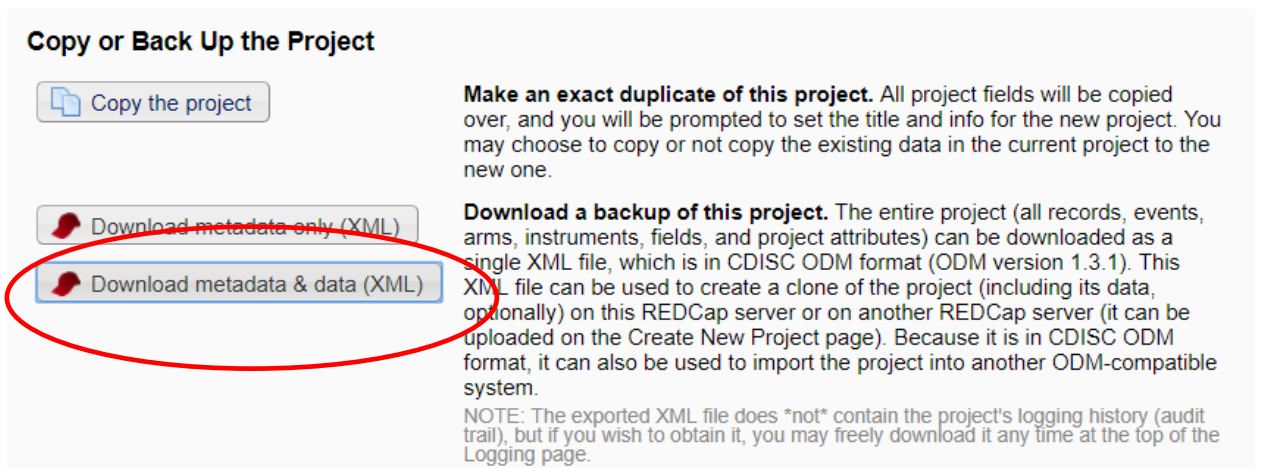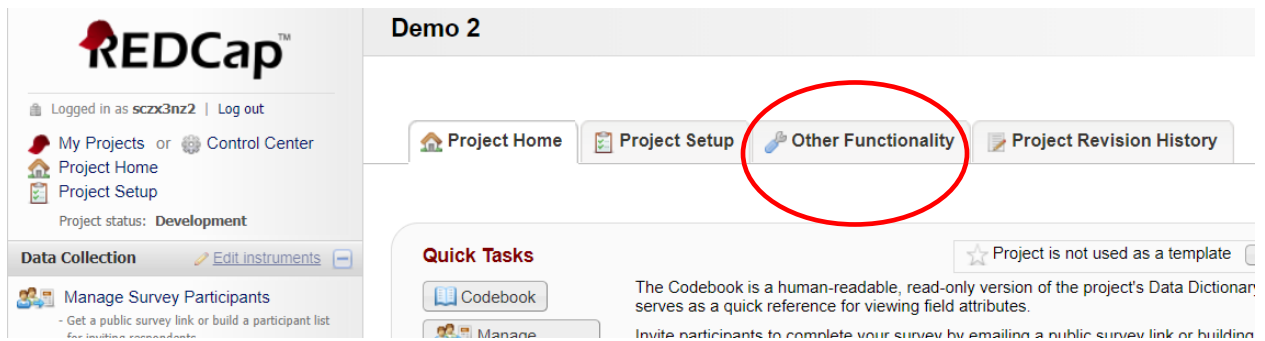**MOVING A PROJECT IN REDCAP**

Moving project from Old REDcap to HIPAA Compliant REDCap

1. Go to the old project and click the "other functionality" tab
2. Click Download metadata & data XML

3. Pay attention to all of the options available to you. They vary with each project. If you have attachments or uploaded files in your old project, make sure to choose include all uploaded files and signature and if needed export survey identifier field and survey timestamp field

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 tagged 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)?

Export Entire Project (metadata & data)   Cancel

4. Click Export the Entire Project
5. Click on the REDCap XML icon and save to your computer

✓ Data export was successful!

The data export was successful, and your data is now ready to be downloaded. Click the download icon(s) below on the right to download your data file. If exporting to a specific statistical analysis package, you will additionally need to download the syntax file that is provided for that stats package. For more details, follow the instructions in the box below.

Citation Notice

Please cite grant support **(UL1TR001855)** in publications relating to this project.

Please also **cite the REDCap project when publishing manuscripts** (citation information and template methods language are available here).

REDCap Project (XML)

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.

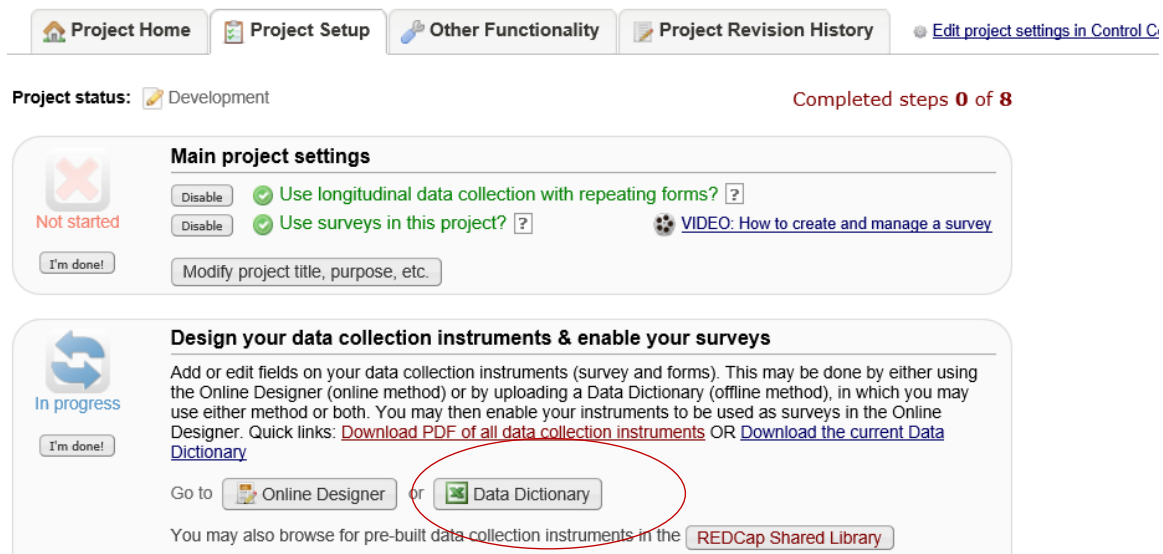Click icon(s) to download:

REDCap XML

✉ Send file?

Close

6. Now you are ready to import into the New REDCap

7. In new REDCap click New Project and fill in the project title, purpose and select upload a REDCap XML File, navigate to the file you have saved and upload the project

8. WARNINGS!!!
   - 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
   - Reports do not transfer and you will have to recreate them manually in the new project

Alternative steps to migrate a large project into HIPPA Compliant REDCap

1. Go to the project in the old REDCap (redcap.sc-ctsi.org) and click the "Project Setup" tab, then find the "Data Dictionary"

2. Click "Download Data Dictionary"

been uploaded, changes will NOT immediately be made but will be displayed and checked for errors to ensure that all the [text cut off]
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 demons [text cut off]
view the Data Dictionary Tutorial Video (10 min). For help setting up your Data Dictionary, you may also see the instructions li [text cut off]

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

STEP #1:
To add new events below, provide an **Event Name** for that event, and then click the *Add new event*. Once events have been added, you can easily
change their order by dragging and dropping the event using the up-down arrow icon on the far left for a given row in the table.

STEP #2:
Once you have defined your events on this page, you may navigate to the Designate Instruments for My Events page, where you may select which
data collection instruments that you wish to utilize for each event you defined.

⚠ **NOTE:** To get you started, we have already added one event for you below. You may edit this event and also add as many events as
you need.
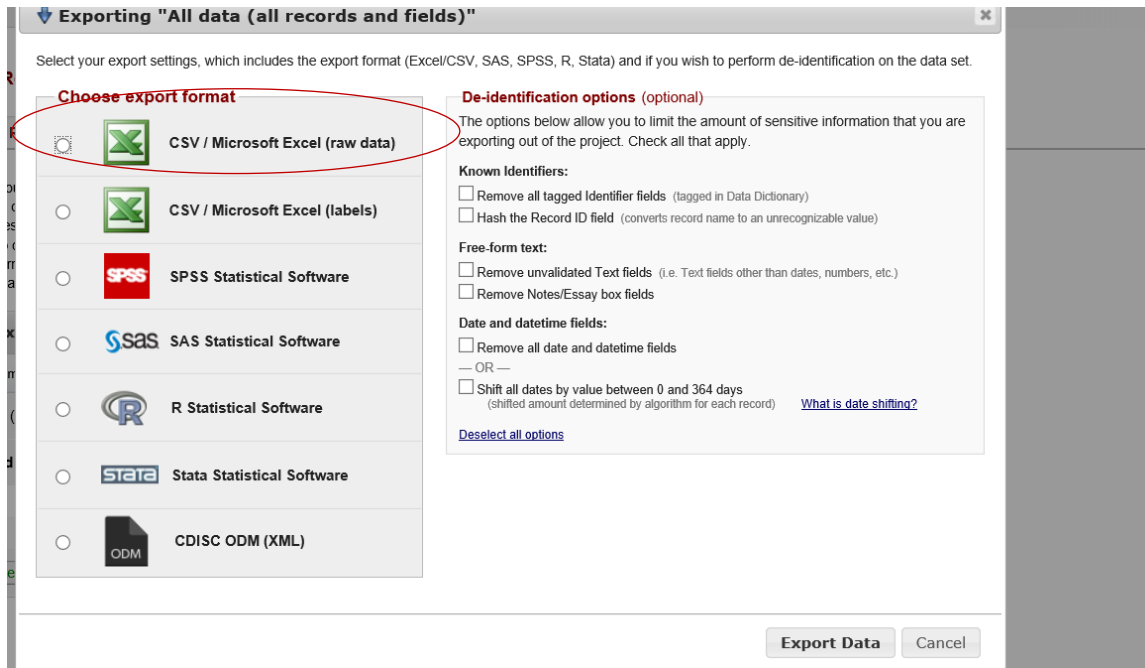
📊 Upload or download arms/events ▽

Arm 1: Arm 1 +Add New Arm

4. Export your data records from "Data Export, Reports, and Stats"
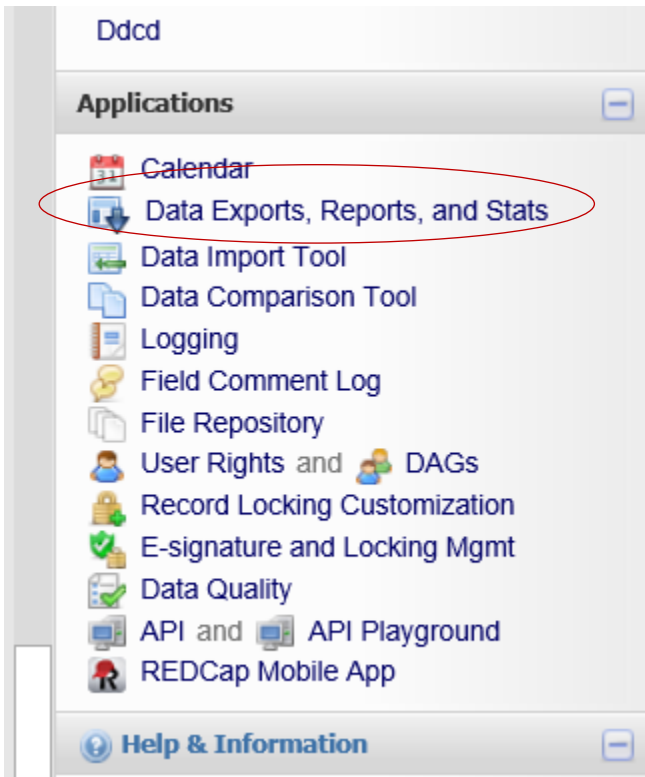
5. Export "All data" from Option A and choose export format as "CSV (raw data)"

Now you are ready to import all files into the new REDCap

6. Login to new REDCap (redcap.med.usc.edu) and create a new project
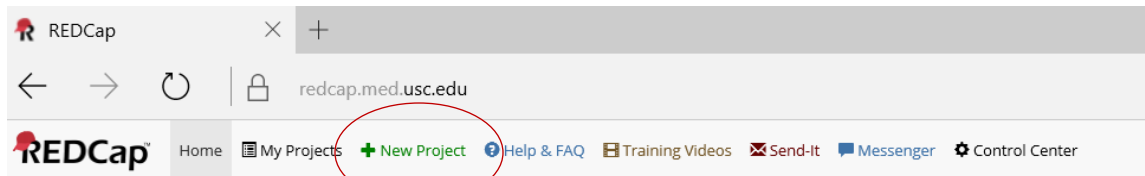
7. Fill in the project information and select "create an empty project (blank slate)"

8. In the "Project Setup" tab, click "Data Dictionary" and upload the CSV file you downloaded from step two

9. If your project has arms or events, please go to the "Project Setup" tab and enable "use longitudinal data collection with defined events"

Project status: ✏️ Development

Main project settings

In progress

[Enable] ⊖ Use longitudinal data collection with repeating forms? ?

[Enable] ⊖ Use surveys in this project? ?   🎬 VIDEO: How to create and manage a survey

[I'm done!]   [Modify project title, purpose, etc.]

10. Upload your "events/arms" in the "Define My Events"

Define your events and designate instruments for them

❌
Not started

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

Go to [Define My Events] or [Designate Instruments for My Events]

[I'm done!]

11. 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.
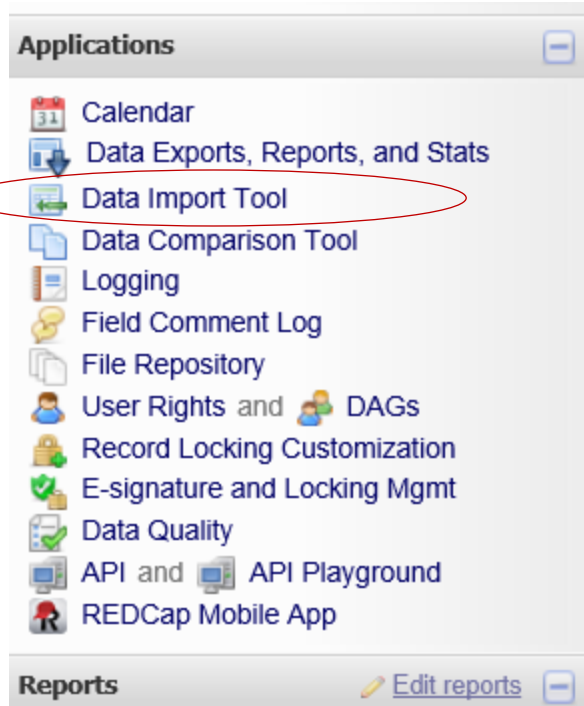
Note:

- If you have project related documents uploaded in the old REDCap, please download and transfer over them to the new REDCap from "File Repository".
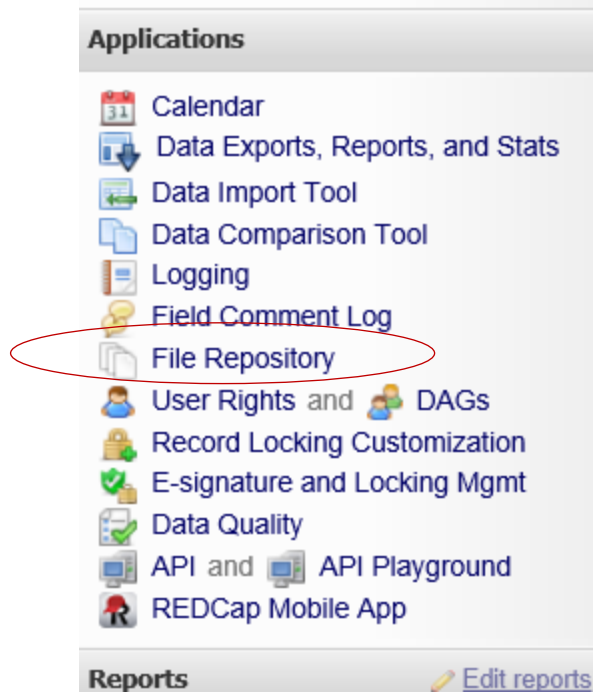
- Double check everything (data, surveys, arms, events, invitees, etc.) to ensure all you need has been transferred.
- Make sure to check your project setup to ensure all the same features have been enabled.

Please contact support@sc-ctsi.org, if you encounter any technical errors.