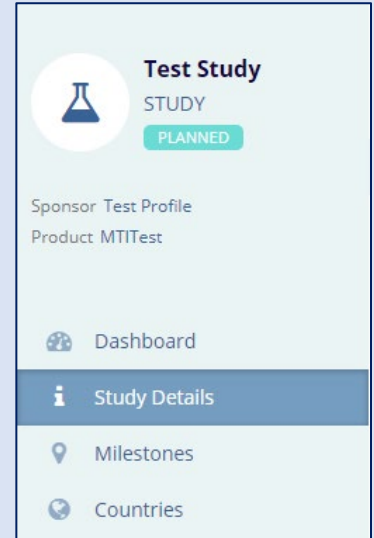**T R I A L INTERACTIVE**

APPLICABLE TO:
- ● Company Administrator
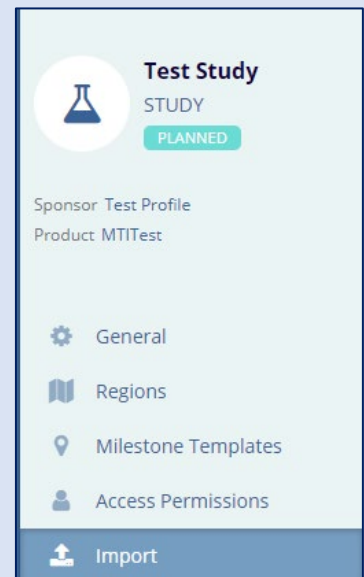- ● Study Manager
- ○ CRA
- ● CTMS

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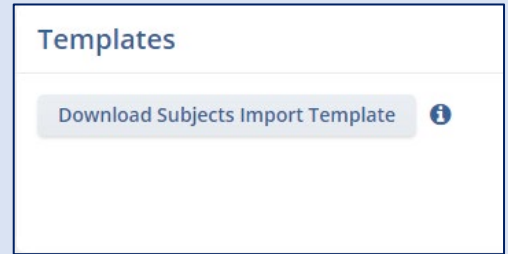
3. Press the **Settings** button at the top-right corner of the screen.

⚙ Settings

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

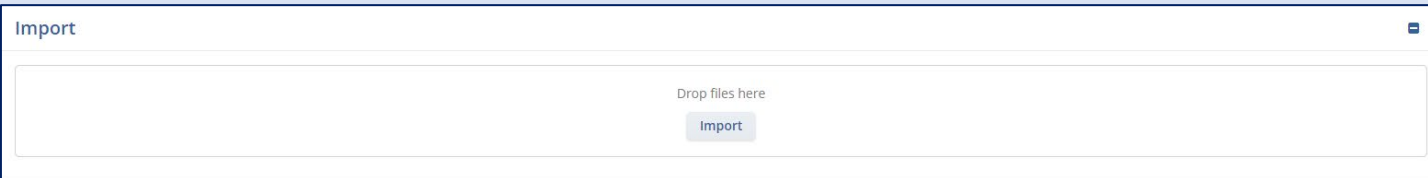5. Using the link displayed, download the **Subjects Import Template** if you have not already done so.

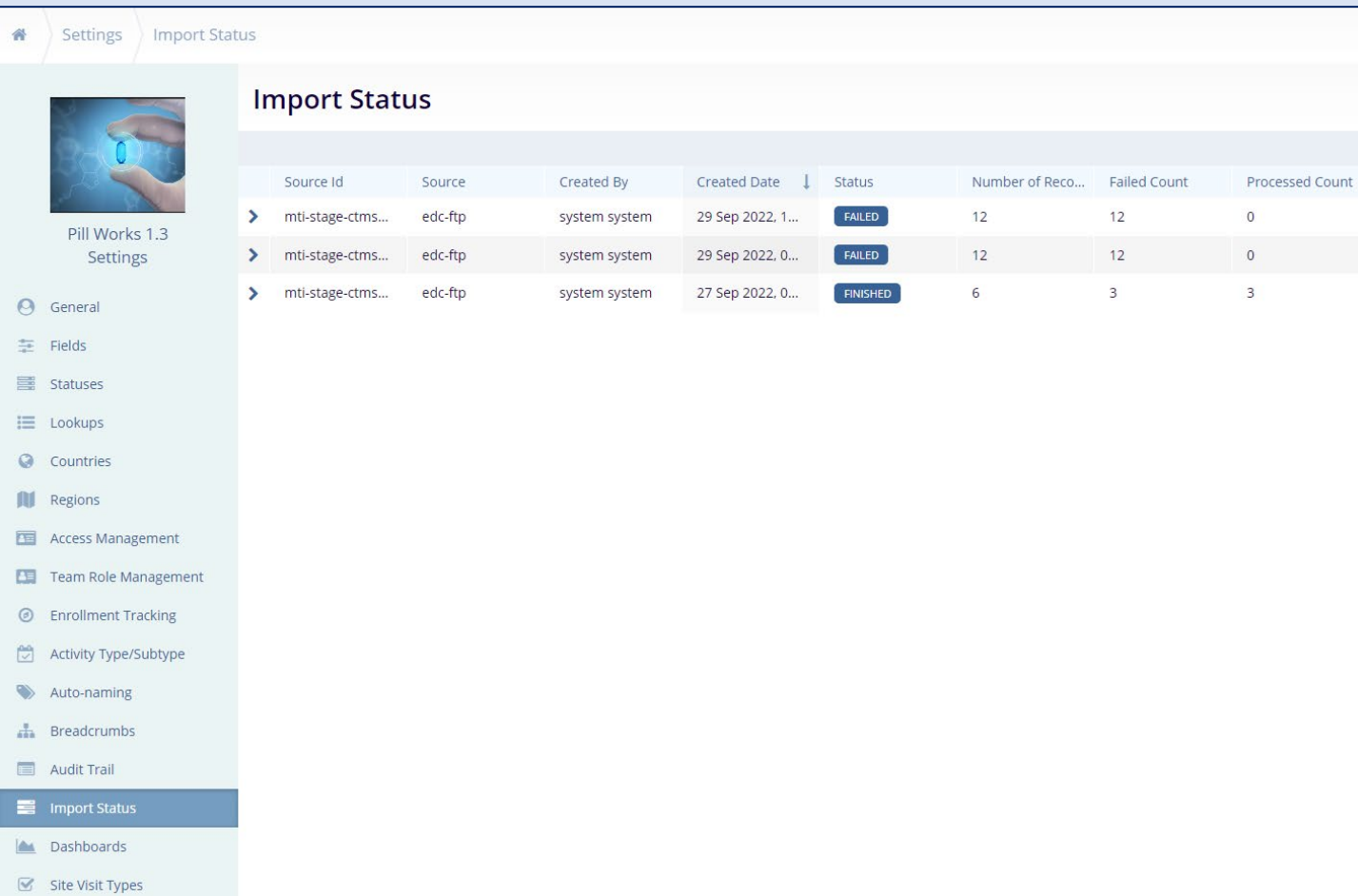6. Enter the data to be imported onto the template downloaded in step 5.

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.

T R I A L INTERACTIVE

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

Import

Drop files here

Import

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

Settings › Import Status

Pill Works 1.3 Settings

- General
- Fields
- Statuses
- Lookups
- Countries
- Regions
- Access Management
- Team Role Management
- Enrollment Tracking
- Activity Type/Subtype
- Auto-naming
- Breadcrumbs
- Audit Trail
- Import Status
- Dashboards
- Site Visit Types

Import Status

Source Id	Source	Created By	Created Date	Status	Number of Reco...	Failed Count	Processed Count
mti-stage-ctms...	edc-ftp	system system	29 Sep 2022, 1...	FAILED	12	12	0
mti-stage-ctms...	edc-ftp	system system	29 Sep 2022, 0...	FAILED	12	12	0
mti-stage-ctms...	edc-ftp	system system	27 Sep 2022, 0...	FINISHED	6	3	3