

OpenTA

BY TA SCAN

User Manual

Instant clinical trial insight, at no cost

Version 1.47

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Powered by Anju Software

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1. Introduction

OpenTA by TA Scan is a free, web-based clinical trial intelligence platform. It gives life sciences professionals immediate access to comprehensive landscape analytics, site selection data, and investigator identification — without the paywall or complexity of traditional enterprise tools.

Powered by the same data engine behind TA Scan — trusted by life sciences teams for over 15 years — OpenTA is designed for individual contributors who need fast, reliable insight on demand.

1.1 Key Capabilities

- **Landscape Analysis:** Get comprehensive market and competitive landscape insights for any therapeutic area.
- **Site Selection:** Assess feasibility clinical trial site identification using geographic and demographic data.
- **Investigator Identification:** Understand where potential investigators for your clinical trials are located.
- **Projects & Reports:** Save filtered analyses into named projects for future reference and comparison.

1.2 System Requirements

OpenTA is a browser-based application. No installation is required.

Requirement	Details
URL	https://openta.anjudp.com
Browser	Google Chrome, Microsoft Edge, Firefox (latest version recommended)
Internet	Active internet connection required
Account	Free account registration at openta.anjudp.com/signup

2. Getting Started

2.1 Accessing OpenTA

Navigate to openta.anjudp.com in your web browser. The OpenTA homepage provides an overview of the platform and quick access to sign in or create a new account.

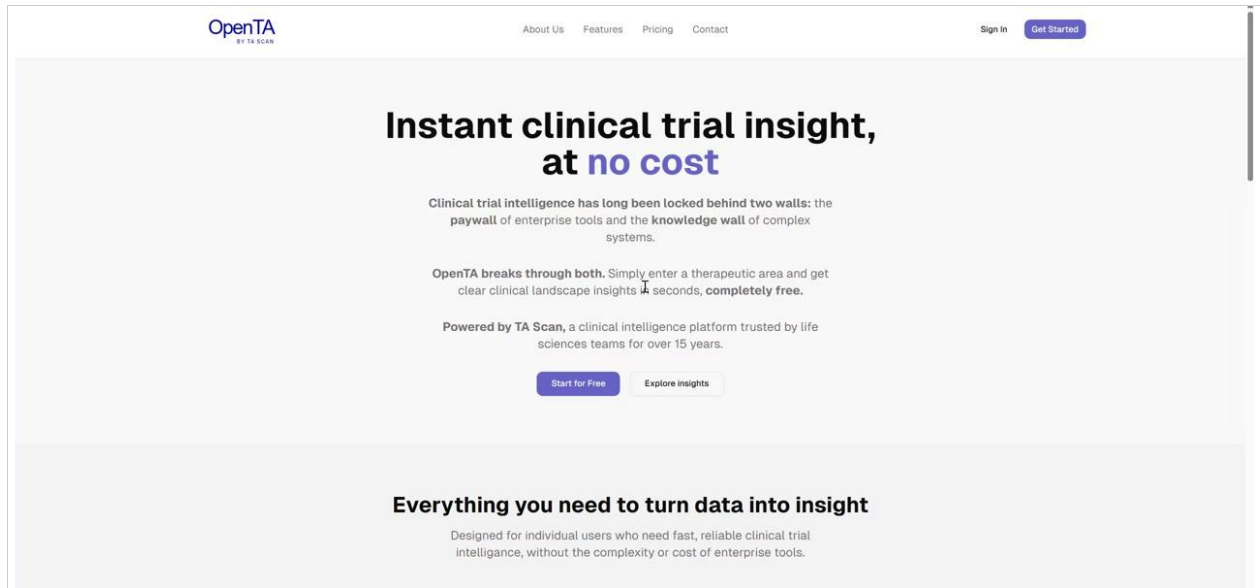
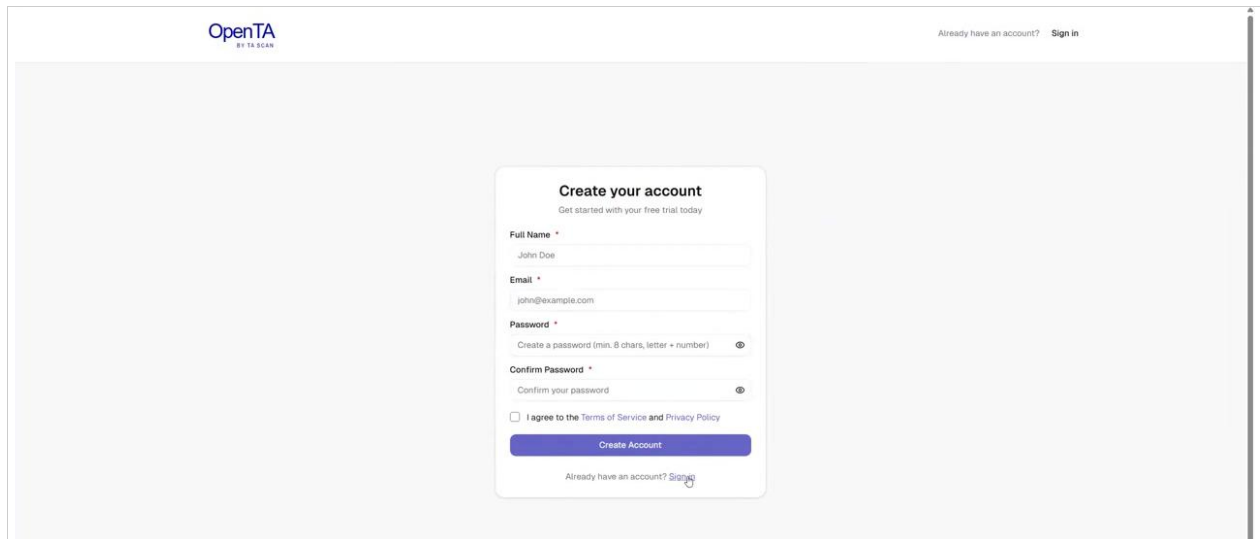


Figure 1 – OpenTA homepage at openta.anjudp.com

2.2 Creating an Account

If you are a new user, click Get Started or Sign up to register for a free account.

- 1 Click Get Started or Sign up in the top navigation bar.
- 2 Enter your full name, email address, and a password (minimum 8 characters, containing at least one letter and one number).
- 3 Confirm your password in the Confirm Password field.
- 4 Check the box to agree to the Terms of Service and Privacy Policy.
- 5 Click Create Account. You will be redirected to your dashboard upon successful registration.



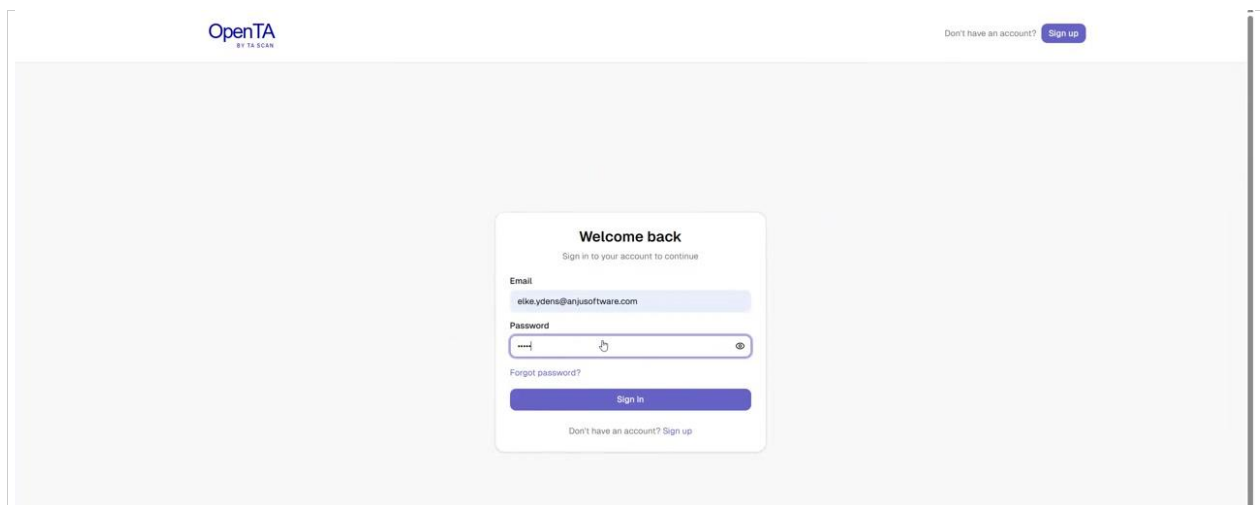
The screenshot shows the OpenTA account registration form. At the top left is the OpenTA logo, and at the top right is the text "Already have an account? Sign in". The form itself is titled "Create your account" and includes the subtext "Get started with your free trial today". It contains the following fields: "Full Name" (with "John Doe" entered), "Email" (with "john@example.com" entered), "Password" (with a hint "Create a password (min. 8 chars, letter + number)" and an eye icon), and "Confirm Password". Below these fields is a checkbox for "I agree to the Terms of Service and Privacy Policy" and a blue "Create Account" button. At the bottom of the form, there is a link that says "Already have an account? Sign in".

Figure 2 – Account registration form

2.3 Signing In

If you already have an account, click Sign In from the homepage or navigate directly to openta.anjudp.com/login.

- 1 Enter your registered email address.
- 2 Enter your password. Use the eye icon on the right of the field to toggle password visibility.
- 3 Click Sign In to access your dashboard.



The screenshot shows the OpenTA sign-in page. At the top left is the OpenTA logo, and at the top right is the text "Don't have an account? Sign up". The form is titled "Welcome back" and includes the subtext "Sign in to your account to continue". It contains the following fields: "Email" (with "elika.ydens@anjudsoftware.com" entered) and "Password" (with an eye icon). Below these fields is a link for "Forgot password?" and a blue "Sign in" button. At the bottom of the form, there is a link that says "Don't have an account? Sign up".

Figure 3 – Sign in page

Tip: If you have forgotten your password, click [Forgot password?](#) on the login page to receive a password reset email.

3. The Dashboard

After signing in you are taken directly to the Dashboard. This is the starting point for all analytical modules in OpenTA.

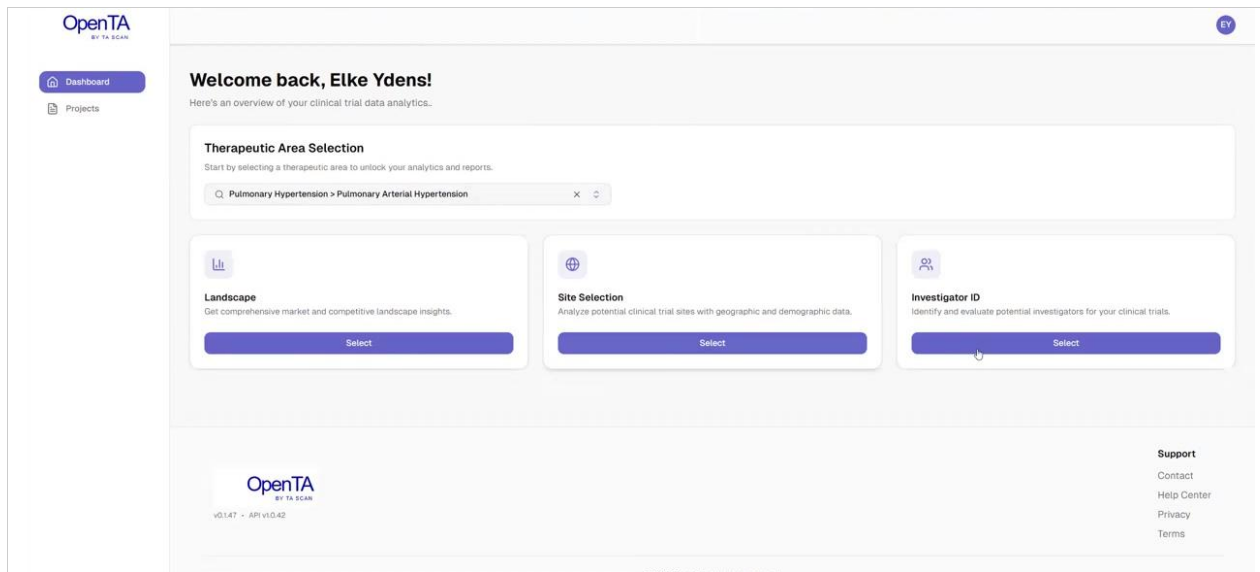


Figure 4 – The OpenTA Dashboard

3.1 Selecting a Therapeutic Area

Before launching any module, you must first select a Therapeutic Area. This scopes all analyses to your area of interest.

- 1 Click inside the Therapeutic Area search field at the top of the dashboard.
- 2 Type part of the therapeutic area name (e.g., "Pulmonary" or "PAH") to search the hierarchy.
- 3 Select the desired entry from the dropdown (e.g., Pulmonary Hypertension > Pulmonary Arterial Hypertension).
- 4 The three module cards — Landscape, Site Selection, and Investigator ID — will now be available for selection.

3.2 Module Overview

Module	Description
Landscape	Comprehensive market and competitive landscape insights. Includes trial counts, phase distribution, site tiering, timelines, and geographic breakdowns.
Site Selection	Analyze potential clinical trial sites using phase, geography, and sponsor experience filters. Includes site histograms, global distribution maps, and economic-block breakdowns.
Investigator ID	Evaluate potential investigators. Includes activity over time, sponsor experience, network size, and publication/presentation counts.

3.3 Navigation

The left sidebar provides quick navigation between the two main areas of the application:

- **Dashboard** — Return to the module selection screen at any time.
- **Projects** — View and manage all saved reports.

4. Landscape Module

The Landscape module delivers a comprehensive market overview of clinical trial activity within your selected therapeutic area. It covers trial counts, phase distributions, site tier distributions, geographic breakdowns, and historical timelines.

4.1 Setting Landscape Filters

From the Dashboard, click Select under the Landscape card. You will be taken to the Landscape Filters page.

Figure 5 – Landscape Filters page (upper section)

Therapeutic Area

The therapeutic area selected on the dashboard is pre-populated. You may change it by clicking the search field and selecting a different area.

Phase

Select one or more trial phases to include in the analysis: Phase 1, Phase 1/2, Phase 2, Phase 2/3, Phase 3, Phase 3/4, and Phase 4. Leave all unchecked to include all phases.

States

The States panel allows filtering by trial recruitment status. Use the tabs to switch between Ongoing, Halted, Completed, and Availability views. Within each tab, select the relevant sub-states (e.g., Recruiting trials, Not yet recruiting trials, Active not recruiting trials).

Study Start Date

Optionally restrict results to trials that started within a date range. Enter dates in the Later than or Earlier than fields using the calendar picker.

Geography

Click Select geography to open a hierarchical location picker. Select economic blocks (e.g., Europe), sub-regions (e.g., Europe West), individual countries, or states in the United States.

Trial Type and Sponsor Type

Use the Trial Type dropdown to select Interventional or Observational trials. Use the Sponsor Type dropdown to filter by Commercial or Academic sponsors.

The screenshot displays the OpenTA Landscape Filters interface. On the left is a navigation sidebar with 'Dashboard' and 'Projects'. The main content area is divided into several filter sections:

- Phase:** Radio buttons for Phase 1, Phase 1/2, Phase 2, Phase 2/3, Phase 3, and Phase 3/4.
- Study Start Date:** Two date pickers labeled 'Later than' and 'Earlier than' with 'dd/mm/yyyy' format.
- Trial Type:** A dropdown menu currently set to 'Interventional'.
- States:** A horizontal filter bar with 'Ongoing', 'Halted', 'Completed', and 'Availability'. Below it are checkboxes for 'Ongoing', 'Not yet recruiting trials', 'Recruiting trials', and 'Active not recruiting trials'.
- Geography:** A dropdown menu labeled 'Select geography...'.
- Sponsor Type:** A dropdown menu with 'Commercial' selected and 'Academic' as an option.

At the bottom, an 'Applied Filters' summary bar shows three active filters: 'Phase: Phase 1, Phase 1/2, Phase 2, Phase 2/3, Phase 3', 'States: Ongoing, Not yet recruiting trials, Recruiting trials, Active not recruiting trials', and 'Trial Type: Interventional'. A 'Clear all' button is on the right. Below the summary bar is an 'Apply Filters' button with '3 filter(s) applied' text underneath.

Figure 6 – Landscape Filters with applied filters visible at the bottom

Note: Applied filters are shown in a summary bar at the bottom of the page. Click the × next to any filter tag to remove it, or click Clear all to reset.

1 Configure your desired filters as described above.

2 Click Apply Filters to generate your Landscape results. The number of active filters is shown below the button.

4.2 Reading Landscape Results

After applying filters, the Landscape Results page displays your selected filters and a full set of analytics charts and summary cards.

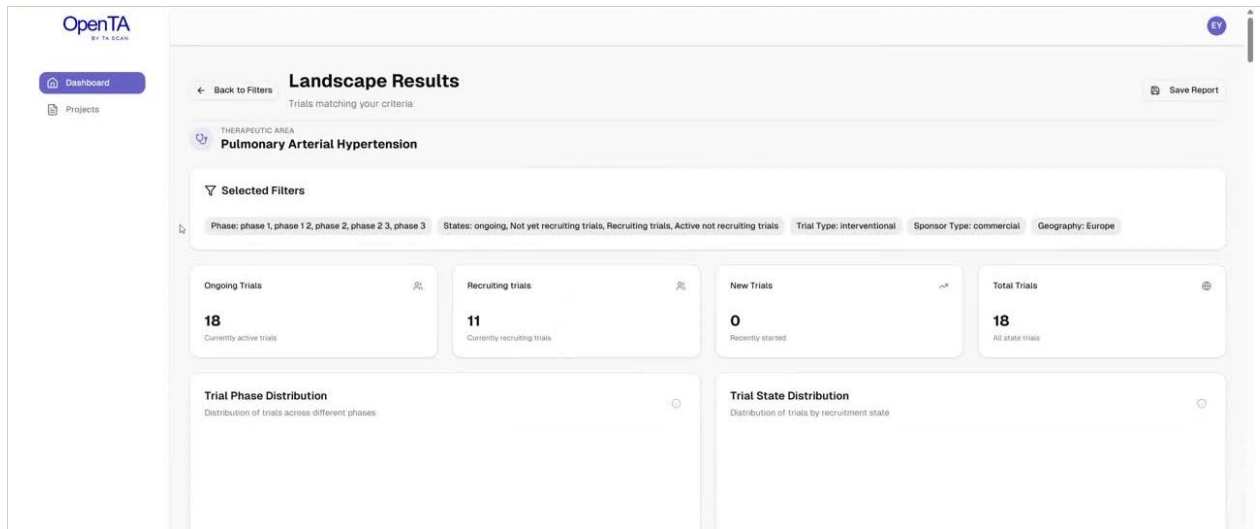


Figure 7 – Landscape Results: summary cards and selected filters

Summary Cards

At the top of the results you will find four headline metrics:

- Ongoing Trials — currently active trials matching your criteria.
- Recruiting Trials — trials currently recruiting participants.
- New Trials — recently started trials.
- Total Trials — all trials across all states matching your criteria.

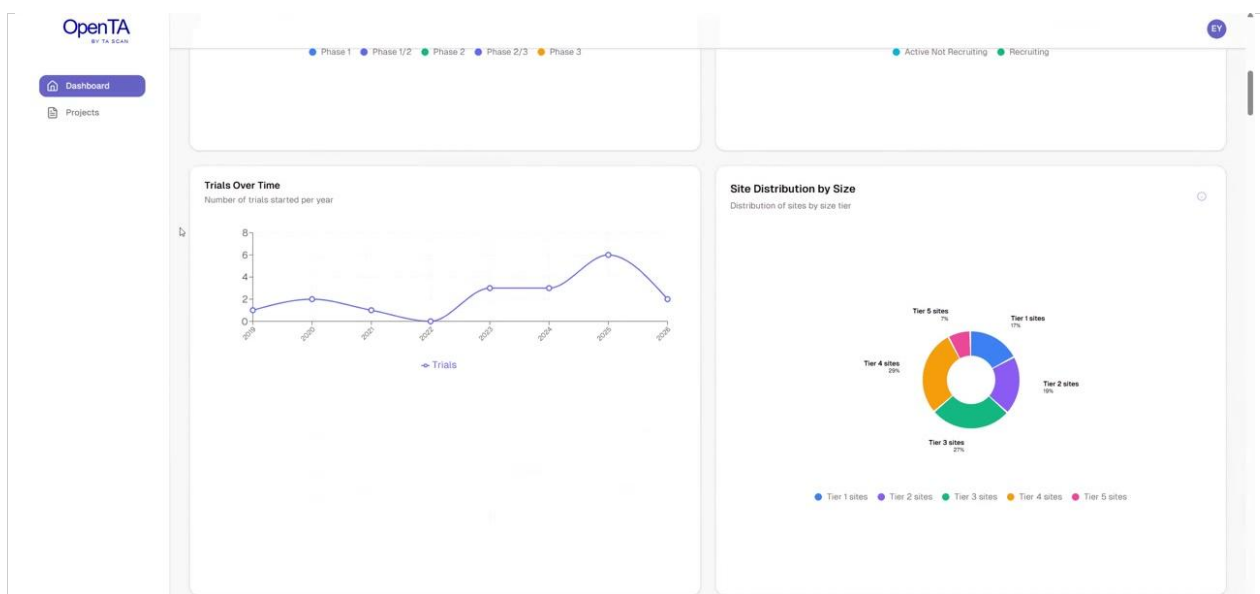


Figure 8 – Landscape Results: Trials Over Time and Site Distribution by Size charts

Available Charts

Scroll down to explore the full set of visualizations included in the Landscape report:

- Trial Phase Distribution — pie chart of trials by phase.
- Trial State Distribution — breakdown by recruitment state.
- Trials Over Time — number of trials started per year.
- Site Distribution by Size — pie chart of sites by tier (Tier 1 to Tier 5).
- Trials by Economic Block — number of recruiting commercial trials per region.
- Phase Statistics — detailed statistics by trial phase.
- New Trials — detailed information about recently started trials.
- Landscape Analysis — overview of all trials (only max 5 rows displayed).
- Drug Analysis
 - Trial Count by Drugs and Phase — number of trials per drug grouped by phase.
 - Trial Enrollment by Drugs and Phase — number of trials per drug grouped by phase.
- Sponsor Analysis
 - Top 10 Leading Sponsors — trial count (ongoing) for top 10 commercial sponsors.
 - Enrollment Distribution by Phase and Sponsors — total enrollment per sponsor grouped by phase.
 - Trial Count by Phase and Sponsors — number of ongoing, commercial trials per sponsor grouped by phase.
- Geography Analysis
 - Trials by Economic Block — number of recruiting commercial trials per economic block.
 - Trials by Country — number of ongoing trials per country.
 - Sites Opened by Economic Block — recruiting sites since 2015 by region.
 - Sites Opened in Last 2 Years — trend of site openings for commercial trials.
- Enrollment Analysis
 - Enrollment Target by Phase — total enrollment target per phase.
 - Enrollment Target by Economic Block — enrollment distribution per region.
 - Enrollment Target - USA (All Trials) — enrollment distribution across US states.
 - Enrollment Target - USA (Recruiting) — enrollment distribution across US states.
 - Enrollment Target - Europe (All Trials) — enrollment distribution across Europe.
 - Enrollment Target - Europe (Recruiting) — enrollment distribution across Europe.
 - Relative Enrollment per Million Inhabitants — enrollment density across countries.
- Country Ranking — Comprehensive country ranking for clinical trial activity.

Tip: Click the information icon (i) on any chart card to view a description of what that chart measures.

Site Tier Explained:

Site Tier categorizes sites independent of indication and considers the overall clinical trial activity that takes place at a site. Site tiers identify the expected site type, size, and importance level, and range from 1 to 5 – with Tier 1 sites as leading sites, and Tier 5 sites as very small sites with no trials started in the past 3 years. Sites in between reflect the full spectrum of experience levels across the global research landscape.

For a full description of Site Tier, see Appendix A.

5. Site Selection Module

The Site Selection module helps you identify optimal clinical trial sites for your study. It uses trial phase, geographic, and sponsor experience filters to surface relevant sites, and presents the results through histograms, global distribution maps, and economic-block comparisons.

5.1 Setting Site Selection Filters

From the Dashboard, click Select under the Site Selection card. You will be taken to the Site Selection filter page.

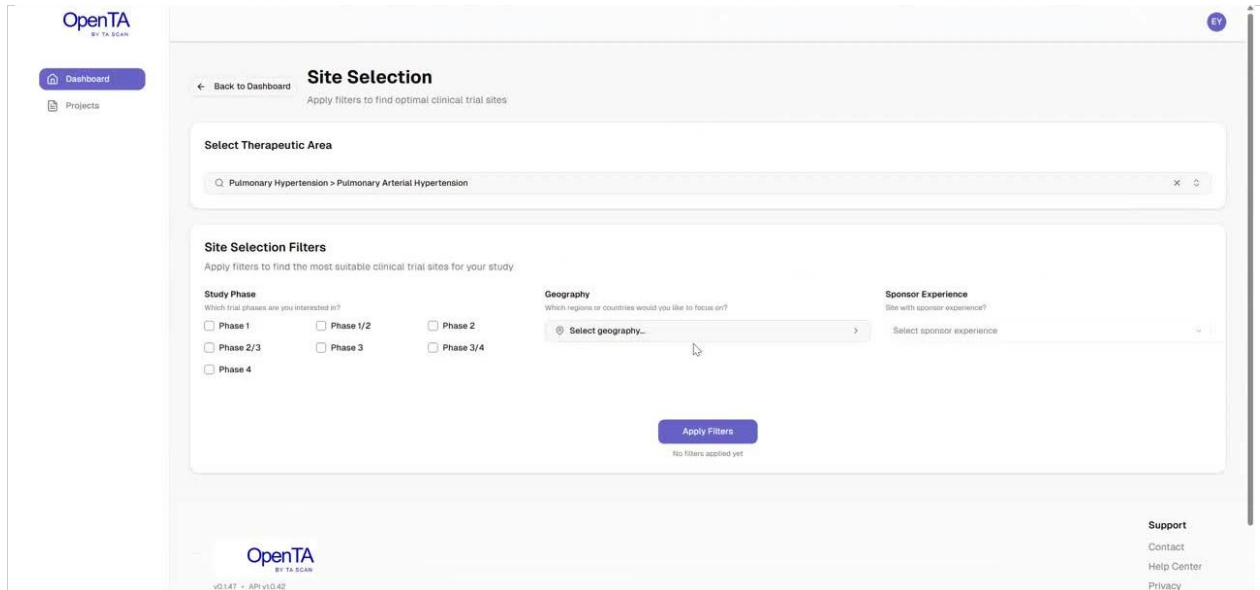


Figure 10 – Site Selection filter page

Study Phase

Select the trial phases relevant to your study (Phase 1 through Phase 4 and all combinations). This determines which site types are included in the analysis.

Geography

Click the Geography field to open the hierarchical location picker. Select economic blocks, sub-regions, or individual countries. You can select multiple geographies; the selected locations will appear as tags at the bottom of the picker.

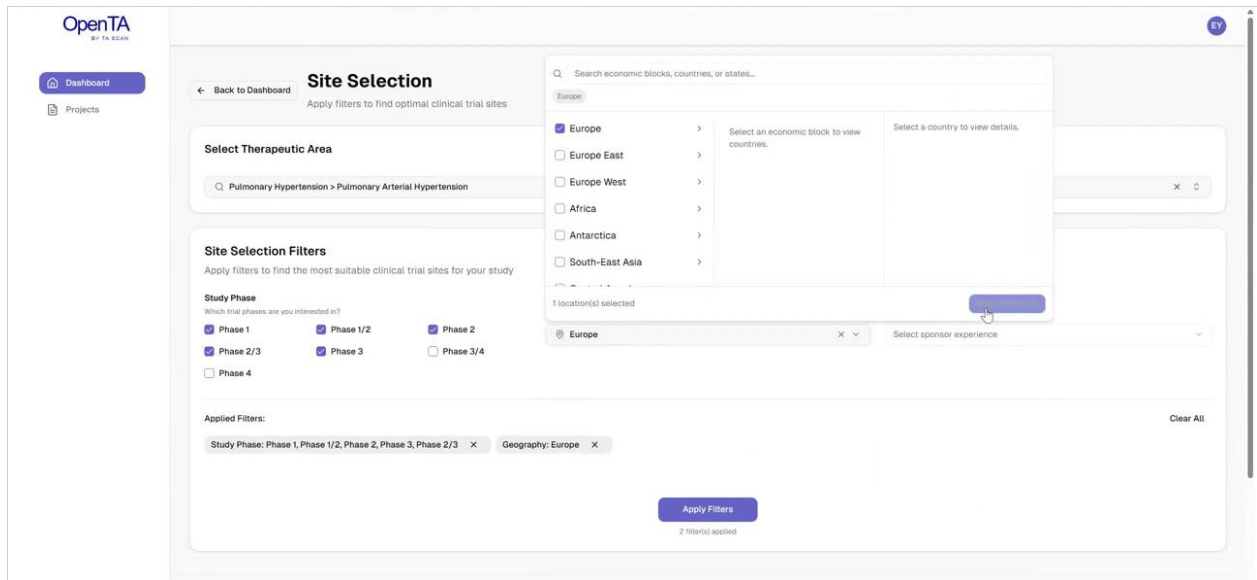


Figure 11 – Geography picker with hierarchical region selection

Sponsor Experience

Use the Sponsor Experience dropdown to filter sites by whether they have prior experience with commercial or academic sponsors.

- 1 Set your Study Phase, Geography, and Sponsor Experience filters.
- 2 Review the Applied Filters summary bar at the bottom to confirm your selections.
- 3 Click Apply Filters to generate the Site Selection results.

5.2 Reading Site Selection Results

The Site Selection Results page presents a range of visualizations to help evaluate potential trial sites across your selected geography and phase criteria.

Summary Cards

At the top of the results page you will find two headline metrics:

- Investigators — total number matching your criteria.
- New Trials — recently started trials involving these investigators.

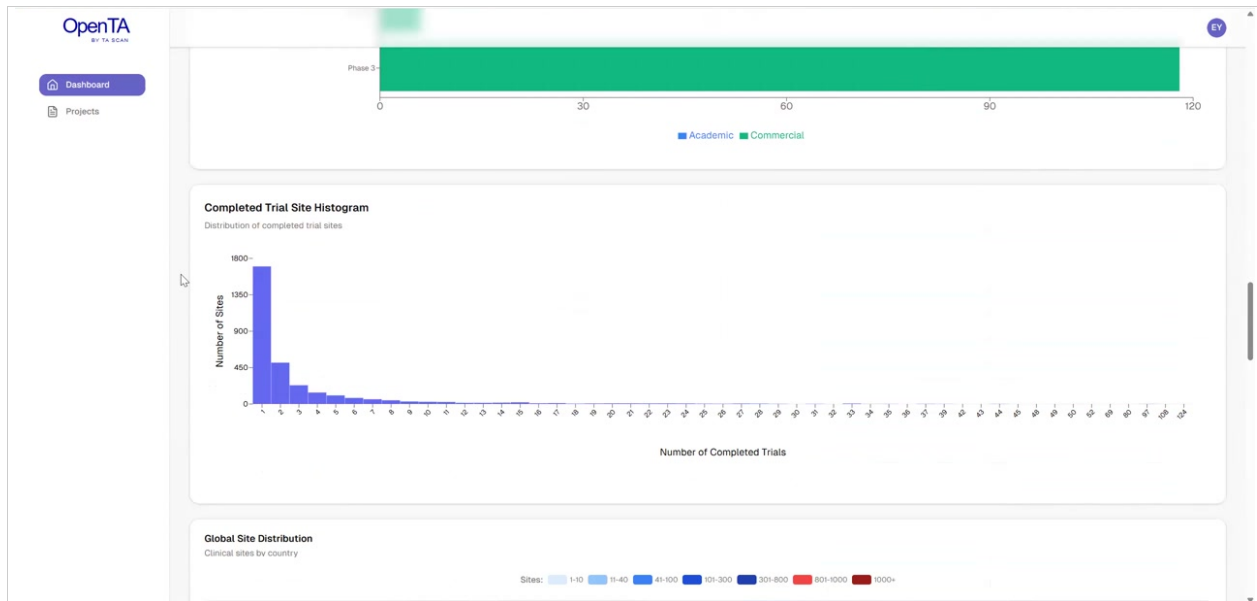


Figure 12 – Site Selection Results: Completed Trial Site Histogram

Available Charts

- Site Distribution by Tier — distribution of sites across different size tiers.
- Trial Phase Distribution — distribution of trials across different phases.
- Trial State Distribution — distribution of trials by recruitment state.
- Top Experimental Drugs — top 10 experimental drugs by trial count.
- Sites Opened by Economic Block — recruiting sites since 2015 across economic regions.
- Trials by Sponsor Type and Phase — distribution of trials by commercial and academic sponsor type per phase.
- Completed Trial Site Histogram — distribution of sites by number of completed trials.
- Global Site Distribution — map and chart of clinical sites by country, colour-coded by site count tiers (1–10, 11–40, 41–100, etc.).
- Sites Opened in Last 2 Years — recent site opening trends by country.
- Country Ranking — Comprehensive country ranking for site selection.
- All Sites — detailed listing of all clinical trial sites (only max 5 rows displayed).

Site Tier Explained:

Site Tier categorizes sites independent of indication and considers the overall clinical trial activity that takes place at a site. Site tiers identify the expected site type, size, and importance level, and range from 1 to 5 – with Tier 1 sites as leading sites, and Tier 5 sites as very small sites with no trials started in the past 3 years. Sites in between reflect the full spectrum of experience levels across the global research landscape.

For a full description of Site Tier, see Appendix A1.

6. Investigator ID Module

The Investigator ID module helps you identify and evaluate potential principal investigators for your clinical trials. It uses geography, sponsor experience, and network size filters to surface relevant investigators, and presents data on their activity, publications, presentations, and sponsor relationships.

6.1 Setting Investigator ID Filters

From the Dashboard, click Select under the Investigator ID card. You will be taken to the Investigator ID filter page.

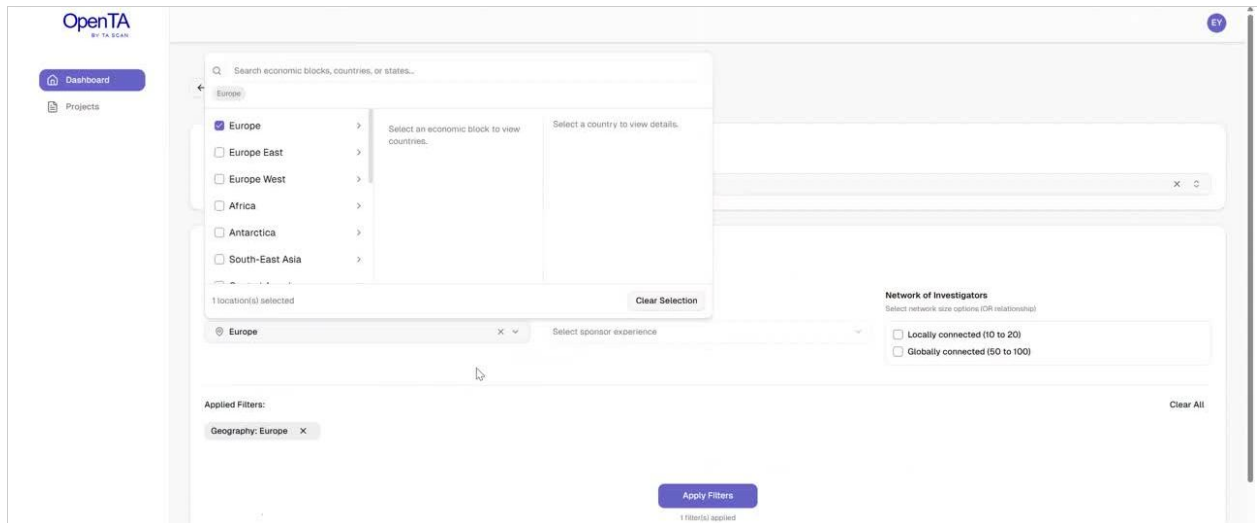


Figure 13 – Investigator ID filters: Geography picker and Network of Investigators

Geography

Use the Geography picker to select the economic blocks or countries where you wish to find investigators. The picker works identically to the one in the Site Selection module.

Sponsor Experience

Filter for investigators with prior commercial or academic sponsor experience using the Sponsor Experience dropdown.

Network of Investigators

Select a network size category to focus on investigators with a certain level of professional connectivity:

- Locally connected (10 to 20 connections)
- Globally connected (50 to 100 connections)

1 Select your Geography, Sponsor Experience, and Network Size filters.

2 Review the Applied Filters summary at the bottom of the page.

3 Click Apply Filters to generate Investigator ID results.

6.2 Reading Investigator ID Results

The Investigator Selection Results page shows a summary of investigators matching your criteria, along with rich analytical charts.

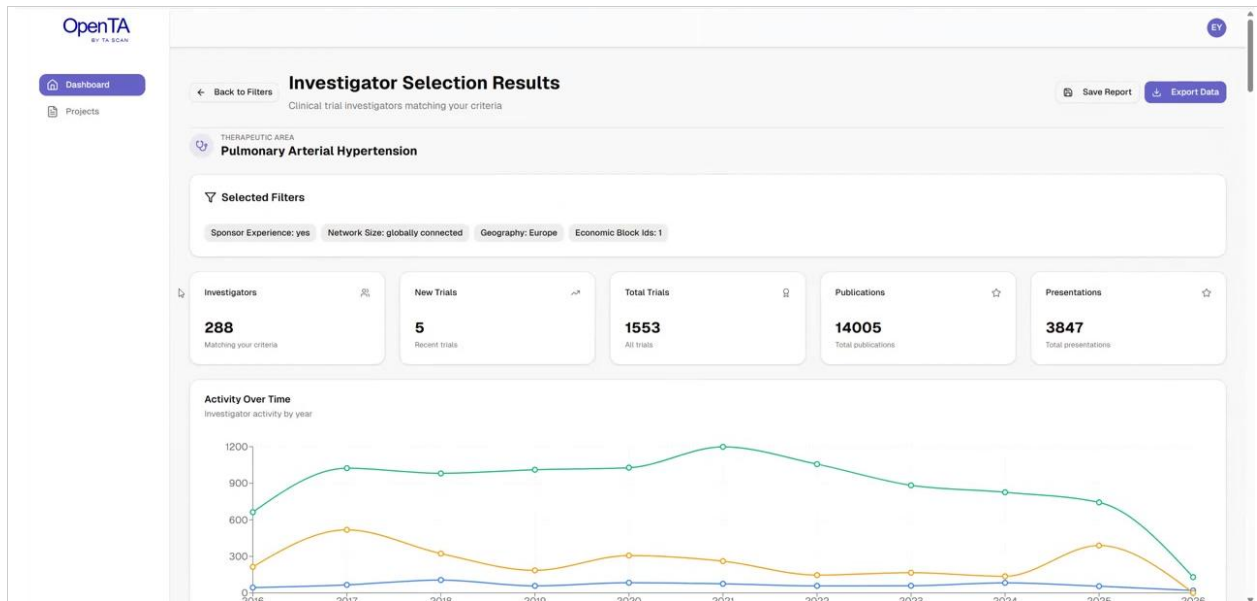


Figure 14 – Investigator Selection Results: summary cards and Activity Over Time chart

Summary Cards

At the top of the results page you will find five headline metrics:

- Investigators — total number matching your criteria.
- New Trials — recently started trials involving these investigators.
- Total Trials — all trials across all states.
- Publications — total number of publications from matching investigators.
- Presentations — total number of presentations.

Available Charts

- Activity Over Time — investigator activity (trials, publications, presentations) by year.
- Global Investigator Distribution — investigators by country.
- Investigator Analysis — detailed comparison of potential clinical trial investigators (max 5 rows displayed).
- Scores of Top investigators — score breakdown for top investigators.
- Trial Phase Distribution — distribution of trials by phase.
- Trial State Distribution — distribution of trials by state.
- Country Spread — distribution by economic block.
- Global Connections — distribution of global connections.
- Investigators by Economic Block — number of investigators per region.
- Trial Count by Indication — trial count per indication.
- Trial Types — trial type distribution.

- Top Commercial Sponsors — top sponsors by trial count
- Completed Trial Investigator Histogram — distribution of investigators by number of completed trials.

Investigator score explained:

Each investigator in OpenTA is assigned four individual scores. Publication Score, Presentation Score, and Trial Score are shown per therapeutic area, meaning they reflect the investigator's activity specifically within the indication you have selected. The Fee Disclosures score is independent of the indication.

All scores are each reported on a scale of 1 to 5, where 5 is the highest. They are calculated from publicly available data sources including clinical trial registries, PubMed, and conference databases. Exact scoring formulas are proprietary to Anju Software.

For a full description of Investigator Scores, see Appendix A3.

7. Saving Reports & Exporting Data

Every module in OpenTA — Landscape, Site Selection, and Investigator ID — allows you to save the results of your analysis for future reference. Saved reports are stored in Projects and can be reopened as a static snapshot or refreshed with live data at any time.

7.1 Saving a Report

The Save Report button is available in the top-right corner of every results page (Landscape Results, Site Selection Results, and Investigator Selection Results). The workflow is identical across all three modules.

- 1 Click Save Report in the top-right corner of any results page.
- 2 In the Save Report dialog, choose to create a New Project or select an existing project from the dropdown.
- 3 If creating a new project, enter a Project Name and an optional Project Description.
- 4 Enter a Report Name (required). Use a descriptive name such as "PAH Phase 1-3 Landscape Q1 2026".
- 5 Optionally add a Description to note the purpose or context of this report.
- 6 Review the Report Summary in the dialog — it confirms the module type, number of visualisations included, and number of filters applied.
- 7 Click Save Report. A confirmation notification will appear and the report will be accessible from the Projects section.

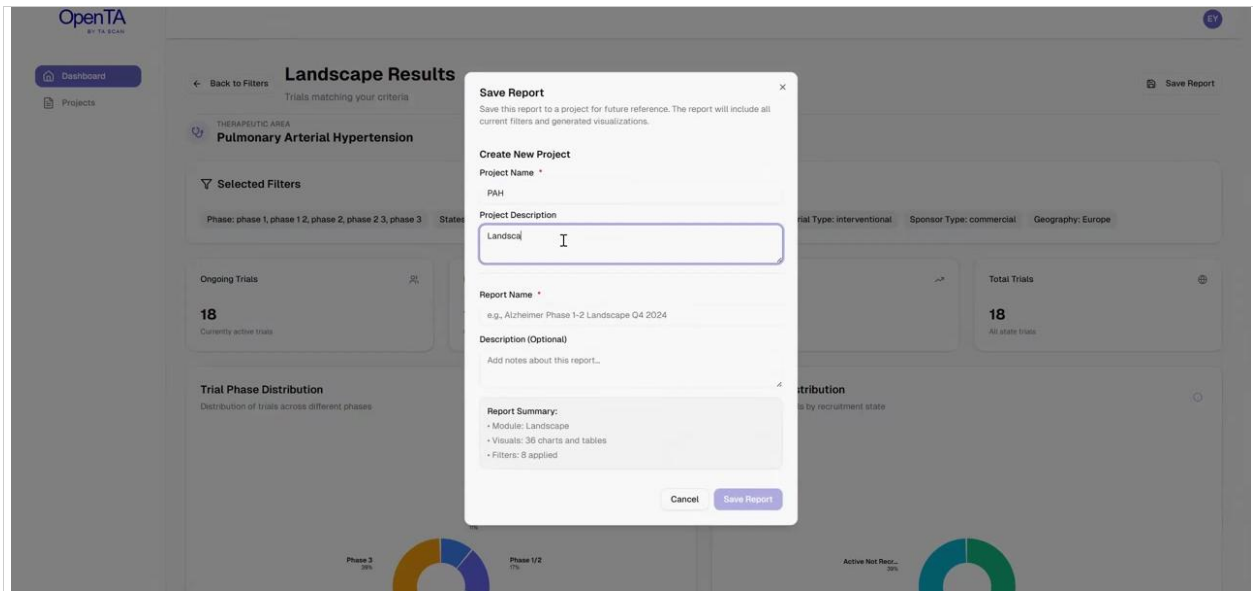


Figure 9 – Save Report dialog (Landscape module shown; workflow is identical for Site Selection and Investigator ID)

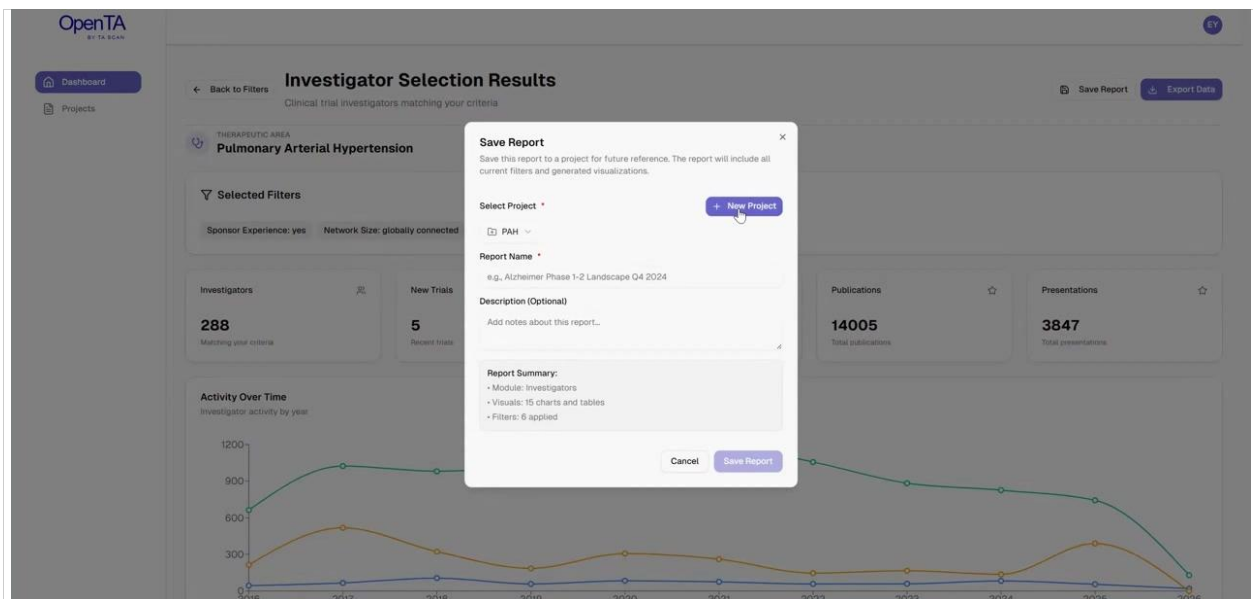


Figure 10 – Save Report dialog showing an existing project selected (Investigator ID module)

Tip: You can save multiple reports with different filter combinations into the same project. This makes it easy to compare scenarios side by side — for example, saving a European Phase 1-3 PAH landscape alongside a global Phase 3-only version in the same project folder.

7.2 Exporting Data

The Investigator ID module includes an Export Data option in addition to the Save Report function. This allows you to download the underlying investigator data as a file for use in external tools such as Excel or your CRM.

- 1 Run your Investigator ID analysis and review the results page.
- 2 Click Export Data in the top-right corner of the Investigator Selection Results page (next to Save Report).
- 3 The data file will download automatically to your browser's default download location.

Note: Export Data is currently available in the Investigator ID module. Landscape and Site Selection results can be saved as reports within OpenTA and revisited at any time via the Projects section.

8. Projects

The Projects section is your personal library of saved reports. All reports saved from the Landscape, Site Selection, and Investigator ID modules are stored here, organised by project.

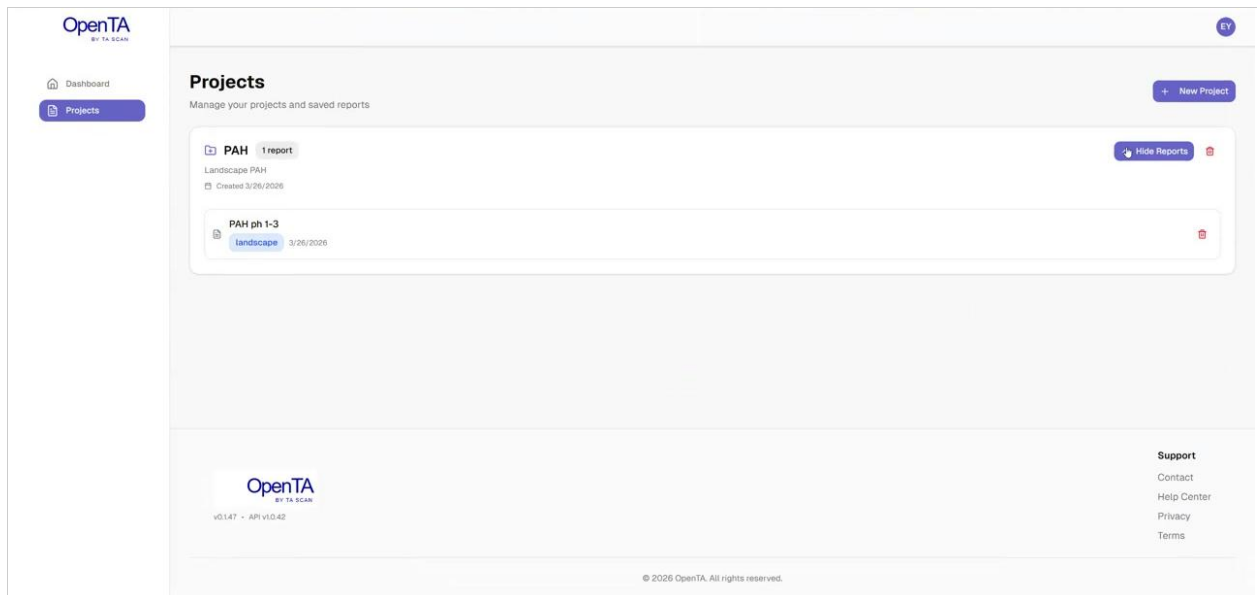


Figure 11 – Projects page with a saved Landscape report

8.1 Viewing Saved Reports

- 1 Click Projects in the left sidebar to open the Projects page.
- 2 Projects are listed with their name, description, and creation date. Each project shows the number of reports it contains.
- 3 Click View Reports (or Hide Reports) on a project card to expand or collapse the list of reports within that project.
- 4 Click on a report name to open it. You will be given two options: open the saved snapshot or re-run the query with refreshed data.

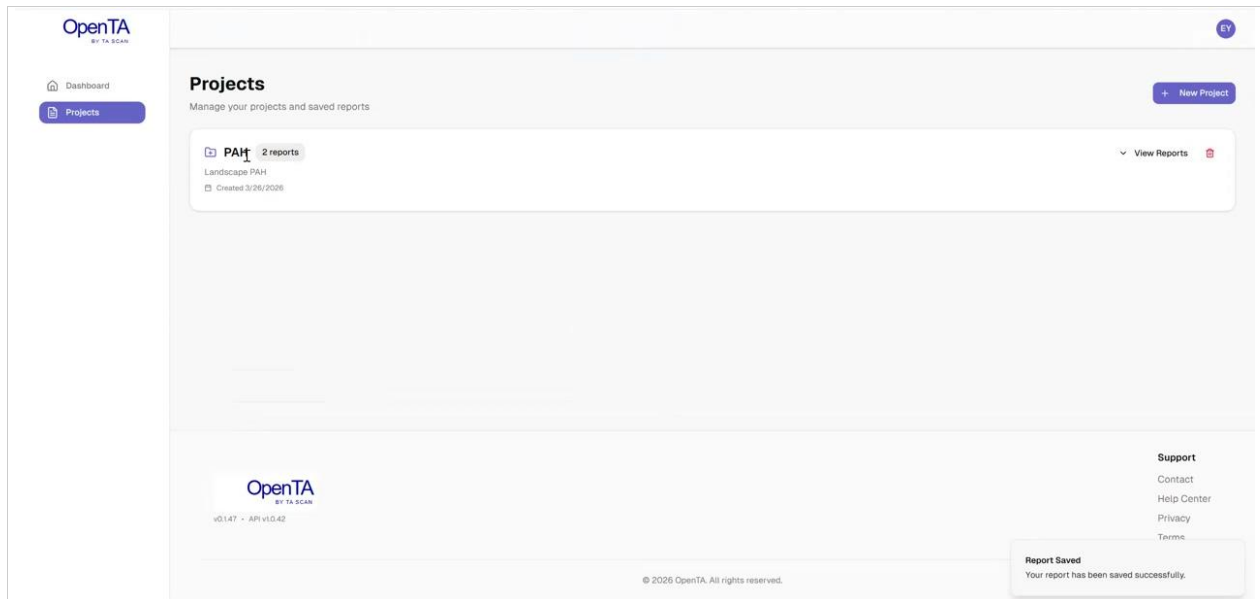


Figure 12 – Projects page showing a project with two saved reports and confirmation toast

Snapshot vs. Re-run

When you open a saved report, OpenTA gives you two ways to view it:

Option	What it does
Open Snapshot	Opens the report exactly as it was saved — same filters, same charts, same numbers. This is a static view of the data at the time of saving, ideal for presentations, audit trails, or comparing against a baseline.
Re-run Query	Re-applies the saved filters against the latest data and generates a fresh set of results. Use this when you want to see how the landscape, site activity, or investigator pool has changed since the report was first saved.

Tip: Use Open Snapshot to share a fixed view with colleagues or stakeholders. Use Re-run Query when you want to check whether new trials, sites, or investigators have entered the picture since your last analysis.

8.2 Creating a New Project

You can create a project directly from the Projects page without first running a report.

- 1 Click + New Project in the top-right corner of the Projects page.

- 2 Enter a project name and optional description, then confirm.

8.3 Deleting a Report or Project

To delete an individual report, click the red trash icon next to the report in the expanded project view. To delete an entire project, click the trash icon next to the project name.

Warning: Deleting a project will permanently remove all reports within it. This action cannot be undone.

9. Tips & Troubleshooting

9.1 General Tips

- Start broad, then narrow. Begin with fewer filters to see the full picture before applying phase or geography restrictions.
- Use Applied Filters tags. The filter summary bar at the bottom of every filter page lets you quickly remove individual criteria without resetting all filters.
- Save regularly. Reports are not automatically saved. Use Save Report after reviewing results you want to retain.
- Use Projects to compare scenarios. Save multiple reports with different filter combinations into the same project for easy side-by-side comparison.

9.2 Troubleshooting

Issue	Resolution
Charts are not loading	Refresh the page. Ensure you have an active internet connection. Try a different supported browser.
No results returned after applying filters	Your filter combination may be too restrictive. Try removing one or more filters (e.g., expand the phase selection or remove the geography filter).
Forgot password	Click Forgot password? on the login page to receive a reset email at your registered address.
Report not appearing in Projects	Ensure you clicked Save Report and completed all required fields (Project Name and Report Name) in the dialog before clicking Save Report.
Page displays an error	Clear your browser cache and reload the page. If the issue persists, contact support at openta.anjudp.com .

9.3 Support

For additional assistance, access the Help Center or contact the OpenTA support team through the Support links in the footer of any page:

- **Help Center:** openta.anjudp.com/help
- **Contact:** openta.anjudp.com/contact
- **Privacy Policy:** openta.anjudp.com/privacy

Appendix A. Understanding Site Tiers, Scores & Rankings

OpenTA uses a scoring and tiering framework — powered by the TA Scan data engine — to help users compare and prioritise clinical trial sites. This appendix explains what the scores and tiers represent and how to interpret them in your analysis. Exact scoring formulas are proprietary to Anju Software.

A.1 Site Tiers

Every clinical trial site in OpenTA is assigned a Tier from 1 to 5. The tier reflects a site's overall level of clinical trial activity and experience, based on its historical participation across completed trials within the therapeutic area.

Tier 1 sites are the most active and experienced — high-volume research centres with a strong, sustained track record in clinical trials. Tier 5 sites have had more limited trial activity in the data. Sites in between reflect the full spectrum of experience levels across the global research landscape.

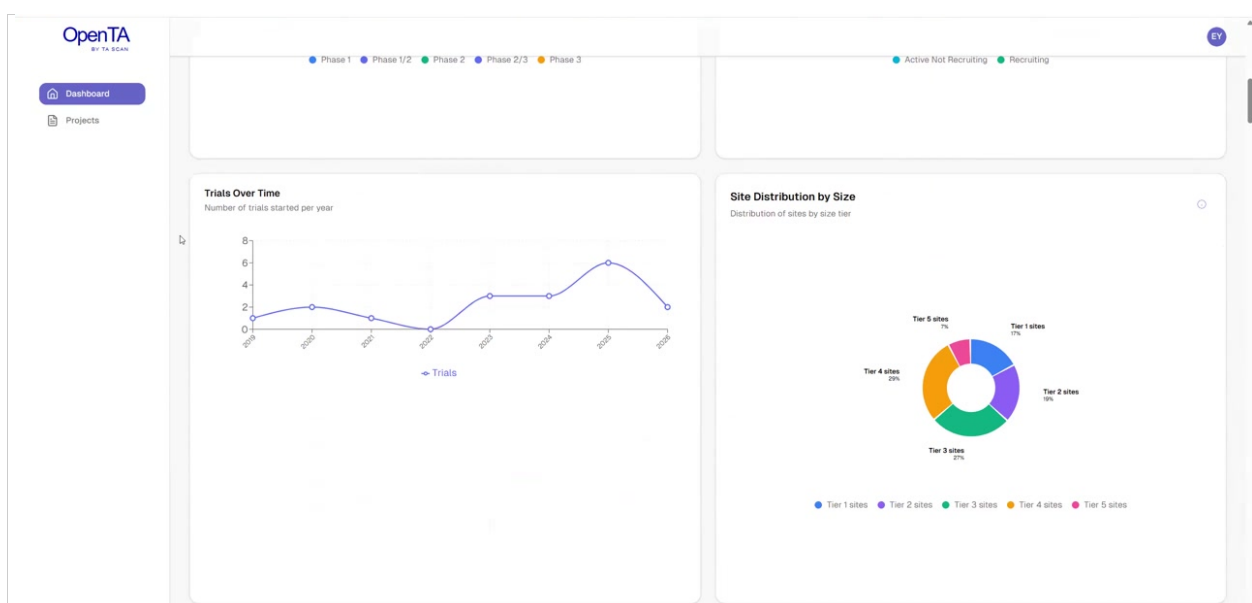


Figure A1 – Site Distribution by Size donut chart (Landscape module), showing the proportion of Tier 1–5 sites matching the selected therapeutic area and filters

Tier	Activity Level	What it means for your study
Tier 1	Highest activity	Top-performing research centres with extensive trial history. These sites typically have established infrastructure, experienced staff, and strong patient recruitment pipelines. Well-suited for complex or high-priority studies.
Tier 2	High activity	Sites with a strong and consistent track record. Reliable performers that balance experience with availability.
Tier 3	Moderate activity	Sites with solid participation in clinical trials. Good candidates to consider alongside Tier 1–2 sites, particularly in geographies where higher-tier options are limited.

Tier	Activity Level	What it means for your study
Tier 4	Lower activity	Sites with limited but notable trial experience. May be suitable for broadening geographic reach or for therapeutic areas where global top sites are few.
Tier 5	Emerging / limited activity	Sites with minimal recorded trial activity in the therapeutic area. May represent newer or niche research centres. Appropriate mainly when expanding to underserved regions or building a broader site network.

Note: Tiers are calculated relative to completed trial participation within the therapeutic area you have selected. A site that is Tier 1 in oncology may be Tier 3 in a rare disease indication — the tier always reflects activity in your specific context.

A.2 Where Tiers Appear in OpenTA

Site tiers appear in two places within OpenTA:

- **Landscape module** — The Site Distribution by Size donut chart breaks down the proportion of Tier 1 through Tier 5 sites associated with your filtered trials. This gives you a quick read on whether the competitive landscape is dominated by high-experience sites or spread across a broader range.
- **Site Selection module** — The Completed Trial Site Histogram shows how sites are distributed by the number of completed trials, giving you a practical view of site experience depth within your selected geography and phase criteria.

A.3 Investigator Scores & Rankings

Each investigator in OpenTA is assigned four individual scores. Publication Score, Presentation Score, and Trial Score are shown per therapeutic area, meaning they reflect the investigator's activity specifically within the indication you have selected. The Fee Disclosures score is independent of the indication.

All scores are each reported on a scale of 1 to 5, where 5 is the highest. They are calculated from publicly available data sources including clinical trial registries, PubMed, and conference databases. Exact scoring formulas are proprietary to Anju Software.

Score	Scale	What it measures & how to interpret it
Publication Score	1 - 5	Reflects the volume and recency of PubMed-indexed publications the investigator has authored in the therapeutic area. A score of 5 indicates a highly prolific publisher — strong academic credibility and scientific visibility in the indication. A lower score may reflect a more clinically focused investigator rather than an academic one.
Presentation Score	1 - 5	Reflects the number of conference presentations attributed to the investigator within the therapeutic area. A score of 5 signals an investigator who is actively present at major scientific meetings — well-networked and influential in the

Score	Scale	What it measures & how to interpret it
		clinical community. A lower score does not disqualify a candidate but may indicate less conference activity.
Trial Score	1 - 5	Reflects the depth of the investigator's clinical trial participation in the therapeutic area — spanning ongoing, completed, and halted studies. A score of 5 indicates extensive and sustained trial engagement. This is often the most operationally relevant score when assessing site selection and recruitment capability.
Fee Disclosure Score	1 - 5	Reflects the amount of recorded financial disclosures the investigator has made — for example, payments from pharmaceutical companies as reported in public transparency databases such as the U.S. Sunshine Act (Open Payments). A high score indicates an investigator with strong commercial sponsor relationships and frequent advisory or consultancy engagements. A count of 0 may reflect an investigator in a geography or indication where fee disclosure data is not publicly available, rather than an absence of sponsor activity.

Tip: No single score tells the full story. An investigator with a Trial Score of 5 but a lower Publication Score may be a highly experienced clinical operator who is less academically focused — and could be exactly the right fit for an operationally complex study. Use the three scores together, alongside Fee Disclosures and Network Size, to build a well-rounded picture.

Score Scale Reference

All four scores (Publication, Presentation, Trial) use the same 1–5 scale:

Score	General interpretation
5	Highest activity — among the most active investigators in this therapeutic area. A top-tier candidate for high-priority or complex studies.
4	High activity — strong track record with consistent engagement across publications, presentations, or trials.
3	Moderate activity — solid contributor with meaningful experience. A reliable candidate, particularly in geographies with fewer high-scoring investigators.
2	Lower activity — limited recorded activity in this therapeutic area. May be earlier in career or transitioning into the indication.
1	Minimal activity — very limited data available for this investigator in this therapeutic area. Consider carefully before selecting.

Note: Scores are always calculated within the context of the therapeutic area you selected on the dashboard. The same investigator may have different scores across different therapeutic areas, reflecting their specific activity in each indication.

A.4 Network Size Categories

When filtering in the Investigator ID module, investigators can be grouped by network size — a measure of how broadly connected they are within the clinical research community, based on co-investigator relationships in trial registries.

Category	What it signals
Locally connected (10-20)	Investigators who collaborate primarily within a regional or institutional network. Well-suited for studies targeting a specific country or site cluster.
Globally connected (50-100)	Investigators with an extensive international network. These are often KOLs (Key Opinion Leaders) or experienced multi-centre trial coordinators. Ideal for global or multi-regional studies.

Note: Network size data is derived from co-investigator relationships recorded in public trial registries. It reflects professional trial connections, not publication co-authorship.