

Frequently Asked Question (FAQ) Library

How do I transfer my project from one REDCap system to another?

Each REDCap application hosted on a server is known as an instance. At Yale there are several REDCap instances available to build projects and collect data, likewise institutions around the world host their own instances of REDCap. There may be situations where you will need to transfer a project from one instance to another, e.g. the study Principal Investigator (PI) transfers and would like to move their study to the new institution.

There are multiple methods for transferring a project from one REDCap system to another. The two approaches described here use XML files to download information associated with a project.

If you have a large project comprised of many events and a large dataset, you will need to transfer project metadata and data separately (**Option 1**). If your project is small, you can transfer both the metadata and data using one single XML file (**Option 2**).

When transferring project in REDCap, there are two components that you will need to transfer:

- Project metadata – project design and configuration information
- Project data

Pro Tip: XML file exports do **not** contain the project's logging history (audit trail). If you are transferring a project with data, you should also download the audit trail. This can be found under in the left navigation menu in the *Logging* feature by downloading the '*All logging*' csv file and saving it in a secure location per institutional policy for data protection and storage.

Logging

Export (CSV):

Download audit trail

To download the project XML file from its existing REDCap instance:

- Open the project you would like to transfer and navigate to the **Other Functionality** menu option.

Project Home

Project Setup

Other Functionality

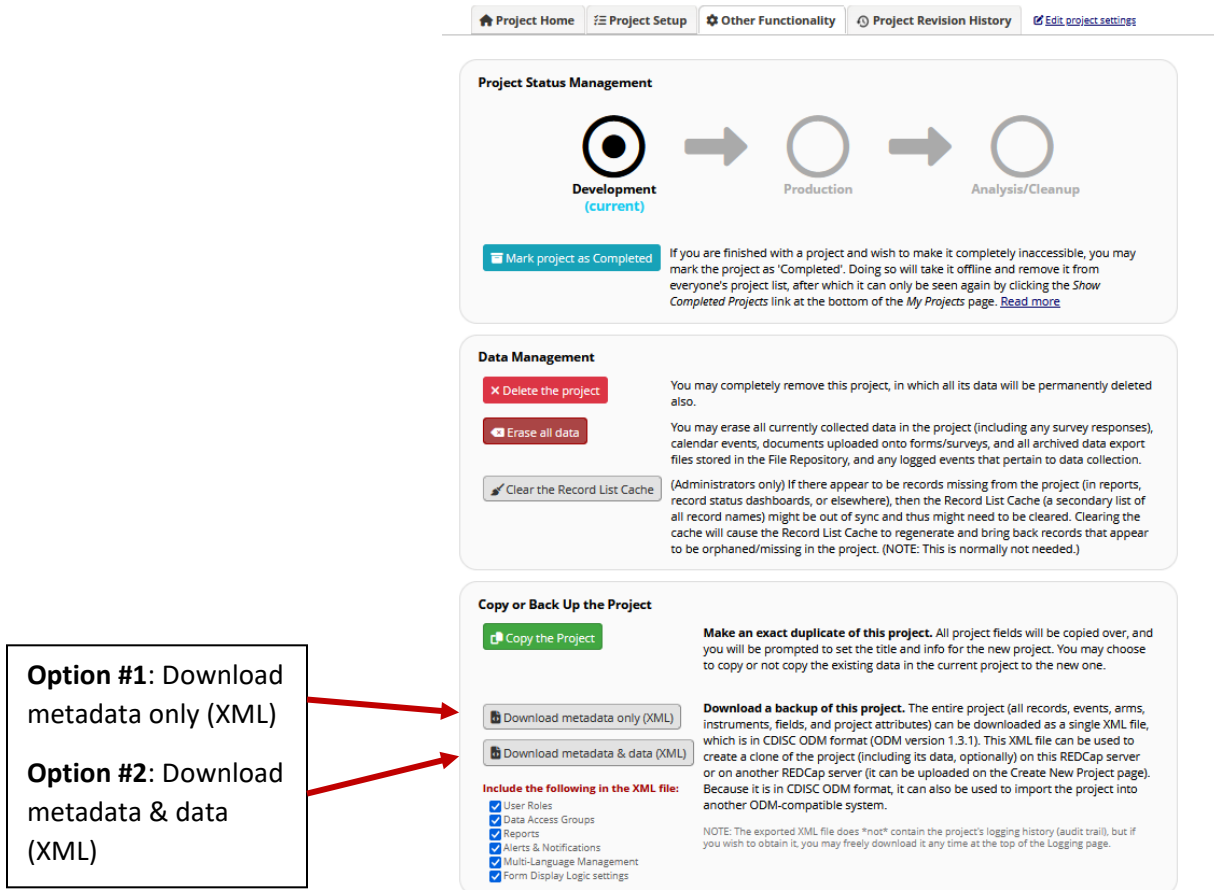
Project Revision History

[Edit project settings](#)

The tables below provide general dashboard information, such as a list of all users with access to this project, general project statistics, and upcoming calendar events (if any).

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2. Choose one of two options for the download:



Option #1: Download metadata only (XML)

Option #2: Download metadata & data (XML)

Project Status Management

Development (current) → Production → Analysis/Cleanup

Mark project as Completed If you are finished with a project and wish to make it completely inaccessible, you may mark the project as 'Completed'. Doing so will take it offline and remove it from everyone's project list, after which it can only be seen again by clicking the [Show Completed Projects](#) link at the bottom of the [My Projects](#) page. [Read more](#)

Data Management

Delete the project You may completely remove this project, in which all its data will be permanently deleted also.

Erase all data You may erase all currently collected data in the project (including any survey responses), calendar events, documents uploaded onto forms/surveys, and all archived data export files stored in the File Repository, and any logged events that pertain to data collection.

Clear the Record List Cache (Administrators only) If there appear to be records missing from the project (in reports, record status dashboards, or elsewhere), then the Record List Cache (a secondary list of all record names) might be out of sync and thus might need to be cleared. Clearing the cache will cause the Record List Cache to regenerate and bring back records that appear to be orphaned/missing in the project. (NOTE: This is normally not needed.)

Copy or Back Up the Project

Copy the Project Make an exact duplicate of this project. All project fields will be copied over, and you will be prompted to set the title and info for the new project. You may choose to copy or not copy the existing data in the current project to the new one.

Download metadata only (XML) Download a backup of this project. The entire project (all records, events, arms, instruments, fields, and project attributes) can be downloaded as a single XML file, which is in CDISC ODM format (ODM version 1.3.1). 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.

Download metadata & data (XML)

Include the following in the XML file:

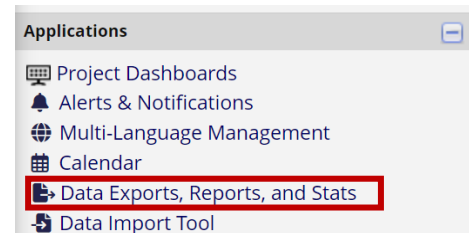
- User Roles
- Data Access Groups
- Reports
- Alerts & Notifications
- Multi-Language Management
- Form Display Logic settings

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.

Option #1: Download metadata to XML file:

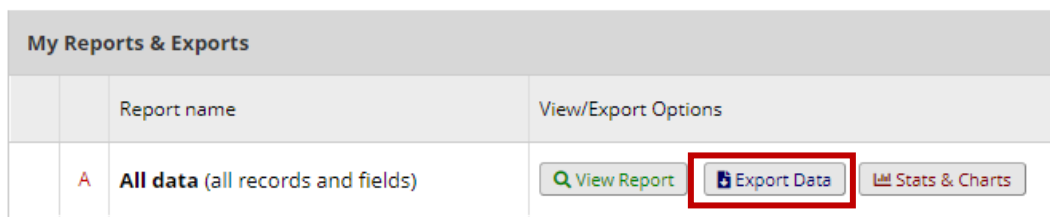
This method will download the project metadata, but not the data. This is best for projects that have many events and/or large amounts of data.

1. Copy the project metadata: On the **Other Functionality** page, select '**Download metadata only (XML)**'. The XML file will be saved in your Downloads folder and should be saved in an accessible location.
2. Export the project data by clicking on '**Data Exports, Reports, and Stats**' on the left navigation menu.



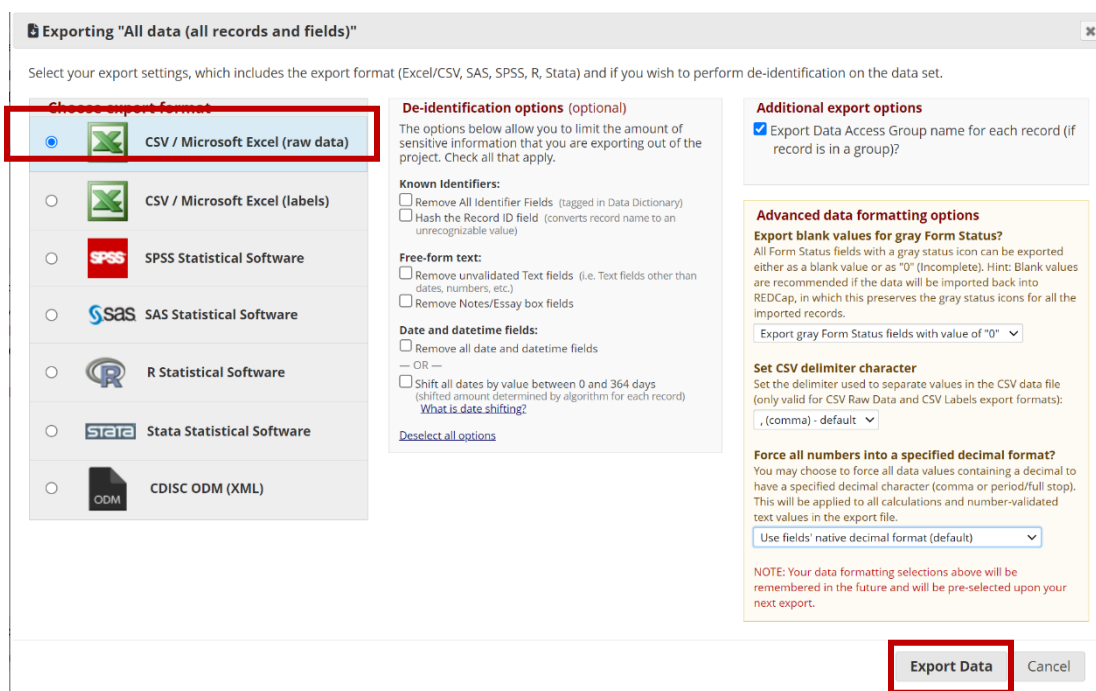
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3. Select **'Export Data'** for the **All data** option:



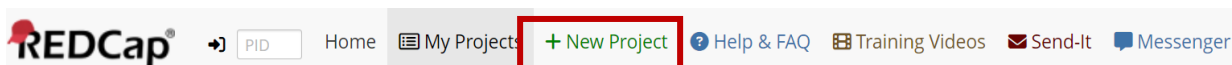
The screenshot shows a table titled "My Reports & Exports". The table has two columns: "Report name" and "View/Export Options". The first row contains the report name "A All data (all records and fields)". In the "View/Export Options" column for this row, there are three buttons: "View Report", "Export Data", and "Stats & Charts". The "Export Data" button is highlighted with a red box.

4. Select **'CSV/Microsoft Excel (raw data)'** and click **'Export'**. This file will be saved to your Downloads folder and should be saved in a secure location per your institutional policy for data protection and storage.



The screenshot shows the "Exporting 'All data (all records and fields)'" dialog box. It prompts the user to "Select your export settings, which includes the export format (Excel/CSV, SAS, SPSS, R, Stata) and if you wish to perform de-identification on the data set." The "Choose export format" section is highlighted with a red box, showing "CSV / Microsoft Excel (raw data)" selected. Other options include "CSV / Microsoft Excel (labels)", "SPSS Statistical Software", "SAS Statistical Software", "R Statistical Software", "Stata Statistical Software", and "CDISC ODM (XML)". The "De-identification options" section includes checkboxes for "Remove All Identifier Fields", "Hash the Record ID field", "Free-form text", and "Date and datetime fields". The "Additional export options" section has a checked box for "Export Data Access Group name for each record". The "Advanced data formatting options" section includes "Export blank values for gray Form Status?" and "Set CSV delimiter character". The "Export Data" button is highlighted with a red box.

5. Login to the REDCap server where you would like to transfer the project.
6. Go to **'My Projects'** and select **'+ New Project'**.



The screenshot shows the REDCap navigation bar. It includes the REDCap logo, a search bar with "PID", and navigation links for "Home", "My Projects", "+ New Project", "Help & FAQ", "Training Videos", "Send-It", and "Messenger". The "+ New Project" button is highlighted with a red box.

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7. Select '**Upload a REDCap project XML file**' and choose the XML metadata file that was downloaded in Step 1.

+ Create a new REDCap Project

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. **Your project will not be created immediately**, but your request will be quickly reviewed by a REDCap administrator, after which you will be notified via email when the project has been created.

Project title:

Project's purpose: How will it be used?

Assign project to a Project Folder?

Project notes (optional): Description of the project's use or purpose (displayed on the My Projects page)

Project creation option:

Empty project (blank slate)

Upload a REDCap project XML file (CDISC ODM format) ?

No file chosen

Use a template (choose one below)

8. Click the Send Request for the new project. Once the project has been created with the metadata incorporated, the data of your project can now be transferred.
9. To transfer the data into your new project, open your project and select '**Data Import Tool**' on the left navigation menu.
10. Select '**Choose File**' and navigate to the saved .CSV data file created in Step 4.
11. Click '**Upload File**'.
12. Follow the on-screen instructions to review the data and click '**Import Data**'.

For more information on the Data Import Tool, please refer to [FAQ: IMPORT DATA](#).

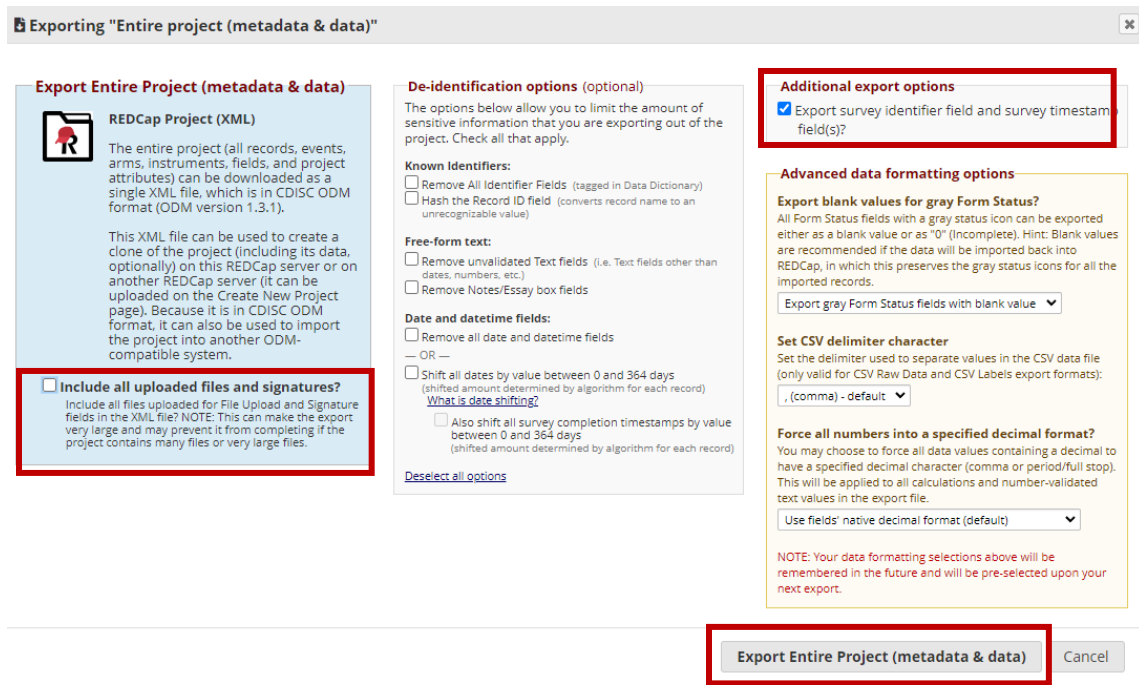
Option #2: Download metadata and data to XML file:

This method will download both metadata and data in one XML file. This is best for small projects with not many events and data.

1. To copy the project metadata and data: On the **Other Functionality** page, select '**Download metadata & data (XML)**'.

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2. A popup box will appear. Select **Export Entire Project (metadata & data)**. The file will be saved in your Downloads folder and should be saved in a secure location per your institutional policy for data protection and storage.
 - a. If your project has files uploaded to file upload field(s) or e-signatures collected in signature field(s), check the box **'Include all uploaded files and signatures'**. Note that this can make the export very large. Numerous and large files may prevent the export from completing.



Exporting "Entire project (metadata & data)"

Export Entire Project (metadata & data)

REDCap Project (XML)

The entire project (all records, events, arms, instruments, fields, and project attributes) can be downloaded as a single XML file, which is in CDISC ODM format (ODM version 1.3.1).

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 all uploaded files and signatures?
Include all files uploaded for File Upload and Signature fields in the XML file? NOTE: This can make the export very large and may prevent it from completing if the project contains many files or very large files.

De-identification options (optional)

The options below allow you to limit the amount of sensitive information that you are exporting out of the project. Check all that apply.

Known Identifiers:

Remove All Identifier Fields (tagged in Data Dictionary)

Hash the Record ID field (converts record name to an unrecognizable value)

Free-form text:

Remove unvalidated Text fields (i.e. Text fields other than dates, numbers, etc.)

Remove Notes/Essay box fields

Date and datetime fields:

Remove all date and datetime fields

— OR —

Shift all dates by value between 0 and 364 days (shifted amount determined by algorithm for each record)

[What is date shifting?](#)

Also shift all survey completion timestamps by value between 0 and 364 days (shifted amount determined by algorithm for each record)

[Deselect all options](#)

Additional export options

Export survey identifier field and survey timestamp field(s)?

Advanced data formatting options

Export blank values for gray Form Status?

All Form Status fields with a gray status icon can be exported either as a blank value or as "0" (Incomplete). Hint: Blank values are recommended if the data will be imported back into REDCap, in which this preserves the gray status icons for all the imported records.

Export gray Form Status fields with blank value

Set CSV delimiter character

Set the delimiter used to separate values in the CSV data file (only valid for CSV Raw Data and CSV Labels export formats):

,(comma) - default

Force all numbers into a specified decimal format?

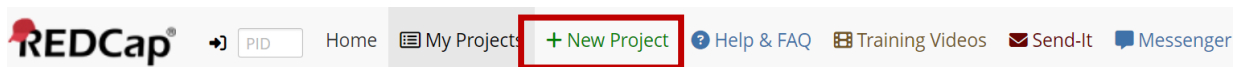
You may choose to force all data values containing a decimal to have a specified decimal character (comma or period/full stop). This will be applied to all calculations and number-validated text values in the export file.

Use fields' native decimal format (default)

NOTE: Your data formatting selections above will be remembered in the future and will be pre-selected upon your next export.

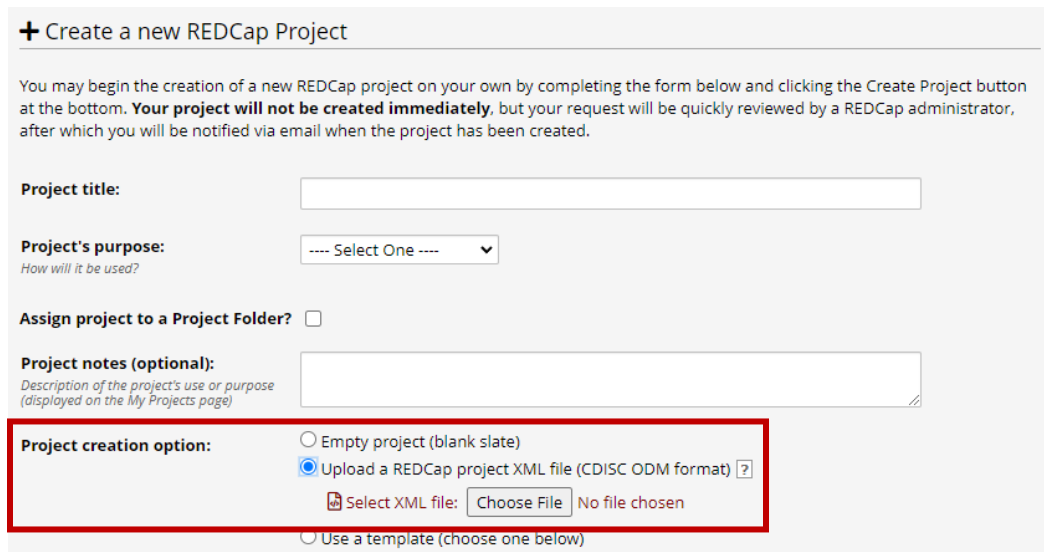
Export Entire Project (metadata & data) Cancel

3. Login to the REDCap server where you would like to transfer the project.
4. Go to **'My Projects'** and select **'+ New Project'**.



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5. Select '**Upload a REDCap project XML file**' and choose the XML metadata and data file that was downloaded in Step 1.



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Project title:

Project's purpose:
How will it be used?

Assign project to a Project Folder?

Project notes (optional):
Description of the project's use or purpose (displayed on the My Projects page)

Project creation option:

- Empty project (blank slate)
- Upload a REDCap project XML file (CDISC ODM format)
- No file chosen
- Use a template (choose one below)

6. Click the Send Request for the new project. Once the project has been created, the metadata and all data of your project will now be transferred.
7. Review the project and data to confirm that everything is transferred correctly.