

How to Import Subject Data

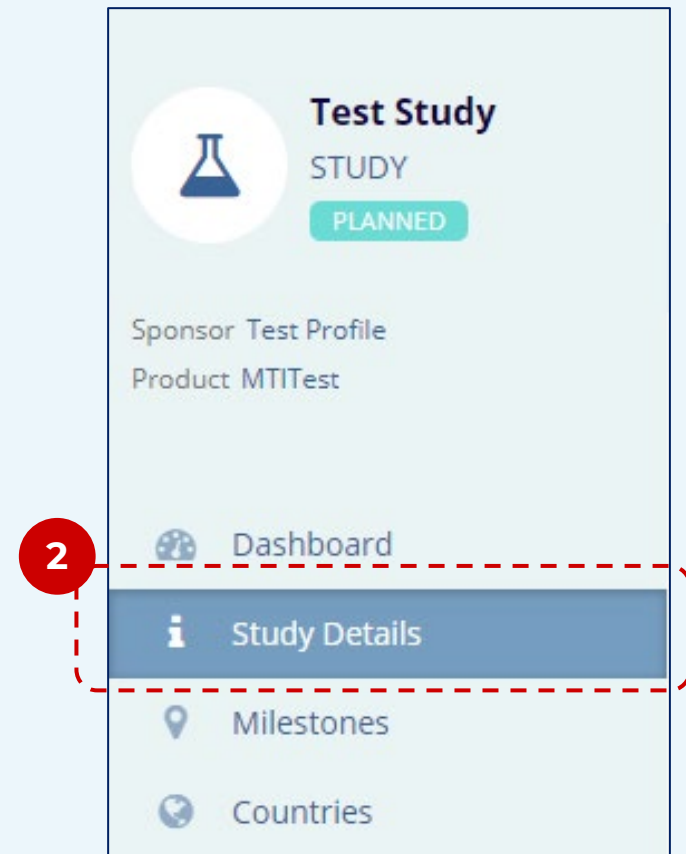
CTMS version 2.1

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.

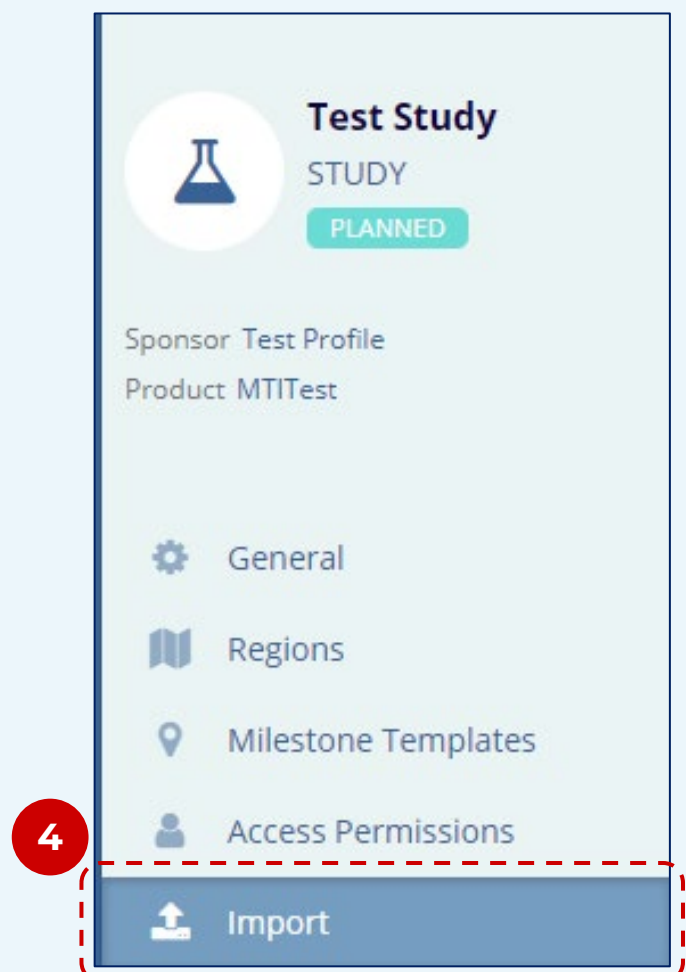
2 Navigate to the **Study Details** area using the navigation links at the left.



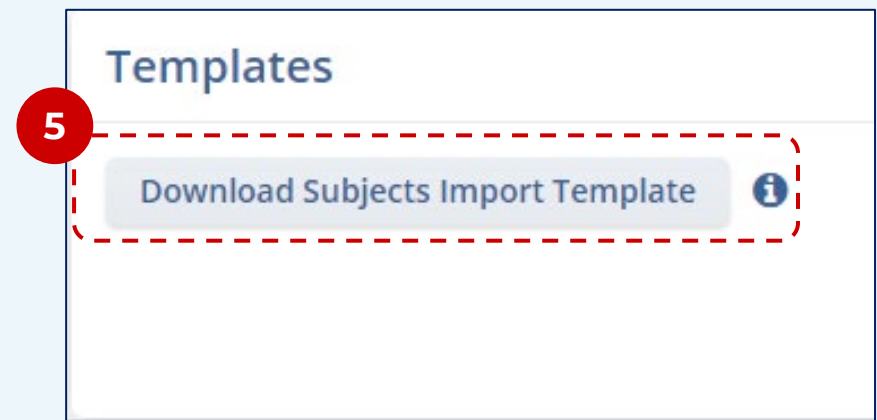
3 Press the **Settings** button at the top-right corner of the screen.



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.

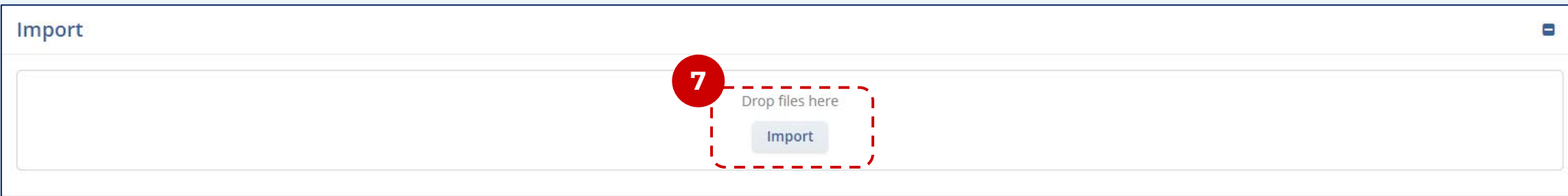


- 6 Enter the data to be imported onto the template downloaded in step 5.

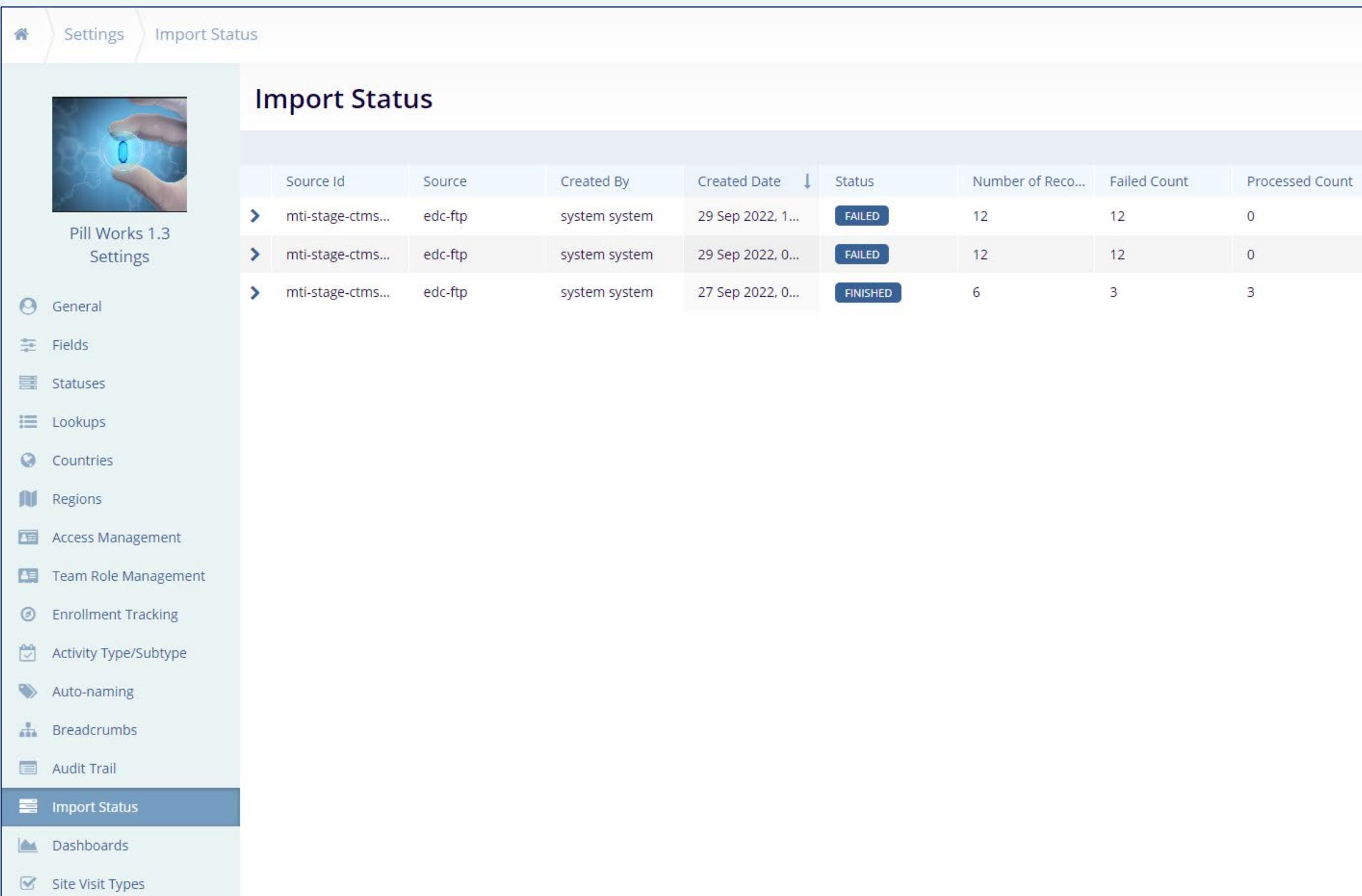
Here are some general tips/info about filling out the template:

- 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.



Settings > Import Status

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

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

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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Product Khyati Wonder Drug

- General
- Regions
- Milestone Templates
- Access Permissions
- Import
- Fields
- Site Visit Types
- Subjects
- Import Status**

Import Status

[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