Overview

If the MasterControl Administrator has granted you access to **Analytics** under **My MasterControl** in the Navigation menu, you can use the information in this quick reference guide (QRC) to generate a number of reports using **Documents** application data.

About Reports

MasterControl enables users with access to **Analytics** to generate standard and custom reports for the applications in MasterControl. This QRC covers the standard reports available for the **Documents** application.

Logically, you can generate reports on only the data that the MasterControl Administrator has granted you access. For this reason, a group of users (with different assigned roles) can have different levels of detail or number of elements from one person's report to the next.
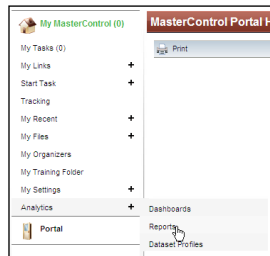
You can export the generated report to either Microsoft Excel or Adobe PDF. Charts can only be exported to PDF.

Accessing Reports

To open a report:

1   In MasterControl, on the **Navigation** menu, expand **My MasterControl**.
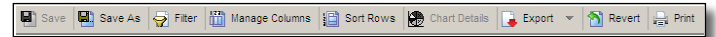
2   Select **Analytics>Reports**.

The Reports page appears, grouping the reports you have access to by application.

3   Click **MasterControl Documents**.

A list of all **Reports** available to you appears.

4   On the far right side of the row for the report you want, click the **View Reports** icon.
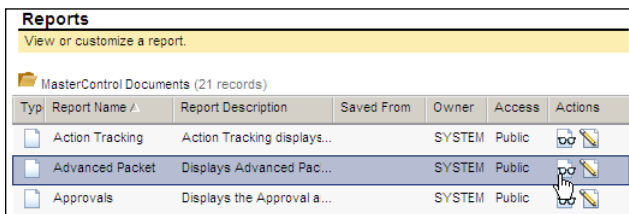
The report opens in a new window with a toolbar of icons across the top.

To enable large reports to open more quickly, the initial view of a standard report shows only the top 15 results. To see more of the report, go to the upper right corner and either:

*   Click the « ‹ › » buttons
    Or
*   Change the 15 in the # [15] box to a higher number.

Printing the Report

Important! Be certain the report is set the way you want. You will be unable to return directly back to the report once you request a print.

You can produce a hardcopy of the current view of the report by clicking the **Print** button in the toolbar. Two changes occur at about the same time:

*   MasterControl converts the page to printable output and replaces your view of the report with the converted page format.
*   Your operating system's **Print** dialog window opens for you to select a particular printer and printing options before printing.

To return to the report, you must close the current browser window/tab and launch the report again from the Reports screen.

Exporting the Report

To create an electronic file of your current view of a report, go to the toolbar and click the **Export** button. On the drop-down menu select either **Excel** or **PDF**.
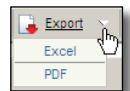
*   If you select **Excel**, a confirmation message appears. We recommend you click the **Open** button so you use Excel itself to edit and save the file. This ensures compatibility with your version of Excel.
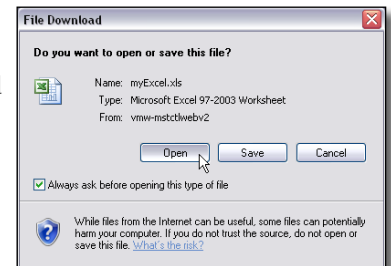
- If you select **PDF**, a new browser window opens with the report in PDF format. Use PDF controls to print, save, or email the file.
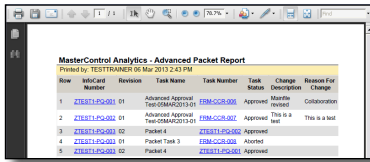
Editing a Custom Report

If the MasterControl Administrator has granted you access to the editing buttons on the toolbar, you can rearrange and filter information to customize a report to match your specific needs.

Using Save or Save As

Not all users with editing rights have the permission level to use these buttons. By default, the reports you create are considered *Private* (no one else can view it).

To save a customized report with the same name as the earlier version, click the **Save** button (this button is unavailable for standard reports).

To save a customized report with a *different* name, then click . The **Save Customized Report** screen appears.

1   In **Report Name**, enter a new name for your report.

2   In **Report Description**, describe the purpose of the report.

3   If you have been given the ability to make a custom report *Public* (all users can select and view), then you have the option of making a private report *Public* (by selecting the **Make Public** checkbox) or making a previously public report *Private* (clearing the **Make Public** checkbox).

4   On the toolbar, click .
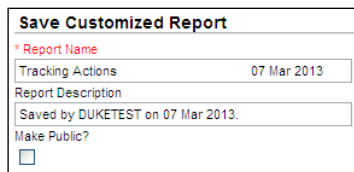
Filtering the Data

To reduce the number of rows on a report, you can filter the data to display only the information you need. Click to access the **Select Fields to Filter On** screen. The exact fields on this screen vary with each report.
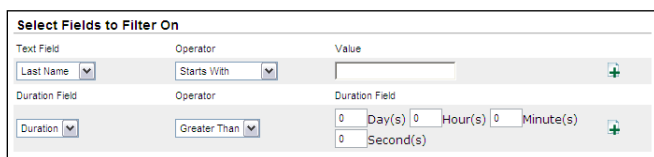
On at least one row enter Operators/Values, dates, durations, or other information to narrow down your list. If you need to

enter more information against a field, click to have a new row for the same field appear.

Example: In the illustration below, you limit the list of names to only those that fall between *Fa* and *St* as their first two letters.
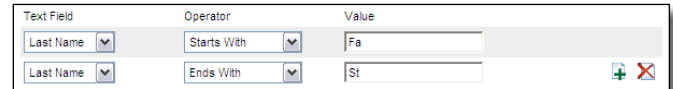
Click to view the results of your filter on the report.

Sorting Rows

To rearrange the order that rows appear in the report, click the button. The Sort Rows screen appears.
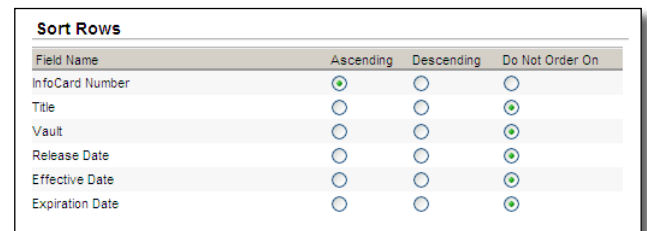
You can sort rows in ascending (A to Z, 0 to 9) or descending order (Z to A, 0 to 0), or force no sort, against specific columns. For best results, limit sorting to one column per level in a report.

Click to view the results of your sorting on the report.

Managing Columns

Want to rearrange or add/delete columns? Click to have the **Manage Columns** screen appear for the report.
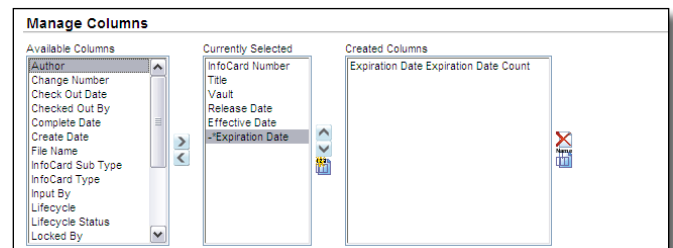
For all of the following procedures, click to view the results of your editing of the columns on the report.

► **Rearrange Columns**

In the **Currently Selected** box, select the column you want to move. Use the up or down arrow (immediately to the right of the box) to move the highlighted column upward or downward on the list (the column names at the top are leftmost on the report).

► **Remove Column**

In the **Currently Selected** box, select the column you want to hide. Immediately to the left of that box, click the left-facing arrow. The column name slides to the **Available Columns** box.

► **Add an Available Column**

In the **Available Columns** box, select the column you want to add to the report. Immediately to the right of that box, click the right-facing arrow. The column name slides to the **Currently Selected** box. If needed, see "Rearrange Columns" to place the new column in the location you need it.

► **Add a Column You Create**

You can create a new column based on an existing column in the **Currently Selected** box.

1   Select which existing column you want to use as a basis for the new column.

2   Underneath the up/down arrows, click [icon].

The **Create a New Column** window appears. The exact fields vary with the contents in the existing column.
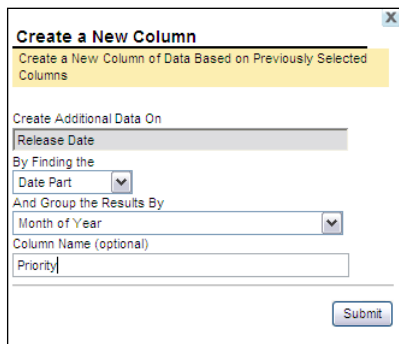
3   Make selections or enter information, as needed, to define the contents of your new column.

4   Enter a **Column Name** (recommended).

5   Click **Submit**.

The Manage Columns screen reappears. If accepted, your new column appears in the **Currently Selected** box. If there was a problem, your new column appears in the **Created Columns** box.
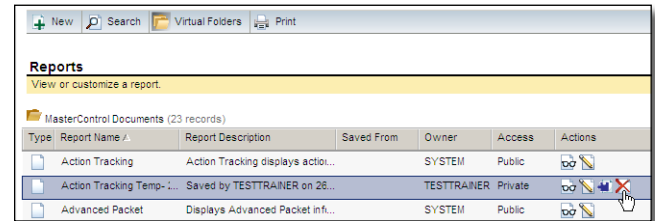
Reverting Back to the Beginning

To discard the changes you made and return to the report's original data and formatting, click [Revert icon].

Deleting a Custom Report

You can also delete your own (not someone else's) saved reports.

1   On the **Reports** page, find the Private report you want to delete, and then click [X] at the end of its row.

A confirmation message appears.

2   Click **OK**.

The report no longer appears in the Reports list.

Getting Help

If you experience any technical problems working with MasterControl that you are unable to resolve, email the Duke Clinical Research Institute (DCRI) Service Desk at dcriservicedesk@dm.duke.edu. For time-sensitive issues, call them Monday–Friday (except DCRI holidays), 6 a.m. to midnight, at 919.668.8916.