OTP) upon login.

**Troubleshoot syncing the device clock to the server time:** We suggest the user compare their MFA device time to something official (e.g. <https://www.time.gov/>) - ensure that the users understand that MFA is sensitive down to the second. Some mobile devices fetch the time from their local Wi-Fi device and may be inaccurate.

**If a user loses their MFA device or authenticator entries:** they will have to make a request to their OpenClinica administrators to reset their MFA credentials, which will prompt them to re-configure MFA and give them a new QR code to scan.

**Note:** Our current implementation of MFA/OTP requires a second device such as a phone or tablet running iOS or Android and using one of the apps listed above.

## 3.1.3 Publish History

The **Share** screen tracks the publication history for each environment (**Test** and **Production**). Scroll to the bottom of the **Share** screen to see the publication history.

### To View a Previously Published Version of the Study:

Click the **View Study Design** link to the right of the version you'd like to view.

Revision	User	Date (UTC)	
4	Kate Lambert	09-Jul-2024 16:23	<a href="#">View Study Design</a>
3	Kate Lambert	09-Jul-2024 15:37	<a href="#">View Study Design</a>
2	Kate Lambert	06-Jun-2024 13:41	<a href="#">View Study Design</a>
1	Kate Lambert	05-Jun-2024 17:10	<a href="#">View Study Design</a>

A read-only version of the previously published study design displays:

The screenshot displays the OpenClinica interface for a study named 'Kate\_New\_Study'. The top navigation bar includes the OpenClinica logo, a status message 'Status: Not yet published to Production Environment | Return To My Studies', and the user's email 'klambert@openclinica.com'. Below the navigation bar, a yellow banner states: 'You are viewing a read-only copy of Revision 70 published to Test Environment on 01-Nov-2024 15:17. View current.' The main content area is organized into five columns: 'Screening', 'Daily', 'Treatment', 'Follow-Up', and 'Adverse Events'. Each column contains a list of items with icons for editing or deleting. The 'Screening' column has 'PublicURL'. The 'Daily' column has 'Daily Data', 'Surgical Implantation', 'No SDV', 'All SDV Required', and 'All SDV Optional'. The 'Treatment' column has 'Pre-Treatment Evaluation', 'Treatment Notification', 'Post-Treatment Evaluation', 'Vital Signs', 'Pathology', and 'Labs'. The 'Follow-Up' column has 'Follow-Up', 'Vital Signs', 'Labs', 'Validated', and 'Physical Exam'. The 'Adverse Events' column has 'Adverse Events'. On the right side, there is a sidebar with 'Members' (showing 'K' and 'P'), 'Permission Tags' (with a 'no show' button), 'Labels' (with color-coded boxes), 'Filter Activity' (with start and end date/time fields), and 'Activities (filtered)' (showing a list of activities with user avatars and timestamps).

Though no changes can be made to this version of the study, you can:

- View form and event settings
- Download form versions,
- Preview forms

etc.

The header clearly indicates this is a read-only version, and includes a link to quickly access the current version of the study, which is fully editable.

**Note:** Some Form attributes (checklists, tags, and labels) show the values that they have in the current design, regardless of their state in the previously published version. In the **Test** environment, if a Form version was overwritten after a previous publication, only the newest version of that Form is available for preview and download. This is not a concern in the **Production** environment, since Form versions cannot be overwritten.

## 3.1.4 Editing Study Settings

### To Edit Study Settings:

1. To the right of **Study Settings**, click **Edit**.
  - a. The Study ID field has a limit of 30 characters.
2. Edit the study settings as needed, and click **Save**.

**Note:** The changes take effect immediately in both the **Test** and **Production** environments for that study.

The screenshot shows the OpenClinica interface with a modal dialog titled "Study Properties" open over the "Study Settings" page. The dialog contains the following fields and values:

Field	Value
ID *	MigraineStudy
Name *	The Migraine Study
Description *	This study is to evaluate a new migraine medication.
Type *	Interventional
Phase *	Phase I
Expected Number of Participants *	100
Expected Start Date *	13-Jan-2021
Expected End Date *	23-Dec-2022

Additional options in the dialog include a checkbox for "Disable adding new participants when expected number is reached" which is currently unchecked. The dialog has "Cancel" and "Save" buttons at the bottom right.

### Adding and Editing Participant IDs

Participant IDs can be created with:

- **Manual Entry:** The user must enter the ID for each Participant.
- **System-generated:** The system will auto-generate the ID based on an ID Template that you specify.

### To Change the Method of Creation to Allow Automatic Entry:

1. From the **My Studies** screen, click the **Settings (gear)** icon under the study name, and select **Settings**.
2. Click the **Edit** link next to the **Participant ID Settings** header.

3. Click the radio button next to **System-generated**.

**Note:** If **Method of Creation** is set to **System-generated**, only Data Managers can edit the Participant ID. Data Managers can always edit IDs, even ones that are system-generated.

Participant ID Settings

Method of Creation \*  Manual Entry  System-generated

ID Template \*

[View Examples](#)

Cancel Save

## System Generated IDs

If you choose **System-generated**, you must specify the template for the system-generated ID.

**Example 1:** `${siteId}-${(siteParticipantCount+1)?string['000']}`

**Example 2:** `${(helper.random(5))?string['00000']}`

<b>Optional</b> Unique site ID for the current site where the Participant is being added.	<b>Optional</b> A static dash (-) character. Can be replaced by different character(s) or removed.	<b>Required</b> Must use either the Participant Count Method or the Random Number Method.  Participant Count Method adds 1 to the current count of Participants. The number can be modified to change the starting ID (e.g. +101 would generate 101, 102, 103, etc.)  Random Number Method uses a number from 1-9 to determine the number of digits in the generated ID (including leading zeros).	<b>Optional</b> Adds leading zeros to the result value (up to the number of digits indicated by the number of zeros).  If using Random Number Method, the number of zeros must be the same as the number of digits indicated by the random number.
--	---	---	---

## You Can Generate Participant IDs by the Following Methods:

- **The Participant Count Method:** Generate Participant IDs sequentially.
- **The Random Number Method:** Generate Participant IDs using random numbers.

## You Can Build Your ID Template Using One or More of the Following Components:

1. **`\${siteId}`:** The unique identifier for the site the Participant is being added to.
2. **`\${siteParticipantCount}`:** The current number of Participants at the site. This is generally used like **`\${(siteParticipantCount+1)}`** to have the ID increment the Participant count for each new Participant added.
3. **`\${helper.random(n)}`:** Generates a random number with up to n digits each time a

Participant ID is generated.

4. **?string[000]**: Added to the resulting values to pad them with leading zeros to equal the number of digits specified, for example, **\${(siteParticipantCount+1)?string[000]}** or **\$(helper.random(5)?string[00000])**.
5. Prefixes, suffixes, separators - Include other text (such as - or a Study-specific prefix) to include standard content in each ID.

**Note:** Each ID Template must include #2 or #3.

**Examples:** The Participant Count Method template, **\${siteId}-\${(siteParticipantCount+1)?string[000]}**, for site University Hospital (**Site ID = UH**) would produce the IDs, **UH-001, UH-002, UH-003**, etc. For site Central Hospital (**Site ID = CH**) would produce **CH-001, CH-002, CH-003**, etc.

The Random Number Method template, **P-\${(helper.random(5)?string[00000])}**, would produce IDs with a fixed prefix of **P-** followed by a 5-digit random number (including leading zeros), for example **P-00362, P-82394, P-35070**.

### Notes About the Template:

- The template cannot exceed **255** characters, and the resulting Participant ID cannot exceed **30** characters.
- **\${siteId}** and **\$(siteParticipantCount)** are both required but can be in any order.
- Static text can be added to any portion of the template, but cannot include the following characters:
  - Slash (/)
  - Backslash (\)
  - Less Than (<)
  - Greater Than (>)
  - Ampersand (&)
  - Quotation Marks {"
  - Apostrophe (')

**Best Practice:** There is no restriction for going beyond the minimum, but it is best practice to set up the minimum length to match the length of the maximum number of expected Participants.

If the template is invalid for any reason, the system uses a default template of **\${siteOID}** followed by a **dash** and a **six-digit random number**.

## 3.1.5 Accessing the Share Screen

Use the Share screen to add sites to a study and invite users to access it.

### Access the Share Screen

You can open the Share screen from multiple locations in OpenClinica, depending on where you are working.

#### From the My Studies Screen

1. Locate the study card.

2. Click **Share** at the bottom of the study card.
3. Select **Test** or **Production** on the study card to share.



---

### From Study Designer

1. Open the study in Study Designer.
2. In the header bar, Click **Share**.
3. Select **Test** or **Production** to share.

---

### From the Settings Screen

1. Open the study **Settings**.
2. Click **Share**.
3. Select **Test** or **Production** to share.

---

The Share screen opens and displays options for managing site access and user invitations for the selected environment (Test or Production).

## Next Steps

- For details on adding sites to your study, refer to [Adding Sites](#).
- For details on inviting users to your study, refer to [Inviting Users](#).

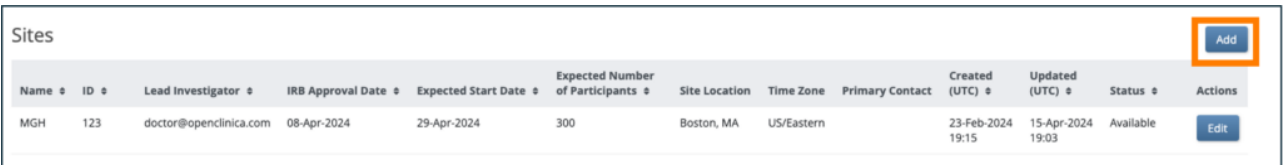
# 3.1.6 Adding Sites

Before inviting users to your study, ensure that at least one site is added. This applies even if your study collects data from only a single site.

## Add a Site

Follow these steps to add a site:

1. On the **Share** screen, scroll down to the Sites section and click **Add**.



Name	ID	Lead Investigator	IRB Approval Date	Expected Start Date	Expected Number of Participants	Site Location	Time Zone	Primary Contact	Created (UTC)	Updated (UTC)	Status	Actions
MGH	123	doctor@openclinica.com	08-Apr-2024	29-Apr-2024	300	Boston, MA	US/Eastern		23-Feb-2024 19:15	15-Apr-2024 19:03	Available	Edit

2. On the **Add Site** screen, begin typing the site name.
  - If the site already exists in another environment, select that site from the list. Fields are prefilled with site information.
  - If you are creating a new site, enter the **Site Name** and enter information in the appropriate fields.
    - **Note:** The **Expected Number of Participants** field is required, but it does not limit the number of participants at the site. Participant limits can only be configured at the study level.
    - For more information on limiting participants in a study, refer to [Create a Study](#).
  - After entering all site details, click **Save**.



## Global Site Fields

Sites are **global**, meaning that if you use a site in *Study A*, you do not need to recreate it for *Study B*. When adding an existing site to a study, the following fields automatically populate:

- Site Name
- Time Zone
- City
- State/Province
- Zip
- Country

□ **Warning:** Only users with the **Admin** or **OpenClinica Team** role can edit global site fields (**Name**, **City**, **State/Province**, **Zip**, **Country**, and **Time Zone**). Other users can view these values but cannot modify them.

## Configure Site-Specific Settings

Once your study is published, you can configure additional site-specific CRF settings on the **Site Details** page within **Study Runner**.

For more details on managing sites, refer to [Managing Sites](#).

### 3.1.7 Inviting Users

Invite new or existing users to access a study and assign appropriate roles and site access.

#### Invite a User to a Study

Before you begin, ensure you can access the Share screen for the study. For instructions, refer to [Using the Share Screen](#).

1. On the Share screen, locate the **People** section.
2. Click **Invite**.
3. Begin typing in the user field and choose one of the following options:
  1. **Invite a new user**
    - a. Select **Invite a new user**.
    - b. On the **Add User** screen, enter values for all required fields.
      - a. For information on "Admin" vs "User" user type, refer to [User Access & Sharing](#).
    - c. Click **Create User**.

□ **Note:** The username you enter cannot be changed after the user is created. Verify the username carefully before submitting.

×

### Add User

Username (note: this cannot be changed after the user is created) \*

First Name \*

Last Name \*

Phone \*

E-mail \*

Organization \*

User Type \*

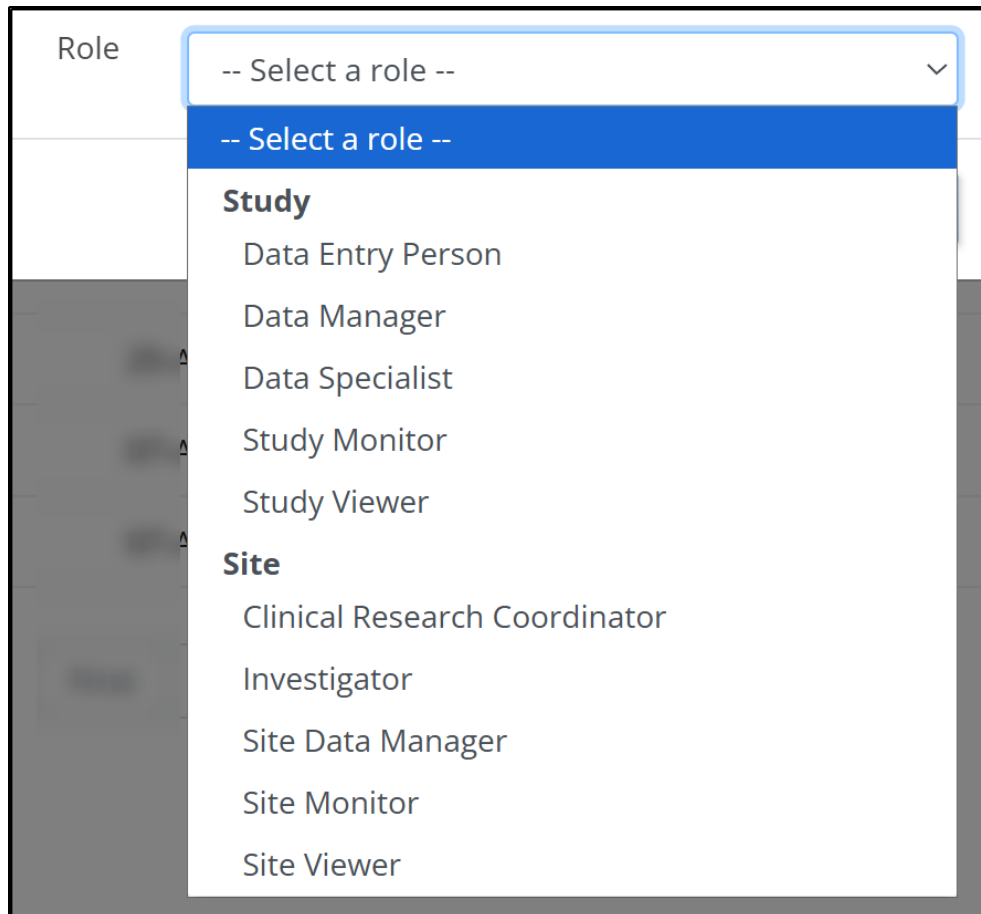
## 2. Add an existing user

- a. Select an existing user from the drop-down list.
- b. The system sends a new email invitation to the selected user.

□ **Note:** Each username and email address in the system must be unique.

4. When prompted, select a role from the list of available roles.

4. For more information about the permissions associated with each user role, refer to [User Access & Sharing](#).



□ **Tip:** To grant access to

multiple sites (for example, for a Monitor responsible for more than one site), click the **Site** field again and select additional sites as needed.

5. Click **Invite**.

An email invitation is sent to the user, and the user appears in the **People** table on the Share screen.

---

## Password Requirements

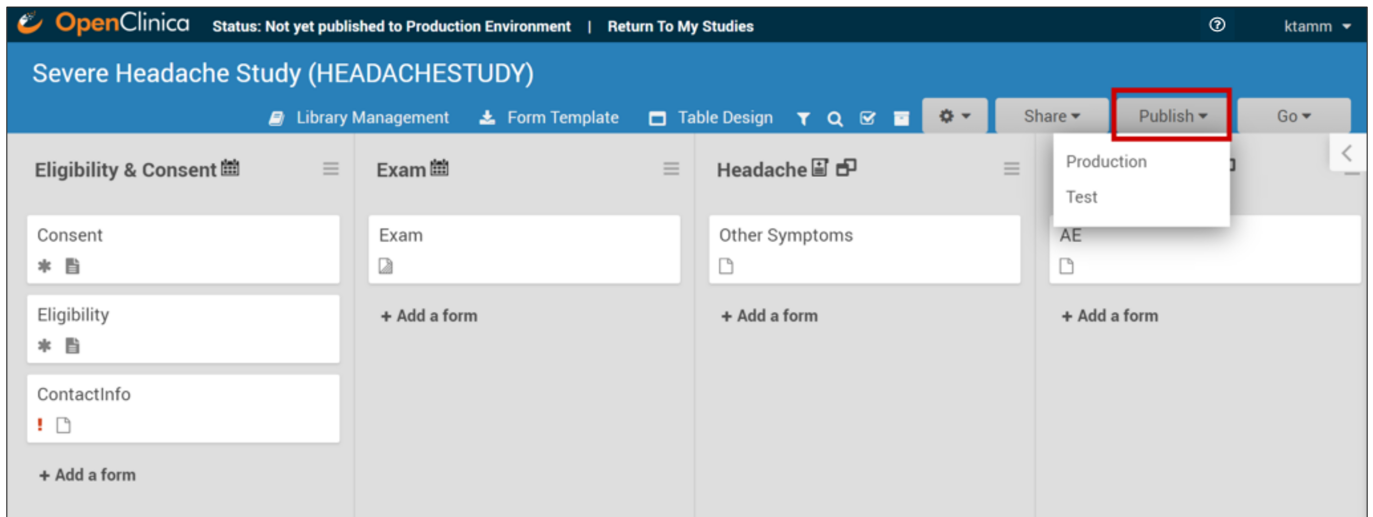
Before a user can access a study, they must create a password that meets the following criteria:

- At least 8 characters in length
- Includes at least one of each of the following:
  - Lowercase letters (**a-z**)
  - Uppercase letters (**A-Z**)
  - Numbers (**0-9**)
  - Special characters (**!@#\$%^&\***)

Once the password is created, the user can sign in and access the study according to the assigned role and site permissions.

## 3.2 Publishing Your Study

When you are ready to see how your study works in Study Runner, you can publish to **Test**. In addition to letting you use Study Runner features, publishing to **Test** generates OIDs that can be used for edit checks (constraints and required values), cross-form logic, skip logic (relevant fields), calculations, and testing API integrations.



**Warning:** Once you publish your study, you can still change the design of your study as needed without having to change Form version information. In other words, you can update your Form definitions without adding new versions of the Forms. The only Form definition properties that cannot be changed after a Form has been published are as follows:

- You cannot change the data type of an item.
- You cannot move an item into or out of a repeating group.
- You cannot change the **bind::oc:itemgroup** value for an item.

If you need to change any of these Form properties, you can remove the original item and replace it with a new item on the Form. You can still add a new Form without any of these restrictions.

## To Publish Your Study

1. In **Study Designer**, click the **Publish** header button.
2. Select **Test** or **Production**.
3. Click **Publish** to confirm that you want to publish your study.

You will now see a link to Test and/or Production under the Go button in the main navigation.

**Tip!** The first time you publish a study, its status is set to Design. This status does not allow users to add participants or enter data. Be sure to go to the **Share** page and change the study status from 'Design' to 'Available' if you are ready for data entry.

It is a best practice to publish to test before production. When you have thoroughly tested your study, you can publish it to **Production**. This should be done only when you feel that you won't need to make any more major changes.

**Warning:** Once you publish a study to **Production**, in addition to the changes above, ANY change to a Form requires you to change the Form version. You cannot:

- Change a Common Event to a Visit Based Event.
- Change a Visit Based Event to a Common Event.
- Change a Repeating Event to a Non-Repeating Event.
- Overwrite a Form version; you must create a new version.

Approved for publication by Paul Bowen. Signed on 2025-02-10 1:28PM

Not valid unless obtained from the OpenClinica document management system on the day of use.

## 3.3 EDC Study Go-Live Checklist

This checklist helps study teams confirm that an OpenClinica study is ready to be published to the Production environment. Reviewing these items before go-live helps reduce risk and supports a smooth transition to active study operations.

□ **Note:** This checklist addresses study configuration within OpenClinica only. You are responsible for completing all internal requirements for approvals, validation, training, and change control in accordance with your organization's SOPs.

---

### Before Publishing to Production

#### Study Overview

Review and confirm the following:

- The study name displayed in OpenClinica is correct and approved for end-user visibility.
- The expected number of participants is configured correctly.
- If applicable, enrollment is configured to stop automatically once the target number of participants is reached.
- Participant ID configuration has been reviewed and approved:
  - System-generated participant IDs, or
  - Manually entered participant IDs, based on study requirements.

#### Study Visits and Events

Review visit and event configuration:

- All required study visits and events have been created.

- Each event has been reviewed to confirm:
  - Repeating versus non-repeating behavior
  - Visit-based versus common event configuration
- Visit schedules and calendaring rules reflect the approved study protocol.
- Notification rules, if used, have been reviewed and tested.
- If advanced scheduling rules were implemented by a solutions consultant:
  - All applicable scenarios have been tested.
  - Test results have been reviewed and approved.

## **Forms and Data Collection**

Review form setup and behavior:

- All study forms are finalized, approved, and available in the appropriate visits.
- Forms appear in the correct order within each visit.
- Any required supporting files (for example, images or CSV files) have been uploaded.
- Form behavior has been reviewed and approved, including:
  - Required field configuration
  - Visibility to site users
  - Participate Properties
  - Source Data Verification (SDV) settings
  - Default form versions
    - **Note:** Additional version management can be performed under Site Settings once published.

- Permission tags have been assigned to forms and user roles(if applicable). Blinding or masking requirements have been reviewed and validated.

## **Roles, Access, and Permissions**

Review user access and permissions:

- All required user roles are configured.
  - Permissions for each role align with study responsibilities.
  - Permission tags, if used, have been validated to ensure appropriate access.
  - Access restrictions for blinded or masked users have been confirmed.
- 

## **After Publishing to Production**

### **Post-Publication Configuration**

After publishing the study to Production and prior to collecting participant data, complete the following steps:

- Configure site-specific settings in Study Runner, as applicable (for example, Consent form versions and Public URL form links).
- Set the study status to **Available**.
- Add all applicable sites to the Production study.
- Invite users to the Production study and assign appropriate roles and site access.

### **Data Review and Monitoring**

Verify that data review and monitoring configurations are correctly implemented:

- The Participant Matrix, Query Matrix, and Common Event tables display the expected information.
- Configured Data Review Tables align with defined study workflows.

- Monitoring and review processes support the study's oversight and compliance requirements.

## **PII / PHI Reminder**

If the study collects Personally Identifiable Information (PII) or Protected Health Information (PHI), verify in the audit log that the data is appropriately masked based on the contact data module and permission tags.

Functional approval by Kate Lambert. Signed on 2025-12-16 5:14PM

Approved for publication by Paul Bowen. Signed on 2025-12-22 5:31PM

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## **3.4 Generating Annotated eCRFs**

This article describes a method for downloading annotated CRFs (aCRFs) which are automatically available for Data Manager roles within Study Runner. Annotated CRFs can be downloaded individually or an Annotated Casebook can be downloaded containing all CRFs for the entire study.

### **Download Individual Annotated CRFs**

1. From the **Tasks** menu in Study Runner, select **CRFs**.

Home Participant Matrix Queries Study Audit Log Tasks ▾

**Submit Data**

- » Participant Matrix
- » Add Participant
- » Queries
- » Schedule Event
- » View Events
- » Import Data
- » Bulk Actions Log

**Monitor and Manage Data**

- » Source Data Verification
- » Study Audit Log
- » Rules
- » View Study
- » Sites
- » CRFs
- » Annotated Casebook
- » Blank Casebook

**Extract Data**

- » View Datasets
- » Jobs
- » Create Dataset
- » Archival Casebooks

**Data Review Tables**

- » View All Tables
- » No Tags Table

2. The *Manage Case Report Forms (CRFs)* page opens. Click the **Download** icon to download an individual Annotated CRF for the form version on that row.

**Manage Case Report Forms (CRFs)**

[Annotated Casebook](#)

Page 1 of 1

CRF Name	Date Updated	Last Updated by	CRF_OID	Version(s)	Date Created	Owner	Status	Download	Actions
Demographics	27-Feb-2023	rbianchi@openclinica.com	F_DEMOGRAPHICS	(original)	21-Feb-2023	rbianchi@openclinica.com	Available		
				1	21-Feb-2023	rbianchi@openclinica.com	Available	N/A	
Vital Signs	27-Feb-2023	rbianchi@openclinica.com	F_VITALSIGNS	(original)	21-Feb-2023	rbianchi@openclinica.com	Available		
				1	21-Feb-2023	rbianchi@openclinica.com	Available	N/A	

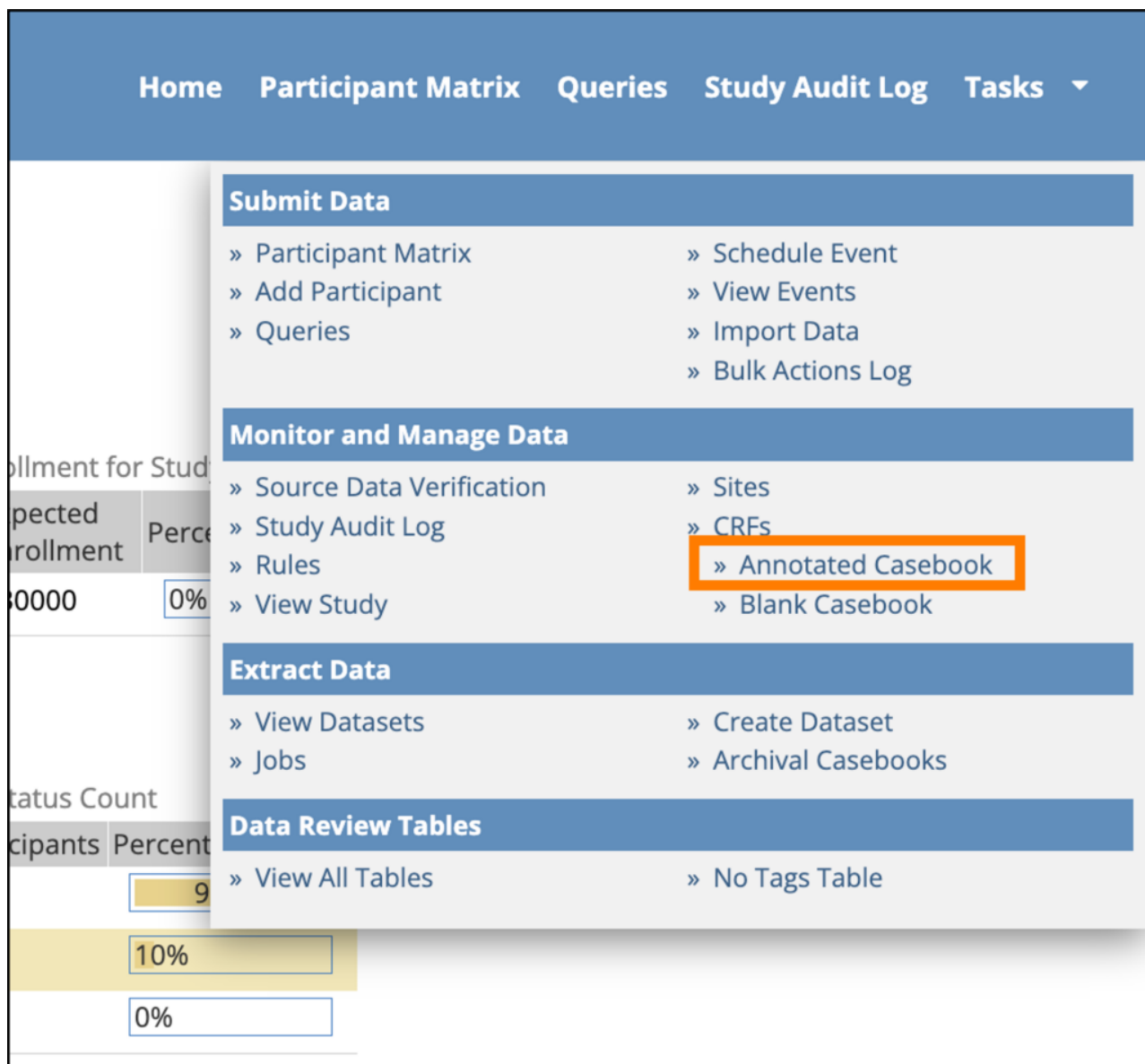
The downloaded PDF document will include a cover page with Study Name, Study OID, Form Name, Form OID, Form Version, and Form Version Initial Publish Date. It also includes the generated date and time in the footer. While there are labels for the Event Name/OID and SDV Configuration for individual CRFs, the values are not displayed because the form could be in more than one event. Download the Annotated Casebook for the study to view these values. From the *Manage Case Report*

Forms (CRFs) page, you can use the **Annotated Casebook** link to get all Annotated CRFs for the study, or follow the steps in the next section.

## Download the Annotated Casebook for the Study

The Annotated Casebook compiles the default versions of active forms in the study, collates them by event, and creates a PDF you can download. Each item includes annotations that describe the form's configuration. This option is only available to Study Data Manager roles and is only available when accessing the study at the Study level (the option is not available when logged in at the Site level).

1. From the **Tasks** menu in Study Runner, select **Annotated Casebook**.



**Note:** The Annotated Casebook page can also be accessed by clicking the **Annotated Casebook** link on the *Manage Case Report Forms (CRFs)* page.

2. Select the *Include archived events and forms* checkbox if you want to include these in the PDF, otherwise only Active forms will be included by default. Click **Get PDF**.

## Annotated Casebook

The Annotated Casebook compiles the default versions of active forms, collates them by event, and creates a PDF you can download. Each item includes annotations that describe the form's configuration.

Include archived events and forms

Get PDF

3. A green message bar will appear letting you know that the PDF is being generated. This may take some time if it is a large study. Click the **Bulk Actions Log** link to navigate to the *Bulk Actions Log* and view the status of the job.

## Annotated Casebook

The Annotated Casebook compiles the default versions of active forms, collates them by event, and creates a PDF you can download. Each item includes annotations that describe the form's configuration.

Include archived events and forms

Get PDF









The PDF is being created. Once it is ready, you can access it from the [Bulk Actions Log](#)

4. Click the **Download** icon to download the Annotated Casebook PDF that was generated.

**Bulk Actions Log**

Bulk actions log displays logfiles that are generated by executing the bulk APIs. [Click here](#) to access API documentation. Reload this page to update job statuses.

Search:

Source	Job Type	Site Name	Job Status	Job Progress	Start Time	Submitted By	End Time	Actions
Kate Test	ARCHIVAL_CASEBOOKS	S_KATETEST(TEST)	COMPLETED	[5]/[5] participants processed	09-Sep-2024 14:52	root	09-Sep-2024 14:53	 
Kate Test	BLANK_CASEBOOK	S_KATETEST(TEST)	COMPLETED		09-Sep-2024 14:52	root	09-Sep-2024 14:52	 
Kate Test	ANNOTATED_CASEBOOK	S_KATETEST(TEST)	COMPLETED		09-Sep-2024 14:52	root	09-Sep-2024 14:52	 
001-001	PARTICIPANT_PDF_CASEBOOK	S_001(TEST)	COMPLETED		09-Sep-2024 14:52	root	09-Sep-2024 14:52	 

Results 1-4 of 4 Show  per page < 1 >

The Annotated Casebook includes the date and time it was generated and the page number on each page. It also includes:

- A cover page with the name of the study, Site Name (if run at the site level), the date and time it was generated, and the page numbers.
- A Table of Contents that includes the name of the study and the study OID, Site Name and Site OID (if run at the site level), a heading for each event and a page number for each CRF below the associated event.

- A title sheet for each aCRF which includes Study Name, Study OID, Site Name and Site OID (if run at the site level), Event Name, Event OID, Form Name, Form OID, Form Version, Form Version Publish Date, and SDV Configuration.
- An annotated CRF for each CRF included in the download.

## Reviewing Annotated CRFs

When reviewing Annotated CRFs, text will appear in different colors to help differentiate the annotations. Each annotation is based off the form definition with similar names. Below is a list of the Annotation Labels, their associated names on the Form Definition, the color and the order which they will appear.

Order in aCRF	Annotation Label	Form Definition Name	Color
1	Label	label	black
2	Name	name	orangered
3	Type	type	black
4	Item Group	bind::oc:itemgroup	blue
5	Show When	relevant	green
6	Required	required	red
7	Required Type	bind::oc:required-type	cornflowerblue
8	Constraint	constraint	magenta
9	Default	default	deepskyblue
10	Calculation	calculation	maroon
11	Trigger	trigger	darkgreen
12	Read-Only	readonly	chocolate
13	Image	image	darkviolet
14	Repeat Count	repeat_count	lime
15	External	bind::oc:external	indigo
16	Choice Filter	choice_filter	dodgerblue
17	Contact Data	instance::oc:contactdata	tomato
18	Video	video	darkviolet
19	Audio	audio	darkviolet
20	Identifier	instance::oc:identifier	tomato
21	Constraint Type	bind::oc:constraint-type	darkolivegreen
22	[Custom Annotation]	bind::oc:oc_annotation_[Custom Annotation]	black

### Notes:

- *Items with relevant logic will have a Show When annotation, but will always be displayed within the annotated form.*
- *Select\_one or select\_multiple item using choice filters will have a Choice Filter annotation, but will display all possible Choice values.*
- *Custom annotations are designed by the study designer in the Form Definition. To learn more about how to define custom annotations, see [Using the Form Template](#).*
- *All items with type "calculate" will appear at the end of the annotated form.*

The Annotated values occasionally need to have some symbols changed from their value on the Form Definition to their value on the Annotated CRF for technical compatibility. Below is a list of the original values from the Form Definition to the replacement value that will appear on the Annotated

CRF along with each Annotated Label which may have that symbol change.

Original Symbol	Annotation Replacement Symbol	Annotation Label
{	[	Default, Calculation, Label, Required, Constraint, Trigger, Item Group, Choice Name, Choice Label, Show When, Choice Filter, Custom Annotation
}	]	Default, Calculation, Label, Required, Constraint, Trigger, Item Group, Choice Name, Choice Label, Show When, Choice Filter, Custom Annotation
>	gt	Default, Calculation, Required, Constraint, Trigger, Item Group, Show When, Choice Filter, Custom Annotation
<	lt	Default, Calculation, Required, Constraint, Trigger, Item Group, Show When, Choice Filter, Custom Annotation
-	\_	Choice Filter, Video, Audio, Custom Annotation
*	\*	Custom Annotation

**Note:** Any label formatting done in the form definition will carry over to the annotated CRF. For example, if the label includes *\*label\** then the label will be **bolded**.

## Languages

Annotated CRFs and Casebooks can be displayed in different languages (only for studies configured to support this). When a form has multiple languages configured, the annotated CRF or Casebook will display in the same language that would appear for the user when opening a form to edit on screen. This only applies to the user-defined labels and hints defined for the form. System-generated annotation labels are always in English as described above. **Note:** *OpenClinica does not yet have every language configured and tested. New languages are added to the system by request. If your preferred language is not currently set up in OpenClinica, please reach out to our Support Team to discuss getting it added.*

Approved for publication by Kate Lambert. Signed on 2026-02-18 9:54AM

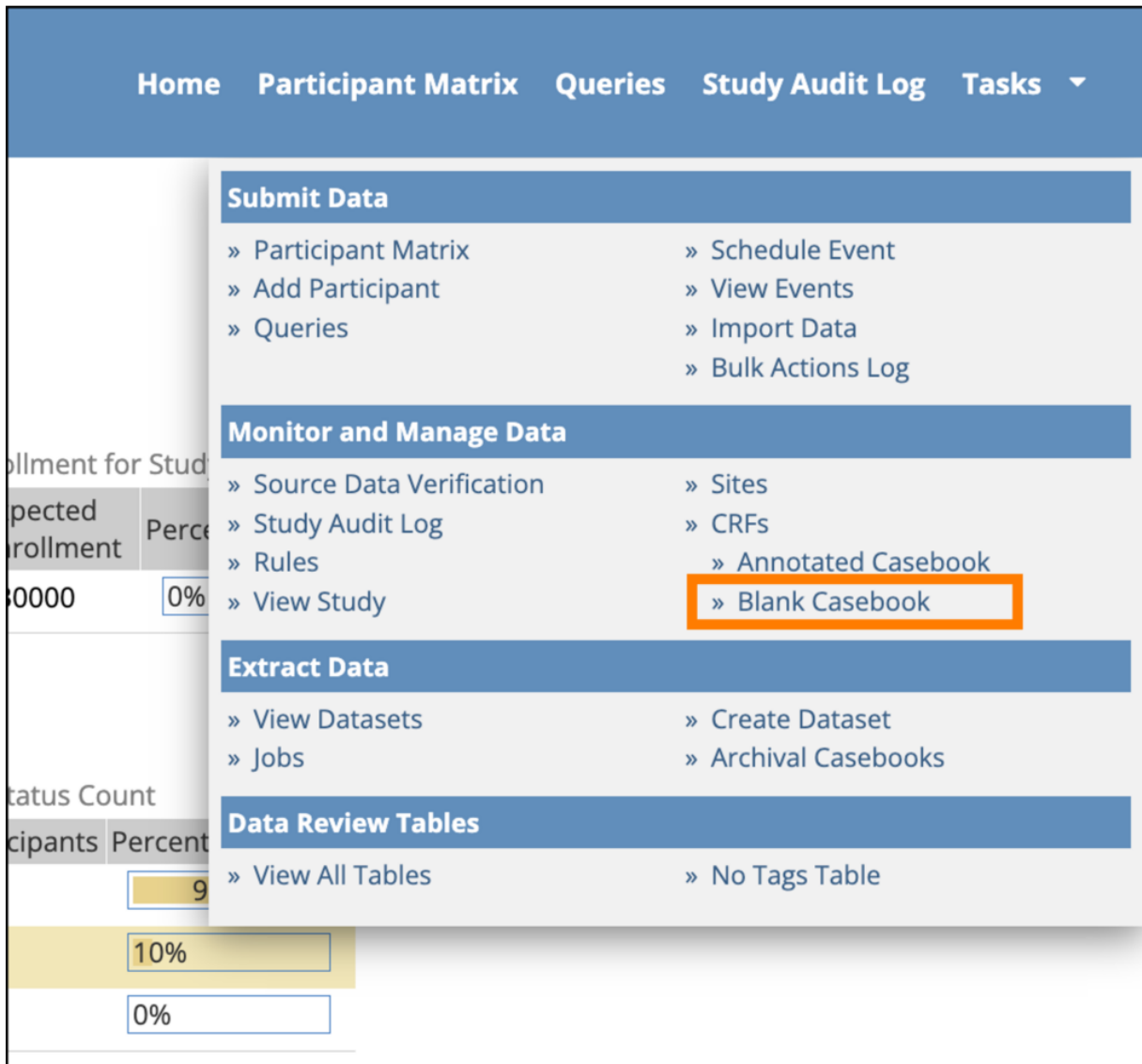
Not valid unless obtained from the OpenClinica document management system on the day of use.

## 3.5 Generating Blank CRFs

This article describes a method for downloading blank CRFs which are automatically available for Data Manager, Viewer, Monitor, CRC, Principal Investigator, Data Entry Person, and Data Specialist roles within Study Runner.

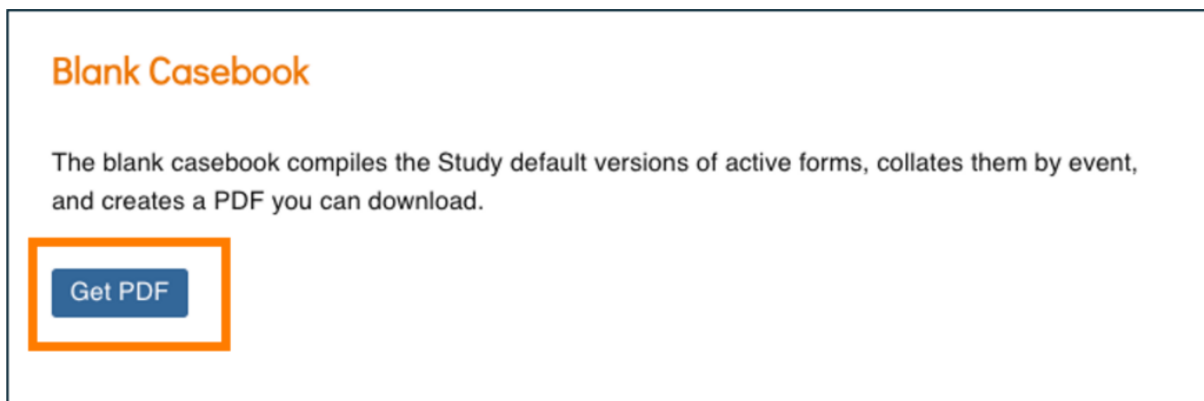
### Download Blank CRFs

1. From the **Tasks** menu in Study Runner, select **Blank Casebook**.



**Note:** The specific user type dictates where in the Tasks menu the Blank CRF option will appear. Data Manager, Viewer, and Monitor users will see the option under "Monitor and Manage Data" and CRC, Principal Investigator, Data Entry Person, and Data Specialist users will see the option under "Submit Data".

2. The Blank Casebook page opens. Click the **Get PDF** button to download the Blank Casebook.



3. A green message bar will appear letting you know that the PDF is being generated. This may take some time if it is a large study. Click the **Bulk Actions Log** link to navigate to the *Bulk Actions Log* and view the status of the job. Refresh the page if the job has not yet completed.

## Blank Casebook

The blank casebook compiles the Study default versions of active forms, collates them by event, and creates a PDF you can download.









Get PDF

The PDF is being created. Once it is ready, you can access it from the [Bulk Actions Log](#).

4. Click the **Download** icon to download the Blank Casebook PDF that was generated.

**Bulk Actions Log**

Bulk actions log displays logfiles that are generated by executing the bulk APIs. [Click here](#) to access API documentation. Reload this page to update job statuses. Search:

Source	Job Type	Site Name	Job Status	Job Progress	Start Time	Submitted By	End Time	Actions
Kate Test	ARCHIVAL_CASEBOOKS	S_KATETEST(TEST)	COMPLETED	[5]/[5] participants processed	09-Sep-2024 14:52	root	09-Sep-2024 14:53	 
Kate Test	BLANK_CASEBOOK	S_KATETEST(TEST)	COMPLETED		09-Sep-2024 14:52	root	09-Sep-2024 14:52	 
Kate Test	ANNOTATED_CASEBOOK	S_KATETEST(TEST)	COMPLETED		09-Sep-2024 14:52	root	09-Sep-2024 14:52	 
001-001	PARTICIPANT_PDF_CASEBOOK	S_001(TEST)	COMPLETED		09-Sep-2024 14:52	root	09-Sep-2024 14:52	 

Results 1-4 of 4 Show  per page < 1 >

The Blank Casebook includes the date and time it was generated and the page number on each page. It also includes:

- A cover page with the Study Name and Site Name if run at the site level.
- A Table of Contents that includes the name of the Study Name and the study OID, Site Name and Site OID (if run at the site level), a heading for each event and a page number for each CRF below the associated event.
- A title sheet for each CRF which includes Study Name, Study OID, Site Name and Site OID (if run at the site level), Event Name, Event OID, Form Name, Form OID, Form Version, and Form Version Publish Date.
- A blank CRF for each CRF included in the download.

## Languages

Blank Casebooks can be displayed in different languages (only for studies configured to support this). When a form has multiple languages configured, the Blank Casebook will display in the same language that would appear for the user when opening a form to edit on screen.

**Note:** *OpenClinica does not yet have every language configured and tested. New languages are added to the system by request. If your preferred language is not currently set up in OpenClinica, please reach out to our Support Team to discuss getting it added.*

Functional approval by Kate Lambert. Signed on 2024-09-09 4:23PM

Approved for publication by Paul Bowen. Signed on 2025-02-10 1:18PM

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