



# eClinical OS: Study Designer Training

Data Imports / API Services

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## **Version 5.4.7 Highlights**

There were no updates to the Data Imports or API modules in eClinical OS v5.4.7.



# 1 Overview

### Overview

### Setup

### Data Imports

### API Services

There are times that subject data is collected outside the EDC application and yet the information needs to be incorporated into the study. This often occurs when using central labs, ECG reader facilities, or other vendors, such as IVRS systems. There are two main ways to incorporate the data:

- ◆ You can keep the data separate from the main EDC data and integrate it after the EDC data is exported.
- ◆ You can import the external data into EDC so that it is included in the main study export.

We'll focus on the second option in this module. Imports can be done manually or they can be set up, using the API Services, to be done automatically. If you import data, it must have a CRF page or pages in EDC to be stored in. These pages can be visible to EDC users or hidden -- refer to the Build Tools manual for methods of masking page data.

We'll begin with module setup, then discuss the different options for imports, and finish with the options in the API services -- both interactive and remote.



**IMPORTANT:** If you plan on using the API services for remote access, especially with an automatic transfer, you must work with your Merge Account Manager and Merge IT to set up the connection initially. If the information for server access does not change, this can be re-used from study to study. If the information changes at any time, you must contact your Account Manager to get the connection updated.



### 2

## Setup

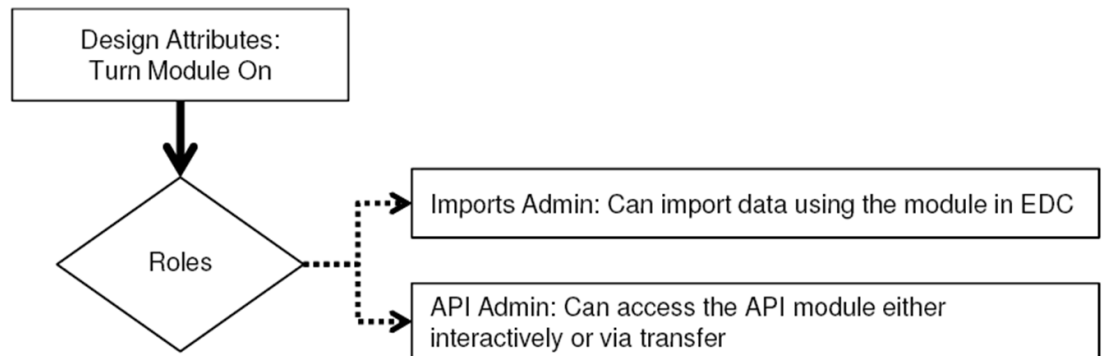
### Overview

### Setup

### Data Imports

### API Services

## Imports / API Setup



### Basic Steps to Configure:

- ◆ Turn the module on
- ◆ Provide high level design attributes
- ◆ Assign permissions to roles
- ◆ Review Page Design and Visit Design for proper mapping of external files



*NOTES: When using Flush/Prepare Study in a design that includes Data Imports and API Services, the flush will:*

- ◆ *DELETE ALL processing logs, records*
- ◆ *DELETE ALL physical files that are stored on the server after upload.*





## 2.1 Design Attributes



**LOCATION:**      **Process → Design Attributes (Optional)**


This turns the module on and provides some general format for the module.

Imports / API:			
expand for attribute descriptions			
Attribute	Value	Comment	
Study Using Imports / API Module?	Yes		History
Import / API Format	API XML V1.0		History
Processing Success Confirmation Emails	emily.malok@merge.com		History
Processing Failure / Error Emails	emily.malok@merge.com		History
Email Option	Only Error Emails		History
Internal User ID for External System Transfer (Numeric)			History
Where the import is coming from?	Central Lab		History

Attribute	Options	Details
Study Using Imports / API Module?	<ul style="list-style-type: none"><li>• Yes</li><li>• Yes - Currently Halted</li><li>• No</li></ul>	This question indicates whether or not the Data Imports/API Services module will be used. The “Yes - Currently Halted” optional allows you to temporarily stop imports or module access once you have started using the module.
Processing Success Confirmation Emails	Free Text	This specifies addresses to receive the successful process email notifications. Use commas to separate multiple email addresses.



## 2.1 Design Attributes

Attribute	Options	Details
Processing Failure / Error Emails	Free Text	This specifies addresses to receive the failure or error in process email notifications. Use commas to separate multiple email addresses.
Import/API Format	<ul style="list-style-type: none"><li>API XML V1.0</li></ul>	This species the format schema to be used for data import files and API calls. More details are available in the Reference section and in the Data Imports/API Services manual.
Email Option	<ul style="list-style-type: none"><li>All</li><li>Only Error Emails</li><li>None</li></ul>	<p>This specifies if users want to receive processing emails.</p> <ul style="list-style-type: none"><li>♦ <u>All</u>: Users specified in the Email fields above will receive all success and failure notifications for an import attempt.</li><li>♦ <u>Only Error Emails</u>: Users specified in the Email fields above will receive only the failure notifications for an import attempt.</li><li>♦ <u>None</u>: Users specified in the Email fields above will not receive notifications for an import attempt.</li></ul>
Internal User ID for External System Transfer	Numeric	This value is the unique internal ID of the user to attribute all actions of files coming to the study using this method. The user must have data imports admin rights, be active in the study, etc. for the file processing to complete.
 <b>IMPORTANT:</b> Use this <b>ONLY</b> if files are fed to system from external systems, and <b>NOT</b> using the tab in the study or web services module.		
Where the import is coming from	Free Text	This allows you to specify what actions will be performed using the Imports/API module. This helps identify what to test when using the Study Testing module.



## 2.2 Roles



**LOCATION:**      **Process ➔ Roles**

The Data Imports and API administrative roles are separate options when you provide role permissions. A role for automated upload and import will need both permissions.

Add New Role: ?

Role Name:

\*

Abbreviation:

\*

Icon:

\*

Can Add/Edit Subject Information?

☐

(includes editing revision of a subject)

Can Add/Edit Page Data / Page Links?

☐

Can Sign Pages?

☐

Can Add Query?

☐

Can Edit Query?

☐

Can Source Doc Verify (SDV)?

☐

Can Delete/Restore Pages?

☐

Can Delete/Restore Subjects?

☐

Can Upload Files to CRFs?

☐

Can Upload Site Documents?

☐

Unblinded Role?

☐

(applies to page / site document uploads where blinding indicated, plus randomization/stratification and dispensing)

Data Imports Admin?

☐

(can view/upload data import files)

API Admin?

☐

(can use eClinical OS API web servicing)

Uploads Admin?

☐

(can delete other users site or CRF attachments)

+ Add

Role Permissions	Options	Details
Data Imports Admin?	Checkbox	This permission allows users to access the Imports/API tab in EDC and view or upload data import files.
API Admin?	Checkbox	This permission allows users to access the interactive mode in EDC to review format without producing web services calls on the user's side. It also enables the user to use the API Information Services in true web servicing mode (server to server XML).



## 2.2 Roles

Based on the administration roles selected, the user will have an Import/API tab, Imports tab, or API tab added to their EDC view.

### DATA IMPORTS ADMIN ONLY



STAR - Malok



### API ADMIN ONLY



STAR - Malok



### BOTH DATA IMPORTS AND API ADMIN



STAR - Malok





## 2

## Practical Exercise

## DAISY

## Access for Data Imports and API

1. Click Design Attributes (Optional) on the Process menu.
2. In the Imports/API Module section, enter the following details:

Attribute	Enter This....
Study Using Imports/API Module	Yes
Import/API Format	API XML V1.0
Processing Success Confirmation Emails	[ <i>Use Your Email Address</i> ]
Processing Failure/Error Emails	[ <i>Use Your Email Address</i> ]
Email Option	All
Internal User ID for External System Transfer (Numeric)	< leave blank >
Where the import is coming from?	< leave blank >

3. Click Update.
4. Click Roles on the Process menu.
5. For the Administrator role, in the Admin Rights column, check the Data Imports box and the API box.
6. Click Save Row.



### 3 Data Imports

Overview

Setup

Data Imports

API Services

On the main screen module screen in EDC, you will be able to do the following:

- ◆ Sort or Filter items recent items. The default display is “Last 7 Days”.
- ◆ Access an Upload area if you have Data Import Admin permission
- ◆ Access the Interactive API area if you have the API Admin permission

The screenshot shows the 'Data Imports' interface. At the top, there are filters for 'Dates: Last 7 Days', 'Status: All', and '#: 100'. There is a 'View' button and an 'Upload' button. Below the filters, a blue header bar indicates 'Files Processed : 2 record(s)'. The main table is titled '(Interactive API Viewer)' and contains the following data:

Processing ID	File	Status	Last Mod Date	Upload By	Upload Date	Upload Comments	Processing Log Sent To	Processing Comments	Log
1188	<a href="#">Enk_ADD1 - Copy.txt</a>	Complete	16-MAR-13 17:29:24 EDT	Malok, Emily [DES]	16-MAR-13 17:29:24 EDT		emily.malok@merge.com		<a href="#">View</a>
1193	<a href="#">Enk_SUBJ - Copy.txt</a>	Complete	16-MAR-13 17:29:24 EDT	Malok, Emily [DES]	16-MAR-13 17:29:24 EDT		emily.malok@merge.com		<a href="#">View</a>

The Files Processed table is the main feature on the page. It contains details about each file, such as:

- ◇ Unique Processing ID, which is provided by the system when uploaded
- ◇ File Name, which is hyperlinked to view the file
- ◇ Status of Completed (green) or Failed (red)
- ◇ Last Modified Date
- ◇ Upload By
- ◇ Upload Date
- ◇ Upload Comments
- ◇ Email address where the processing log was sent
- ◇ Any processing comments
- ◇ A link to view the processing log



## 3.1 File View Filters

You can use the filters to help locate and view import files

Filter	Options
Dates	This specifies a time frame for the import files: <ul style="list-style-type: none"><li>• All</li><li>• Last 3 Days</li><li>• Last 7 Days (default)</li><li>• Last 30 Days</li></ul>
Status	This specifies the status of the file: <ul style="list-style-type: none"><li>• All</li><li>• New</li><li>• Not Complete</li><li>• Complete</li><li>• FAILED</li></ul>
#	This is the number of results to display: <ul style="list-style-type: none"><li>• 50</li><li>• 100</li><li>• 1000</li><li>• All</li></ul>
Column	These three fields are used in conjunction to narrow the file list:
Field 1	This is the column that will be filtered by: <ul style="list-style-type: none"><li>• Processing ID</li><li>• File</li></ul>
Field 2	This is the operator to set the criteria: <ul style="list-style-type: none"><li>• Contains</li><li>• = (equals)</li><li>• &gt; (greater than)</li><li>• &gt;= (greater than or equal to)</li><li>• &lt;= (less than or equal to)</li><li>• &lt; (less than)</li><li>• &lt;&gt; (does not equal)</li></ul>
Field 3	This is the free text value field for the criteria.



## 3.2 Importing Files Manually

### To Upload a File for Import:

Step	Details
1	Click the Upload button on the main Import page.
2	Use the Browse button to open the window and locate your file on your local machine.
Optional	Provide a comment or description for the file.
3	Click the Upload button again.



#### NOTES:

- *File names must be unique for all uploads. If an updated file of a previously failed import is being uploaded, the file name must be of a different name - example: '\_UpdateYYYY-MM-DD' included in the name.*
- *Use a .zip file for multiple files at once (no subfolders in the zip file). After upload, the system will extract and process each file individually.*
- *Time to Process: Each item for processing can take 1-3 seconds to complete. Total number of items in a series of files should be considered when understanding the time to process.*



**IMPORTANT:** Good practice is to use file 'per item' -- better for traceability, and better for speed of parsing files. If multiple items are used in a file, the total in one file should be typically less than 500 items.

For details on automatically importing files, see the API section later in this manual.





## 3.3 General Tips - All Types

- ◆ Each type of file import has error checking as noted in each section.
- ◆ There is one stage of XML parsing checking that takes place first.
- ◆ If any of that fails, the issues are reported, with the action aborted.
- ◆ Only after all parsing checks succeeds, does additional study design level checking take place.
- ◆ Multiple <item> sections can appear in one file, or users may choose to do ‘one item per file’ for clarity in reporting / logs at the IMPORTS tab in EDC.
  - ◇ type : The type of item to process (e.g. ADD\_SUBJECT)
  - ◇ studyid : The internal ID within eClinical OS for the study.
- ◆ All processed items will have audit trail that refers to the file name where the source of that data came from.



## 3.4 Error Checking

**For ALL TYPES:**

- ◆ Valid XMLformat
- ◆ Missing type
- ◆ Unknown type
- ◆ Missing subjectid AND subjectidentifier (one is needed, but not both)
- ◆ subjectid given, but not numeric
- ◆ subjectidentifier given, but not numeric
- ◆ subjectidentifier given, but not matching a subject identifier in the study
- ◆ User uploading the file MUST:
  - ◇ Have an active study account
  - ◇ Be associated to a site / organization in the study that is active.
  - ◇ Study must not be Closed



## 3.5 Single vs. Multiple Records

### One Item within a file

```
<ecos-dataprocesitems>
  <item type="ADD_SUBJECT">
:
(study specific details)
:
  </item>
</ecos-dataprocesitems>
```

### Multiple Items within a file

```
<ecos-dataprocesitems>
  <item type="ADD_SUBJECT">
:
(study specific details)
:
  </item>
  <item type="ADD_SUBJECT">
:
(study specific details)
:
  </item>
  <item type="ADD_SUBJECT">
::
(study specific details)
:
  </item>
</ecos-dataprocesitems>
```



## 3.6 ADD\_SUBJECT

### Purpose

Used to add a subject if a subject doesn't previously exist (i.e. the Subject Identifier / Number)

### Sample File

```
<myedc-dataprocessitems>
  <item type="ADD_SUBJECT">
    <subjectidentifier>102007</subjectidentifier>
    <subjectidentifier2>007</subjectidentifier2>
    <subjectidentifier3>2011-04-13</subjectidentifier3>
    <add_revisionnumber>1</add_revisionnumber>
    <sitenumber>102</sitenumber>
    <statusid></statusid>
    <statusname></statusname>
    <comment>This is a retro add .. via the CTMS system on April 18th</comment>
  </item>
</myedc-dataprocessitems>
```

### Field Specifics

Field	Description / Notes	Error Checking at File XML Parsing	Error Checking After XML Parse
<i>subjectidentifier</i>	The Subject Number/ Identifier of the added subject	<ul style="list-style-type: none"><li>Numeric</li><li>Required</li></ul>	<ul style="list-style-type: none"><li>Doesn't match existing number</li><li>Must satisfy the length format if design attributes dictate. (non- 'Free Text Entry')</li><li>NOTE: Does <b>NOT</b> validate against the Study Wide or Site Level formatting of the identifier. The creator of this file should be following those rules.</li></ul>



## 3.6 ADD\_SUBJECT

### Field Specifics (continued)

Field	Description / Notes	Error Checking at File XML Parsing	Error Checking After XML Parse
<i>subjectidentifier2</i>	If used, the 2 <sup>nd</sup> subject identifier		<ul style="list-style-type: none"><li>• If used, and Text Field or Date - required</li><li>• If Text Field format, 100 character max</li><li>• Date type: YYYY-MM-DD format</li><li>• Check Box type: 'X' or empty are only valid usages</li></ul>
<i>subjectidentifier3</i>	If used, the 3 <sup>rd</sup> subject identifier		<ul style="list-style-type: none"><li>• If used, and Text Field or Date - required</li><li>• If Text Field format, 100 character max</li><li>• Date type: YYYY-MM-DD format</li><li>• Check Box type: 'X' or empty are only valid usages</li></ul>
<i>add_revisionnumber</i>	Revision number for the add	<ul style="list-style-type: none"><li>• Numeric</li><li>• Required only if multiple revisions with "Add" exist for the site</li></ul>	<ul style="list-style-type: none"><li>• Matches a revision ID from study design</li></ul>
<i>sitenumber</i>	Site the subject is associated with	<ul style="list-style-type: none"><li>• Numeric</li><li>• Required</li></ul>	<ul style="list-style-type: none"><li>• Matches a site number in the study</li><li>• Site has Can Add rights with the revision</li><li>• Overall Study Cap not met (non-deleted subjects)</li><li>• Site Cap not met (non-deleted subjects)</li></ul>



## 3.6 ADD\_SUBJECT

### Field Specifics (continued)

Field	Description / Notes	Error Checking at File XML Parsing	Error Checking After XML Parse
<i>statusid</i>	Optional - status of subject after add. If ID nor name are passed, status of subjects takes the first status of study design.		<ul style="list-style-type: none"><li>• If passed, numeric</li><li>• If passed, matches an ID from Subject Status design area.</li></ul>
<i>statusname</i>	Optional – status of subject after add.		<ul style="list-style-type: none"><li>• If used, matches a status name in the Subject Status design area.</li></ul>
<i>comment</i>	Optional - comment to add to the audit trail as part of the subject add.	<ul style="list-style-type: none"><li>• If given, 3700 maximum</li></ul>	<ul style="list-style-type: none"><li>•</li></ul>
<i>skip_if_exists</i>	Optional – allows import process to continue without a registered error if the subject already exists	<ul style="list-style-type: none"><li>• “true” or “false”</li></ul>	<ul style="list-style-type: none"><li>• “false” is default if missing</li></ul>



## 3.7 EDIT\_SUBJECT\_INFO

### Purpose

Used to edit a subject's main information, change site, delete, restore, and/or comment. For example, when using a 2nd subject identifier classified as a screening number and 3rd subject identifier classified as an Informed Consent Date.

### Sample File

```
<ecos-dataprocessitems>
  <item type="EDIT_SUBJECTINFO">
    <subjectid></subjectid>
    <subjectidentifier>102004</subjectidentifier>
    <subjectidentifier2>12345</subjectidentifier2>
    <subjectidentifier3>2011-04-12</subjectidentifier3>
    <sitenumber>102</sitenumber>
    <statusid></statusid>
    <statusname>Enrolled</statusname>
    <edit_subject_deletedvalue></edit_subject_deletedvalue>
    <comment>This is a retro add .. via the CTMS system on April 18th</comment>
  </item>
</ecos-dataprocessitems>
```

### Field Specifics

Field	Description / Notes	Error Checking at File XML Parsing	Error Checking After XML Parse
<i>subjectid</i>	The internal subject ID of the subject. Pass this with a different subject identifier to have a subject number/identifier changed	<ul style="list-style-type: none"><li>Numeric (if passed)</li><li>One of ID or Identifier Required</li></ul>	



## 3.7 EDIT\_SUBJECT\_INFO

### Field Specifics (continued)

Field	Description / Notes	Error Checking at File XML Parsing	Error Checking After XML Parse
<i>subjectidentifier</i>	The Subject Number/ Identifier of the added subject	<ul style="list-style-type: none"><li>Numeric (if passed)</li><li>One of ID or Identifier Required</li></ul>	<ul style="list-style-type: none"><li>If passed, must match existing subject number</li><li>Must satisfy the length format if design attributes dictate. (non-‘Free Text Entry’)</li><li>NOTE: Does <b>NOT</b> validate against the Study Wide or Site Level formatting of the identifier. The creator of this file should be following those rules.</li></ul>
<i>subjectidentifier2</i>	If used, the 2 <sup>nd</sup> subject identifier		<ul style="list-style-type: none"><li>If used, and Text Field or Date - required</li><li>If Text Field format, 100 character max</li><li>Date type: YYYY-MM-DD format</li><li>Check Box type: ‘X’ or empty are only valid usages</li></ul>
<i>subjectidentifier3</i>	If used, the 3 <sup>rd</sup> subject identifier		<ul style="list-style-type: none"><li>If used, and Text Field or Date - required</li><li>If Text Field format, 100 character max</li><li>Date type: YYYY-MM-DD format</li><li>Check Box type: ‘X’ or empty are only valid usages</li></ul>





## 3.7 EDIT\_SUBJECT\_INFO

### Field Specifics (continued)

Field	Description / Notes	Error Checking at File XML Parsing	Error Checking After XML Parse
<i>sitenumber</i>	Site the subject is associated with	<ul style="list-style-type: none"><li>Numeric</li><li>Required</li></ul>	<ul style="list-style-type: none"><li>Matches a site number in the study</li><li>Overall Study Cap not met (non-deleted subjects)</li><li>Site Cap not met (non-deleted subjects)</li></ul>
<i>statusid</i>	Optional - status of subject as part of update. If ID nor name are passed, no status change is made		<ul style="list-style-type: none"><li>If passed, numeric</li><li>If passed, matches an ID from Subject Status design area.</li></ul>
<i>statusname</i>	Optional – status of subject as part of update. Pass empty ID/name for no change.		<ul style="list-style-type: none"><li>If passed, matches a status name in the Subject Status design area.</li></ul>
<i>comment</i>	Required - comment to add as part of update	<ul style="list-style-type: none"><li>Required</li><li>3700 characters maximum</li></ul>	

(continued on next page)



## 3.7 EDIT\_SUBJECT\_INFO

### Field Specifics (continued)

Field	Description / Notes	Error Checking at File XML Parsing	Error Checking After XML Parse
<i>edit_subject_deletedvalue</i>	<p>Used to delete or restore a subject. Pass EMPTY to not have this aspect updated.</p> <p><b>IMPORTANT NOTE:</b> The pass of a value to this field results in ONLY that update in the &lt;item&gt;. If other subject level information needs updating, use a second &lt;item&gt; processing section.</p>	<ul style="list-style-type: none"><li>Only <b>true</b> or <b>false</b> can be passed, if passed, true = subject is marked deleted in EDC</li></ul>	<ul style="list-style-type: none"><li>If a restore, checks that Study Cap not met</li><li>If a restore, checks that Site Cap not met</li></ul>



## 3.8 ADD\_QUERY

### **Purpose**

Used to add a new query to a page/control within a subject's CRF pages.



### *NOTES:*

- ◆ *The subject must be both non-deleted and not in a Subject Status that is 'Data Read Only'*
- ◆ *Visit ID / Visit Sequence / Page ID / Page Sequence are per the visit schedule design of the subject's current Revision. Visit Sequence and Page Sequence are '0' for non repeating visits or pages and non-zero for repeating visits or pages.*
- ◆ *The system does NOT halt the add of a query should one of that type already exist at that location.*

### **Sample File**

```
<ecos-dataprocessitems>
  <item type="ADD_QUERY">
    <subjectid></subjectid>
    <subjectidentifier>102004</subjectidentifier>
    <visitid>10</visitid>
    <visitseq>0</visitseq>
    <pageid>30</pageid>
    <pageseq>0</pageseq>
    <controlid></controlid>
    <controltablecolumn>DEMO.DOB</controltablecolumn>
    <querytypename>Site Query</querytypename>
    <querystatusname> </querystatusname>
    <add_query_subject>Subject line should read this text</add_query_subject>
    <add_query_details>Some details added</add_query_details>
  </item>
</ecos-dataprocessitems>
```



## 3.8 ADD\_QUERY

### Field Specifics

Field	Description / Notes	Error Checking at File XML Parsing	Error Checking After XML Parse
<i>subjectid</i>	The internal subject ID of the subject.	<ul style="list-style-type: none"><li>Numeric (if passed)</li><li>One of ID or Identifier Required</li></ul>	<ul style="list-style-type: none"><li><b>NOTE:</b> Subject MUST be non-deleted and in a Subject Status that is not 'Data Read Only', for this type of update.</li></ul>
<i>subjectidentifier</i>	The Subject Number/ Identifier of the added subject	<ul style="list-style-type: none"><li>Numeric (if passed)</li><li>One of ID or Identifier Required</li></ul>	<ul style="list-style-type: none"><li>If passed, must match existing subject number</li></ul>
<i>visitid</i>	Visit ID	<ul style="list-style-type: none"><li>Numeric</li><li>Required</li></ul>	<ul style="list-style-type: none"><li>Matches an ID from the subject's current schedule of pages</li></ul>
<i>visitseq</i>	Visit Sequence	<ul style="list-style-type: none"><li>Numeric</li><li>Required</li></ul>	<ul style="list-style-type: none"><li>Matches a sequence from the subject's current schedule of pages</li><li>USE_LAST_VISIT_SEQUENCE (see 3.14 Details about USE_LAST attributes)</li></ul>
<i>pageid</i>	Page ID	<ul style="list-style-type: none"><li>Numeric</li><li>Required</li></ul>	<ul style="list-style-type: none"><li>Matches an ID from the subject's current schedule of pages</li></ul>
<i>pageseq</i>	Page Sequence	<ul style="list-style-type: none"><li>Numeric</li><li>Required</li></ul>	<ul style="list-style-type: none"><li>Matches a sequence from the subject's current schedule of pages</li><li>USE_LAST_PAGE_SEQUENCE (see 3.14 Details about USE_LAST attributes)</li></ul>



## 3.8 ADD\_QUERY

### Field Specifics (continued)

Field	Description / Notes	Error Checking at File XML Parsing	Error Checking After XML Parse
<i>querytypeid</i>	Type ID of the Query to add	<ul style="list-style-type: none"><li>Numeric (if passed)</li><li>One of ID or Type required</li></ul>	<ul style="list-style-type: none"><li>If passed, numeric</li><li>If passed, matches an ID from Query Types design area.</li><li><b>Cannot</b> a type 'System Query' (ID=0), that is reserved for eClinical OS system queries. Suggest using a new Query Type in the study design for imported queries</li></ul>
<i>querytypename</i>	Type Name of the Query to add	<ul style="list-style-type: none"><li>One of ID or Type required</li></ul>	<ul style="list-style-type: none"><li>If passed, must match a type name from Query Types design area.</li><li><b>Cannot</b> a type 'System Query' (ID=0), that is reserved for eClinical OS system queries. Suggest using a new Query Type in the study design for imported queries</li></ul>
<i>statusid</i>	Optional - status ID of query as part of add. If neither ID nor Status passed, first status of query is set on the add.	<ul style="list-style-type: none"><li>Numeric (if passed)</li></ul>	<ul style="list-style-type: none"><li>If passed, matches a status from that type of Query.</li></ul>

(continued on next page)



## 3.8 ADD\_QUERY

### Field Specifics (continued)

Field	Description / Notes	Error Checking at File XML Parsing	Error Checking After XML Parse
<i>statusname</i>	Optional, status name of query as part of add. If neither ID nor Status passed, first status of query is set on the add.		<ul style="list-style-type: none"><li>If passed, matches a status name from that type of Query.</li></ul>
<i>controlid</i>	Which control – ID from page design – to attach the query to. (pass one of ID or table.column)	<ul style="list-style-type: none"><li>If passed, must be numeric</li><li>One of controlid or controltable-column must be indicated</li></ul>	<ul style="list-style-type: none"><li>If given, matches a controlID from the page design at the location in the subject's visit schedule</li></ul>
<i>controltablecolumn</i>	Which control -Table.Column from page design – to attach the query to. (pass one of ID or table.column)	<ul style="list-style-type: none"><li>One of controlid or controltable-column must be indicated</li></ul>	<ul style="list-style-type: none"><li>If given, matches a Table.Column control from the page design at the location in the subject's visit schedule</li></ul>
<i>add_query_subject</i>	The subject line of the query	<ul style="list-style-type: none"><li>Required</li><li>Max 250 characters</li></ul>	
<i>add_query_details</i>	The query details	<ul style="list-style-type: none"><li>Required</li><li>Max 3700 characters</li></ul>	



## 3.9 EDIT\_QUERY

### Purpose

Used to edit an existing query in the study.



*NOTES: The subject must be both non-deleted and not in a Subject Status that is 'Data Read Only'*

### Sample File

```
<ecos-dataprocessitems>
  <item type="EDIT_QUERY">
    <subjectid></subjectid>
    <subjectidentifier>102004</subjectidentifier>
    <querystatusid></querystatusid>
    <querystatusname>Site Answered</querystatusname>
    <edit_query_id>2</edit_query_id>
    <edit_query_subject>New subject to set #2, with status name
      change</edit_query_subject>
    <edit_query_comments>Some details on edit</edit_query_comments>
  </item>
</ecos-dataprocessitems>
```

### Field Specifics

Field	Description / Notes	Error Checking at File XML Parsing	Error Checking After XML Parse
<i>subjectid</i>	The internal subject ID of the subject.	<ul style="list-style-type: none"><li>Numeric (if passed)</li><li>One of ID or Identifier Required</li></ul>	<ul style="list-style-type: none"><li><b>NOTE:</b> Subject MUST be non-deleted and in a Subject Status that is not 'Data Read Only'</li></ul>
<i>subjectidentifier</i>	The Subject Number/ Identifier of the added subject	<ul style="list-style-type: none"><li>Numeric (if passed)</li><li>One of ID or Identifier Required</li></ul>	<ul style="list-style-type: none"><li>If passed, must match existing subject number</li></ul>



## 3.9 EDIT\_QUERY

### Field Specifics (continued)

Field	Description / Notes	Error Checking at File XML Parsing	Error Checking After XML Parse
<i>querystatusid</i>	Optional - status ID of query as part of add. If neither ID nor Status passed, first status of query is set on the add.	<ul style="list-style-type: none"><li>Numeric (if passed)</li></ul>	<ul style="list-style-type: none"><li>If passed, matches a status from that type of Query.</li></ul>
<i>querystatusname</i>	Optional, status name of query as part of add. If neither ID nor Status passed, first status of query is set on the add.		<ul style="list-style-type: none"><li>If passed, matches a status name from that type of Query.</li></ul>
<i>edit_query_id</i>	The ID in the study of the query	<ul style="list-style-type: none"><li>Required</li><li>Numeric</li></ul>	<ul style="list-style-type: none"><li>Must match a query on the subject</li></ul>
<i>edit_query_deletedvalue</i>	Optional – pass true, false for deleting or restoring the query	<ul style="list-style-type: none"><li>If passed, must be <b>true</b> or <b>false</b></li></ul>	
<i>edit_query_subject</i>	Optional, the subject line of the query – an update to the existing subject line	<ul style="list-style-type: none"><li>If passed, max 250 characters</li></ul>	





## 3.9 EDIT\_QUERY

### Field Specifics (continued)

Field	Description / Notes	Error Checking at File XML Parsing	Error Checking After XML Parse
<i>edit_query_comments</i>	The query comments as part of the update	<ul style="list-style-type: none"><li>• Required</li><li>• Max 3700 characters</li></ul>	



## 3.10 ADD\_VISIT

### Purpose

Used to add a visit for a subject.



### *NOTES:*

- ◆ *The subject must be both non-deleted and not in a Subject Status that is 'Data Read Only'*
- ◆ *The visit must be available to add: If the visit is repeating, the current visit count must not have met the maximum repeats value. If the visit is not repeating and the visit is already present, the ADD\_VISIT import will not cause a change.*

### Sample File

```
<ecos-dataprocessitems>
  <item type="ADD_VISIT">
    <subjectid></subjectid>
    <subjectidentifier>102004</subjectidentifier>
    <visitid>160</visitid>
  </item>
</ecos-dataprocessitems>
```

### Field Specifics

Field	Description / Notes	Error Checking at File XML Parsing	Error Checking After XML Parse
<i>subjectid</i>	The internal subject ID of the subject.	<ul style="list-style-type: none"><li>• Numeric (if passed)</li><li>• One of ID or Identifier Required</li></ul>	<ul style="list-style-type: none"><li>• <b>NOTE:</b> Subject MUST be non-deleted and in a Subject Status that is not 'Data Read Only'</li></ul>
<i>subjectidentifier</i>	The Subject Number/ Identifier of the added subject	<ul style="list-style-type: none"><li>• Numeric (if passed)</li><li>• One of ID or Identifier Required</li></ul>	<ul style="list-style-type: none"><li>• If passed, must match existing subject number</li></ul>



## 3.10 ADD\_VISIT

### Field Specifics (continued)

Field	Description / Notes	Error Checking at File XML Parsing	Error Checking After XML Parse
<i>visitid</i>	Visit ID	<ul style="list-style-type: none"><li>• Required</li><li>• Numeric</li></ul>	<ul style="list-style-type: none"><li>• Matches a Visit ID from the subject's Visit Schedule Revision</li><li>• It does not need to be repeating but Add will be limited by the maximum number of visits</li></ul>



## 3.11 ADD\_PAGE\_DATA

### **Purpose**

Used to add a new page for a subject.



### *NOTES:*

- ◆ *The subject must be both non-deleted and not in a Subject Status that is 'Data Read Only'*
- ◆ *For a repeating page add – controlidrepeatingcheck is STRONGLY suggested. See the table of fields for notes on this field.*

### **Sample File**

```
<myedc-dataprocessitems>
  <item type="ADD_PAGE_DATA">
    <subjectid></subjectid>
    <subjectidentifier>102004</subjectidentifier>
    <visitid>10</visitid>
    <visitseq>0</visitseq>
    <pageid>140</pageid>
    <pageseq>0</pageseq>
    <add_data_addpage>>false</add_data_addpage>
    <round_or_pad_decimalparts>>false</round_or_pad_decimalparts>
    <controlidrepeatingcheck>1</ controlidrepeatingcheck>
    <controlidrepeatingcheck>2</ controlidrepeatingcheck>
    <datavalues>
      <control id="" tablecolumn="DEMO.DOB">
        <value>1973-04-23</value>
        <reason>A reason for DOB</reason>
      </control>
      <control id="" tablecolumn="DEMO.HT">
        <value>70</value>
        <reason>height reason</reason>
      </control>
    </datavalues>
  </item>
</myedc-dataprocessitems>
```

*(continued on next page)*



## 3.11 ADD\_PAGE\_DATA

```
<control id="" tablecolumn="DEMO.CBTEST">
  <value>X</value>
  <reason>checkbox reason</reason>
</control>
<control id="" tablecolumn="DEMO.GENDER">
  <value>1</value>
  <reason>gender reason</reason>
</control>
</datavalues>
</item>
</myedc-dataprocessitems>
```

### Field Specifics

Field	Description / Notes	Error Checking at File XML Parsing	Error Checking After XML Parse
<i>subjectid</i>	The internal subject ID of the subject.	<ul style="list-style-type: none"><li>Numeric (if passed)</li><li>One of ID or Identifier Required</li></ul>	<ul style="list-style-type: none"><li><b>NOTE:</b> Subject MUST be non-deleted and in a Subject Status that is not 'Data Read Only', for this type of update.</li></ul>
<i>subjectidentifier</i>	The Subject Number/ Identifier of the added subject	<ul style="list-style-type: none"><li>Numeric (if passed)</li><li>One of ID or Identifier Required</li></ul>	<ul style="list-style-type: none"><li>If passed, must match existing subject number</li></ul>
<i>visitid</i>	Visit ID	<ul style="list-style-type: none"><li>Numeric</li><li>Required</li></ul>	<ul style="list-style-type: none"><li>Matches an ID from the subject's current schedule of pages</li></ul>
<i>visitseq</i>	Visit Sequence	<ul style="list-style-type: none"><li>Numeric</li><li>Required</li></ul>	<ul style="list-style-type: none"><li>Matches a sequence from the subject's current schedule of pages</li><li>USE_LAST_VISIT_SEQUENCE (see 3.14 Details about USE_LAST attributes)</li></ul>



## 3.11 ADD\_PAGE\_DATA

### Field Specifics (continued)

Field	Description / Notes	Error Checking at File XML Parsing	Error Checking After XML Parse
<i>pageid</i>	Page ID	<ul style="list-style-type: none"><li>Numeric</li><li>Required</li></ul>	<ul style="list-style-type: none"><li>Matches an ID from the subject's current schedule of pages</li></ul>
<i>pageseq</i>	Page Sequence – OPTIONAL - depends of type of data add	<ul style="list-style-type: none"><li>If passed, Numeric</li></ul>	<ul style="list-style-type: none"><li>If passed, matches a sequence from the subject's current schedule of pages, where NO data is yet present. If data exists at that location, the processing will fail, and UPDATE_PAGE_DATA file type should be used.</li><li>USE_LAST_PAGE_SEQUENCE (see 3.14 Details about USE_LAST attributes)</li></ul>
<i>add_data_addpage</i>	Whether the data adds expect to add a repeating page first.	<ul style="list-style-type: none"><li>Required</li><li>Must be true or false</li></ul>	<ul style="list-style-type: none"><li>If true, then <i>pageseq</i> must be passed as true and the spot in the visit schedule for the subject must be repeating, and not have violated any max repeats rules. <b>NOTE:</b> For Max Repeats = -1 – File Import adds ARE allowed – the -1 turns off ability in EDC to add pages, but pages may be added through Import Module.</li><li>If false, then <i>pageseq</i> must be passed, with that being an existing page with no data on the page. If data exists on that page, then the type UPDATE_PAGE_DATA must be used instead of ADD_PAGE_DATA</li></ul>

(continued on next page)



## 3.11 ADD\_PAGE\_DATA

### Field Specifics (continued)

Field	Description / Notes	Error Checking at File XML Parsing	Error Checking After XML Parse
<i>round_or_pad_decimalparts</i>	How data values should be treated when dealing with page controls of type Numeric.	<ul style="list-style-type: none"><li>• Required</li><li>• Must be true or false</li></ul>	<ul style="list-style-type: none"><li>• When false – the values in the datavalues area must directly match the After Decimal formatting, i.e. After Decimal = 0 -&gt; no decimal usage, and After Decimal = X means X numbers after the decimal</li><li>• When true, the values for decimals are padded or rounded per the After Decimal settings. Example, suppose a control has After Decimal formatting = 2.<ul style="list-style-type: none"><li>• File 3.456 -&gt; EDC <b>3.46</b></li><li>• File 3.4 -&gt; EDC <b>3.40</b></li></ul></li><li>• Regardless of this setting the Before Decimal formatting for a Numeric field is checked to not be more than the allowed places.</li></ul>

(continued on next page)



## 3.11 ADD\_PAGE\_DATA

### Field Specifics (continued)

Field	Description / Notes	Error Checking at File XML Parsing	Error Checking After XML Parse
<b><i>controlidrepeat-check</i></b>	Optional – although <b>STRONGLY SUGGESTED</b> . This control ID is used to ensure the subject does not already have a repeating page with that same value at that control slot. This is recommended to prevent duplicate adds by runaway file deliveries.	<ul style="list-style-type: none"><li>Numeric (if passed)</li></ul>	<ul style="list-style-type: none"><li>If passed, matches a control id from the page design at that visit schedule location.</li><li>Multiple can be added to form a multi-part uniqueness check</li></ul>

(continued on next page)





## 3.11 ADD\_PAGE\_DATA

### Field Specifics (continued)

Field	Description / Notes	Error Checking at File XML Parsing	Error Checking After XML Parse
<i><b>datavalues / control id / control table.column / value / reason</b></i>	List of data values/reasons. System Queries <b>WILL</b> execute after the add of data to a page. Not all controls from the page design are required, those not passed simply result in empty values for the page data. For example, a repeating page with ND (Not Done) checked can have a datavalues section of just the one control = 'X', without needing the other controls.	<ul style="list-style-type: none"><li>• If passed, control's id attribute must be numeric</li><li>• If passed, control's tablecolumn must contain a period (.)</li><li>• One of <i><b>id</b></i> or <i><b>tablecolumn</b></i> must be passed for the control element</li><li>• Reason not required, and can be left out of the XML</li></ul>	<ul style="list-style-type: none"><li>• Must have at least one data value for the add action.</li><li>• Each value is checked against the page design at the subject's visit schedule location.</li><li>• Multi / Many Select – must be formatted as value1^value2.. ^ delimiting</li><li>• Date format = YYYY-MM-DD</li><li>• Time format = HH:MI – 24 hour clock</li><li>• Not Done / Check Box – must be X or empty</li><li>• Codelist type controls (Dropdown, Radiolist, Multi Select, Many Select) must be valid codes from the codelist</li><li>• Text Field have Max Length enforced</li><li>• Comments have 3700 max length enforced</li><li>• Numeric has Before Decimal value enforced, with the <i><b>round_or_pad_decimalparts</b></i> value dictating how After Decimal format is handled.</li></ul>



## 3.12 UPDATE\_PAGE\_DATA

### Purpose

Used to update data on an existing page for a subject.



### *NOTES:*

- ◆ *The subject must be both non-deleted and not in a Subject Status that is 'Data Read Only'*
- ◆ *The spot in the subject's visit schedule MUST already have data residing. If the page spot exists, but no data is yet added, the action will abort. (ADD\_PAGE\_DATA should be used)*
- ◆ *For a repeating page add – controlidrepeatingcheck is STRONGLY suggested. See the table of fields for notes on this field.*

### Sample File

```
<ecos-dataprocessitems>
```

```
  <item type="UPDATE_PAGE_DATA">
    <subjectidentifier>102004</subjectidentifier>
    <visitid>100</visitid>
    <visitseq>0</visitseq>
    <pageid>20</pageid>
    <pageseq>1</pageseq>
    <round_or_pad_decimalparts>true</round_or_pad_decimalparts>
    <datavalues>
      <control id="" tablecolumn="CONMED.GN">
        <value>The drug name</value>
        <reason>asdff</reason>
      </control>
      <control id="" tablecolumn="CONMED.DOSE">
        <value>444</value>
        <reason>height reason</reason>
      </control>
      <control id="" tablecolumn="CONMED.FREQ">
        <value>3</value>
```

*(continued on next page)*



## 3.12 UPDATE\_PAGE\_DATA

```
<reason>a reason</reason>
</control>
<control id="" tablecolumn="CONMED.INDIC">
  <value>3</value>
  <reason>my reason</reason>
</control>
</datavalues>
</item>
</ecos-dataprocessitems>
```

### Field Specifics

Field	Description / Notes	Error Checking at File XML Parsing	Error Checking After XML Parse
<i>subjectid</i>	The internal subject ID of the subject.	<ul style="list-style-type: none"><li>Numeric (if passed)</li><li>One of ID or Identifier</li><li>Required</li></ul>	<ul style="list-style-type: none"><li><b>NOTE:</b> Subject MUST be non-deleted and in a Subject Status that is not 'Data Read Only', for this type of update.</li></ul>
<i>subjectidentifier</i>	The Subject Number/Identifier of the added subject	<ul style="list-style-type: none"><li>Numeric (if passed)</li><li>One of ID or Identifier</li><li>Required</li></ul>	<ul style="list-style-type: none"><li>If passed, must match existing subject number</li></ul>
<i>visitid</i>	Visit ID	<ul style="list-style-type: none"><li>Numeric</li><li>Required</li></ul>	<ul style="list-style-type: none"><li>Matches an ID from the subject's current schedule of pages</li></ul>
<i>visitseq</i>	Visit Sequence	<ul style="list-style-type: none"><li>Numeric</li><li>Required</li></ul>	<ul style="list-style-type: none"><li>Matches a sequence from the subject's current schedule of pages</li><li>USE_LAST_VISIT_SEQUENCE (see 3.14 Details about USE_LAST attributes)</li></ul>

(continued on next page)



## 3.12 UPDATE\_PAGE\_DATA

### Field Specifics (continued)

Field	Description / Notes	Error Checking at File XML Parsing	Error Checking After XML Parse
<i>pageid</i>	Page ID	<ul style="list-style-type: none"><li>Numeric</li><li>Required</li></ul>	<ul style="list-style-type: none"><li>Matches an ID from the subject's current schedule of pages</li></ul>
<i>pageseq</i>	Page Sequence	<ul style="list-style-type: none"><li>Numeric</li><li>Required</li></ul>	<ul style="list-style-type: none"><li>Matches a sequence from the subject's current schedule of pages</li><li>USE_LAST_PAGE_SEQUENCE (see 3.14 Details about USE_LAST attributes)</li></ul>
<i>round_or_pad_decimalparts</i>	How data values should be treated when dealing with page controls of type Numeric.	<ul style="list-style-type: none"><li>Required</li><li>Must be true or false</li></ul>	<ul style="list-style-type: none"><li>When false – the values in the datavalues area must directly match the After Decimal formatting, i.e. After Decimal = 0 -&gt; no decimal usage, and After Decimal = X means X numbers after the decimal</li><li>When true, the values for decimals are padded or rounded per the After Decimal settings. For Example, suppose a control has After Decimal formatting = 2.<ul style="list-style-type: none"><li>File 3.456 -&gt; EDC <b>3.46</b></li><li>File 3.4 -&gt; EDC <b>3.40</b></li></ul></li><li>Regardless of this setting the Before Decimal formatting for a Numeric field is checked to not be more than the allowed places.</li></ul>

(continued on next page)



## 3.12 UPDATE\_PAGE\_DATA

### Field Specifics (continued)

Field	Description / Notes	Error Checking at File XML Parsing	Error Checking After XML Parse
<b><i>controlidrepeat-check</i></b>	Optional – although <b>STRONGLY SUGGESTED</b> . This control ID is used to ensure the subject does not already have a repeating page with that same value at that control slot. This is recommended to prevent duplicate adds by runaway file deliveries.	<ul style="list-style-type: none"><li>Numeric (if passed)</li></ul>	<ul style="list-style-type: none"><li>If passed, matches a control id from the page design at that visit schedule location.</li><li>Multiple can be added to form a multi-part uniqueness check</li></ul>

(continued on next page)



## 3.12 UPDATE\_PAGE\_DATA

### Field Specifics (continued)

Field	Description / Notes	Error Checking at File XML Parsing	Error Checking After XML Parse
<i><b>datavalues / control id / control table.column / value / reason</b></i>	List of data values/reasons. System Queries <b>WILL</b> execute after the add of data to a page. Not all controls from the page design are required, those not passed simply result in empty values for the page data. For example, a repeating page with ND (Not Done) checked can have a datavalues section of just the one control = 'X', without needing the other controls.	<ul style="list-style-type: none"><li>• If passed, control's id attribute must be numeric</li><li>• If passed, control's tablecolumn must contain a period (.)</li><li>• One of <i><b>id</b></i> or <i><b>tablecolumn</b></i> must be passed for the control element</li><li>• Reason not required, and can be left out of the XML</li></ul>	<ul style="list-style-type: none"><li>• Must have at least one data value for the add action.</li><li>• Each value is checked against the page design at the subject's visit schedule location.</li><li>• Multi / Many Select – must be formatted as value1^value2.. ^ delimiting</li><li>• Date format = YYYY-MM-DD</li><li>• Time format = HH:MI – 24 hour clock</li><li>• Not Done / Check Box – must be X or empty</li><li>• Codelist type controls (Dropdown, Radiolist, Multi Select, Many Select) must be valid codes from the codelist</li><li>• Text Field have Max Length enforced</li><li>• Comments have 3700 max length enforced</li><li>• Numeric has Before Decimal value enforced, with the <i><b>round_or_pad_decimalparts</b></i> value dictating how After Decimal format is handled.</li></ul>



## 3.13 ADD\_OR\_UPDATE\_PAGE\_DATA

### **Purpose**

Used to update data on an existing page for a subject or create a new page with the data if one does not already exist.



### *NOTES:*

- ◆ *The subject must be both non-deleted and not in a Subject Status that is 'Data Read Only'*
- ◆ *For a repeating page add – controlidrepeatingcheck is STRONGLY suggested. See the table of fields for notes on this field.*
- ◆ *Adding or updating on a specific page requires that the visitseq and pageseq be specified.*
- ◆ *If updating and visitseq or pageseq is omitted, then controlidrepeatingcheck is used to check the field on the repeating visits/pages to find the page to update. If no match is found, a new visit or page will be created.*

### **Sample Files**

- ◆ Add or update data on an existing page (all keys known) – include visitseq and pageseq

`<ecos-dataprocessitems>`

```
<item type="ADD_OR_UPDATE_PAGE_DATA">
  <subjectidentifier>101001</subjectidentifier>
  <visitid>10</visitid>
  <visitseq>0</visitseq>
  <pageid>60</pageid>
  <pageseq>0</pageseq>
  <round_or_pad_decimalparts>>false</round_or_pad_decimalparts>
  <datavalues>
    <control id="" tablecolumn="PE.DT">
      <value>2012-10-06</value>
      <reason>A reason for date</reason>
    </control>
    <control id="" tablecolumn="PE.HEENT2">
      <value>1</value>
```

*(continued on next page)*



## 3.13 ADD\_OR\_UPDATE\_PAGE\_DATA

### Sample Files (continued)

- ◆ Add or update data on an existing page (all keys known) – include visitseq and pageseq (Continued)

```
<reason>A reason for HEENT2</reason>
</control>
</datavalues>
</item>
</ecos-dataprocesitems>
```

- ◆ Add a new page – do not specify any controlidrepeatingchecks

```
<ecos-dataprocesitems>
  <item type="ADD_OR_UPDATE_PAGE_DATA">
    <subjectidentifier>101001</subjectidentifier>
    <visitid>110</visitid>
    <visitseq>0</visitseq>
    <pageid>20</pageid>
    <round_or_pad_decimalparts>>false</round_or_pad_decimalparts>
    <datavalues>
      <control id="" tablecolumn="AE.SER">
        <value>1</value>
        <reason>A reason for AE Serious</reason>
      </control>
      <control id="" tablecolumn="AE.EVENT">
        <value>HEADACHE</value>
        <reason>A reason for AE Event</reason>
      </control>
    </datavalues>
  </item>
</ecos-dataprocesitems>
```

*(continued on next page)*





## 3.13 ADD\_OR\_UPDATE\_PAGE\_DATA

### Sample Files (continued)

- ◆ Update data on an unknown page – exclude visitseq (repeating visits) or pageseq (repeating page), specify the data that identifies the page in the controls tags associated with the ids specified in controlidrepeatingcheck. If no controlidrepeatingchecks are provided or no match exists, then a new visit/page will be created.

<ecos-dataprocessitems>

<item type="ADD\_OR\_UPDATE\_PAGE\_DATA">

<subjectidentifier>000002</subjectidentifier>

<visitid>150</visitid>

<visitseq>0</visitseq>

<pageid>20</pageid>

<round\_or\_pad\_decimalparts>>false</round\_or\_pad\_decimalparts>

<controlidrepeatingcheck>2</controlidrepeatingcheck>

<controlidrepeatingcheck>3</controlidrepeatingcheck>

<datavalues>

<control id="2" tablecolumn="INEX.NU">

<value>30</value>

<reason>A reason for Inclusion/exclusion Number</reason>

</control>

<control id="3" tablecolumn="INEX.CRDETAILS">

<value>This is a test.</value>

<reason>A reason for CR Details</reason>

</control>

</datavalues>

</item>

</ecos-dataprocessitems>

*(continued on next page)*



## 3.13 ADD\_OR\_UPDATE\_PAGE\_DATA

### Field Specifics

Field	Description / Notes	Error Checking at File XML Parsing	Error Checking After XML Parse
<i>subjectid</i>	The internal subject ID of the subject.	<ul style="list-style-type: none"><li>Numeric (if passed)</li><li>One of ID or Identifier Required</li></ul>	<ul style="list-style-type: none"><li><b>NOTE:</b> Subject MUST be non-deleted and in a Subject Status that is not 'Data Read Only', for this type of update.</li></ul>
<i>subjectidentifier</i>	The Subject Number/Identifier of the added subject	<ul style="list-style-type: none"><li>Numeric (if passed)</li><li>One of ID or Identifier Required</li></ul>	<ul style="list-style-type: none"><li>If passed, must match existing subject number</li></ul>
<i>visitid</i>	Visit ID	<ul style="list-style-type: none"><li>Numeric</li><li>Required</li></ul>	<ul style="list-style-type: none"><li>Matches a sequence from the subject's current schedule of pages</li><li>If blank, controlidrepeating-check will determine If an existing visit should be updated or a new visit should be created</li><li>USE_LAST_VISIT_SEQUENCE (see 3.14 Details about USE_LAST attributes)</li></ul>
<i>visitseq</i>	Visit Sequence – Optional if page sequence is provided and visit is repeating	<ul style="list-style-type: none"><li>Numeric</li><li>Required</li></ul>	<ul style="list-style-type: none"><li>Matches a sequence from the subject's current schedule of pages</li><li>If blank, controlidrepeating-check will determine If an existing visit should be updated or a new visit should be created</li></ul>
<i>pageid</i>	Page ID	<ul style="list-style-type: none"><li>Numeric</li><li>Required</li></ul>	<ul style="list-style-type: none"><li>Matches an ID from the subject's current schedule of pages</li></ul>



## 3.13 ADD\_OR\_UPDATE\_PAGE\_DATA

### Field Specifics (continued)

Field	Description / Notes	Error Checking at File XML Parsing	Error Checking After XML Parse
<i>pageseq</i>	Page Sequence	<ul style="list-style-type: none"><li>Numeric</li><li>Required</li></ul>	<ul style="list-style-type: none"><li>Matches a sequence from the subject's current schedule of pages</li><li>If blank, controlidrepeating-check will determine If an existing page should be updated or a new page should be created.</li><li>USE_LAST_PAGE_SEQUENCE (see 3.14 Details about USE_LAST attributes)</li></ul>
<i>round_or_pad_decimalparts</i>	How data values should be treated when dealing with page controls of type Numeric.	<ul style="list-style-type: none"><li>Required</li><li>Must be true or false</li></ul>	<ul style="list-style-type: none"><li>When false – the values in the datavalues area must directly match the After Decimal formatting, i.e. After Decimal = 0 -&gt; no decimal usage, and After Decimal = X means X numbers after the decimal</li><li>When true, the values for decimals are padded or rounded per the After Decimal settings. Example, suppose a control has After Decimal formatting = 2. File 3.456 -&gt; EDC <b>3.46</b> File 3.4 -&gt; EDC <b>3.40</b></li><li>Regardless of this setting the Before Decimal formatting for a Numeric field is checked to not be more than the allowed places.</li></ul>

(continued on next page)



### 3.13 ADD\_OR\_UPDATE\_PAGE\_DATA

#### Field Specifics

Field	Description / Notes	Error Checking at File XML Parsing	Error Checking After XML Parse
<i>controlidrepeatingcheck</i>	Optional for data add, page add, and update to a known page – although <b>STRONGLY SUGGESTED</b> . For a page add, this control ID is used to ensure the subject does not already have a repeating page with that same value at that control slot. This is recommended to prevent duplicate adds by runaway file deliveries. For an update to an unknown page, the control IDs specified are used identify the page to be updated.	<ul style="list-style-type: none"><li>Numeric (if passed)</li></ul>	<ul style="list-style-type: none"><li>If passed, matches a control id from the page design at that visit schedule location.</li><li>Multiple can be added to form a multi-part uniqueness check</li><li>A datavalue (see below) for each controlidrepeating-check must be provided</li></ul>

(continued on next page)



### 3.13 ADD\_OR\_UPDATE\_PAGE\_DATA

#### Field Specifics (continued)

Field	Description / Notes	Error Checking at File XML Parsing	Error Checking After XML Parse
<i>datavalues / control id / control table.column / value / reason</i>	List of data values / reasons. System Queries <b>WILL</b> execute after the add of data to a page. Not all controls from the page design are required, those not passed simply result in empty values for the page data. For example, a repeating page with ND (Not Done) checked can have a datavalues section of just the one control = 'X', without needing the other controls.	<ul style="list-style-type: none"> <li>• If passed, control's id attribute must be numeric</li> <li>• If passed, control's table.column must contain a period (.)</li> <li>• One of <i>id</i> or <i>tablecolumn</i> must be passed for the control element</li> <li>• Reason not required, and can be left out of the XML</li> </ul>	<ul style="list-style-type: none"> <li>• Must have at least one data value for the add action.</li> <li>• Each value is checked against the page design at the subject's visit schedule location.</li> <li>• Multi / Many Select – must be formatted as value1^value2.. ^delimiting</li> <li>• Date format = YYYY-MM-DD</li> <li>• Time format = HH:MI – 24 hour clock</li> <li>• Not Done / Check Box – must be X or empty</li> <li>• Codelist type controls (Dropdown, Radiolist, Multi Select, Many Select) must be valid codes from the codelist</li> <li>• Text Field have Max Length enforced</li> <li>• Comments have 3700 max length enforced</li> <li>• Numeric has Before Decimal value enforced, with the <i>round_or_pad_decimalparts</i> value dictating how After Decimal format is handled.</li> </ul>



## 3.14 Details about USE\_LAST attributes

### USE\_LAST\_VISIT\_SEQUENCE

For each subject/visit reference in an import file, the import records the visit sequence while processing the file. If USE\_LAST\_VISIT\_SEQUENCE is found in a later block of XML within the import file, replace USE\_LAST\_VISIT\_SEQUENCE with the last visit sequence used for that subject/visit.

Scenario:

A repeating visit exists in the study.

Page 1 on the visit contains the unique key(s) for the visit.

Page 2 on the visit does not contain the unique key(s) for the visit.

Page 1 can be added/updated using ADD\_OR\_UPDATE\_SUBJECT\_DATA by leaving the visit sequence blank and specifying the correct unique keys.

Page 2 cannot be added/updated because it does not contain the unique keys, so there is no way to look up an existing page.

How this change will allow page 2 to be updated:

A block of XML will be put in the import document for that subject.

This block will provide the visit id, page id, and page seq for Page 1 (not visit sequence).

This block will also contain all of the unique keys required to look up the visit sequence but does not need to provide data values for any other field. This essentially turns this block in to a look up function for a visit sequence.

A second block of XML will be included for page 2. It will specify

visit id (same as page 1)

visit seq - USE\_LAST\_VISIT\_SEQUENCE

page id (page 2 page id)

page seq (page 2 page seq, could also be blank to allow lookup)



#### NOTES:

- ◆ *Can only be used to lookup visit sequences for items already processed (sequentially) in the same file*
- ◆ *As each item in the file is processed, the visit sequence will be stored for each subject id and visit id (including ADD\_VISIT)*
- ◆ *When USE\_LAST\_VISIT\_SEQUENCE is specified for a visitseq, the import will find the most recent visit sequence used for that subject/visit combination. If found, that will be used as the visitseq. If not found, an error will occur.*



## 3.14 Details about USE\_LAST attributes

### USE\_LAST\_PAGE\_SEQUENCE

USE\_LAST\_PAGE\_SEQUENCE functions exactly the same as USE\_LAST\_VISIT\_SEQUENCE except that it works for page sequence.



#### NOTES:

- ◆ *Stores the last used page sequence for a combination of subject/visit/visitseq/pageid previously found in the file*
- ◆ *Can be used in conjunction with USE\_LAST\_VISIT\_SEQUENCE*
- ◆ *Primary purpose for USE\_LAST\_PAGE\_SEQUENCE is adding queries. Most likely this would be used for a complete study migrations (i.e. changing platform / rescue study)*



## 3 Practical Exercise

### DAISY

### Using Data Imports in DAISY



**IMPORTANT:** You may need the DAISY sample import files from the Additional Materials to complete this exercise. Additional Materials are available in the Training box on the landing page.

We will begin by adding a subject.

1. First, you will need to create the XML file or update the one provided in the Additional Materials.

- ◆ FILE NAME: daisy\_samples\_add\_subject\_002101.xml

FILE TEXT:

```
<ecos-dataprocessitems>
<item studyid="Use Your DAISY Study ID" type="ADD_SUBJECT">
  <subjectidentifier>002101</subjectidentifier>
  <subjectidentifier2>ABC</subjectidentifier2>
  <subjectidentifier3></subjectidentifier3>
  <add_revisionnumber>1</add_revisionnumber>
  <sitenum>001</sitenum>
  <statusid />
  <statusname />
</item>
</ecos-dataprocessitems>
```

2. In the study EDC, click the Imports/API tab.
3. Click the Upload button.
4. Click Browse and find the file from step 1.
5. In the Comments, enter the text 'DAISY Training'.
6. Click the Upload button.





### 3 Practical Exercise

#### DAISY

You are returned to the main Data Imports screen and will see your file on the processed table. It should be in status New. You will not receive an e-mail when it has finished processing unless there is an error.



*NOTES: If you receive alert emails when a subject is added to the study (Design Attributes Optional -> Add/Edit Subject Email Alert Mail List), you will receive an email about the add.*

The upload should be a success. If you refresh your EDC screen, you will see the status updated to Completed (in green) and see the log file.

Navigate to the Patient List. Click on the Patient ID to open the Patient View. Click on Patient Information. Note the history for the patient shows the addition by import.

Now we will add data to the subject we just added.

7. First, you will need to create another XML file or update the one provided in the Additional Materials.

- ◆ FILE NAME: daisy\_samples\_add\_page\_data\_002101.xml

#### FILE TEXT

```
<ecos-dataprocessitems>
```

```
  <item type="ADD_PAGE_DATA" studyid="Use Your DAISY  
    Study ID">
```

```
    <subjectid></subjectid>
```

```
    <subjectidentifier>002101</subjectidentifier>
```

```
    <visitid>10</visitid>
```

```
    <visitseq>0</visitseq>
```

```
    <pageid>10</pageid>
```

```
    <pageseq>0</pageseq>
```

```
  <add_data_addpage>>false</add_data_addpage>
```

*(continued on next page)*



### 3 Practical Exercise

DAISY

FILE TEXT CONTINUED

```
<round_or_pad_decimalparts>>false</round_or_pad_decimalparts>
<controlidrepeatingcheck>1</controlidrepeatingcheck>
<datavalues>
    <control id="1" tablecolumn="IC.ICYN">
        <value>1</value>
        <reason>Training data import</reason>
    </control>
    <control id="2" tablecolumn="IC.ICDT">
        <value>2012-03-01</value>
        <reason>Training data import</reason>
    </control>
    <control id="3" tablecolumn="IE.IEYN">
        <value>1</value>
        <reason>Training data import</reason>
    </control>
    <control id="4" tablecolumn="IE.IEYPE">
        <value></value>
        <reason>Training data import</reason>
    </control>
    <control id="5" tablecolumn="IE.IEFAIL">
        <value></value>
        <reason>Training data import</reason>
    </control>
</datavalues>
</item>
</ecos-dataprocessitems>
```

**3****Practical Exercise****DAISY**

8. In the study EDC, click the Imports/API tab.
9. Click the Upload button.
10. Click Browse and find the file from step 1.
11. In the Comments, enter the text 'DAISY Training'.
12. Click the Upload button.

You are returned to the main Data Imports screen and will see your file on the processed table. It should be in status New. You will only receive an e-mail when it has finished processing if there are errors.

The upload should be a success. If you refresh your EDC screen, you will see the status updated to Completed (in green) and see the log file.

Navigate to the Patient List. Click on the Patient ID for 002101 to open the Patient View. Note the Consent/Criteria page shows the Entered icon. Click on the icon to access the page. The data we imported is present. Click on Full Page Audit Trail (middle of the right panel). You can see the data was added by import and also the comment we had for the "reason" in the import.



3

## Self Assessment || Tips and Tricks



1. If you attempt to import data to a page using `UPDATE_PAGE_DATA` but the page does not exist yet, the import process will skip over that part of the file and process any other functions.  
☐ True ☐ False
2. If you are importing data to a static page (non-repeating), the page sequence will always be zero (0).  
☐ True ☐ False
3. You can use more than one `controlidrepeatingcheck` to help identify unique pages when importing data to a repeating page using `ADD_OR_UPDATE_PAGE_DATA`.  
☐ True ☐ False



### Tips and Tricks

- ◆ The import file must be in the XML format outlined in this manual, but the actual file extension may be .TXT, .XML, or another format that presents text.
- ◆ The `controlidrepeatingcheck` elements help the system identify whether the page already exists or not.
  - ◆ When using `ADD_OR_UPDATE_PAGE_DATA` - If all values match, the identified visit/page will be used. If all values match on multiple pages, an error will be provided. If none match, a new visit/page will be created.
  - ◆ When using `ADD_PAGE_DATA` - If any match, an error will be given.
- ◆ The Page Sequence for a static/non-repeating page is always zero (0). The Page Sequence for a repeating page starts at one (1) and increments with each record added.
- ◆ The Visit Sequence for a static/non-repeating visit is always zero (0). The Visit Sequence for a repeating visit starts at one (1) and increments with each visit added.
- ◆ Page ID can be found on the Visit Details.
- ◆ Visit ID can be found on the Visit Schedule: Order.

Answers:

1. False   2. True   3. False



3

## Self Assessment || Tips and Tricks



### Tips and Tricks (continued)

- ◆ When defining the location of a page, Visit ID and Page ID are required. Page Sequence or Visit Sequence may be left blank under certain circumstances.
  - ◇ When adding or updating page data in a repeating visit, if the visit sequence is unknown or the visit is not yet created, the visit sequence should be left blank. (Visit ID, Page ID, and Page Seq required). You can include one or more controlidrepeatingcheck elements to identify unique records.
  - ◇ When adding or updating page data in a repeating page, if the page sequence is unknown or the visit is not yet created, the visit sequence should be left blank. (Visit ID, Page ID, and Visit Seq required). You can include one or more controlidrepeatingcheck elements to identify unique records.
  - ◇ When all parts of the page key (Visit ID, Page ID, Visit Seq, Page Seq) are known and included, controlidrepeatingcheck elements are ignored.
- ◆ An optional element <skip\_if\_exists> can be used to skip subjects that already exist when using the ADD\_SUBJECT function and not cause the entire import to fail. The allowed values are empty, true, and false.
  - ◇ True means the system will skip if the subject exists.
  - ◇ False means it will not. The default, if not provided, is False.
- ◆ If a CRF Revision is not provided in the ADD\_SUBJECT function, the system will attempt to identify the default revision.
  - ◇ If the site for the subject only has one revision with CAN ADD permission, the system will choose that revision to add the subject.
  - ◇ If the site has multiple revisions with CAN ADD, an error will be generated and the subject will not be created.

**4**

## API Services

**Overview**

Application Programming Interface (API) Services are used to interface between systems -- allowing your servers to connect directly to your study in eClinical OS and transfer or retrieve data.

**Setup****Data Imports****API Services**

API can be used interactively in the system to query details about the study and it's data. It can also be set up as a method to automatically import data. Basic details will be covered in this section of the manual. For more in-depth information, please contact your Merge Account Manager or Technical Support.



### 4.1 Interactive Mode

Home Patient List Reports Site Documents Change Requests Imports/API Sites/

Dates: Last 7 Days Status: All  
Column: [Dropdown] [Dropdown]

Files Processed : 3 record(s)

(Interactive API Viewer)

Processing ID	File	Status	Last Mod Date
46	samples_add_subjects_2012-05-04 - Copy.xml	FAILED	14-MAY-12 14:47:58 EDT

Users with both Data Import Admin and API Admin checked for their study role will have a link on the File Table.

Patient List Reports Site Documents Change Requests API

Click for Interactive API Viewer (opens in new tab)

Users with API Admin only checked for their study role will have a link on the API tab for accessing.

eClinical OS : API Services (Interactive Mode)

Interactive API Login Screen

Login

User ID: [Input] \*

Password: [Input] \*

Study ID: 1122

Login

Raw Server Return Value:

None

Notes / Parameter Usage:

Type	Notes	Parameter 1	Parameter 2	Parameter 3
data_mobile_user_pref	Mobile Notification information	-	-	-
data_sitelist	Site information	<ul style="list-style-type: none"><li>Status of site(s) returned</li><li>Use only values of all, active or inactive</li><li>Default is all if not indicated</li></ul>	-	-
data_subjectlist	Subject information	<ul style="list-style-type: none"><li>Whether to include deleted subjects in return</li><li>Use only values of yes or no</li><li>Default is yes if not indicated</li></ul>	<ul style="list-style-type: none"><li>Return subjects from a specific site</li><li>Use valid Site #</li></ul>	<ul style="list-style-type: none"><li>Return just a specific subject</li><li>Use valid subject identifier</li></ul>
data_userlist	Users in study	<ul style="list-style-type: none"><li>Filter on return</li><li>Use only values of all, all-nonsubject, all-subject, pending, notpending, active, inactive, noedconnects, or atleastneedconnect</li><li>Default is all if not indicated</li></ul>	-	-
data_userhistory	User access history	-	-	-
data_userlogins	User logins to study	-	-	-



## 4.1 Interactive Mode

Interactive mode opens in a new tab or window of your browser and required a re-login using your account credentials. This login follows the same rules for a regular eClinical OS login, including a limit of 5 failed attempts.

Each action yields a 'Raw Server Return Value'. This shows what the server would return for a true web service call (after login) for the action performed (login, logout, fetch of information, etc).

Successful logins / information requests / pushes are met with status='ok' returns. An example of the return on a good login and logout:

login:

```
<reply status="ok" type="login"></reply>
```

and logout:

```
<reply status="ok" type="logout"></reply>
```

Any error is met with an XML reply with status attribute = 'error'. Details of the error are contained in the reply (example of a bad login attempt):

```
<reply status="error" errors="ERROR: Password incorrect for this user. You have 4 more attempts until your account is locked out."></reply>
```

Interactive mode cannot be used actively for two different projects at the same time. An attempt on the 2nd project to pull up this mode will be met with an auto-logout.

The page contains a table that summarizes the types of information that can be fetched, complete with parameters that are applicable for each type. The information is also included in the next section.





## 4.2 Information Returns

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>data_sitelist</i>	Site information	<ul style="list-style-type: none"><li>• Status of site(s) returned</li><li>• Use only values of <b>all</b>, <b>active</b> or <b>inactive</b></li><li>• Default is <b>all</b> if not indicated</li></ul>	-	-
<i>data_subjectlist</i>	Subject information	<ul style="list-style-type: none"><li>• Whether to include deleted subjects in return</li><li>• Use only values of <b>yes</b> or <b>no</b></li><li>• Default is <b>yes</b> if not indicated</li></ul>	<ul style="list-style-type: none"><li>• Return subjects from a specific site</li><li>• Use valid Site #</li></ul>	<ul style="list-style-type: none"><li>• Return just a specific subject</li><li>• Use valid subject identifier</li></ul>
<i>data_userlist</i>	Users in study	<ul style="list-style-type: none"><li>• Filter on return</li><li>• Use only values of <b>all</b>, <b>all-nonsubject</b>, <b>all-subject</b>, <b>pending</b>, <b>not-pending</b>, <b>active</b>, <b>inactive</b>, <b>noedcconnects</b>, or <b>atleastoneedcconnect</b></li><li>• Default is <b>all</b> if not indicated</li></ul>	-	-
<i>data_userhistory</i>	User access history	-	-	-
<i>data_userlogins</i>	User logins to study	-	-	-

(continued on next page)



## 4.2 Information Returns

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>data_querylist</i>	Queries in study	<ul style="list-style-type: none"><li>• Whether to include deleted subjects in return</li><li>• Use only values of <b>yes</b> or <b>no</b></li><li>• Default is <b>yes</b> if not indicated</li></ul>	<ul style="list-style-type: none"><li>• Filter on deleted query or page deleted</li><li>• Use only values of <b>all</b>, <b>not-pagedeleted</b>, <b>pagedeleted</b>, <b>notdeleted</b>, <b>deleted</b>, or <b>notdeleted-and-not-pagedeleted</b></li><li>• Default is <b>all</b> if not indicated</li></ul>	<ul style="list-style-type: none"><li>• Filter on status</li><li>• Use only values of <b>all</b>, <b>answered</b>, <b>notanswered</b>, <b>closed</b>, <b>notclosed</b>, <b>notanswered-or-notclosed</b>, or <b>answered-or-closed</b></li><li>• Default is <b>all</b> if not indicated</li></ul>
<i>data_pagelinksattachments</i>	Page Attachments, Page Links	<ul style="list-style-type: none"><li>• Whether to include deleted subjects in return</li><li>• Use only values of <b>yes</b> or <b>no</b></li><li>• Default is <b>yes</b> if not indicated</li></ul>	<ul style="list-style-type: none"><li>• Filter the return</li><li>• Use only values of <b>all</b>, <b>links</b>, or <b>attachments</b></li><li>• Default is <b>all</b> if not indicated</li></ul>	-
<i>data_pagestatus</i>	Status of all pages in study, including no data pages	<ul style="list-style-type: none"><li>• Whether to include deleted subjects in return</li><li>• Use only values of <b>yes</b> or <b>no</b></li><li>• Default is <b>yes</b> if not indicated</li></ul>	-	-

(continued on next page)



## 4.2 Information Returns

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>data_epro</i>	ePROs in study, completed or incomplete	<ul style="list-style-type: none"><li>• Whether to include deleted subjects in return</li><li>• Use only values of <b>yes</b> or <b>no</b></li><li>• Default is <b>yes</b> if not indicated</li></ul>	<ul style="list-style-type: none"><li>• Filter on finished / not finished</li><li>• Use only values of <b>all</b>, <b>finished</b>, or <b>notfinished</b></li><li>• Default is <b>all</b> if not indicated</li></ul>	-
<i>data_rand</i>	Randomization records in study. During live portion of study, blinded information shown per the design attributes settings for exports	-	-	-
<i>data_dispensebatches</i>	Dispense batches in study	-	-	-
<i>data_dispenseitems</i>	Dispense records in study. During live portion of study, blinded information shown per the design attributes settings for exports	-	-	-



## 4.2 Information Returns

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>data_dispenseshipments</i>	Shipments in study	-	-	-
<i>data_dispensesitesettings</i>	Site shipment settings in study	-	-	-
<i>data_datatable</i>	EDC data table. As with other data table export formats, NO deleted subjects or pages are included.	<ul style="list-style-type: none"><li>Valid table name (T) from page designs. Refer to Preview Data Exports for valid tables in the study.</li></ul>	-	-
<i>data_reports_view</i>	Report view, the schema of the XML depends on the report type. Run design_reports to gather report ID to pass to this function, and understand type of report from that design information fetch.	<ul style="list-style-type: none"><li>ID of report</li><li>Only valid ID from study reports is accepted, and the report must be active</li><li>User site rights and role rights are re-checked on fetch for valid access</li></ul>	-	-
<i>design_studyattributes</i>	Main study attributes	-	-	-
<i>design_designattributes</i>	All high level design attributes - required and optional	-	-	-



## 4.2 Information Returns

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>design_roles</i>	Role definitions	-	-	-
<i>design_subjectstatus</i>	Subject status definitions, jump permissions	-	-	-
<i>design_pagestatus</i>	Page status definitions, jump permissions	-	-	-
<i>design_querytypes</i>	Query type/ status definitions, jump permissions	-	-	-
<i>design_codelists</i>	<p>Codelist definitions in study, filter to only used, or view all.</p> <p><b>NOTE:</b> System level codelists for page statuses, subject statuses, randomization assignments etc. included always</p>	<ul style="list-style-type: none"><li>• Filter on return</li><li>• Use only values of <b>all</b> or <b>onlyinusebypage</b></li><li>• <b>onlyinusebypage</b> yields just codelists that are in use by some page design</li><li>• Default is <b>all</b> if not indicated</li></ul>	-	-

(continued on next page)



## 4.2 Information Returns

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>design</i> <i>_pagedefinitions</i>	Page definitions in study, filter to only used, or view all	<ul style="list-style-type: none"><li>• Filter on return</li><li>• Use only values of <b>all</b>, <b>onlyinvisitdef</b> or <b>onlyinvisitscheduledef</b></li><li>• <b>onlyinvisitdef</b> yields just pages that are used in some visit definition, even if the visit is not in a visit schedule</li><li>• <b>onlyinvisitscheduledef</b> yields just pages that are used in some visit schedule</li><li>• Default is <b>all</b> if not indicated</li></ul>	-	-
<i>design</i> <i>_visitdefinitions</i>	Visit definitions in study, filter to only used, or view all	<ul style="list-style-type: none"><li>• Filter on return</li><li>• Use only values of <b>all</b> or <b>onlyinvisitscheduledef</b></li><li>• <b>onlyinvisitscheduledef</b> yields just visits that are used in some visit schedule</li><li>• Default is <b>all</b> if not indicated</li></ul>	-	-
<i>design</i> <i>_visitschedules</i>	Visit schedule definitions in study, filter to only used, or view all	<ul style="list-style-type: none"><li>• Filter on return</li><li>• Use only values of <b>all</b> or <b>onlyinusebysubject</b></li><li>• <b>onlyinusebysubject</b> yields just visit schedules that are currently in use by <b>non-deleted</b> subjects</li><li>• Default is <b>all</b> if not indicated</li></ul>	-	-



## 4.2 Information Returns

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>design_revisions</i>	Revision definitions, includes basic definition, rules, permissions, and jumps	-	-	-
<i>design_visitschedulepermissions</i>	Visit schedule permissions, across all revisions	-	-	-
<i>design_visitschedulerrules</i>	Visit schedule rules, across all revisions	-	-	-
<i>design_systemqueries</i>	System query definitions in study	<ul style="list-style-type: none"><li>• Filter on return</li><li>• Use only values of <b>all</b>, <b>onlyinvisitdef</b> or <b>onlyinvisitscheduledef</b></li><li>• <b>onlyinvisitdef</b> yields just queries from pages that are used in some visit definition, even if the visit is not in a visit schedule</li><li>• <b>onlyinvisitscheduledef</b> yields just queries from pages that are used in some visit schedule</li><li>• Default is <b>all</b> if not indicated</li></ul>	-	-
<i>design_reports</i>	Report definitions	<ul style="list-style-type: none"><li>• Status of report(s) returned</li><li>• Use only values of <b>all</b>, <b>active</b> or <b>inactive</b></li><li>• Default is <b>all</b> if not indicated</li></ul>	-	-



## 4.2 Information Returns

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>design_systemmessages</i>	System messages in EDC	<ul style="list-style-type: none"><li>Status of message returned</li><li>Use only values of <b>all</b>, <b>active</b> or <b>inactive</b></li><li>Default is <b>all</b> if not indicated</li></ul>	-	-
<i>design_strata</i>	Stratification design information	-	-	-
<i>design_rand</i>	Randomization design information	-	-	-
<i>design_dispensetypes</i>	Dispense types design information	-	-	-
<i>design_dispensetreatments</i>	Dispense treatments design information	-	-	-
<i>general_study-list</i>	Studies currently logged in user has access to - general study access (i.e. general user), not with respect to any team.	<ul style="list-style-type: none"><li>Status of study account requests</li><li>Use only values of all, active, pending, or inactive</li><li>Default is all if not indicated</li></ul>		





## 4.2 Information Returns

After successful login, the user can fetch any of a number of pieces of information.

Each is available from the 'Information Type' drop down – with data\_\* representing data in the study, and design\_\* representing study design.

Parameter 1 , Parameter 2, and Parameter 3 fields are values sent to an API call, to filter the return in some way. The values (if at all) are dependent on the Information Type used, and the system will reject any bad parameter names with an error reply.

Choose Return:

Study ID:

1122 (Disconnect from Study)

Study Name:

STAR - Malok

Information Type:

\*

Parameter 1:


(usage depends on type)

Parameter 2:

(usage depends on type)

Parameter 3:

(usage depends on type)

 View



## 4.3 data\_sitelist

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>data_sitelist</i>	Site information	<ul style="list-style-type: none"><li>Status of site(s) returned</li><li>Use only values of <b>all</b>, <b>active</b> or <b>inactive</b></li><li>Default is <b>all</b> if not indicated</li></ul>	-	-

### Sample Return

```
<reply status="ok" type="data_sitelist">
  <sites>
    <site>
      <sitenum>101</sitenum>
      <siteid>512</siteid>
      <sitename>Site 101</sitename>
      <type>Site</type>
      <contact>Joe Primary Contact</contact>
      <email>eric.emerton@merge.com</email>
      <altemail>eric.emerton@etrial.com</altemail>
      <phone>123-456-7899</phone>
      <fax>No fax</fax>
      <active>t</active>
      <address>123 Main Street Cary, NC 27513</address>
      <country>USA</country>
      <pi>Dr. Smith</pi>
      <capall>10</capall>
      <caprand>5</caprand>
      <revisions>
        <revision id="1" canadd="t" canmoveto="f" />
      </revisions>
    </site>
    <site>
      <sitenum>102</sitenum>
      <siteid>514</siteid>
      <sitename>Site 102</sitename>
      <type>Site</type>
```

(continued on next page)



## 4.3 data\_sitelist

### Sample Return (continued)

```
<contact></contact>
<email></email>
<altemail></altemail>
<phone></phone>
<fax></fax>
<active>t</active>
<address>An address iwht double quote " and a single quote ' then return and
        END</address>
<country></country>
<pi></pi>
<capall></capall>
<caprand></caprand>
<revisions>
  <revision id="1" canadd="t" canmoveto="f" />
</revisions>
</site>
</sites>
</reply>
```

### Details

Field	Description / Notes
<i>sitenum</i>	Site # / Identifier
<i>siteid</i>	Internal ecos id (never changes)
<i>sitename</i>	Site Name
<i>type</i>	Type for the organization (Site, Sponsor, CRO, etc), from dropdown in EDC
<i>contact</i>	Primary Contact
<i>email</i>	Email
<i>phone</i>	Phone
<i>fax</i>	Fax
<i>active</i>	Active – t (true) or f (false)
<i>address</i>	Address



## 4.3 data\_sitelist

### Details (continued)

Field	Description / Notes
<i>country</i>	Country / Region
<i>pi</i>	Primary Investigator
<i>capall</i>	Overall cap (non deleted subjects)
<i>capprand</i>	Randomization cap (non deleted subjects)
<i>revisions</i>	Revision rights for the site – using t (true) or f (false) on the permissions ‘Can Add’ / ‘Can Move’



## 4.4 data\_subjectlist

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>data_subjectlist</i>	Subject information	<ul style="list-style-type: none"><li>Whether to include deleted subjects in return</li><li>Use only values of <b>yes</b> or <b>no</b></li><li>Default is <b>yes</b> if not indicated</li></ul>	<ul style="list-style-type: none"><li>Return subjects from a specific site</li><li>Use valid Site #</li></ul>	<ul style="list-style-type: none"><li>Return just a specific subject</li><li>Use valid subject identifier</li></ul>

### Sample Return

```
<reply status="ok" type="data_subjectlist">
  <subjects>
    <subject>
      <siteid>12345</ siteid >
      <sitenum>101</sitenum>
      <subid>5507</subid>
      <subnum>101001</subnum>
      <ident2>Cohort 1</ident2>
      <ident3>2011-04-13</ident3>
      <revnum>1</revnum>
      <statusid>15</statusid>
      <statusname>Screened</statusname>
      <deleted>f</deleted>
    </subject>
    <subject>
      <siteid>12345</ siteid >
      <sitenum>101</sitenum>
      <subid>5508</subid>
      <subnum>101101</subnum>
      <ident2>Cohort 2</ident2>
      <ident3>2011-04-13</ident3>
      <revnum>2</revnum>
      <statusid>15</statusid>
      <statusname>Enrolled</statusname>
      <deleted>t</deleted>
    </subject>
  </ subjects >
</reply>
```



## 4.4 data\_subjectlist

### Details

Field	Description / Notes
<i>siteid</i>	Internal ecos site id (never changes)
<i>sitenum</i>	Site # / Identifier
<i>subid</i>	Internal ecos subject id (never changes)
<i>subnum</i>	Subject Identifier / Number
<i>ident2</i>	Identifier 2 for subject – if used. Dates formatted as ISO, Check Box as X / empty
<i>ident3</i>	Identifier 3 for subject – if used. Dates formatted as ISO, Check Box as X / empty
<i>revnum</i>	Current CRF Revision for subject.
<i>statusid</i>	ID of subject status
<i>statusname</i>	Name of subject status
<i>deleted</i>	Whether currently marked deleted – t (true) or f (false)



## 4.5 data\_userlist

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>data_userlist</i>	Users in study	<ul style="list-style-type: none"><li>Filter on return</li><li>Use only values of <b>all</b>, <b>all-nonsubject</b>, <b>all-subject</b>, <b>pending</b>, <b>notpending</b>, <b>active</b>, <b>inactive</b>, <b>noedcconnects</b>, or <b>atleastoneedcconnect</b></li><li>Default is <b>all</b> if not indicated</li></ul>	-	-

### Sample Return

```
<reply status="ok" type="data_userlist">
  <users>
    <user>
      <internalid>1</internalid>
      <sitenum>101</sitenum>
      <sitename>Site 101</sitename>
      <siteid>512</siteid>
      <first>Eric</first>
      <middle></middle>
      <last>Smith</last>
      <login>mylogin</login>
      <email>eric.smith@etrials.com</email>
      <phone>x465</phone>
      <fax>653-3620</fax>
      <desroleid>5</desroleid>
      <desrolename>Primary Investigator</desrolename>
      <allsites>t</allsites>
      <othersitelist></othersitelist>
      <studystatus>Active</studystatus>
      <lastmbyid>1</lastmbyid>
      <lastmby>Smith, Eric</lastmby>
      <lastmdt>2011-04-21 15:34:10</lastmdt>
      <numstudylogins>108</numstudylogins>
      <generalactive>t</generalactive>
      <generalrole>Study Designer</generalrole>
    </user>
  </users>
</reply>
```



## 4.5 data\_userlist

### Details

Field	Description / Notes
<i>internalid</i>	ID of user – never changes
<i>sitenum</i>	Site # / Identifier for user
<i>sitename</i>	Site Name for user
<i>siteid</i>	Internal ecos site id for user
<i>first</i>	First Name
<i>middle</i>	Middle Initial / Name
<i>last</i>	Last name
<i>login</i>	User Login
<i>email</i>	Email
<i>phone</i>	Phone
<i>fax</i>	Fax
<i>desroleid</i>	ID of user role in study
<i>desrolename</i>	Name of user role in study
<i>allsites</i>	Whether user has all sites access – t (true) or f (false)
<i>othersitelist</i>	List of other sites – site numbers – listed with comma delimiting, forward and trailing commas
<i>lastmbyid</i>	Last modified by, internal ID
<i>lastmby</i>	Last modified by, name
<i>lastmdt</i>	Last modified date (ISO format)
<i>numstudylogins</i>	Number of connections to EDC
<i>generalactive</i>	Whether general account for the user is active
<i>generalrole</i>	General role within ecos (Study Designer, General, etc.)





## 4.6 data\_userhistory

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>data_userhistory</i>	User access	-	-	-

### Sample Return

```
<reply status="ok" type="data_userhistory">
  <userhistory>
    <userrevision>
      <userid>1</userid>
      <username>Emerton, Eric</username>
      <siteid>512</siteid>
      <sitenum>101</sitenum>
      <roleid>5</roleid>
      <rolename>Primary Investigator</rolename>
      <status>Active</status>
      <allsites>t</allsites>
      <othersites>,103,111,</othersites>
      <revision>2</revision>
      <lastmbyid>1</lastmbyid>
      <lastmby>Emerton, Eric</lastmby>
      <lastmdt>2011-07-05 19:31:33</lastmdt>
    </userrevision>
  </ userhistory >
</reply>
```

### Details

Field	Description / Notes
<i>userid</i>	ID of user – never changes, see internalid of data_userlist
<i>username</i>	Name of user
<i>siteid</i>	Site internal ID for primary site of user
<i>sitenum</i>	Site # / Identifier for primary site of user
<i>roleid</i>	Design role id
<i>rolename</i>	Design role name
<i>status</i>	Status of user – Pending, Active, Inactive



## 4.6 data\_userhistory

### Details (continued)

Field	Description / Notes
<i>allsites</i>	Whether user has access to all sites – t or f
<i>othersites</i>	List of other site access – site number, comma delimited. Included leading and trailing comma so that search of ,<sitenum>, is not ambiguous
<i>revision</i>	Current revision of history of user
<i>lastmbyid</i>	Last modified by, internal ID
<i>lastmby</i>	Last modified by, name
<i>lastmdt</i>	Last modified date (ISO format)



## 4.7 data\_userlogins

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>data_userhistory</i>	User logins to study	-	-	-

### Sample Return

```
<reply status="ok" type="data_userlogins">
  <userlogins>
    <userlogin>
      <userid>1</userid>
      <username>Emerton, Eric</username>
      < logindt >2011-07-06 01:54:36</ logindt >
    </userlogin>
    <userlogin>
      <userid>1</userid>
      <username>Emerton, Eric</username>
      <logindt>2011-07-05 21:19:45</ logindt >
    </userlogin>
  </ userlogins >
</reply>
```

### Details

Field	Description / Notes
<i>userid</i>	ID of user – never changes, see internalid of data_userlist
<i>username</i>	Name of user
<i>logindt</i>	Datetime (GMT) of connection to the study



## 4.8 data\_querylist

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>data_querylist</i>	Queries in study	<ul style="list-style-type: none"><li>Whether to include deleted subjects in return</li><li>Use only values of <b>yes</b> or <b>no</b></li><li>Default is <b>yes</b> if not indicated</li></ul>	<ul style="list-style-type: none"><li>Filter on deleted query or page deleted</li><li>Use only values of <b>all</b>, <b>not-pagedeleted</b>, <b>pagedeleted</b>, <b>notdeleted</b>, <b>deleted</b>, or <b>notdeleted-and-not-pagedeleted</b></li><li>Default is <b>all</b> if not indicated</li></ul>	<ul style="list-style-type: none"><li>Filter on status</li><li>Use only values of <b>all</b>, <b>answered</b>, <b>notanswered</b>, <b>closed</b>, <b>notclosed</b>, <b>notanswered-or-notclosed</b>, or <b>answered-or-closed</b></li><li>Default is <b>all</b> if not indicated</li></ul>

### Sample Return

```
<reply status="ok" type="data_querylist">
  <queries>
    <query>
      <subid>5513</subid>
      <subnum>102001</subnum>
      <visitid>10</visitid>
      <visitseq>0</visitseq>
      <pageid>10</pageid>
      <pageseq>0</pageseq>
      <controlid>1</controlid>
      <id>11</id>
      <typeid>15</typeid>
      <typename>Site Query</typename>
      <statusid>10</statusid>
      <statusname>Site Answered</statusname>
```

*(continued on next page)*



## 4.8 data\_querylist

### Sample Return (continued)

```
<answered>t</answered>
<closed>f</closed>
<sysqname></sysqname>
<subline>The subject line</subline>
<lastmbyid>1</lastmbyid>
<lastmby>Emerton, Eric</lastmby>
<lastmdt>2011-05-03 18:12:01</lastmdt>
<deleted>f</deleted>
<pagedeleted>f</pagedeleted>
<subjectdeleted>f</subjectdeleted>
<revision>3</revision>
<querycomments>
  <querycomment>
    <revision>3</revision>
    <lastmbyid>1480</lastmbyid>
    <lastmby>Emerton, Eric</lastmby>
    <lastmdt>2011-05-03 18:11:58</lastmdt>
    <comment> (marked query restored)</comment>
  </querycomment>
</querycomments>
</query>
</queries>
</reply>
```

### Details

Field	Description / Notes
<i>subid</i>	Internal ID of subject (never changes)
<i>subnum</i>	Subject # / Identifier
<i>visitid</i>	Visit ID of the EDC page
<i>visitseq</i>	Visit Sequence of the EDC page
<i>pageid</i>	Page ID of the EDC page
<i>pageseq</i>	Page Sequence of the EDC page
<i>controlid</i>	ID of control on page where query resides
<i>Typeid</i>	ID of query type
<i>typename</i>	Name of query type



## 4.8 data\_querylist

### Details (continued)

Field	Description / Notes
<i>statusid</i>	ID of query status
<i>statusname</i>	Name of query status
<i>answered</i>	Per rules of the query, whether query considered currently answered (t or f)
<i>closed</i>	Per rules of the query, whether query considered currently closed (t or f)
<i>sysqname</i>	If a System Query, name of system query
<i>subline</i>	Subject Line
<i>lastmbyid</i>	Last modified by, internal ID
<i>lastmby</i>	Last modified by, name
<i>lastmdt</i>	Last modified date (ISO format)
<i>deleted</i>	Whether query itself is marked deleted (t or f)
<i>pagedeleted</i>	Whether page query resides is currently deleted (t or f)
<i>subjectdeleted</i>	Whether subject currently deleted (t or f)
<i>revision</i>	Current revision number of the query
<i>querycomments</i>	Section of all comments. The revision 1 query comment is the initial details of the query
<i>querycomments.revision</i>	Revision # of the comment
<i>querycomments.lastmbyid</i>	Last modified by – for comment - internal ID
<i>querycomments.lastmby</i>	Last modified by – for comment - name
<i>querycomments.lastmdt</i>	Last modified date – for comment - (ISO format)
<i>querycomments.comment</i>	Comment at that revision



## 4.9 data\_pagelinksattachments

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>data_pagelinksattachments</i>	Page Attachments, Page Links	<ul style="list-style-type: none"><li>• Whether to include deleted subjects in return</li><li>• Use only values of <b>yes</b> or <b>no</b></li><li>• Default is <b>yes</b> if not indicated</li></ul>	<ul style="list-style-type: none"><li>• Filter the return</li><li>• Use only values of <b>all</b>, <b>links</b>, or <b>attachments</b></li><li>• Default is <b>all</b> if not indicated</li></ul>	-

### Sample Return

```
<reply status="ok" type="data_pagelinksattachments">
  <pagelinksattach>
    <linkattach>
      <subid>5507</subid>
      <subnum>101001</subnum>
      <visitid1>10</visitid1>
      <visitseq1>0</visitseq1>
      <pageid1>30</pageid1>
      <pageseq1>0</pageseq1>
      <visitid2></visitid2>
      <visitseq2></visitseq2>
      <pageid2></pageid2>
      <pageseq2></pageseq2>
      <filename>Emerton, Eric.doc</filename>
      <unblind>f</unblind>
      <comments>test</comments>
      <lastmbyid>1</lastmbyid>
      <lastmby>Emerton, Eric</lastmby>
      <lastmdt>2011-05-03 18:54:15</lastmdt>
    </linkattach>
    <linkattach>
      <subid>5507</subid>
      <subnum>101001</subnum>
      <visitid1>10</visitid1>
```

(continued on next page)



## 4.9 data\_pagelinksattachments

### Sample Return (continued)

```
<visitseq1>0</visitseq1>
<pageid1>30</pageid1>
<pageseq1>0</pageseq1>
<visitid2></visitid2>
<visitseq2></visitseq2>
<pageid2></pageid2>
<pageseq2></pageseq2>
<filename>documentOutput.doc</filename>
<unblind>t</unblind>
<comments>cccc</comments>
<lastmbyid>1</lastmbyid>
<lastmby>Emerton, Eric</lastmby>
<lastmdt>2011-05-03 18:54:08</lastmdt>
</linkattach>
</pagelinksattach>
</reply>
```

### Details

Field	Description / Notes
<i>subid</i>	Internal ID of subject (never changes)
<i>subnum</i>	Subject # / Identifier
<i>visitid1</i>	Visit ID of the EDC page (1 <sup>st</sup> of link, or where the file attached)
<i>visitseq1</i>	Visit Sequence of the EDC page (1 <sup>st</sup> of link, or where the file attached)
<i>pageid1</i>	Page ID of the EDC page (1 <sup>st</sup> of link, or where the file attached)
<i>pageseq1</i>	Page Sequence of the EDC page (1 <sup>st</sup> of link, or where the file attached)
<i>visitid2</i>	Visit ID of the EDC page (2nd of link)
<i>visitseq2</i>	Visit Sequence of the EDC page (2nd of link)
<i>pageid2</i>	Page ID of the EDC page (2nd of link)
<i>pageseq2</i>	Page Sequence of the EDC page (2nd of link)
<i>visitid1</i>	Visit ID of the EDC page (1 <sup>st</sup> of link, or where the file attached)
<i>filename</i>	If a page attachment, the name of the file attached
<i>unblind</i>	If a page attachment, whether user chose to indicate the attachment might contain unblinding information (should the question exist per design attributes)





## 4.9 data\_pagelinksattachments

### Details (continued)

Field	Description / Notes
<i>comments</i>	Any comments indicated by the user for the attachment or link
<i>lastmbyid</i>	Last modified by, internal ID
<i>lastmby</i>	Last modified by, name
<i>lastmdt</i>	Last modified date (ISO format)



## 4.10 data\_pagestatus

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>data_pagestatus</i>	Status of all pages in study, including no data pages	<ul style="list-style-type: none"><li>Whether to include deleted subjects in return</li><li>Use only values of <b>yes</b> or <b>no</b></li><li>Default is <b>yes</b> if not indicated</li></ul>	-	-

### Sample Return

```
<reply status="ok" type="data_pagestatus">
  <pagestatuses>
    <pagestatus>
      <subid>5507</subid>
      <subnum>101001</subnum>
      <visitid>10</visitid>
      <visitseq>0</visitseq>
      <pageid>10</pageid>
      <pageseq>0</pageseq>
      <statusid>0</statusid>
      <lastmbyid>1</lastmbyid>
      <lastmby>Emerton, Eric</lastmby>
      <lastmdt>2011-04-13 14:12:43</lastmdt>
      <lastmbyidd></lastmbyidd>
      <lastmbyd></lastmbyd>
      <lastmdtd></lastmdtd>
      <deleted>f</deleted>
      <revision>1</revision>
    </pagestatus>
  </pagestatuses>
</reply>
```

### Details

Field	Description / Notes
<i>subid</i>	Internal ID of subject (never changes)
<i>subnum</i>	Subject # / Identifier
<i>visitid</i>	Visit ID of the EDC page
<i>visitseq</i>	Visit Sequence of the EDC page



## 4.10 data\_pagestatus

### Details (continued)

Field	Description / Notes
<i>pageid</i>	Page ID of the EDC page
<i>pageseq</i>	Page Sequence of the EDC page
<i>statusid</i>	ID of the page status
<i>statusname</i>	Name of the page status
<i>lastmbyid</i>	Last modified by, internal ID – of the status of page
<i>lastmby</i>	Last modified by, name – of the status of page
<i>lastmdt</i>	Last modified date (ISO format) – of the status of page
<i>lastmbyidd</i>	Last modified by, internal ID – of the data on the page
<i>lastmbyd</i>	Last modified by, name – of the data on the page
<i>lastmdtd</i>	Last modified date (ISO format) – of the data on the page
<i>deleted</i>	Whether page currently marked deleted
<i>revision</i>	Revision number of the last update



## 4.11 data\_epro

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>data_epro</i>	ePROs in study, completed or incomplete	<ul style="list-style-type: none"><li>Whether to include deleted subjects in return</li><li>Use only values of <b>yes</b> or <b>no</b></li><li>Default is <b>yes</b> if not indicated</li></ul>	<ul style="list-style-type: none"><li>Filter on finished / not finished</li><li>Use only values of <b>all</b>, <b>finished</b>, or <b>notfinished</b></li><li>Default is <b>all</b> if not indicated</li></ul>	-

### Sample Return

```
<reply status="ok" type="data_epro">
  <epros>
    <epro>
      <subid>5405</subid>
      <subnum>101001</subnum>
      <visitid>150</visitid>
      <visitseq>0</visitseq>
      <pageid>10</pageid>
      <pageseq>5</pageseq>
      <started>2011-02-19 04:14:03</started>
      <ended>2011-02-19 04:31:52</ended>
    </epro>
    <epro>
      <subid>5405</subid>
      <subnum>101001</subnum>
      <visitid>150</visitid>
      <visitseq>0</visitseq>
      <pageid>20</pageid>
      <pageseq></pageseq>
      <started>2011-02-19 04:37:36</started>
      <ended></ended>
    </epro>
  </epros>
</reply>
```



## 4.11 data\_epro

### Details

Field	Description / Notes
<i>subid</i>	Internal ID of subject (never changes)
<i>subnum</i>	Subject # / Identifier
<i>visitid</i>	Visit ID of the EDC page
<i>visitseq</i>	Visit Sequence of the EDC page
<i>pageid</i>	Page ID of the EDC page
<i>pageseq</i>	Page Sequence of the EDC page – empty when epro not finished, i.e. not saved data. Only finished epros become pages in EDC
<i>started</i>	Start datetime of the epro (ISO format)
<i>ended</i>	End datetime of the epro (ISO format) – if finished
<i>status.id</i>	ID of subject status
<i>status.name</i>	Name of subject status
<i>status.imagefile</i>	Image for subject status
<i>status.esignature</i>	Whether status is an signature status – t or f
<i>status.datareadonly</i>	Whether data for page considered read only at the status – t or f



## 4.12 data\_rand

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>data_rand</i>	Randomization records in study. During live portion of study, blinded information shown per the design attributes settings for exports	-	-	-

### Sample Return

```
<reply status="ok" type="data_rand">
  <randlist>
    <rand>
      <randnum>1001</randnum>
      <statusid>3</statusid>
      <statusname>Used</statusname>
      <subid>5507</subid>
      <subnum>101001</subnum>
      <strataid></strataid>
      <assignid></assignid>
      <blockid></blockid>
      <revision>4</revision>
      <sitenum></sitenum>
      <comments>asdf</comments>
      <lastmbyid>1</lastmbyid>
      <lastmby>Emerton, Eric</lastmby>
      <lastmdt>2011-04-20 18:31:03</lastmdt>
    </rand>
  </randlist>
</reply>
```

### Details

Field	Description / Notes
<i>randnum</i>	Randomization number
<i>statusid</i>	Current status ID of randomization record
<i>statusname</i>	Current status name of randomization record
<i>subid</i>	Internal ID of subject (never changes) – if assigned



## 4.12 data\_rand

### Details (continued)

Field	Description / Notes
<i>subnum</i>	Subject # / Identifier - if assigned
<i>strataid</i>	ID of stratification of record (from study design) – shows per design attributes export settings
<i>assignid</i>	ID of randomization assignment (from study design) – shows per design attributes for export settings.
<i>blockid</i>	Block ID of record (if used) – shows per design attributes for export settings.
<i>revision</i>	Current revision number of record
<i>sitenum</i>	Number of site the record is associated with (if site based stratification being used – empty if study wide stratify / randomizing)
<i>comments</i>	Latest comments on the record
<i>lastmbyid</i>	Last modified by, internal ID
<i>lastmby</i>	Last modified by, name
<i>lastmdt</i>	Last modified date (ISO format)



## 4.13 data\_dispensebatches

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>data_dispensebatches</i>	Dispense batches in study	-	-	-

### Sample Return

```
<reply status="ok" type="data_dispensebatches">
  <dispensebatches>
    <batch>
      <id>1</id>
      <typeid>1</typeid>
      <typename>200 mg</typename>
      <statusid>1</statusid>
      <statusname>Active</statusname>
      <shipperid>544</shipperid>
      <shippernum>998</shippernum>
      <shippername>ACME Drug Shipping</shippername>
      <name>200 mg</name>
      <description>Some description on ID 1</description>
      <otherattribute1>Lot 123</otherattribute1>
      <otherattribute2>Batch 456</otherattribute2>
      <otherattribute3>PMD 454545</otherattribute3>
      <otherattribute4></otherattribute4>
      <expiration>2012-07-27</expiration>
      <comments></comments>
      <counttotal>62</counttotal>
      <countonhold>0</countonhold>
      <countatshipper>14</countatshipper>
      <countordered>17</countordered>
      <countintransit>0</countintransit>
      <countatsite>14</countatsite>
      <countdispensed>6</countdispensed>
      <countquarantined>1</countquarantined>
      <countwasted>10</countwasted>
      <countexpired>0</countexpired>
      <countunblinded>0</countunblinded>
      <lastmbyid>1</lastmbyid>
```

(continued on next page)





## 4.13 data\_dispensebatches

### Sample Return (continued)

```
<lastmby>Emerton, Eric</lastmby>
<lastmdt>2011-07-05 16:00:33</lastmdt>
<revision>17</revision>
</batch>
</dispensebatches>
</reply>
```

### Details

Field	Description / Notes
<i>id</i>	ID within the study (not ecos internal unique ID)
<i>typeid</i>	Dispense type id
<i>typename</i>	Dispense Type Name
<i>statusid</i>	ID of status of batch
<i>statusname</i>	Name of status of batch
<i>shipperid</i>	Internal id of shipper associated to batch
<i>shippernum</i>	Site Number of shipper associated to batch
<i>shippername</i>	Site Name of shipper associated to batch
<i>name</i>	Name of batch
<i>description</i>	Description of batch
<i>otherattribute1</i>	If used (from Design Attributes Optional) – the value for 1st other attribute
<i>otherattribute2</i>	If used (from Design Attributes Optional) – the value for 2nd other attribute
<i>otherattribute3</i>	If used (from Design Attributes Optional) – the value for 3rd other attribute
<i>otherattribute4</i>	If used (from Design Attributes Optional) – the value for 4th other attribute
<i>expiration</i>	Expiration date
<i>comments</i>	Current comments
<i>counttotal</i>	# total in batch
<i>countonhold</i>	# On Hold in batch (currently)
<i>countatshipper</i>	# Available at Shipper in batch (currently)



## 4.13 data\_dispensebatches

### Details (continued)

Field	Description / Notes
<i>countordered</i>	# Ordered in batch (currently)
<i>countintransit</i>	# In Transit in batch (currently)
<i>countatsite</i>	# At Site in batch (currently)
<i>countdispensed</i>	# Dispensed in batch (currently)
<i>countquarantined</i>	# Quarantined in batch (currently)
<i>countwasted</i>	# Wasted in batch (currently)
<i>countexpired</i>	# Expired in batch (currently)
<i>countunblinded</i>	# Unblinded in batch (currently)
<i>lastmbyid</i>	Last modified by, internal ID
<i>lastmby</i>	Last modified by, name
<i>lastmdt</i>	Last modified date (ISO format)
<i>revision</i>	Current revision number



## 4.14 data\_dispendisitems

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>data_dispendisitems</i>	Dispense records in study. During live portion of study, blinded information shown per the design attributes settings for exports	-	-	-

### Sample Return

```
<reply status="ok" type="data_dispendisitems">
  <dispendisitems>
    <item>
      <identifier>0172</identifier>
      <statusid>17</statusid>
      <statusname>Wasted</statusname>
      <shipment>1025</shipment>
      <shipmentfromid>544</shipmentfromid>
      <shipmentfromnum>998</shipmentfromnum>
      <shipmentfromname>ACME Drug Shipping</shipmentfromname>
      <shipmenttoid>564</shipmenttoid>
      <shipmenttonum>104</shipmenttonum>
      <shipmenttoname>Site 104</shipmenttoname>
      <typeid>2</typeid>
      <typename>Placebo</typename>
      <dispensebatchid>2</dispensebatchid>
      <dispensebatchname>Placebo</dispensebatchname>
      <sequencenumber>1906</sequencenumber>
      <expiration>2012-06-29</expiration>
      <visitid></visitid>
      <visitseq></visitseq>
      <pageid></pageid>
      <pageseq></pageseq>
      <controlid></controlid>
      <comments>shipment 1025 wasted</comments>
      <lastmbyid>1</lastmbyid>
      <lastmby>Emerton, Eric</lastmby>
      <lastmdt>2011-07-05 15:44:47</lastmdt>
      <revision>7</revision>
    </item>
  </dispendisitems>
</reply>
```

(continued on next page)



## 4.14 data\_dispenseitems

### Sample Return (continued)

```
</item>  
</dispenseitems>  
</reply>
```

### Details

Field	Description / Notes
<i>identifier</i>	Visible ID for the item, i.e. on the label / packaging
<i>statusid</i>	ID of status of item
<i>statusname</i>	Name of status of item
<i>shipment</i>	Shipment # - if currently part of a shipment
<i>shipmentfromid</i>	ID of site where shipment originates
<i>shipmentfromnum</i>	Site Number of site where shipment originates
<i>shipmentfromname</i>	Site Name of site for destination
<i>shipmenttoid</i>	ID of site for destination
<i>shipmenttonum</i>	Site Number of site for destination
<i>shipmenttoname</i>	Site Name of site for destination
<i>typeid</i>	Dispense type id
<i>typename</i>	Dispense Type Name
<i>dispensebatchid</i>	ID from dispense batches
<i>dispensebatchname</i>	Name from dispense batch
<i>sequencenumber</i>	Sequence Number – against which items are ordered or dispensed
<i>expiration</i>	Expiration date
<i>subid</i>	ID of subject – if dispensed
<i>subnum</i>	Identifier of subject – if dispensed
<i>visitid</i>	If dispensed, visit ID at which dispensed
<i>visitseq</i>	If dispensed, visit sequence at which dispensed
<i>pageid</i>	If dispensed, page ID at which dispensed
<i>pageseq</i>	If dispensed, page sequence at which dispensed
<i>controlid</i>	If dispensed, control ID (on page) at which dispensed
<i>comments</i>	Current comments
<i>lastmbyid</i>	Last modified by, internal ID
<i>lastmby</i>	Last modified by, name
<i>lastmdt</i>	Last modified date (ISO format)
<i>revision</i>	Current revision number



## 4.15 data\_dispenseshipments

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>data_dispenseshipments</i>	Shipments in study	-	-	-

### Sample Return

```
<reply status="ok" type="data_dispenseshipments">
  <dispenseshipments>
    <shipment>
      <id>1001</id>
      <statusid>3</statusid>
      <statusname>4</statusname>
      <fromid>544</fromid>
      <fromnum>998</fromnum>
      <fromname>ACME Drug Shipping</fromname>
      <toid>512</toid>
      <tonum>101</tonum>
      <toname>Site 101</toname>
      <orderdate>2011-05-26</orderdate>
      <sentdate>2011-05-26</sentdate>
      <receivedate>2011-05-26</receivedate>
      <comments>(confirmed arrived) : OK</comments>
      <counttotal>4</counttotal>
      <countquarantined>0</countquarantined>
      <lastmbyid>1</lastmbyid>
      <lastmby>Emerton, Eric</lastmby>
      <lastmdt>2011-05-26 19:35:50</lastmdt>
      <revision>5</revision>
      <items>
      </items>
    </shipment>
  </dispenseshipments>
</reply>
```

### Details

Field	Description / Notes
<i>id</i>	Shipment number
<i>statusid</i>	ID of status of item
<i>statusname</i>	Name of status of item



## 4.15 data\_dispenseshipments

### Details (continued)

Field	Description / Notes
<i>fromid</i>	ID of site where shipment originates
<i>fromnum</i>	Site Number of site where shipment originates
<i>fromname</i>	Site Name of site for destination
<i>toid</i>	ID of site for destination
<i>tonum</i>	Site Number of site for destination
<i>toname</i>	Site Name of site for destination
<i>orderdate</i>	Date of order
<i>sentdate</i>	If marked sent, date
<i>receivedate</i>	If marked received, date
<i>comments</i>	Current comments
<i>counttotal</i>	# of items in shipment
<i>countquarantined</i>	# of items currently at Quarantined status
<i>lastmbyid</i>	Last modified by, internal ID
<i>lastmby</i>	Last modified by, name
<i>lastmdt</i>	Last modified date (ISO format)
<i>revision</i>	Current revision number
<i>items</i>	Area with list of dispense items in the shipment
<i>item.identifier</i>	Dispense Item identifier
<i>item.currentstatusid</i>	Current status id of the dispense item
<i>item.currentstatusname</i>	Current status name of the dispense item
<i>item.comments</i>	Current comments of the dispense item
<i>item.lastmbyid</i>	Last modified by, internal ID (of dispense item)
<i>item.lastmby</i>	Last modified by, name (of dispense item)
<i>item.lastmdt</i>	Last modified date (ISO format) (of dispense item)
<i>item.revision</i>	Current revision number (of dispense item)



## 4.16 data\_dispensessitesettings

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>data_dispensessitesettings</i>	Site shipment settings in study	-	-	-

### Sample Return

```
<reply status="ok" type="data_dispensessitesettings">
  <dispensessitesettings>
    <site>
      <siteid>512</siteid>
      <sitenum>101</sitenum>
      <sitename>Site 101</sitename>
      <shipperid>544</shipperid>
      <shippernum>998</shippernum>
      <shippername>ACME Drug Shipping</shippername>
      <shipperactive>t</shipperactive>
      <siteactive>t</siteactive>
      <siteactiveshipments>t</siteactiveshipments>
      <comments></comments>
      <lastmbyid>1</lastmbyid>
      <lastmby>Emerton, Eric</lastmby>
      <lastmdt>2011-05-25 18:08:24</lastmdt>
      <revision>11</revision>
    </site>
  </dispensessitesettings>
</reply>
```

### Details

Field	Description / Notes
<i>siteid</i>	ID of site
<i>sitenum</i>	Site Number
<i>sitename</i>	Site Name
<i>shipperid</i>	ID of shipper the site is associated to
<i>shippernum</i>	Site Number of the shipper the site is associated to
<i>shippername</i>	Site Name of the shipper the site is associated to
<i>shipperactive</i>	Whether the shipper is currently active (t or f)
<i>siteactive</i>	Whether the site is currently active (main status, t or f)



## 4.16 data\_dispensessitesettings

### Details (continued)

Field	Description / Notes
<i>siteactiveshipments</i>	Whether the site is currently active to receive shipments (t or f)
<i>comments</i>	Current comments
<i>lastmbyid</i>	Last modified by, internal ID
<i>lastmby</i>	Last modified by, name
<i>lastmdt</i>	Last modified date (ISO format)
<i>revision</i>	Current revision number





## 4.17 data\_datatable

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>data_datatable</i>	EDC data table. As with other data table export formats, NO deleted subjects or pages are included.	* Valid table name (T) from page designs. Refer to Preview Data Exports for valid tables in the study.	-	-

### Sample Return

```
<reply status="ok" type="data_datatable">
  <data table="AE">
    <datarow>
      <value colname="SUBID">5507</value>
      <value colname="SUBNUM">101001</value>
      <value colname="VISITID">110</value>
      <value colname="VISITSEQ">0</value>
      <value colname="PAGEID">20</value>
      <value colname="PAGESEQ">1</value>
      <value colname="STATUSID">5</value>
      <value colname="EVENT">Headache</value>
      <value colname="DTONSET">2011-05-05</value>
      <value colname="DTSTOP"></value>
      <value colname="SEV">2</value>
      <value colname="RELATED">2</value>
      <value colname="ACTION">3</value>
      <value colname="OUTCOME"></value>
    </datarow>
  </data>
</reply>
```

### Details

Field	Description / Notes
<i>datarow</i>	Row of data
<i>datarow.value</i>	Values – defined by attribute of their column name (per page design). Note that the data values are per formatting: <ul style="list-style-type: none"><li>• Codes for codelist fields</li><li>• ISO for Dates</li><li>• HH:MI for Time</li><li>• X or empty for checkbox</li></ul>



## 4.18 data\_reports\_view

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>data_reports_view</i>	Report view, the schema of the XML depends on the report type. Run design_reports to gather report ID to pass to this function, and understand type of report from that design information fetch.	<ul style="list-style-type: none"><li>ID of report</li><li>Only valid ID from study reports is accepted, and the report must be active</li><li>User site rights and role rights are re-checked on fetch for valid access</li></ul>	-	-

### Sample Return

```
<reply status="ok" type="data_reports_view">
  <reportview reportid="10" projid="1422">
    <row type="header">
      <val style="">Subject</val>
      <val style="">Patient Initials</val>
      <val style="">Screening Date</val>
      <val style=""></val>
      <val style="">Page</val>
      <val style="">Page Status</val>
      <val style="">Event</val>
      <val style="">Event Start</val>
      <val style="">Event Action</val>
      <val style="">Med Start</val>
      <val style="">Med Name</val>
      <val style="">Med Indication</val>
    </row>
  </reportview>
</reply>
```

### Details

Field	Description / Notes
<i>row type</i>	the type of information being show
<i>val</i>	the information in that row



## 4.19 design\_studyattributes

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>design_studyattributes</i>	Main study attributes	-	-	-

### Sample Return

```
<reply status="ok" type="design_studyattributes">
  <studyattributes>
    <studyattribute>
      <section>Required Attributes</section>
      <id>5001</id>
      <name>Study Name</name>
      <description>Name appearing on reports, page headers, etc.</description>
      <value>A Rand Study (CRF Rev Strata)</value>
      <comment>comment here</comment>
      <lastmbyid>1</lastmbyid>
      <lastmby>Emerton, Eric [DES]</lastmby>
      <lastmdt>2011-05-04 20:11:30</lastmdt>
    </studyattribute>
  </studyattributes>
</reply>
```

### Details

Field	Description / Notes
<i>section</i>	Name of attribute section
<i>id</i>	Internal ID of the attribute
<i>name</i>	Name of attribute
<i>description</i>	Description of attribute
<i>value</i>	Current value of attribute – ISO for date, X (or empty) for check boxes
<i>comments</i>	Current comments about attribute
<i>lastmbyid</i>	Last modified by, internal ID
<i>lastmby</i>	Last modified by, name
<i>lastmdt</i>	Last modified date (ISO format)



## 4.20 design\_designattributes

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>design_designattributes</i>	All high level design attributes - required and optional	-	-	-

### Sample Return

```
<reply status="ok" type="design_designattributes">
  <designattributes>
    <designattribute>
      <section>Required Design Attributes</section>
      <id>5508</id>
      <name>EDC Date Format</name>
      <description>Format of date control field in EDC study pages.</description>
      <value>DD-MMM-YYYY</value>
      <comment>Imported from other study design (A Rand Study (Site Rand))</comment>
      <lastmbyid>1</lastmbyid>
      <lastmby>Emerton, Eric [DES]</lastmby>
      <lastmdt>2011-04-13 14:07:45</lastmdt>
    </designattribute>
    <designattribute>
      <section>Required Design Attributes</section>
      <id>5510</id>
      <name>Subject Label</name>
      <description>The label for added entities in the study. Examples: Subject, Patient, Device, Specimen, Hospital, County.</description>
      <value>Patient</value>
      <comment>Imported from other study design (A Rand Study (Site Rand))</comment>
      <lastmbyid>1</lastmbyid>
      <lastmby>Emerton, Eric [DES]</lastmby>
      <lastmdt>2011-04-13 14:07:45</lastmdt>
    </designattribute>
  </designattributes>
</reply>
```

### Details

Field	Description / Notes
<i>section</i>	Name of attribute section



## 4.20 design\_designattributes

### Details (continued)

Field	Description / Notes
<i>id</i>	Internal ID of the attribute
<i>name</i>	Name of attribute
<i>description</i>	Description of attribute
<i>value</i>	Current value of attribute – ISO for date, X (or empty) for check boxes
<i>comments</i>	Current comments about attribute
<i>lastmbyid</i>	Last modified by, internal ID
<i>lastmby</i>	Last modified by, name
<i>lastmdt</i>	Last modified date (ISO format)



## 4.21 design\_roles

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>design_roles</i>	Role definitions	-	-	-

### Sample Return

```
<reply status="ok" type="design_roles">
  <roles>
    <role>
      <id>30</id>
      <name>Administrator</name>
      <abbrev>ADM</abbrev>
      <imagefile>administrator.png</imagefile>
      <canaddsubject>t</canaddsubject>
      <caneditsubject>t</caneditsubject>
      <canaddeditdata>t</canaddeditdata>
      <cansignpages>t</cansignpages>
      <canaddquery>t</canaddquery>
      <caneditquery>t</caneditquery>
      <cansdv>t</cansdv>
      <candeleterestorepages>t</candeleterestorepages>
      <candeleterestoresubjects>t</candeleterestoresubjects>
      <canuploadpageattachments>t</canuploadpageattachments>
      <canuploadsitedocs>t</canuploadsitedocs>
      <unblinded>t</unblinded>
      <randadmin>t</randadmin>
      <dispenseadmin>t</dispenseadmin>
      <apiadmin>t</apiadmin>
      <importadmin>t</importadmin>
      <uploadsadmin>t</uploadsadmin>
      <candispense>t</candispense>
      <canconfirmshipments>t</canconfirmshipments>
      <caneditshipments>t</caneditshipments>
      <caneditdispenseitems>t</caneditdispenseitems>
      <caneditsshipmentsettings>t</caneditsshipmentsettings>
      <medcodingid>1201</medcodingid>
      <medcodingname>Browser</medcodingname>
      <canviewshipsettings>t</canviewshipsettings>
```

*(continued on next page)*



## 4.21 design\_roles

### Sample Return (continued)

```
<eamadmin>t</eamadmin>
<eamreadonly>t</eamreadonly>
<eamphaseone>t</eamphaseone>
<eamcoordinator>t</eamcoordinator>
<eamphasetwo>t</eamphasetwo>
<eamphasethree>t</eamphasethree>
<ameditevent>t</ameditevent>
<eamcreatedossier>t</eamcreatedossier>
<eamassignadjudicators>t</eamassignadjudicators>
<eamcreateoutcome>t</eamcreateoutcome>
<labsedit>t</labsedit>
<labsview>t</labsview>
<safetygen>f</safetygen>
<safetyview>f</safetyview>
</roles>
</reply>
```

### Details

Field	Description / Notes
<i>id</i>	ID of role
<i>name</i>	Name of role
<i>abbrev</i>	Abbreviation of role
<i>imagefile</i>	Image for role
<i>canaddsubject</i>	Whether can add subject – t or f
<i>caneditsubject</i>	Whether can edit subject information – t or f
<i>cannaddeditdata</i>	Whether can add or edit page data – t or f
<i>cansignpages</i>	Whether can sign pages – t or f (additional permissions in the page statuses)
<i>canaddquery</i>	Whether can add queries – t or f (additional permissions in the query types)
<i>caneditquery</i>	Whether can edit subject – t or f (additional permissions in the query types)
<i>cansdv</i>	Whether can SDV fields – t or f



## 4.21 design\_roles

### Details (continued)

Field	Description / Notes
<i>candeleterestore-pages</i>	Whether can mark pages deleted or restore them – t or f
<i>candeleterestoresubjects</i>	Whether can mark subjects deleted or restore them – t or f
<i>canuploadpageattachments</i>	Whether can upload documents to CRFs – t or f
<i>canuploadsitedocs</i>	Whether can upload documents to the Site Docs tab – t or f
<i>unblinded</i>	Whether considered unblinded – t or f
<i>randadmin</i>	Whether is a role is considered a randomization admin (if module in use) – t or f
<i>dispenseadmin</i>	Whether is a role is considered a dispense / item admin (if module in use) – t or f
<i>apiadmin</i>	Whether is a role that can use the API (if module in use) – t or f
<i>importadmin</i>	Whether is a role that can use the Data Imports (if module in use) – t or f
<i>uploadsadmin</i>	Whether is a role that is considered an admin for uploads in EDC - t or f
<i>candispense</i>	Whether is a role that can dispense items (if module in use) – t or f
<i>canconfirmshipments</i>	Whether is a role that can confirm a shipment sent or arrived (if module in use) – t or f
<i>caneditshipments</i>	Whether is a role that can edit a shipment (if module in use) – t or f
<i>caneditdispenseitems</i>	Whether is a role that can edit dispense items (if module in use) – t or f
<i>caneditshipmentsettings</i>	Whether is a role that can edit site shipment settings (if module in use) – t or f
<i>canviewshipmentsettings</i>	Whether is a role that can view site shipment settings (if module in use) – t or f
<i>medcodingid</i>	ID of medical coding role (if module in use)
<i>medcodingname</i>	Name of medical coding role (if module in use)
<i>eamadmin</i>	Whether is a role is considered an endpoint adjudication admin (if module in use) – t or f





## 4.21 design\_roles

### Details (continued)

Field	Description / Notes
<i>eamreadonly</i>	Whether is a role that has read only access to the EAM module (if module in use) – t or f
<i>eamphaseone</i>	Whether is a role that can be assigned as Phase One adjudicator (if module in use) – t or f
<i>eamcoordinator</i>	Whether is a role that can be assigned as Event Coordinator (if module in use) – t or f
<i>eamphasetwo</i>	Whether is a role that can be assigned as Phase Two adjudicator (if module in use) – t or f
<i>eamphasethree</i>	Whether is a role that can be assigned as Phase Three adjudicator (if module in use) – t or f
<i>eameditevent</i>	Whether is a role that can edit the EAM event (if module in use) – t or f
<i>eamcreatedossier</i>	Whether is a role that can create an EAM dossier (if module in use) – t or f
<i>eamassignadjudicators</i>	Whether is a role that can assign adjudicators to an event (if module in use) – t or f
<i>eamcreateoutcome</i>	Whether is a role that can generate the EAM outcome (if module in use) – t or f
<i>labsedit</i>	Whether is a role that can edit items in the Lab Normals module (if module in use) – t or f
<i>labsview</i>	Whether is a role that can view items in the Lab Normals module (if module in use) – t or f
<i>safetygen</i>	Whether is a role that can generate Safety forms (if module in use) – t or f
<i>safetyview</i>	Whether is a role that can view Safety forms (if module in use) – t or f



## 4.22 design\_subjectstatus

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>design_subjectstatus</i>	Subject status definitions, jump permissions	-	-	-

### Sample Return

```
<reply status="ok" type="design_subjectstatus">
  <subjectstatusdefinitions>
    <statuses>
      <status>
        <id>0</id>
        <name>Enrolled</name>
        <imagefile>substatus_added.png</imagefile>
        <datareadonly>f</datareadonly>
      </status>
      <status>
        <id>5</id>
        <name>Completed</name>
        <imagefile>substatus_complete.png</imagefile>
        <datareadonly>t</datareadonly>
      </status>
      <permission>
        <statusidfrom>0</statusidfrom>
        <statusnamefrom>Enrolled</statusnamefrom>
        <statusidto>5</statusidto>
        <statusnameto>Completed</statusnameto>
        <roleid>10</roleid>
        <rolename>Study Coordinator</rolename>
        <randmove>f</randmove>
        <unblindmove>f</unblindmove>
      </permission>
    </permissions>
  </subjectstatusdefinitions>
</reply>
```

### Details

Field	Description / Notes
<i>status.id</i>	ID of subject status
<i>status.name</i>	Name of subject status



## 4.22 design\_subjectstatus

### Details (continued)

Field	Description / Notes
<i>status.imagefile</i>	Image for subject status
<i>status.datareadonly</i>	Whether data for subject considered read only at the status – t or f
<i>permission</i> <i>.statusfromid</i>	For a status move, the status from ID
<i>permission</i> <i>.statusfromname</i>	For a status move, the status from name
<i>permission</i> <i>.statusfromid</i>	For a status move, the status to ID
<i>permission</i> <i>.statusfromname</i>	For a status move, the status to name
<i>permission.roleid</i>	For a status move, the ID of role
<i>permission.rolename</i>	For a status move, the name of role
<i>permission.randmove</i>	Whether considered a randomization move – t or f
<i>permission</i> <i>.unblindmove</i>	Whether considered a randomization move – t or f



## 4.23 design\_pagestatus

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>design_pagestatus</i>	Page status definitions, jump permissions	-	-	-

### Sample Return

```
<reply status="ok" type="design_subjectstatus">
  <pagestatusdefinitions>
    <statuses>
      <status>
        <id>0</id>
        <name>No Data</name>
        <imagefile>document_plain.png</imagefile>
        <signature>f</signature>
        <datareadonly>f</datareadonly>
        <revertto>f</revertto>
        <dkde1>f</dkde1>
        <dkde2>f</dkde2>
      </status>
    </statuses>
    <permissions>
      <permission>
        <statusidfrom>0</statusidfrom>
        <statusnamefrom>Enrolled</statusnamefrom>
        <statusidto>5</statusidto>
        <statusnameto>Completed</statusnameto>
        <roleid>5</roleid>
        <rolename>Primary Investigator</rolename>
      </permission>
    </permissions>
  </pagestatusdefinitions>
</reply>
```

### Details

Field	Description / Notes
<i>status.id</i>	ID of subject status
<i>status.name</i>	Name of subject status
<i>status.imagefile</i>	Image for subject status



## 4.23 design\_pagestatus

### Details (continued)

Field	Description / Notes
<i>status.esignature</i>	Whether status is an signature status – t or f
<i>status.datareadonly</i>	Whether data for page considered read only at the status – t or f
<i>status.revertto</i>	Whether status is used to revert to – should a new query be added, and query dictate that page status should revert – t or f
<i>dkde1</i>	If double key data entry module in use, whether status is considered the first of DKDE statuses
<i>dkde2</i>	If double key data entry module in use, whether status is considered the second of DKDE statuses
<i>permission.statusfromid</i>	For a status move, the status from ID
<i>permission.statusfromname</i>	For a status move, the status from name
<i>permission.statusto</i>	For a status move, the status to ID
<i>permission.statustoname</i>	For a status move, the status to name
<i>permission.roleid</i>	For a status move, the ID of role
<i>permission.rollename</i>	For a status move, the name of role



## 4.24 design\_querytypes

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>design_querytypes</i>	Query type/status definitions, jump permissions	-	-	-

### Sample Return

```
<reply status="ok" type="design_querytypes">
  <querytypedefinitions>
    <querytype>
      <id>15</id>
      <name>Site Query</name>
      <openblockpagepromote>t</openblockpagepromote>
      <openrevertpagestatus>t</openrevertpagestatus>
      <statuses>
        <status>
          <id>0</id>
          <name>Open</name>
          <statusmeansanswered>f</statusmeansanswered>
          <statusmeansclosed>f</statusmeansclosed>
        </status>
      </statuses>
      <permissions>
        <permission>
          <statusidfrom>0</statusidfrom>
          <statusnamefrom>Open</statusnamefrom>
          <statusidto>5</statusidto>
          <statusnameto>Answered</statusnameto>
          <roleid>30</roleid>
          <rolename>Administrator</rolename>
        </permission>
      </permissions>
      <rules>
        <rule>
          <canadd>35</canadd>
          <hidden>Test Role</hidden>
          <canmarkdeleted>f</canmarkdeleted>
          <roleid>35</roleid>
        </rule>
      </rules>
    </querytype>
  </querytypedefinitions>
</reply>
```

(continued on next page)



## 4.24 design\_querytypes

### Sample Return (continued)

```
<rolename>Test Role</rolename>
</rule>
</rules>
</querytype>
</querytypedefinitions>
</reply>
```

### Details

Field	Description / Notes
<i>id</i>	ID of query type
<i>name</i>	Name of query type
<i>openblockpagepromote</i>	Whether an open query of this type should block any page statuses moves
<i>openrevertpages-tatuse</i>	Whether the open of this query type should revert the page status – t or f
<i>statuses</i>	Area of status definitions for the query type
<i>status.id</i>	ID of subject status
<i>status.name</i>	Name of subject status
<i>status.statusmeansanswered</i>	Whether the status should consider the query closed
<i>status.statusmeansclosed</i>	Whether the status should consider the query answered (non-open, allows page status moves)
<i>permissions</i>	Area of permissions for the query type
<i>permission.statusfromid</i>	For a status move, the status from ID
<i>permission.statusfromname</i>	For a status move, the status from name
<i>permission.statusfromid</i>	For a status move, the status to ID
<i>permission.statusfromname</i>	For a status move, the status to name
<i>permission.roleid</i>	For a status move, the ID of role
<i>permission.rolename</i>	For a status move, the name of role
<i>rules</i>	Area of rules for the query type



## 4.24 design\_querytypes

### Details (continued)

Field	Description / Notes
<i>rule.canadd</i>	Whether the role can add this query type – t or f
<i>rule.hidden</i>	Whether the role has this type of query hidden – t or f
<i>rule.canmarkdeleted</i>	Whether the role can mark this type of query deleted – t or f
<i>rule.roleid</i>	ID of role for rule
<i>rule.rolename</i>	Name of role for rule





## 4.25 design\_codelists

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>design_codelists</i>	Codelist definitions in study, filter to only used, or view all. <b>NOTE:</b> System level codelists for page statuses, subject statuses, randomization assignments etc. included always	<ul style="list-style-type: none"><li>Filter on return</li><li>Use only values of <b>all</b> or <b>onlyinusebypage</b></li><li><b>onlyinusebypage</b> yields just codelists that are in use by some page design</li><li>Default is <b>all</b> if not indicated</li></ul>	-	-

### Sample Return

```
<reply status="ok" type="design_codelists">
  <codelists>
    <codelist>
      <id>9553</id>
      <name>Gender</name>
      <description></description>
      <items>
        <item code="1" hidden="f">Male</item>
        <item code="2" hidden="f">Female</item>
      </items>
    </codelist>
  </codelists>
</reply>
```

### Details

Field	Description / Notes
<i>id</i>	ID of codelist
<i>name</i>	Name of codelist
<i>description</i>	Description of codelist
<i>items</i>	The codelist items
<i>item.code</i>	Code of codelist item
<i>Item (contents of node)</i>	The display text of item
<i>item.hidden</i>	Whether the item is hidden in EDC – t or f



## 4.26 design\_pagedefinitions

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>design_pagedefinitions</i>	Page definitions in study, filter to only used, or view all	<ul style="list-style-type: none"><li>• Filter on return</li><li>• Use only values of <b>all</b>, <b>onlyinvisitdef</b> or <b>onlyinvisitscheduledef</b></li><li>• <b>onlyinvisitdef</b> yields just pages that are used in some visit definition, even if the visit is not in a visit schedule</li><li>• <b>onlyinvisitscheduledef</b> yields just pages that are used in some visit schedule</li><li>• Default is <b>all</b> if not indicated</li></ul>		

### Sample Return

```
<reply status="ok" type="design_pagedefinitions">
  <pagedefinitions>
    <page>
      <id>9526</id>
      <name>pDEMOG</name>
      <description>-</description>
      <controls>
        <control>
          <id>7</id>
          <displayorder>1</displayorder>
          <questtext>Initials</questtext>
          <helptext></helptext>
          <questypeid>103</questypeid>
          <questypename>Text Field</questypename>
          <odelistid></odelistid>
          <odelistname></odelistname>
          <beforedec></beforedec>
```

(continued on next page)



## 4.26 design\_pagedefinitions

### Sample Return (continued)

```
<afterdec></afterdec>
<maxlength>3</maxlength>
<size>3</size>
<indentlevel>0</indentlevel>
<table>DEMO</table>
<column>INITS</column>
<sdv>f</sdv>
<medcoding>f</medcoding>
<medcodingdictionaryid></medcodingdictionaryid>
<medcodingdictionary></medcodingdictionary>
</control>
</controls>
</page>
</pagedefinitions>
</reply>
```

### Details

Field	Description / Notes
<i>id</i>	ID of page design object
<i>name</i>	Name of page
<i>description</i>	Description of page
<i>controls</i>	The page controls items
<i>control.id</i>	ID of control – one of keys in any data export
<i>control.displaytext</i>	Visual display order in the page
<i>control.questext</i>	Question Text
<i>control helptext</i>	Hover help
<i>control.questypeid</i>	Type ID of the control
<i>control .questypename</i>	Name of control type
<i>control.codelistid</i>	ID of codelist (if codelist type control)
<i>control.codelistname</i>	Name of codelist (if codelist type control)
<i>control.beforedec</i>	Before Decimal formatting (numeric type controls)
<i>control.afterdec</i>	After Decimal formatting (numeric type controls)



## 4.26 design\_pagedefinitions

### Details (continued)

Field	Description / Notes
<i>control.maxlength</i>	Max Length (text field controls)
<i>control.size</i>	Size visually (text field controls)
<i>control.indentlevel</i>	Control visual indent level
<i>control.table</i>	Table name
<i>control.column</i>	Column name
<i>control.sdv</i>	Whether a SDV field – t or f
<i>control.medcoding</i>	Whether a medical coding field – t or f
<i>control.medcodingdictionaryid</i>	ID of medical coding dictionary (if medical coding control)
<i>control.medcodingdictionaryname</i>	ID of medical coding dictionary (if medical coding control)



## 4.27 design\_visitdefinitions

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>design_visitdefinitions</i>	Visit definitions in study, filter to only used, or view all	<ul style="list-style-type: none"><li>Filter on return</li><li>Use only values of <b>all</b> or <b>onlyinvisible</b></li><li><b>onlyinvisible</b> yields just visits that are used in some visit schedule</li><li>Default is <b>all</b> if not indicated</li></ul>		

### Sample Return

```
<reply status="ok" type="design_visitdefinitions">
  <visitdefinitions>
    <visit>
      <id>9452</id>
      <name>Screening</name>
      <description>Screening Visit</description>
      <pages>
        <id>30</id>
        <name>MedHx Specify</name>
        <displayorder>3</displayorder>
        <repeats>t</repeats>
        <maxrepeats>0</maxrepeats>
        <repeatshelptext>For each body system abnormal, add a page below</repeatshelptext>
        <repeatingcontrols>1==Value</repeatingcontrols>
        <pagedesignobjectid>9530</pagedesignobjectid>
        <pagedesignobjectname>pMHABN</pagedesignobjectname>
      </page>
    </pages>
  </visit>
</visitdefinitions>
</reply>
```



## 4.27 design\_visitdefinitions

### Details

Field	Description / Notes
<i>id</i>	ID of visit design object (NOT visitid in a visit schedule)
<i>name</i>	Name of visit
<i>description</i>	Description of visit
<i>pages</i>	Page Designs that comprise the visit
<i>page.id</i>	ID of page within the visit – will take on pageid in any data row (visitid/visitseq/pageid/pageseq combination)
<i>page.name</i>	Visual page name in EDC
<i>page.displayorder</i>	Display order in a visit in EDC (left to right)
<i>page.repeats</i>	Whether a repeating page – t or f
<i>page.maxrepeats</i>	If repeats, the maximum allowed – 0 for unlimited, -1 for disabled.
<i>page.repeatshelptext</i>	Text at top of repeating summary grid in EDC
<i>page.repeatingcontrols</i>	Controls / Texts that comprise the header column of a repeating grid in EDC
<i>page.pagedesignobjectid</i>	ID of page design (NOT pageid in data keys)
<i>Page.pagedesignobjectname</i>	Name of page design



## 4.28 design\_visitschedules

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>design_visitschedules</i>	Visit schedule definitions in study, filter to only used, or view all	<ul style="list-style-type: none"> <li>Filter on return</li> <li>Use only values of <b>all</b> or <b>onlyinusebysubject</b></li> <li><b>onlyinusebysubject</b> yields just visit schedules that currently in use by <b>non-deleted</b> subjects</li> <li>Default is <b>all</b> if not indicated</li> </ul>	-	-

### Sample Return

```

<reply status="ok" type="design_visitschedules">
  <visitschedules>
    <revision id="1">
      <visit>
        <id>10</id>
        <name>SCREENING</name>
        <abbrev>SCR</abbrev>
        <addwhen>On Add Subject</addwhen>
        <repeats>f</repeats>
        <maxrepeats></maxrepeats>
        <repeatshelptext></repeatshelptext>
        <visitdesignobjectid>9528</visitdesignobjectid>
        <visitdesignobjectname>vSCREEN</visitdesignobjectname>
        <pages>
          <page>
            <id>10</id>
            <name>Incl/Excl</name>
            <repeats>f</repeats>
            <maxrepeats></maxrepeats>
            <repeatshelptext></repeatshelptext>
            <repeatingcontrols></repeatingcontrols>
            <pagedesignobjectid>9465</pagedesignobjectid>
          </page>
        </pages>
      </visit>
    </revision>
  </visitschedules>
</reply>

```

(continued on next page)



## 4.28 design\_visitschedules

### Sample Return (continued)

```
<pagedesignobjectname>pINCL_EXCL_H</pagedesignobjectname>
</page>
</pages>
</visit>
</revision>
</visitschedules>
</reply>
```

### Details

Field	Description / Notes
<i>revision</i>	ID – the CRF revision ID, for the next section. One section in XML for each revision
<i>visits</i>	Visits in the revision
<i>visit.id</i>	Visit ID – this becomes visitid in any visitid/visitseq/pageid/pageseq combination
<i>visit.name</i>	Visual name of visit in EDC
<i>visit.abbrev</i>	Visit abbreviation – roll-up or status grid headings
<i>visit.addwhen</i>	When visit is added.
<i>visit.repeats</i>	Whether a repeating visit – t or f
<i>visit.maxrepeats</i>	If repeats, the maximum allowed – 0 for unlimited, -1 for disabled.
<i>visit.repeatshelptext</i>	Text when user attempt to add visit in EDC
<i>visit.visitdesignobjectid</i>	ID of visit design (NOT pageid in data keys)
<i>visit.visitdesignobjectname</i>	Name of visit design
<i>pages</i>	Pages that comprise the visit
<i>page.id</i>	ID of page within the visit – will take on pageid in any data row (visitid/visitseq/pageid/pageseq combination)
<i>page.name</i>	Visual page name in EDC
<i>page.repeats</i>	Whether a repeating page – t or f
<i>page.maxrepeats</i>	If repeats, the maximum allowed – 0 for unlimited, -1 for disabled.





## 4.28 design\_visitschedules

### Details (continued)

Field	Description / Notes
<i>page.repeatshelp</i> <i>text</i>	Text at top of repeating summary grid in EDC
<i>page</i> <i>.repeatingcontrols</i>	Controls / Texts that comprise the header column of a repeating grid in EDC
<i>page</i> <i>.pagedesignobjectid</i>	ID of page design (NOT pageid in data keys)



## 4.29 design\_revisions

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>design_revisions</i>	Revision definitions, includes basic definition, rules, permissions, and jumps	-	-	-

### Sample Return

```
<reply status="ok" type="design_revisions">
  <revisiondefinitions>
    <revisions>
      <revision>
        <id>1</id>
        <description>Cohort 1</description>
        <numvisits>16</numvisits>
        <numsubjects>10</numsubjects>
        <numrules>11</numrules>
        <numpagepermissions>2</numpagepermissions>
        <permissions>
          <permission>
            <visitid>10</visitid>
            <pageid>10</pageid>
            <perm>Hide / Live Exports</perm>
            <roleid>25</roleid>
            <rolename>Read Only</rolename>
          </permission>
        </permissions>
        <rules>
          <rule>
            <id>1</id>
            <typeid>1301</typeid>
            <typename>Data Value - Send Alert</typename>
            <visitid>10</visitid>
            <pageid>10</pageid>
            <controlid>2</controlid>
            <rulevalue>0</rulevalue>
            <active>f</active>
```

(continued on next page)



## 4.29 design\_revisions

### Sample Return (continued)

```
<definition>
  <def type="Email User">Yes</def>
  <def type="Email Site Alert">Yes</def>
  <def type="Email List"></def>
  <def type="Subject Line">Inc/Exclusion set to No</def>
  <def type="Body">hello</def>
</definition>
</rule>
</rules>
</revision>
</revisions>
<jumps>
  <jump>
    <idfrom>1</idfrom>
    <idto>2</idto>
  </jump>
</jumps>
</revisiondefinitions>
</reply>
```

### Details

Field	Description / Notes
<i>id</i>	ID of revision
<i>description</i>	Description of revision
<i>numvisits</i>	Number of visits in the revision's visit schedule
<i>numsubjects</i>	Current number of subjects at the revision in EDC
<i>numrules</i>	Number of Visit Schedule Rules for revision
<i>numpagepermissions</i>	Number of Visit Schedule Permissions for revision
<i>permissions</i>	Area describing page permissions
<i>permission.visitid</i>	Visit ID of the permission rule
<i>permission.pageid</i>	Page ID of the permission rule
<i>permission.perm</i>	Type of page permission
<i>permission.roleid</i>	ID of role for permission
<i>permission.rolename</i>	Name of role for permission



## 4.29 design\_revisions

### Details (continued)

Field	Description / Notes
<i>rules</i>	Area describing visit schedule rules
<i>rule.id</i>	ID within study of the rule
<i>rule.typeid</i>	ID of rule type
<i>rule.typename</i>	Name of rule type
<i>rule.visitid</i>	Visit ID where the rule resides
<i>rule.pageid</i>	Page ID where the rule resides
<i>rule.controlid</i>	Control ID where rule resides (if applicable)
<i>rule.rulevalue</i>	Value for comparison (e.g. in Data Alert Rule)
<i>rule.active</i>	Whether the rule is active – t or f
<i>rule.definition</i>	Series of type / value pairs that describe the rule – depends on the type, which pairs are seen here.
<i>jumps</i>	All revision jumps
<i>jump.idfrom</i>	The revision ID from in a From -> To jump
<i>jump.idto</i>	The revision ID to in a From -> To jump



## 4.30 design\_visitschedulepermissions

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>design_visitschedulepermis-</i>	Visit schedule permissions, across all revisions	-	-	-

### Sample Return

```
<reply status="ok" type="design_visitschedulepermissions">
  <visitschedulepermissions>
    <permission>
      <revision>1</revision>
      <visitid>10</visitid>
      <pageid>10</pageid>
      <perm>Hide / Live Exports</perm>
      <roleid>25</roleid>
      <rolename>Read Only</rolename>
    </permission>
  </visitschedulepermissions>
</reply>
```

### Details

Field	Description / Notes
<i>permission.revision</i>	CRF Revision ID for the permission
<i>permission.visitid</i>	Visit ID of the permission rule
<i>permission.pageid</i>	Page ID of the permission rule
<i>permission.perm</i>	Type of page permission
<i>permission.roleid</i>	ID of role for permission
<i>permission.rolename</i>	Name of role for permission



## 4.31 design\_visitschedulerrules

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>design_visitschedulerrules</i>	Visit schedule rules, across all revisions	-	-	-

### Sample Return

```
<reply status="ok" type="design_visitschedulerrules">
  <visitschedulerrules>
    <rule>
      <revision>1</revision>
      <id>1</id>
      <typeid>1301</typeid>
      <typename>Data Value - Send Alert</typename>
      <visitid>10</visitid>
      <pageid>10</pageid>
      <controlid>2</controlid>
      <rulevalue>0</rulevalue>
      <active>f</active>
      <definition>
        <def type="Email User">Yes</def>
        <def type="Email Site Alert">Yes</def>
        <def type="Email List"></def>
        <def type="Subject Line">Inc/Exclusion set to No</def>
        <def type="Body">hello</def>
      </definition>
    </rule>
  </visitschedulerrules>
</reply>
```

### Details

Field	Description / Notes
<i>rule.revision</i>	ID of CRF revision
<i>rule.id</i>	ID within study of the rule
<i>rule.typeid</i>	ID of rule type
<i>rule.typename</i>	Name of rule type
<i>rule.visitid</i>	Visit ID where the rule resides



## 4.31 design\_visitschedulerrules

### Details (continued)

Field	Description / Notes
<i>rule.pageid</i>	Page ID where the rule resides
<i>rule.controlid</i>	Control ID where rule resides (if applicable)
<i>rule.rulevalue</i>	Value for comparison (e.g. in Data Alert Rule)
<i>rule.active</i>	Whether the rule is active – t or f
<i>rule.definition</i>	Series of type / value pairs that describe the rule – depends on the type, which pairs are seen here.



## 4.32 design\_systemqueries

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>design_systemqueries</i>	System query definitions in study	<ul style="list-style-type: none"><li>Filter on return</li><li>Use only values of <b>all</b>, <b>onlyinvisitdef</b> or <b>onlyinvisitscheduleddef</b></li><li><b>onlyinvisitdef</b> yields just queries from pages that are used in some visit definition, even if the visit is not in a visit schedule</li><li><b>onlyinvisitscheduleddef</b> yields just queries from pages that are used in some visit schedule</li><li>Default is <b>all</b> if not indicated</li></ul>	-	-

### Sample Return

```
<reply status="ok" type="design_systemqueries">
  <systemqueries>
    <systemquery>
      <internalid>9560</internalid>
      <name>EEMULTI_VITALS</name>
      <pagedesignobjectid>9473</pagedesignobjectid>
      <pagedesignobjectname>pPHYSEXAM</pagedesignobjectname>
      <typeid>186</typeid>
      <typename>Other / Cross Page</typename>
      <message>"Date" is not equal to Vitals date at this visit</message>
      <conditions>SAME_VISIT--VTL.DT <> PE.DT ::: </conditions>
      <description></description>
      <controlid>1</controlid>
      <controltablecolumn>PE.DT</controltablecolumn>
      <active>f</active>
      <lastmbyid>1</lastmbyid>
      <lastmby>Emerton, Eric [DES]</lastmby>
```

(continued on next page)





## 4.32 design\_systemqueries

### Sample Return (continued)

```
<lastmdt>2011-04-13 14:07:43</lastmdt>
<numfiredtotal>0</numfiredtotal>
<numfiredopen>0</numfiredopen>
<numfiredanswered>0</numfiredanswered>
<numfiredclosed>0</numfiredclosed>
<numfireddeleted>0</numfireddeleted>
<numfiredorphaned>0</numfiredorphaned>
</systemquery>
</systemqueries>
</reply>
```

### Details

Field	Description / Notes
<i>internalid</i>	ID of query design object
<i>name</i>	Name of query
<i>pagedesignobjectid</i>	Page design ID the query is attached to
<i>pagedesignobject-name</i>	Name of page design the query is attached to
<i>typeid</i>	Type ID of the query
<i>typename</i>	Type name of the query
<i>message</i>	Message to the user
<i>conditions</i>	Conditions for the query to fire
<i>description</i>	Description / notes for the query
<i>controlid</i>	Control ID the query fires on (within the page design)
<i>controltablecolumn</i>	Table.Column of the control the query fires on (within the page design)
<i>active</i>	Whether query is active – t or f
<i>lastmbyid</i>	Last modified by, internal ID
<i>lastmby</i>	Last modified by, name
<i>lastmdt</i>	Last modified date (ISO format)
<i>numfiredtotal</i>	Currently fired – total
<i>numfiredopen</i>	Currently fired – and open



## 4.32 design\_systemqueries

### Details (continued)

Field	Description / Notes
<i>numfiredanswered</i>	Currently fired – and answered
<i>numfiredclosed</i>	Currently fired – and closed
<i>numfireddeleted</i>	Currently fired – but marked deleted
<i>numfiredorphaned</i>	Currently fired – but part of orphaned data due to a subject revision move



## 4.33 design\_reports

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>design_reports</i>	Report definitions	<ul style="list-style-type: none"><li>• Status of report(s) returned</li><li>• Use only values of <b>all</b>, <b>active</b> or <b>inactive</b></li><li>• Default is <b>all</b> if not indicated</li></ul>	-	-

### Sample Return

```
<reply status="ok" type="design_reports">
  <reports>
    <report>
      <id>3</id>
      <typeid>609</typeid>
      <typename>Study Standard: SDV Status/Percentages</typename>
      <name>SDV</name>
      <description></description>
      <active>t</active>
      <subjectpdf>f</subjectpdf>
      <showatlanding>f</showatlanding>
      <mobileenabled>f</mobileenabled>
      <lastmbyid>227</lastmbyid>
      <lastmby>Malok, Emily [DES]</lastmby>
      <lastmdt>2013-03-07 19:47:49</lastmdt>
      <definition>
      </definition>
      <roles>
        <role id="-1">ALL</role>
      </roles>
      <sites>
        <site>ALL</site>
      </sites>
    </report>
  </reports>
</reply>
```



## 4.33 design\_reports

### Details

Field	Description / Notes
<i>id</i>	ID of report
<i>typeid</i>	Type ID of the query
<i>typename</i>	Type name of the query
<i>name</i>	Visual name of report
<i>description</i>	Visual description of report
<i>active</i>	Whether report is active – t or f
<i>subjectpdf</i>	Whether the report is to be included in closeout PDFs (subject level reports only) – t or f
<i>lastmbyid</i>	Last modified by, internal ID
<i>lastmby</i>	Last modified by, name
<i>lastmdt</i>	Last modified date (ISO format)
<i>definition</i>	Area for definition – Label / value pairs – depending on type or report
<i>roles</i>	Roles that view the report – ID/name pairs. When ALL is used for role selection, ID appears as -1



## 4.34 design\_systemmessages

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>design_systemmessages</i>	System messages in EDC	<ul style="list-style-type: none"><li>Status of message(s) returned</li><li>Use only values of <b>all</b>, <b>active</b> or <b>inactive</b></li><li>Default is <b>all</b> if not indicated</li></ul>	-	-

### Sample Return

```
<reply status="ok" type="design_systemmessages">
  <systemmessages>
    <systemmessage>
      <id>17</id>
      <active>t</active>
      <important>f</important>
      <expiredate>2011-05-05</expiredate>
      <subject>The subject</subject>
      <message>Here is the message</message>
      <lastmbyid>1</lastmbyid>
      <lastmby>Emerton, Eric [DES]</lastmby>
      <lastmdt>2011-05-03 18:39:33</lastmdt>
      <roles>
        <role id="5">Primary Investigator</role>
        <role id="10">Study Coordinator</role>
      </roles>
      <studydocs>
        <studydoc>MyDoc.doc</studydoc>
      </studydocs>
    </systemmessage>
  </systemmessages>
</reply>
```

### Details

Field	Description / Notes
<i>id</i>	ID of report
<i>active</i>	Whether message is active – t or f
<i>Important</i>	Whether message is deemed important, and users see it first on entry to the study – t or f



## 4.34 design\_systemmessages

### Details (continued)

Field	Description / Notes
<i>expiredate</i>	The date the message should no longer show
<i>subject</i>	The subject line of message
<i>message</i>	The full message text
<i>lastmbyid</i>	Last modified by, internal ID
<i>lastmby</i>	Last modified by, name
<i>lastmdt</i>	Last modified date (ISO format)
<i>roles</i>	Roles that view the report – ID/name pairs. When ALL is used for role selection, ID appears as -1
<i>studydocs</i>	Names of one or more documents posted as part of the message



## 4.35 design\_strata

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>design_strata</i>	Stratification design information	-	-	-

### Sample Return

```
<reply status="ok" type="design_strata">
  <stratdefinitions>
    <stratagroup>
      <id>1</id>
      <name>Cohort 1</name>
      <cap></cap>
      <description>Cohort 1</description>
      <factors>
        <factor>
          <id>1</id>
          <typeid>1805</typeid>
          <typename>Subject CRF Revision</typename>
          <description></description>
          <definition>
            <def type="Condition">=</def>
            <def type="Value">1</def>
          </definition>
        </factor>
      </factors>
    </stratagroup>
  </stratdefinitions>
</reply>
```

### Details

Field	Description / Notes
<i>stratagroup.id</i>	ID of a strata group
<i>stratagroup.name</i>	Name of strata group
<i>stratagroup.cap</i>	Cap for strata group
<i>stratagroup.description</i>	Description of strata group
<i>stratagroup.factors</i>	Area for factors
<i>stratagroup.factors</i>	Area for factors – which if all true – place a subject in that group



## 4.35 design\_strata

### Details (continued)

Field	Description / Notes
<i>factor.id</i>	ID of factor in the study design
<i>factor.typeid</i>	Type ID for factor
<i>factor.typename</i>	Type name of factor
<i>factor.description</i>	Description of factor
<i>factor.definition</i>	Series of def Type/Value pairs that define the conditions of the factor





## 4.36 design\_rand

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>design_rand</i>	Randomization design information	-	-	-

### Sample Return

```
<reply status="ok" type="design_rand">
  <randdefinitions>
    <rand>
      <id>1</id>
      <name>Active</name>
      <cap></cap>
      <description>Active</description>
    </rand>
    <rand>
      <id>2</id>
      <name>Placebo</name>
      <cap></cap>
      <description>Placebo</description>
    </rand>
  </randdefinitions>
</reply>
```

### Details

Field	Description / Notes
<i>rand.id</i>	ID of a randomization assignment
<i>rand.name</i>	Name of randomization assignment
<i>rand.cap</i>	Cap for randomization assignment
<i>rand.description</i>	Description of randomization assignment



## 4.37 design\_dispensetypes

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>design_dispensetypes</i>	Dispense types design information	-	-	-

### Sample Return

```
<reply status="ok" type="design_dispensetypes">
  <dispensetypedefinitions>
    <dispensetype>
      <id>1</id>
      <name>200 mg</name>
      <defaultinitialship>8</defaultinitialship>
      <defaultfloorship>4</defaultfloorship>
      <defaultceilingship>10</defaultceilingship>
      <description>200 mg Active</description>
    </dispensetype>
    <dispensetype>
      <id>2</id>
      <name>Placebo</name>
      <defaultinitialship>8</defaultinitialship>
      <defaultfloorship>4</defaultfloorship>
      <defaultceilingship>10</defaultceilingship>
      <description>Placebo</description>
    </dispensetype>
  </dispensetypedefinitions>
</reply>
```

### Details

Field	Description / Notes
<i>id</i>	ID of dispense type
<i>name</i>	Name of dispense type
<i>defaultinitialship</i>	Should new site shipment settings be added – the initial ship value to use for this type
<i>defaultfloorship</i>	Should new site shipment settings be added – the floor value to use for this type
<i>defaultceilingship</i>	Should new site shipment settings be added – the ceiling ship value to use for this type
<i>description</i>	Description of type



## 4.38 design\_dispensetreatments

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>design_dispensetreatments</i>	Dispense treatments design information	-	-	-

### Sample Return

```
<reply status="ok" type="design_dispensetreatments">
  <dispensetreatmentdefinitions>
    <dispensetreatment>
      <id>1</id>
      <name>One 200 mg</name>
      <dispenseabledays>1</dispenseabledays>
      <description>One 200 mg.. at visit 1</description>
      <factors>
        <factor>
          <id>1</id>
          <typeid>1905</typeid>
          <typename>Current Rand Assignment</typename>
          <description></description>
          <definition>
            <def type="Condition">=</def>
            <def type="Value">1</def>
          </definition>
        </factor>
      </factors>
      <dispensetypes>
        <type>
          <id>1</id>
          <name>200 mg</name>
          <description>200 mg Active</description>
        </type>
      </dispensetypes>
    </dispensetreatment>
  </dispensetreatmentdefinitions>
</reply>
```



## 4.38 design\_dispensetreatments

### Details

Field	Description / Notes
<i>dispensetreatment.id</i>	ID of treatment
<i>dispensetreatment.name</i>	Name of treatment
<i>dispensetreatment.dispenseabledays</i>	Days that the treatment would be dispensed to a subject. Expiration dates of drug back up this many days, to ensure a treatment can be given to a subject.
<i>dispensetreatment.description</i>	Description of treatment
<i>dispensetreatment.factors</i>	Area for factors – which if all true – yields the treatment at dispense time
<i>factor.id</i>	Id of factor
<i>factor.typeid</i>	Type ID of factor
<i>factor.typename</i>	Type name of factor
<i>factor.description</i>	Description of factor
<i>factor.definition</i>	Pairs of def type / value
<i>dispensetreatment.dispensetypes</i>	Mapping of dispense types given when this treatment is selected
<i>dispensetypes.type.id</i>	Id of dispense type
<i>dispensetypes.type.name</i>	Name of dispense type
<i>dispensetypes.type.description</i>	Description of dispense type



## 4.39 `general_studylist`

Information Type	Description / Notes	Parameter 1	Parameter 2	Parameter 3
<i>general_studylist</i>	Studies currently logged in user has access to - general study access (i.e. general user), not with respect to any team.	<ul style="list-style-type: none"><li>Status of study account requests</li><li>Use only values of all, active, pending, or inactive</li><li>Default is all if not indicated</li></ul>	-	-

### Sample Return

```
<reply status="ok" type="general_studylist">
  <studyaccesses>
    <studyaccess>
      <studyid>1482</studyid>
      <sponsor>Merge Healthcare</sponsor>
      <name>myEDC 1.6.0 Demonstration Study</name>
      <statusid>853</statusid>
      <status>Inactive</status>
      <studystatus>Live</studystatus>
      <otherlanguages>German</otherlanguages>
      <roleid>30</roleid>
      <rolename>Administrator</rolename>
      <allsites>t</allsites>
      <sitelist></sitelist>
      <primaryorgid>1669</primaryorgid>
      <primaryorgname>Merge Clinic</primaryorgname>
      <primaryorgnumber>001</primaryorgnumber>
      <primaryorgactive>t</primaryorgactive>
    </studyaccess>
  </studyaccesses>
</reply>
```



## 4.39 general\_studylist

### Details

Field	Description / Notes
<i>studyid</i>	the ID of the study whose access is being displayed
<i>sponsor</i>	the sponsor of the study
<i>name</i>	the study name
<i>statusid</i>	the id for the user status
<i>status</i>	the user's status for the study
<i>studystatus</i>	the status of the study
<i>otherlanguages</i>	the languages other than English that are being used in the study
<i>roleid</i>	the id for the role assigned to the user
<i>rolename</i>	the name of the role assigned to the user
<i>allsites</i>	if the user has permission to access all sites – t or f
<i>sitelist</i>	the additional sites the user has access to, if applicable
<i>primaryorgid</i>	the system id of the site that is the user's primary site/organization
<i>primaryorgname</i>	the name of the site that is the user's primary site/organization
<i>primaryorgnumber</i>	the site # of the user's primary site/organization
<i>primaryorgactive</i>	whether or not the user's primary site/organization is active – t or f



## 4.40 Non-Interactive API Mode

For non-interactive usage, users can build an application that can make and receive web service calls.

### LOGIN SAMPLE

[https://eclinicalos.com/edc\\_studyservices.jsp?studyid=1234&action=login](https://eclinicalos.com/edc_studyservices.jsp?studyid=1234&action=login)

..with posts to fields 'login' and 'password' – would login to services

### LOGOUT SAMPLE

[https://eclinicalos.com/edc\\_studyservices.jsp?action=logout](https://eclinicalos.com/edc_studyservices.jsp?action=logout)

..will end the existing web services session

### FETCHING INFORMATION SAMPLE

[https://eclinicalos.com/edc\\_studyservices.jsp?action=infoattempt&type=design\\_roles](https://eclinicalos.com/edc_studyservices.jsp?action=infoattempt&type=design_roles)

.. will return the XML for the study's Role design, as seen in the 'Raw Server Return' of interactive mode. Type is the names as seen in the Information Type dropdown in interactive mode. Action must be 'infoattempt'. Action and Type can be field/value pairs posted as opposed to in the URL string itself.

### PASSING PARAMETERS TO THE CALL SAMPLE

[&param1=..value..&param2=..value...&param3=..value..](#)

in the URL, or have your application prepare the post to the server with fields / values of those names.

### FILE FOR IMPORT SAMPLE

[https://eclinicalos.com/edc\\_studyservices.jsp?action=importfile](https://eclinicalos.com/edc_studyservices.jsp?action=importfile)

... together with a filecontents=.. <the XML file contents>, and filename = <uniquefile name.xml>... will post a file into the Imports queue, just as if it was manually uploaded. eClinical OS batch processes will then act on the file as normal.



*NOTE: If no filename value is passed, a unique file name is generated. The system has guidelines for assigning a unique file name. It is strongly suggested that users provide a filename value. This will better describe the files contents for reference from the Imports tab summary table.*



## 4

## Practical Exercise

## DAISY

### Generating data\_subjectlist Results

1. In the study EDC, click the Imports/API tab.
2. Click the Interactive API Viewer link in the table header.
3. In the new window/tab, enter your eClinical OS login information and click Login. Your DAISY Study ID should already be in the appropriate field.

Attribute	Details
Information Type	data_subjectlist
Parameter 1	no
Parameter 2	< leave blank >
Parameter 3	< leave blank >

4. In the Choose Return box at the left, enter the following information:
5. Click View.



*NOTES: The system will default to the Study ID for the study you access the API from. You can enter a different Study ID to access another study, but you can only access one study at a time.*





4

## Self Assessment || Tips and Tricks



1. The API Services can be used interactively from EDC or non-interactively from a remote application.  
☐ True ☐ False
2. Using the interactive mode, if you call the design\_roles in a study that is not using Randomization/Stratification, you will not see the Rand Admin permission in the results.  
☐ True ☐ False
3. You will use your eClinical OS user name and password in combination with the Study ID to log in to a study's API Services.  
☐ True ☐ False



### Tips and Tricks

- ◆ You can view the full list of current information types and their parameters on screen when you log in to the interactive API mode.

Answers:

1. True   2. True   3. True



## Summary Page



### FINDING HELP

#### **Merge eClinical OS Technical Support**

[eclinicalos-support@merge.com](mailto:eclinicalos-support@merge.com)

#### **Merge Healthcare Help Desk**

For access to off-hours help, international phone numbers, and Live Chat options

Website: <http://www.merge.com/Support/Clinical-Trials.aspx>

By Phone: 1.888.500.4247

By Email: [eclinicalhelp@merge.com](mailto:eclinicalhelp@merge.com)