18.1 Data Review Tables

Data Review Tables allow you to review, filter, and take bulk actions on form data within **Study Runner**. They help streamline data cleaning and query management tasks. **User Roles:**
Data Managers, Clinical Research Coordinators (CRCs), Investigators, Data Entry Persons, and Data Specialists.
Monitors can view and close queries based on their study role, but do not have permission to remove or restore forms.
Site/Study Viewers do not have access to Data Review Tables.

Potential Uses

You can use **Data Review Tables** to efficiently manage and validate large volumes of study data. Common use cases include:

- **Remove erroneous form data after an import**
  Quickly review imported data in bulk (for example, data from connected devices). If you identify issues, you can remove incorrect form data without opening each form individually. After correcting the issues in the source file, re-import the data accurately.
- **Bulk-close automatic queries**
  When automatic queries appear incorrectly and the underlying issue has been resolved, you can close these queries in bulk to keep your data clean and up to date.
- **Review information to catch potential errors**
  Create a Data Review Table to track a participant's weight from visit to visit and check for potential errors. If an error is suspected, you can add a query or update the value as needed.

 Tip: Use Data Review Tables to efficiently validate large datasets and resolve multiple records at once.

Data Review Tables are **created and configured** by a **Data Manager** in **Study Designer**. Once the study is published, authorized users can access the table from the **Tasks** menu in **Study Runner**.

Table Features

- **Filter and sort** data by any column
- **Bulk-close** open queries
- **Remove or restore** primary forms in bulk
- **Drill into** data points within source forms
- **Download** the full table for offline review or printing

Each custom table includes items from one **primary form**, which can exist in:

- Exactly one **repeating event**, or
- One or more **non-repeating events**

Tables may also include items from additional forms in non-repeating events.

 Warning: If any forms in a table have **permission tags**, the entire table is accessible **only** to users with those tags.

Accessing Data Review Tables

1. In **Study Runner**, open the **Tasks** menu.
2. Under **Data Review Tables**, select the desired table name.
    - The **Data Review Tables** section appears only if a table has been created and you have access to it.

 Note: A user's ability to edit, review, or view forms accessed through a Data Review Table depends on their *form access level* (Edit, Review, Read-only) assigned in User Roles.

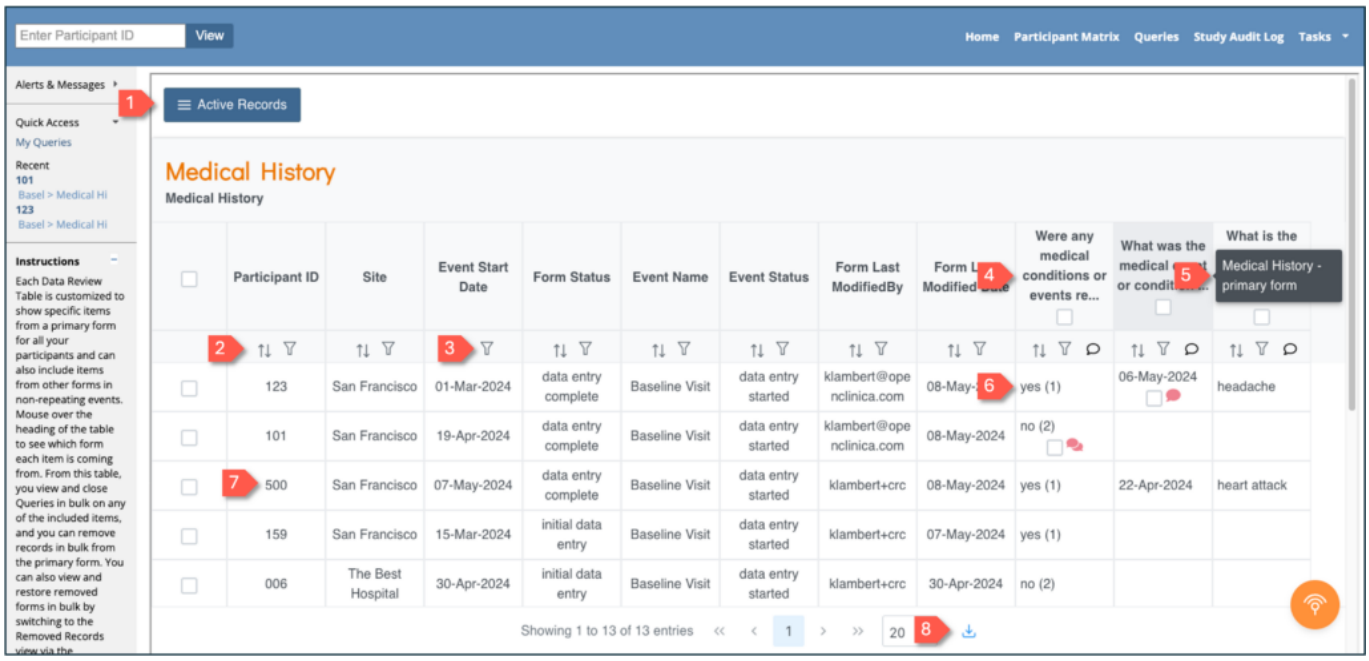
Sorting, Filtering, and Reviewing Tables

1. Click **Active Records** and select **Removed Records** to view removed or archived forms.
    - To return to the active view, click **Removed Records** again and choose **Active Records**.
2. Click the **column header** or **arrows** to sort data ascending or descending.
    - Click the red **X** to clear a filter.
3. Click the **Filter icon** to filter records by specific values.
    - Choose your filter criteria and click **Apply**.
    - Click the icon again to update the filter or select **Clear** to remove it.
        - **Filtering by Empty or Non-Empty Values:** For free-text items, the filter menu includes **Is Empty** and **Not Empty** to help identify records based on whether a value has been entered. **Note:** Some filter logic is restricted based on compatibility with additional rules.

Filter Condition	Availability	Effect	Additional Rules
Is Empty	Only when no filter rule is configured	Shows rows with no value	Cannot be combined; "Add Rule" hidden
Not Empty	Always available	Shows rows where a value is present	Can be combined with other rules

4. Column headers display either the required data label or the item name.
5. Hover over a column heading to see which form the information originates from.
    - The hover text shows "primary form" when it references the table's primary form.
6. Click a cell value to open the form. Your ability to edit, review, or view the form depends on your assigned form access level (Edit, Review, or Read-only).
    - For *Select One* item types, the label and coded value appear together.
7. Click a **Participant ID** to open the participant's record on the **Participant Details** page.
8. Click the **Download icon** to export the table for offline review or printing. When a Data Review Table is downloaded, the export includes all status indicators shown in the on-screen table. If a form or event is locked, signed, removed, or archived, these indicators are added to the base status in the same cell of the exported file. Each indicator appears in parentheses following the status. **Examples:**
    - **initial data entry (removed)**
    - **completed (locked) (signed)**
    - **data entry started (archived)** If more than one indicator applies, they are listed in

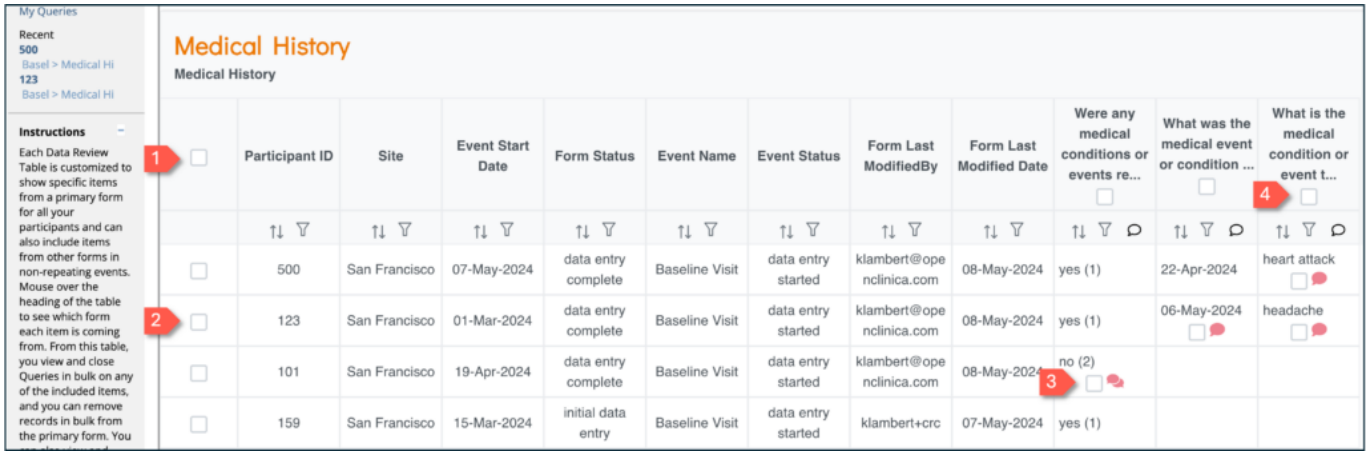
alphabetical order.



 Note: Forms with a status of **Not Started** do not appear in the Data Review Table.

Selecting Form Rows and Queries

1. Select the **checkbox** in the header to select all form rows and queries.
2. Select an individual form row to include its associated queries.
3. Select checkboxes beside individual queries to act on them.
4. Click the **item column header checkbox** to select all open queries for that item.



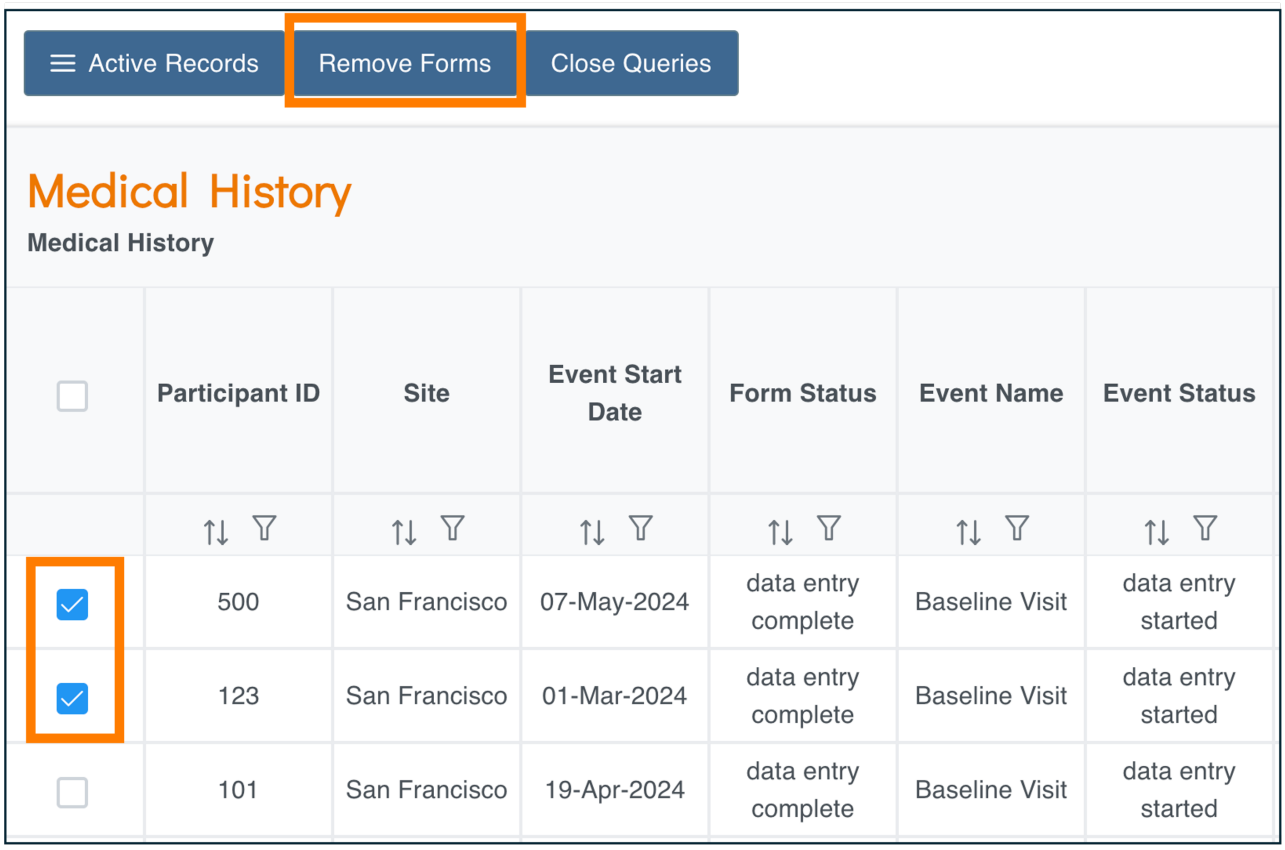
 Warning:

- Locked primary forms cannot be removed or restored, so their checkboxes are disabled.
- Queries within locked forms cannot be closed in bulk.

Bulk Remove and Restore Primary Forms

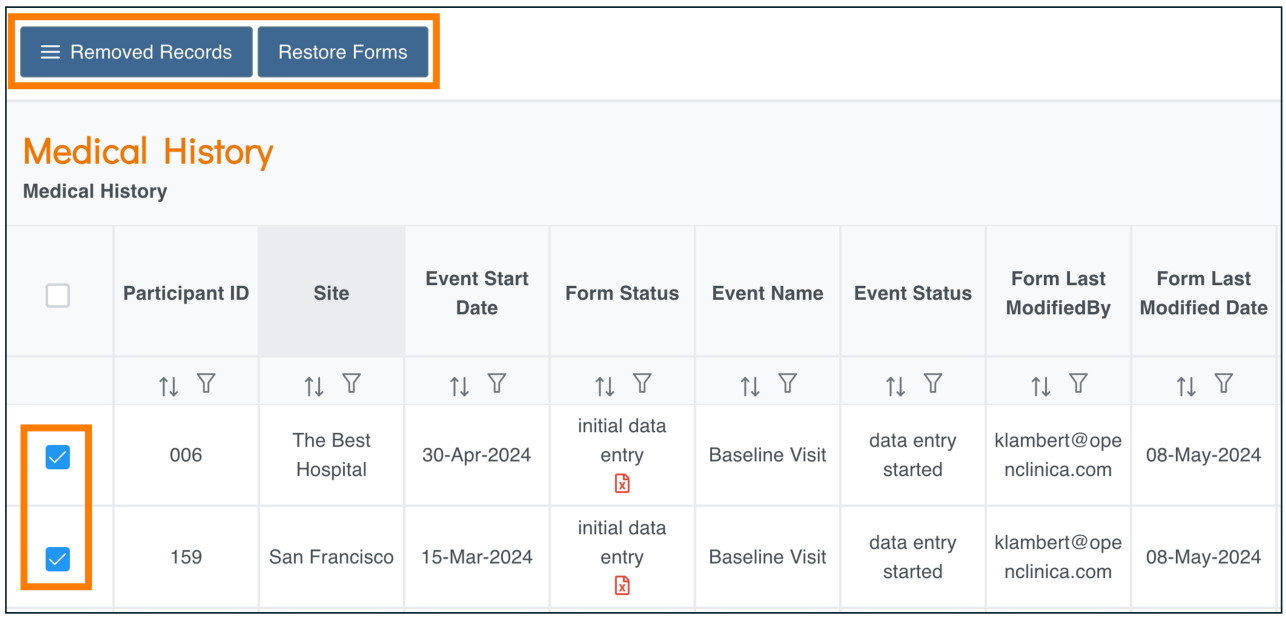
To remove forms:

1. From **Active Records**, select the checkboxes for the rows to remove.
2. Click **Remove Forms**.
3. Enter a reason for removal and click **Yes** to confirm.



To restore forms:

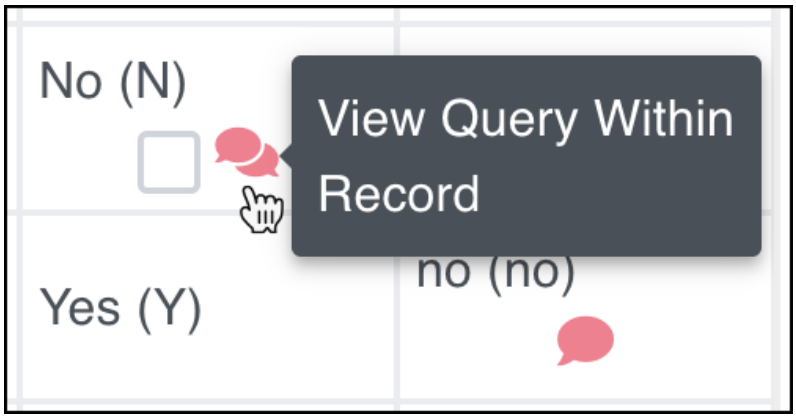
1. From **Removed Records**, select the checkboxes for the forms to restore.
2. Click **Restore Forms**.
3. Enter a reason for restoration and click **Yes** to confirm.



Warning: Removing a primary form deletes the entire form, even if not all items are displayed in the table.
Associated non-repeating event data from other forms will **not** be removed.

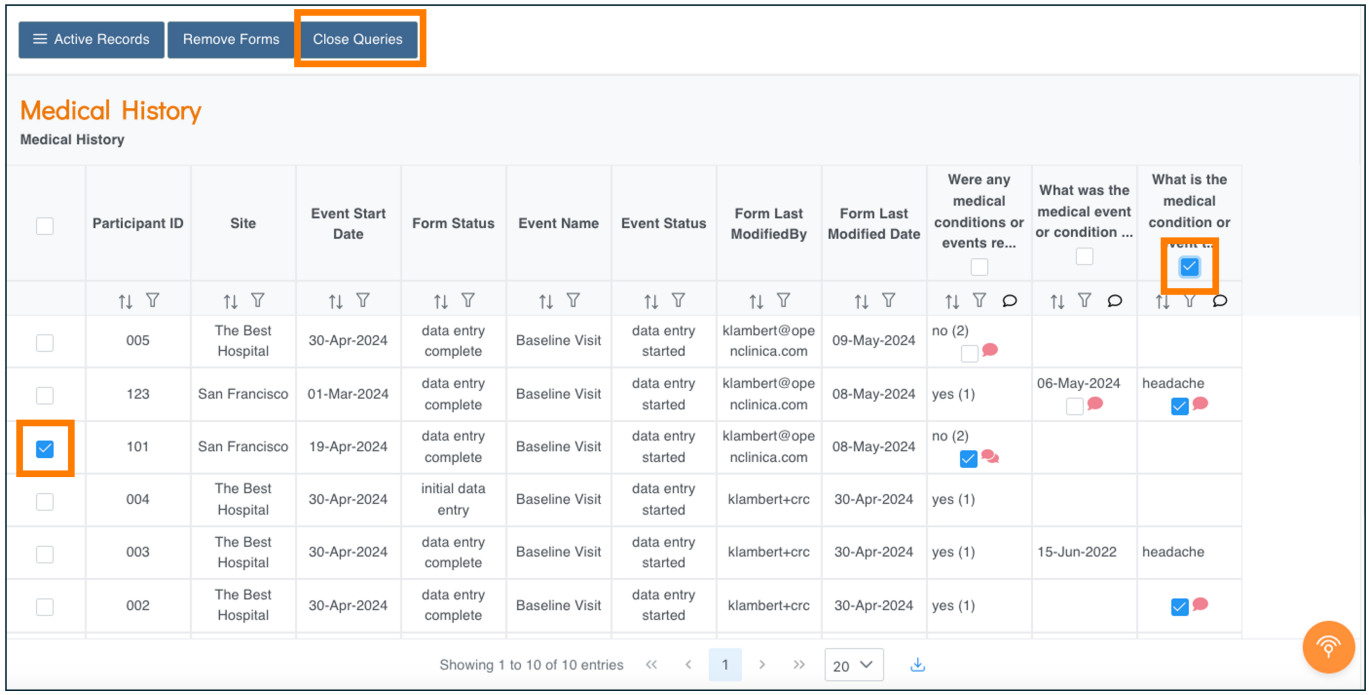
Viewing Queries

1. Click the **Queries bubble** to open and respond to individual queries.
    - Queries in locked forms open in **read-only** mode and cannot be responded to.



Bulk Close Queries

1. Select checkboxes for the queries to close.
    - To select all queries for a form row, check the **form row** box.
    - To select all queries for an item, check the **item column** box.
2. Click **Close Queries**.
3. Enter a comment and click **Yes** to confirm.



 Note: Monitors can view and close queries based on their role permissions, but they do not have permission to remove or restore forms. Editing or reviewing forms opened from a Data Review Table is governed by the user's form access level assigned in User Roles. For more information, refer to **Managing Form Access and Permissions**. For more information on creating Data Review Tables as a Data Manager, refer to **Create and Configure Data Review Tables**.

Approved for publication by Kate Lambert. Signed on 2025-12-12 12:17PM

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