

3.4.7 Upload a Defined CRF

After using Excel to provide content for a defined CRF, upload the CRF to OpenClinica:

1. From the Tasks menu, in the Study Setup module, select Build Study.
The Build Study page opens.
2. For the Create CRF task, click the View icon.
The Manage Case Report Forms page opens.
3. Click Create a New CRF.
The Create a New Case Report Form page opens.

here.' and 'OpenClinica is tested and supported with the use of Microsoft Excel 97-2003. If you are using a more recent version of Excel, please use the options to "save as 97-2003 version".' There is a text input field labeled 'MS Excel File To Upload:' with a 'Browse...' button next to it. At the bottom, there are two buttons: 'Preview CRF Version' and 'Exit'." data-bbox="117 305 921 469"/>

4. Click Browse, then navigate to the defined CRF you want to upload. Select the file and click Open.
5. In the Create a New Case Report Form page, click Preview CRF Version.
The Check CRF Version Data page opens.
6. If there are any errors, OpenClinica reports them at the top of the page and provides details for the cells containing the errors below that. Click Go Back, [correct the errors in the defined CRF using Excel](#), and repeat steps 4 through 6.

Example of an Error Message for a Defined CRF:

Check CRF Version Data

There were several invalid fields in your spreadsheet. Please take a look at the data below,

click [Go Back](#) to go back and upload your corrected spreadsheet for the CRF.

There are an incomplete number of option-value pairs in RESPONSE_OPTIONS column and Response values column at row 11, Items worksheet.

Example Showing Details for the Errors that are in the Defined CRF:

9.0	single-select	N_AB_NE	Normal, Abnormal, Not Examined,\\ but NUMBER OF OPTIONS DOES NOT MATCH	1,2,99 NUMBER OF VALUES DOES NOT MATCH
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7. When the defined CRF you uploaded is free of errors, OpenClinica displays a preview of the web interface for the CRF, and the Alerts & Messages sidebar panel displays a success

message. Review each section of the CRF in the web interface preview (click the tab for a section to show it), viewing drop-down lists, checking wording and arrangement of Items, and so on. Make notes of anything you want to change. To make changes, click Cancel, [make changes using Excel](#) and save the file, then repeat steps 4 through 6. (Note: do not click Continue while you are still changing the content of the defined CRF. If you do click Continue but still want to make changes, you will need to [replace the existing CRF or create a new version of it.](#))

Preview a CRF:

8. After previewing the defined CRF and completing any changes, click Continue.

The Create a New CRF - Data Committed Successfully page opens.

9. Review the defined CRF:

1. Click Go back to the CRF List.
The Manage CRFs page opens.
2. For the CRF you want to review, click the View icon in the Actions column for the version you defined (do not click the View icon in the row that is marked "original" version).
3. Review each section of the defined CRF (click the tab for a section to show it), viewing drop-down lists, checking wording and arrangement of Items, and so on. Make notes of anything you want to change. If you need to make changes to the name or description,

see [Edit a Defined CRF](#). If you want to, you can instead, [Replace the Defined CRF](#).

After completing all changes to a defined CRF, [assign the CRF to an Event Definition](#) for any of your Studies.

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