

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:

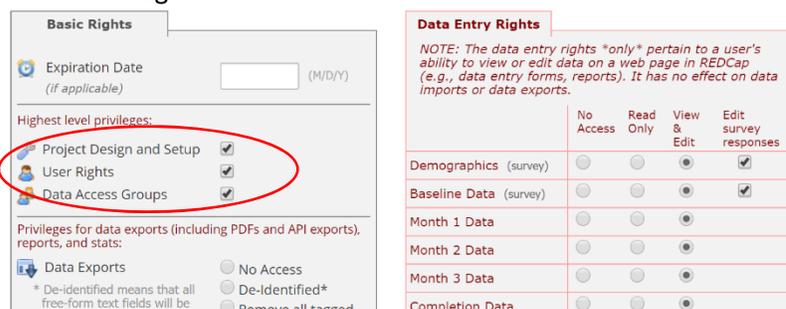
- Critical project setups (e.g. defining events, linking/delinking events to forms, survey setups, ID setup) or data entry form modifications (e.g. adding or deleting fields and forms, branching logic) need to be made on a project that is already in production mode. Some of changes are not allowed in 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:



Basic Rights

Expiration Date (if applicable) (M/D/Y)

Highest level privileges:

- Project Design and Setup
- User Rights
- Data Access Groups

Privileges for data exports (including PDFs and API exports), reports, and stats:

Data Exports: No Access, De-Identified*, Remove all tagged

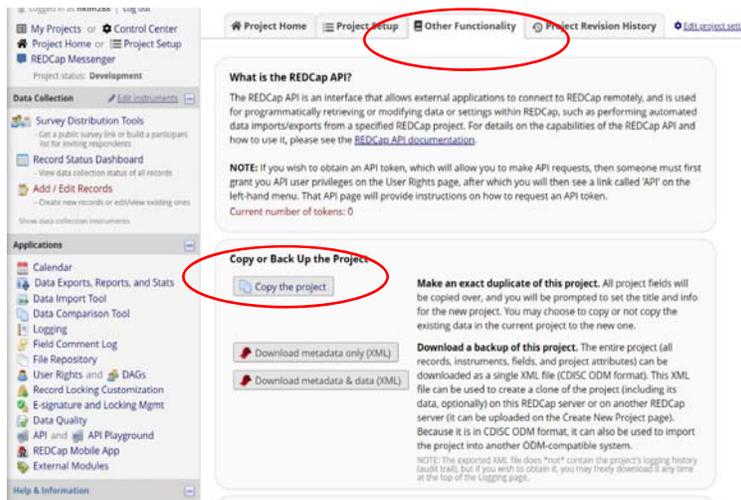
* De-identified means that all free-form text fields will be

Data Entry Rights

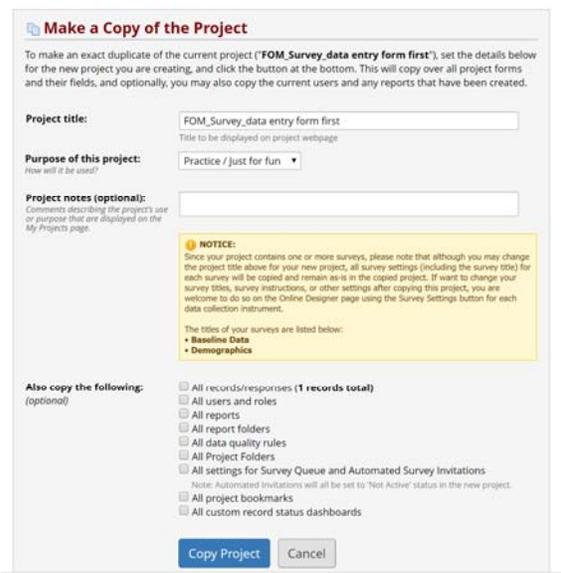
NOTE: The data entry rights *only* pertain to a user's ability to view or edit data on a web page in REDCap (e.g., data entry forms, reports). It has no effect on data imports or data exports.

	No Access	Read Only	View & Edit	Edit survey responses
Demographics (survey)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>
Baseline Data (survey)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>
Month 1 Data	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	
Month 2 Data	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	
Month 3 Data	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	
Completion Data	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	

Click 'Project Setup' → 'Other Functionality'

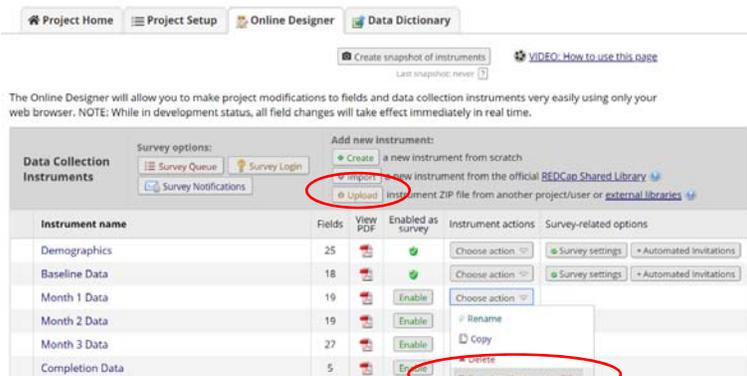


Select copying options to decide whether bring all records entered, user setups, reports and other project setups to replicate or not. (See the screen shot below)



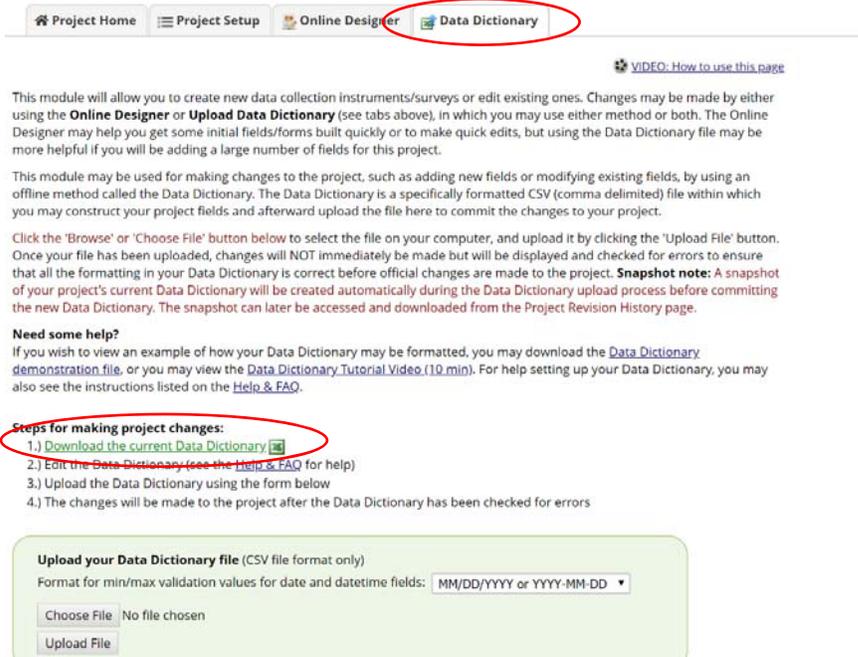
2) Copy only selected forms using zip file option in Online Designer

Download instrument ZIP and Upload.



3) Create a same project using Data Dictionary

Click Project Setup → 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.



The screenshot shows the REDCap interface with the 'Data Dictionary' tab selected. The page contains the following content:

- Navigation tabs: Project Home, Project Setup, Online Designer, **Data Dictionary** (circled in red).
- Video link: VIDEO: How to use this page
- Text: This module will allow you to create new data collection instruments/surveys or edit existing ones. Changes may be made by either using the **Online Designer** or **Upload Data Dictionary** (see tabs above), in which you may use either method or both. The Online Designer may help you get some initial fields/forms built quickly or to make quick edits, but using the Data Dictionary file may be more helpful if you will be adding a large number of fields for this project.
- Text: 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 (comma delimited) file within which you may construct your project fields and afterward upload the file here to commit the changes to your project.
- Text: 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.
- Section: **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](#).
- Section: **Steps for making project changes:** (circled in red)
 - 1.) [Download the current Data Dictionary](#) (circled in red)
 - 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
- Form: **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 ▾
Buttons: Choose File (No file chosen), Upload File

Note: All Screen shots are from REDCap version 8.9.2