### Overview

While Site Coordinators can add participants *manually*, the **Bulk Participant Load** is performed by the **Project Administrator** or **System Administrator**.

Performing a Bulk Participant Load in RDA

1 Log into the **Research Data Authorization** tool:

  a Go to https://rda.dcri.duke.edu

  b Click either the **Login** link or the **Log In** button
You are routed to the **Duke Sign In** page

  c Click your organization's button to connect and log in using your organization credentials
Note: You might need to click the **Show all** button to find and click on your organization.
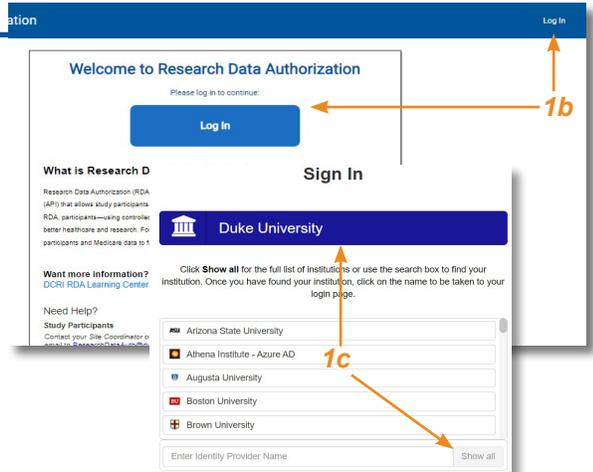
2 On the **Participants** screen, select the correct project from the **Current Project** drop-down
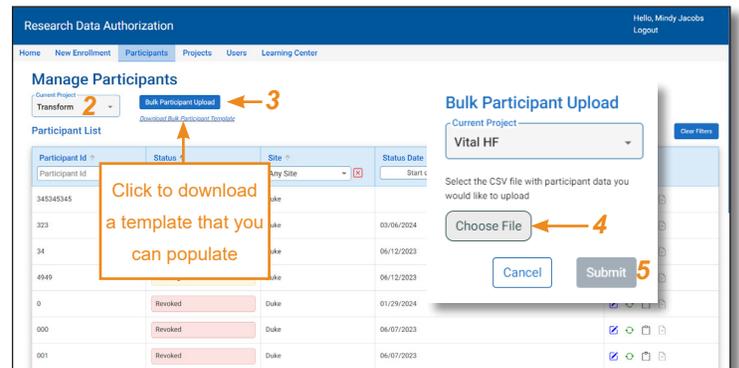
3 Click **Bulk Participant Load**

4 Click **Choose File**, and select the file

- Must be in *CSV* format
- Must contain *Site*, *Participant ID*, *First Name*, *Last Name*, and *Email Address*
- Click the *Download Bulk Participant Template* link to download a template that you can populate, if needed

5 Click **Submit**
The imported records appear in the **Participant List** (you might need to refresh the window)

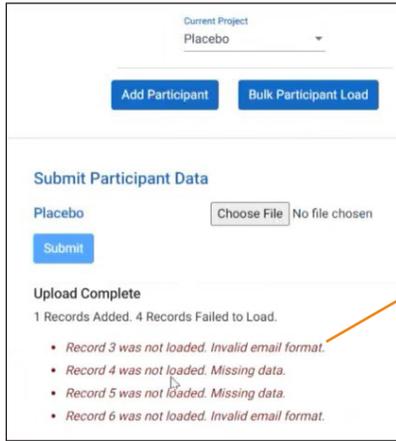## Errors that can occur during a Bulk Participant Load

Refer to the following table when records are not loaded due to errors:

Error Message in DDA	Guidelines
A site matching site name 'XXX' could not be found	The CSV file you are attempting to load contains sites that do not match the *project* in the **Current Project** field. Select the correct project from the drop-down, and then click **Choose File** to select the CSV file again.
Invalid email format	An email address on the CSV file is incorrectly formatted. A valid email address format is $x@y.z$. Correct the format on the CSV file and then click **Choose File** to select the CSV file again.
Missing data	Data on the CSV file is missing for a record.
Potential duplicate record	Occurs when a record you are attempting to load is already in the RDA Participant List. This can occur if a record was previously added manually, or if you attempted to perform a Bulk Participant Load again after correcting errors like the ones listed above.

Other Considerations

- Bulk Participant Load files must be in *CSV* format and must contain the participants' *Site*, *Participant ID*, *First Name*, *Last Name*, and *Email Address*
- If editing is needed due to errors that appear in RDA during the load, consider opening your CSV file in Notepad for quick editing
- When an error refers to a specific record in the CSV file ("Record 3, Record 4, etc."), note that it is referring to the 3rd *line* of the CSV file (including the header line) - see example below

Getting Help

If you have questions or comments about the content of this QRC, please email Technology Training [**dcriittrain@dm.duke.edu**]. If you experience any technical problems working with **Research Data Authorization** that you are unable to resolve, contact the **RDA Support** team via phone, **919-668-0014**, or email, **RDAuth@duke.edu**.

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