

4.1 Data Review Tables

Definition:

•

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.

The screenshot shows the 'Medical History' table in the OpenClinica interface. The table has columns for Participant ID, Site, Event Start Date, Form Status, Event Name, Event Status, Form Last Modified By, Form Last Modified Date, Were any medical conditions or events re..., What was the medical or condition, and What is the Medical History - primary form. The table contains 13 rows of data. Red callouts 1-8 point to specific UI elements: 1. Active Records button; 2. Sort arrow; 3. Filter icon; 4. Form Last Modified Date cell; 5. What was the medical or condition cell; 6. Were any medical conditions or events re... cell; 7. Participant ID cell; 8. Download icon.

<input type="checkbox"/>	Participant ID	Site	Event Start Date	Form Status	Event Name	Event Status	Form Last Modified By	Form Last Modified Date	Were any medical conditions or events re...	What was the medical or condition	What is the Medical History - primary form
<input type="checkbox"/>	123	San Francisco	01-Mar-2024	data entry complete	Baseline Visit	data entry started	klambert@openclinica.com	08-May-2024	yes (1)	06-May-2024	headache
<input type="checkbox"/>	101	San Francisco	19-Apr-2024	data entry complete	Baseline Visit	data entry started	klambert@openclinica.com	08-May-2024	no (2)		
<input type="checkbox"/>	500	San Francisco	07-May-2024	data entry complete	Baseline Visit	data entry started	klambert+crc	08-May-2024	yes (1)	22-Apr-2024	heart attack
<input type="checkbox"/>	159	San Francisco	15-Mar-2024	initial data entry	Baseline Visit	data entry started	klambert+crc	07-May-2024	yes (1)		
<input type="checkbox"/>	006	The Best Hospital	30-Apr-2024	initial data entry	Baseline Visit	data entry started	klambert+crc	30-Apr-2024	no (2)		

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.
4. Select all open queries for a particular item by clicking the checkbox in the item column header.

<input type="checkbox"/>	Participant ID	Site	Event Start Date	Form Status	Event Name	Event Status	Form Last ModifiedBy	Form Last Modified Date	Were any medical conditions or events re...	What was the medical event or condition ...	What is the medical condition or event t...
<input type="checkbox"/>	500	San Francisco	07-May-2024	data entry complete	Baseline Visit	data entry started	klambert@ope nclinica.com	08-May-2024	yes (1)	22-Apr-2024	heart attack
<input type="checkbox"/>	123	San Francisco	01-Mar-2024	data entry complete	Baseline Visit	data entry started	klambert@ope nclinica.com	08-May-2024	yes (1)	06-May-2024	headache
<input type="checkbox"/>	101	San Francisco	19-Apr-2024	data entry complete	Baseline Visit	data entry started	klambert@ope nclinica.com	08-May-2024	no (2)		
<input type="checkbox"/>	159	San Francisco	15-Mar-2024	initial data entry	Baseline Visit	data entry started	klambert+crc	07-May-2024	yes (1)		

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.

<input type="checkbox"/>	Participant ID	Site	Event Start Date	Form Status	Event Name	Event Status
<input checked="" type="checkbox"/>	500	San Francisco	07-May-2024	data entry complete	Baseline Visit	data entry started
<input checked="" type="checkbox"/>	123	San Francisco	01-Mar-2024	data entry complete	Baseline Visit	data entry started
<input type="checkbox"/>	101	San Francisco	19-Apr-2024	data entry complete	Baseline Visit	data entry started

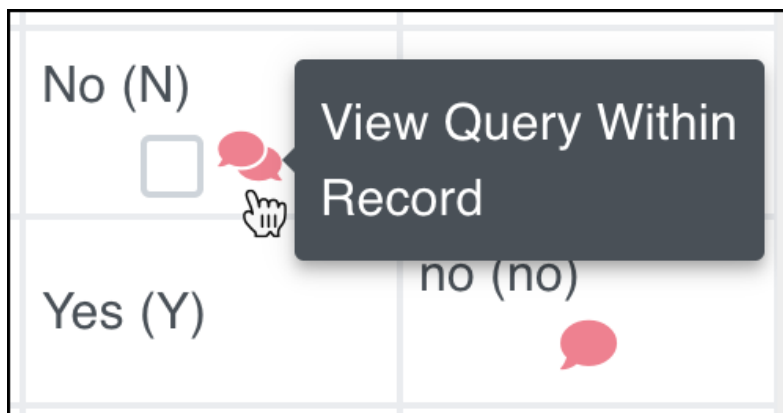
1. From the **Removed Records** view, select the checkbox for each form you would like to restore.
2. Click **Restore Forms** to restore the primary form back to an active record.
3. Add a reason for restoration and click **Yes** to confirm.

<input type="checkbox"/> Removed Records <input type="button" value="Restore Forms"/>								
<h3>Medical History</h3> <p>Medical History</p>								
<input type="checkbox"/>	Participant ID	Site	Event Start Date	Form Status	Event Name	Event Status	Form Last ModifiedBy	Form Last Modified Date
	↑↓ ▾	↑↓ ▾	↑↓ ▾	↑↓ ▾	↑↓ ▾	↑↓ ▾	↑↓ ▾	↑↓ ▾
<input checked="" type="checkbox"/>	006	The Best Hospital	30-Apr-2024	initial data entry 	Baseline Visit	data entry started	klambert@openclinica.com	08-May-2024
<input checked="" type="checkbox"/>	159	San Francisco	15-Mar-2024	initial data entry 	Baseline Visit	data entry started	klambert@openclinica.com	08-May-2024

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. Alternately,
 - a. Select the checkbox for the form row to select all queries in the row; or
 - b. Select the checkbox for the item column to select all queries for the item.
2. Click **Close Queries**
3. Add a comment and click **Yes** to confirm.

☰ Active Records Remove Forms Close Queries											
Medical History											
<input type="checkbox"/>	Participant ID	Site	Event Start Date	Form Status	Event Name	Event Status	Form Last ModifiedBy	Form Last Modified Date	Were any medical conditions or events re...	What was the medical event or condition ...	What is the medical condition or
	↑↓ ▾	↑↓ ▾	↑↓ ▾	↑↓ ▾	↑↓ ▾	↑↓ ▾	↑↓ ▾	↑↓ ▾	↑↓ ▾ 🔍	↑↓ ▾ 🔍	↑↓ ▾ 🔍
<input type="checkbox"/>	005	The Best Hospital	30-Apr-2024	data entry complete	Baseline Visit	data entry started	klambert@openclinica.com	09-May-2024	no (2)		
<input type="checkbox"/>	123	San Francisco	01-Mar-2024	data entry complete	Baseline Visit	data entry started	klambert@openclinica.com	08-May-2024	yes (1)	06-May-2024	headache
<input checked="" type="checkbox"/>	101	San Francisco	19-Apr-2024	data entry complete	Baseline Visit	data entry started	klambert@openclinica.com	08-May-2024	no (2)		
<input type="checkbox"/>	004	The Best Hospital	30-Apr-2024	initial data entry	Baseline Visit	data entry started	klambert+crc	30-Apr-2024	yes (1)		
<input type="checkbox"/>	003	The Best Hospital	30-Apr-2024	data entry complete	Baseline Visit	data entry started	klambert+crc	30-Apr-2024	yes (1)	15-Jun-2022	headache
<input type="checkbox"/>	002	The Best Hospital	30-Apr-2024	data entry complete	Baseline Visit	data entry started	klambert+crc	30-Apr-2024	yes (1)		

Showing 1 to 10 of 10 entries << < 1 > >> 20 ▾

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 Kate Lambert. Signed on 2024-05-10 3:31PM

Approved for publication by Paul Bowen. Signed on 2024-07-01 11:52PM

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