Migrate from V3 to V4 - quick workout

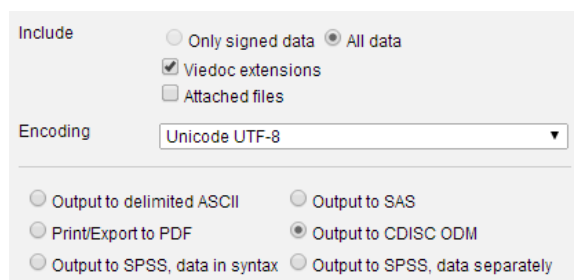**1** **Prepare for design and data export from Viedoc 3**

- Log into Viedoc **Project Controller**
- Select project
- Go to Project Configuration > Settings > Options
- Tick checkbox "**Allow CDISC ODM export** ☑" and Update

2 **Export design and data from Viedoc 3**

- Log into Viedoc
- Launch project with data manager role
- Go to study export
- Select
  - All patients
  - All forms
  - All visits
  - Output to CDISC ODM
  - **Viedoc extensions**
  - **Unicode UTF-8**

  ...and start export!
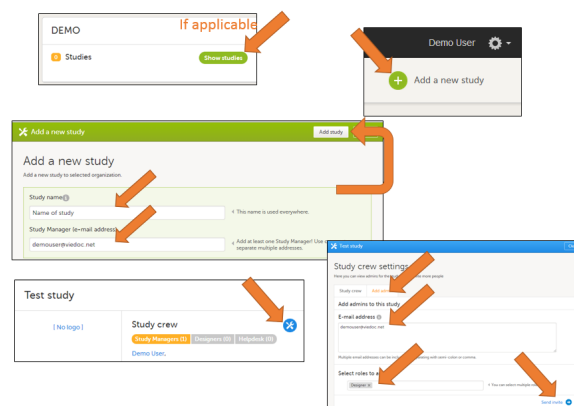- Download and unzip resulting XML file

3 **Create study in Viedoc 4**

- Log into Viedoc 4
- Open **Admin** app
- If you have access to multiple organizations, click **Show studies** on the organization applicable
- Click **Add study** in the upper right corner
- Fill out Study name and Study manager (your email address) fields
- Click Add study
- Click blue toolbox icon in Study Crew box
- Click **Add admin** tab, add email address of designer (your email address), select **Designer** in roles and click Send Invite.
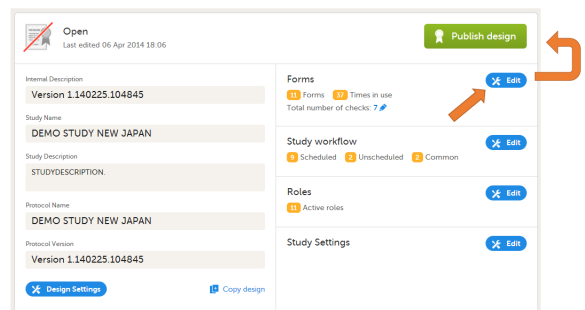
4 **Import design in Viedoc 4**

- Go back to Viedoc 4 start page and open **Designer** app

- If you have access to multiple organizations, click **Show projects** on the organization applicable

- On the newly created project, click **Import a version** (if you already have designs imported in the project, first click Show All in the Design versions box)

- Click **Upload a file** and select the Viedoc 3 export XML. Wait until file is uploaded and text is green.

- Click Upload and continue.

- Scroll down to bottom and click **Import**
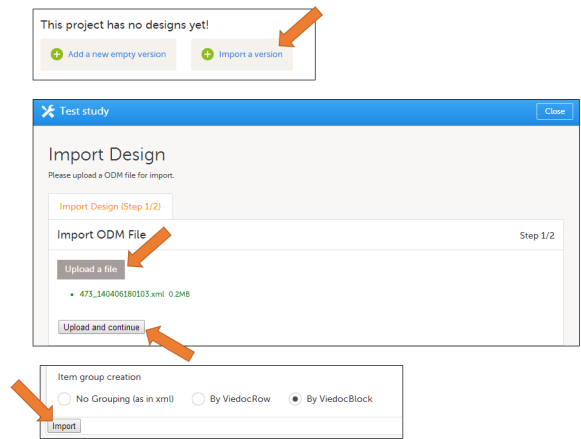
5 **Perform touch up on the design in Viedoc 4 and publish**

- Make the necessary changes to the form layout - but **do not change any ID:s**. Pay extra attention to check box lists and item groups with multiple items - texts might be redundant.

- **Publish** design

6 **Import data in Viedoc 4**

- Go back to Viedoc 4 start page and open **Admin** app

- If you have access to multiple organizations, click **Show studies** on the organization applicable

- On the newly created study, click **Edit Study Settings**

- Click **Import ODM File** tab

- Upload the same Viedoc 3 export XML. Wait until file is uploaded and text is green.

- Click **Upload and continue**

- Enter an email address to be used to when import need to create audit-records (rare cases). E.g. "system@customer.com"

- Click **Continue**, **Continue**, **Continue**

- Enter your password and click **Import**

- Click **Close** and **refresh page**.

- To verify, click **Show sites** and add yourself to any site using the blue toolbox icon, so that you can log on and look at the data.