4.1 Data Review Tables

> **Definition:**
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> **Data Review Tables:** Custom tables of form data used to review data and perform bulk actions in Study Runner.
> **Potential Uses:**
> • **Remove erroneous form data after an import:** Quickly review form data in bulk after importing data (such as data from devices). If issues are noticed, the form data can be removed without having to go into each form individually. The issue can then be addressed, and the data can be imported correctly.
> • **Bulk-close automatic queries:** If automatic queries are set to appear incorrectly and the issue has been resolved, these automatic queries can be resolved in bulk.
> • **Review information to catch potential errors:** Create a data review table to track a participant's weight from visit to visit and check for any potential errors. If an error is suspected, a query can be added or the value can be updated.
> **Users:**
> • Investigators, Clinical Research Coordinators, Data Managers, Data Entry Persons, and Data Specialists.
> • Monitors can access Data Review Tables where they can view and close queries, but they cannot remove or restore forms.
> • Site/Study Viewer users are not currently able to access Data Review Tables.

Data Review Tables are first created and configured within Study Designer by a Data Manager. After the table is configured and the study is published, the table can be accessed from the **Tasks** menu in Study Runner.

Table Features:

- Filter and sort data by any column
- Bulk-close open Queries on any items in the table
- Bulk remove/restore primary forms
- Drill into each data point in the source form
- Download the entire report to review or print

Each custom table includes items from a primary form. The primary form can either be in exactly one repeating event or in one or more non-repeating events. The table can include items from one or more additional forms in non-repeating events. If any forms within the table have permission tags, the entire table will only be available to users with those permission tags.

Accessing Data Review Tables:

1. From the **Tasks** menu in Study Runner, select the table name in the **Data Review Tables** section.
   a. The **Data Review Tables** section will only appear if a table has been created for the study and the user has access to the Data Review Table.

Sort, Filter, and Review Tables:

1. Click **Active Records** to display the dropdown menu and select **Removed Records** to display

Removed and *Archived* primary forms.

   a. To toggle back to the *Active Records* view, click **Removed Records** and select **Active Records** from the dropdown menu.

2. Click the **arrows** or the heading name for any column to sort the column ascending or descending. Click the red **X** to clear the filter.

3. Click the **Filter** icon to filter the table to include only records with specific values. After selecting the filter criteria, click **Apply** to activate the filter.

   a. Click the **Filter** icon again to update the filter, or click **Clear** to remove it.

4. The column headings will display a label for the required information columns or will display the item name.

5. Hover over the column heading to see which form the information is coming from. The hover text will display "primary form" after the form name if it is the primary form of the Data Review Table.

6. Click the **value** in a cell to open the form in *Edit* mode for the item that was clicked. Columns with a *Select One* item type will display the label and then have the coded value in parentheses.

7. Click the **Participant ID** to open the Participant Record on the Participant Details Page.

8. Click the **Download** icon to download a copy of the Data Review Table to review outside of OpenClinica and/or print a hard copy.

Note: *Forms with a status of "Not Started" will not appear anywhere on the Data Review Table.*

Select Form Rows vs. Queries:

1. Select the checkbox in the checkbox column header to select all form rows and queries in the table.

2. Select an individual form row by clicking the checkbox in the first column of the table. This will also select the checkbox for any queries on the form row.

3. Select the checkbox next to any query to individually select one or more queries.

		Participant ID	Event Start Date	Form Status	Event Name	Event Status	Form Last ModifiedBy	Form Last Modified Date	Age	Sex	Vital Signs Performed ; [VSTEST] Perform
	☐	↑≣ ✕ ▽	↑↓ ▽	↑↓ ▽	↑↓ ▽	↑↓ ▽	↑↓ ▽	↑↓ ▽	↑↓ ▽	↑↓ ▽	↑↓ ▽
	☐	001	01-Feb-2023	data entry complete ↺	Screening Visit	completed 🖋	rbianchi@openclinica.com	27-Feb-2023	23	Female (F)	No (N)
	☐	002	01-Feb-2023	data entry complete	Screening Visit	data entry started	rbianchi@openclinica.com	27-Feb-2023	23	Male (M)	Yes (Y)
		003	01-Mar-2023	data entry complete	Screening Visit	completed 🖋🔒	rbianchi@openclinica.com	04-Apr-2023	18	Unknown (U)	Yes (Y)
	☐	004	01-Mar-2023	data entry complete	Screening Visit	completed	rbianchi@openclinica.com	04-Apr-2023	27	Female (F)	No (N)

Note: *Locked primary forms will not have checkboxes available because the form cannot be removed/restored when it is locked. Similarly, there will not be a checkbox for the queries which have a locked primary form because these queries cannot be closed in bulk.*

Bulk Remove and Restore Primary Forms:

1. From the **Active Records** view, select the checkbox next to each form row you would like to remove.
2. Click **Remove Forms** to remove the primary form for the rows selected.
3. Add a reason for removal and click **Yes** to confirm.

1. From the **Removed Records** view, select the checkbox for each form you would like to restore.
2. Click **Restore Forms** to restore the primary form back to an active record.
3. Add a reason for restoration and click **Yes** to confirm.

Note: *When removing forms, you will remove the entire primary form even if all items are not shown on the custom table. Any other data from non-repeating events included beyond the primary form will not be removed.*

View Queries:

1. Click the **Queries** bubble to individually view and respond to a query within the record.
   a. Queries within Locked forms will open in read-only mode and cannot be responded to.
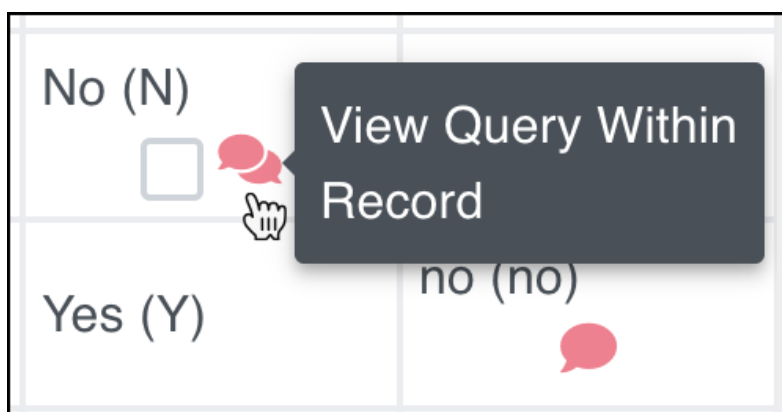
Bulk Close Queries:

1. Select the checkbox for each query you want to close.
   a. Alternatively, select the checkbox for the form row to select all queries in the row.
2. Click **Close Queries**
3. Add a comment and click **Yes** to confirm.

	Participant ID	Event Start Date	Form Status	Event Name	Event Status	Form Last ModifiedBy	Form Last Modified Date	Age	Sex	Vital Signs Performed ; [VSTEST] Perform
☑	006	27-Mar-2023	data entry complete	Screening Visit	stopped	rbianchi@openclinica.com	11-Apr-2023	17 ☑💬	Male (M)	No (N)
☐	005	30-Mar-2023	data entry complete	Screening Visit	data entry started	rbianchi@openclinica.com	04-Apr-2023	20	Male (M)	
☑	004	01-Mar-2023	data entry complete	Screening Visit	completed	rbianchi@openclinica.com	04-Apr-2023	27	Female (F)	No (N) ☑💬

Note: *Monitors will not have the* **Remove Forms** *or* **Restore Forms** *buttons.*

Use the **Create and Configure Data Review Tables** page for information on creating Data Review Tables as a Data Manager.

Functional approval by Riley Bianchi. Signed on 2023-04-11 4:02PM

Approved for publication by Paul Bowen. Signed on 2023-04-28 12:29AM

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