

Jessica Brink - Quick Reference Guide Work Sample
 A quick reference guide a proprietary web application. The quick reference guide was developed in Microsoft Word and was provided to users upon gaining access to the application.

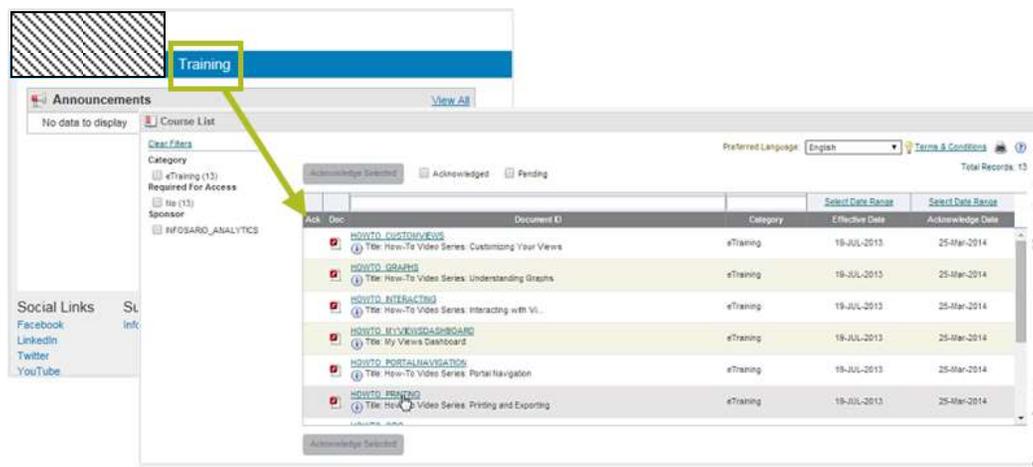
Guide to Getting Started

- Login 2
- Collection Essentials..... 2
- Create a New Collection 2
- Add a Protocol or Site – Using Add Function 2
- Add a Protocol or Site – Using Advanced Search 3
- Apply a Collection 3
- Edit a Collection 4
- Temporarily Remove Protocols/Sites 4
- Copy a Collection..... 4
- Delete a Collection..... 4
- XXX Home Page..... 5
- Visualization Overview..... 7



Want to learn more?

Check out the Training link on the Portal home page.



Our innovative technology, combines our 30 years of expertise and proven processes with data in a suite of systems which enable evidence-based decisions to be made throughout the clinical development process. This is The Data Driven Difference, powered by XXX®.

XXX delivers a new level of **trial management** and **process transparency** with **on-demand access** to **up-to-date data** (updated within the last 24 hours), increasing transparency and oversight of your trials at all levels, while optimizing execution and efficiencies.

* Please note that the various service components of XXX, including XXX, are still under development through their agile development process. Features and functionality may change over time as this development continues.

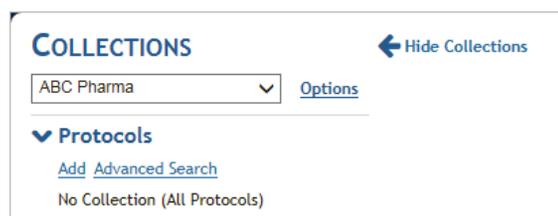
Login

<https://XXX.com>

1. Click **Log In**.
2. Enter your **User Name** and **Password**.
If you need assistance, use the Forgot My Password and Unlock My Account links.
3. Click **Sign in**.
4. Click **Analytics** on the Site Gateway home page.

Collection Essentials

A collection is a group of protocols and/or sites that you analyze in XXX. You may save the collection for easy application to tiles and visualizations.



- The first time you use XXX, All My Data is the only collection available. The All My Data collection includes all protocols and sites in which you have access.
- You may create as many collections as needed.
- You may add up to 200 protocols and 500 sites to each collection.
- XXX defaults to the last collection you applied during your previous XXX session.
- The selected collection is applied to the dashboard tiles and any visualizations that are opened.

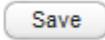
Create a New Collection

You may create as many collections as needed to analyze your studies.

1. Click **New** from the Options menu to start creating a collection.

Note:

Adhoc Collection # (Unsaved) is added to the Collections drop-down list. This is how all new collections start.

2. Click **Save As** from the Options menu to give the collection a name.
3. Type a unique collection name in the Name box.
4. Click . The saved collection is displayed in the Collections drop-down box. You are now ready to add protocols to the collection.

Add a Protocol or Site – Using Add Function

Use the Add function when you know the protocol/site number.

1. Click **Add**.
2. Type the protocol/site name or number. As you type, the protocols/sites that match your entry are listed.
3. Select the protocol/site to be added to the collection. The selected protocol/site is displayed in the Protocols/Sites list.
 - Only one protocol/site can be selected at a time using the Add link.
 - "More..." is displayed if all protocols/sites matching your entry do not fit in the list. When clicked, the Advanced Protocol/Site Search window is displayed to make your protocol/site selection(s).

Add a Protocol or Site – Using Advanced Search

Use the Advanced Search function when using multiple search criteria and/or selecting multiple protocols/sites at one time.

Note:

Since the Clinical dashboard contains tiles that focus on sites, its Collections area provides the option to select specific sites.

1. Click **Advanced Search**.
2. Enter the criteria in the corresponding search field(s). If typing the criteria, press Enter to start the search.
 - Quick Search finds Protocol Numbers that *begin* with the criteria typed in the Quick Search field.
 - Criteria typed in the Protocol Number field finds protocols with that criteria *anywhere* in the protocol number.

Protocol Number	Project Code	Site	Site Type	Subject Data	National Data	Sponsor	Phase
1F00000124	000123					ABC Pharma	
1F00000125	000123					ABC Pharma	Phase 1
1F00000126	000123					ABC Pharma	Not Available
1F00000128	000123					XYZ Research	Phase 1
1F00000130	000123					ABC Pharma	Phase 2
1F00000132	000123					ABC Pharma	Not Available
1F00000134	000123					ABC Pharma	Phase 2
1F00000136	000123					ABC Pharma	Phase 2
1F00000138	000123					ABC Pharma	Phase 2
1F00000140	000123					ABC Pharma	Phase 2
1F00000142	000123					ABC Pharma	Phase 2
1F00000144	000123					ABC Pharma	Phase 2
1F00000146	000123					ABC Pharma	Phase 2
1F00000148	000123					ABC Pharma	Phase 2
1F00000150	000123					ABC Pharma	Phase 2

Note:

To remove the search criteria, delete the text in the search field(s) and press Enter.

3. Use the following tips to sort protocols/sites in the Advanced Search window.
 - Click a column heading to sort the data in ascending or descending order.
 - To identify protocols with or without subject level data, use the Subject Data Available drop-down list.

- Click the column selector to view the fields available for searching and sorting protocols. The column selector is used to add and remove columns from the table.
 - You must add protocols to the collection before you can add sites.
 - To select all active sites for a protocol within a country, click the Site Number heading to sort the sites. The site with numbers, not TBD sites will be shown first and can be easily selected.
 - The Current Site Status field is commonly used for sorting.
4. Click the protocol and/or site row(s) to be included in your collection. As rows are selected, they are added to the Protocols/Sites list, on the left.
 - To select multiple contiguous rows, click the first protocol/site in the group, hold the **Shift** key, and click the last protocol/site in the group.
 - To select multiple non-contiguous rows, click the first protocol/site row in the group, hold the **Ctrl** key, then click additional row(s).
 5. Click **Save**. The Collection Note is replaced with populated tiles based on the selected collection.

Note:

The expand  and collapse  symbols show and hide the protocol list.

Apply a Collection

- Once a collection is created, you can apply it to the dashboard tiles by selecting it from the Collections drop-down list. The tiles are updated based on the applied collection.
- A Collections drop-down list, located in the top right corner, is also available when viewing any visualization.

Edit a Collection

Collections are **automatically saved** after each change you make to them. Any change made to a collection is reflected in the dashboard tiles and any visualization that is opened.

Add Protocols/Sites

You can [add protocols and sites](#) to an existing collection in the same manner as when creating the collection.

Delete Protocols

Click **x** to remove the protocol or site from the collection. After removing a protocol or site, the collection is automatically saved and the tiles are updated to reflect the removal.

If you want the protocol or site in the collection after clicking **x**, you must use the [Add](#) or [Advanced Search](#) links.

Temporarily Remove Protocols/Sites

Temporary removal of protocols/sites in a collection is only applicable to dashboard tiles. Use the Filters panel to make changes to a visualization.

- Click the protocol or site number to temporarily remove them from the collection. The protocol and site numbers are struck through when temporarily removed from the collection.
- Click the number again to include them in the collection.

Copy a Collection

You can copy an existing collection and modify it to include or exclude additional protocols/sites.

1. Select the collection to be copied from the Collections drop-down list.
2. Click **Copy** on the Options drop-down list. Adhoc Collection # (Unsaved) is added to the Collections drop-down list.
3. Select **Save As** from the Options drop-down list and save the collection as a new name. ([See the steps for saving.](#))
4. The copied collection can now be edited as needed. ([See the steps for editing.](#))

Delete a Collection

You can delete collections that are no longer of use to you.

1. Select the collection to be deleted from the Collections drop-down list.
2. Click **Delete** on the Options drop-down list.
3. Click **OK** to confirm the deletion. The collection is removed from the Collections drop-down list.

XXX Home Page

← BACK TO PORTAL

Welcome [redacted] | [Log Out](#)

2 MY DASHBOARD 3 SPONSOR 4 LIBRARY 5 HELP

1 **COLLECTIONS** [Hide Collections](#) [+ Hidden Tiles](#) [7 Related Visualizations](#)

All My Data [Options](#)

> Protocols

Milestones Status

Actual On Time	24620
Actual Overdue	11878
Projected On ...	8091
Projected Late	5473

Site Count by Region

Studies by Status

Completed	71
Std Data Not ...	4850
Enrolling	2375
Planning	1098
Discontinued	970
Proposed	636
In Development	361
Closed To En...	332
Closed Follow...	169
On Hold	144
Open To Enro...	43
Test	43

8

9 **Sites Initiated**

2232	3242	2829	3043	2347	2551
------	------	------	------	------	------

10 **Studies by Therapeutic Unit**

Hematology/...	335
Not Specified	1834
Neurology	1711
Infectious Dis...	1467
Not Available	1418
Endocrinology	1413
Std Not Avai...	1261

XXX Home Page continued

1 Collections

The Collections area allows you to change the selected protocols and sites that are represented in the tiles and visualizations. Protocol and site selections can be saved as Collections and selected from the drop-down list. [See more.](#)

2 My Dashboard

The My Dashboard link displays your custom dashboard.

- You can create this dashboard by marking tiles that are of particular interest to you.
- Tiles are added to My Dashboard by clicking ★ in the tile Settings.

3 Sponsor

The Sponsor link displays the Sponsor's dashboard. This dashboard contains sponsor-specific tiles that provide key insights into selected protocols and sites.

Tiles can be hidden from the dashboard. To redisplay them, click Hidden Tiles, then click the tile name from the list.

4 Library

The Library link displays a list of all visualizations available to you.

- The Name column provides links to each visualization.
- The Collection columns indicate visualization categories such as protocol or site.
- The Help column provides links to the Visualization Guidance (VG) for the related visualization.

5 Help

The Help link displays the areas of support available to you.

6 Hidden Tiles

You can redisplay a tile by clicking Hidden Tiles, then clicking the tile name from the list.

Tiles are hidden by clicking - in the tile Settings to hide them from view.

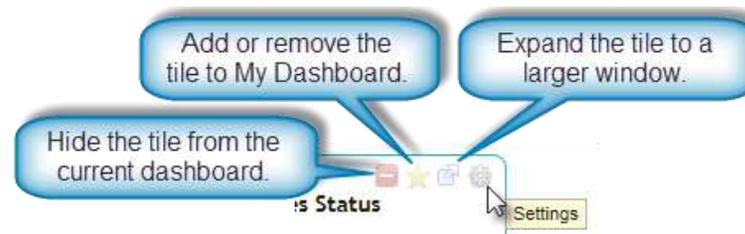
7 Related Visualizations

The Related Visualizations link displays a list of visualizations that make up the tiles shown in the currently viewed dashboard.

- Some tiles are made up of more than one visualizations.
- Some visualizations are not represented by a tile.

8 Settings

Hover over the Settings button to display the viewing options for a tile.



9 Tile Titles

Some tiles are linked to related visualizations for further analysis of the study data. You can click the title to open the visualization. Other tiles present study and site data without linking to a visualization.

- A tile symbol is displayed to indicate the tile is linked to a visualization.
- When linked to a visualization, the tile title is blue and underlined.
- Hover over the tile title to show the related visualization name.
- Non-linked tile titles are black and are not underlined.

10 Tiles

The tiles shown on a dashboard provide you with a quick overview of key study data that will assist you in managing your studies. [See more.](#)

- Some tiles are linked to related visualizations for further analysis of study data. Other tiles are not linked to a visualization.
- Some visualizations in the Library are not represented by a tile.
- Tiles represent data pulled from the associated data source(s).
- Tiles cannot be modified or rearranged.
- Tiles can be hidden. To redisplay a tile, click Hidden Tiles, then click the tile name from the list.