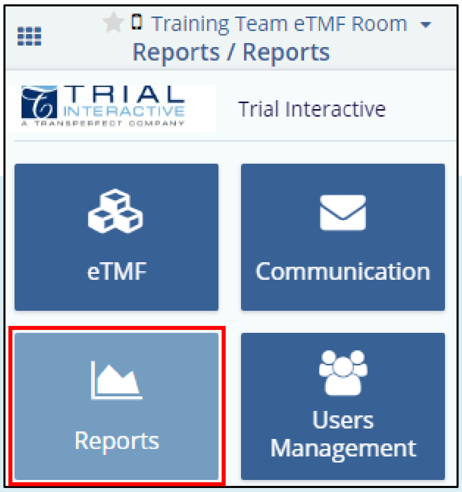
How to Create an Ad-Hoc Report TI v 10.4

TRIAL INTERACTIVE

APPLICABLE TO:

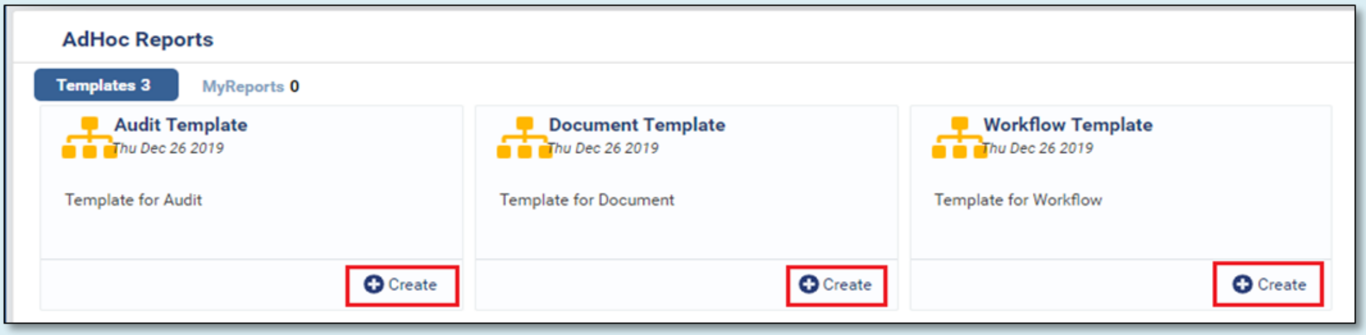
- All Users
- eTMF
- Study Start-Up



Users can create their own reports, called **AdHoc Reports**, starting from templates available in TI.

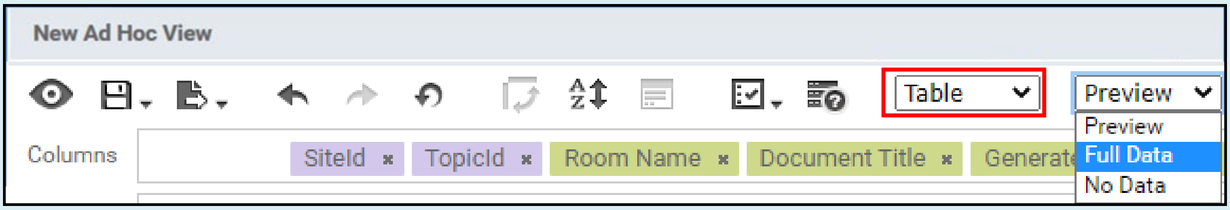
1. Login to a room and navigate to the **Reports** application in the Navigation Grid.

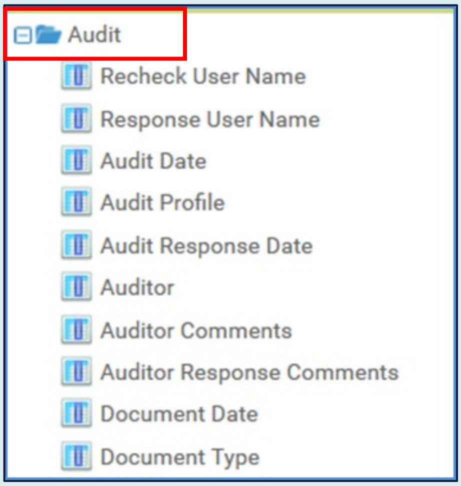
2. Click **Create** under a template from the **AdHoc Reports** dashlet.



If more than one domain (i.e. Audit, Document, Workflow) is required for reporting, contact your Trial Interactive rep for a custom report.

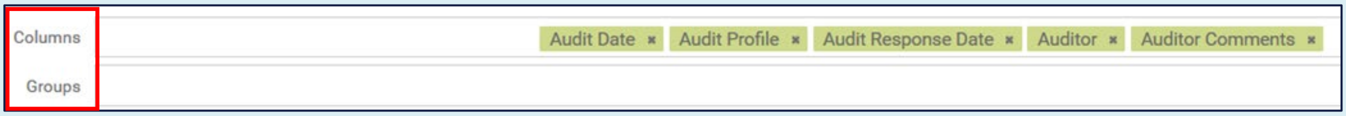
3. Select **Table** and **Full Data** from the drop-down menus.





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

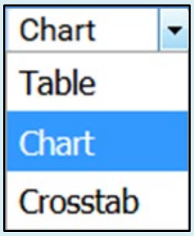
5. Drag and drop fields into **Columns** or **Groups**, according to where you want them to display in the report.



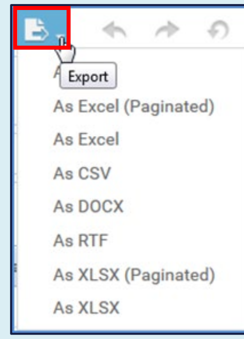
Audit Date	Audit Profile	Audit Response Date	Auditor	Auditor Comments
Mar 20, 2018	Audit Percentage		testAudit4567@ti.com	Document is added into the audit profile
Mar 20, 2018	Audit Percentage		testAudit456@ti.com	Document is added into the audit profile
Mar 20, 2018	Audit Percentage		testAudit456@ti.com	Document is added into the audit profile
Mar 20, 2018	Audit Percentage		testAudit4567@ti.com	Document is added into the audit profile
Mar 20, 2018	Audit Percentage		testAudit456@ti.com	Document is added into the audit profile
Mar 20, 2018	Audit Percentage		testAudit456@ti.com	Document is added into the audit profile
Mar 20, 2018	Audit Percentage		testAudit4567@ti.com	Document is added into the audit profile
Mar 20, 2018	Audit Percentage		testAudit4567@ti.com	Document is added into the audit profile
Mar 20, 2018	Audit Percentage		testAudit4567@ti.com	Document is added into the audit profile

6. A tabular report is generated based on your selection.

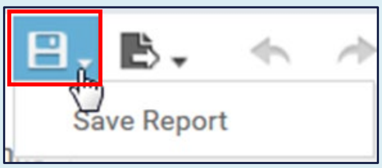
7. If desired, change the view selection to see the report as a **Chart** or **Crosstab**.
The view will be displayed accordingly.



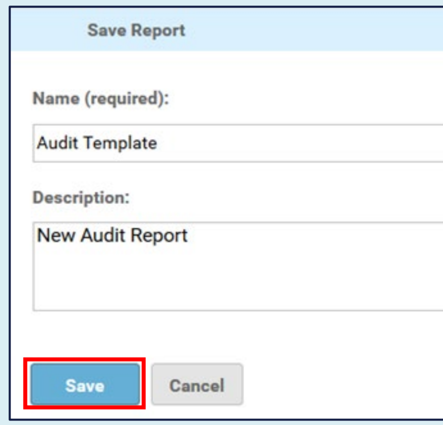
7. Click on the **Export** menu and choose a format from the list to generate the AdHoc Report.



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



9. Enter the report name and click **Save.**



10. Return to the room tab in your browser to view all saved reports under **My Reports.**