Copying Projects

CCTS Biostatistics Core

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Users with Full-Access (Creator or Owner) REDCap accounts can copy the structure, and optionally the data, of an existing REDCap project. If needed, begin by requesting a full-access account.

When to Copy Your Project or Instrument

Users can copy a project or instrument to reproduce some data collection process or to create a backup before making critical changes.

For example, you may need to copy a project or form to:

- Make critical changes to a project in production mode. Modifications to the original project require approval from the REDCap administrator, while changes to the copy can be made in real time.
- Reuse REDCap forms or settings for a new project.
- Split an existing project into multiple separate projects.
- Submit test data to a version of an active project without recording responses as real data.

Copy an Entire Project within REDCap

If the project you want to copy exists on the UIC CCTS REDCap server, you can copy it within REDCap.

Open the existing project that you wish to copy. Navigate to the “Other Functionality” tab. Click `Copy the project`.

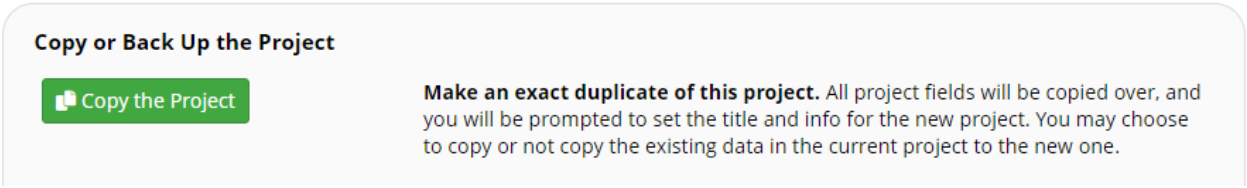

Figure 1: Copy the Project

Set the name and purpose of the new project. Use the checkboxes to indicate whether you want to copy existing data, user roles, reports, and other project settings. Then click `Copy Project`.

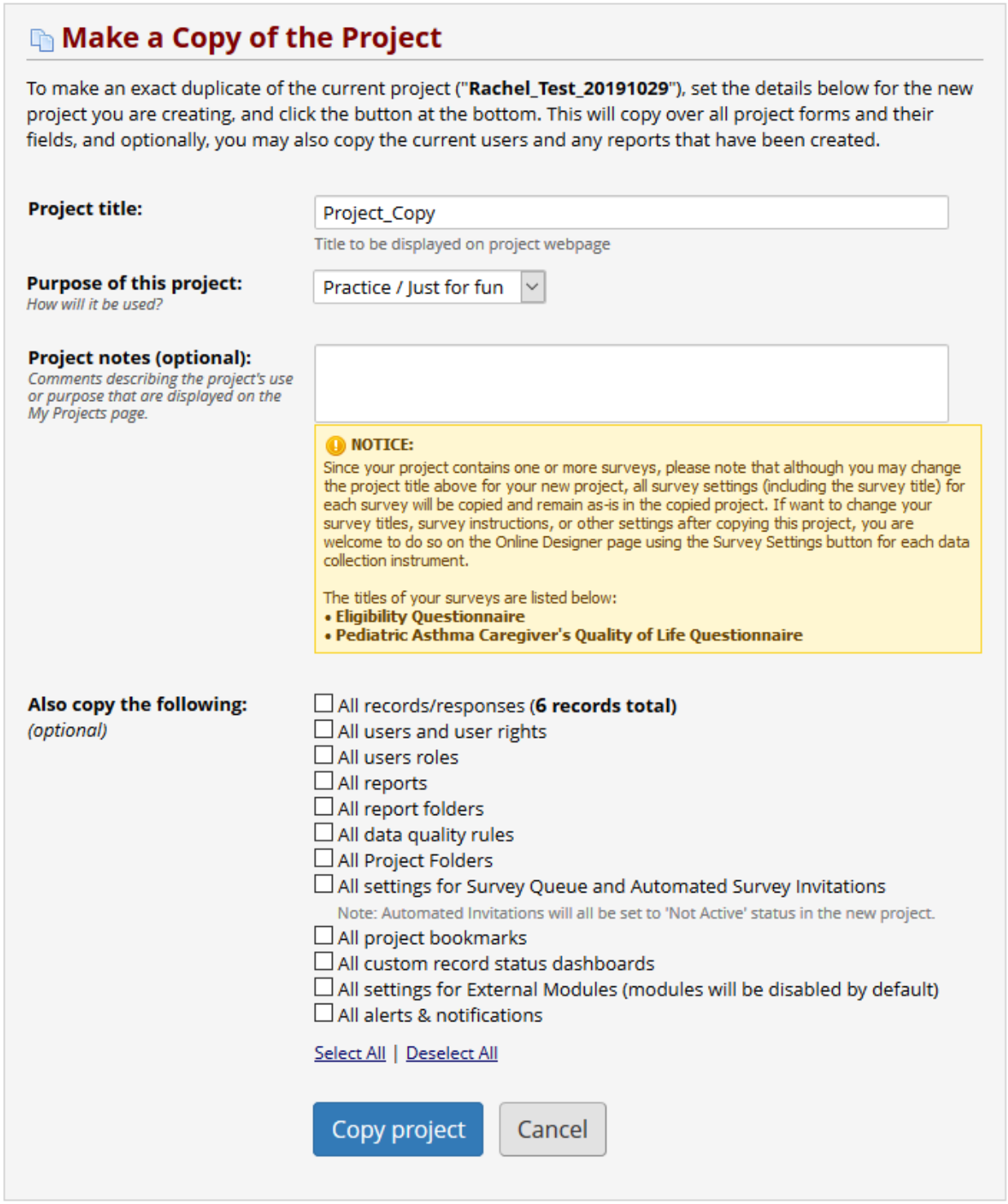

Figure 2: Make a copy

Clone a Project with XML

It's also possible to clone an existing project from any REDCap installation, including servers managed by other institutions, using an XML file.

Download the XML File

Open the existing project that you wish to copy. Navigate to the "Other Functionality" tab. Click either `Download metadata only (XML)` or `Download metadata & data (XML)`, depending on whether you want to include existing records along with the project's structure. Use the checkboxes to indicate which project settings you want to include in the XML file.

Figure 3: Download XML

Create the New Project

From your REDCap home page, click `+ New Project`.

Figure 4: Create a project

Enter the project name and select a purpose. Under "Project creation option:", select `Upload a REDCap project XML file (CDISC ODM format)`. Click `Choose File` to choose the XML file you downloaded in the previous step. Then click `Create project`.

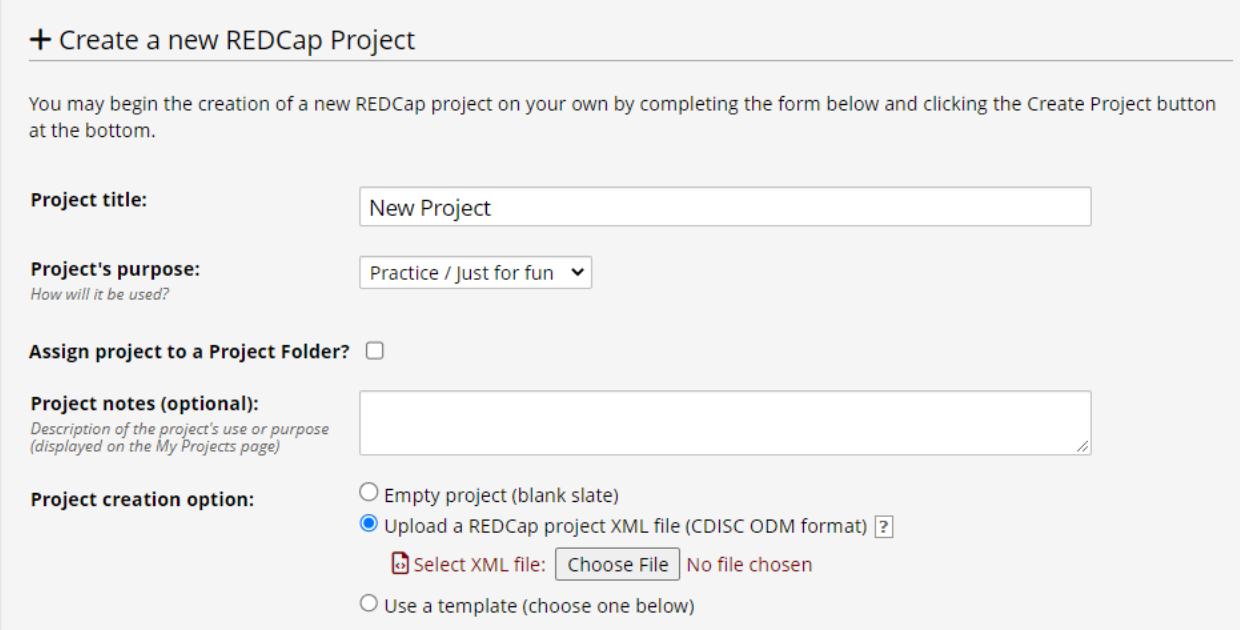

Figure 5: Create from XML

Copy Instruments

If you don't need to clone all project settings, you can copy one or more data collection instruments within or between projects.

Using the Online Designer

To recreate an individual data collection instrument, navigate to the Online Designer. Beside the instrument you want to copy, expand the `Instrument actions` menu and select `Download instrument ZIP`.

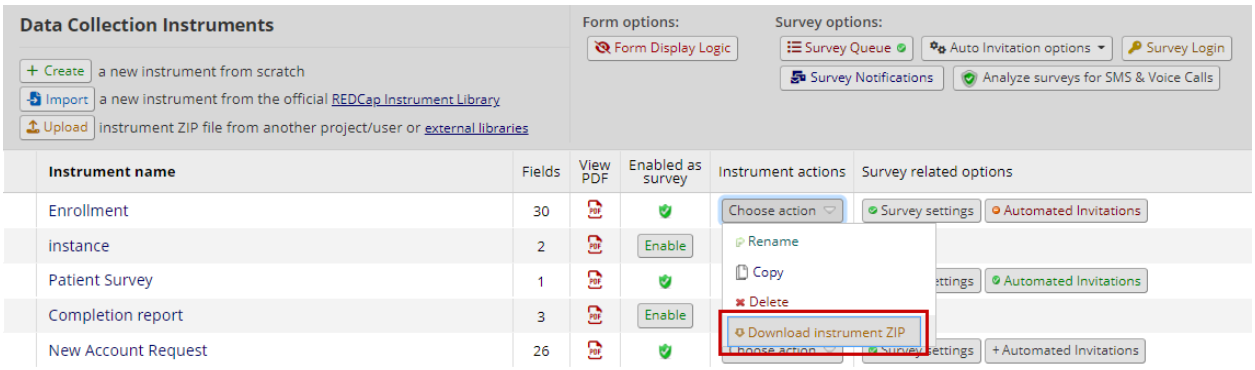

Figure 6: Download the instrument zip

Navigate to the project where you want to add the instrument. Open the Online Designer. Click `Upload`.

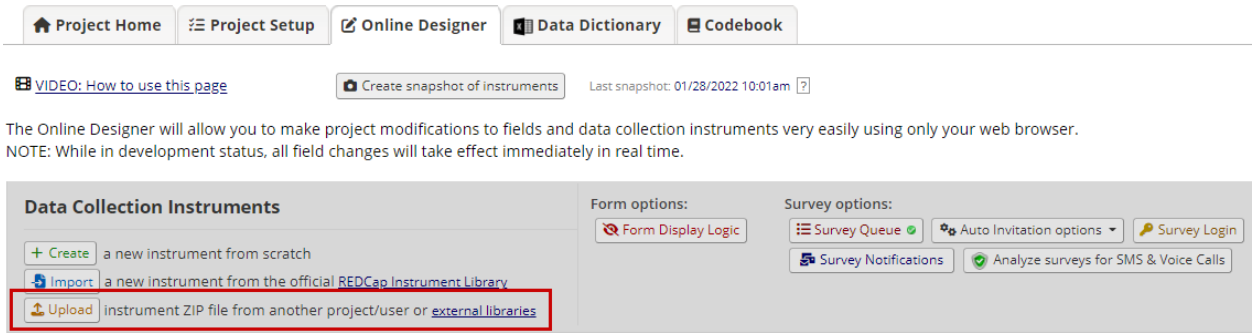

Figure 7: Open the uploader

Choose the ZIP file you downloaded in the last step and click `Upload instrument ZIP`.

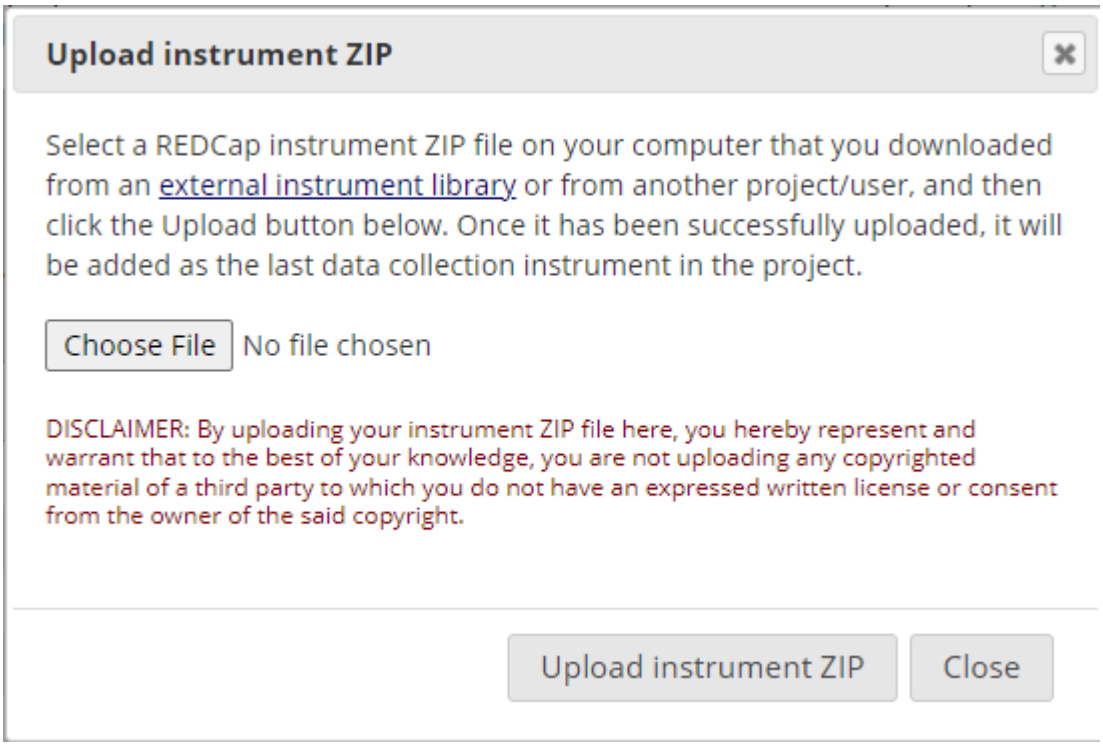

Figure 8: Choose and upload the instrument

Using the Data Dictionary

If you want to recreate all instruments in a project, you can use the Data Dictionary, a CSV file that defines instruments, fields, and field settings. Remember that the Data Dictionary defines instruments and field, but it does not contain project setup or module information like event definitions, reports, user rights, or randomization schemes.

To download the data dictionary from an existing project, navigate to the Data Dictionary tab. Click the green `Download the current Data Dictionary` link.

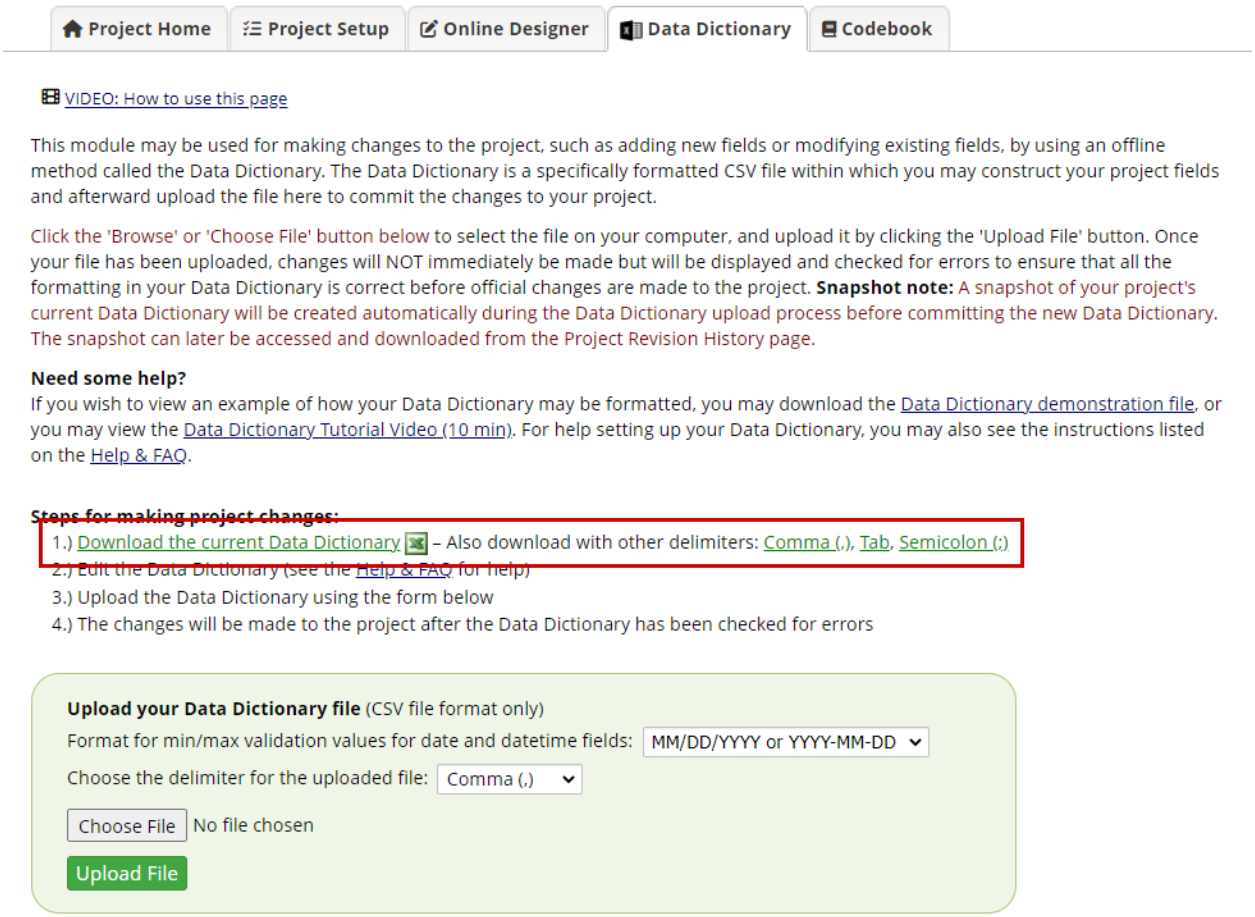

Figure 9: Download the data dictionary

Then open the project where you want to replicate the instruments. Navigate to the Data Dictionary tab. In the green box at the bottom, click `Choose File` and find the data dictionary you just downloaded. Then click `Upload File`.

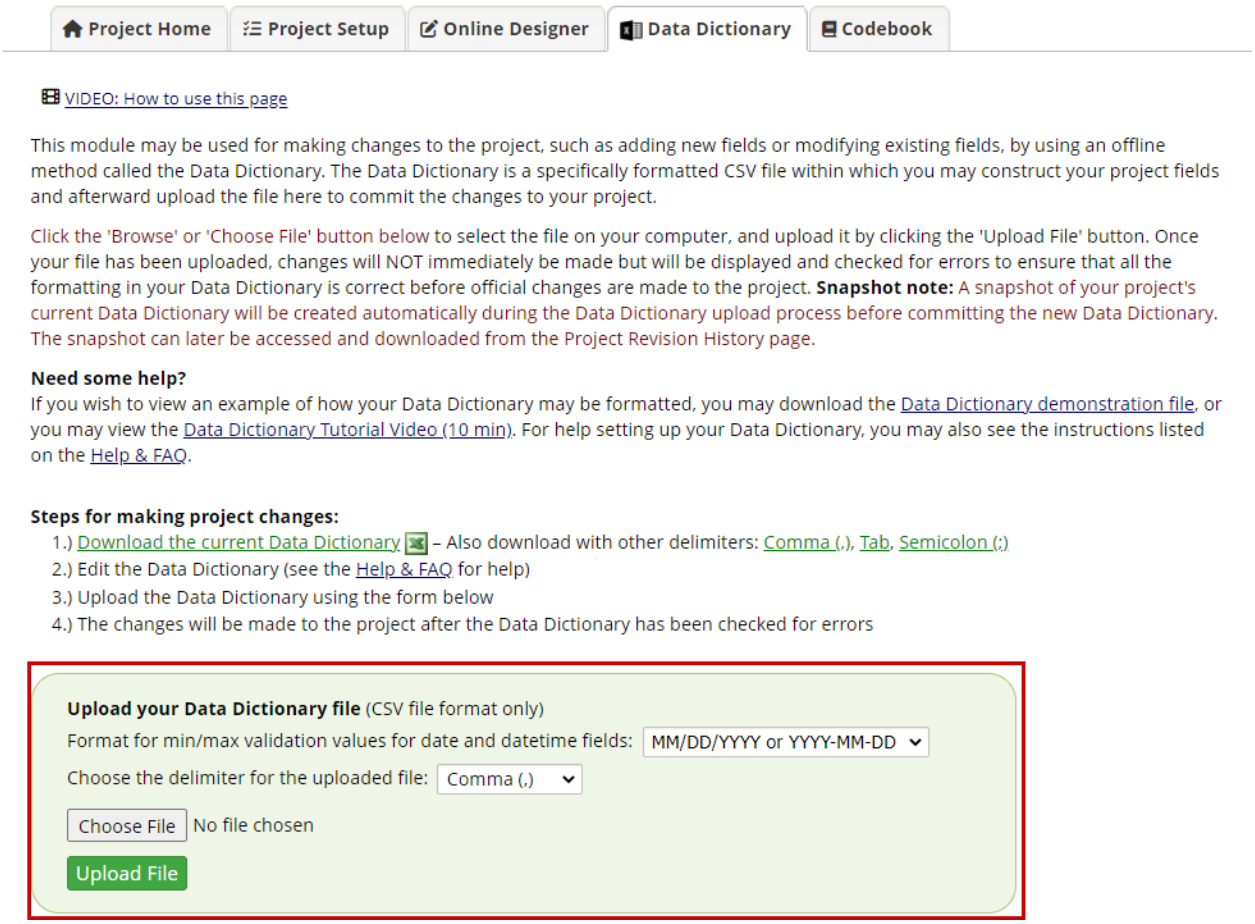

Figure 10: Upload the data dictionary