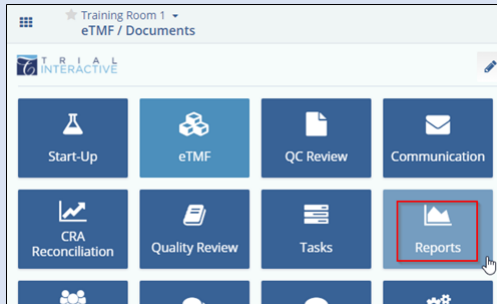**TRIAL INTERACTIVE**

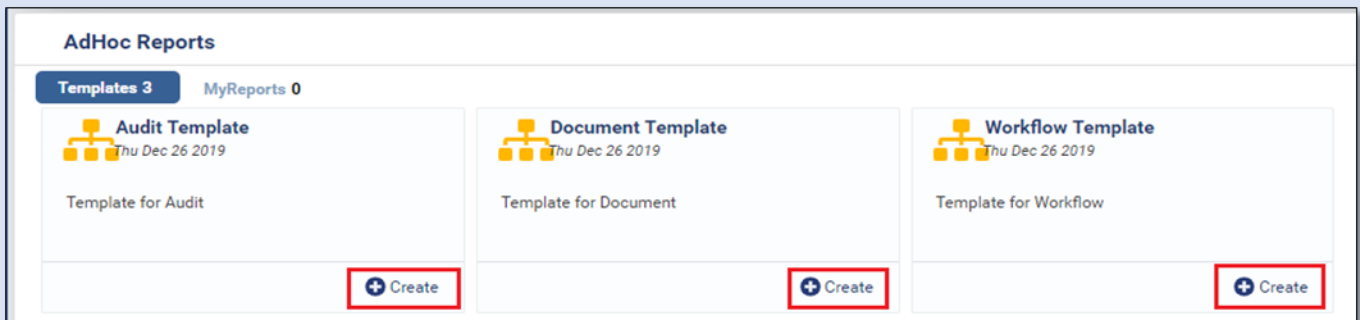**APPLICABLE TO:** ● All Users   ● eTMF   ● Study Start-Up

**1. Login to a room and navigate to the Reports application in the Navigation Grid.**

📝 Note: The **Adhoc Report List** dashlet lists available **Standard Configurable Reports**. Users can create their own reports, called **AdHoc Reports**, from templates.
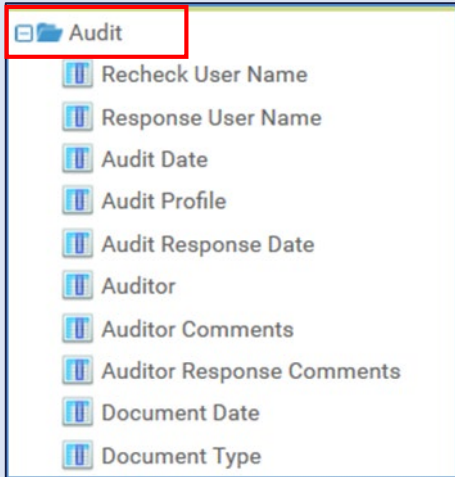
2. Click Create next to a template from the AdHoc Report List dashlet.

💡 If more than one domain (i.e. Audit, Document, Workflow) is needed for reporting, contact your Trial Interactive rep for a custom report.
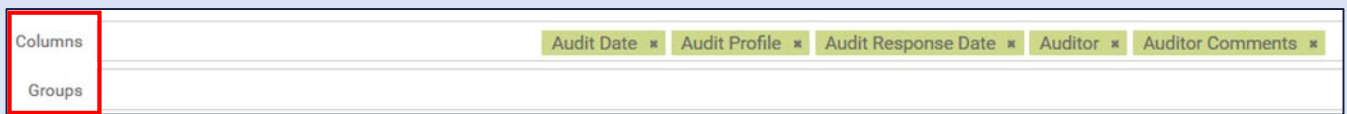
3. Select Table and Full Data from the drop-down menus.

TRANSPERFECT
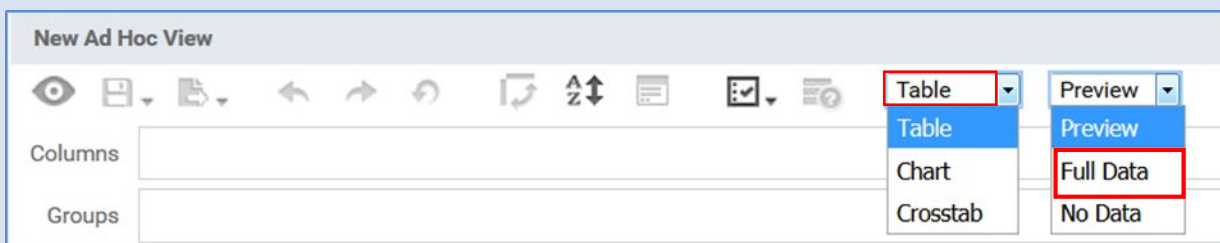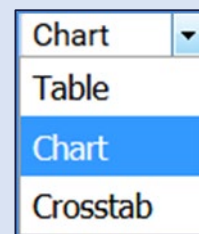
4. Expand the domain to see the fields in the left hand corner.

5. Drag and drop fields into **Columns** or **Groups** sections.

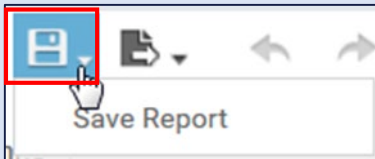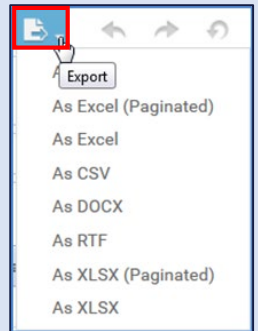A tabular report is generated based on the selection.

6. If desired, change the view selection to see the report as a **Chart** or **Crosstab**.
The view is displayed accordingly.

7. Click on the Export menu and choose a format from the list to generate the AdHoc Report.

Export
As Excel (Paginated)
As Excel
As CSV
As DOCX
As RTF
As XLSX (Paginated)
As XLSX

Save Report

8. Click Save Report to keep it for future access.

Save Report

Name (required):

Audit Template

Description:

New Audit Report

Save   Cancel

9. Enter the report name and click Save.

10. Return to the room tab in your browser to view the saved report under My Reports.

AdHoc Reports

Templates 4   MyReports 2

Demo
Mon Feb 17 2020

Test Report
Thu Feb 20 2020

Test