



Using Views in Study Editors and Reports

Overview: A "view" is the list of:

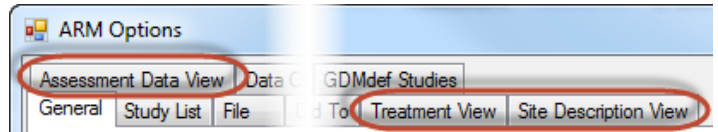
- Visible and hidden fields for a study editor, plus
- Other settings on the "View" dialog

Views are useful for **data entry** and **reporting**.

Data Entry

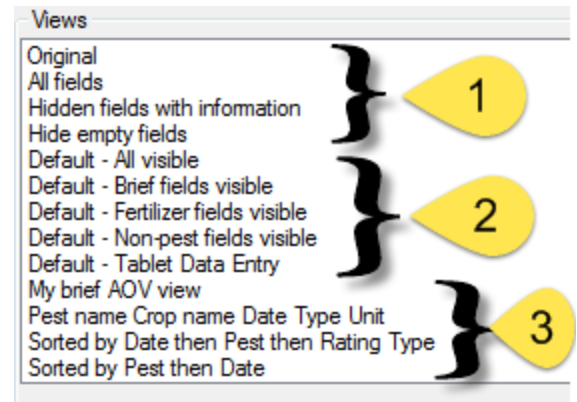
Separate view dialogs are available for these editors:

- Treatments
- Assessment Data
- Site Description + Header (in trials), or Protocol Description + Header (in protocols).



For each editor, there are several types of views:

1. Built-in views (part of ARM)
 - a. Original = visible fields before I changed a selection
 - b. All fields = display all hidden fields
 - c. Hidden fields with information
 - d. Hide empty fields = nice way to review or report only data entry fields that contain information
2. Default views for customization, identified as "Default" for standard GDMdef studies
3. Saved views created by me or my organization (or sometimes sent by sponsor with protocol or trial)
4. Transient views that result from manually hiding or displaying fields, but are never saved



All saved views (2 and 3) are stored in the main customization folder, such as "GDMdef". Views are saved with the file extensions: *.trv=treatments, *.pdv=assessments, *.trl.ddv=site description, *.prt.ddv=protocol description

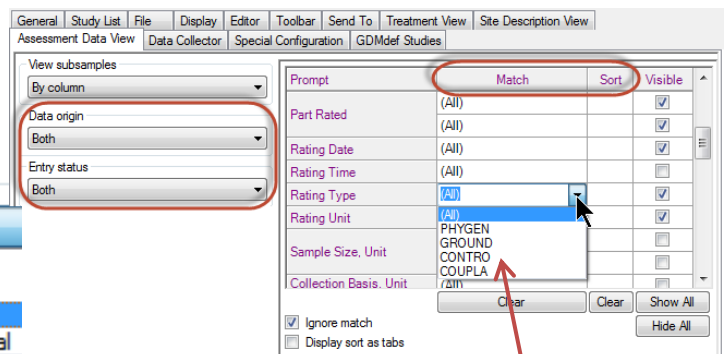
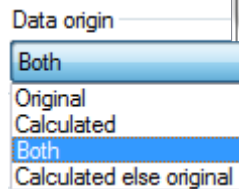
Why use views?

- Simplify editors by hiding data entry fields that are not applicable for the current trial
- So trialist/technician knows what information to collect and report
- Simplify reporting by printing the key data entry fields, hiding entry fields that are not applicable
- Automate selection and/or arrangement of assessment data columns for summary reports
- Provide consistent reports within an organization

Assessment Data Views

Assessment data editor offers additional options to select data columns to display, and change the order columns display and print.

- Data origin - filters for only original, only calculated, or "Calculated else original" which automatically hides original data columns for a multi-column SE that includes one or more calculated data columns
- Entry status - use 'Data' to hide columns with assessment header information and no data
- Match - display only assessment columns that contain a selected entry. See example above for Rating Type in G-All7_Herb_01 trial. For example, select "CONTRO" to display only weed control data columns.
- Sort - changes data column order based on multi-field sorts:

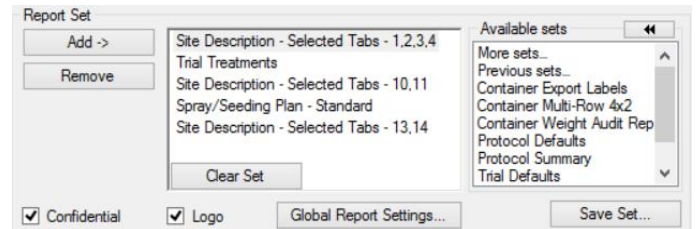
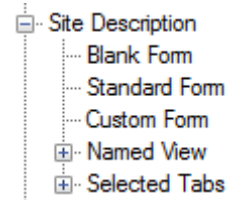


- Enter 1 in primary sort field, such as in Pest or Rating Date to sort together each Pest or assessment date into a group.
- Enter 2 in secondary sort field, such as Rating Type to keep a consistent sort order of different assessment types collected at each Rating Date.
- Enter 3, 4, etc. for additional sub-sorts to apply.

Reporting

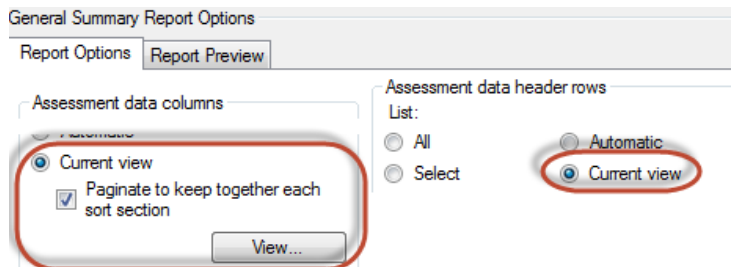
1. Site/Protocol Description

- Standard Form** uses the current view, and notifies if there are any hidden entry fields that contain information
- Use **Named View** to select a saved view for the report - does not change the current editor view
- Use **Selected Tabs** to change tab order or grouping, and subdivide site description
 - Click plus sign **+** by **Selected Tabs** to display the selection prompt.
 - Choose tabs to include for the particular section, and press **OK**.
 - These tabs are added as one entry in the current report set. More reports can then be added as desired.



2. Summary reports, to select:

- Assessment data
 - Columns to print and column order.
 - Select 'View' button to define or review the column view to use, or
 - Define column Match and Sort order
 - Use 'Paginate' checkbox to force page break if the next primary sort field entry cannot fit on current page.
 - Header rows to print, which can also be changed using the 'View' button.



b. Treatments

- On Global Report Settings - General tab
- Change to "Use visible treatment fields ..."
Note: Because typical a client's default view displays *many* treatment fields, this option is *not* the recommended default setting when printing Summary reports! It may require printing in landscape page layout.

