

## Migrate from V3 to V4 - quick workout

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

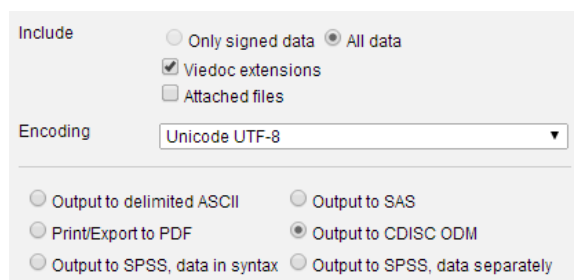
- Log into Viedoc **Project Controller**
- Select project
- Go to Project Configuration > Settings > Options
- Tick checkbox "**Allow CDISC ODM export** ☒ " and Update

### 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



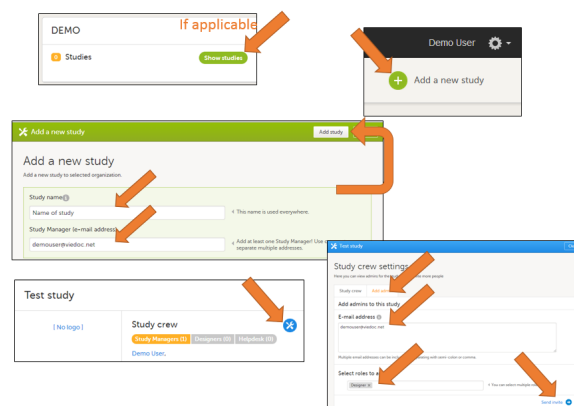
Include ☐ Only signed data ☒ All data  
☒ Viedoc extensions  
☐ Attached files

Encoding

☐ Output to delimited ASCII ☐ Output to SAS  
☐ Print/Export to PDF ☒ Output to CDISC ODM  
☐ Output to SPSS, data in syntax ☐ Output to SPSS, data separately

### 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.



DEMO If applicable  
 Studies [Show studies](#)

Demo User [Add a new study](#)

**Add a new study** [Add study](#)

Add a new study to selected organization

Study name()

Name of study

Study Manager (e-mail address)

\* Add at least one Study Manager (User) to manage the study

**Test study**

[No logo] Study crew [Add new member](#) [Remove member](#)

**Study crew settings**

Study crew [Add new member](#)

Add address to this study

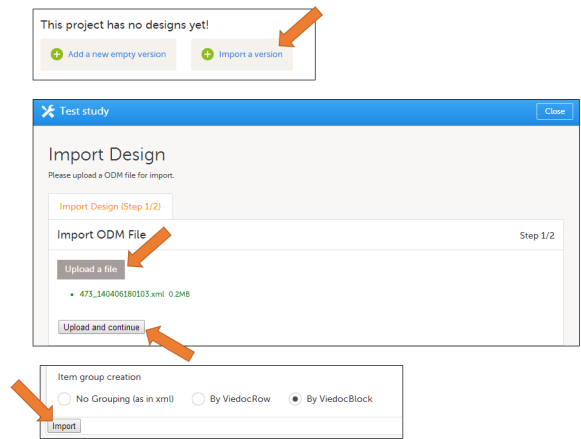
E-mail address

Select roles to assign

[Send Invite](#)

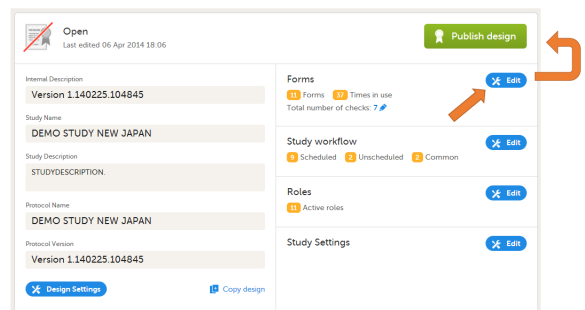
#### 4 Import design in Viedoc 4

- 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 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.

