

# **MI Portal user guide**

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# Chapter 1. MI Portal user guide



## Dashboard Overview

The Dashboard contains list of application and list of Studies. From Studies, you can access Queries, Expedited Read Results, and Reports. Once you sign into the MI Portal you see the Dashboard with Applications List and the Study List panes.

The applications that appear in the Applications List are dependent on your permissions and link to separate applications within Medical Imaging.

The Study List contains a list of Studies that contains Queries, Expedited Read Results, and Reports tab.

The Studies that appear in this list are dependent on the permissions you have. You can filter the Study List by the name of the Sponsor if required.

From the Dashboard you can access your user profile where you can change your password and logout.

The icon with the question mark has options to open up a pdf document of the help guide, the training videos and Quick start guides.

The screenshot shows the MI Portal Dashboard. The top navigation bar includes the Perceptive logo, 'MI Portal', and a Help icon. The main content area is divided into two panes: 'Applications List' and 'Study List'.

**Applications List:** Contains a single entry for 'CSM Portal - for access to Site Services'.

**Study List:** Features a filter dropdown for 'All Sponsors' and a search box. Below is a table with the following data:

Sponsor	Program	Study Name	Study Id
ics		22	2
ences		ELI	E
		AB	U

At the bottom of the Study List, there is a 'Rows per page' dropdown set to 10, a pagination control showing page 1 of 1, and a note '3 items in 1 pages'.

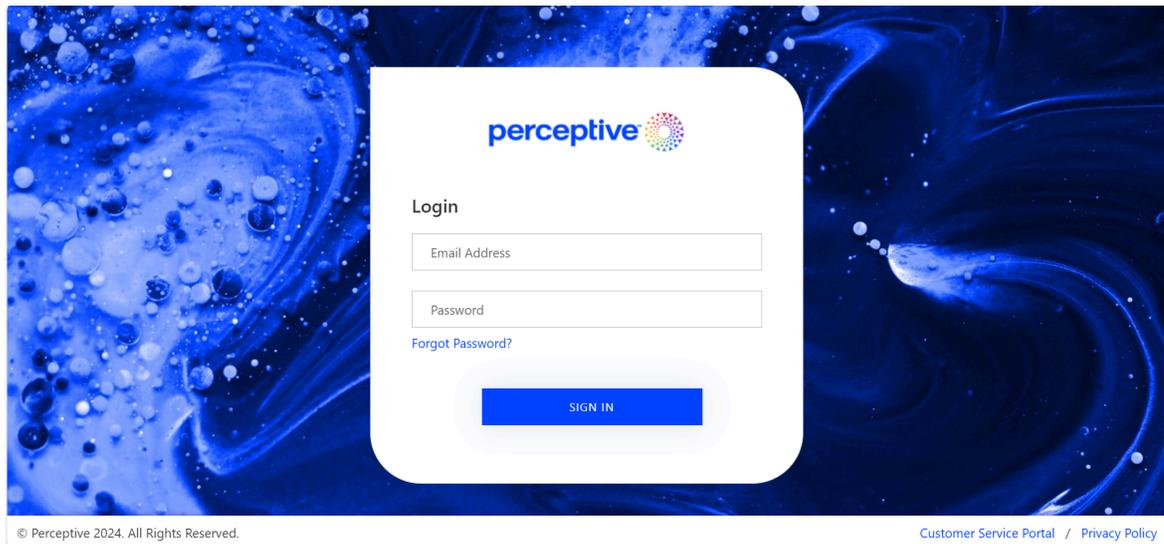
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## Sign In

Sign in to the portal when you require access. To Sign in to the portal:

1. Go to the MI Portal url : [Login-Calyx MI Portal \(b2clogin.com\)](https://login-calyx.com).
2. Type your Email Address.

3. Type your password. If you have forgotten your password see [Forgotten Password Reset \(on page 6\)](#).



The portal opens.

## Sign Out

Sign out of your profile as necessary. To Sign out of your profile:

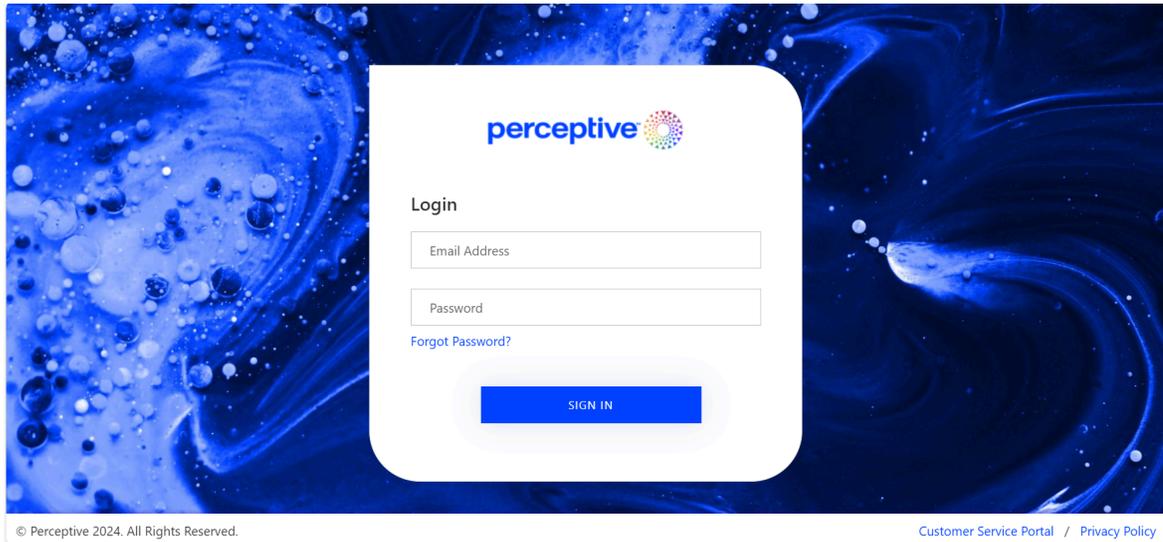
1. From the Dashboard, click the icon with your initials.
2. Click Logout.

A message appears: You have successfully logged out. Click [here](#) to login again.

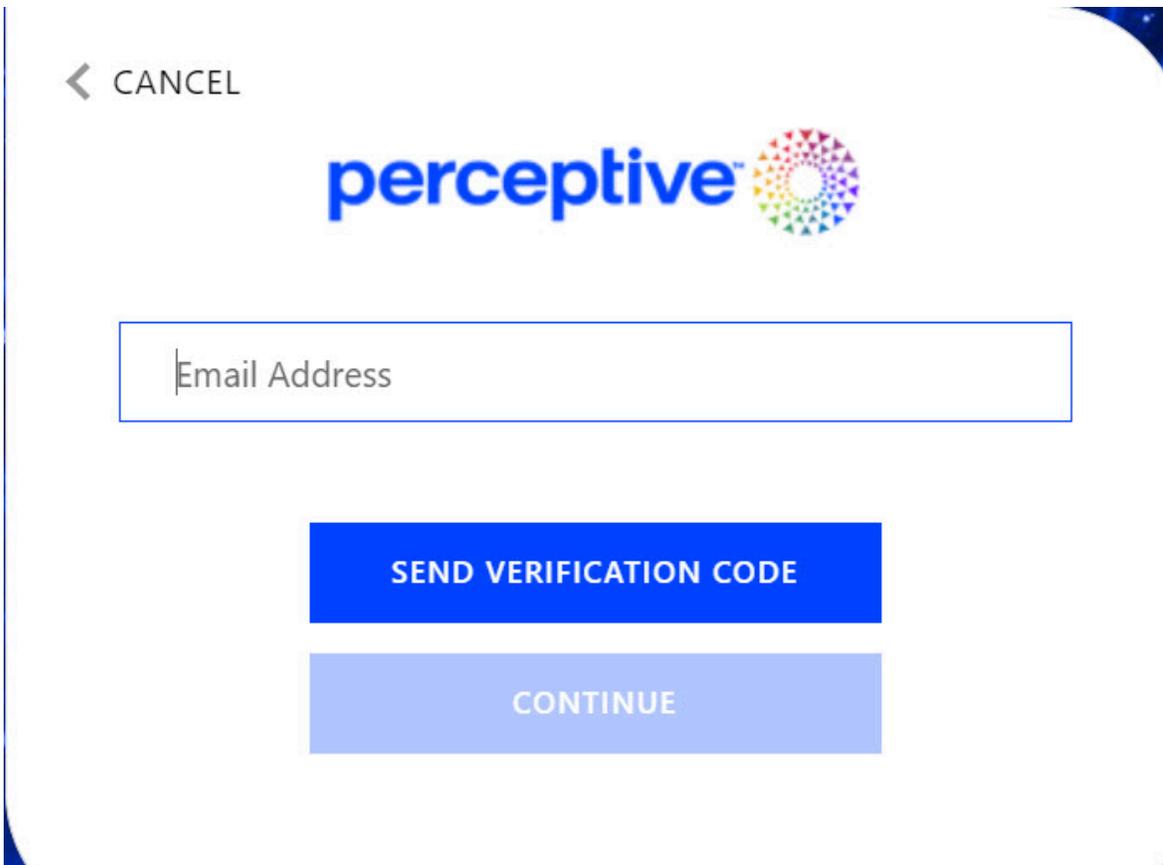
## Forgotten Password Reset

Reset your password if you have forgotten it. To reset your forgotten password:

1. From the *Login page* [Login-Calyx MI Portal \(b2clogin.com\)](#) click **Forgot Password**.



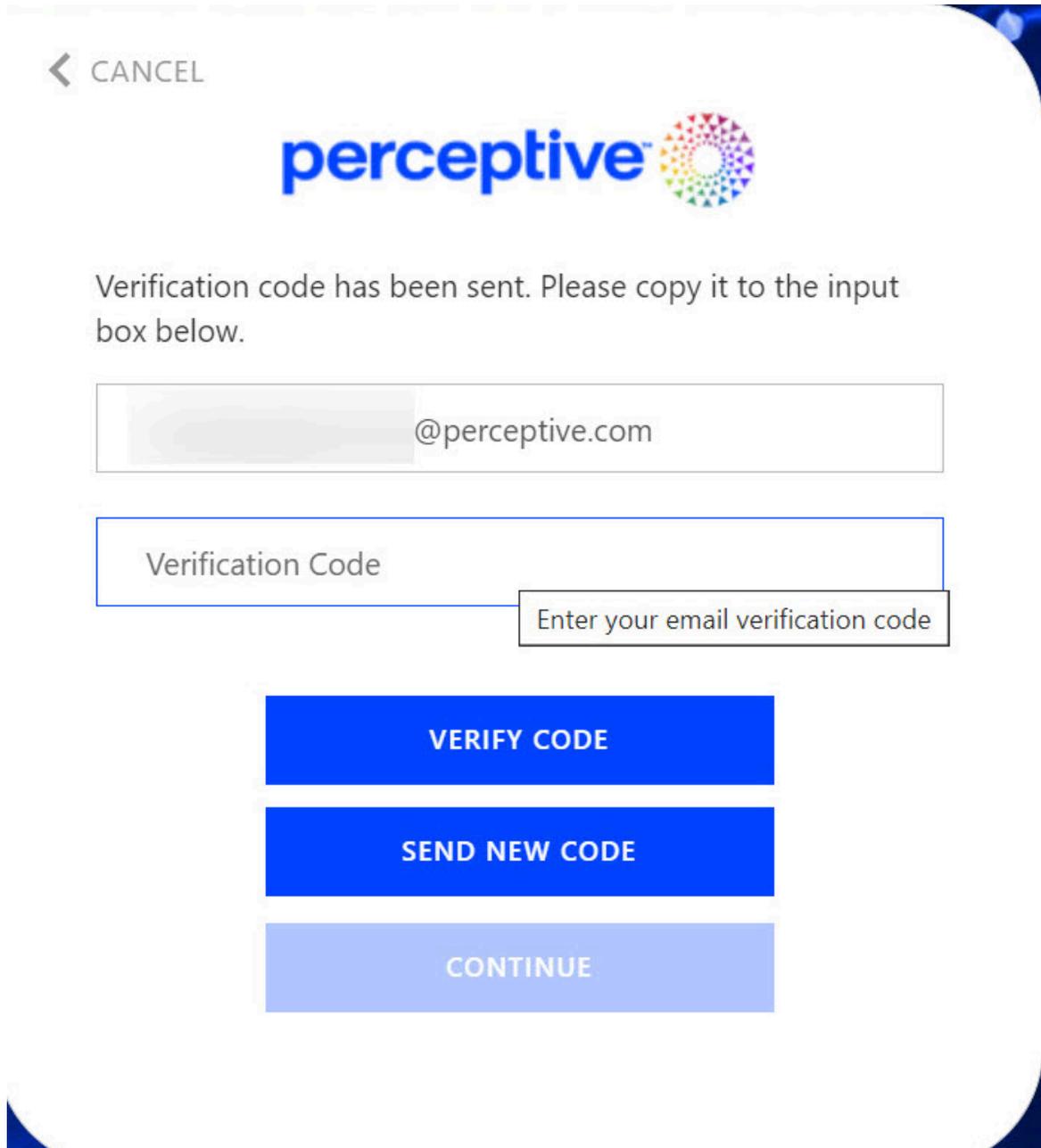
2. Type your Email Address.
3. Click **Send Verification Code**.





**Note:**

A message appears: Verification code has been sent. Please copy it to the input box below.



4. Open the Forgot Password email sent from Perceptive.
5. Copy the verification code from that email.
6. Type the verification code in the *verification code* window of step 3.
7. Click Verify Code.

**Note:**

A message appears: The code has been verified. You can now continue.

8. Click Continue.
9. Type your New Password.
10. Type the same password again to confirm it.
11. Click Continue.

< CANCEL

perceptive

New Password

Confirm New Password

CONTINUE

A message appears: Password has been reset successfully. Please continue to [login](#).

## Change Your Password

Change your password as necessary. You must know your current password to do this. To change your password:

1. From the Dashboard, click the icon with your initials.
2. Click Change Password.

The *customer portal login* page opens.

3. Type your New Password. See [Password Policy \(on page 10\)](#) for New Password requirements.

4. Confirm your new password.

5. Click Continue.

A message appears: Password has been changed successfully. Please continue to [login](#).

## Password Policy

Name	Value	Description
Old Password	8-16 characters of alphanumeric text that must contain 3 out of 4 of the following: <ul style="list-style-type: none"> <li>• Lowercase characters</li> <li>• Uppercase characters</li> <li>• Digits (0-9)</li> <li>• One or more of the following symbols (@,#,\$,%,&amp;,*,-,_,+,=,[,],{ }, ,/,;,:',~,(,); and .)</li> </ul>	The Old Password you want to change.

Name	Value	Description
New Password	8-16 characters of alphanumeric text that must contain 3 out of 4 of the following: <ul style="list-style-type: none"> <li>• Lowercase characters</li> <li>• Uppercase characters</li> <li>• Digits (0-9)</li> <li>• One or more of the following symbols (@,#,\$,%,^,&amp;*, -,_,+ ,=[,],{,}, ,\,/;:'`~,(,); and .)</li> </ul>	The New Password being created.
Confirm New Password	8-16 characters of alphanumeric text that must contain 3 out of 4 of the following: <ul style="list-style-type: none"> <li>• Lowercase characters</li> <li>• Uppercase characters</li> <li>• Digits (0-9)</li> <li>• One or more of the following symbols (@,#,\$,%,^,&amp;*, -,_,+ ,=[,],{,}, ,\,/;:'`~,(,); and .)</li> </ul>	Re-type the New Password to confirm it.

## Access to ServiceNow with Single Sign-On

Access ServiceNow with Single sign-on (SSO) from MI Portal application.

As an authenticated user of MI Portal application that has Azure Active Directory (AD) authentication enabled, you can access the ServiceNow portal with the Single sign-on capability from the Customer Service Portal link in the footer of the application. You are not required to enter the credentials again in the ServiceNow portal.

## Access Site Services

Steps to access Site Services from Customer Service Management (CSM) portal. To access Site Services:

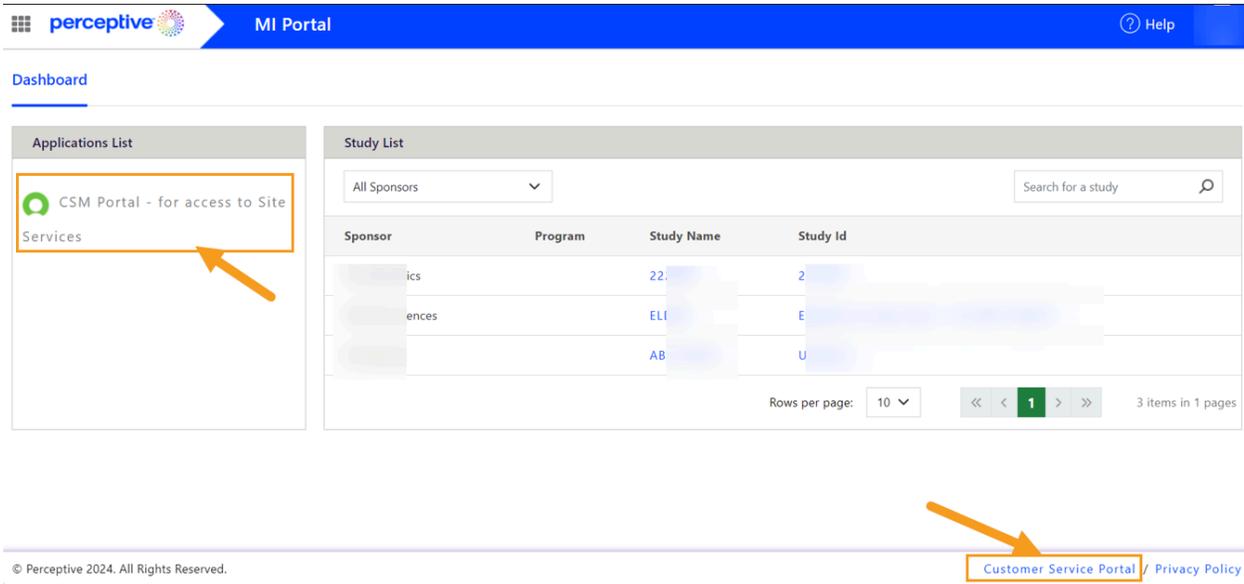
1. From the MI Portal Dashboard, in the Applications List pane, select CSM Portal - for access to Site Services.

The *Perceptive Service Line* page appears.

2. In the MI product pane, click View Catalogue. The *Medical Imaging* page appears.
3. In *Site Services* option, click View Requests.

The *Medical Imaging Site Services* page appears. You can select the required service.

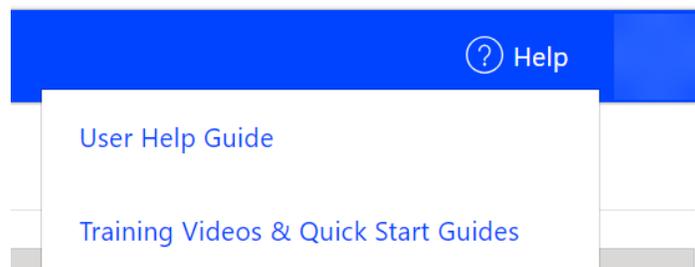
You can access to ServiceNow with Single sign-on via the CSM Portal in the Applications List section of the Dashboard page or via the Customer Service Portal.



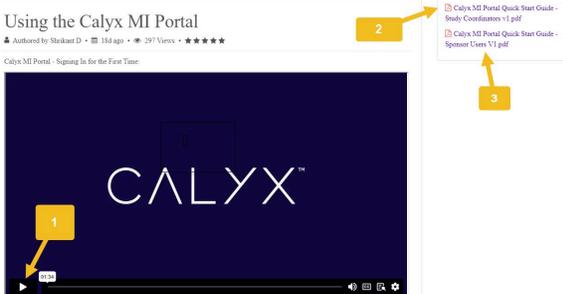
## Access Help Guides and Training Videos

Steps to access the User Help Guide and the Training Videos from the Dashboard page.

From the Dashboard click the Help icon and select the following options:



Options	Action/Description
User Help Guide	Opens the MI Portal .pdf a users help guide.
Training Videos and Quick Start Guides:	<p>a. Training Videos:</p> <p>The following four Training Videos are available:</p>

Options	Action/Description
	<ul style="list-style-type: none"> <li>• MI Portal - Signing In for First Time</li> <li>• MI Portal - The Dashboard</li> <li>• MI Portal - Finding &amp; Downloading Reports (Sponsors)</li> <li>• MI Portal - Viewing &amp; Responding to Queries (Sites)</li> </ul>
	2. Opens the MI Portal Quick Start Guide: Study Coordinators v1.pdf
	3. Opens the MI Portal Quick Start Guide: Sponsor Users v1.pdf

## Study Attributes

Name	Type	Description
Sponsor	Text	[Read-only] The name of the Sponsor.
Program	Text	[Read-only] The name of the program.
Study Name	Link	The name of the Study.
Study ID	Link	The unique identifier for the Study.

## User Roles and Permissions

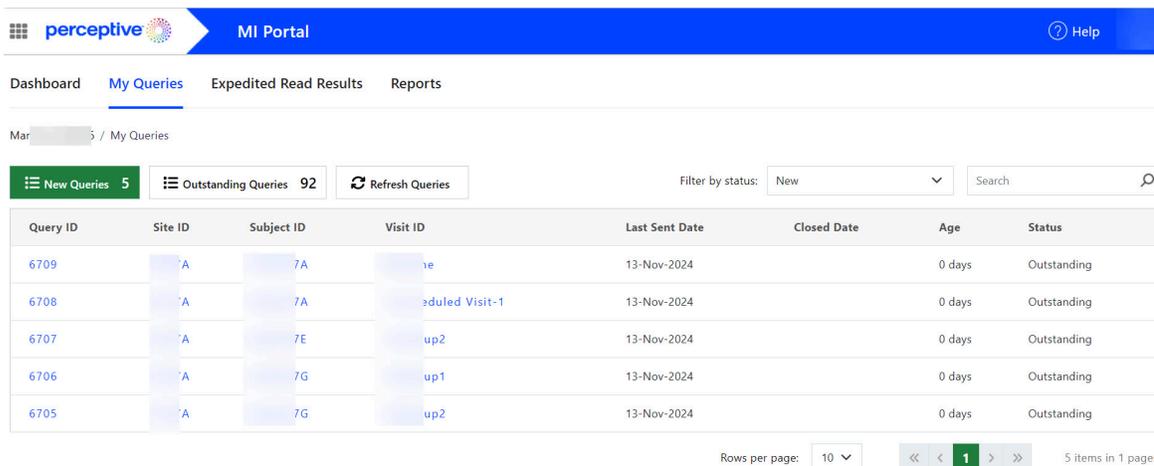
Role	Study Access	Site Access	External Portal Permission/Access
Study Coordinator	Multiple Studies	1 Site per Study	View, reply to Queries and view Expedited Read Results only for their sites.  View and download Expedited Read Results pdf reports only for their sites.
Sponsor	Multiple Studies	Multiple <b>Sites</b>	View and download Reports including Expedited Read Results report of the study.  View and download Expedited Read Results pdf reports of all sites.

Role	Study Access	Site Access	External Portal Permission/Access
Site Monitor	Multiple Studies	Multiple <b>Sites</b>	View and download Reports.
MI Technical Support	Multiple Studies	Multiple <b>Sites</b>	View only for both - Reports and queries. View and download Expedited Read Results pdf reports of all sites.
MI Internal	Multiple Studies	Multiple <b>Sites</b>	View and download Reports.
Clinical Research Associates (CRAs)	Multiple Studies	Multiple <b>Sites</b>	View and download Reports. View and download Expedited Read Results pdf reports only for their sites.
Clinical Research Organizations (CROs)	Multiple Studies	Multiple <b>Sites</b>	View and download Reports. View and download Expedited Read Results pdf reports of all sites.
Project Managers (PMs)	Multiple Studies	Multiple <b>Sites</b>	View and download Reports. View and download Expedited Read Results pdf reports of all sites.
Principal Investigator	Multiple Studies	Only for their sites	View and download Expedited Read Results pdf reports only for their sites.

## View Outstanding Queries

View Outstanding Queries that have not been resolved. To view an outstanding query:

1. From the Study List, select a Study. The My Queries tab opens.



2. Click Outstanding Queries.

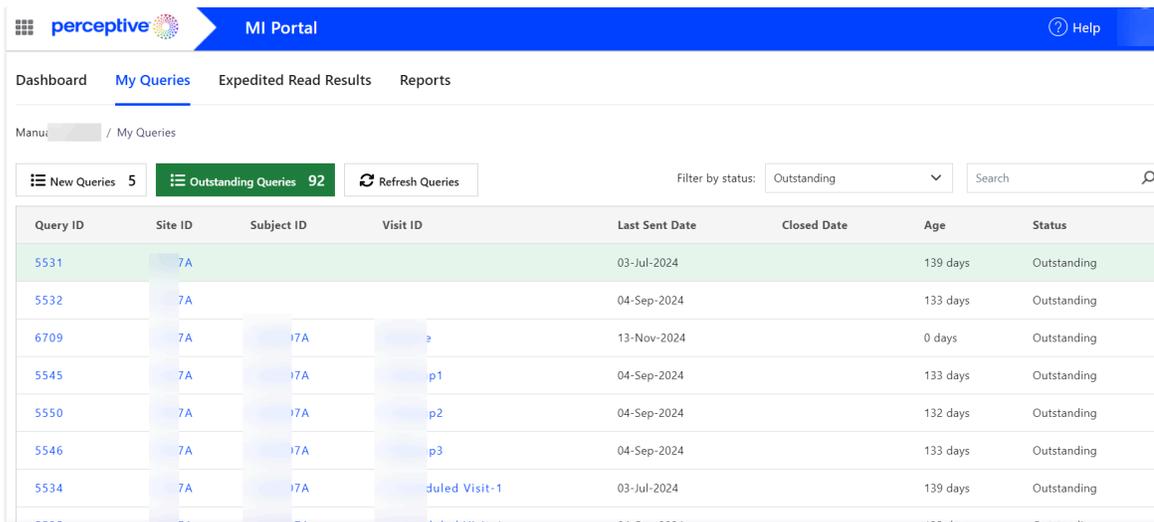
3. Select the query you want to view.

The *Query Details* page opens.

## View New Queries

View Queries to see specific details of the query. To view a query:

1. From the Study List, select a Study. The My Queries tab opens.



2. Click New Queries.

3. Select the query you want to view.

The *Query Details* page opens.

## My Queries Attributes

Name	Value	Description
Query ID	Link	Unique query identifier.
Site ID	Link	Unique Site identifier.
Subject ID	Link	Unique subject identifier.
Visit ID	Link	Unique visit identifier.
Last Sent Date	[Read-only]	The last date a query was sent.
Closed Date	[Read-only]	The date a query was closed.
Age	[Read-only]	The Age of the query in days.
Status	[Read-only]	Status of the query. See <a href="#">Status Attributes (on page 17)</a> for more details.

## My Queries Overview

Queries are opened to request further information as required.

My Queries contains a list of all Queries related to a Study received from the tracking system. You can respond to Queries opened/created by MI Portal team when additional information is required from the Site regarding an image, subject, visit or generally about the Site.

A query can be opened for data clarification to request missing images, image quality issues, or for any information necessary for the subject's data to be adequately reviewed.

There are New Queries and Outstanding Queries for each Study.

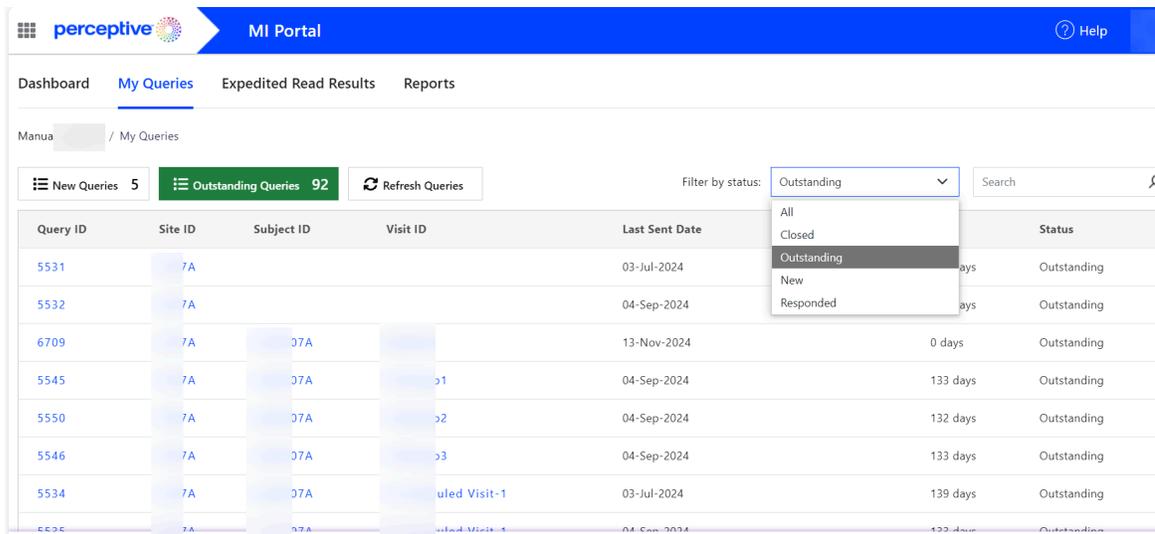
The New Queries list contains Queries for the last 30 days. Any Queries older than 30 days appear in the Outstanding Queries list.

You can filter the Queries by status, for example closed, Outstanding and so on. You can also search for Queries by entering a term into the search field.

## Filter Queries

You can filter Queries based on the status. To filter Queries:

1. From the Study List, select a Study. The My Queries tab opens.
2. Select a status from the Filter by Status drop-down. See [Filter by Status Attributes \(on page 17\)](#) for a description of the options.



The filtered results appear.

### Filter by Status Attributes

Name	Description
All	Queries in all statuses.
Closed	Queries that have been closed by the Perceptive team.
Outstanding	Queries that have not been resolved or closed.
New	Queries that have not been opened/viewed by the Site user.
Responded	Queries that Sites responded to but are not closed.
Overdue	Queries that have not been responded to within the defined turnaround time of the study.

### Search Queries

You can search Queries by using a specific term as required. To search Queries:

1. From the Study List, select a Study. The My Queries tab opens.

The screenshot shows the 'My Queries' tab in the MI Portal. At the top, there are navigation tabs: Dashboard, My Queries (selected), Expedited Read Results, and Reports. Below the navigation, there are filters for 'New Queries' (5) and 'Outstanding Queries' (92), along with a 'Refresh Queries' button. A 'Filter by status' dropdown is set to 'Outstanding', and there is a search field. The main content is a table with the following data:

Query ID	Site ID	Subject ID	Visit ID	Last Sent Date	Closed Date	Age	Status
5531	A			03-Jul-2024		139 days	Outstanding
5532	A			04-Sep-2024		133 days	Outstanding
6709	A	17A	ne	13-Nov-2024		0 days	Outstanding
5545	A	17A	rup1	04-Sep-2024		133 days	Outstanding

2. Type a search term in the search field.
3. Click Enter on your keyboard. The search results appear.

## View Query Details

View the Query Details as necessary. To view Query Details:

1. From the Study List, select a Study. The My Queries tab opens.
2. Select the Query.

The screenshot shows the 'Query Details' view for a specific query. The navigation tabs are the same as in the previous screenshot. The breadcrumb shows 'Manu / My Queries / 5329'. The 'Query Details' section contains a table with the following data:

Query ID	Site ID	Subject ID	Visit ID	Query Category	Age	Closed Date	To	CC	Query Originator	Status
5329	S1	Sub1406A	Followup1	Required Scan Missing	153 days		jdram@ , ng22@outlook.com, ng23@outlook.com		MIBIntegration@calyx.ai	Outstanding

Below the table, there is a 'Query History' section with a 'Show' link, and a 'Query Comments' section with a text area containing the message: 'Please submit the scan requested in the query for the Subject Number: "Sub1406A" to the Site ID: "S11" Visit Name: "Followup1"'

The Query Details tab opens.

View the Query Details in the table.

## View Query History

You can view the Query History to see previous Query activity. To view the Query History:

1. From the Study List, select a Study. The My Queries tab opens.
2. Select the Query.

perceptive MI Portal Help

Dashboard My Queries Expedited Read Results Reports

Main > My Queries / 5329

Query Details

Query ID	Site ID	Subject ID	Visit ID	Query Category	Age	Closed Date	To	CC	Query Originator	Status
5329	S11111	Sub1406A	Followup1	Required Scan Missing	153 days		am@calyx.ai 22@outlook.com 23@outlook.com		MIBIntegration@calyx.ai	Outstanding

Query History: Hide

Date	From	Query Comments
14-Jun-2024	MIBIntegration@calyx.ai	Please submit the scan requested in the query for the Subject Number: "Sub1406A" to the Site ID: "S11111" Visit Name: "Followup1"

Query Comments

Please submit the scan requested in the query for the Subject Number: "Sub1406A" to the Site ID: "S11111" Visit Name: "Followup1"

3. In the Query History field, click Show.

The Query History displays.

## Query Details Attributes

Name	Value	Description
Query ID	[Read-only]	Unique query identifier.
Site ID	[Read-only]	Unique Site identifier.
Subject ID	[Read-only]	Unique subject identifier.
Visit ID	[Read-only]	Unique visit identifier.
Query Category	[Read-only]	The category of the Query defined in the Perceptive system.
Age	[Read-only]	Age of the Query in days.
Closed Date	[Read-only]	The date the Query was closed.
To	[Read-only]	Receiver of the Query.
CC	[Read-only]	The copied receiver of the Query.
Query Originator	[Read-only]	The Query sender.
Status	[Read-only]	The status of the Query. See <a href="#">Status Attributes (on page 17)</a> for more details.

## Send Query Responses

Send Query Response as required. To send a Query Response:

1. From the Study List, select a Study. The My Queries tab opens.
2. Select the Query you want to respond to. The *Query Details* page opens.
3. Type the Query Response.

perceptive MI Portal

5329	S11	Sub1406A	Followup1	Required Scan Missing	153 days	i@c calyx.ai outlook.com	MIBIntegration@calyx.ai	Outstanding
------	-----	----------	-----------	-----------------------	----------	--------------------------------	-------------------------	-------------

Query History: [Show](#)

Query Comments

Please submit the scan requested in the query for the Subject Number: "Sub1406A" to the Site ID: "S11" Visit Name: "Followup1"

Query Response \*

Submitted the requested scan for the Subject Number: "Sub1406A" to the Site ID: "S11" Visit Name: "Followup1" on 12-Nov-2024.

Maximum limit is 2000 characters

< >

Send Response

4. Click Send Response.

A message appears: Your response sent successfully.

## Expedited Read Results

Once Site or Sponsor users are provisioned in MIB, by MIB admin user, MIB Project Manager or MIB Site Management user, they can view appropriate Expedited Read Results of their study within the MI Portal.

Site users can view a list of all results report for subjects at their site within the MI Portal:

- Sorted with the most recent at the top
- View Site, Subject, Visit, Date Report Generated

Sponsor users can view a list of all results report for all subjects across all sites within the MI Portal:

- Sorted with the most recent at the top
- View Site, Subject, Visit, Date Report Generated

Site and Sponsor users can:

- Open and Download pdf results report on-screen in real-time (that is, user clicks the report and can view it immediately in a separate window).

## Types of Expedited Read Results

There are two types of Expedited Read Results:

- Eligibility Cases: Results of the independent central imaging review for the eligibility visit used to help determine a subjects' inclusion or exclusion in a trial.
- Verification of Progressive Disease (VOPD): Progressive Disease results from the independent central imaging review for Visits where VOPD was requested.

## View Expedited Read Results

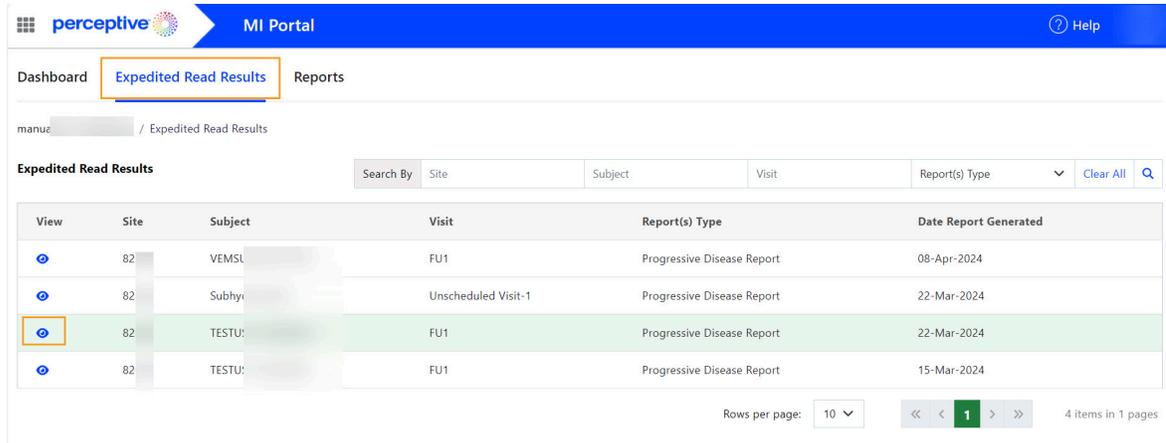
To view Expedited Read Results at MI Portal:

1. Login to the MI Portal.
2. From the Dashboard page, click a **Study ID**.

The screenshot shows the MI Portal dashboard. On the left is an 'Applications List' with 'CSM Portal - for access to Site Services'. The main area is the 'Study List' table. At the top of the table is a dropdown for 'All Sponsors' and a search box 'Search for a study'. The table has four columns: 'Sponsor', 'Program', 'Study Name', and 'Study ID'. The first row is highlighted in green, and its 'Study ID' cell is circled in orange. Below the table is a pagination control showing 'Rows per page: 10' and '6 items in 1 pages'.

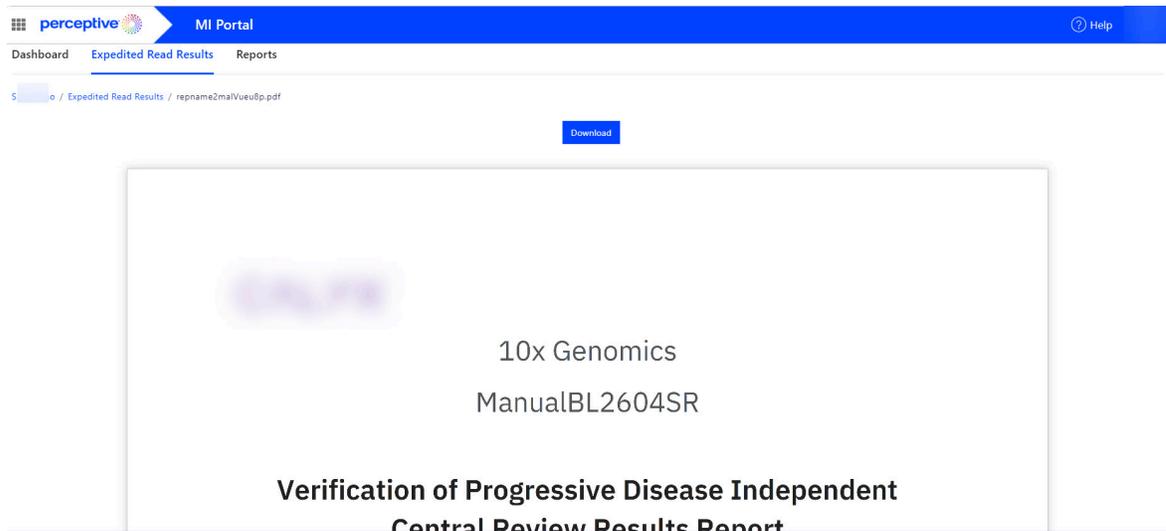
Sponsor	Program	Study Name	Study ID
nics		mg091 ?tN	il_mg0
nics			0
ciences			ility Study Demo - DO NOT DELETE
nics			8
nics	Test Programme	estStudy	0
a		01	n1

3. Click **Expedited Read Results** tab.
4. Click **View** icon against the desired **Site ID** to view the detailed report.



A reports pdf opens.

5. Scroll to **View** or click **Download** to save the report as required.



### Expedited Read Results attributes

Name	Value	Description
Site	[Read-only]	Unique Site identifier.
View	[Read-only]	Opens the pdf result report in new window.
Subject	[Read-only]	Unique Subject identifier.
Visit	[Read-only]	Unique Visit identifier.
Reports Type	[Read-only]	There are two types of report:

Name	Value	Description
		<ul style="list-style-type: none"> <li>• Progressive Disease Report: Progressive Disease Report is a result from the independent central imaging review for Visits where verification of Progressive Disease was requested.</li> <li>• Eligibility Report: Eligibility Report is a result of the independent central imaging review for Visits used to determine a subjects' inclusion in a trial.</li> </ul>
Date Report Generated	[Read-only]	The date of report generation.

## Reports

Study-level reports are available to end users via the MI Portal. The reports and visualizations provide information on the operational processing of Medical Imaging data for a particular clinical trial study.

### View Reports

Depending on the study platform whether it is Gen 1 or Gen 2, you can view different types of reports in the Reports section.

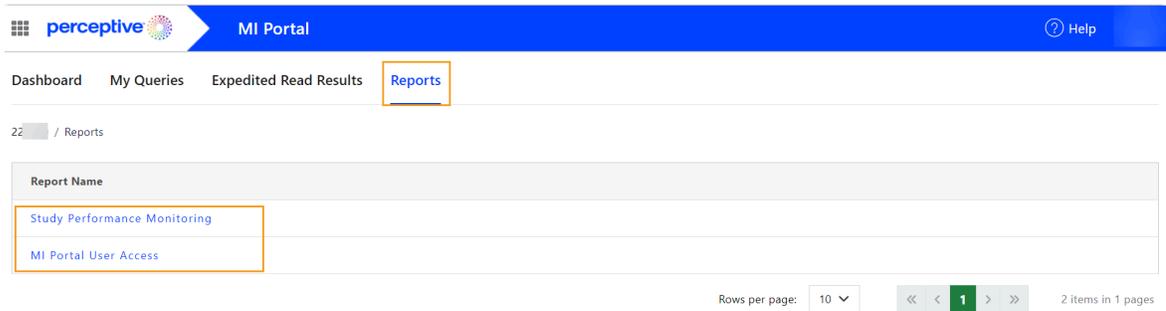
### View Gen 1 Studies Reports

For studies belonging to the Gen 1 platform, you can view the below report:

1. Study Performance Monitoring
  - Image QC Monitor
  - Read Monitor
  - Sites
  - Subjects
  - Visits
  - Images
  - Queries
2. MI Portal User Access

To view Reports related to Gen 1 **Studies**:

1. From the Study List, select a Study. The Reports tab opens.



2. Click the report name: Study Performance Monitoring.

The Reports page displays. This page contains seven sections having various metrics and graphical charts with buttons to drill down to tabular Reports of the underlying data.

3. Click each tab to view the different Reports.



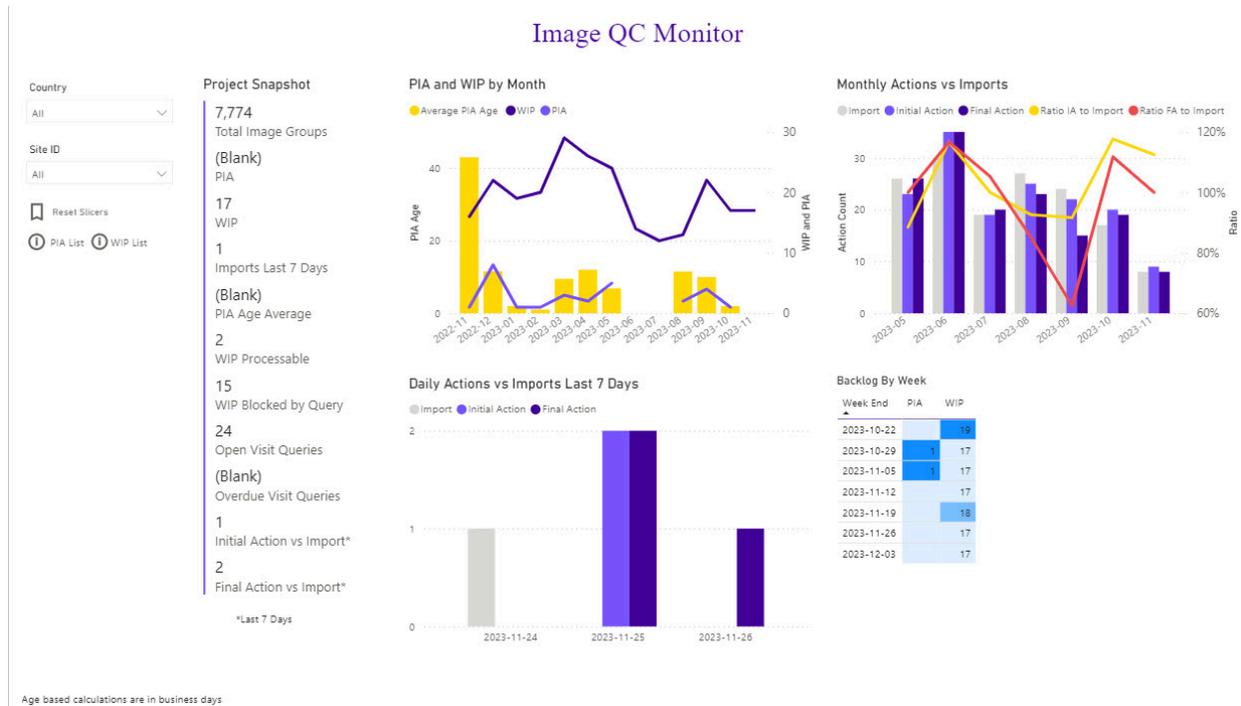
## Study Performance Monitoring

### Image QC Monitor

This tab provides an overview of the high-level metrics associated with image quality checks (QC) processing. Image QC Monitor section displays:

- Project Snapshot: a set of summary metrics for the Study. The description of each metric is as follows:
  - Total Image Groups: total count of image groups received, where image group is defined as unique Modalities per visit.
  - PIA: count of Pending Initial Action image groups, meaning at least one image in the image group has had no action taken on it yet. PIA is a subset of WIP.
  - WIP: count of image groups Work In Progress, meaning at least one image in the image group has not had QC completed.
  - Imports Last 7 Days: count of image groups imported in the last 7 calendar days.
  - PIA Age Average: Average age of image groups Pending Initial Action in business days from date received to date report is viewed.
  - WIP Processable: count of image groups that do not have any queries blocking processing.
  - WIP Blocked by Query: the count of image groups that are blocked for processing by an unresolved query.
  - Open Visit Queries: the count of unresolved visit queries.
  - Overdue Visit Queries: the count of unresolved required scan missing visit queries.
  - Initial Action vs Import: shows the rate of change to PIA in the last 7 days by taking the difference between the number of initial actions performed and imports.
  - Final Action vs Import: shows the rate of change to WIP in the last 7 days by taking the difference between the number of final actions performed and imports.
- PIA and WIP by Month: graph by month displays the count of image groups in Pending Initial Action and Work In Progress status, and the average age of image groups Pending Initial Action in business days.
- Monthly Actions vs Imports: graph by month displays the count of image groups imported, image groups with Initial Action performed, and image groups with Final Action performed, with lines showing the ratio of Initial Action to Import and Final Action to Import to help gauge rate of change to the study backlog.
- Daily Actions vs Imports Last 7 Days: graph displays the counts of image groups imported, image groups with Initial Action performed, and image groups with Final Action performed. Note that if this chart is not displayed, there were no actions taken in the last 7 days.
- Backlog By Week: displays a snapshot of image groups in Pending Initial Action and Work In Progress by week. A heat map color gradient calls attention to weeks with highest counts (darker color).

To view the Images in the QC backlog, click the PIA List button below the Slicers on the left to view Images Pending Initial Action or WIP List button to view Images that are Work In Progress. To return to the Image QC Monitor tab from the PIA List or WIP List, click the Back to Report button above the Slicers in the upper left.



## Read Monitor

The Read Monitor tab provides an overview of the number and status of available cases. The Read Monitor section display the following data:

- Pending Cases by Date Category: displays the count and average age in business days of pending cases by Month, Work Week, or Day, with date category with the selectable buttons next to the visual.
- Case Actions by Date Category: displays the count of cases assigned and completed by Month, work Week, or Day, with date category selectable with the same buttons next to Pending Cases by Date Category visual.
- Project Summary: displays case metrics for the project (study). This view is selectable by clicking the Project Summary button left of the visual.
  - Cases Created: total cases created to date.
  - Cases Completed: total cases completed to date.
  - Cases Incomplete: total cases incomplete to date, inclusive of pending and unassigned cases.
  - Pending Cases: total cases that have been assigned to a reviewer but not completed.
  - Average Pending Case Age: average age of pending cases in business days between date assigned and date report viewed.
  - Pending Cases > 5 Days: count of pending cases that have aged more than 5 business days.
  - Pending Cases > 10 Days: count of pending cases that have aged more than 10 business days.
  - Completed Cases Current Month: count of cases completed in the current month.

- Completed Cases Last Month: count of cases completed in the prior month.
- Completed Cases Last 6 Months: count of cases completed in the prior 6 months (excludes current month).
- Reviewer Summary: Displays case metrics by anonymized Reviewer. This view is selectable by clicking the Reviewer Summary button left of the visual.
  - Pending Cases: total cases that have been assigned to a reviewer but not completed.
  - Average Pending Case Age: average age of pending cases in business days between date assigned and date report viewed.
  - Pending Cases > 5 Days: count of pending cases that have aged more than 5 business days.
  - Pending Cases > 10 Days: count of pending cases that have aged more than 10 business days.
  - Completed Cases Current Month: count of cases completed in the current month.
  - Completed Cases Last Month: count of cases completed in the prior month.
  - Completed Cases Last 6 Months: count of cases completed in the prior 6 months (excludes current month).

To view the full list of cases, click the Case List button below the Slicers on the left. To return to the Read Monitor tab from the Case List, click the Back to Report button above the Slicers in the upper left.

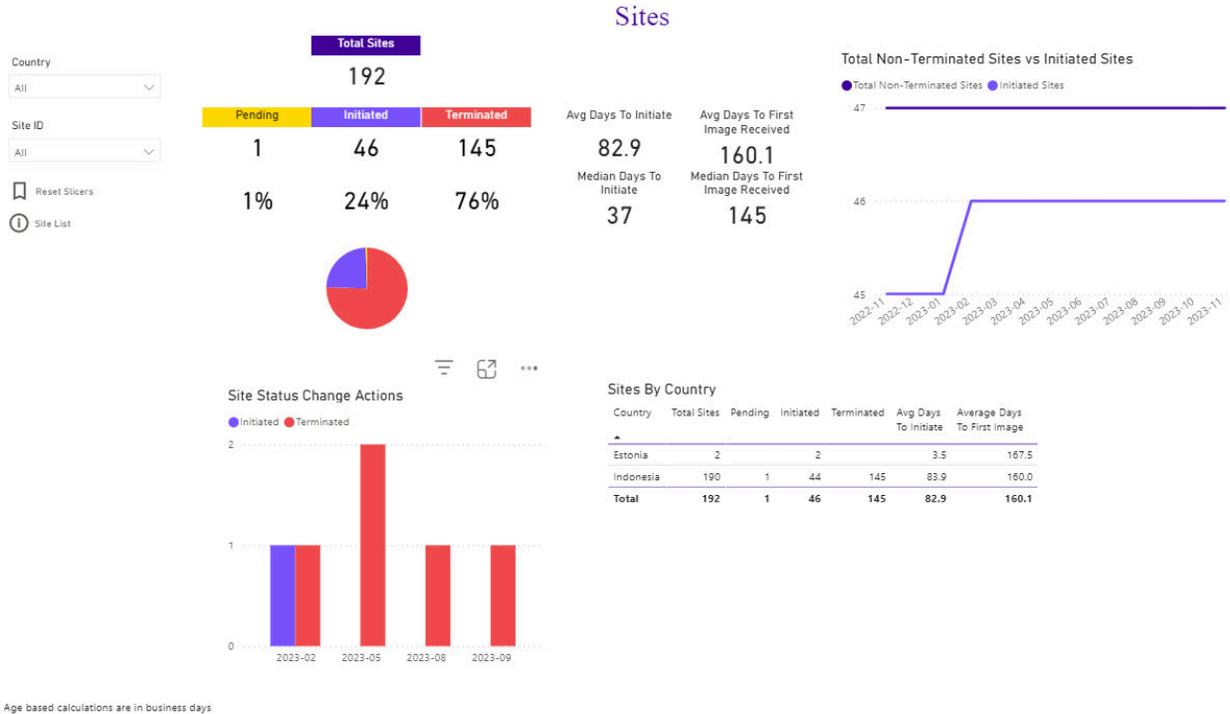


## Sites

The Sites tab provides an overview of the Site initiation process. The Sites section displays the following data:

- Total Sites: count of all Sites in the Study to date.
- Pending Sites: count and percent of total Sites that are pending initiation to date.
- Initiated Sites: count and percent of total Sites that have been initiated to date.
- Terminated Sites: count and percent of total Sites that have been terminated to date.
- Avg Days to Initiate: Average business days from Site identification to initiation.
- Median Days to Initiate: Median business days from Site identification to initiation.
- Avg Days to First Image Received: Average business days from Site initiation to first Designated for Review (DFR) image received by the Site.
- Median Days to First Image Received: Median business days from Site initiation to first Designated for Review (DFR) image received by the Site.
- Total Non-Terminated Sites vs Initiated Sites: displays counts of non-terminated Sites and initiated Sites per month for the last 12 months.
- Site Status Change Actions: displays counts of initiated and terminated Sites per month for the last 12 months.
- Sites by Country: displays the following metrics by Site country:
  - Total Sites count to date.
  - Pending sites count to date.
  - Initiated sites count to date.
  - Terminated count sites to date.
  - Avg Days to Initiate: Average business days from Site identification to initiation.
  - Avg Days to First Image: Average business days from Site initiation to first Designated for Review (DFR) image received by the Site.

To view the full list of Sites, click the Site List button below the Slicers on the left. To return to the Sites tab from the Site List, click the Back to Report button above the Slicers in the upper left.



## Subjects

The Subjects tab shows a breakdown of subject status and provides a quick look at how the processing for Images is going at a subject level.

Subjects section displays:

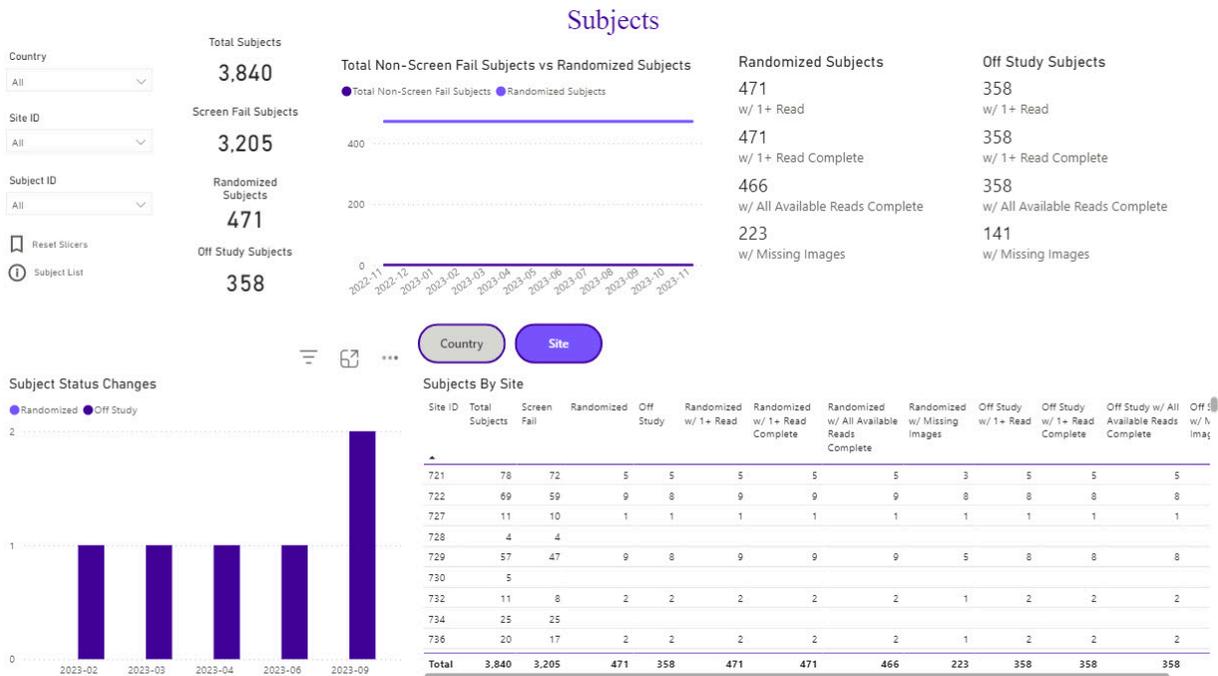
- Total Subjects: count to date.
- Screen Fail Subjects: count to date.
- Randomized Subjects: count to date.
- Off Study Subjects: count to date.
- Randomized Subjects and Off Study Subjects counts with the following segmentation:
  - With 1+ Read: one or more reviewer cases associated with the subject.
  - With 1+ Read Complete: one or more of the reviewer cases associated with the subject have been completed.
  - With All Available Reads Complete: all reviewer cases associated to the subject to date have been read (subject would be removed from this segment if additional incomplete cases are associated to the subject).
  - With Missing Images: Subjects with at least one visit where all Images are missing.
- Subject Status Changes: displays the counts of Randomized and off Study subjects by month for the last 12 months

- Subjects by Country and Site: two tables with ability to toggle the grouping using buttons above the visual.

Both tables contain the following metrics as counts to date with the same definitions outlined above:

- Total Subjects
- Screen Fail
- Randomized
- Off Study
- Randomized w/ 1+ Read
- Randomized w/ 1+ Read Complete
- Randomized w/ All Available Reads Complete
- Randomized w/ Missing Images
- Off Study w/ 1+ Read
- Off Study w/ 1+ Read Complete
- Off Study w/ All Available Reads Complete
- Off Study w/ Missing Images

To view the full list of Subjects, click the Subject List button below the Slicers on the left. To return to the Subjects tab from the Subject List, click the Back to Report icon above the Slicers in the upper left.



## Visits

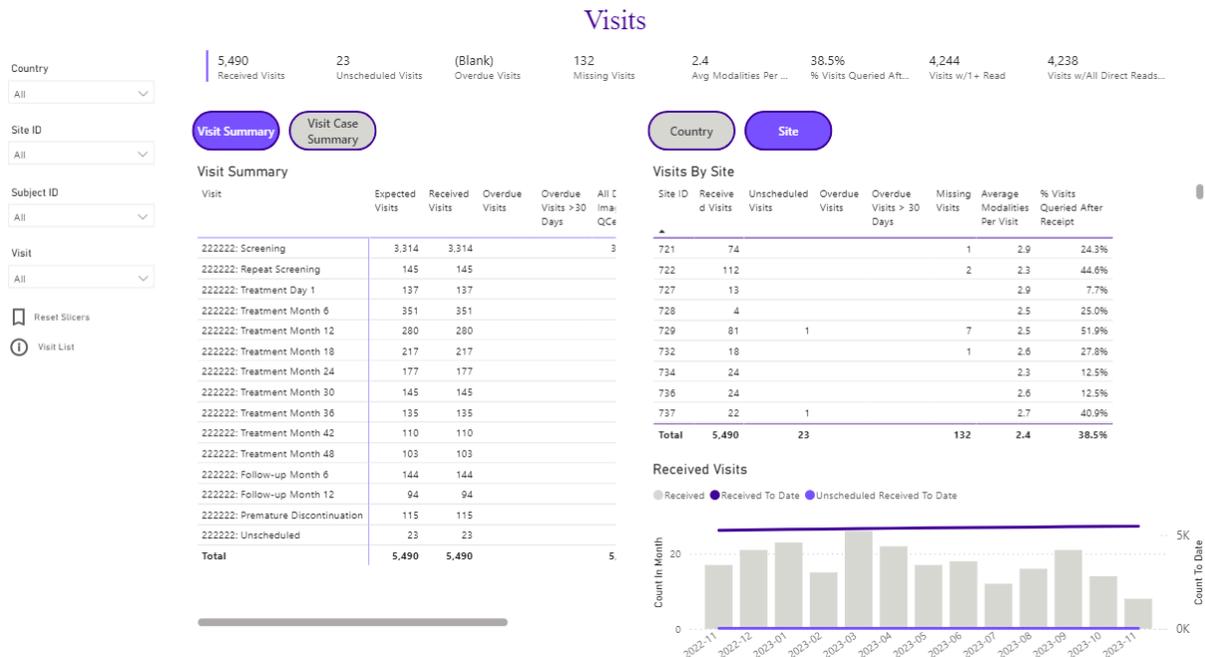
The Visits tab provides a high-level look at Visits that have been received and how many of them have made it through the QC process.

The Visits section display the following data:

- A banner of summary metrics:
  - Received Visits: count of Visits received to date.
  - Unscheduled Visits: count of unscheduled Visits received to date.
  - Overdue Visits: count of unresolved required scan missing Queries.
  - Missing Visits: count of Visits where site has confirmed we are not expected to receive any imaging.
  - Avg Modalities Per visit: average number of Modalities imaged per visit.
  - % Visits Queried After Receipt: percentage of total Visits that have had a Query issued after the image was received
  - Visits w/ 1+ Read: count of Visits where at least one reviewer case associated with the visit has been completed.
  - Visits w/ All Direct Reads Complete: count of Visits where all reviewer cases associated to the visit are completed.
- Visit Summary: displays a table of the following metrics by visit
  - Expected Visits: count of Visits received + count of unresolved overdue visit Queries.
  - Received Visits: count of Visits received to date.
  - Overdue Visits: count of unresolved required scan missing Queries.
  - Overdue Visits > 30 days: count of unresolved required scan missing Queries that have been open for more than 30 calendar days.
  - All DFR Images QCed: count of Visits where all Designated for Review (DFR) Images received have had QC completed.
  - All Direct Cases Complete: count of Visits where all reader cases associated to the visit have been completed.
- Visit Case Summary: displays a table of the following reader case metrics by visit:
  - Cases: count of total reader cases created for the visit
  - Completed: count of reader cases created for the visit that are completed
  - Assigned: count of reader cases created for the visit that are assigned to a reader, inclusive of completed cases
  - Unassigned Not Blocked by Case Rule: count of cases that have not been assigned to a reader that are ready for assignment.
  - Unassigned Cases Blocked by Case Rule: count of cases that cannot be assigned to a reader due to one or more operational checks preventing assignment.
- Visits By Country and Visits by Site: table displays the following visit metrics grouped by Country or Site, selectable using the buttons above the visual:
  - Received Visits: count of Visits received to date.
  - Unscheduled Visits: count of unscheduled Visits received to date.
  - Overdue Visits: count of unresolved required scan missing Queries.

- Missing Visits: count of Visits where Site has confirmed we are not expected to receive any imaging.
- Avg Modalities Per visit: average number of Modalities imaged per visit.
- % Visits Queried After Receipt: percentage of Visits that have had a Query issued after the image was received.
- Received Visits: displays the count of Visits total Visits received within a month, total Visits received to date, and unscheduled Visits received to date, for the last 12 months.

To view the full list of Visits, click the Visit List button below the Slicers on the left. To return to the Visits tab from the Visit List, click the Back to Report icon above the Slicers in the upper left



## Images

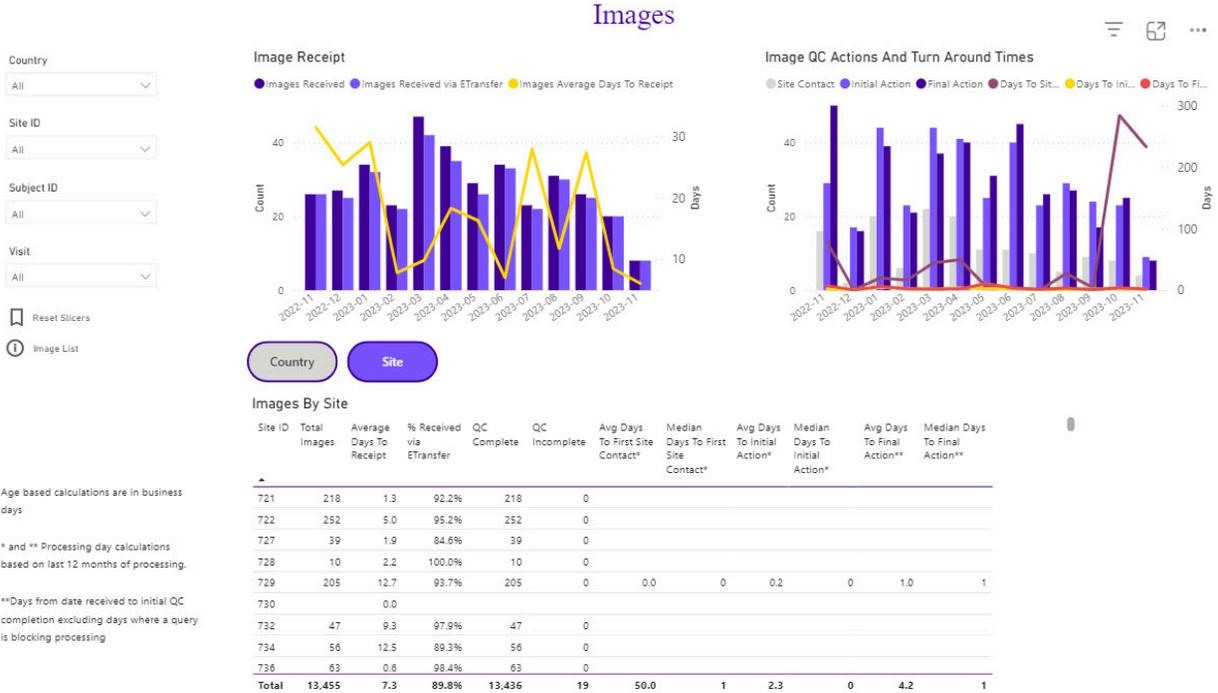
The Images tab provides an overview of Images received for the Study and metrics for Image Processing . The Images section displays the following data:

- Image Receipt: displays count of Images received, Images received via ETransfer, and average business days from exam date to image received date by month for the last 12 months.
- Image QC Actions And Turn Around Times: displays counts and days to action for QC actions:

- Site Contact: count site notification, and average business days from image receipt to site notification, where Site notification is image acceptance or image quality-related Query.
- Initial Action: count of Images where QC actions were started, and average business days from image receipt to QC action started.
- Final Action: count of Images where QC actions were completed, and average business days from image receipt to QC action completed.
- Images By Country and Images By Site: table displays the following image metrics grouped by Country or Site, selectable using the buttons above the visual:
  - Total Images: count of Images received to date.
  - Average Days To Receipt: average business days between exam date and received date.
  - % Received via ETransfer: percentage of total Images received via ETransfer.
  - QC Complete: count of Images received to date that have completed QC.
  - QC Incomplete: count of Images received to date that have not completed QC.
  - Avg Days To First Site Contact\*: average business days from image receipt to Site notification, where Site notification is image acceptance or image quality-related Query.
  - Median Days To First Site Contact\*: median business days from image receipt to Site notification, where Site notification is image acceptance or image quality-related Query.
  - Avg Days To Initial Action\*: average business days from image receipt to QC action started.
  - Median Days To Initial Action\*: median business days from image receipt to QC action started.
  - Avg Days To Final Action\*\*: average business days from image received to QC completion.
  - Median Days To Final Action\*\*: median business days from image received to QC completion.

Metrics marked with single and double asterisk are calculated based on last 12 months of QC processing actions only. Metrics marked with double asterisk exclude days where an open Query blocked image processing.

To view the full list of Images, click the Image List icon below the Slicers on the left. To return to the Images tab from the Image List, click the Back to Report button above the Slicers in the upper left.



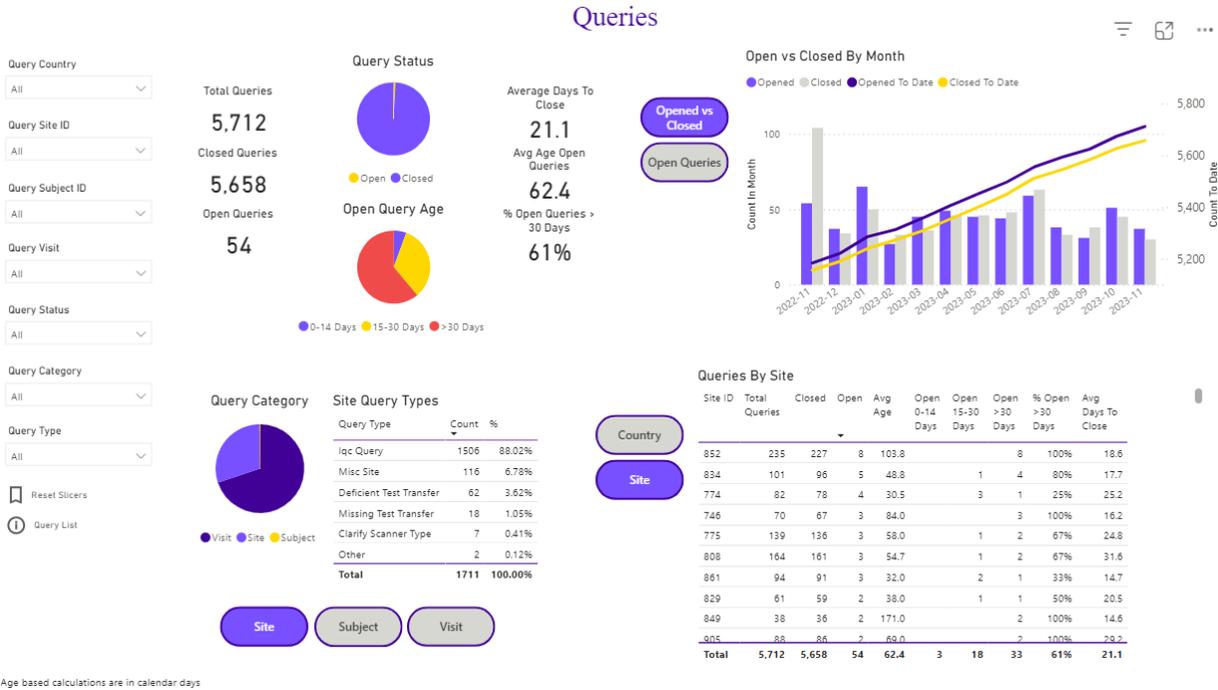
## Queries

The Queries tab provides overview metrics and trends for all Queries for the Study. The Queries section displays the following data:

- Total Queries: count of Queries opened for Study to date.
- Closed Queries: count of resolved and closed Queries for Study to date.
- Open Queries: count of unresolved Queries for Study to date.
- Average Days To Close: average days in calendar days from date Query opened to date Query resolved.
- Avg Age Open Queries: average age in calendar days for unresolved Queries from date Query opened to date report viewed.
- % Open Queries > 30 Days: percentage of total unresolved Queries that were opened greater than 30 days before the date report viewed.
- Query status: displays pie chart of open and closed Query counts to date.
- Open Query Age: displays pie chart of unresolved Query counts in segments of 0 to 14 calendar days, 15 to 30 calendar days, and greater than 30 calendar days since Query was opened.
- Open vs Closed By Month: displays counts of opened and closed Queries to date by month and counts of opened and closed Queries in each month, for the last 12 months. This visual is selectable with a button to the left of the visual.

- Open Queries: displays count of open Queries, count of Queries open for greater than 30 calendar days, and average age of open Queries in calendar days by month for the last 12 months. This visual is selectable with a button to the left of the visual.
- Query Category: displays a pie chart of Query counts by Query Category; visit, Site, and Subject Queries.
- Site, Subject, and visit Query Types: displays a table of Query counts and percentages by Query type for each Query Category; visit, Site, and Subject Queries. The Query Category is selectable with buttons below the visual.
- Queries by Country and Queries by Site: table displays the following Query metrics grouped by Country or Site, selectable using the buttons above the visual:
  - Total Queries: count of Queries opened to date.
  - Closed: count of resolved and closed Queries to date.
  - Open: count of unresolved Queries to date.
  - Avg Age: average age in calendar days
  - Open 0-14 Days: count of unresolved Queries that have been open between 0 and 14 calendar days as of date report viewed.
  - Open 15-30 Days: count of unresolved Queries that have been open between 15 and 30 calendar days as of date report viewed.
  - Open >30 Days: count of unresolved Queries that have been open greater than 30 calendar days as of date report viewed.
  - % Open >30 Days: percentage of total unresolved Queries that were opened greater than 30 calendar days before the date report viewed.
  - Avg Days To Close: average calendar days between date Query opened and date Query resolved.

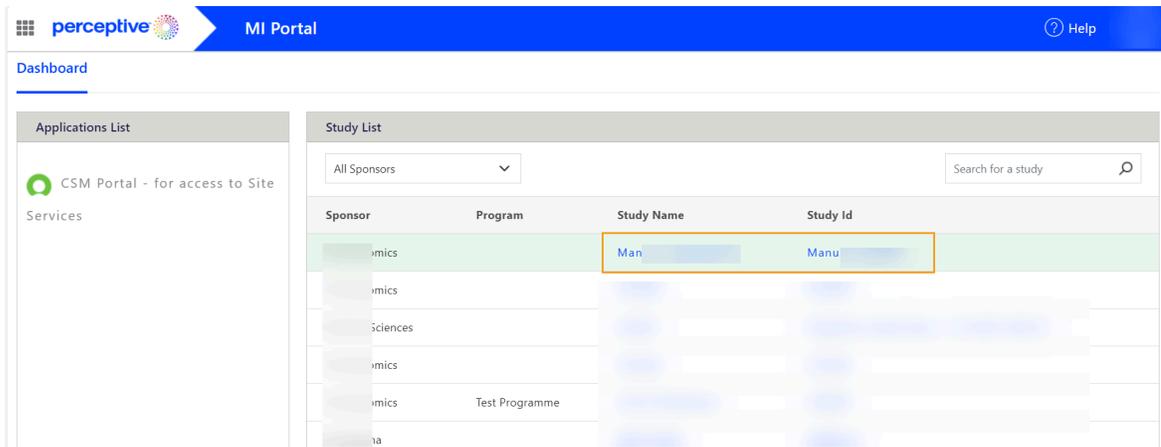
To view the full list of Queries, click the Query List icon below the Slicers on the left. To return to the Queries tab from the Query List, click the Back to Report button above the Slicers in the upper left.



## MI Portal User Access

To access this functionality in MI Portal:

1. Login to the MI Portal.
2. Click on a **Study Name** or **Study ID**.



3. Click on Reports tab.
4. Click MI Portal User Access.



Name	Value	Description
Last Name	[Read-only]	Last Name of the User
Email Address	[Read-only]	Unique Email Address of the User
User Role	[Read-only]	Role of the User in MI Portal
Site Number	[Read-only]	Unique Site Identifier
Study Association Date	[Read-only]	Date when the User is added to the Study/Trial
Study De-association Date	[Read-only]	Date when the User is removed from the Study/Trial
Last Accessed Date	[Read-only]	Date when the User last accessed the Study/Trial on MI Portal Dashboard

## View Gen 2 Studies Reports

For studies belonging to Gen 2 platform, below reports will be available:

1. Status of Visits
2. All Queries
3. Breakdown Report
4. Status of Sites
5. Expedited Read Results
6. Ambra User Status Report
7. MI Portal User Access

To view Reports related to Gen 2 **Studies**:

1. Login to the MI Portal.
2. From the Dashboard page, click a **Study ID**.

The screenshot shows the MI Portal Dashboard. On the left is the 'Applications List' sidebar with 'CSM Portal - for access to Site Services'. The main area is the 'Study List' table. At the top of the table is a dropdown for 'All Sponsors' and a search box 'Search for a study'. The table has columns: Sponsor, Program, Study Name, and Study Id. The third row is highlighted in green and has a red box around it, containing 'Sciences', 'L...DM1', and 'ligibility Stu'. The bottom of the table shows 'Rows per page: 10' and a pagination control with '1' selected, indicating '6 items in 1 pages'.

Sponsor	Program	Study Name	Study Id
omics		mg0906PtN	al_mg0906
omics			0
Sciences		L...DM1	ligibility Stu
omics		8	2 8
omics	Test Programme	2TestStudy	2 0
na		01001	len1

3. Click **Reports** tab.

4. Click a **Report Name** as required to view.

The screenshot shows the MI Portal Reports page. The 'Reports' tab is selected in the top navigation bar. Below the navigation bar, there is a breadcrumb 'manual / Reports'. A list of report names is displayed in a table-like format. At the bottom, there is a pagination control showing 'Rows per page: 10' and '7 items in 1 pages'.

Report Name
<a href="#">All Queries</a>
<a href="#">Status of Sites</a>
<a href="#">Status of Visits</a>
<a href="#">Breakdown Report</a>
<a href="#">Expedited Read Results</a>
<a href="#">Ambr User Status Report</a>
<a href="#">MI Portal User Access</a>

## Status of Visits

List of visits with details used from the Image Collect stage to the Image Assessment stage. Useful for all, particularly the Case Management team in looking at 'How many Visits/ Reads are impacted by query holdups' Also useful during the Data Management/ Reconciliation stage.

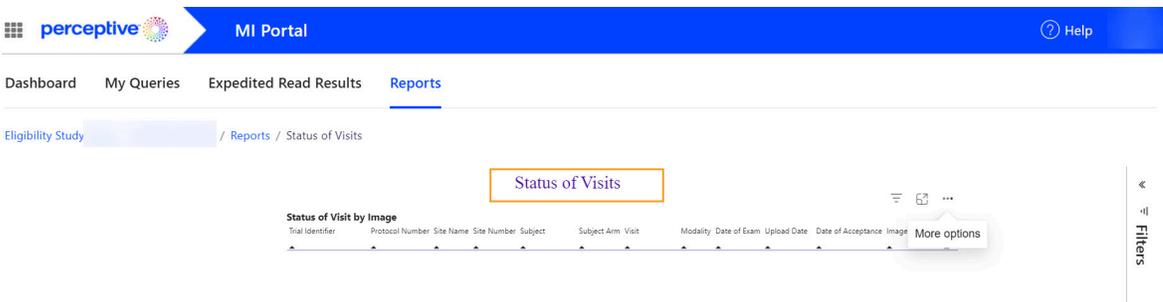
To view the **Status of Visits**:

1. From the Reports tab, click **Status of Visits**.



**Fastpath:**  
A list of Status of Visits with related attributes appears.

2. View or Export the **Status of Visits** report by clicking on the three dots.



3. **Status of Visits** Attributes

Name	Value	Description
Trial Identifier	[Read-only]	Unique Trial identifier.
TIMS	[Read-only]	Unique TIMS code
Site Name	[Read-only]	Unique Site Name
Site Number	[Read-only]	Unique Site number
Subject	[Read-only]	A person taking part in a study
Subject Arm	[Read-only]	
Visit	[Read-only]	Visit of a subject to the site for examination purposes
Modality	[Read-only]	The medium of test performed

Name	Value	Description
Date of Exam	[Read-only]	The date when test was performed
Upload date	[Read-only]	The date when image was uploaded to Ambra
Date of Acceptance	[Read-only]	The date of image acceptance
Image Status	[Read-only]	The status of image acceptance
Any open queries against image	[Read-only]	Status of open queries against each image
Image ID	[Read-only]	Unique image identifier

## All Queries

List of queries with details used from the Image Collection & Quality Check stages up until the stage where a case is assigned to a reader. Also used in the Data Management stage i.e. Queries might be issued during Data Reconciliation.

To view the All Queries report:

1. From the Reports tab, click **All Queries**.

The screenshot shows the MI Portal interface. At the top, there is a navigation bar with the 'perceptive' logo and 'MI Portal' text. Below the navigation bar, there are tabs for 'Dashboard', 'Expedited Read Results', and 'Reports'. The 'Reports' tab is active and highlighted. Underneath, there is a breadcrumb trail 'manual / Reports'. A list of reports is displayed, with 'All Queries' highlighted in blue. Other reports listed include 'Status of Sites', 'Status of Visits', 'Breakdown Report', 'Expedited Read Results', 'Ambra User Status Report', and 'MI Portal User Access'. At the bottom right of the list, there is a pagination control showing 'Rows per page: 10' and '7 items in 1 pages'.



### Fastpath:

A list of All Queries with related attributes appears.

2. View or Export the **All Queries** report by clicking on the three dots.

The screenshot shows the 'MI Portal' interface with a navigation bar containing 'perceptive' logo, 'MI Portal', and a 'Help' icon. Below the navigation bar are tabs for 'Dashboard', 'My Queries', 'Expedited Read Results', and 'Reports'. The 'Reports' tab is active, and a breadcrumb trail shows 'Eligibility Study / Reports / All Queries'. A button labeled 'All Queries' is highlighted with an orange box. Below this is a table titled 'Query Details by Query' with columns: Trial Identifier, Protocol Number, Query ID, Site Name, Site Number, Subject, Visit, Modality, Expedited Visit, Date of Exam, Upload Date, and Query Status. The table contains 12 rows of data, each representing a different query with its associated identifiers and status.

### 3. All Queries Attributes

Name	Value	Description
Query details by query <ul style="list-style-type: none"> <li>◦ Trial Identifier</li> <li>◦ TIMS</li> </ul>	[Read-only]	Unique query identifier.
Query ID	[Read-only]	Unique query identifier.
Site Name	[Read-only]	Unique Site identifier.
Site Number	[Read-only]	Unique Subject identifier.
Subject	[Read-only]	Subject is a patient to visits to the site
Visit	[Read-only]	Subject visit to the site to monitor disease progression
Modality	[Read-only]	Imaging Type
Expedited Visit	[Read-only]	Visits treated on fast-track mode with additional agreed upon charges
Date of Exam	[Read-only]	The date when test was performed
Upload date	[Read-only]	The date when image was uploaded to Ambra
Query status	[Read-only]	Status of query
Query Type	[Read-only]	Type of query
Query Text	[Read-only]	Body part of query

Name	Value	Description
Last Action Date	[Read-only]	Latest activity date
Last Action Comment	[Read-only]	Latest activity message
Query Created Date	[Read-only]	The date of query creation
Query Resolved Date	[Read-only]	The date of query resolution
Query Closed Date	[Read-only]	The date when query was closed
Opened By	[Read-only]	Name of the person who opened the query
Resolved By	[Read-only]	Name of the person who resolved the query
Turnaround Time from Query Created to Query Resolved (in Business Days)	[Read-only]	Total time from query creation to resolution days
Days Since Original Query Sent (in Calendar Days)	[Read-only]	The day when original query was posted
Image ID	[Read-only]	Unique image identifier.

## Breakdown Report

List of Images for a study with high-level details of sites, visits, and queries against each. Used throughout the entire study as a starting point for an overview of data associated with each image.

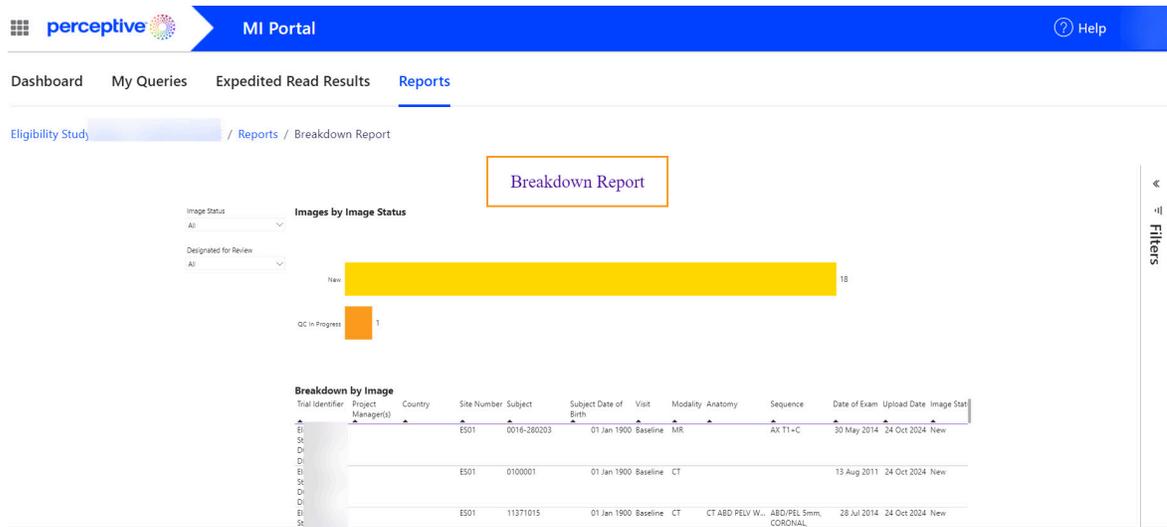
To view the Breakdown Report:

1. From the Reports tab, click **Breakdown Report**.

The screenshot shows the MI Portal interface. At the top, there is a blue header with the 'perceptive' logo and 'MI Portal' text. Below the header, there are navigation tabs: 'Dashboard', 'Expedited Read Results', and 'Reports'. The 'Reports' tab is active and highlighted with an orange box. Underneath, there is a breadcrumb trail: 'manual: / Reports'. A list of report names is displayed, with 'Breakdown Report' highlighted by an orange box. Other reports in the list include 'All Queries', 'Status of Sites', 'Status of Visits', 'Expedited Read Results', 'Ambrs User Status Report', and 'MI Portal User Access'. At the bottom right, there is a pagination control showing 'Rows per page: 10' and '7 items in 1 pages'.

**Fastpath:**  
A list of Breakdown Report with related attributes appears.

2. View or Export the **Breakdown Report** by clicking on the three dots.



3. Breakdown Report Attributes

Name	Value	Description
Trial Identifier	[Read-only]	Unique Trial identifier.
project manager	[Read-only]	A Project Managers (PMs) responsible for managing a project
Country	[Read-only]	Unique Country identifier
Site Number	[Read-only]	Unique Site number
Subject	[Read-only]	A human participating in clinical trial or Study
Subject date of birth	[Read-only]	Date of birth of a human participating in a Study
Visit	[Read-only]	Visit of a subject to site for the examination purposes
Modality	[Read-only]	Imaging Type
Anatomy	[Read-only]	Body parts
Sequence	[Read-only]	Order of the test performed
Date of Exam	[Read-only]	Date of examination

Name	Value	Description
Upload date	[Read-only]	Date of image upload to Ambra
Image Status	[Read-only]	Status of image
Date of QC complete	[Read-only]	Date of quality check completion
Acceptance	[Read-only]	Image acceptance status
Date of Acceptance	[Read-only]	Date of Image acceptance
Designated for Review (DFR)	[Read-only]	A person authorized to perform the image review
Any Open Query against Image	[Read-only]	Open queries against the image
Query Type(s) of Open Queries	[Read-only]	Type of query
Image ID	[Read-only]	Unique image identifier.

## Status of Sites

List of sites with details used throughout the entire study; at Site Qualification, at Registration of Sites/ Subjects, and during the Image Processing stage.

To view the **Status of Sites**:

1. From the Reports tab, click **Status of Sites**.

The screenshot shows the MI Portal interface. At the top, there is a navigation bar with the 'perceptive' logo and 'MI Portal' text. Below the navigation bar, there are tabs for 'Dashboard', 'Expedited Read Results', and 'Reports'. The 'Reports' tab is active and highlighted. Underneath, there is a breadcrumb trail: 'manual' / Reports. A list of report names is displayed, with 'Status of Sites' highlighted in a blue box. Other reports listed include 'All Queries', 'Status of Visits', 'Breakdown Report', 'Expedited Read Results', 'Ambra User Status Report', and 'MI Portal User Access'. At the bottom right of the report list, there is a pagination control showing 'Rows per page: 10' and '7 items in 1 pages'.



### Fastpath:

A list of status of Sites with related attributes appears.

2. View or Export the **Status of Sites** report by clicking on the three dots.



3. **Status of Sites** Attributes

Name	Value	Description
Trial Identifier	[Read-only]	Unique Trial identifier.
TIMS	[Read-only]	Unique TIMS code
Country	[Read-only]	Unique Country identifier
Site Name	[Read-only]	Unique Site Name
Site Number	[Read-only]	Unique Site number
Principal Investigator(s)	[Read-only]	A head member who performs investigation
Site Qualitfication status	[Read-only]	Status of site eligibility to perform the test
Date created	[Read-only]	Original date of site creation
Date Qualified	[Read-only]	The date when site was qualified
Date Terminated	[Read-only]	The date when site was terminated

## Expedited Read Results

A cumulative view of Expedited Read Results reports generated for a study for sponsor users. Includes tabs **Eligibility Cases** and **Verification of Progressive Disease (VOPD)** Cases depending on whether the study is an Eligibility Study or VOPD study or both.

To view the Expedited Read Results report:

1. From the Reports tab, click **Expedited Read Results**.



A list of Expedited Read Results with related attributes appears.

2. View the **Eligibility Cases** report.



3. Eligibility cases Attributes

Name	Value	Description
With Measurable Disease	[Read-only]	Test that indicates eligibility of a subject for clinical trial with measurable disease
Without Measurable Disease	[Read-only]	Test that indicates eligibility of a subject for clinical trial without measurable disease

4. View the **Verification of Progressive Disease (VOPD)** report.

The screenshot shows the 'Reports' section of the MI Portal. A summary card titled 'Verification of Progressive Disease Cases' displays two key metrics: '# Confirmed PD Cases' with a value of 2, and '# VOPD Requested' with a value of 4. Below this, a table titled 'VOPD Cases Detail' provides a granular view of each case, including columns for ERR Report ID, Trial Identifier, Site Number, Subject, Visit, Date ERR Report Request Received, Date Case Review Completed, Date ERR Report Generated, and Date ERR Report Provided to Site.

ERR Report ID	Trial Identifier	Site Number	Subject	Visit	Date ERR Report Request Received	Date Case Review Completed	Date ERR Report Generated	Date ERR Report Provided to Site
Assessment-Workflow-Report-1624	manualUS121890DRgn	82648	VEMSU8200302501	FL1	08 Apr 2024	08 Apr 2024	08 Apr 2024	31 May 2024
Assessment-Workflow-Report-1511	manualUS121890DRgn	82648	Subj03020621	Unscheduled Visit	28 Mar 2024	19 Mar 2024	22 Mar 2024	28 Mar 2024
Assessment-Workflow-Report-1508	manualUS121890DRgn	82648	TESTUS121890DR03	FL1	22 Mar 2024	15 Mar 2024	22 Mar 2024	31 May 2024
Assessment-Workflow-Report-1415	manualUS121890DRgn	82648	TESTUS121890DR01	FL1	15 Mar 2024	15 Mar 2024	15 Mar 2024	20 Mar 2024

5. VOPD cases Attributes

Name	Value	Description
Confirmed PD Cases	[Read-only]	Number of cases where progressive disease was confirmed
VOPD Requested	[Read-only]	Number of requests for verification of progressive disease received

## Ambra User Status Report

The Ambra User Status report shows a list of Pending and Active users of Ambra.

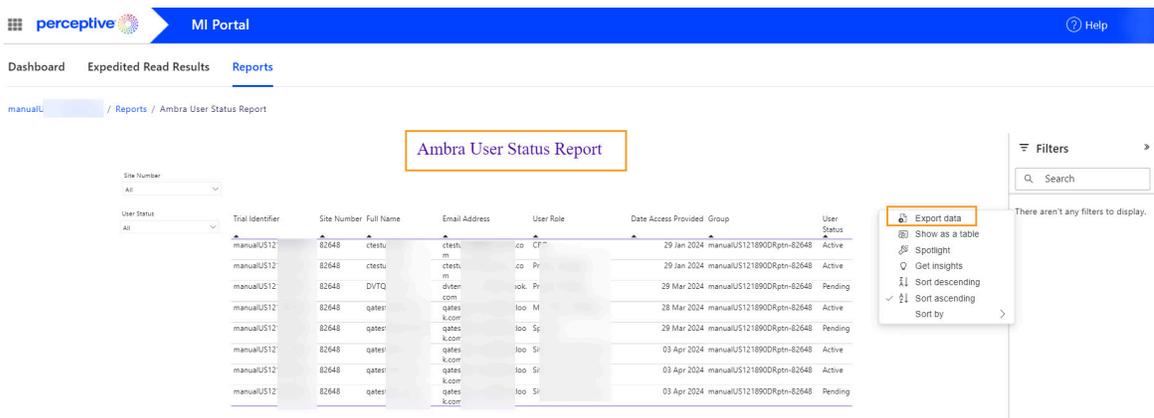
To view the **Ambra User Status Report**:

1. From the Reports tab, click **Ambra User Status Report**.

The screenshot shows the 'Reports' section of the MI Portal. A list of reports is displayed, including 'All Queries', 'Status of Sites', 'Status of Visits', 'Breakdown Report', 'Expedited Read Results', 'Ambra User Status Report', and 'MI Portal User Access'. The 'Ambra User Status Report' is highlighted with an orange box. At the bottom right, there is a pagination control showing 'Rows per page: 10' and '7 items in 1 pages'.

**Fastpath:**  
A list of Ambra User Status Report with related attributes appears.

2. View or Export the **Ambra User Status Report** by clicking on the three dots.



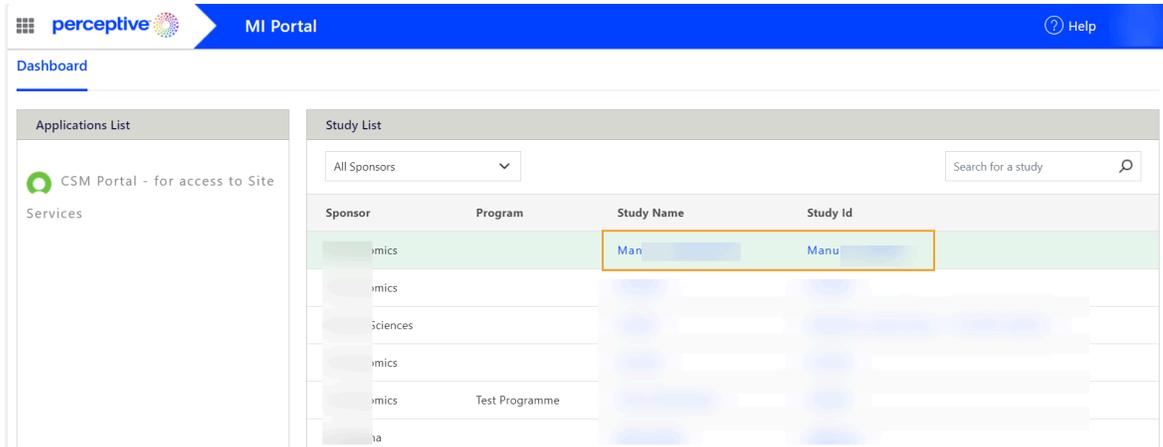
3. **Ambra User Status Report** Attributes

Name	Value	Description
Trial Identifier	[Read-only]	Unique Trial identifier.
Site Number	[Read-only]	Unique Site number
Full Name	[Read-only]	Full name of the Ambra user.
Email Address	[Read-only]	Email address of the Ambra user.
User Role	[Read-only]	User assigned role of Ambra user.
Data Access Provided Group	[Read-only]	User group who has access to data in Ambra.
User Status	[Read-only]	User status indicating user is active or inactive.

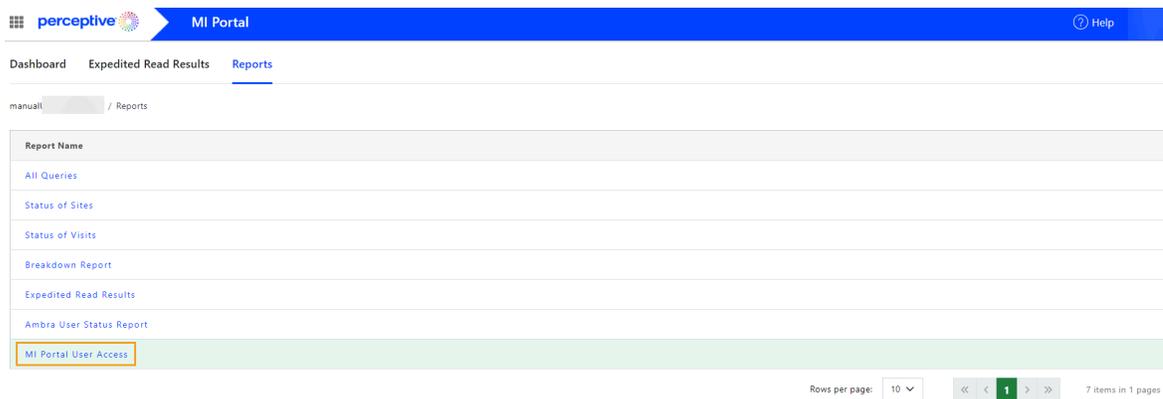
MI Portal User Access

To access this functionality in MI Portal:

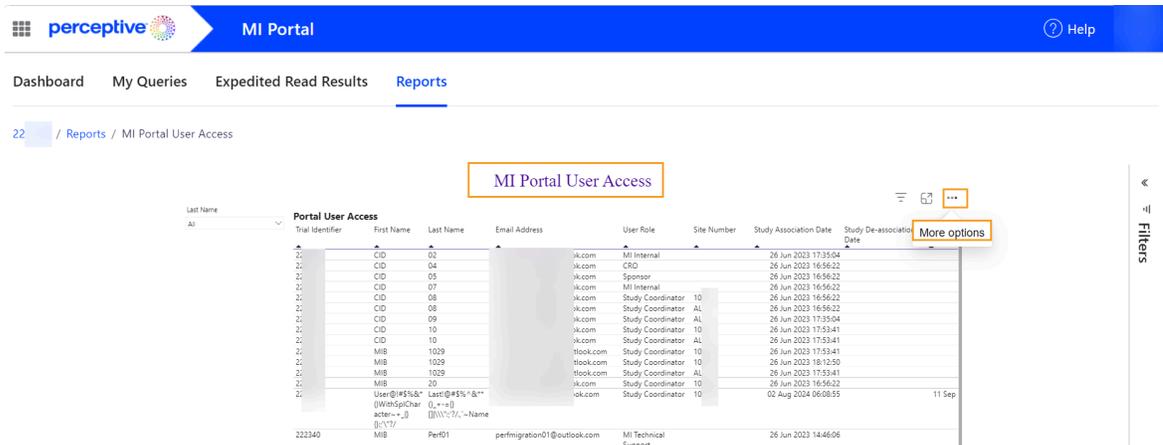
1. Login to the MI Portal.
2. Click on a **Study Name** or **Study ID**.



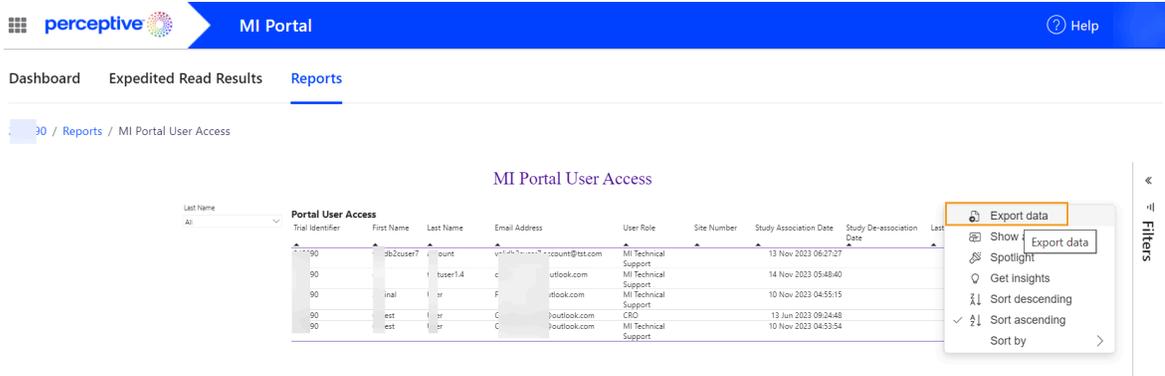
3. Click on Reports tab.
4. Click MI Portal User Access.



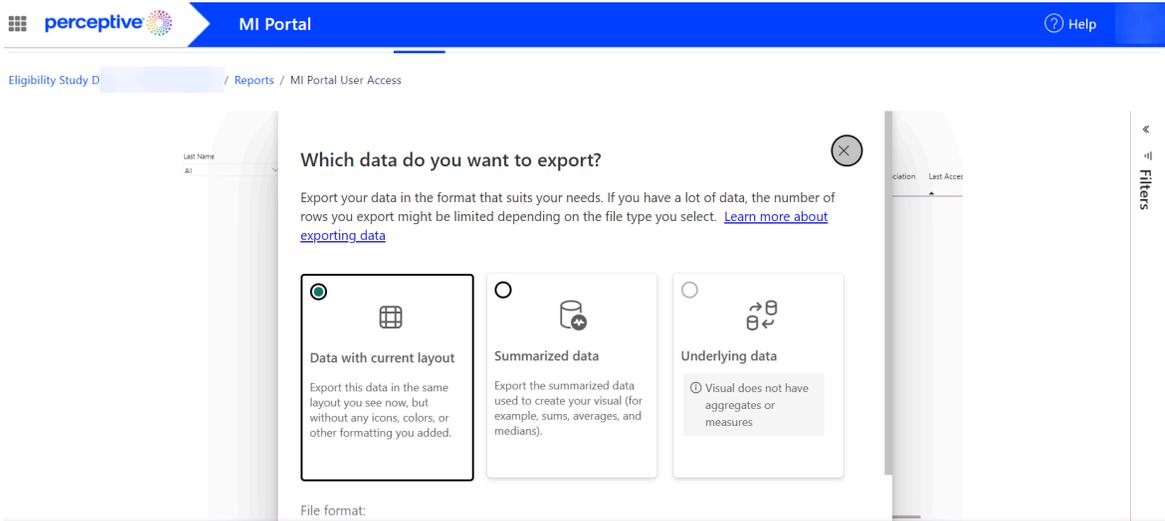
5. Hover over on the top right corner of the table to view the **More options** icon (three dots).



6. Click **Export data**.



7. Select the required file format to export the data.



8. [Optional] Sort the data in ascending or descending order to view as required.

### MI Portal User Access Reports Attributes

Name	Value	Description
Trial Identifier	[Read-only]	Unique Trial identifier
First Name	[Read-only]	First Name of the User
Last Name	[Read-only]	Last Name of the User
Email Address	[Read-only]	Unique Email Address of the User
User Role	[Read-only]	Role of the User in MI Portal
Site Number	[Read-only]	Unique Site Identifier
Study Association Date	[Read-only]	Date when the User is added to the Study/Trial

Name	Value	Description
Study De-association Date	[Read-only]	Date when the User is removed from the Study/Trial
Last Accessed Date	[Read-only]	Date when the User last accessed the Study/Trial on MI Portal Dashboard

## Interaction with Reports

Instructions to view the report data using multiple options in the user interface.

You can view the image processing data in different Reports like bar charts, pie charts, tables and graphs. There are various filters and Slicers and hover over options to view the data points by specific time lines, durations and by Site or Country and other variables.

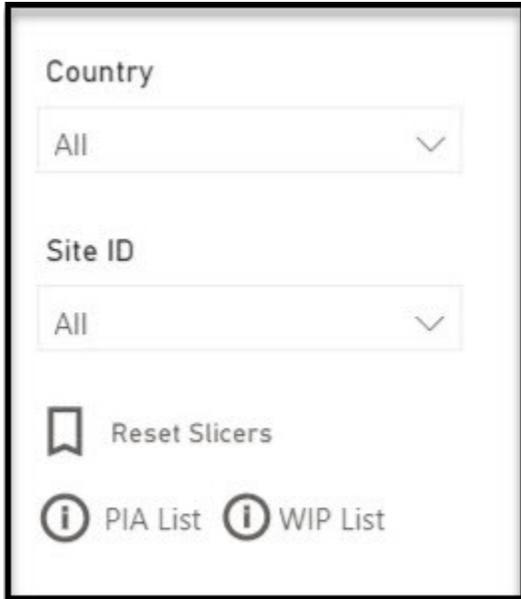
Upon selecting any report, you can find the following features depending upon the study platform:

- Summary KPIs
- Graphical trends
- Legends to explain the graphical data
- Change visuals to different aggregations
- Navigational aid
- List reports for detailed data supporting the KPIs and graphs
- Slicers (filters) enabling end-users to select subsets of data for analysis

The different options are explained below:

## Slicers for Filtering

The Slicers apply across all the tabs (except for a few Slicers that are tab-specific) and to the list Reports.



You can select the required options from the drop-down list for fields. The charts then display the corresponding data in various charts of the report. To return to the original display, click Reset Slicers.

## Lists Reports

Each tab contains links to List report below the Slicers to view the underlying data in tabular format. For example, selecting PIA List on the Image QC Monitor tab opens up a Pending Initial Action List report for the Images in this QC step, as shown below.

**PIA List**

← Back to report

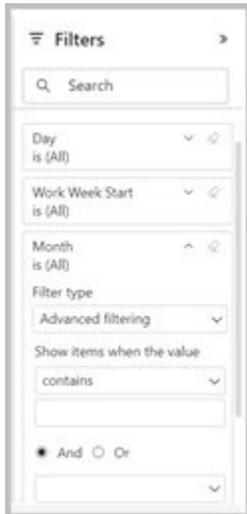
Country	Work ID	Project	Protocol	Project Manager	Site ID	Subject ID	Visit	Visit Qualifier	Modality	Exam Date	Date Received	Days Since Receipt	Active Query	Processing State
All	7654321	222345	888222233334	John II Doe	825	779015	Treatment Month 12		DXA	10-Jul-2023	10-Jul-2023	3	1	Processing.Imp
	7654321	222345	888222233334	John II Doe	729	729070	Treatment Month 42		DXA	06-Jul-2023	06-Jul-2023	5	1	Processing.Imp
	7654321	222345	888222233334	John II Doe	774	774003	Premature Discontinuation		Ultrasound (trans-vaginal)	02-Jun-2021	04-Jul-2023	7	1	Processing.Imp
	7654321	222345	888222233334	John II Doe	774	774015	Treatment Day 1		Ultrasound (trans-vaginal)	03-Jun-2020	04-Jul-2023	7	1	Processing.Imp
	7654321	222345	888222233334	John II Doe	776	776031	Treatment Month 42		DXA	17-Jun-2023	03-Jul-2023	8	1	Processing.Imp
	7654321	222345	888222233334	John II Doe	729	729070	Treatment Month 42		DXA	20-Jun-2023	29-Jun-2023	10	1	Processing.Imp
	7654321	222345	888222233334	John II Doe	774	774040	Treatment Month 36		Ultrasound (trans-vaginal)	07-Mar-2023	29-Jun-2023	10	1	Processing.Imp
	7654321	222345	888222233334	John II Doe	808	808079	Treatment Month 36		DXA	28-Jun-2023	28-Jun-2023	11	1	Processing.Imp
	7654321	222345	888222233334	John II Doe	907	907028	Treatment Month 36		DXA	21-Jun-2023	26-Jun-2023	13	1	Processing.Imp
	7654321	222345	888222233334	John II Doe	834	834018	Treatment Month 48		DXA	23-Jun-2023	23-Jun-2023	14	1	Processing.Imp

To get back to the Reports, select Back to Report in the left side of tabular List report.

## Filters and Advanced Filters

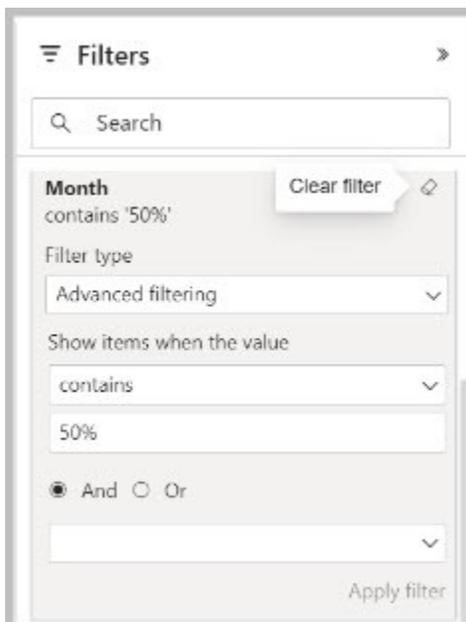
In addition to Slicers, the filter menu on the right side of the page is available to use the different types of additional filters to view specific data points.

You can select a Visual element to apply these filters, it is best to click title of the visual. You can then select the various options in the filters available to view a specific data as required.



Advanced Filtering: Certain additional filter options appear with respect to the data of the particular chart you select. You can select the Advanced Filtering options to drilled down to the required data point.

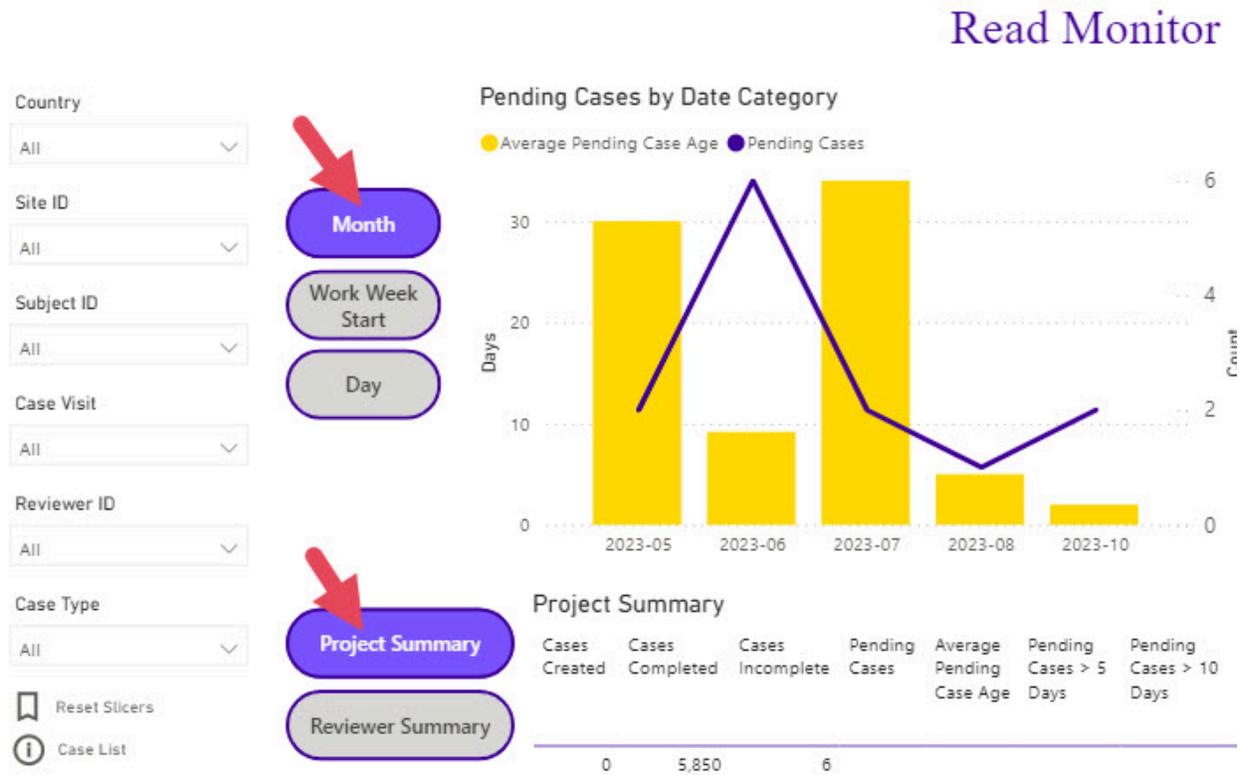
Once you apply certain filters, the filters needs to be cleared using the Clear Filter icon as shown below. Or else it will be reset the next time the Study Performance Management report is loaded.



The Reset Slicers button will not clear these filters.

## Buttons

Some charts and visuals have buttons to show different grouping of data for example: By Country, Site, Week, Month or Day.



Select the required button to view the data in the charts. To get back to the original data select the default option button.

## Interactive Visuals

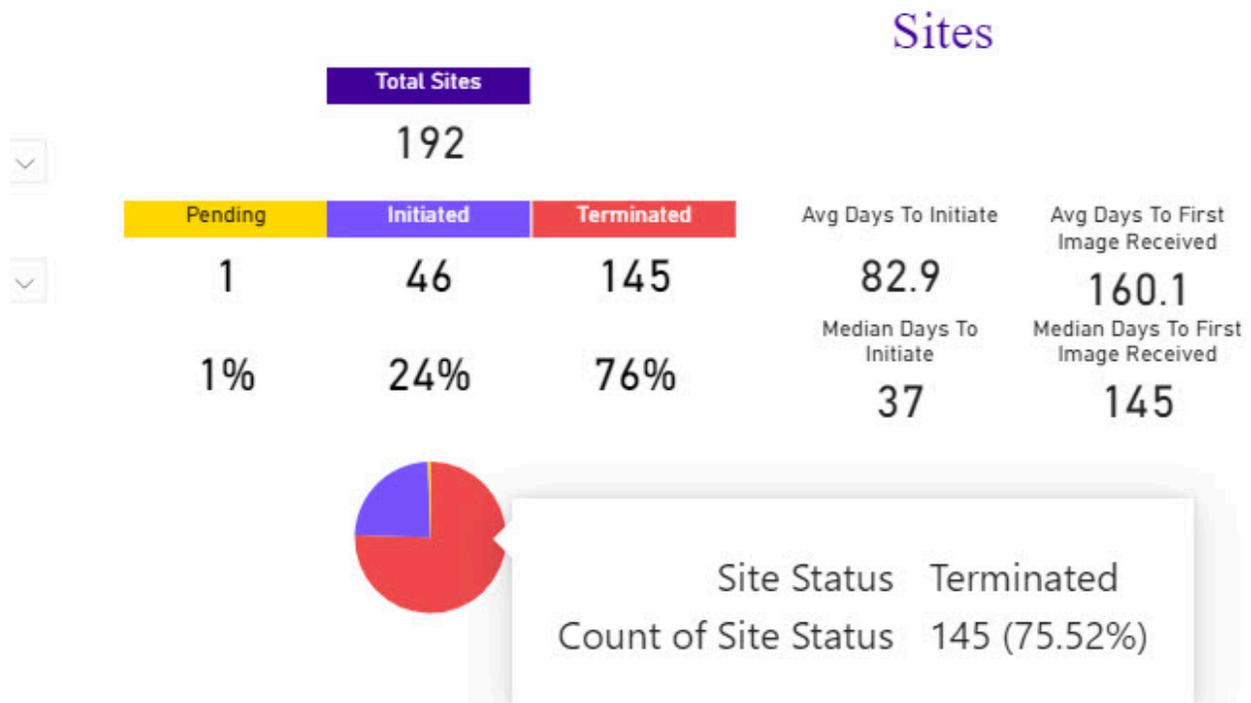
Some report elements can be clicked which affects other applicable visuals on the page. For example clicking a date value in a bar chart can filter other metrics on the page. Click the same element again to clear that filter.

For example in the image below, upon selecting the blue bar (completed cases for a time period), the adjacent bar chart (Pending cases by category) and the tabular data (Reviewer Summary) accordingly display the changed data.



## Hover Over Data

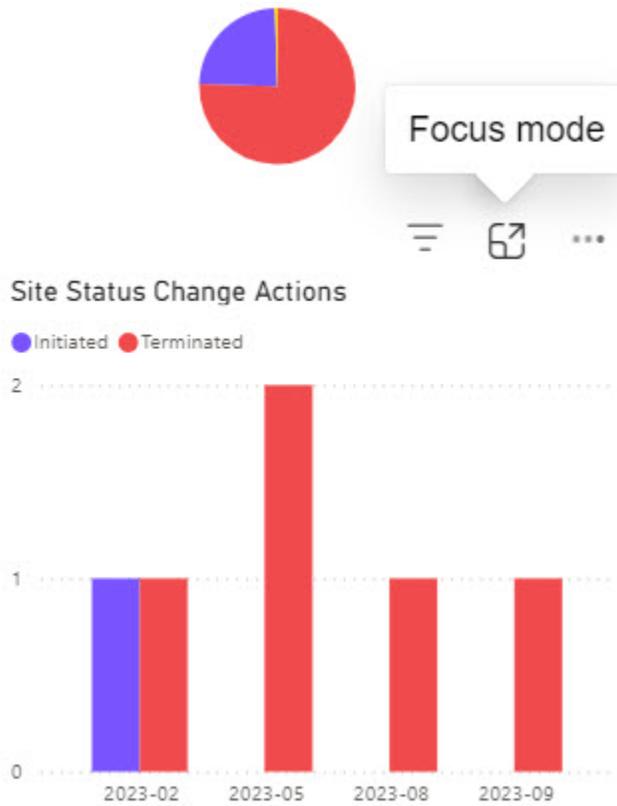
You can view the data value for a particular section of a visual by hovering your cursor over that section.

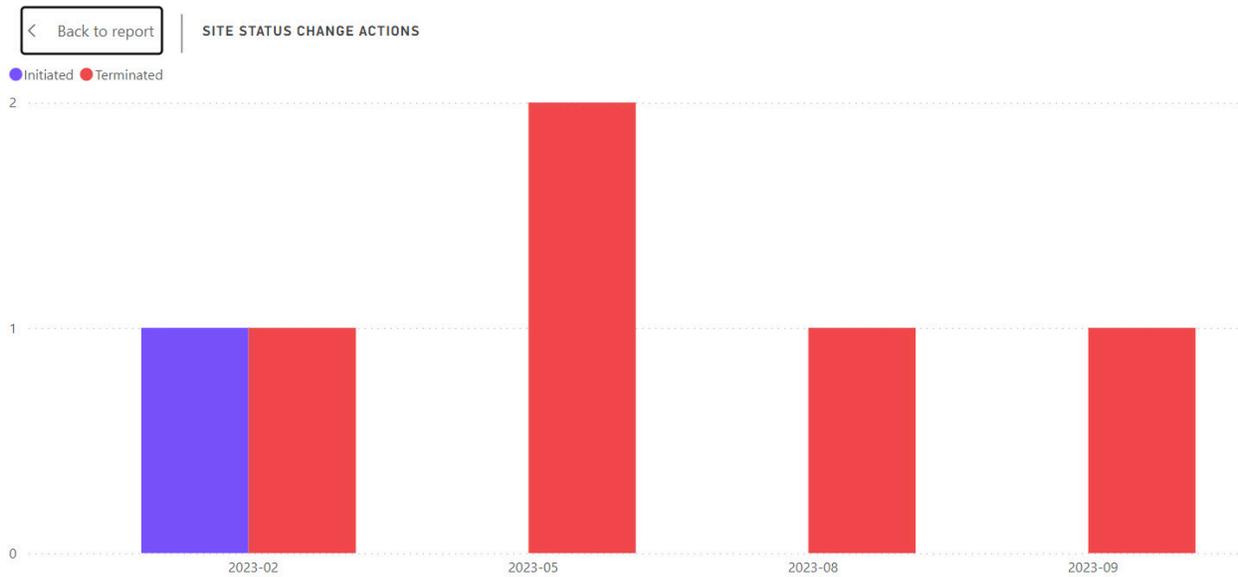


## Focus Mode

The Focus mode allows you to view a visual to full size of the window, where the other charts are not visible and only the selected chart appears.

For example in the below Site Status Change Actions, when we apply the Focus mode for the Site Status Change Actions chart (Figure 1), it is expanded to full screen (Figure 2).



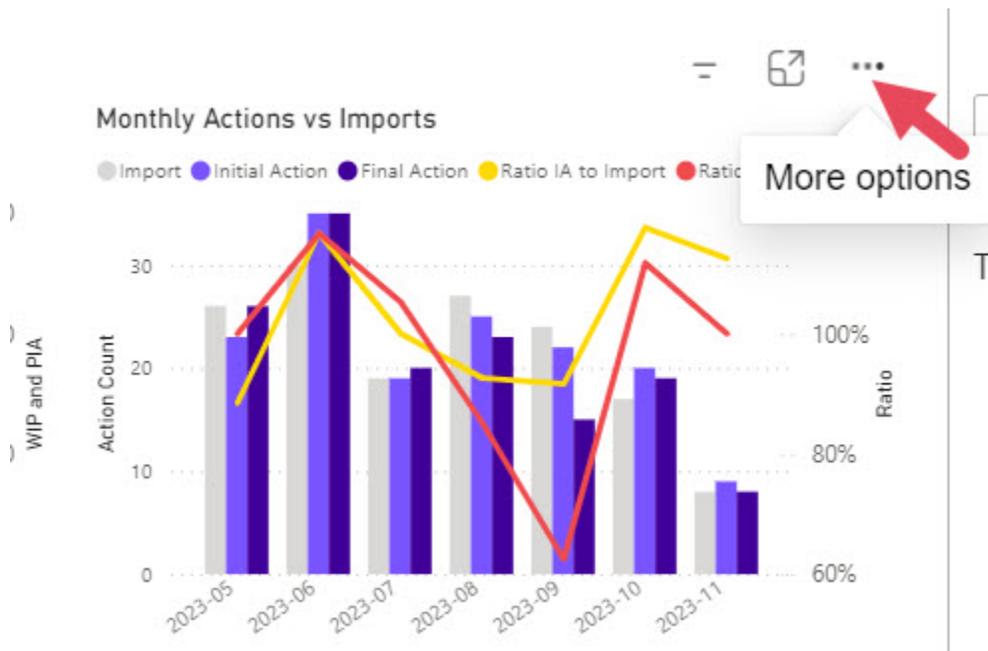


Click on Back to Report to get back to the original view.

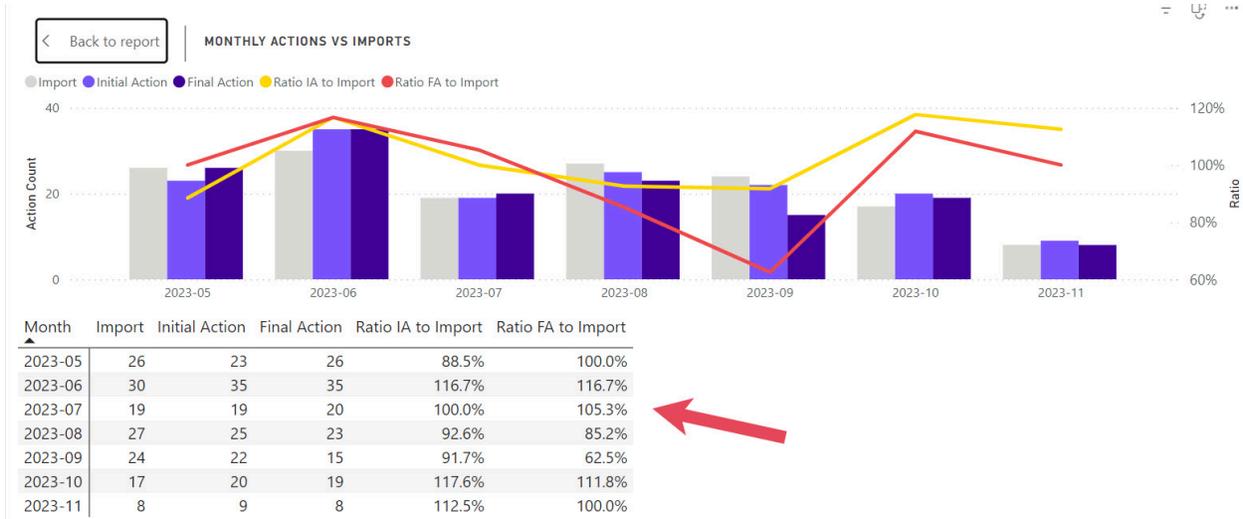
### Show as a Table

This option is useful to quickly see the data points for a given visual.

In the report section for a particular chart, click the three dots More options icon and select Show as a table.



The selected bar chart appears as a full screen with tabular data below it as shown.

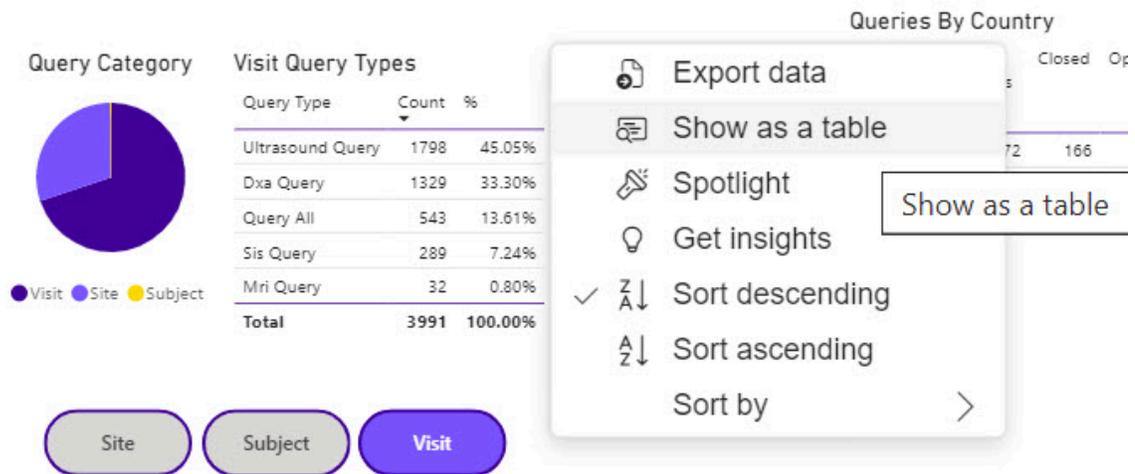


Click Back to Report at the top to get back to the Reports section.

### Download Reports

You can download Reports as necessary. To download a selected report:

1. Hover over a report and click More options.



2. Click Export data.

The *Which data do you want to export?* page displays.

3. Make the selections as appropriate.
4. Click Export.

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more about exporting data](#)

  
**Data with current layout**  
Export this data in the same layout you see now, but without any icons, colors, or other formatting you added.

  
**Summarized data**  
Export the summarized data used to create your visual (for example, sums, averages, and medians).

  
**Underlying data**  

ⓘ The report author turned off this option

File format:

.xlsx (Excel 150,000-row max) ▾

**Export** Cancel

The *Downloads* window displays.

5. Click Open file. The report displays.

*The underlying data option is disabled, but you can view and download underlying data by clicking the list link on each tab below the slicers and following the same steps above to download.*

## Subscribe to a report

Anybody (Internal to perceptible or external user) who wants to keep receiving the specific report for themselves, can subscribe to a report.

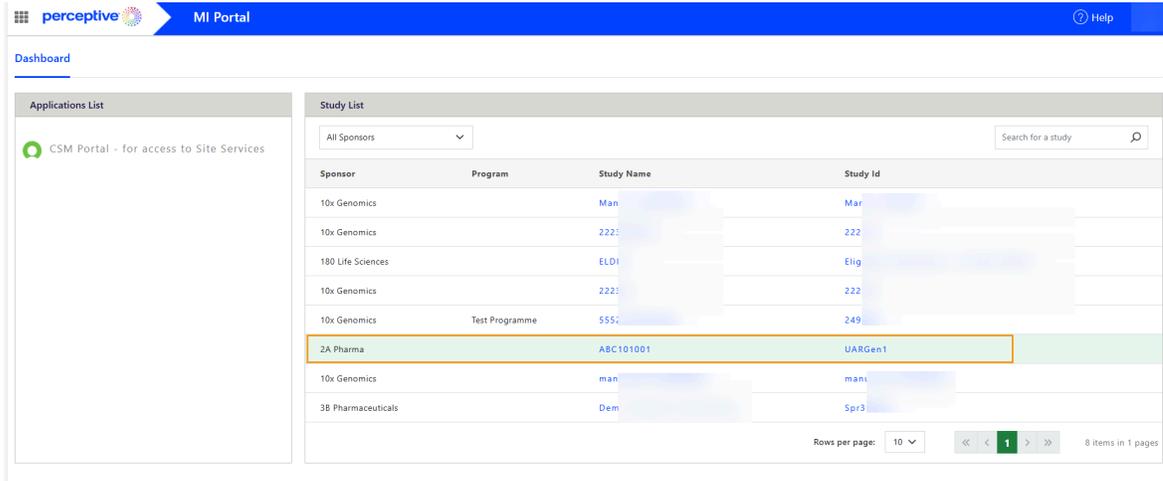


**Note:**

*You cannot subscribe to a report for anybody other than yourself in MI Portal.*

To Subscribe to a report in MI Portal:

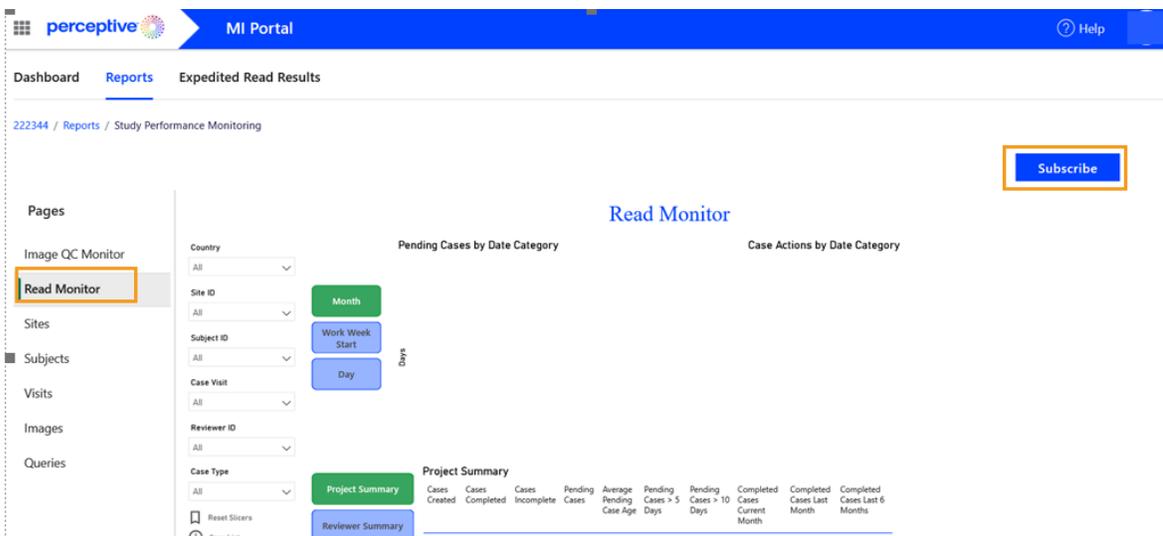
1. Login to the MI Portal.
2. Click on a study from the dashboard page.



3. Click on a Report Name.



4. Click on a page name to subscribe for the report.
5. Click **Subscribe**.



6. Select a day of the week and click **Confirm**.



**Note:**

A confirmation message displays on the screen.

### Subscribe to Report Page - Read Monitor ✕

✔ Subscription successful!

**Frequency**

Day of Week

Day of Month

Select All

Sunday     Monday     Tuesday

Wednesday     Thursday     Friday

Saturday

CLOSE

CONFIRM



**Note:**

You may select as many days as possible of a week you want to receive the updates on your selected study.



**Note:**

The report will be scheduled for the time at which you subscribe, to the closest 15 minutes.

The selected report is subscribed for you.

## Unsubscribe to a report

An external user can unsubscribe from MI Portal.

To stop receiving the report updates:

1. Login to the MI Portal.
2. Click on a desired study from the dashboard page.

The screenshot shows the MI Portal dashboard. On the left, there is an 'Applications List' with one item: 'CSM Portal - for access to Site Services'. The main area is titled 'Study List' and contains a table with columns: Sponsor, Program, Study Name, and Study Id. The table has 8 rows. The row for '2A Pharma' with 'Study Name' 'ABC101001' and 'Study Id' 'UARGen1' is highlighted with a green border. Below the table, there is a 'Rows per page' dropdown set to 10 and a pagination control showing page 1 of 1.

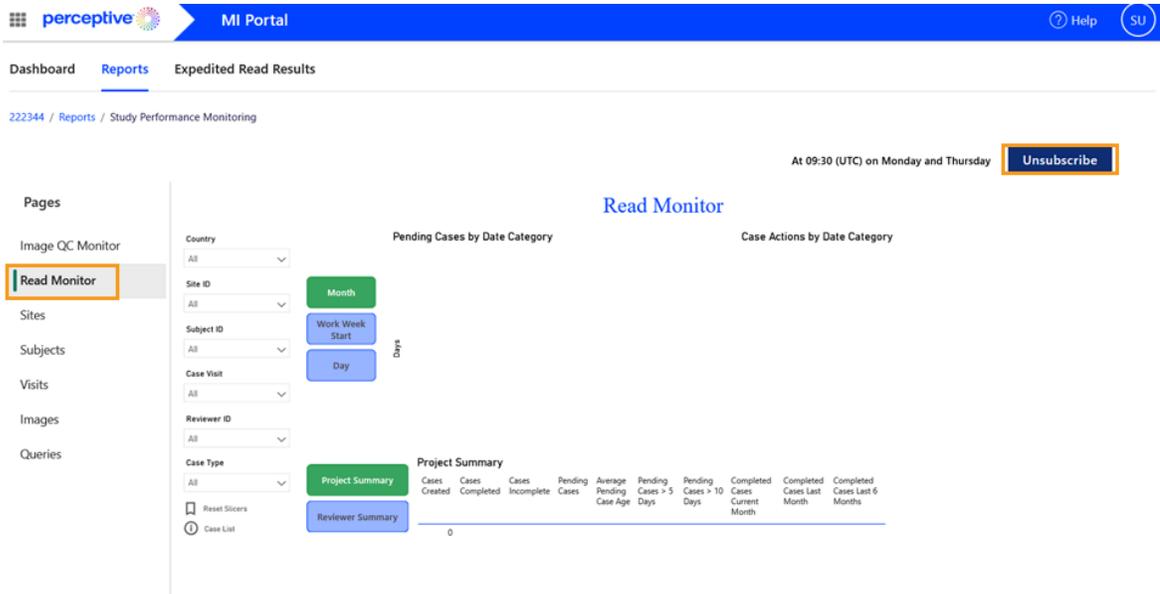
Sponsor	Program	Study Name	Study Id
10x Genomics		Man	Mar
10x Genomics		222	222
180 Life Sciences		ELD1	Elig
10x Genomics		222	222
10x Genomics	Test Programme	555	249
2A Pharma		ABC101001	UARGen1
10x Genomics		man	man
3B Pharmaceuticals		Dem	Spr2

3. Click on a Report Name.

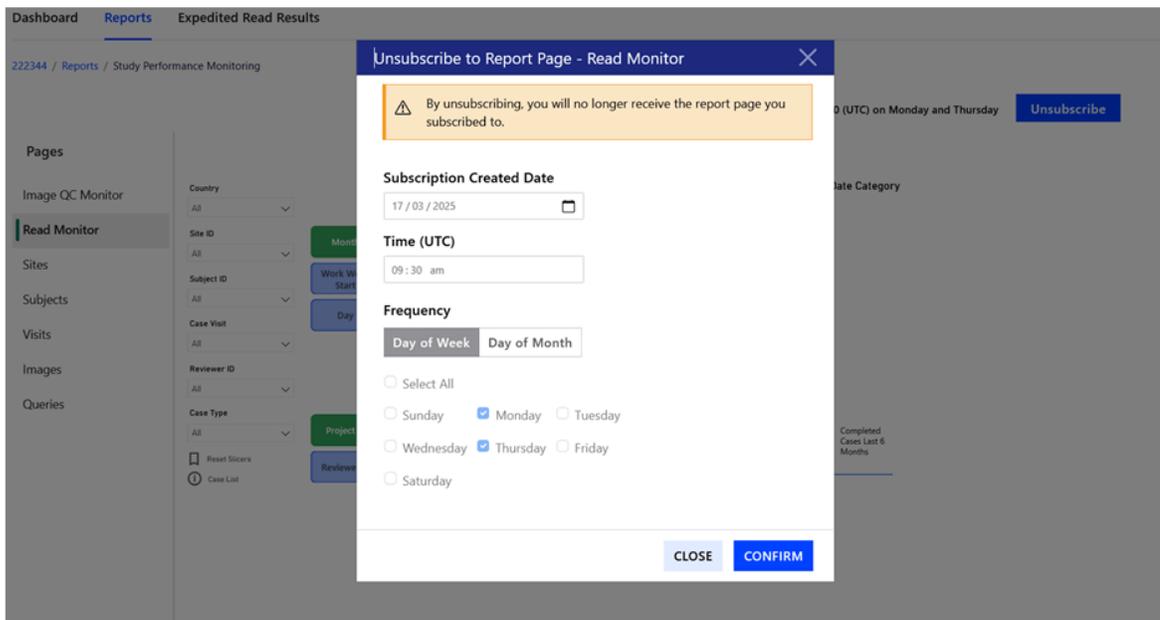
The screenshot shows the 'Reports' page for study 'UARGen1'. The page has a navigation bar with 'Dashboard', 'Reports', and 'Expedited Read Results'. Below the navigation, there is a 'Report Name' section with a table containing two rows: 'Study Performance Monitoring' (highlighted with a green border) and 'MI Portal User Access'. At the bottom, there is a 'Rows per page' dropdown set to 10 and a pagination control showing page 1 of 1.

Report Name
Study Performance Monitoring
MI Portal User Access

4. Click on a page name to unsubscribe for the report.
5. Click **Unsubscribe**.



6. A confirmation message appears, click **CONFIRM**.



The Page is Unsubscribed.