

MOVING A PROJECT BETWEEN REDCAP INSTANCES

Moving a project from HSSC REDcap (<https://redcap.healthsciencessc.org/>) to USC REDCap (<https://redcap.research.sc.edu/>)

1. Log in to HSSC REDCap, go to the project and click the “other functionality” tab.
2. Click Download metadata & data (XML).

The screenshot shows the REDCap interface for a project named "Test Project" (PID 2983). The navigation tabs include "Project Home", "Project Setup", "Other Functionality" (circled in red), and "Project Revision History". The project status is "Development" and "Completed steps 0 of 7".

Main project settings

Disable Use surveys in this project? [?](#) [VIDEO: How to create and manage a survey](#)

Enable Use longitudinal data collection with defined events? [?](#)

the project is still in development or you can send a request to delete the project while in production to a REDCap administrator.

Copy or Back Up the Project

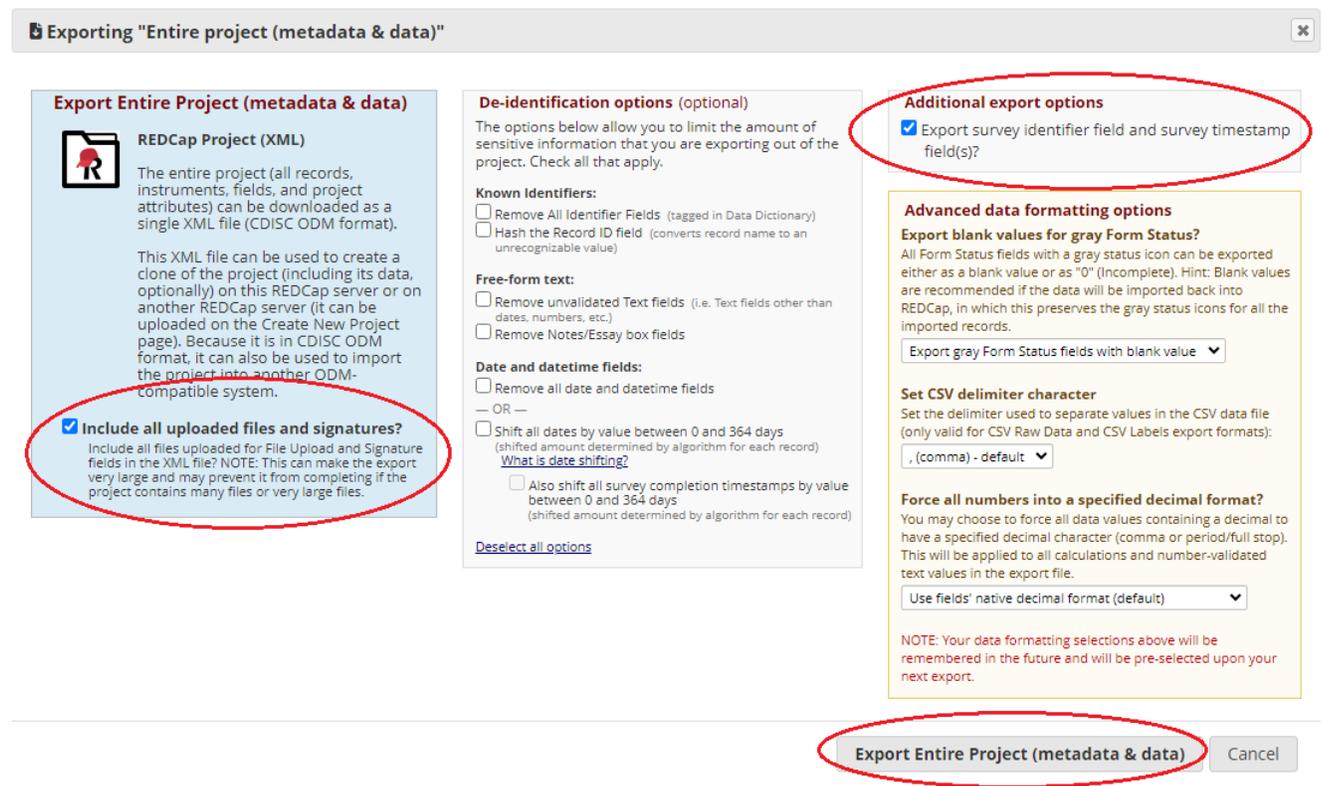
Download a backup of this project. The entire project (all records, instruments, fields, and project attributes) can be downloaded as a single XML file (CDISC ODM format). This XML file can be used to create a clone of the project (including its data, optionally) on this REDCap server or on another REDCap server (it can be uploaded on the Create New Project page). Because it is in CDISC ODM format, it can also be used to import the project into another ODM-compatible system.

Include the following in the XML file:

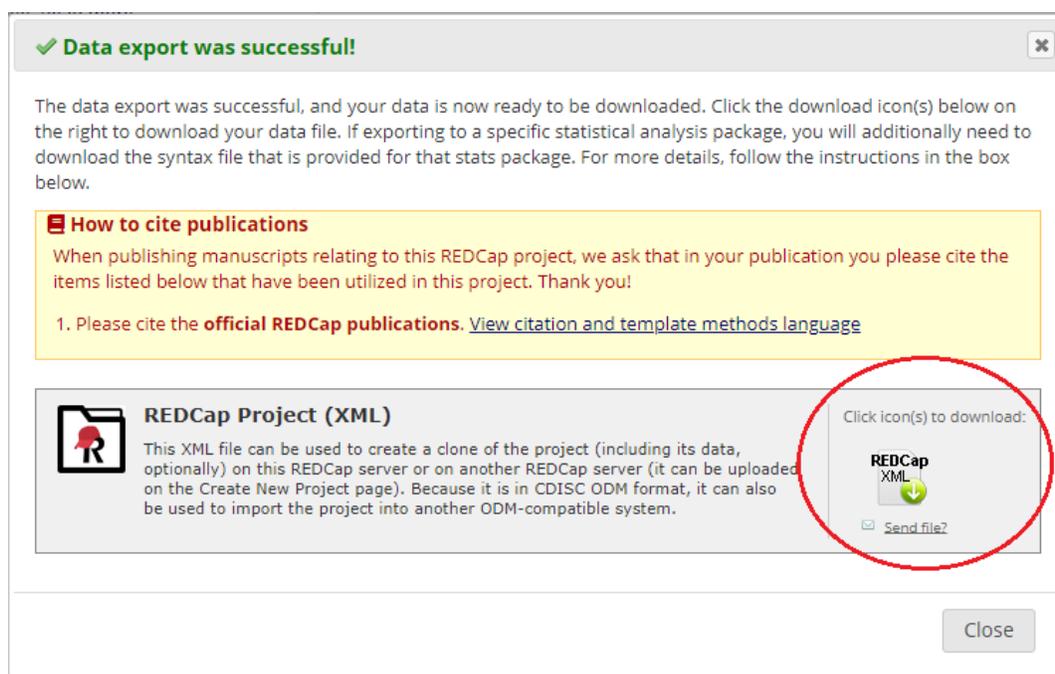
Surveys and survey settings

NOTE: The exported XML file does *not* contain the project's logging history (audit trail), but if you wish to obtain it, you may freely download it any time at the top of the Logging page.

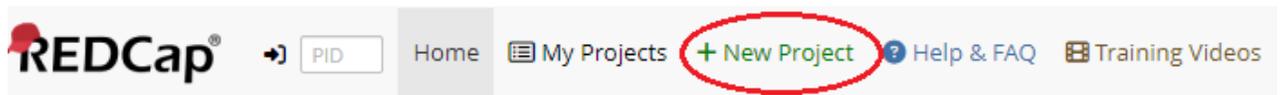
3. Pay attention to all the options available to you. They vary with each project. If you have attachments or uploaded files in your old project, make sure to select “include all uploaded files and signatures” and if needed, export survey identifier field and survey timestamp field(s).



4. When finished selecting options, click the “Export Entire Project (metadata & data)” button.
5. Click on the “REDCap XML” icon and save to your computer.



6. Now you are ready to import into the USC REDCap.
7. Log in to the USC REDCap, click “New Project” and fill in the project title/purpose.



8. Select “Upload a REDCap project XML File (CDISC ODM format)”, navigate to the file you have saved and upload the project.

A screenshot of the 'Create a new REDCap Project' form. The form has a title '+ Create a new REDCap Project' and a sub-header 'You may begin the creation of a new REDCap project on your own by completing the form below and clicking the Create Project button at the bottom.' The form contains several fields: 'Project title:' with the value 'Imported Project'; 'Project's purpose:' with a dropdown menu set to 'Operational Support'; 'Project notes (optional):' with a text area; and 'Project creation option:' with three radio button options. The second option, 'Upload a REDCap project XML file (CDISC ODM format)', is selected and circled in red. Below this option is a 'Select XML file:' label, a 'Choose File' button, and the text 'No file chosen'. The other two options are 'Empty project (blank slate)' and 'Use a template (choose one below)'. The 'Choose File' button is also circled in red.

Note:

- Only instruments that contain fields will move over. If you have no fields designated to an instrument and just a title, this will not transfer.
- Each person on your project will have to log in to USC REDCap before they can be added back to your project.

Alternative steps to migrate a large project into USC REDCap

1. Go to the project in the HSSC REDCap (<https://redcap.healthsciencessc.org/>) and click the “Project Setup” tab, then find the “Data Dictionary.”

Project Home Project Setup Other Functionality Project Revision History Edit project settings in Control C.

Project status: Development Completed steps 0 of 8

Main project settings

Not started

I'm done!

Disable Use longitudinal data collection with repeating forms? ?

Disable Use surveys in this project? ? VIDEO: How to create and manage a survey

Modify project title, purpose, etc.

Design your data collection instruments & enable your surveys

In progress

I'm done!

Add or edit fields on your data collection instruments (survey and forms). This may be done by either using the Online Designer (online method) or by uploading a Data Dictionary (offline method), in which you may use either method or both. You may then enable your instruments to be used as surveys in the Online Designer. Quick links: [Download PDF of all data collection instruments](#) OR [Download the current Data Dictionary](#)

Go to Online Designer or Data Dictionary

You may also browse for pre-built data collection instruments in the REDCap Shared Library

2. Click “Download the current Data Dictionary.”

been updated, changes will NOT immediately be made but will be displayed and checked for errors to ensure that all the Data Dictionary is correct before official changes are made to the project.

Need some help?

If you wish to view an example of how your Data Dictionary may be formatted, you may download the [Data Dictionary demo](#); view the [Data Dictionary Tutorial Video \(10 min\)](#). For help setting up your Data Dictionary, you may also see the instructions in the [Data Dictionary Tutorial](#).

Steps for making project changes:

- 1.) [Download the current Data Dictionary](#)
- 2.) Edit the Data Dictionary (see the [Help & FAQ](#) for help)
- 3.) Upload the Data Dictionary using the form below
- 4.) The changes will be made to the project after the Data Dictionary has been checked for errors

Upload your Data Dictionary file (CSV file format only)

Format for min/max validation values for date and datetime fields: MM/DD/YYYY or YYYY-MM-DD

Browse...

Upload File

3. If your project has any arms or events, please also download your arms and events in the “Define My Events.”

You may also browse for pre-built data collection instruments in the REDCap Shared Library

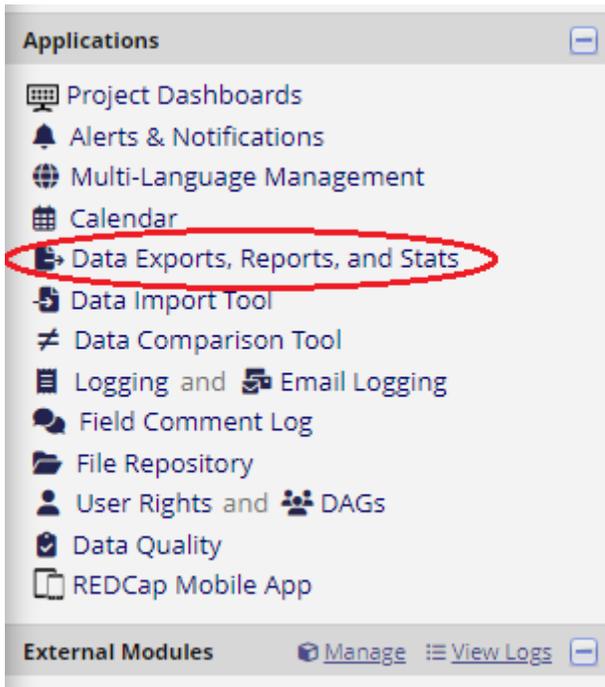
Have you checked the [Check For Identifiers](#) page to ensure all identifier fields have been tagged?

Define your events and designate instruments for them

Create events for re-using data collection instruments and/or set up scheduling.

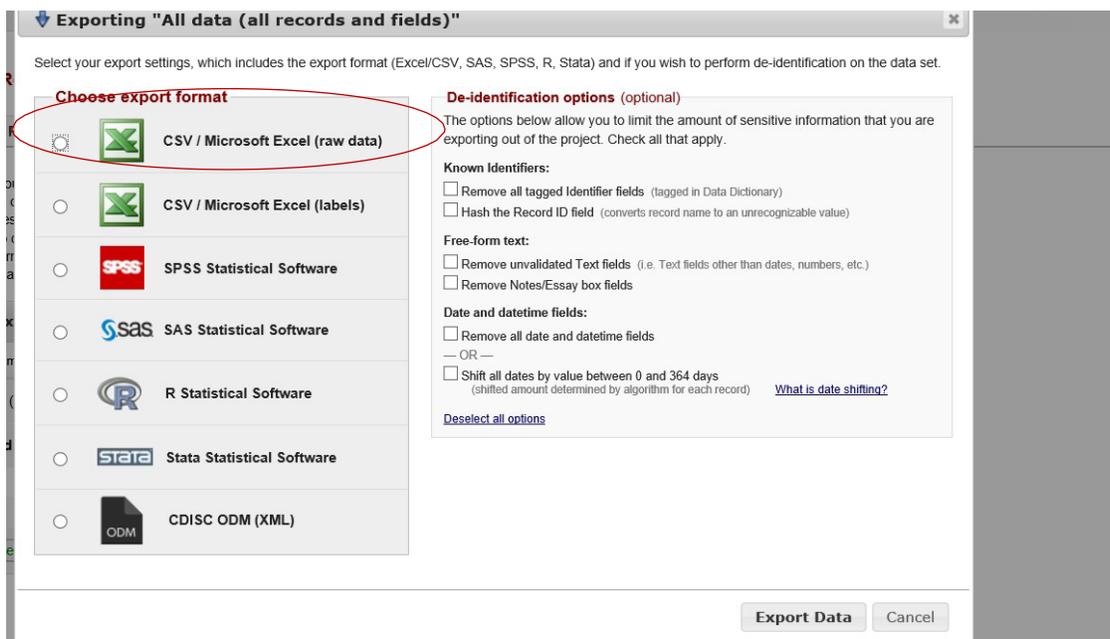
Go to Define My Events or Designate Instruments for My Events

4. Export your data records from “Data Export, Reports, and Stats.”



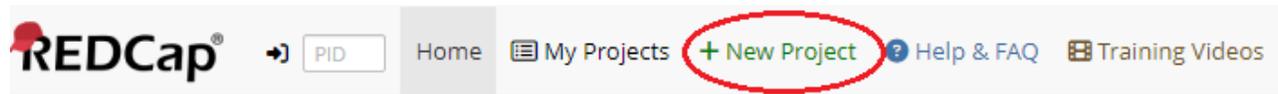
5. Export “All data” from Option A and choose export format as “CSV (raw data).”

My Reports & Exports				
	Report name	View/Export Options	Management Options	Report ID (auto-generated)
A	All data (all records and fields)	<input type="button" value="View Report"/> <input checked="" type="button" value="Export Data"/> <input type="button" value="Stats & Charts"/>		
B	Selected instruments (all records)	<input type="button" value="Make custom selections"/>		



Now you are ready to import all files into the USC REDCap.

6. Log in to USC REDCap (<https://redcap.research.sc.edu/>) and create a new project.



Fill in the project information and select “create an empty project (blank slate)”

The image shows the 'Create a new REDCap Project' form. It includes fields for 'Project title', 'Purpose of this project', and 'Project notes (optional)'. Under the 'Start project from scratch or begin with a template?' section, the 'Create an empty project (blank slate)' radio button is selected and circled in red. Below this is a table of project templates with columns for 'Template title' and 'Template description'. At the bottom are 'Create Project' and 'Cancel' buttons.

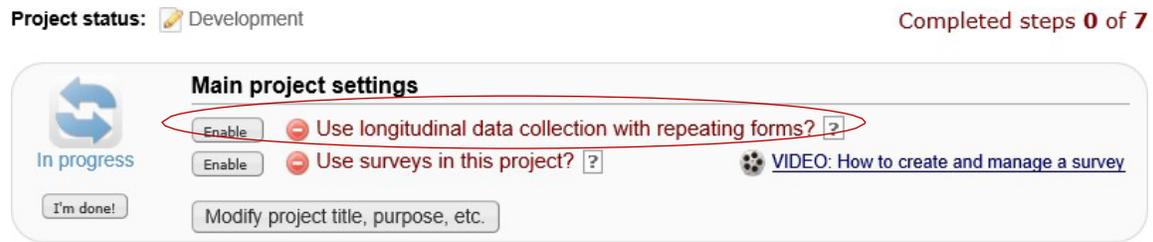
7. In the “Project Setup” tab, click “Data Dictionary” and upload the CSV file you downloaded from step two.

Steps for making project changes:

- 1.) [Download the current Data Dictionary](#)
- 2.) Edit the Data Dictionary (see the [Help & FAQ](#) for help)
- 3.) Upload the Data Dictionary using the form below
- 4.) The changes will be made to the project after the Data Dictionary has been checked for errors

The image shows the 'Upload your Data Dictionary file (CSV file format only)' form. It includes a dropdown menu for 'Format for min/max validation values for date and datetime fields' with the value 'MM/DD/YYYY or YYYY-MM-DD'. Below this is a file input field with a 'Browse...' button and an 'Upload File' button (circled in red).

8. If your project has arms or events, go to the “Project Setup” tab and enable “use longitudinal data collection with defined events.”

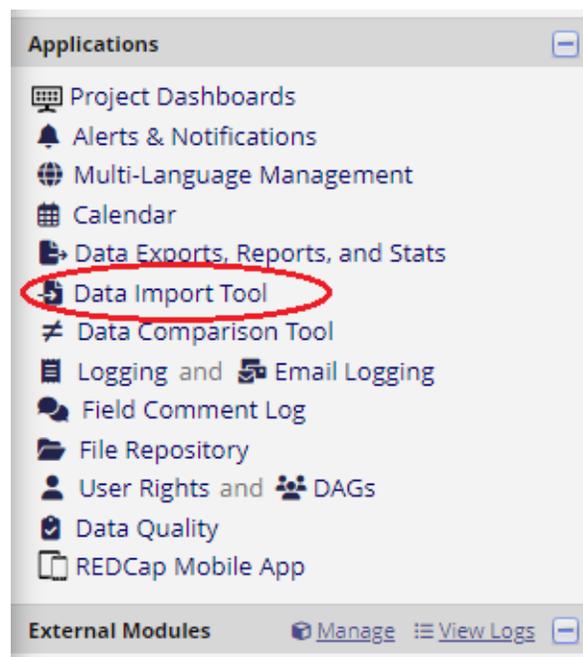


9. Upload your “events/arms” in the “Define My Events”



10. Go to the “Data import tool” and upload “All data” from step 5.

- Any empty rows or columns in the file can be safely deleted before importing the file. Doing this reduces the upload processing time, especially for large projects.
- Once your file has been uploaded, the data will NOT be immediately imported but will be displayed and checked for errors to ensure that all data is in correct format before it is finally imported into the project.



Record format: The file to be uploaded has its records stored as separate

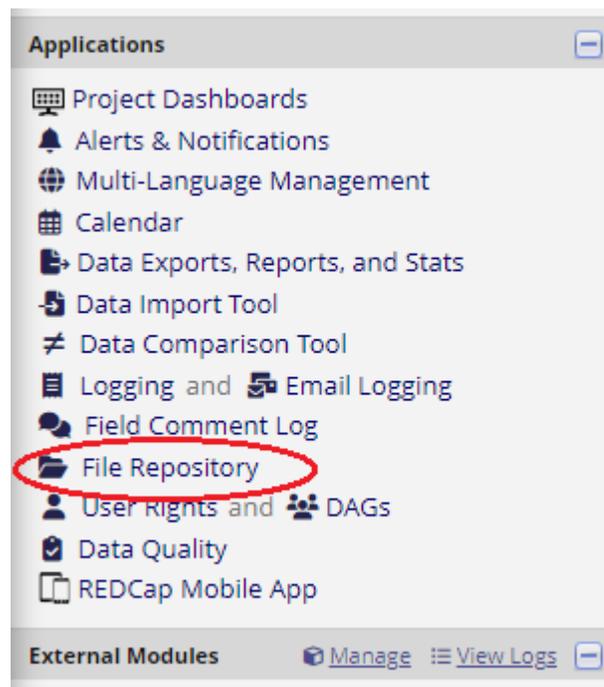
Format for date and datetime values:

Allow blank values to overwrite existing saved values?

Upload your CSV file:

Note:

- If you have project related documents uploaded in the HSSC REDCap, please download and transfer over them to the USC REDCap from “File Repository”.



- Double check everything (data, surveys, arms, events, invitees, etc.) to ensure all you need has been transferred.
- Make sure to check your project setup to ensure all the same features have been enabled.