Workqueue 2062 Report
If you have any questions on the report, please contact ORI-Reports@dm.duke.edu.

To access the Workqueue 2062 Report, begin by navigating to our website, below:

https://medschool.duke.edu/research/research-support-offices/office-research-informatics/ori-data-reporting

Navigate to the MaestroCare Reports section of the page, click on the banner....

After clicking on this link, you will log in to Business Objects using your standard Duke Net ID and password.

When the report opens, you can control what is displayed in the report by accessing the ‘Input Controls’ box on the far left of the screen. The Input Controls box is the third item from the top.
Using the input controls, you can filter via EIGHT methods:

1. Days on Queue (Greater than or equal to)
2. CRU
3. CRC Review Status
4. Account Balance (Greater than or equal to)
5. Study CRC
6. Study Status
When the report is first run, only one filter is applied (see below). At the top of the screen, you will see the name of the report and the current date (indicating the report is current as of that day).

**RSH038-006: WQ 2062 Export (As of 5/31/17)**

When the report is first run, the only filter that is applied is the Account Balance greater than or equal to. This is initially set to -999,999.

```
<table>
<thead>
<tr>
<th>Acct Balance</th>
<th>&gt;=</th>
</tr>
</thead>
<tbody>
<tr>
<td>-999999</td>
<td></td>
</tr>
</tbody>
</table>
```

Two of the filters (Days on Queue and Account Balance) require that you type in a numeric value. For these filters, you must click on the ‘OK’ button to the right of the filter after entering in the chosen numeric value to enable the filter.

For example, after entering the report, we now wish to display all records which have been on the queue for longer than 15 days. For now, we will leave the Account Balance filter as is. First, we will enter in ‘15’ in the Days on Queue filter, and then we will click ‘OK’. At this point, the filter screen should appear as shown below.
After we click on ‘OK’, we are now viewing all records which have been on the queue for **15 days or more** and in which the account balance is greater than or equal to -999,999.

Now, let us change the Account Balance filter to only display records where the account balance is greater than or equal to 10,000. At this point, the filter screen should look appear as shown below.

Enter in 15 days...and then click on 'OK'.
After clicking on 'OK' for the Account Balance filter, we are now displaying records where:

- The days on the queue is greater than or equal to 15
  AND
- The account balance is greater than or equal to 10,000.

Enter '10000' (no commas) in the Account Balance filter, and then click on 'OK'.

After clicking on 'OK' for the Account Balance filter, we are now displaying records where:

- The days on the queue is greater than or equal to 15
  AND
- The account balance is greater than or equal to 10,000.
Note that when you filter, the filters are **AND** filters – that is, the records displayed must match both criteria.

If we were to add in one more filter, CRU = ‘Radiology’, we find that (as of 5/31/2017), no records match all three criteria.

Adding in the third filter, CRU = ‘Radiology’, we now see that there are no records which match all THREE criteria (as of 5/31/2017 - this may change):

- Days on Queue >= 15 Days
- CRU = Radiology
- Account Balance >= 10,000

Note that for the 5 input controls which are drop-downs or checkboxes, you don’t need to click on anything after making your selection; the filter will be applied after you make your selection.

Some records **cannot** be resolved to a protocol. For these records, since they cannot be resolved to a given protocol, they will not have an associated Clinical Research Unit (and their Clinical Research Unit will display as ‘-’, as shown below).
To export the report, you will click on the export control (shown below; it is the seventh button from the left on the top Web Intelligence toolbar, and it appears as an arrow coming out of a sheet of a paper). After selecting this, you can export to .xlsx or .xls to preserve the formatting, and the report will be downloaded to your Downloads folder (or folder you have chosen to save your downloads on your local machine), with the title RSH038-006_WQ_2062_Export.xlsx/xls.

After exporting to Excel, you’ll have to make a minor adjustment to allow for filtering. Delete the header rows (Row 1, 2) where the title of the report is displayed. Additionally, you will need to delete the extraneous initial column (Column A). Once that is done, you will be able to filter on the first header row, in blue.
Delete the first two rows (1,2) and the first column (A).