

How to Import Subject Data

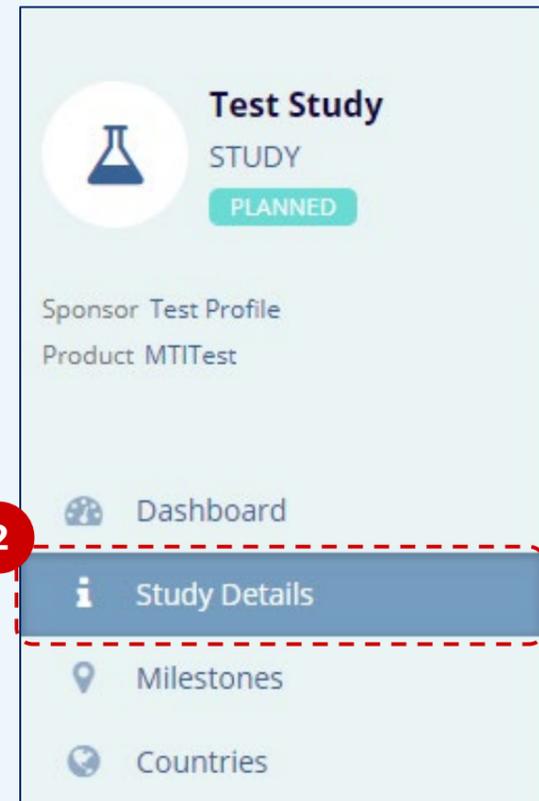
CTMS version 3.0

APPLICABLE TO:

- Company Admin
- Study Manager
- CRA

1 Log into the CTMS, navigate to the study to which you would like to import subject data.

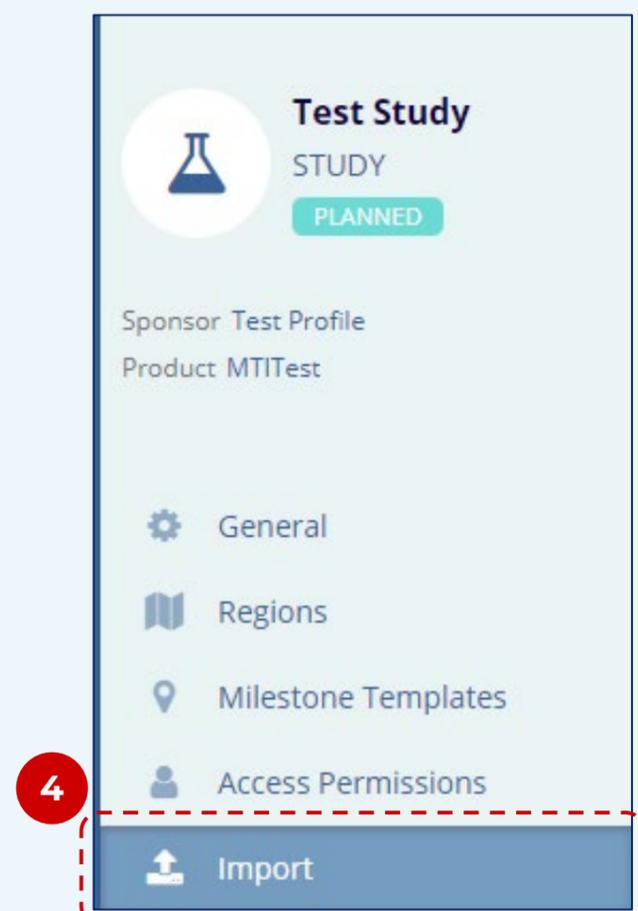
2 Navigate to the **Study Details** area using the navigation links at the left.



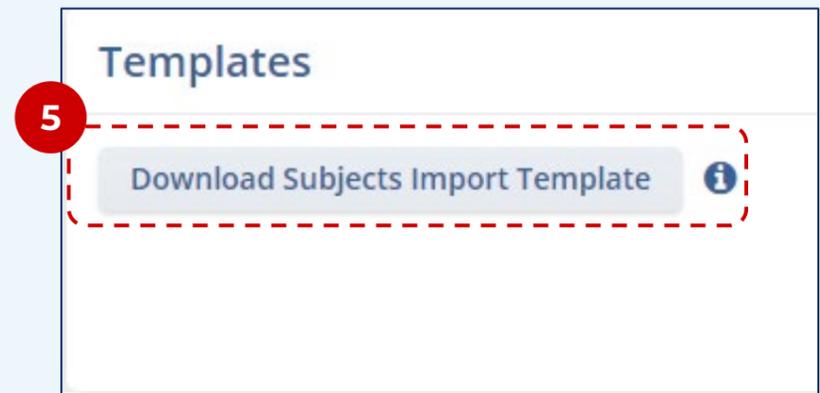
3 Press the **Settings** button at the top-right corner of the screen.



4 Select the **Import** option from the navigation links at the left.



- 5 Using the link displayed, download the **Subjects Import Template** if you have not already done so.

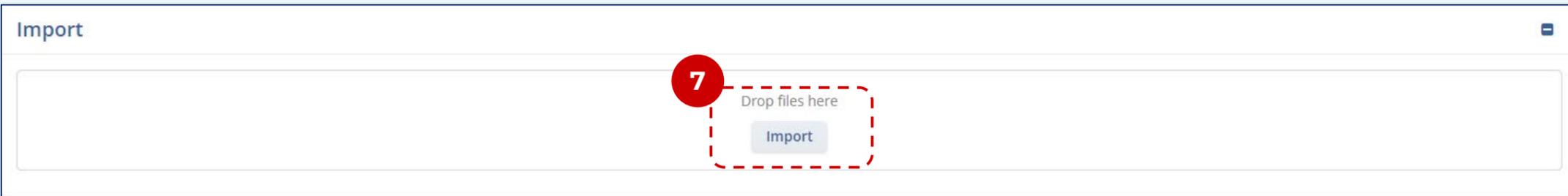


- 6 Enter the data to be imported onto the template downloaded in step 5.

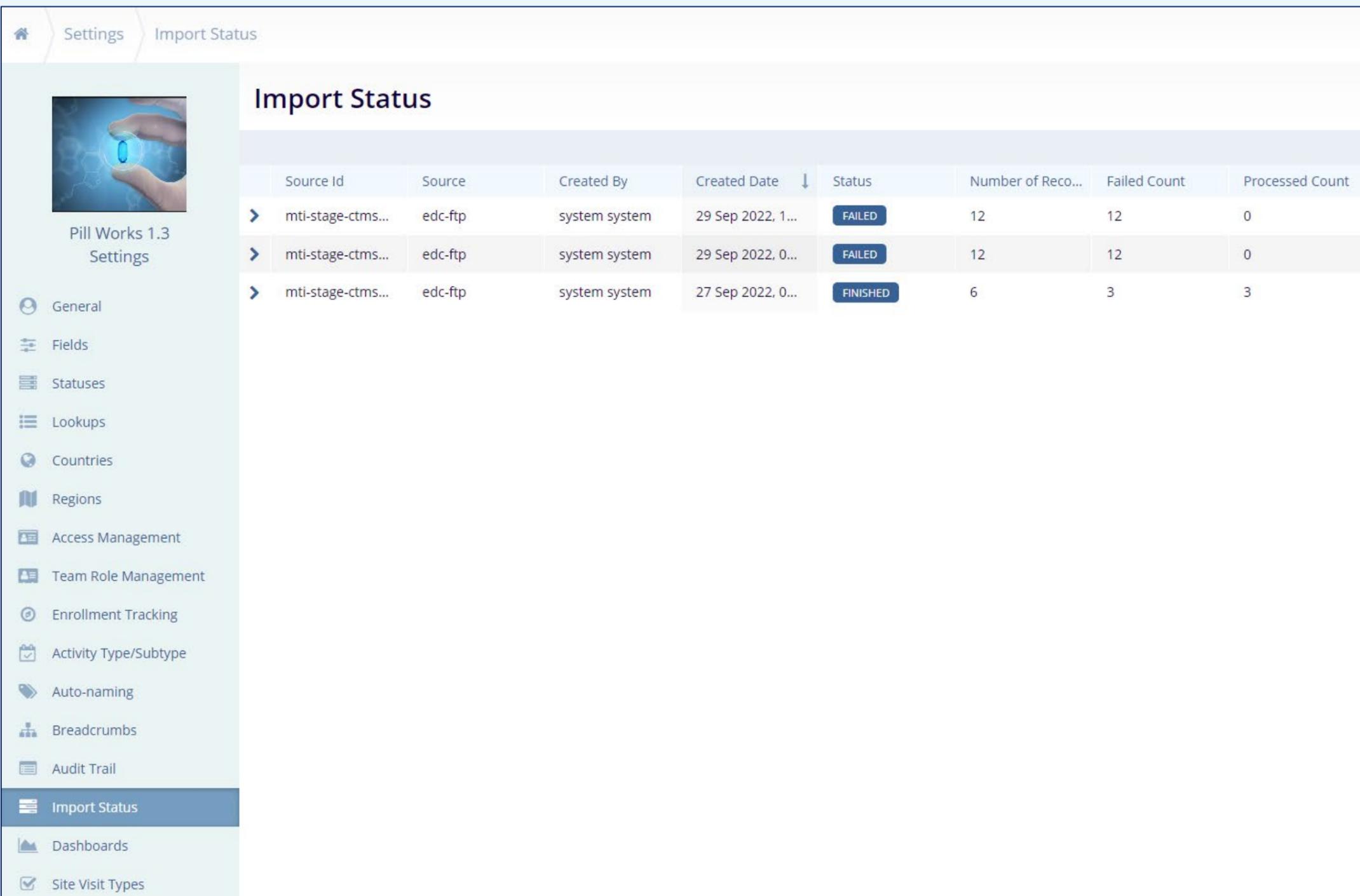
Here are some general tips/info about filling out the template:

- Imported data can be new subject entries or changes to existing subjects.
- Multiple changes to one subject may be imported on the same spreadsheet.
- When updating an existing subject, make sure that the Subject Number, Site Number, etc. are correct so that a new subject is not generated.
- The import file must be in .xlsx format when uploaded.
- The import file must have a site number (Column G) or it will fail.
- To import something new, you need to at least have the Subject ID, correct Site Number of a Site located in the Study, Current Status and Status Date in the correct format on the Subjects tab.
- To update an existing record, the Subject ID and Site Number must be provided.
- The Subject Import function is additive only. The CTMS will not delete information from the subject record if it is not present in the file.
- All entries must conform to the requirements for the import template. Incorrectly formatted data will not upload successfully.

7 Either press the **Import** button or drag and drop the file into the Import area.



8 Company Administrators may navigate to the Settings area and select the **Import Status** option to view the status of import attempts.



9 The status of the import may be tracked from the 'Import Status' area in the navigation links at the left side of the screen.

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| Source Id | Source | Created By | Created Date ↓ | Status | Number of Recor... | Failed Count | Processed Count | Transaction Id | Destination Id | Destination Type |
|--------------------|-------------|--------------|--------------------|----------|--------------------|--------------|-----------------|----------------|----------------|------------------|
| imports/mti_sta... | file_import | Steven Clark | 10 Oct 2023, 03... | FINISHED | 1 | 0 | 1 | 01HCDKH23Z2... | 01HA7FAB1TM... | Study |