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## **TRANSPERFECT**

## T R I A L INTERACTIVE

## How to Import Subject Data CTMS v 1.6

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

Templates	
Download Subjects Import Template	0

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.



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# 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.

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		Import Status									
	O-OP-C										
			Source Id	Source	Created By	Created Date 🛛 🗍	Status	Number of Reco	Failed Count	Processed Count	
	Pill Works 1.3	>	mti-stage-ctms	edc-ftp	system system	29 Sep 2022, 1	FAILED	12	12	0	
	Settings	>	mti-stage-ctms	edc-ftp	system system	29 Sep 2022, 0	FAILED	12	12	0	
0	General	>	mti-stage-ctms	edc-ftp	system system	27 Sep 2022, 0	FINISHED	6	3	3	
-	Fields										
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≣	Lookups										
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	Team Role Management										
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	Site Visit Types										



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KWD Trial

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9. The status of the import may be tracked	Product Khyati Wonder Drug
from the 'Import Status' area in the	🔅 General
navigation links at the left side of the screen.	Regions
	Milestone Templates
	Access Permissions
	1 Import
	🗮 Fields
	Site Visit Types
	💄 Subjects
	Import Status

Import Status											
										2 Refresh	
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	



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