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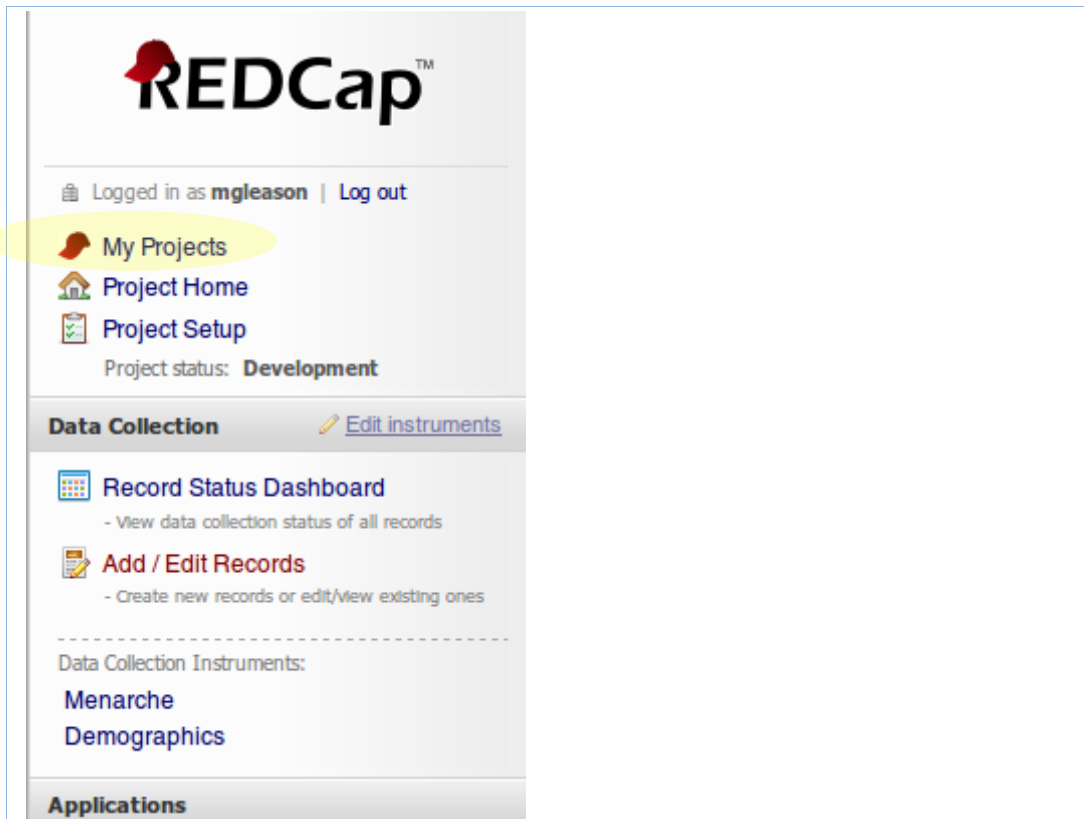
Go to the project you want to migrate by clicking it under My Projects. In this example, we click "Menarche."

Go to "**Project Home**" by clicking the link on the navigation bar.
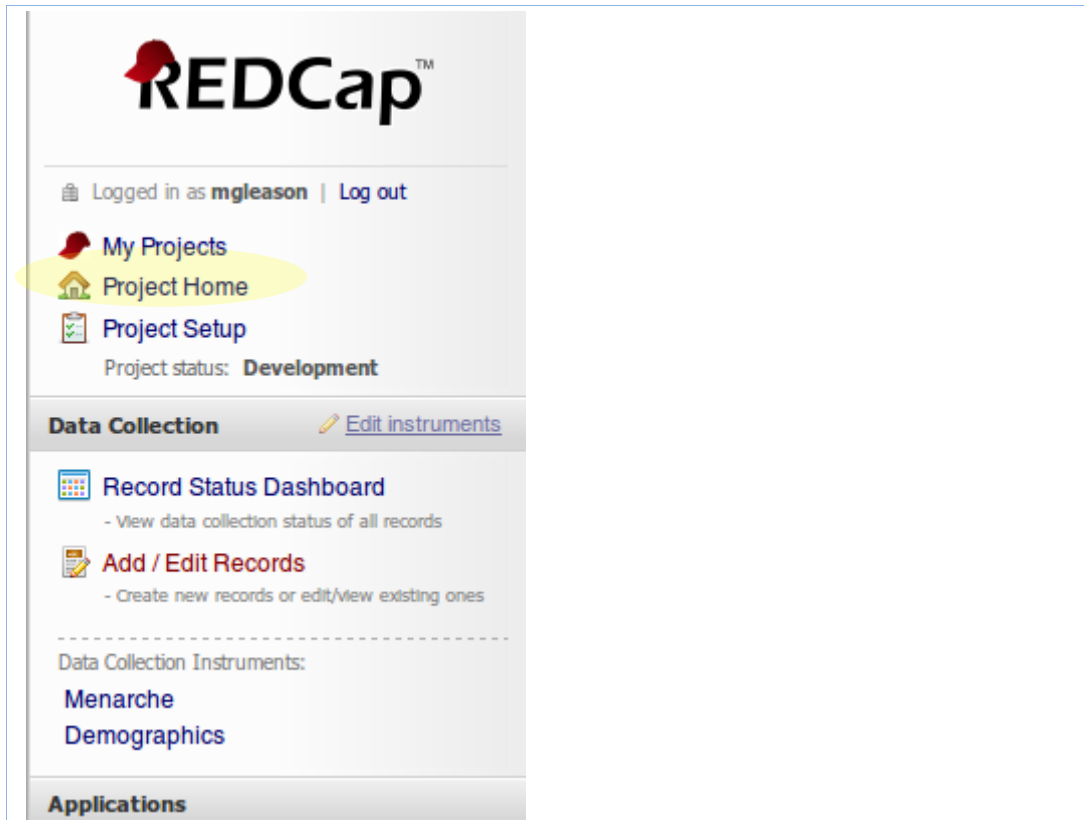
Now you are ready to export your data collection instruments. Do that by clicking the link labeled "**Download the current Data Dictionary**" from the Project Home screen. Upon clicking the link, you should be prompted to download the Data Dictionary in "CSV" format (a text file that uses commas as separators). 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.
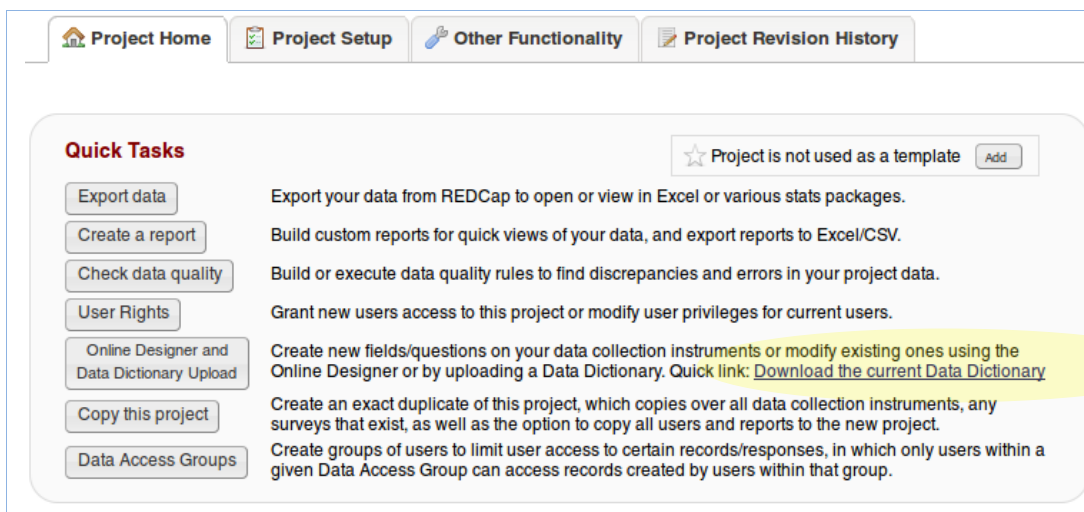
Next, export your survey's data. Start this process by clicking the "**Export Data**" button from the Project

Home screen.

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.

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.

The following steps will now take place on the externally-accessible New Server. Login to it at https://unmcredcap.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.
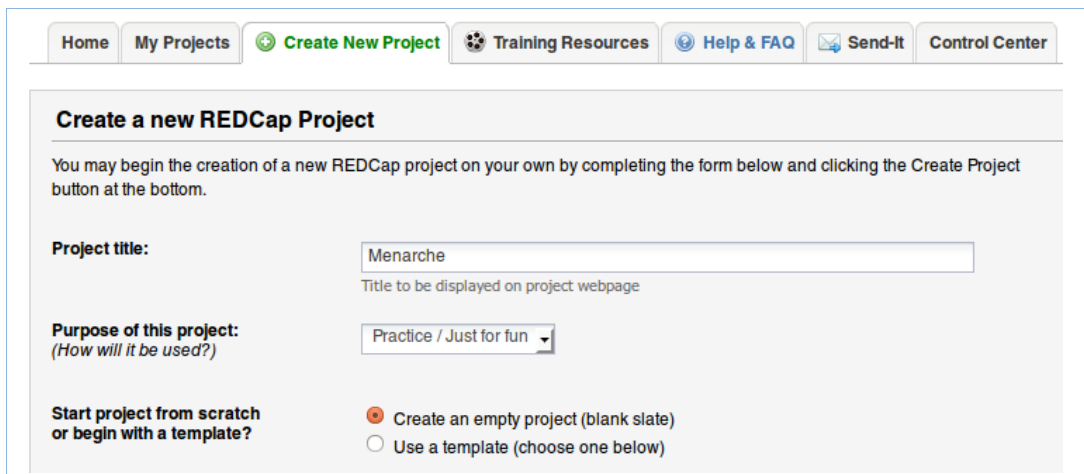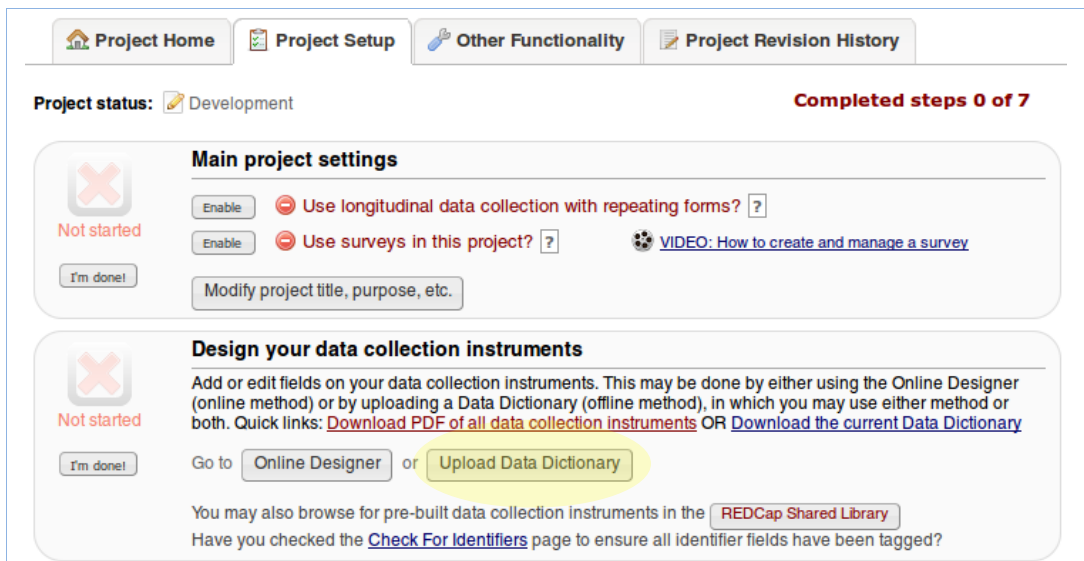
You should be familiar with project creation, unless someone else created the original project on the Old Server. Type in your project's title, select a relevant purpose, and make sure "**Create an empty project (blank slate)**" is selected. Click the "**Create Project**" button to continue.

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.

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

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 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.
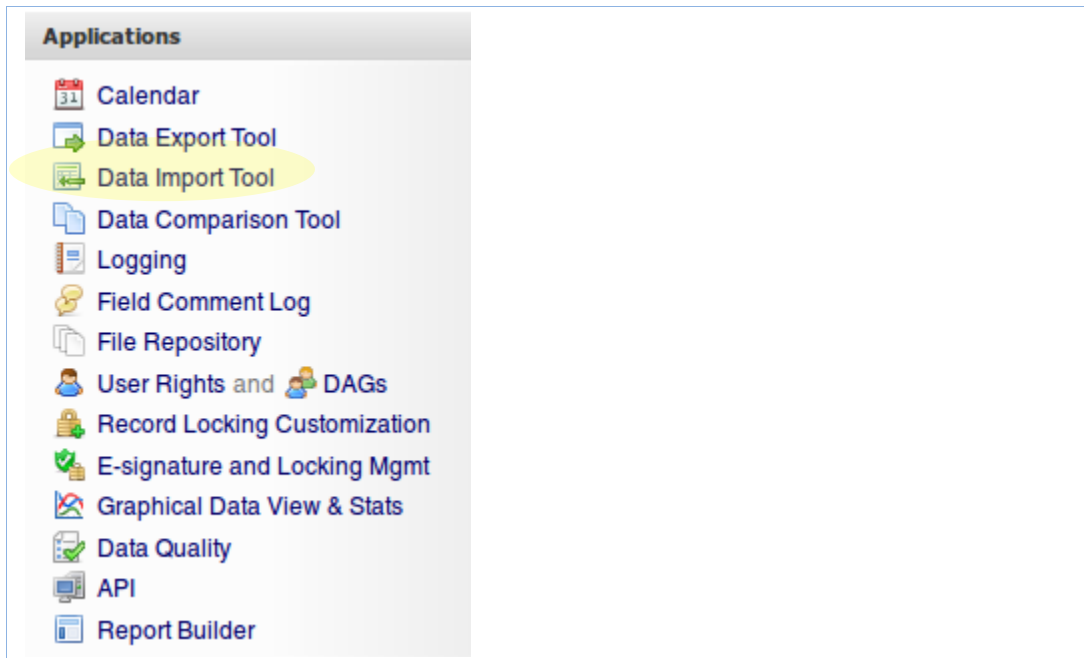
On the Data Import Tool screen, go to the bottom and click the "**Browse…**" button.
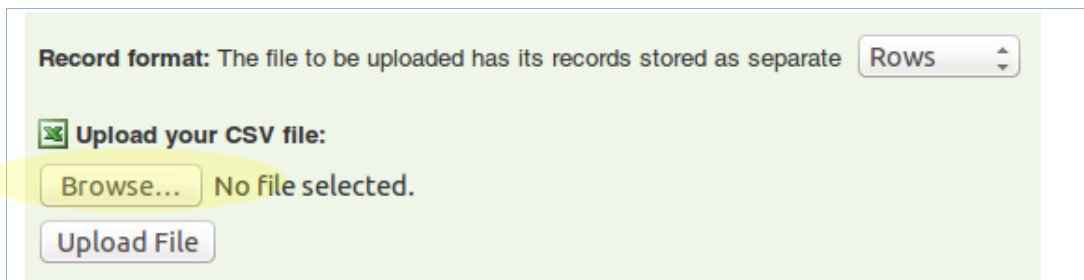
You will now be asked to locate your Raw Data CSV File.

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

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.