

# Reconciliation Dashboard

A Reconciliation Dashboard can be accessed from the Reports and Dashboards sub-menu, which is available in the following locations:

- within the More menu in the eTMF header
- within the Actions menu of any study item list

The Reconciliation Dashboard displays detailed information on site reconciliation using interactive tables and charts. You can filter the dashboard to display only the information you need by using the values that appear in the Narrow Choices Panel on the left.

You can collapse the Narrow Choices Panel (and expand the display of charts and tables) by selecting the left-facing arrow at the top of the panel. In addition, you can collapse any of the dashboard areas by selecting the down arrow next to the area's title.

The Dashboard contains two primary areas of content: an interactive Analysis area and a Late Reconciliation Threshold area.

**RECONCILIATION DASHBOARD**

Use filters on the left to further narrow results.

**LATE RECONCILIATION THRESHOLD**  
30 days

**ANALYSIS** STUDY

STUDY	NUMBER TO BE RECONCILED	NUMBER UNRECONCILED	NUMBER RECONCILED	NUMBER N/A	% UNRECONCILED	% RECONCILED	NUMBER LATE FOR RECONCILIATION	% LATE FOR RECONCILIATION
CT140105	20	20	0	0	100.0%	0.0%	0	0.0%
A0420172	40	40	0	0	100.0%	0.0%	0	0.0%
C0650195	20	20	0	0	100.0%	0.0%	0	0.0%
A0350126	20	20	0	0	100.0%	0.0%	0	0.0%
A0420171	88	88	0	0	100.0%	0.0%	0	0.0%
A0350501	11	11	0	0	100.0%	0.0%	0	0.0%
C0650196	20	20	0	0	100.0%	0.0%	0	0.0%
A0350500	9	9	0	0	100.0%	0.0%	0	0.0%
A0350125	44	44	0	0	100.0%	0.0%	0	0.0%

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The Analysis area displays a table of information for analysis. The data in the card is grouped by the value selected from the drop-down field. It may be useful to group by Reconciled For Site, so you can view data by each site needing reconciliation. The example above shows a grouping by study. If you select a study from the table, the Dashboard will filter to show only data relevant for that study.

The table contains the following columns:

- **Number to be Reconciled:** number of possible study item-site reconciliations for study items configured to be needed for the SMF
- **Number Unreconciled:** out of number to be reconciled, number of study items that have not been reconciled or marked as Not Applicable for reconciliation
- **Number Reconciled:** out of number to be reconciled, number of study items that have been reconciled
- **Number N/A:** out of number to be reconciled, number of study items that have been marked as Not Applicable for reconciliation
- **% Unreconciled:** percentage of items unreconciled, derived by dividing the number unreconciled by the

number to be reconciled

- **% Reconciled:** percentage of items reconciled, derived by dividing the number reconciled by the number to be reconciled
- **Number Late for Reconciliation:** number of study items that have not been marked as reconciled or Not Applicable for reconciliation AND for which the finalization date is  $< (\text{Today} - \text{Late threshold})$
- **% Late for Reconciliation:** percentage of items late for reconciliation, derived by dividing the number late for reconciliation by the number of unreconciled items

The % Reconciled value in the Analysis table is color-coded red, yellow, or green based on reconciliation thresholds for your organization. For example, a red value indicates that the percent is below what is considered acceptable. The number of days after finalization upon which reconciliation is considered late is shown in the Late Reconciliation Days area.

Use the icon at the top right of the page to export the dashboard information to an Excel file. You can access the Excel File from the Downloads area of eTMF. Note that if there are more than 32,000 results to export, only summary information from the charts will be included in the export file; report details will not be included.