

Study Items List

The Study Items List Page is a place to view all of the Items for a Study. One benefit of using the Study Items List page is it allows you to see what status the items are in.

Navigating to the Study Items List Page

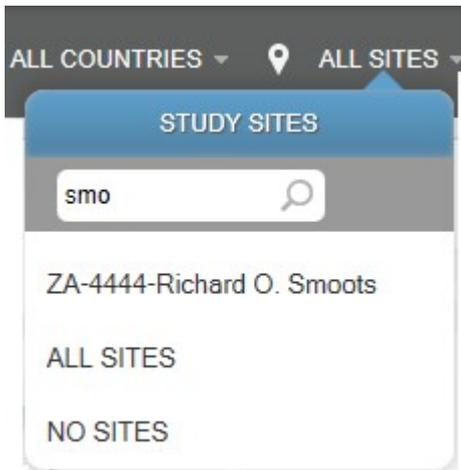
From the [User Home](#) Page, select the name of a Study in the Recent Studies List or Favorite Studies List. If the study is not listed, you can search for it by clicking the [More Studies](#) button at the bottom of the page.

Filtering the Study Item List

In an unfiltered study item list, you will see all planned and received documents for **all countries** and **all sites**. One way you can limit the study items displayed is by using the Countries and Sites breadcrumbs.

When you choose a country from the country breadcrumb, you will see all study items that apply to that country and all study level study items. Selecting "All Countries" from the breadcrumb will show all country level study items. Selecting "No Countries" from the breadcrumb will display only study level study items.

You can also limit the study items displayed using the Sites breadcrumb. The Sites breadcrumb menu displays all sites by country code, site ID and PI Name. You can find a site by typing any part of the entire string. For instance, here the user locates the site where Richard Smoots is the PI by typing "smo".



Since the site is located in South Africa, the country in the Country breadcrumb will be set to ZA (South Africa) automatically when this site is selected. The Study Items list will then display all items at the study level, all items for the country of South Africa, and all items for the site 4444.

You can also limit items displayed using filters in the [Narrow Choices](#) panel on the left.

Key Information

Information about an item is displayed on the Study Items list. Study item metadata can be found under each item. Clicking on an item's record displays more information. An item shaded in pink is past due.

Study Item metadata can be found here. Select the Study Item to see more information. The View Versions link is shown if there are multiple Final / Obsolete / Superseded versions.

The hyperlink allows viewing of both content and metadata.

Pink shading indicates a past due document. Yellow shading (not shown) indicates a coming due document.

Actions Menus

Each study item has an Actions menu that displays all actions available to you based on the status of the study item, your relationship to the study item, and your role/permissions.

Acceptance of Investigator Brochure
 Ref Model ID: 05.02.01 Doc Type ID: 105.09
 SPH5654 / UNITED STATES / 9923
 Level: Site
 Document Status: Uploaded
 Due Date: 26-Nov-2014
 Milestone: Site Milestone - IIP Approval
 Workflow Tasks: Work Area (Françoise Martin [CRA])

Acceptance of Investigator Brochure
 Ref Model ID: 05.02.01 Doc Type ID: 105.09
 SPH5654 / UNITED STATES / 1
 Level: Site
 Document Status: InApproval
 Due Date: 25-Feb-2015
 Milestone: Site Milestone - IIP Approval
 Workflow Tasks: eSignature (William Richmond/Not Received)

ACTIONS
 Create Expected Document
 Generate Transmittal
 Report an Issue...
 Upload To Study Item...
 View Audit Trail...

The list also has a dedicated Actions menu containing actions that can be performed on items in bulk. Again, the actions available will vary based on your role/permissions.

364 ITEMS FOUND

ACTIONS

- Add Study Item...
- Execute Event...
- Export ▶
- Add All To Clipboard
- Add All to Favorites
- Mark All As Fulfilled...
- Mark All As Unfulfilled...
- Delete All...
- Make Obsolete and Revise All Items...
- Make Obsolete and Retire All Items...
- Create Expected/Generate Transmittals
- Reports and Dashboards ▶
- Reconcile / Unreconcile Documents...
- ISF Export...

Investigator Brochure
J1 Doc Type ID: 105 09
TATES / 9657

Investigator Brochure
J1 Doc Type ID: 105 09
TATES / 9923

Investigator Brochure
J1 Doc Type ID: 105 09
TATES / 1

Investigator Brochure - 07-Oct-2015
J1 Doc Type ID: 105 09
TATES / 5005