# Lab 5: Importing Data

Purpose

In this lab, you will import data into your Transportation project..

Part 1: Download the import template

1. Start with the project from labs 1-4.
2. Click **Data Import Tool** (under the Applications section) to open the import page.
3. Under Instructions, in the first paragraph locate the link to "**Download your Data Import Template**". Click this link to download a template customized for the current project. Note the location of where the download will be placed. If necessary, change the location to the Downloads folder or the Desktop to make it easier to find the file.
4. Once downloaded, double click on the downloaded template file to open it in Microsoft Excel. The filename should look like ***project-name*_ImportTemplate_*date*.csv** where project-name will be the name of your project and date will be today's date. For example, Transportation_ImportTemplate_2024-04-29.csv
5. The file should look something like this in Excel:
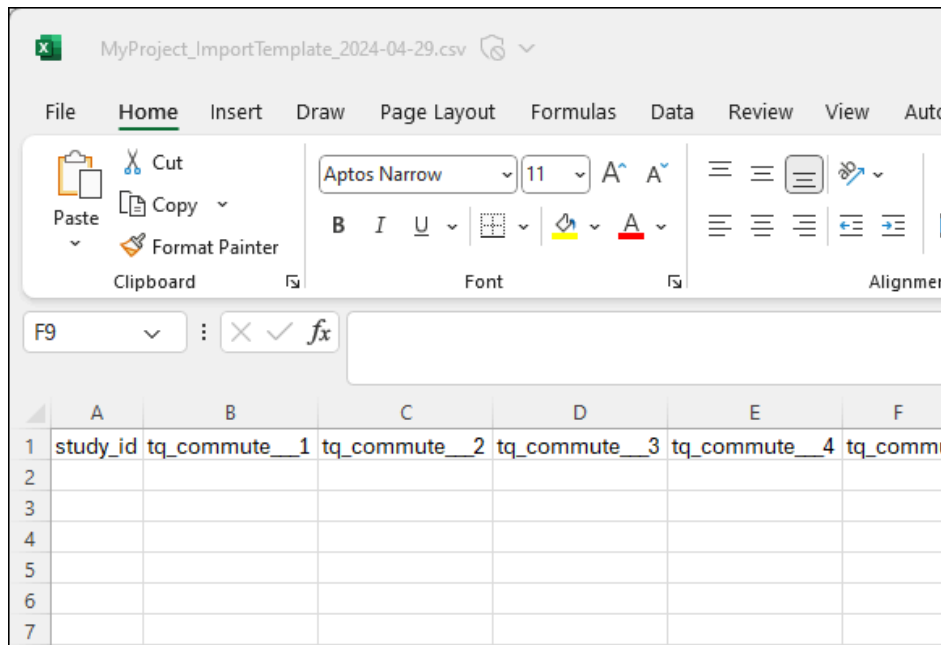
First few fields of the Transportation project's import template.

Part 2: Add data to the template

1. **In Excel**: Since many of the field names are longer than the default Excel cell width, you may need to expand the cell widths to see the field names.

2. **In REDCap**: Back in REDCap, click on the Codebook link (highlighted below) in the left-hand navigation bar to open the project's codebook.

3. At the REDCap Codebook page, click **Expand all instruments** to display a list of the fields in the project and each field's attributes (last column).

4. A project's codebook is a great reference to use when determining what values to use for a particular field in the import file.

   Tip 1: A **checkbox field** like tq_commute will have a column for each option (tq_commute___1, tq_commute___2, etc.). Consult the checkbox to understand which column corresponds to which option. For each checkbox option, you use a value of 1 to indicate a check, and a value of 0 or blank to indicate the checkbox option should not be checked.
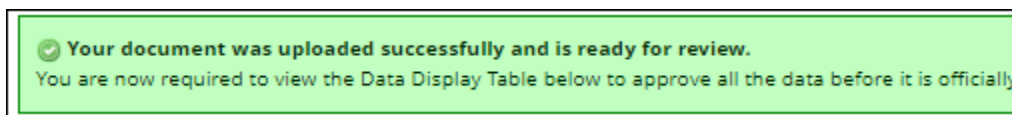
   Tip 2: The last field in every instrument is the automatically-added **"_complete" field**. Its possible values are 0 for Incomplete; 1 for Unverified; and 2 for Complete.

5. Enter 3-5 records with varying values for the fields. Use the codebook to keep the values valid.

6. Note that any records entered with a record_id value matching the value of an existing record you previously entered will update that record. Any record_id value not matching any existing record's record_id will become a new record.
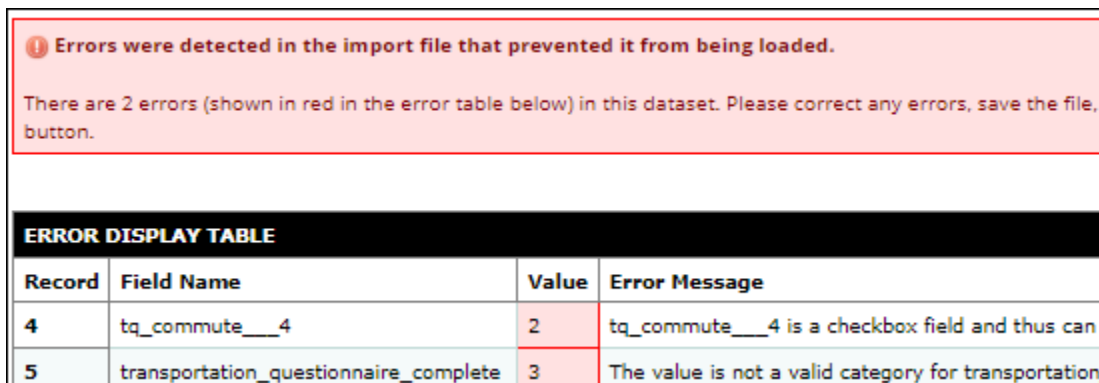
7. Save the CSV file making sure you do NOT let Excel convert it into a different file format. Proceed to Part 3 to import the data into your project.

Part 3: Import the data into REDCap

1. Back in REDCap, return to the Data Import Tool page.
2. In the big green box, choose the following options:
    a. Choose an import option: Import in real time (default value)
    b. Select your CSV data file: click **Choose File** to navigate to and select your CSV.
    c. Remainder of options: leave as default values.
3. Click Upload File to perform an initial validity check of the import file.
4. REDCap responds with either a green (all is good) or red (some issues) box as shown below:

✅ **Your document was uploaded successfully and is ready for review.**
You are now required to view the Data Display Table below to approve all the data before it is officially

Your data is valid! Scroll down to preview the data and complete the import process.

❗ **Errors were detected in the import file that prevented it from being loaded.**

There are 2 errors (shown in red in the error table below) in this dataset. Please correct any errors, save the file, button.

ERROR DISPLAY TABLE

Record	Field Name	Value	Error Message
4	tq_commute___4	2	tq_commute___4 is a checkbox field and thus can
5	transportation_questionnaire_complete	3	The value is not a valid category for transportation

Your data has some problems!

5. Proceed based on whether the validity check passed or failed:
    a. Green box (pass): Scroll down to preview the import data in the DATA DISPLAY TABLE. After reviewing the preview, either click Import Data to import the data or, if you note a problem, click **Cancel**. NOTE: Your data will not be imported unless you click Import Data. If you notice a problem, edit the file and resume with step 2 of Part 3.
    b. Red box (fail): Review the errors in the ERROR DISPLAY TABLE. This table lists the record number, field_name, value, and error message. This should give you enough information to correct your errors. Return to the import file in Excel and fix the issues. Go back to Step 2 of Part 3 and try again. Repeat until the issue is resolved.
6. Click **Record Status Dashboard** to see the newly imported records. Click the green circle button next to any record to view its data.