

- APPLICABLE TO:
- ☒ Company Admin

☒ Study Manager

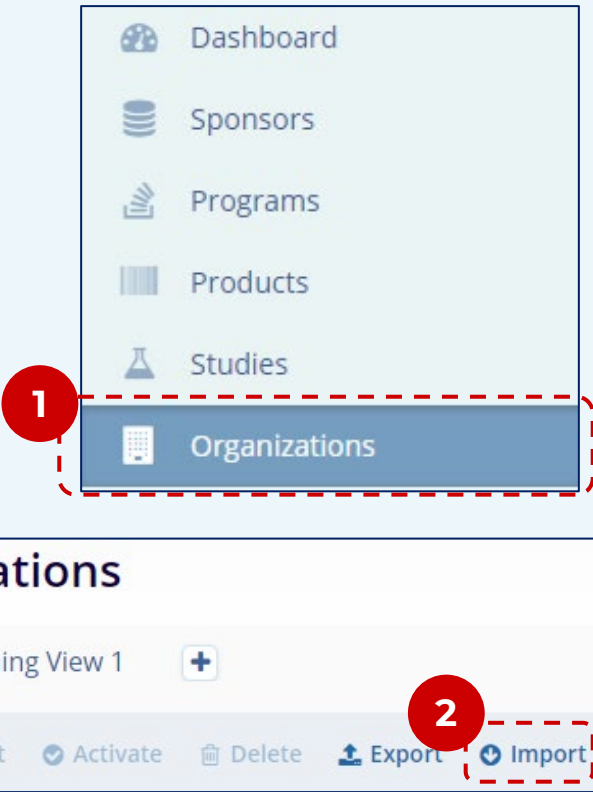
☐ CRA

Maintaining global records aids users in that it removes both the need for repeated entry of the same information where an entity is used multiple times, and also removes the risk of errors associated with repeated manual entry.

- 1

Log into the CTMS, navigate to the **Organizations** area via the navigation links at the left side of the screen.
- 2

Press **Import** in the menu above the list of contacts.



- 3

Press **Download Template** in the Import window that opens.

Note: Both the 'Import' window and the Template document have extensive instructions for how data should be entered. Be sure to follow these instructions in order to help ensure the success of your upload.

- 4

Drag the completed file for upload into the box and click **Import**.

