

Copying Projects and Forms in REDCap

When to copy your project or forms

Mostly, users can consider to copy a project or a form in order to make a backup and keep the original production project safe and unchanged before making critical changes, or to reproduce some data collection process. Copying a project can be done in 'Other Functionality' by the full-access account user with corresponding project level user rights. Also, in the Data Dictionary module by downloading and uploading the data dictionary a project can be reproduced. For copying only a form in Online Designer, the instrument zip file can be downloaded.

The following are examples of instances that may require copying a project or form:

- Critical project setups (e.g. defining events, linking/delinking events to forms, survey setups, ID setup) or data entry form modifications (e.g. adding or deleting fields and forms, branching logic) need to be made on a project that is already in production mode. Some of changes are not allowed in production and draft mode, but only super user (admin) can do it. I need to change many things in my data entry form and don't like to wait admin's approval for each change request. So, I'll copy the project and make the changes in the copied development project with some tests. When it finally looks ready, I'll update the forms and project setups at once in the original project, or use the copied project instead of my original project after moving it to production.
- I want to reuse other REDCap project and forms my collaborator made and bring it to my new project.
- There are forms in one project, but I need to split them into separate projects whether or not I will later merge them. For this, I need to copy selected forms and upload it on a new blank project.
- I have multiple survey forms and each of them should be sent out using public survey link. Since only the first survey form is used for the public link, I would like to split the survey forms into separate projects.
- I want to test my production project by entering some records before making some changes but don't want to show it to my production project as some other users pull the data for tracking reports any time.

Different ways of copying projects or forms:

1) Copy the whole project in Other Functionality

- First, you must be a Full-Access user in our CCTS REDCap system to copy the project. If you have Access-Only account with no access to create a new project, you can't copy a project. If you need to upgrade your user account to full-access level, please submit the request through CCTS service request page.
- When you have a full-access account, check your user right has the access to Project Setup in the project that you like to copy. Only users who have access to Project Setup can copy the project. (see the screen shot below)

Go to User Rights:

| | Data Entry Rights | | | | |
|--|---|---|---|---|---|
| (M/D/Y) | NOTE: The data entry r ability to view or edit d (e.g., data entry forms imports or data exports | rights *or ata on a , reports; 5. | nly* per web pa). It has | rtain to Ige in R s no effi | a user's EDCap ect on da |
| | | No Access | Read Only | View & Edit | Edit survey respons |
| | Demographics (survey) | | \bigcirc | ۲ | |
| | Baseline Data (survey) | | | ۲ | √ |
| vileges for data exports (including PDFs and API exports). | | \bigcirc | \bigcirc | ۲ | |
| | Month 2 Data | | | ۲ | |
| No Access | Month 3 Data | | \bigcirc | ۲ | |
| De-Identified* Remove all tagged | Completion Data | | | ۲ | |
| | (M/D/Y) | A Data Entry Rights NOTE: The data entry forms ability to view or edit d ability to view or edit ability box of the data entry forms ability to view or edit ability abil | Image: Construction of the system Image: Construction of the system | Image: Constraint of the second se | Image: Data Entry Rights Data Entry Rights NOTE: The data entry rights "only" pertain to a web page in R (e.g., data entry forms, reports). It has no efficiency forms, reports and the efficie |



Click 'Project Setup' → 'Other Functionality'



Select copying options to decide whether bring all records entered, user setups, reports and other project setups to replicate or not. (See the screen shot below)

| To make an exact duplicate of for the new project you are cre and their fields, and optionally | the current project ("FOM_Survey_data entry form first"), set the details below eating, and click the button at the bottom. This will copy over all project forms , you may also copy the current users and any reports that have been created. |
|--|--|
| Project title: | FOM_Survey_data entry form first |
| | Title to be displayed on project webpage |
| Purpose of this project: How will it be used? | Practice / Just for fun 🔹 |
| Project notes (optional): Comments describing the project's us or purpose that are displayed on the My Projects page. | r |
| | Since your firstering of the second s |
| Also copy the following: (aptional) | All records/responses (1 records total) All users and roles All reports All report folders All report folders All report folders All Project Folders All project Folders All project bookmarks Note Automated Indiations will all be set to Tot Achier status in the new project. All project bookmarks |

2) Copy only selected forms using zip file option in Online Designer

Download instrument ZIP and Upload.

| Project Home | i≣ Project Setup | Sonline Designer | 📑 Da | ta Dictionar | У | |
|--------------------|---|---|----------------------------|--|--|--|
| Online Designer wi | ll allow you to make p hile in development s | project modifications to tatus, all field changes v | Create fields ar rill take | i snapshot of in Last snapsho nd data collec effect immed | truments Vi c: never ? tion instruments ve iately in real time. | DEO: How to use this page |
| Data Collection | Survey options: | P Survey Login | Id new in Create | nstrument: a new instrum s new instrum instrument Z | eent from scratch nent from the official IP file from another p | BEDCap Shared Library 📦 |
| Instrument name | • | Fields | View | Enabled as survey | Instrument actions | Survey-related options |
| Demographics | | 25 | - | * | Choose action 🗢 | Survey settings + Automated Invitation |
| Baseline Data | | 18 | - | 0 | Choose action 🗢 | Survey settings + Automated invitation |
| Month 1 Data | | 19 | - | Enable | Choose action 🤝 | |
| Month 2 Data | | 19 | - | Enable | P Rename | |
| Month 3 Data | | 27 | - | Enable | Сору | |
| Completion Data | | 6 | | Englie | A Delete | |



3) Create a same project using Data Dictionary

Click Project Setup \rightarrow Data Dictionary and you can download or upload the data dictionary. After you download a data dictionary from the REDCap project you have access, or someone gives you the data dictionary file (.csv), you can upload it to a new or existing project to have the same project. Remember a data dictionary only contains forms/fields but no entered data and no project setups such as longitudinal events definition, reports, user rights, etc.

| | i= Project Setup | nline Designer | 🗃 Data Dictionary | |
|--|---|--|--|--|
| | | | | VIDEO: How to use this pa |
| is module will allow ing the Online Desi signer may help you ore helpful if you wil | you to create new dat. g ner or Upload Data I u get some initial fields I be adding a large nur | a collection instruments/ Dictionary (see tabs abo i/forms built quickly or to mber of fields for this pro | surveys or edit existing ve), in which you may make quick edits, but ject. | g ones. Changes may be made by either use either method or both. The Online using the Data Dictionary file may be |
| his module may be u fline method called t nu may construct you | sed for making change he Data Dictionary. Th ir project fields and aft | es to the project, such as ne Data Dictionary is a sp terward upload the file h | adding new fields or m ecifically formatted CS ere to commit the char | nodifying existing fields, by using an V (comma delimited) file within which nges to your project. |
| Ick the 'Browse' or 'C nce your file has bee hat all the formatting your project's current ne new Data Dictiona | hoose File' button belo n uploaded, changes v in your Data Dictionar nt Data Dictionary will ry. The snapshot can la | ow to select the file on yo will NOT immediately be r y is correct before officia be created automatically ater be accessed and dow | ur computer, and uple made but will be displa l changes are made to during the Data Dictio vnloaded from the Pro | bad it by clicking the 'Upload File' buttor iyed and checked for errors to ensure the project. Snapshot note: A snapsho nary upload process before committing ject Revision History page. |
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Note: All Screen shots are from REDCap version 8.9.2