

REDCap - Steps to move a project from the Internal Database to the External Database [\(with data\)](#)

Step 1

- Log into the project on the Internal database. Navigate to the *Project Setup* tab and select the *Data Dictionary*.

Project Home | **Project Setup** | Other Functionality | Project Revision History

Project status: Development Completed steps 0 of 7

Main project settings

Disable Use surveys in this project? [?](#) [VIDEO: How to create and manage a survey](#)

Enable Use longitudinal data collection with defined events? [?](#)

[I'm done!](#)

[Modify project title, purpose, etc.](#)

Design your data collection instruments & enable your surveys

Add or edit fields on your data collection instruments (survey and forms). This may be done by either using the Online Designer (online method) or by uploading a Data Dictionary (offline method). You may then enable your instruments to be used as surveys in the Online Designer. Quick links: [Download PDF of all instruments](#) OR [Download the current Data Dictionary](#)

Go to [Online Designer](#) or **[Data Dictionary](#)** Explore the [REDCap Shared Library](#)

Have you checked the [Check For Identifiers](#) page to ensure all identifier fields have been tagged?

Learn how to use [Smart Variables](#) [Piping](#) [@ Action Tags](#)

- Selecting the Data Dictionary will open a new tab. Please follow Step 1 within the image below to download the Data Dictionary. Save the file to your computer.

Project Home | Project Setup | **Online Designer** | **Data Dictionary**

[VIDEO: How to use this page](#)

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.

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.

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.

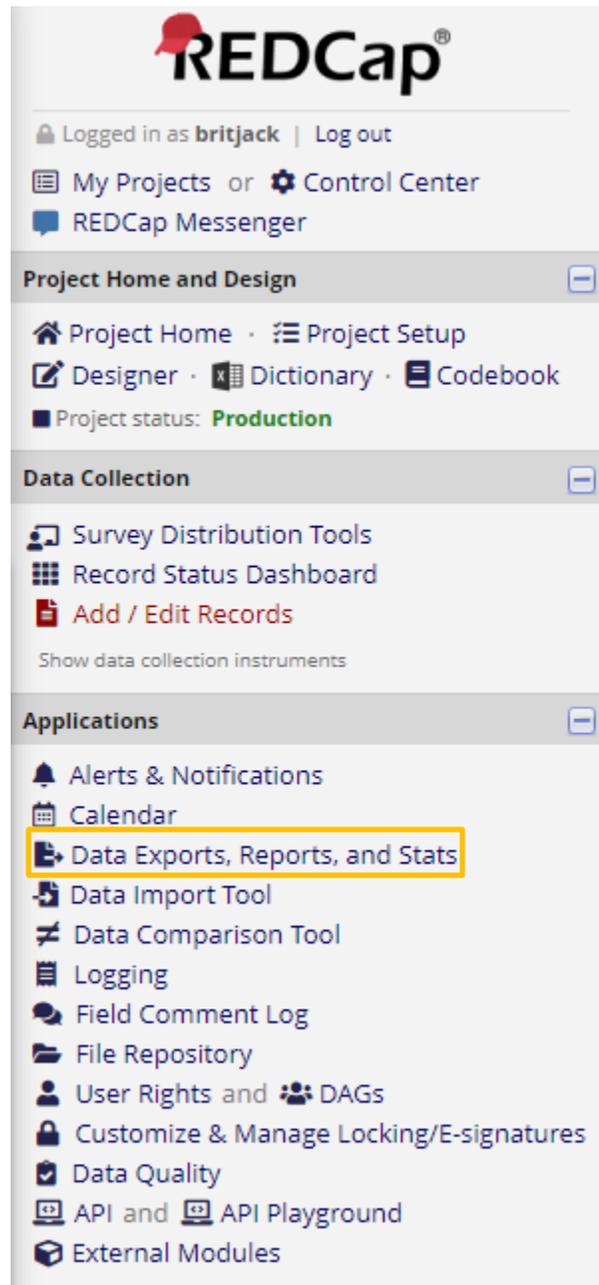
Need some help?
If you wish to view an example of how your Data Dictionary may be formatted, you may download the [Data Dictionary demonstration file](#), or you may view the [Data Dictionary Tutorial Video \(10 min\)](#). For help setting up your Data Dictionary, you may also see the instructions listed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

Steps for making project changes:

- 1.) [Download the current Data Dictionary](#)

Step 2

- To download the data from the current project, navigate to the *Data Exports, Reports, and Stats* hyperlink on the left-hand side.



- This hyperlink will open the *My Reports & Exports* tab. Locate the *All Data* report and select the *Export Data* button.

This module allows you to easily view reports of your data, inspect plots and descriptive statistics of your data, as well as export your data to Microsoft Excel, SAS, Stata, R, or SPSS for analysis (if you have such privileges). If you wish to export your *entire* data set or view it as a report, then Report A is the best and quickest way. However, if you want to view or export data from only specific instruments (or events) on the fly, then Report B is the best choice. You may also create your own custom reports below (if you have such privileges) in which you can filter the report to specific fields, records, or events using a vast array of filtering tools to make sure you get the exact data you want. Once you have created a report, you may view it as a webpage, export it out of REDCap in a specified format (Excel, SAS, Stata, SPSS, R), or view the plots and descriptive statistics for that report.

My Reports & Exports			
	Report name	View/Export Options	Management Options
A	All data (all records and fields)	View Report Export Data Stats & Charts	
B	Selected instruments and/or events (all records)	Make custom selections	
+ Create New Report			

- Choose the *CSV/Microsoft Excel (raw data)* export format. Select to *Export Data*. Save the file to your computer.

Exporting "All data (all records and fields)"

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?](#)

[Deselect all options](#)

Export Data
Cancel

Step 3

- While remaining in the project, navigate to the *My Projects* hyperlink on the left-hand side of the page. At this point, the user will need to create a new project on the External database.
- To create the project on the External database, click on the *My Projects* dropdown, then select *New Project*. Review the REDCap Usage Agreement and select 'I Agree' to continue. Select *REDCap External* database.



Create a REDCap Project

Choose the right REDCap System

If you have any questions about which system to use, please visit our [REDCap System Comparison](#) page or [email us](#).

REDCap External

- Your project has been approved by the IRB, and you will work with collaborators outside of the Wake Forest Baptist Health network ¹
- You have a public survey that will be completed outside of the Wake Forest Baptist Health network ¹

[Use REDCap External](#)

REDCap Internal

- All other projects

[Use REDCap Internal](#)

Step 4

- The user will need to recreate the project on the External database by using the Data Dictionary and data from the Internal project.
- To begin this process, please enter the basic project information on the *Create a REDCap External Project* page.
 - Note: for the question noted below, please choose: *Create an empty project (blank slate)*

The screenshot shows a question: 'Start project from scratch or begin with a template?'. There are two radio button options: 'Use a template (choose one below)' and 'Create an empty project (blank slate)'. The 'Create an empty project (blank slate)' option is selected.
 - All other questions on this page should be answered as they relate to the project.
- Once all the required information has been entered, please choose **SAVE & PROCEED**.

Step 5

- The system will open the project to the *Project Setup* tab. Navigate to the *Design your data collection instruments & enable your surveys* section and select *Data Dictionary*.

Project Home | Project Setup | Other Functionality | Project Revision History

Project status: Development Completed steps 0 of 7

Not started

Main project settings

Use surveys in this project?

Use longitudinal data collection with defined events?

[VIDEO: How to create and manage a survey](#)

Not started

Design your data collection instruments & enable your surveys

Add or edit fields on your data collection instruments (survey and forms). This may be done by either using the Online Designer (online method) or by uploading a Data Dictionary (offline method). You may then enable your instruments to be used as surveys in the Online Designer. Quick links: [Download PDF of all instruments](#) OR [Download the current Data Dictionary](#)

Go to or Explore the

- Selecting the Data Dictionary will open a new tab. Select *Choose File* to search for the Data Dictionary saved to your computer from Step 1. This step will import the Data Dictionary into the newly created external project.

Upload your Data Dictionary file (CSV file format only)

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

No file chosen

- The system will notify the user of a successful upload and then ask a confirmation question to ensure the user wants to commit to the changes.

[Project Setup](#)
[Online Designer](#)
[Data Dictionary](#)

 [VIDEO: How to use this page](#)

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.

 **Your document was uploaded successfully and awaits your confirmation below.**

- No errors or warnings were found in the document.
- The uploaded data dictionary **contains 21 fields**, which will replace the 1 fields that currently exist in the project (excluding 'Form Status' fields, which are automatically generated by REDCap).

DISCLAIMER: It has been detected that you are using 'calc' field types in the Data Dictionary you just uploaded. We advise you please [read the disclaimer for 'calc' field types](#) before proceeding with committing your changes.

Are you ready to commit the changes to the project from the uploaded Data Dictionary?
 (Click the button below to submit the changes.)

- Once the user commits the changes, the system will provide a successful change notification.

[Project Setup](#)
[Online Designer](#)
[Data Dictionary](#)

 [VIDEO: How to use this page](#)

 **Changes Made Successfully!**

The field changes included in the uploaded Data Dictionary have been committed.

- Navigate to the *Online Designer* tab where the user can review the instruments created from the Data Dictionary upload. Please add or remove fields required for the project from within an instrument(s).

[Project Setup](#)
[Online Designer](#)
[Data Dictionary](#)

 [VIDEO: How to use this page](#)

The Online Designer will allow you to make project modifications to fields and data collection instruments very easily using only your web browser. NOTE: While in development status, all field changes will take effect immediately in real time.

Data Collection Instruments

Add new instrument:

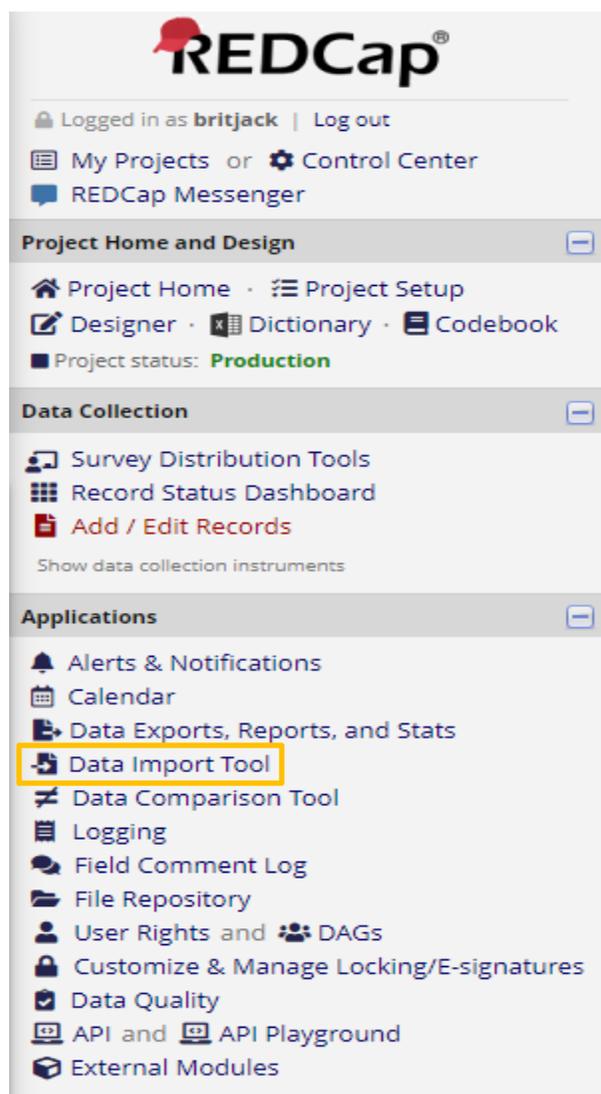
 a new instrument from scratch

 a new instrument from the REDCap Shared Library

Instrument name	Fields	View PDF	Instrument actions
Demographics	17		<input type="button" value="Rename"/> <input type="button" value="Delete"/>
Lab Results	4		<input type="button" value="Rename"/> <input type="button" value="Delete"/>

Step 6

- To upload the data into the external database, navigate to the *Data Import Tool* hyperlink on the left-hand side.



REDCap
 Logged in as **britjack** | [Log out](#)
[My Projects](#) or [Control Center](#)
[REDCap Messenger](#)

Project Home and Design

- [Project Home](#) · [Project Setup](#)
- [Designer](#) · [Dictionary](#) · [Codebook](#)
- Project status: **Production**

Data Collection

- [Survey Distribution Tools](#)
- [Record Status Dashboard](#)
- [Add / Edit Records](#)
- Show data collection instruments

Applications

- [Alerts & Notifications](#)
- [Calendar](#)
- [Data Exports, Reports, and Stats](#)
- [Data Import Tool](#)
- [Data Comparison Tool](#)
- [Logging](#)
- [Field Comment Log](#)
- [File Repository](#)
- [User Rights and DAGs](#)
- [Customize & Manage Locking/E-signatures](#)
- [Data Quality](#)
- [API and API Playground](#)
- [External Modules](#)

- Select *Choose File* to search for the data saved to your computer from Step 2. This step will import the data into the newly created external project.

NOTICE:

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

 **CSV import**

 **CDISC ODM (XML) import**

Instructions:

1.) 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)

2.) 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.

3.) Click the 'Browse' or 'Choose File' button below to select the file on your computer, and upload it by clicking the 'Upload File' button.

4.) 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.

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?

Name the imported records automatically (force record auto-numbering) ?

 **Upload your CSV file:**

No file chosen

- The system will prompt the user that the data was uploaded and ask that the user ensure they want to import the data. Follow the Instructions for *Data Review*. Click *Import Data* to confirm the import.

✔ **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	first_name	last_name	address	telephone	email	dob	age	ethnicity	race
1 (new record)	John	Doe	145 Turnaround Way, Winston Salem, NC 28546	(569) 821-5242	abc@def.com			1	4
2 (new record)	Mary	Moore	789 Johnson Way, Winston Salem, NC 85642	(336) 852-1452	abc@edf.com				1

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

[Import Data](#)

- The system will provide an import successful notification.

✔ **Import Successful!** 2 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.

- Confirm the data uploaded correctly to the newly created external project. The user can review the data by navigating to the *Add/Edit Records* hyperlink on the left-hand side of the page.

REDCap™

Logged in as [] | [Log out](#)

[My Projects](#)
[Project Home](#)
[Project Setup](#)

Project status: **Development**

Data Collection [Edit Instruments](#)

Record Status Dashboard
 - View data collection status of all records

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

Data Collection Instruments:
[Demographics](#)
[Lab Results](#)

Demographics

You may view an existing record/response by selecting it from one of the drop-down lists below. The records are separated into each drop-down list according to their status for this particular data collection instrument. To create a new record/response, type a new value in the text box below and hit Tab or Enter. To quickly find a record without using the drop-downs, the text box will auto-populate with existing record names as you begin to type in it, allowing you to select it.

Total records: 2

Incomplete Records (0)	-- select record --
Complete Records (2)	-- select record --
Enter a new or existing Study ID	<input type="text" value="1"/> <input type="text" value="2"/>

[Show Unverified Records above](#)

Data Search

Choose a field to search (excludes multiple choice fields)	-- select search field --
Search query Begin typing to search the project data, then click an item in the list to navigate to that record.	<input type="text"/>

Step 7

- Please complete the remainder of the project setup from the *Project Setup* tab.