

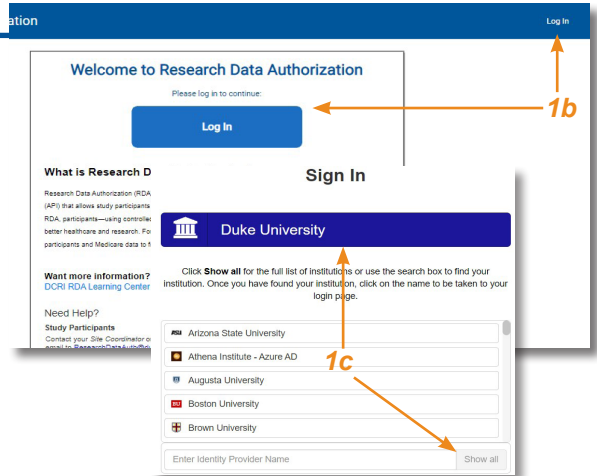
Overview

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

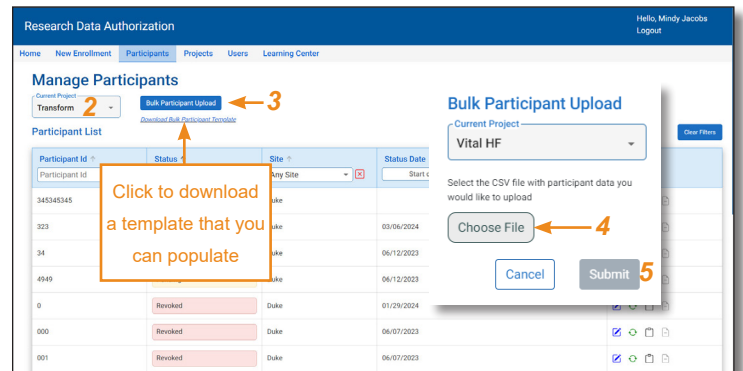
3 Click **Bulk Participant Load**

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)



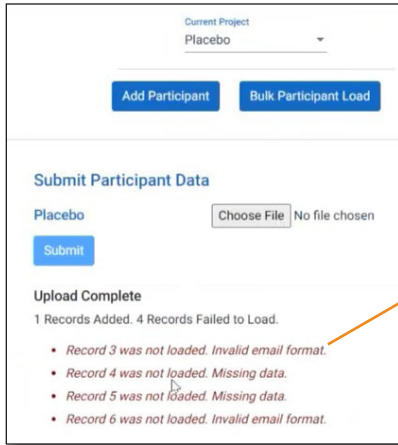
Errors that can occur during a Bulk Participant Load

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 <i>project</i> 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 <i>x@y.z</i> . 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



The screenshot shows the 'Bulk Participant Load' interface. At the top, there is a dropdown menu for 'Current Project' set to 'Placebo'. Below this are two buttons: 'Add Participant' and 'Bulk Participant Load'. A section titled 'Submit Participant Data' contains a 'Placebo' dropdown, a 'Choose File' button (with 'No file chosen' text), and a 'Submit' button. Below this is an 'Upload Complete' section with the message '1 Records Added. 4 Records Failed to Load.' and a list of errors:

- Record 3 was not loaded. Invalid email format.
- Record 4 was not loaded. Missing data.
- Record 5 was not loaded. Missing data.
- Record 6 was not loaded. Invalid email format.

An orange arrow points from the first error message to row 3 of the adjacent CSV table.

	A	B	C	D	E
1	Site	ParticipantId	FirstName	LastName	EmailAddress
2	PL1	abcdeftest00111	testFirst	testLast	testFirst.testLast@test.com
3	PL1	abcdeftest002	testFirstV	testLast	testFirsttestLast@testcom
4	PL2	abcdeftest003	testFirst	testLast	
5	PL2	abcdeftest004	testFirstV	testLast	
6	PL2	123xytest1	testFirst	testLast	testFirst.testLasttest.com
7					

Getting Help

If you have questions or comments about the content of this QRC, please email [Technology Training](mailto:dcrittrain@dm.duke.edu) [dcrittrain@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.