

# Migration of REDCap Project from Old Server to New Server

## Brief Instructions

---

1. Login to Old Server (<https://redcap.unmc.edu/redcap/>).
  - a. Project Home > Download the current Data Dictionary
    - i. This first downloaded .CSV file contains your data instruments
  - b. Project Home > Export Data
  - c. Simple Data Export > Export all data now
  - d. Click the “Raw Excel CSV” format icon
    - i. This second downloaded .CSV file contains your survey data
2. Login to the new, externally-accessible server (<https://unmcredcap.unmc.edu/redcap/>)
  - a. Create New Project using an empty project (blank slate)
  - b. Project Setup > Upload Data Dictionary > Browse
    - i. At the prompt, locate the first CSV file you made with the data collection instruments
    - ii. Upload File
    - iii. Commit Changes
  - c. Sidebar Menu > Data Import Tool > Browse
    - i. At the prompt, locate the second CSV file you made with your survey data
    - ii. Upload File
    - iii. Import Data
3. Done!

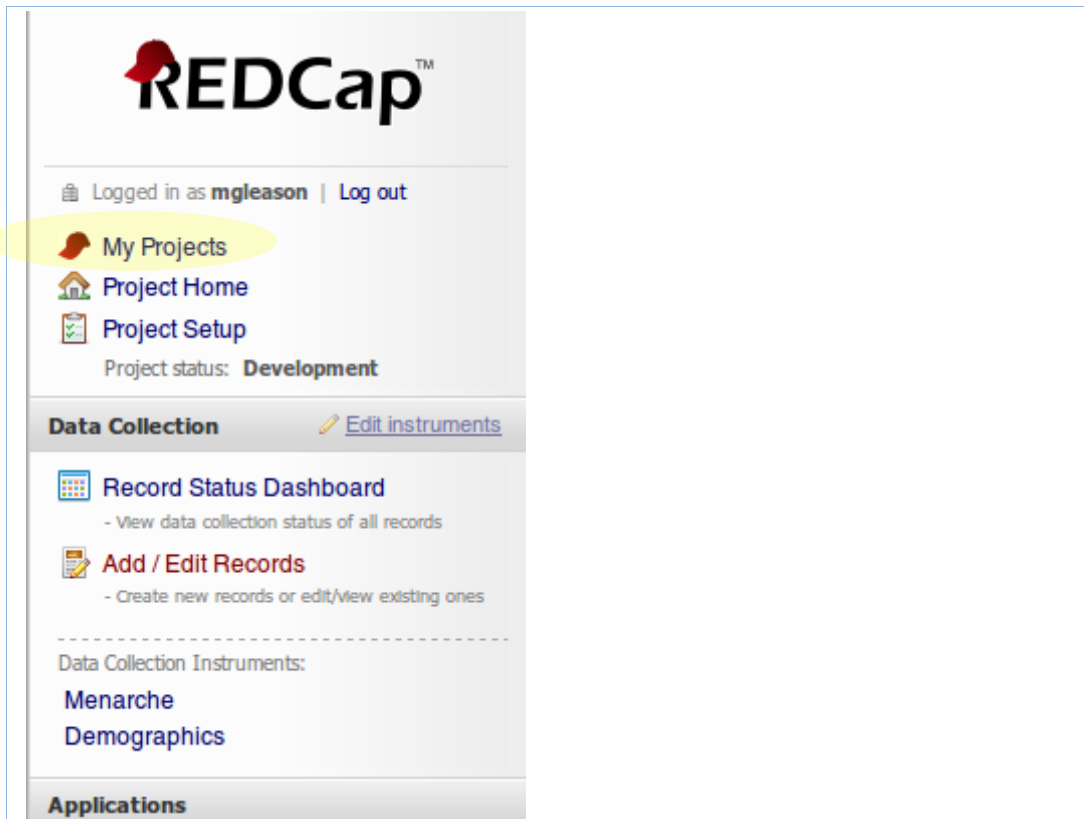
## Detailed Instructions

---

To enable access to your existing RedCAP survey to users outside the campus network, we will actually need to copy your project to a different computer that is accessible to the public internet (which we will refer to as the *New Server*). To do this, we will *migrate* your project's configuration and data to the new computer, and the first step is to *export* these data from the old server to your desktop computer.

These instructions will demonstrate how to do this using a project called “Menarche,” which has two data collection instruments. Your project will have a different name and may only have one instrument, but the overall process will be the same.

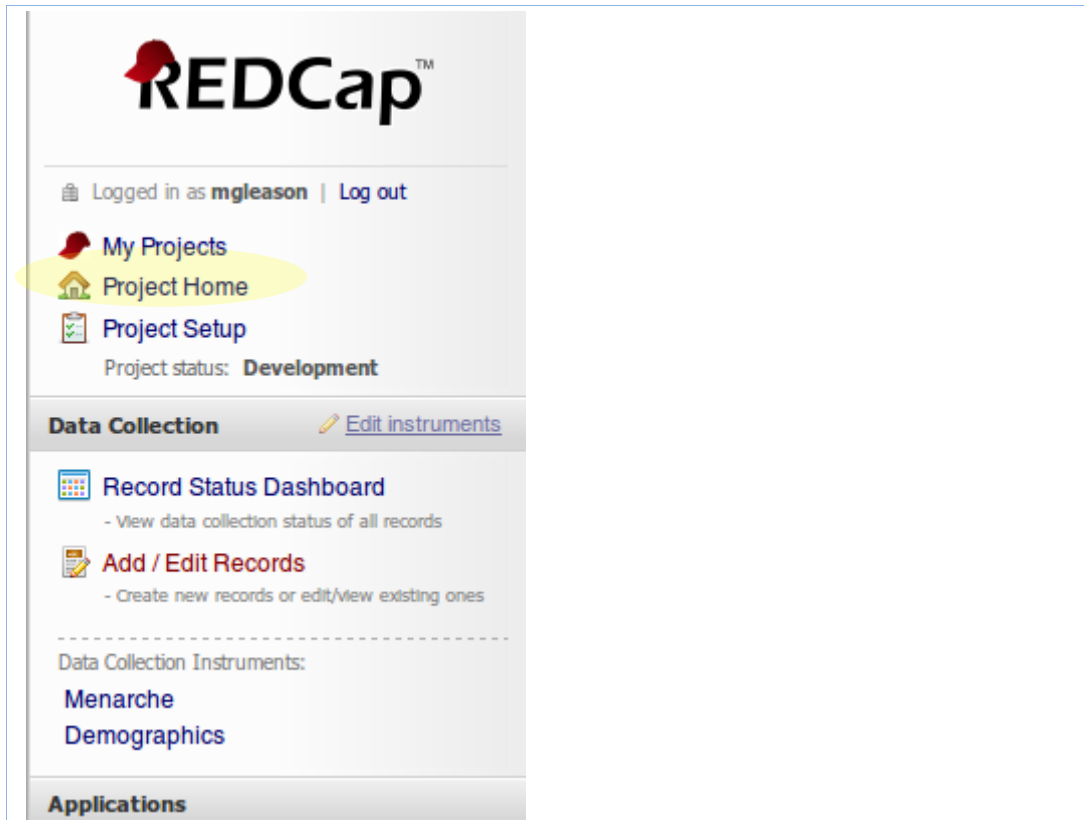
Login to the old server's RedCAP page at <https://redcap.unmc.edu/redcap/>. Click the “**My Projects**” link (shown highlighted in yellow, below) on the navigation bar on the left side of the screen, to bring up your list of projects (if it wasn't shown already).



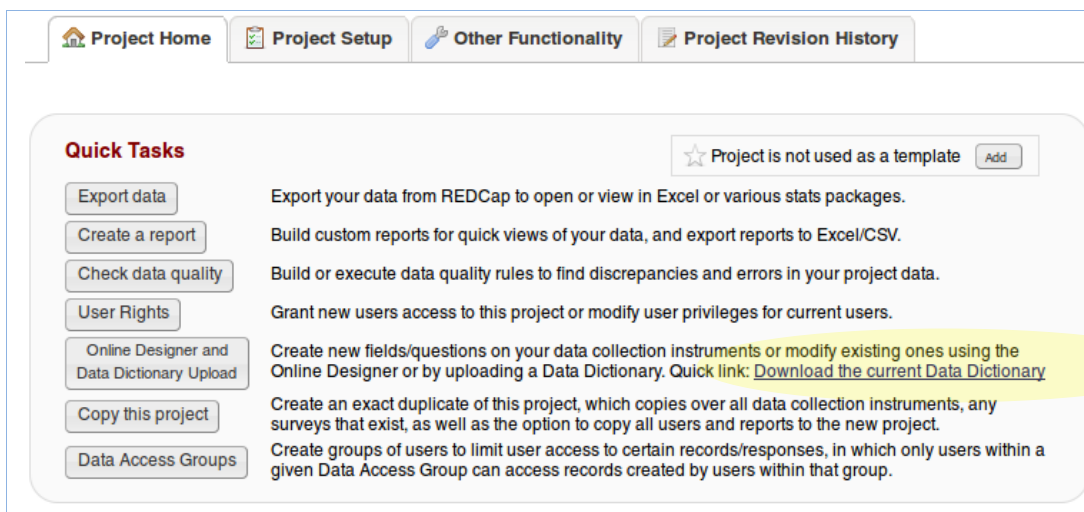
Go to the project you want to migrate by clicking it under My Projects. In this example, we click “Menarche.”



Go to “**Project Home**” by clicking the link on the navigation bar.



Now you are ready to export your data collection instruments. Do that by clicking the link labeled “**Download the current Data Dictionary**” from the Project Home screen. Upon clicking the link, you should be prompted to download the Data Dictionary in “CSV” format (a text file that uses commas as separators). Save this file to your computer, which we will refer to as the *Data Dictionary CSV File*. This file contains configuration information for all your instruments, so you only need to do this once per project.



Next, export your survey’s data. Start this process by clicking the “**Export Data**” button from the Project

Home screen.

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

**Quick Tasks**

☆ Project is not used as a template **Add**

- Export data** Export your data from REDCap to open or view in Excel or various stats packages.
- Create a report** Build custom reports for quick views of your data, and export reports to Excel/CSV.
- Check data quality** Build or execute data quality rules to find discrepancies and errors in your project data.
- User Rights** Grant new users access to this project or modify user privileges for current users.
- Online Designer and Data Dictionary Upload** Create new fields/questions on your data collection instruments or modify existing ones using the Online Designer or by uploading a Data Dictionary. Quick link: [Download the current Data Dictionary](#)
- Copy this project** Create an exact duplicate of this project, which copies over all data collection instruments, any surveys that exist, as well as the option to copy all users and reports to the new project.
- Data Access Groups** Create groups of users to limit user access to certain records/responses, in which only users within a given Data Access Group can access records created by users within that group.

You should now be at the Data Export Tool screen. Click the “**Export all data now**” button underneath the “Simple Data Export (one-click)” heading.

**Data Export Tool**

**REDCap allows you to easily export your project data to Microsoft Excel, SAS, Stata, R, or SPSS for analysis.** Exporting your data out of REDCap is as simple as you want it to be. To get a quick data dump of all records for your project, choose the Simple Export one-click option. However, if you prefer more granular control over the data you are exporting, you may choose the Advanced Export option. Whenever you perform a data export, REDCap will automatically place a back-up copy of all exported files in the File Repository, if you wish to view it later.

★ Before exporting your data, you may want to first consider using the [Data Quality module](#) to check for any errors or discrepancies in your data before you begin data analysis.

**Simple Data Export (one-click)**

To perform a quick data dump of your entire data set, simply click the button below. When done, it will provide you with various format options for downloading your data.

**Export all data now**

— OR —

**Advanced Data Export**

This option provides a variety of choices for customizing what data gets exported. You may select individual fields one at a time or entire data collection instruments to export. You may also utilize the data de-identification options (if your user privileges permit) that allow you to limit the amount of sensitive information that you are exporting, if you wish.

**Display advanced options**

**Other export options**

**PDF (includes data for all records)**  
The data for all records in this project may be downloaded in a single PDF file. This file contains the actual

**PDF**

REDCap will now ask what format you want the data in. Click the “**Raw Excel CSV**” format icon. Be sure **not** to select the Excel CSV Labels format. Upon clicking the icon, you should be prompted to save another CSV file, which we will refer to as the *Raw Data CSV File*. Save this file to your computer.

**Data Export Tool**

Your files have been created and automatically saved within the File Repository section of this project. You may click the icons below to retrieve the files necessary for importing data into your preferred data viewing or analysis package. After clicking the icon(s) on the right, choose SAVE and specify the desired location on your computer when prompted in order to download each file to your computer. Remember that the files may contain confidential information and should thus be protected.

**RETURN TO PREVIOUS PAGE**

		Download Syntax & Data
<b>Microsoft Excel</b> You may download the survey results in CSV (comma-separated) format, which can be opened in Excel. You have the choice of downloading the data either with the full headers and answer labels or just with the answer codes (i.e. raw data).  <i>NOTE: If you are using a version of Microsoft Excel prior to Excel 2007, due to limitations the data will only be read to 255 columns when opened.</i>	<div> <b>EXCEL CSV</b>            Labels         </div> <div> <b>EXCEL CSV</b>            Raw         </div> <div> <a href="#">Send file?</a> </div>	
<b>SPSS Statistical Analysis Software</b> Instructions: Download and save all 3 files on the right to a common location. First, double-click on the Pathway Mapper (.bat) file, which will run quickly and	<div> <b>SPSS</b> </div> <div> <b>DATA CSV</b> </div>	

The following steps will now take place on the externally-accessible New Server. Login to it at <https://unmcrcdcap.unmc.edu/redcap/>.

Note that your username and password are likely to be different. On the New Server, your username and password are the same as what you use for other UNMC services, such as email. Omit any domain information, for example, if you login to email with “UNMC\_DOMAIN\joeuser”, you would use just “joeuser” as your username on the New Server.

Upon logging in to the New Server for the first time, you won’t have any projects. Click the “**Create New Project**” tab from the main screen.

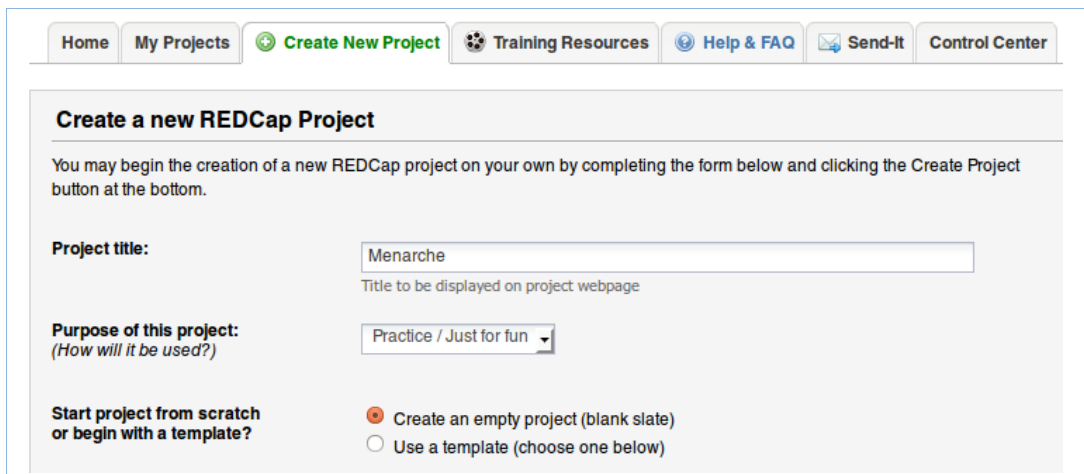
Home

My Projects

**Create New Project**

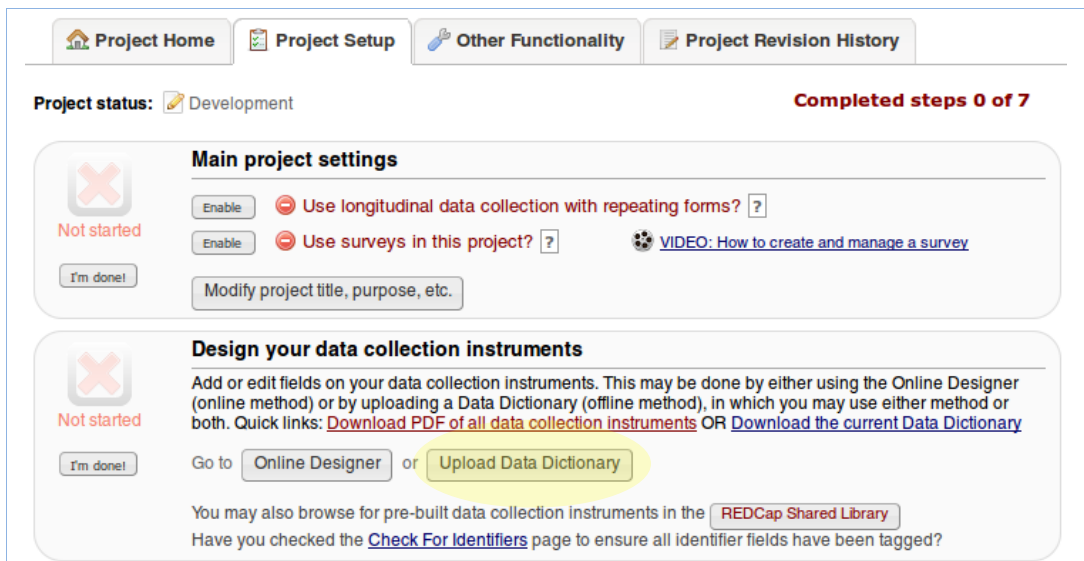
Training

You should be familiar with project creation, unless someone else created the original project on the Old Server. Type in your project's title, select a relevant purpose, and make sure “**Create an empty project (blank slate)**” is selected. Click the “**Create Project**” button to continue.



The screenshot shows the 'Create a new REDCap Project' form. At the top is a navigation bar with links: Home, My Projects, **Create New Project** (highlighted with a green plus icon), Training Resources, Help & FAQ, Send-It, and Control Center. The main heading is 'Create a new REDCap Project'. Below it, a paragraph states: '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.' The form contains three sections: 1. 'Project title:' with a text input field containing 'Menarche' and a note 'Title to be displayed on project webpage'. 2. 'Purpose of this project: (How will it be used?)' with a dropdown menu showing 'Practice / Just for fun'. 3. 'Start project from scratch or begin with a template?' with two radio buttons: 'Create an empty project (blank slate)' (selected with a red dot) and 'Use a template (choose one below)'.


Creating the project should bring you to the Project Setup tab. Click the “**Upload Data Dictionary**” button under the “**Design your data collection instruments**” heading.



The screenshot shows the 'Project Setup' tab. The top navigation bar has four tabs: Project Home, **Project Setup** (active), Other Functionality, and Project Revision History. Below the tabs, the 'Project status' is 'Development' with a pencil icon, and 'Completed steps 0 of 7' is shown in red. The main content area is divided into two sections: 1. 'Main project settings' with a 'Not started' status (red X icon). It includes two 'Enable' buttons, each followed by a red circle with a minus sign and a question mark: 'Use longitudinal data collection with repeating forms?' and 'Use surveys in this project?'. There is also a link 'VIDEO: How to create and manage a survey' and a button 'Modify project title, purpose, etc.'. 2. 'Design your data collection instruments' with a 'Not started' status (red X icon). It includes a paragraph about adding or editing fields, followed by quick links: 'Download PDF of all data collection instruments' and 'Download the current Data Dictionary'. Below this, there are two buttons: 'Go to Online Designer' and 'Upload Data Dictionary' (highlighted with a yellow circle). At the bottom, there is a link 'Check For Identifiers' and a button 'REDCap Shared Library'.

REDCap will now ask for your data collection instruments. Ignore the “Steps for making project changes” and instead just click the “**Browse...**” button.

**Steps for making project changes:**

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

No file selected.

At this point you'll be prompted for your Data Dictionary CSV File. Locate this file on your computer and click “Open” (or whatever button needed to dismiss the dialog box).

Back in the REDCap window, click the “**Upload File**” button to send the Data Dictionary CSV File to the New Server.

After a brief delay, REDCap should return saying that the upload was successful (the screenshot below will vary slightly depending on the complexity of your project).

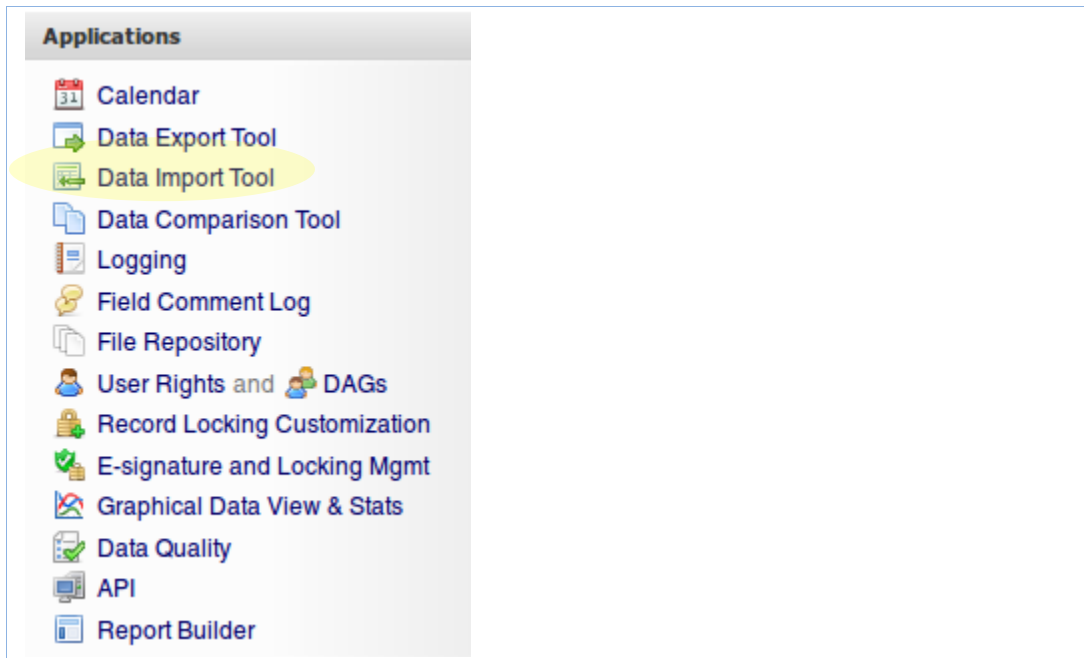
Click the “**Commit Changes**” only if there were no errors reported (if errors occur, let us know; there shouldn't be any because the REDCap on the Old Server make the file for you).

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

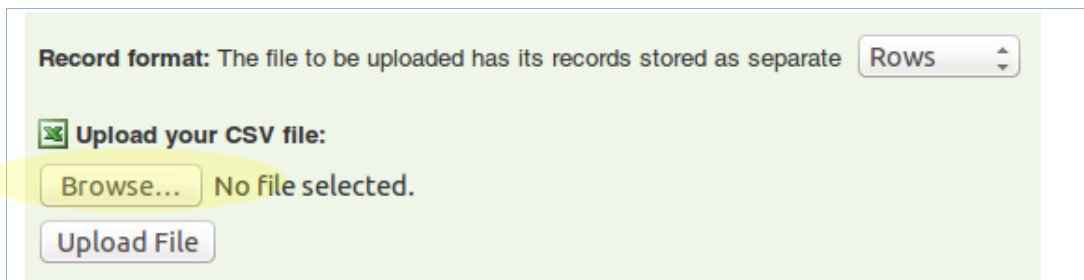
- No errors or warnings were found in the document.
- The uploaded data dictionary **contains 4 fields**, which will replace the 1 fields that currently exist in the project (excluding 'Form Status' fields, which are automatically generated by REDCap).

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

Your project now has its data collection instruments. The next step is to add the survey data that you gathered from the Old Server. Start this process by clicking on the “**Data Import Tool**” link in the sidebar.



On the Data Import Tool screen, go to the bottom and click the “**Browse...**” button.





You will now be asked to locate your Raw Data CSV File.

✔ **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	race	age_at_menarche	menarche_complete	year_birht	demographics_complete
<b>1</b> (new record)	<b>1</b>	<b>12</b>	<b>2</b>	<b>1984</b>	<b>2</b>

Click the “**Import Data**” button to add the uploaded data to the project.

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

**Import Data**

Your project has now been migrated to the New Server! Be sure to now use the new URL for your project, which should be prefixed with <https://unmcredcap.unmc.edu>. You actually have two live copies of your project, one on each server. You may wish to delete the project on the Old Server to prevent confusion.

It is advised that you keep a backup of your project on your computer, so that you can restore the project in the event of a catastrophe. You simply need to keep the CSV files you made here.