

Migrate study to V4 using CSV - overview

1 Prepare data to be migrated in CSV files

- Pay special attention to dates. Best if they are all uniform (same format, same culture).
- Check code lists so they are consistent.
- If no proper visit structure exist - create it.
- Easiest is to create one file for each form / table.

2 Set up study in Viedoc 3

- Set up forms and visits.
- Use only question-level visibility conditions. It might be good to avoid visibility conditions all together in this step to avoid hiding data that has been input improperly due to poor constraints in previous system. (And instead add visibility conditions in Viedoc 4, only to be applicable for new data.)
- Set up one Helipad for each CSV file to be imported. Again, pay attentions to date formats.
- Do not set up edit checks. But mandatory field checks are preferable to set up.
- Rights groups is not necessary at this step. It is sufficient with one data manager role that can export whole study.
- Allow CDISC ODM to be exported.

3 Add all study sites in Viedoc 3

- Make a CDISC ODM file of the sites and import them in VPC, or create all sites manually.

4 Import data in Viedoc 3 using Helipad

- If there are significant amounts of data, contact Viedoc IT to set up SFTP transfer instead of web upload.

5 Do a quick check inside Viedoc 3 user interface

- Check that visit structure has populated properly and check each form at least once to see that code lists etc looks good.

6 Export data to SAS for a sanity check

- Run some checks to verify structural consistency.

7 Export data to CDISC ODM format

- Make sure to use "Viedoc extensions" and "Unicode UTF-8".

8 Create study in Viedoc 4 admin

- For first run, append the study name with "Pilot run", "Migration test" or something to indicate that it is not the production study.

9 Import CDISC ODM in Viedoc 4 designer

- Use the file that was exported in step 7.

10 Perform touch up on the design in Viedoc 4 designer

- Check that layout of forms are OK. Correct if necessary.
- Important! Do not change any ID:s. And do not delete any work-flow objects, forms or items. Items groups are OK to delete if the items are moved to other item groups.
- Add the necessary roles that should be available in the study.
- Add edit checks that you want to be applied to migrated data.

11 Publish design in Viedoc 4 designer

- This will make the design available to the study in admin.

12 Import data in Viedoc 4 admin

- Again, use the file that was exported in step 7.
- All sites will be created in this step, so there is no need to do this before.

13 Invite yourself to study and test

- Browse around the data.
- Export data and run checks to verify both structural consistency and data contents.

14 Export CDISC ODM from Viedoc 4 designer

- We will use this in a new production study where the final data will be imported.

15 Create production study in Viedoc 4 admin

- This will be the production study

16 Import CDISC ODM in Viedoc 4 designer

- Use CDISC ODM file exported in step 14

17 Publish design in Viedoc 4 designer

- This will make the design available to the study in admin for the production study

18 Import data in Viedoc 4 admin

- Important! Use the file that was exported in step 7, not the one exported in step 14

19 Optional - more constraints on new data (future data - not migrated)

- Designer: Make copy of design
- Designer: Add more visibility conditions
- Designer: Add more edit checks
- Designer: Do any other changes that should apply for new data
- Designer: Publish new design
- Admin: Assign new design to all sites

20 Invite users to the respective sites and roles

- When data is imported into Viedoc 3 using Helipad, all data is tagged with a single system user. This is the only user that will be imported. If data would have been manually entered in Viedoc 3, users would also have been imported. But in this scenario we need to invite all users.

21 Done! Start working!