

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.

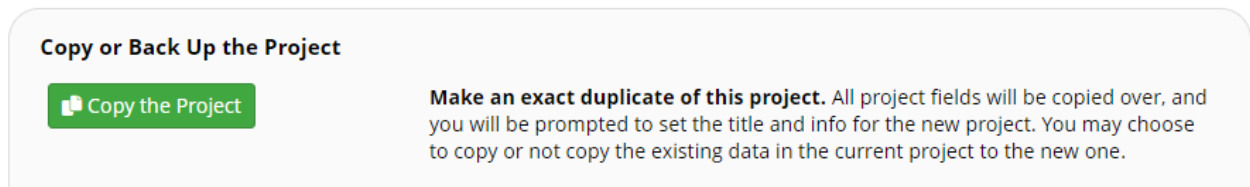



Figure 1: Copy the Project

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.

Make a Copy of the Project

To make an exact duplicate of the current project ("Rachel_Test_20191029"), set the details below for the new project you are creating, and click the button at the bottom. This will copy over all project forms and their fields, and optionally, you may also copy the current users and any reports that have been created.

Project title:
Title to be displayed on project webpage

Purpose of this project: 
How will it be used?

Project notes (optional):
Comments describing the project's use or purpose that are displayed on the My Projects page.

NOTICE:
Since your project contains one or more surveys, please note that although you may change the project title above for your new project, all survey settings (including the survey title) for each survey will be copied and remain as-is in the copied project. If want to change your survey titles, survey instructions, or other settings after copying this project, you are welcome to do so on the Online Designer page using the Survey Settings button for each data collection instrument.

The titles of your surveys are listed below:

- Eligibility Questionnaire
- Pediatric Asthma Caregiver's Quality of Life Questionnaire

Also copy the following: All records/responses (**6 records total**)
(optional)

All users and user rights

All users roles

All reports

All report folders

All data quality rules

All Project Folders

All settings for Survey Queue and Automated Survey Invitations

Note: Automated Invitations will all be set to 'Not Active' status in the new project.

All project bookmarks

All custom record status dashboards

All settings for External Modules (modules will be disabled by default)

All alerts & notifications

[Select All](#) | [Deselect All](#)

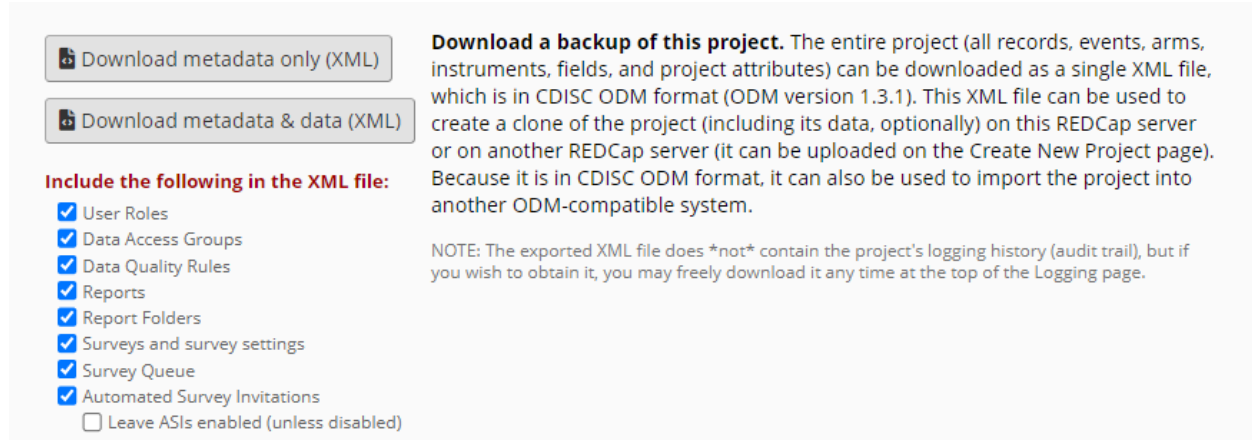
Figure 2: Make a copy

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.



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.

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.

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.

+ 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.

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) ?
- Use a template (choose one below)

Select XML file: No file chosen

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.

Data Collection Instruments

a new instrument from scratch
 a new instrument from the official [REDCap Instrument Library](#)
 instrument ZIP file from another project/user or [external libraries](#)

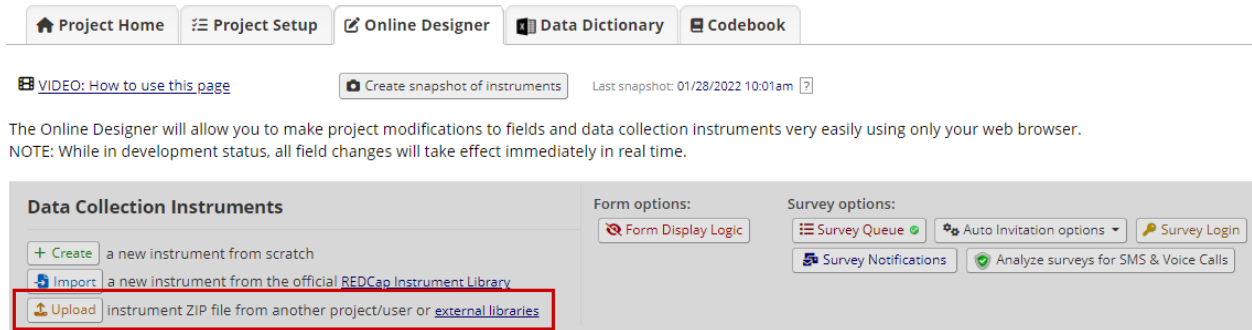
Form options:

Survey options:

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey related options
Enrollment instance	30		<input checked="" type="checkbox"/>	Choose action	<input checked="" type="checkbox"/> Survey settings <input checked="" type="checkbox"/> Automated Invitations
Patient Survey	2		<input type="checkbox"/> Enable	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Rename <input type="checkbox"/> Copy <input type="checkbox"/> Delete <input checked="" type="checkbox"/> Download instrument ZIP 	<input type="checkbox"/> Settings <input checked="" type="checkbox"/> Automated Invitations
Completion report	1		<input checked="" type="checkbox"/>	Choose action	<input checked="" type="checkbox"/> Survey settings <input checked="" type="checkbox"/> Automated Invitations
New Account Request	3		<input type="checkbox"/> Enable	Choose action	<input checked="" type="checkbox"/> Survey settings <input type="checkbox"/> Automated Invitations

Figure 6: Download the instrument zip

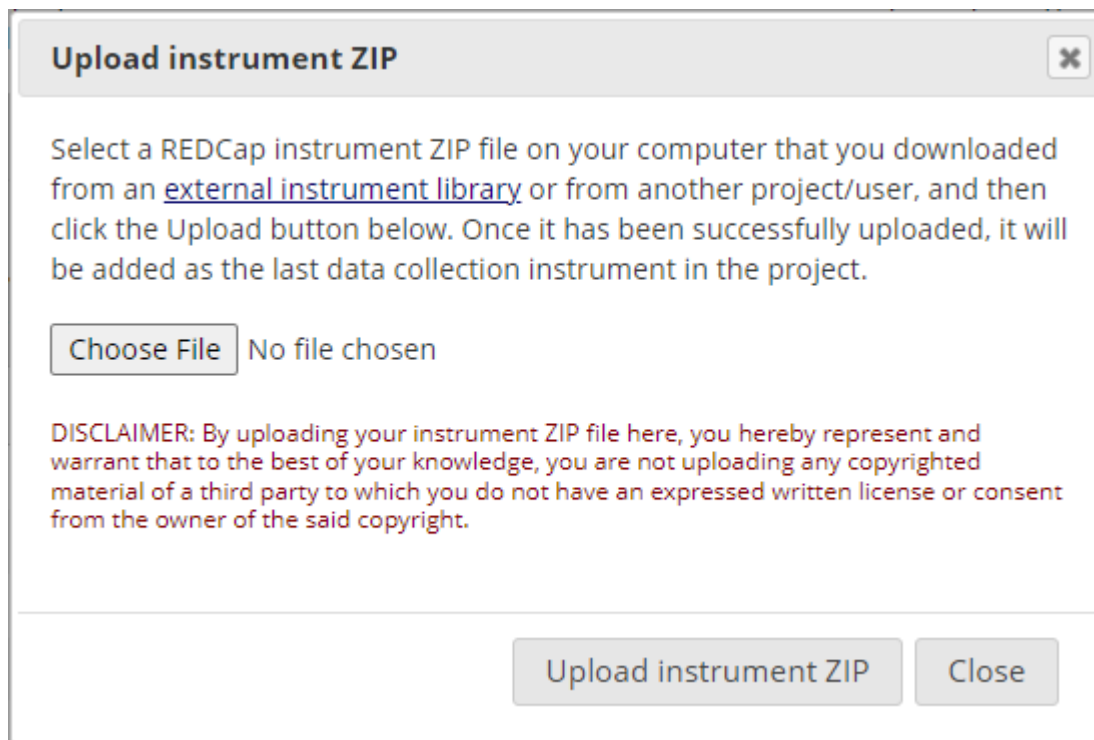
Navigate to the project where you want to add the instrument. Open the Online Designer. Click Upload.



The screenshot shows the top navigation bar with tabs for Project Home, Project Setup, Online Designer, Data Dictionary, and Codebook. Below the navigation bar, there is a video link and a 'Create snapshot of instruments' button. The main content area is titled 'Data Collection Instruments' and contains three options: '+ Create', 'Import', and 'Upload'. The 'Upload' option is highlighted with a red box. To the right, there are 'Form options' and 'Survey options' sections with various buttons like 'Form Display Logic', 'Survey Queue', 'Auto Invitation options', 'Survey Login', 'Survey Notifications', and 'Analyze surveys for SMS & Voice Calls'.

Figure 7: Open the uploader

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



The dialog box is titled 'Upload instrument ZIP' and has a close button in the top right corner. The main text reads: 'Select a REDCap instrument ZIP file on your computer that you downloaded from an [external instrument library](#) or from another project/user, and then click the Upload button below. Once it has been successfully uploaded, it will be added as the last data collection instrument in the project.' Below this text is a 'Choose File' button and the text 'No file chosen'. A disclaimer follows: 'DISCLAIMER: By uploading your instrument ZIP file here, you hereby represent and warrant that to the best of your knowledge, you are not uploading any copyrighted material of a third party to which you do not have an expressed written license or consent from the owner of the said copyright.' At the bottom of the dialog are two buttons: 'Upload instrument ZIP' and 'Close'.

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.

🏠 Project Home☰ Project Setup🔗 Online Designer📖 Data Dictionary📄 Codebook

📺 [VIDEO: How to use this page](#)

This module may be used for making changes to the project, such as adding new fields or modifying existing fields, by using an offline method called the Data Dictionary. The Data Dictionary is a specifically formatted CSV file within which you may construct your project fields and afterward upload the file here to commit the changes to your project.

Click the 'Browse' or 'Choose File' button below to select the file on your computer, and upload it by clicking the 'Upload File' button. Once your file has been uploaded, changes will NOT immediately be made but will be displayed and checked for errors to ensure that all the formatting in your Data Dictionary is correct before official changes are made to the project. **Snapshot note:** A snapshot of your project's current Data Dictionary will be created automatically during the Data Dictionary upload process before committing the new Data Dictionary. The snapshot can later be accessed and downloaded from the Project Revision History page.

Need some help?
If you wish to view an example of how your Data Dictionary may be formatted, you may download the [Data Dictionary demonstration file](#), or you may view the [Data Dictionary Tutorial Video \(10 min\)](#). For help setting up your Data Dictionary, you may also see the instructions listed on the [Help & FAQ](#).

Steps for making project changes:

- 1.) [Download the current Data Dictionary](#) - Also download with other delimiters: [Comma \(,\)](#), [Tab](#), [Semicolon \(;\)](#)
- 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:

Choose the delimiter for the uploaded file:

No file chosen

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**.

🏠 Project Home☰ Project Setup🔗 Online Designer📖 Data Dictionary📖 Codebook


📺 VIDEO: [How to use this page](#)

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Upload your Data Dictionary file (CSV file format only)

Format for min/max validation values for date and datetime fields:

Choose the delimiter for the uploaded file:

No file chosen

Figure 10: Upload the data dictionary