

9.2 Importing Tabular Data

You can import data on the **Import Tabular CRF Data** screen. To do so, you need a Data Text file that contains your data and a Data Mapping file that maps your data to Form items.

When you import a flat file, each data row imports into the Form in a different Event occurrence for the specified Participant.

If you import into a Common Event, new event occurrences are created as needed. If you import into a Visit-Based Event, the data imports into existing scheduled Event occurrences.

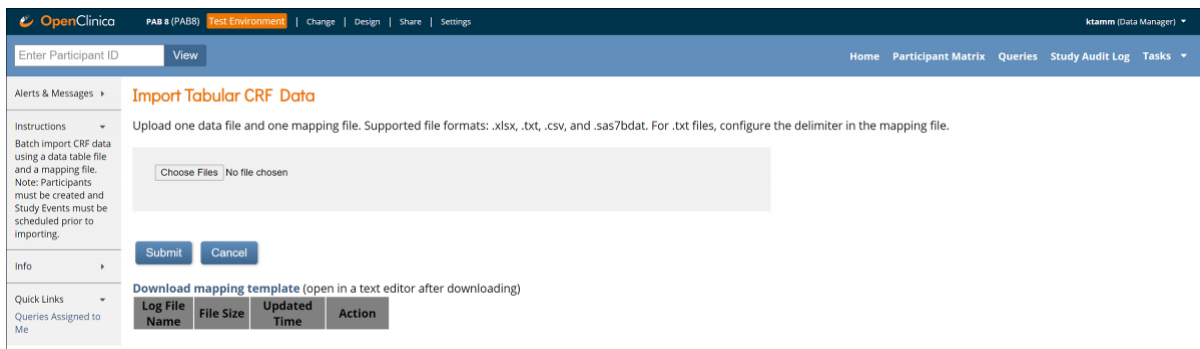
Imports appear on the **Bulk Actions Log**. You can also download the log in a .zip file that contains 5 files.

Note: The flat file import feature does not accept Participant OIDs, it Participant IDs. These are the user-defined IDs that identify Participants in user-facing pages across the system, as opposed to the automatically generated OIDs which identify the Participants on the backend.

To Import Data on the Import Tabular Data screen:

1. Download the mapping template.
2. Edit the template and save it.
3. Create a data text file.
4. Click the **Browse** button.
5. Select your Data Mapping file and Data Text file together by pressing the **Ctrl** key (Windows) or **Command** key (Mac) and clicking on both files.
6. Click the **Open** button.
7. Click **Submit**.

Protip: You can use different delimiters, such as pipe, comma, tab, etc. The Data Mapping Template includes a line you can use to specify which delimiter you are using, for example, **Delimiter=|**. Excel automatically formats data, but if you use another program, you might need to put the data for each delimiter in quotes. For example, if the data is **a | b | c | d,e,f | g | "d,e,f"** would be in quotes.



You can click the **Tasks** button and select **Bulk Actions Log** to check the status of the job. You can view, download, or delete the import from there.

Data Text File

Use this file to specify Participant IDs for the Participants with data you want to import. You can also include other data items with OIDs.

Note: The following formats are supported: text (.txt), CSV (.csv), Excel (.xlsx), and SAS datasets (.sas7bdat). If you use a text (.txt) file, you can use a delimiter of your choice, for example a comma or tab. If no delimiter is specified, the import will use a pipe (|) by default. You can specify the delimiter by adding an additional line, for example: **#Delimiter=t**

To Make a Data Text File:

1. Create a tabular file as a text (.txt) document or use another supported format (see the note above). Alternately, download the sample file to edit.
2. Enter a heading for Participant IDs. If not defined, the heading will be ParticipantID.
3. Enter Participant IDs.
4. (Optional) Create columns for associated data for each Participant, separated by pipe characters or, if you have created a text (.txt) file, another delimiter of your choice. Any spaces before or after item values are removed upon import, so the data entered in the system will not include spaces that are in the beginning or end of the file. Column headers should match those in the Data Mapping file.

Note: Make sure to use the internal item name and response values. For example, in the image below, use **what_stage** for the item name and **stage_i**, **stage_ii**, **stage_iii**, and **stage_iv** for the responses.

Name	Item_OID	GROUP_OID	Description	Group Name	Units	PHI Status	Item Data Type	Left Item Text	Right Item Text	Default Value	Response Layout	Response Label	Response Options	Response Values
what_stage	I_CHEMO_WHAT_STAGE	IG_CHEMO_GROUP1				false	character string	What stage is the cancer currently in?			Vertical	what_stage	Stage I, Stage II, Stage III, Stage IV	stage_i, stage_ii, stage_iii, stage_iv

Data Mapping File

Use this file to map each item to a column header from the Data Text file. For a single item, use the format **itemgroup.item**, replacing item group and item with Item Group and Item OIDs. For multiple items, use comma-separated values in the format of **itemgroup.item, itemgroup.item.**)

You can use **Match Criteria** and **MatchAction** in the Data Mapping file to skip importing specific data or update specific data when the data in a Participant's Form matches the specified criteria.

In order to use **Match Criteria**, you must have created Participants and Visit-Based Events must be scheduled prior to importing.

Match Criteria works for all Event types (Repeating Common Events, Non-Repeating Common Events, Non-Repeating Visit-Based Events, and Repeating Visit-Based Events.) However, for Repeating Visit-Based Events, the data is only imported into the first instance of the Event.

You can specify columns with extraneous data by setting the **IgnoreUnmappedColumns** property to **yes**.

You can use the **FormWorkflowStatus** field to define a final status for your form. You can choose a

status of **Initial Data Entry** or **Data Entry Complete**.

You can specify a **Reason for Change** in your import. The default value is **Update via Import**.

Regardless of Event type:

If there is a match, importing the data for that row is skipped.

If there is no match or Skip/Match criteria are not used, the data for that row is imported.

To Make a Data Mapping File:

You can download a sample Data Mapping file on the Upload CRF Data screen.

1. Create a text file, or download the sample file to edit. Exclude spaces.
2. (Optional) If you want to use Skip/Match Criteria, enter **SkipMatchCriteria=itemgroup.item**, replacing **itemgroup** and **item** with Item Group and Item OIDs. For example, to use **First Name** as criteria, enter **SkipMatchCriteria=IG_PHYSI_GRP2.I_PHYSI_FNAME**.
3. Under the heading, # Study, Study Event and Form OIDs, enter the following in rows:

StudyOID= StudyEventOID= FormOID= FormVersion=

Note: You can only include one Form version in a Data Mapping file. To include another version in the import, you must create a new Data Mapping file and Data Text file. Each pair of files must be imported separately.

4. Next to the first three rows, enter the appropriate OID.
5. Next to FormVersion, enter the version number of the Form.
6. Under the heading, # Data file OIDs, enter a row for the name of each column header in your Data Text file, followed by the OIDs in the format of itemgroup.item, replacing itemgroup and item with Item Group and Item OIDs. For example, to import an item under the column header, **Ethnicity**, enter **Ethnicity=IG_PHYSI_GRP3.I_PHYSI_PETHNIC**.
7. Save the file in the format of filename.properties. (Replace filename with the name of your file.)

Note: To make a **.properties** file, click **File**, and select **Save As**. Then change **Save as Type** to **All Files**, and add **.properties** to the file name. If you previously saved it as a text file, you might need to rename it in order to change the file type.

The Log File

- Is generated with the name **datafilename_log.txt** (The system replace datafilename with the name of your Data Text file.)
- If a data file with the same name is used again, the existing log file from a previous upload is appended to the new log file.
- Contains the following:
 - **Row number:** The row number of the record in the Data Text file
 - **ParticipantID:** The value of the Participant ID in the Data Text File
 - **Status:** The outcome of the import, indicated by the values, Success or Failed
 - Message:
 - For a failed import, displays an error code.

- For a successful import, displays the values imported or skip.

To Download the Log File:

Once the import is complete, click the **Download** button in the **Actions** column.

Common Errors

- Spaces in the Data Text and/or Data Mapping File
- Invalid OID
- Items spelled differently in Data Test and Data Map File
- Mismatched number of columns in the Data Text File and the Data Mapping File
- Items not in the correct format of itemgroup.item
- Items listed by item name, not internal item name (variable).

Common Error Codes and Messages

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Approved for publication by Kerry Tamm. Signed on 2020-11-16 3:37PM

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