

REDCap - Steps to move a record from one project to another project

****For the process detailed below, the variable names and form names must be identical****

****Before beginning this process, confirm the record number being transferred does NOT already exist in the new project****

Step 1

- Within the project containing the record currently, create a report for the specific record (to include all the fields to be transferred with the record). Add a filter to the report to only pull in the information for the record to be transferred. Once the report is created, click Save.

Data Exports, Reports, and Stats [VIDEO: How to use Data Exports, Reports, and Stats](#)

[+ Create New Report](#) [My Reports & Exports](#) [PDF & Other Export Options](#)

You may create a new report by selecting the fields/variables below that you want to include in the report. You may add as many fields to your report as you wish, and you can choose which users may view this report. You will also need to provide a name for your report, which will then be displayed on the project's left-hand menu for anyone to whom you have given access. You can filter the results returned in the report in a variety of ways, including using complex AND/OR logic. When you are finished, click the Save Report button at the bottom. The new report will then be added to your list of reports, after which you may immediately begin viewing them or exporting them.

Name of Report: Data Transfer of Record #7

STEP 1

User Access: Choose who sees this report on their left-hand project menu [?](#)

All users - OR - Custom user access (Choose specific users, roles, or data access groups who will have access)

STEP 2

Fields to include in report [Quick Add](#) Add all fields from selected instrument: -- choose instrument --

Field	Field Name	Instrument	Action
Field 1	record_id "Login Identification"	Demographics	✗
Field 2	name "Full Name"	Demographics	✗
Field 3	email "email address"	Demographics	✗
Field 4	dob "DOB"	Demographics	✗
Field 5	candy "What kind of candy do you like?"	Demographics	✗
Field 6	demographics_complete "Complete?"	Demographics	✗
Field 7	date "Date"	Daily Diaries	✗

STEP 3

Show data for all events for each record returned [?](#) [How to use filters and AND/OR logic](#)

Filters (optional)

Filter	Field	Operator	Value	Action
Filter 1	record_id "Login Identification"	=	7	✗
	in All events			
	AND			
Filter 2	-- select a field --	=		
	in All events			

[Switch format: Use advanced logic](#)

Step 2

- Once the Report is saved, click on *Export* and download the report in raw format. Save the data to your computer.

Exporting "Data Transfer of Record #7"

Select your export settings, which includes the export format (Excel/CSV, SAS, SPSS, R, Stata) and whether or not to perform de-identification on the data set.

Choose export format

- CSV / Microsoft Excel (raw data)**
- CSV / Microsoft Excel (labels)**
- SPSS Statistical Software**
- SAS Statistical Software**
- R Statistical Software**
- Stata Statistical Software**

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](#)

Export Data Cancel

Step 3

- Log into the project that the data will be transferred into. Click on the *Data Import Tool*. Please note the instructions.

Data Collection

- Manage Survey Participants
- Scheduling
- Record Status Dashboard
- Add / Edit Records

Applications

- Calendar
- Data Exports, Reports, and Stata**
- Data Import Tool**
- Data Comparison Tool
- Logging
- Field Comment Log
- File Repository
- User Rights and DAGs
- Record Locking Customization
- E-signature and Locking Mgmt
- Data Quality
- API and API Playground

Help & Information

- Help & FAQ
- Video Tutorials
- Suggest a New Feature

If you are experiencing problems, please contact your REDCap administrator.

Data Import Tool

This module may be used for importing data into this project from a CSV (comma delimited) file. Below are the steps you will need to follow in order to import your data successfully into this project.

NOTICE: This project is currently in Development status. Real data should NOT be entered until the project has been moved to Production status.

Instructions:

- Click the link below to download your data import template as a CSV (comma delimited) file. Save it locally to your computer and then open it to begin filling it with the data you wish to import.
 - [Download your Data Import Template \(with records in rows\)](#)
 - OR
 - [Download your Data Import Template \(with records in columns\)](#)
- In each column of the Data Import Template file that you downloaded, place the data for each record that you wish to import. Once all your data has been added, save the file.
 - Be sure not to change the Variables/Field Names in the file or an error may occur.
 - Also, for all of the 'dropdown' or 'radio' fields in the project, you must make sure that the numerical value (rather than the text value) is entered in those cells, or else it cannot be processed.
 - 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.
- 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, the data will NOT be immediately imported but will be displayed and checked for errors to ensure that all the data is in correct format before it is finally imported into the project.

How to import records for events:
In order to import records for longitudinal projects such as this one, you must use the 'redcap_event_name' field in your data import file, in which you will provide a unique event name for each record. This will tell it which event that the data belongs to for that record. A list of all the unique names are listed on the [Define My Events](#) page. If the 'redcap_event_name' field is not specified for every record being imported, it will display an error.

Record format: The file to be uploaded has its records stored as separate Rows

Format for date and datetime values: MM/DD/YYYY or YYYY-MM-DD

Allow blank values to overwrite existing saved values? No, ignore blank values in the CSV file (default)

Upload your CSV file:

Choose File | No file chosen

Upload File

Step 4

- If the project that the data is being transferred from has the same variable names and form names as the project the data is being transferred into, then click on *choose file* to upload the data you extracted in Step 2. Once the file is selected, click on *upload file*.

Record format: The file to be uploaded has its records stored as separate

Format for date and datetime values:

Allow blank values to overwrite existing saved values?

Unload your CSV file:

No file chosen

Step 5

- You should receive a notice saying: ‘Your document was uploaded successfully and is ready for review.’ The Instructions for data review are noted on this REDCap screen. Review the import of data and confirm the import is to the correct variable names.

Your document was uploaded successfully and is ready for review.
You are now required to view the Data Display Table below to approve all the data before it is officially imported into the project. Follow the instructions below.

Instructions for Data Review

The data you uploaded from the file is displayed in the Data Display Table below. Please inspect it carefully to ensure that it is all correct. After reviewing it, click the 'Import Data' button at the bottom of this page to import this data into the project.

KEY for Data Display Table below

- Black text = New Data
- Gray text = Existing data (will not change)
- (Red text) = Data that will be overwritten
- Red box = error
- Orange box = warning

DATA DISPLAY TABLE

record_id	redcap_event_name	name	email	dob	candy	demographics_complete	date	sleep	leg	daily
7 (new record)	baseline_arm_1	Data Transfer Test Record 7	abc@342.com	8091945	5	2				
7 (new record)	12_day_prior_to_su_arm_1									
7 (new record)	2_week_post_surger_arm_1									

Do you wish to import the new data (displayed above) into the project?
(Click the button below to import the data.)

Step 6

- If the import is correct, click on *Import Data* to complete the process.

Do you wish to import the new data (displayed above) into the project?
 (Click the button below to import the data.)

If the import was successful, you will receive a successful notice.

Import Successful! 3 records were created or modified during the import.

The data you uploaded from the file was successfully imported into the project. If you wish to import more data, you may use the box above to select another file on your computer.

Step 7

- Navigate to the Record Status Dashboard and locate the imported record. Verify the information was imported to the correct variable names and forms.

Data Collection [Edit instruments](#)

Manage Survey Participants
- Get a public survey link or build a participant list for inviting respondents

Scheduling
- Generate schedules for the calendar using your defined events

Record Status Dashboard
- View data collection status of all records

Add / Edit Records
- Create new records or edit/view existing ones

Applications

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Record Status Dashboard (all records)

Displayed below is a table listing all existing records/responses and their status for every data collection instrument (and if longitudinal, for every event). You may click any of the colored buttons in the table to open a new tab/window in your browser to view that record on that particular data collection instrument. Please note that if your form-level user privileges are restricted for certain data collection instruments, you will only be able to view those instruments, and if you belong to a Data Access Group, you will only be able to view records that belong to your group.

Legend for status icons:

● Incomplete ● Incomplete (no data saved) ● Unverified ● Partial Survey Response ● Complete ● Completed Survey Response

Displaying record "1" through "mmh8541" of 14 records

Displaying: [Instrument status only](#) | [Lock status only](#) | [All status types](#)

Login Identification	Demographics Baseline	Treatment Survey Baseline	Treatment Survey 1-2 day prior to surgery	Daily Diaries 1	Daily Diaries 2	Daily Diaries 3	Daily Diaries 4	Treatment Survey 2 week post surgery
1 Mary Heart	●	●	●	●	●	●	●	●
2 Abc	●	●	●	●	●	●	●	●
3 Mary Moore	●	●	●	●	●	●	●	●
4	●	●	●	●	●	●	●	●
5 All In One	●	●	●	●	●	●	●	●
6 Data Transfer Test	●	●	●	●	●	●	●	●
7 Data Transfer Test Record 7	●	●	●	●	●	●	●	●

Contact ctsiredcap@wakehealth.edu immediately if the information was imported incorrectly.