# HOW TO IMPORT SITE STUDY TEAM CONTACTS IN IREx

Once sites have been added to a study in IREx, site contacts (PIs and Study Team Members) for each site can be imported into IREx in bulk rather than added manually.

IMPORTING SITE STUDY TEAM CONTACTS

1. Ensure the sites for which you would like to import contacts are already added to the study in the **Sites** tab. Click **Download Import Template**.
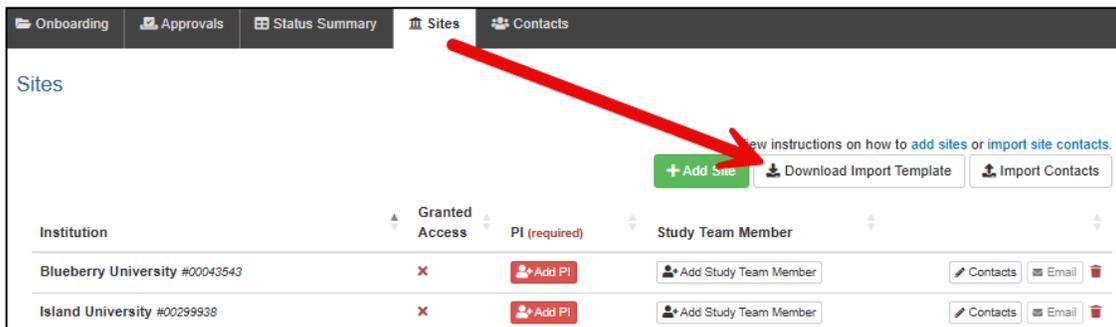
2. Open the downloaded CSV file. The template will have a row for each site added to the study. If a site has already been granted access to the study, it will not appear on the template download.

	A	B	C	D	E	F
1	FWA #	Site Name	Role (PI, Study Team Member)	First Name	Last Name	Email Address
2	43543	Blueberry University				
3	299938	Island University				
4						

3. Insert ONE ROW PER CONTACT with the **roles, first names, last names, and email addresses** of all study personnel you'd like to add for each site. If you need to add multiple study team members for a site, simply copy and paste the site's FWA # and Site Name to add more rows.

	A	B	C	D	E	F
1	FWA #	Site Name	Role (PI, Study Team Member)	First Name	Last Name	Email Address
2	43543	Blueberry University	PI	Marge	Nevea	mnev@blue.cdu
3	43543	Blueberry University	Study Team Member	Horace	Grist	hgri@blue.cdu
4	43543	Blueberry University	Study Team Member	Sasha	Lenck	slen@blue.cdu
5	299938	Island University	PI	Freda	Birch	fbir@isle.cdu
6	299938	Island University	Study Team Member	Uma	Peddrick	uped@isle.cdu
7						

IREx Tip: If you do not want to import contacts for a site, simply delete the site's row from the template. The template can NOT be used to add sites that is not already listed on the study.

4. Once site contacts are added, save the completed template. Return to the **Sites** tab and click **Import Contacts**.
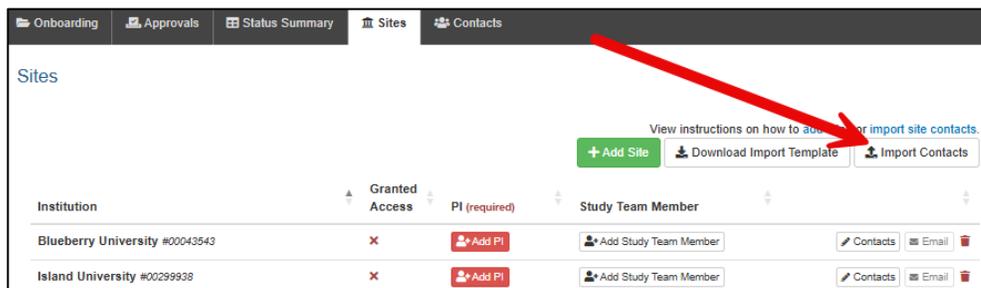
5. Drag and drop or click to upload the CSV file. IREx will check the file to make sure it is formatted correctly. A pop up will appear to let you know that either (1) the file was correctly formatted; or (2) there are errors that need to be resolved. This pop up also serves to allow you to double check all contact information before finally confirming the import.

6. If your upload is formatted correctly, and all the contact information is correct, click **Confirm Import**.

If there is an error, correct the errors and re-upload the template to try again.
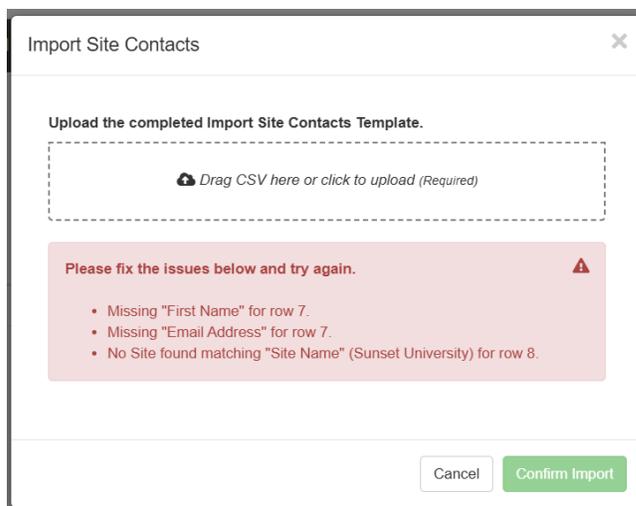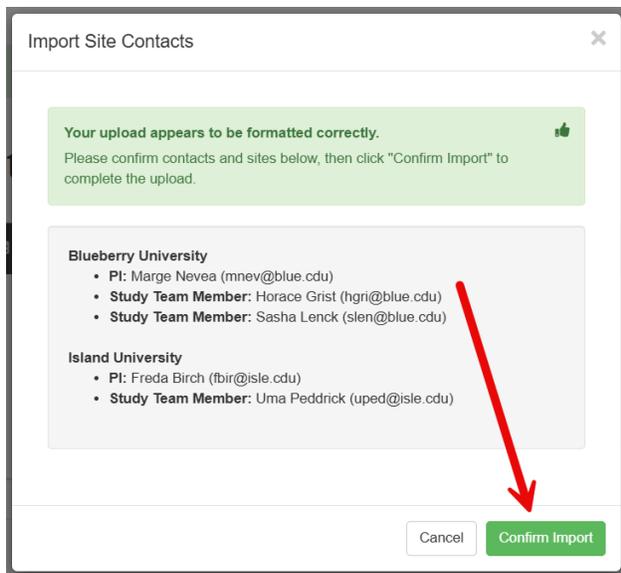
7. Congratulations! You have successfully imported contacts.
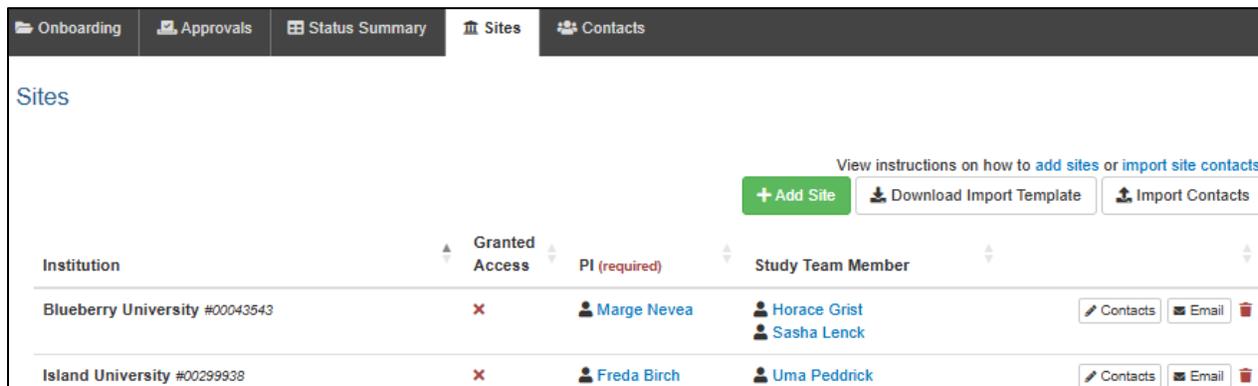
IREx Tips:

- The uploaded template MUST be a .csv file.
- The Role must be either 'PI' or 'Study Team Member'.
- The downloaded template will NOT display contacts already listed for a site, it is only used to import new contacts.
- Any site contacts added via the import function will NOT override/replace existing site contacts.