



## 5.4.10 Create a New Version of a Defined CRF

You can make changes to a defined CRF that is already in your OpenClinica system.

Start by downloading the existing defined CRF from OpenClinica: see [Download an Existing Defined CRF](#) in [Create a CRF](#). Then make changes to defined CRF using Excel: see [Providing Content for a Defined CRF](#). Finally, upload the new version to OpenClinica. When you upload it, you can either:

- [Replace the existing version](#) (under certain conditions), or
- [Add the modified CRF as a new version](#)

This page is not approved for publication.

### 5.4.10.1 Replace a Defined CRF

You can replace an existing version of a defined CRF under the following conditions:

- You must be the CRF's Owner, as listed in the Table of CRFs. The Owner is the user who uploaded the CRF you are replacing.
- The CRF cannot be assigned to any Event Definitions in any Studies.
- The values for CRF\_NAME and VERSION for the CRF already in OpenClinica and the CRF you are replacing it with must match exactly.

If these conditions are not met, OpenClinica prevents you from replacing the CRF, but you can instead [Add it as a New Version of the CRF](#).

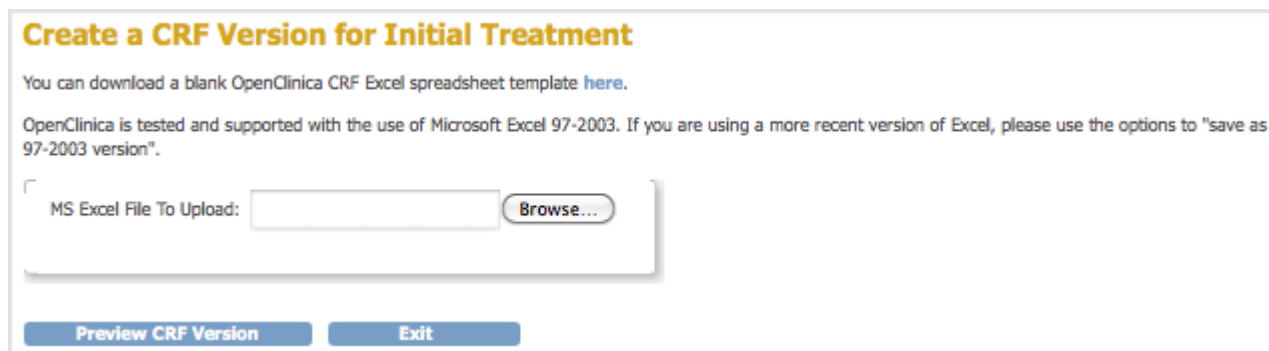
To replace a CRF:

1. Access the [Table of CRFs](#).

CRF Name	Date Updated	Last Updated hv	CRF_OID	Versions	Version_OID	Date Created	Owner	Status	Download	Actions
Adverse Events	05-Jul-2011	agoodwin	F_ADVERSEEVENT	(original)		05-Jul-2011	agoodwin	available		
				v1.0	F_ADVERSEEVENT_V10	05-Jul-2011	agoodwin	available		
				v1.2	F_ADVERSEEVENT_V12	05-Jul-2011	agoodwin	available		
Agent Administration	05-Jul-2011	agoodwin	F_AGENTADMINIS	(original)		05-Jul-2011	agoodwin	available		
				v1.0	F_AGENTADMINIS_V10	05-Jul-2011	agoodwin	available		
Concomitant Medications	05-Jul-2011	agoodwin	F_CONCOMITANTM	(original)		05-Jul-2011	agoodwin	available		
				v1.0	F_CONCOMITANTM_V10	05-Jul-2011	agoodwin	available		
Eligibility	05-Jul-2011	agoodwin	F_ELIGIBILITY	(original)		05-Jul-2011	agoodwin	available		
				v1.0	F_ELIGIBILITY_V10	05-Jul-2011	agoodwin	available		
Initial Treatment	13-Apr-2012	agoodwin	F_INITIALTREAT	(original)		13-Apr-2012	agoodwin	available		
				v1.0	F_INITIALTREAT_V10	13-Apr-2012	agoodwin	available		

2. For the CRF you are replacing, click the Create New Version icon .

The Create a CRF Version for ... page opens. In the example shown here, the CRF being replaced is Initial Treatment.



**Create a CRF Version for Initial Treatment**

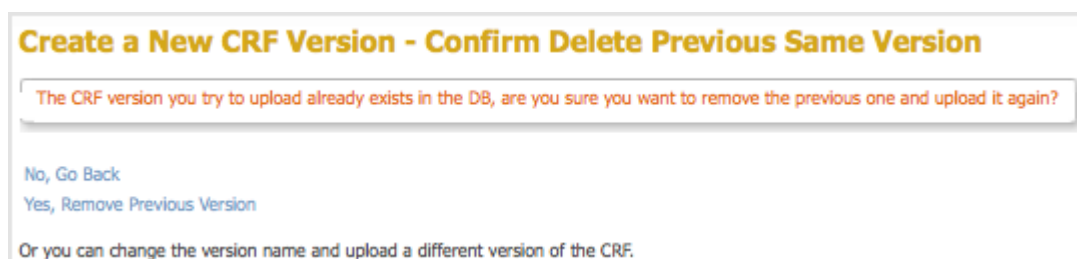
You can download a blank OpenClinica CRF Excel spreadsheet template [here](#).

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".

MS Excel File To Upload:

3. Click Browse, then navigate to the CRF you want to upload. Select the file and click Open.
4. Click Preview CRF Version.

The Create a New CRF Version - Confirm Delete Previous Same Version page opens. In the example, the v1.0 version of the Initial Treatment CRF is being replaced: the CRF you are uploading has the value v1.0 for VERSION, and Initial Treatment for CRF\_NAME.



**Create a New CRF Version - Confirm Delete Previous Same Version**

The CRF version you try to upload already exists in the DB, are you sure you want to remove the previous one and upload it again?

[No, Go Back](#)  
[Yes, Remove Previous Version](#)

Or you can change the version name and upload a different version of the CRF.

5. Click Yes, Remove Previous Version.  
The Check CRF Version Data page opens, presenting a preview of the CRF in the OpenClinica web interface.
6. Correct any errors as described in [Upload a Defined CRF](#) (step 6).
7. After previewing the CRF and completing any changes, click Continue.  
The Create a New CRF Version - Data Committed Successfully page opens.
8. Click Go back to the CRF List.  
The Manage CRFs page opens.
  - There will be a new value for Date Updated if you the version you replaced was last uploaded on a previous date.
  - There is a new Version\_OID for the CRF you replaced. This is not the same as the value you specified for VERSION for the CRF, but is an internal identifier that OpenClinica uses to manage CRF versions.

**Manage Case Report Forms (CRFs)**

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CRF Name	Date Updated	Last Updated hv	CRF_OID	Versions	Version_OID	Date Created	Owner	Status	Download	Actions
Adverse Events	05-Jul-2011	agoodwin	F_ADVERSEEVENT	(original)		05-Jul-2011	agoodwin	available		<a href="#">🔍</a> <a href="#">✎</a> <a href="#">✖</a> <a href="#">📄</a>
				v1.0	F_ADVERSEEVENT_V10	05-Jul-2011	agoodwin	available	⬇	<a href="#">🔍</a> <a href="#">✖</a> <a href="#">✖</a>
				v1.2	F_ADVERSEEVENT_V12	05-Jul-2011	agoodwin	available	⬇	<a href="#">🔍</a> <a href="#">✖</a> <a href="#">✖</a>
Agent Administration	05-Jul-2011	agoodwin	F_AGENTADMINIS	(original)		05-Jul-2011	agoodwin	available		<a href="#">🔍</a> <a href="#">✎</a> <a href="#">✖</a> <a href="#">📄</a>
				v1.0	F_AGENTADMINIS_V10	05-Jul-2011	agoodwin	available	⬇	<a href="#">🔍</a> <a href="#">✖</a> <a href="#">✖</a>
Concomitant Medications	05-Jul-2011	agoodwin	F_CONCOMITANTM	(original)		05-Jul-2011	agoodwin	available		<a href="#">🔍</a> <a href="#">✎</a> <a href="#">✖</a> <a href="#">📄</a>
				v1.0	F_CONCOMITANTM_V10	05-Jul-2011	agoodwin	available	⬇	<a href="#">🔍</a> <a href="#">✖</a> <a href="#">✖</a>
Eligibility	05-Jul-2011	agoodwin	F_ELIGIBILITY	(original)		05-Jul-2011	agoodwin	available		<a href="#">🔍</a> <a href="#">✎</a> <a href="#">✖</a> <a href="#">📄</a>
				v1.0	F_ELIGIBILITY_V10	05-Jul-2011	agoodwin	available	⬇	<a href="#">🔍</a> <a href="#">✖</a> <a href="#">✖</a>
Initial Treatment	13-Apr-2012	agoodwin	F_INITIALTREAT	(original)		13-Apr-2012	agoodwin	available		<a href="#">🔍</a> <a href="#">✎</a> <a href="#">✖</a> <a href="#">📄</a>
				v1.0	F_INITIALTREAT_V10_4122	13-Apr-2012	agoodwin	available	⬇	<a href="#">🔍</a> <a href="#">✖</a> <a href="#">✖</a>

## 5.4.10.2 Add a New Version of a Defined CRF

For background information, see [About CRF Versions](#).

You can add a new version of a CRF to OpenClinica under the following conditions:

- The CRF\_NAME in the new version of the defined CRF must match the CRF Name already in OpenClinica, but the value for VERSION must be different.
- For each ITEM\_NAME, the DESCRIPTION, GROUP LABEL, and DATA\_TYPE must exactly match the DESCRIPTION, GROUP LABEL, and DATA\_TYPE already in OpenClinica. Changes to response sets are limited.

For more information, see [CRF Versioning](#) in the OpenClinica Technical Documentation.

When you add a new version of a CRF, the version already in OpenClinica remains. If you want to, you can [remove the previous version](#) from OpenClinica after adding the new version, or you can keep the previous version if you want users to be able to complete either versions going forward.

To add a new version:

1. Access the [Table of CRFs](#).

**Manage Case Report Forms (CRFs)**

Page 1 of 1  **Find** [Blank CRF Template](#) | [OpenClinica CRF Library](#) | [Create a New CRF](#)

CRF Name	Date Updated	Last Updated by	CRF_OID	Versions	Version_OID	Date Created	Owner	Status	Download	Actions
Adverse Events	05-Jul-2011	agoodwin	F_ADVERSEEVENT	(original)		05-Jul-2011	agoodwin	available		
				v1.0	F_ADVERSEEVENT_V10	05-Jul-2011	agoodwin	available		
				v1.2	F_ADVERSEEVENT_V12	05-Jul-2011	agoodwin	available		
Agent Administration	05-Jul-2011	agoodwin	F_AGENTADMINIS	(original)		05-Jul-2011	agoodwin	available		
				v1.0	F_AGENTADMINIS_V10	05-Jul-2011	agoodwin	available		
Concomitant Medications	05-Jul-2011	agoodwin	F_CONCOMITANTM	(original)		05-Jul-2011	agoodwin	available		
				v1.0	F_CONCOMITANTM_V10	05-Jul-2011	agoodwin	available		
Eligibility	05-Jul-2011	agoodwin	F_ELIGIBILITY	(original)		05-Jul-2011	agoodwin	available		
				v1.0	F_ELIGIBILITY_V10	05-Jul-2011	agoodwin	available		
Last Treatment	15-Apr-2012	agoodwin	F_LASTTREATMEN	(original)		15-Apr-2012	agoodwin	available		
				English	F_LASTTREATMEN_ENGLISH	15-Apr-2012	agoodwin	available		

- For the CRF to which you are adding a new version, click the Create New Version icon . The Create a CRF Version for ... page opens. In the example shown here, a new version (Español) is being added for the Last Treatment CRF.

**Create a CRF Version for Last Treatment**

You can download a blank OpenClinica CRF Excel spreadsheet template [here](#).

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".

















































MS Excel File To Upload:  **Browse...**

**Preview CRF Version** **Exit**

- Click Browse, then navigate to the CRF you want to upload. Select the file and click Open.
- Click Preview CRF Version. The Check CRF Version Data page opens, presenting a preview of the defined CRF in the OpenClinica web interface.
- Correct any errors as described in [Upload a Defined CRF](#) (step 6).
- After previewing the CRF and making changes, click Continue. The Create a New CRF Version - Data Committed Successfully page opens.
- Click Go back to the CRF List. The Manage CRFs page opens. The version of the CRF you added is listed in the table.

## Manage Case Report Forms (CRFs)




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CRF Name	Date Updated	Last Updated by	CRF_OID	Versions	Version_OID	Date Created	Owner	Status	Download	Actions
Adverse Events	05-Jul-2011	agoodwin	F_ADVERSEEVENT	(original)		05-Jul-2011	agoodwin	available		   
				v1.0	F_ADVERSEEVENT_V10	05-Jul-2011	agoodwin	available		  
				v1.2	F_ADVERSEEVENT_V12	05-Jul-2011	agoodwin	available		  
Agent Administration	05-Jul-2011	agoodwin	F_AGENTADMINIS	(original)		05-Jul-2011	agoodwin	available		   
				v1.0	F_AGENTADMINIS_V10	05-Jul-2011	agoodwin	available		  
Concomitant Medications	05-Jul-2011	agoodwin	F_CONCOMITANTM	(original)		05-Jul-2011	agoodwin	available		   
				v1.0	F_CONCOMITANTM_V10	05-Jul-2011	agoodwin	available		  
Eligibility	05-Jul-2011	agoodwin	F_ELIGIBILITY	(original)		05-Jul-2011	agoodwin	available		   
				v1.0	F_ELIGIBILITY_V10	05-Jul-2011	agoodwin	available		  
Last Treatment	15-Apr-2012	agoodwin	F_LASTTREATMEN	(original)		15-Apr-2012	agoodwin	available		   
				English	F_LASTTREATMEN_ENGLISH	15-Apr-2012	agoodwin	available		  
				Espanol	F_LASTTREATMEN_ESPANOL	15-Apr-2012	agoodwin	available		  



















Now, when a user [enters Event Data for a Subject](#), they can choose which version of the defined CRF to use. For the example, Last Treatment, the user can choose the English or Espanol version.

## Enter or Validate Data for CRFs in Follow-up Treatment

[Edit Study Event](#)

Study Subject ID	SMC101
Study Event	Follow-up Treatment
Location	N/A 
Study Subject OID	SS_SMC101
Start Date	27-Jul-2011 
End Date/Time	
Subject Event Status	scheduled
Last Updated by	()

CRFs in this Study Event:

CRF Name	Version	Status	Initial Data Entry	Double Data Entry	Actions
Agent Administration	v1.0				  
Concomitant Medications	v1.0				  
Physical Exam	English 				  
Last Treatment	English  Espanol				  

[View this Subject's Record](#) [Exit](#)