Import Data

> ⚠️ **Real Data vs Dummy Data**
>
> If your project is in **Development** status any *real* data should **NOT** be entered until the project has been moved to **Production** status.
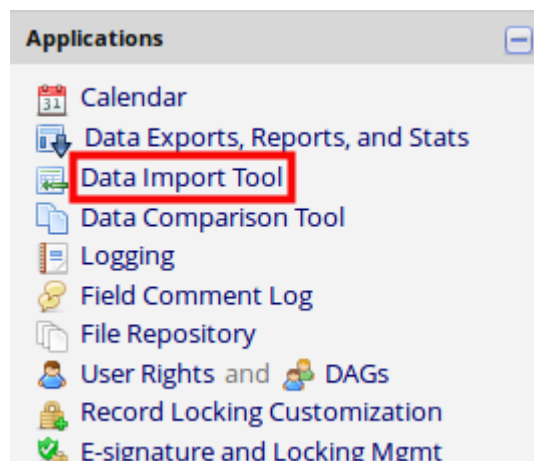
> 🔥 **Importing Data**
>
> If you have data to Import in to the production server make sure the project has been tested and moved to **production status** first.

> ⚠️ **User Rights Setting**
>
> The **Data Import** link is a **User Rights** setting.

- Click the **Data Import link** on the left hand side.

- Download a copy of the **Data Import Template** and save it as a .csv file.

CSV import   **CDISC ODM (XML) import**

Instructions:

1.) Click the link below to download your data import template as a CSV (comma delimited) file. Save it locally to your computer and then open it to begin filling it with the data you wish to import.

Download your Data Import Template (with records in rows)
OR
Download your Data Import Template (with records in columns)

2.) In each column of the Data Import Template file that you downloaded, place the data for each record that you wish to import. Once all your data has been added, save the file.

- Be sure not to change the Variables/Field Names in the file or an error may occur.
- Also, for all of the 'dropdown' or 'radio' fields in the project, you must make sure that the numerical value

▪ Open the template in Excel or LibreOffice and enter the data you want to import. When you are finished, save the file as a .csv

🔥 **Good Practice**

- Do not change the Variables/Field Names in the file;

- Enter only numerical values in the *dropdown* and *radio* cells;

- Delete any empty rows and columns before importing the file;

- Be aware of any **Branching Logic** within your form. The data that is imported may be correct but may cause conflicts with form logic;

- Import only 1 form at a time to ensure you are not overwriting existing data;

- If you are entering *dummy* data you can use the "drag" function in Excel to create random dates or data ranges to test validation configurations;

- Double check your **date** and **datetime** formats are correct: YYYY-MM-DD or DD/MM/YYYY etc;

- Check the *complete* fields have either **0, 1, 2**. This will set the **status** of the form.

	A	B	C	D
1	record_id	yes_no	text_field	my_first_instrument_complete
2	1	0	This is a test import	0
3	2	1	Another import	1
4	3	1	Repeat Import	2
5	4	0	import import	
6				

▪ Go back to the **Data Import** screen. Click **Browse** to select the import file on your computer and continue to **Upload** File.

Record format: The file to be uploaded has its records stored as separate [Rows ▾]

Format for date and datetime values: [DD/MM/YYYY or YYYY-MM-DD ▾]

Allow blank values to overwrite existing saved values? [No, ignore blank values in the file (default) ▾]

Name the imported records automatically (force record auto-numbering) [?] [No, use the record name provided ▾]

▣ Upload your CSV file:

[Browse...] No file selected.

[Upload File]

🔥 Double check

Check that these options are set correctly. Failure to do so will overwrite your existing data or generate unwanted data.

- **Format for date and datetime values**
- **Allow blank values to overwrite existing saved values?**
- **Name the imported records automatically**

Format for date and datetime values: [DD/MM/YYYY or YYYY-MM-DD ▾]

Allow blank values to overwrite existing saved values? [No, ignore blank values in the file (default) ▾]

Name the imported records automatically (force record auto-numbering) [?] [No, use the record name provided ▾]

Data Quality Check

The **Data Import** will display the number of records that were created or modified during the import to allow you to confirm that all records were imported.

Any data that does not conform to your configuration will be flagged. A list of how to resolve the issues with the import will be provided. No data will be imported *until* the conflicts have been resolved.

KEY for Data Display Table below
Black text = New Data
Gray text = Existing data (will not change)
(Red text) = Data that will be overwritten
Red box = error
Orange box = warning

ⓘ **Errors were detected in the file that was uploaded.**

There are 6 errors (shown in red in the error table below) in this dataset. Please correct any errors and upload the file again.

ERROR DISPLAY TABLE

Record	Field Name	Value	Error Message
1	yes_no	4	The value is not a valid category for yes_no
1	text_field	This is a test import	The value is not a valid category for text_field
2	text_field	Another import	The value is not a valid category for text_field
3	yes_no	3	The value is not a valid category for yes_no
3	text_field	Repeat Import	The value is not a valid category for text_field
4	text_field	import import	The value is not a valid category for text_field

- Once your data has been **Quality Checked**, and any conflicts resolved, the **Import Data** button will appear.

DATA DISPLAY TABLE

record_id	yes_no	text_field	my_first_instrument_complete
1 (new record)	0	This is a test import	0
2 (new record)	1	Another import	1
3 (new record)	0	Repeat Import	2
4 (new record)	1	import import	

Do you wish to import the new data (displayed above) into the project?
(Click the button below to import the data.)

[Import Data]   Cancel

⚠ **Please Note**

Uploading in batches may be preferred if it takes along time to upload all data.

▪ The **Import Successful** message will appear once the import has been completed.

⊘ **Import Successful!** **4** records were created or modified during the import.

The data you uploaded from the file was successfully imported into the project. If you wish to import more data, you may use the box above to select another file on your computer.