



Migrating REDCap Project

DIY Guide for Users

OARC-REDCap Team

Version: [1.3]

Please read this entire document before you
start migrating your project.

For help contact your REDCap administrator via email
at:

redcap-help@oarc.rutgers.edu

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HOW TO TRANSFER A REDCAP PROJECT FROM ONE INSTANCE TO ANOTHER

Purpose

This guide outlines a general process to transfer a REDCap project from one REDCap instance (REDCap Instance **S**) i.e. “**Source**” to another (REDCap Instance **T**) i.e. “**Target**”, including both metadata and data, while following institutional security protocols.

***Please read this entire document before project migration. If you have any question, contact us**

redcap-help@oarc.rutgers.edu.

Definitions

REDCap Instance: A separate REDCap system hosted on its own server, with a unique URL and typically managed by a different institution / entity inside an institute.

Source REDCap Instance (S): The original REDCap instance (Source instance) where the project currently exists.

Target REDCap Instance (T): The new REDCap instance (Target instance) to which the project is being transferred.

Pre-migration Checklist

Ensure the user (who is performing migration) of REDCap Instance **S** has the following rights:

- ✓ Project Design and Setup
- ✓ Data Access Groups (if applicable) - **If you use DAG (Data Access Group) in your project please contact us before you migrate your project to the new server**
- ✓ Full Data Export (including identifiers)
- ✓ Logging
- ✓ File Repository
- ✓ Randomization Setup and Dashboard (if applicable)

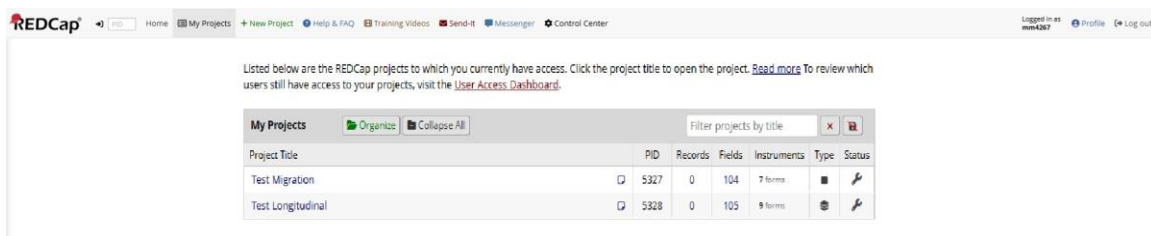
Ensure that the file downloaded is stored securely, especially if it contains PHI/PII. Coordinate with IT or use institutional secure storage.

***It is important to note that after migration, the public survey link will be updated. Any advertisements or recruitment materials will need to be updated with the new link. The survey timestamps cannot be imported; however, they can be stored in a CSV data file. Also, locked records do not stay locked after migration.**

Step-by-Step Migration Instructions

STEP 1: SELECT THE PROJECT/S TO TRANSFER

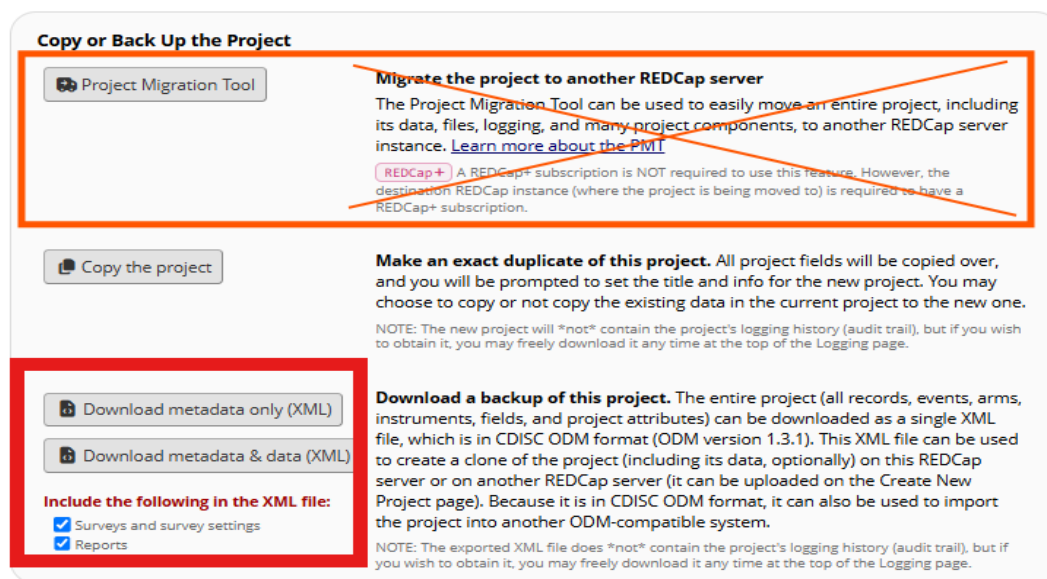
- Log into REDCap Instance S.
- Navigate to “My Projects”.
- Identify a project to transfer.
- Create a folder on your local or shared drive for the project.



STEP 2: DOWNLOAD PROJECT AND DATA FROM REDCAP INSTANCE S

*** The Project Migration Tool is currently unavailable for project migrations.**

- DOWNLOAD PROJECT XML
 1. Go to the project's **Project Home**.
 2. Select **Other Functionality** tab.
 3. Scroll to **Copy or Back Up the Project** section. You can pick the features you want to transfer from a list provided under “Include the following in the XML file:” heading. This list can be different for each project depending on the features being implemented. These features can be selected or deselected using the checkboxes as shown below.



4. There are two options to download a project, choose one as per the following guideline:

- a. **Option A:** Download metadata only (XML) – Better option for larger projects. If you are not sure, then you can use this option. This will be a two-step process; you will separately download the metadata and then the data.
- b. **Option B:** Download metadata & data (XML) – Best option for smaller projects where very little data has been collected.

***Please note: if a project has 'Alerts' or 'Automated Survey Invitations', leave the 'Leave Alerts enabled' UNCHECKED when migrating. If not left unchecked, participants will be re-notified upon import of the data.**

◆ **OPTION A (LARGE PROJECT 2-STEP PROCESS) - DOWNLOAD METADATA ONLY (XML)**

Now that you have the metadata (XML) for the project, proceed to download the data.

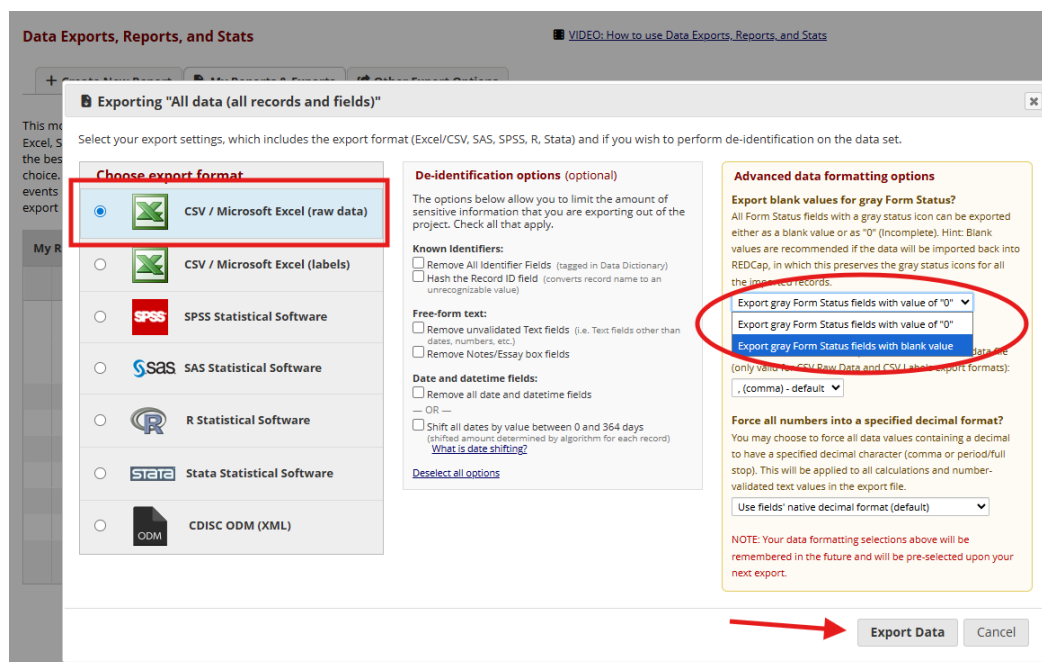
1. In the left-hand menu-window go to the **Applications** section.
2. Click on **Data Exports, Reports, and Stats**.



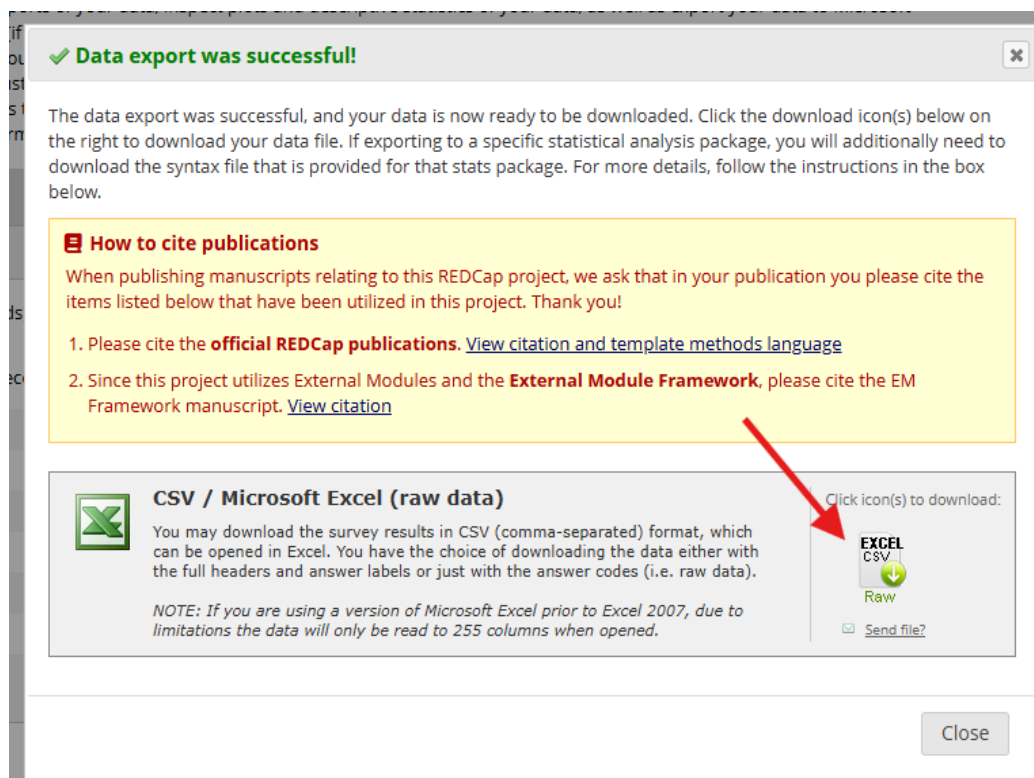
3. From the **My Reports & Exports** table, click on **Export Data** button in front of All data (all records and fields).

My Reports & Exports		
	Report name	View/Export Options
A	All data (all records and fields)	View Report Export Data Stats & Charts

4. Choose **CSV / Microsoft Excel (raw data)** option to download the data and choose **"Export From Status fields with blank value"** in the **Advanced data formatting options** section as shown below.



5. Click **Export Data** button on the right end of the popup window shown above.
6. Click on the **"Excel CSV"** icon to download the data file as shown below.



◆ OPTION B (SMALL PROJECT 1-STEP PROCESS) - DOWNLOAD METADATA & DATA (XML)

1. A new window (as shown below) will pop up, and this offers various options to transfer a project according to specific requirements.

Exporting "Entire project (metadata & data)"

Export Entire Project (metadata & data)

REDCap Project (XML)

The entire project (all records, instruments, fields, and project attributes) can be downloaded as a single XML file (CDISC ODM format).

This XML file can be used to create a clone of the project (including its data, optionally) on this REDCap server or on another REDCap server (it can be uploaded on the Create New Project page). Because it is in CDISC ODM format, it can also be used to import the project into another ODM-compatible system.

☐ **Include all uploaded files and signatures?**
Include all files uploaded for File Upload and Signature fields in the XML file? NOTE: This can make the export very large and may prevent it from completing if the project contains many files or very large files.

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 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](#)

Additional export options

☒ Export survey identifier field and survey timestamp field(s)?

Advanced data formatting options

Export blank values for gray Form Status?

All Form Status fields with a gray status icon can be exported either as a blank value or as "0" (incomplete). Hint: Blank values are recommended if the data will be imported back into REDCap, in which this preserves the gray status icons for all the imported records.

Export gray Form Status fields with blank value ▼

Set CSV delimiter character

Set the delimiter used to separate values in the CSV data file (only valid for CSV Raw Data and CSV Labels export formats):

., (comma) - default ▼

Force all numbers into a specified decimal format?

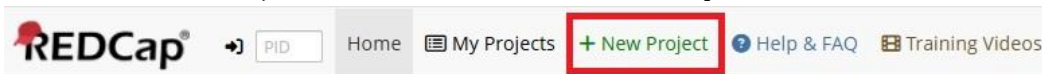
You may choose to force all data values containing a decimal to have a specified decimal character (comma or period/full

Export Entire Project (metadata & data) **Cancel**

2. Select the option **Include all uploaded files and signatures?** with great CAUTION. If you have a project that stores a substantial number and /or size of files collected, then this will make the export file very large which might fail the export or import process. In this case, it is suggested to use **Option A** and download data and "uploaded files" separately (Instructions for this process are included in this document)
3. In the second column, leave the de-identification options unchecked.
4. Leave the survey identified field and survey timestamp field(s) checked. (The survey timestamp data will NOT be imported. The csv data file can have this information and can be kept with your migrated project if you need this information)

STEP 3: CREATE NEW PROJECT ON REDCAP INSTANCE T

1. Log in to target REDCap Instance T.
2. Select the **+New Project** button from the menu at the top.



3. On the new screen, fill in Project Title, Project Purpose, and any additional details for the project in Project notes.
4. Select Upload a REDCap project XML file (CDISC ODM format).
5. Click Choose File and select the saved XML file located on your computer from Instance S.

6. Click **Create Project** button at the end of the form.

+ Create a new REDCap Project

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.

Project title:

Project's purpose: How will it be used?

Project notes (optional): Description of the project's use or purpose (displayed on the My Projects page)

Project creation option:

- ☐ Empty project (blank slate)
- ☒ Upload a REDCap project XML file (CDISC ODM format) ?
 - Select XML file: No file chosen
- ☐ Use a template (choose one below)

★ Choose a project template

select template	Template title (sorted by title)	Template description
☐	Classic Database	Example of the Field Embedding feature.
☐	MyCap Example Project	Various examples of MyCap tasks and active tasks for collecting data from participants using the MyCap app on a mobile device.
☐	Project Dashboards, Smart Functions, Smart Tables, & Smart Charts	Example of Project Dashboards, Smart Functions, Smart Tables, & Smart Charts with fifty records included.



Check the project in the designer mode and go through all the instruments to validate the structure that is created correctly. If you are satisfied, then we are ready to move the data into this project.

◆ REQUEST TO CHANGE THE STATUS OF PROJECT TO PRODUCTION

This is an important step to perform right after creating your project if you have more than 20 records in your project that you are migrating. **You can skip this for later if your project is in the testing stage with less than 20 records.** The change of status of a project from development to Production needs REDCap administrator approval. To request this change follow the following steps:

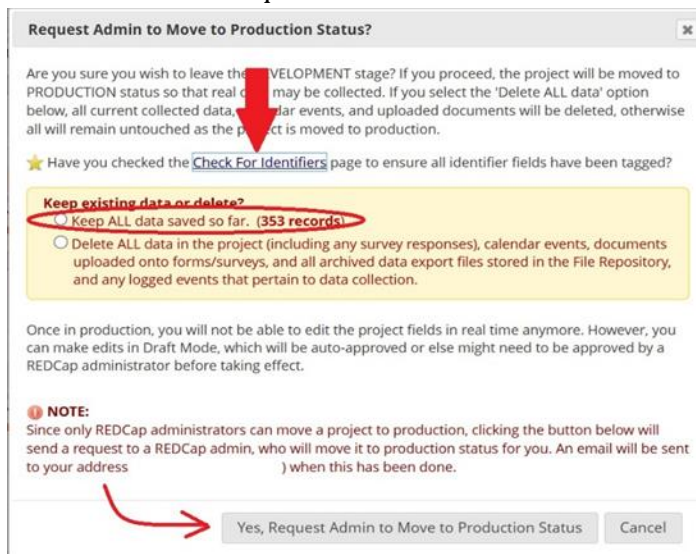
1. Go to the home of the project just created and you will see that the status of your project will be **“Development”** as shown in the left menu bar in the **“Project home and Design”** section as shown in the figure below.



2. Click on the “**Project Setup**” tab and scroll down to the “Move your project to production status” section. Click “**Move project to production**” button as shown below.



3. The following popup window will appear as shown below. Please click on the “**Check For Identifier**” to check the list of identifiers you want to define out of all the variables in the project. If you are moving a project with your records that you want to keep, then you should choose the first “**Keep All data saved so far**” option. If there is no record (most of the time in a migrated project just created) then it does not matter what you choose. Click on “**Yes, Request Admin to Move to Production Status**” button. A request will be sent to the Admins of the REDCap to review.



4. REDCap Admins usually process the request within a few hours. Please allow **24 working hours** (Holidays and Weekends are excluded) to the REDCap staff to process the request.

◆ **IMPORT DATA DOWNLOADED SEPARATELY AS CSV FILE**

1. In the left-hand menu **Applications** section, click **Data Import Tool**.
2. On the new screen, read the instructions carefully and upload the previously saved CSV-data file by clicking on the **Choose File** button using the **CSV import** tab as shown below:

Migration Project Basic 1 PID 4471

Data Import Tool

This module may be used for importing data into this project from a CSV file or alternatively from an XML file in CDISC ODM format. Below are the steps you will need to follow in order to import your data successfully into this project.

CSV import **CDISC ODM (XML) import** **View background imports**

Instructions:

- 1.) You may import a modified version of a CSV data export file, or you can obtain a blank CSV data import template that you can save locally and add data that you wish to import. [Download your Data Import Template](#). Also download with other delimiters: [Semicolon \(;\)](#), [Tab](#) (with records in row format), or alternatively download the template with records in [column format](#). Also download with other delimiters: [Semicolon \(;\)](#), [Tab](#).
- 2.) Add data to the file, and save it. Be sure the Variables/Field Names are not changed or an error may occur. All multiple choice fields (e.g., dropdown, radio) must have the raw coded value (rather than the choice label) entered in those cells, or else it cannot be processed. These coded values can be found in the [Codebook](#).
- 3.) Choose your upload settings below, and select the data file located on your device. Then click the 'Upload File' button to begin the upload process. The data file will be checked for errors to ensure that all the data is in the correct format before it is fully imported into the project. By default, the data will be imported in real time; however, you may choose to import the data using a background process in which you will be notified via email once your data has been successfully imported.

Choose an import option Import in real time ?

Select your CSV data file Choose File No file chosen

Display the data comparison table? Yes, display uploaded data prior to importing ?

Auto-number/overwrite record IDs? No, use the record name provided ?

Overwrite data with blank values? No, ignore blank values in the file ?

File format settings

CSV delimiter of data file: Comma (,)

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

Records in file are formatted as: Rows

Upload File

3. Click **Upload File** button at the bottom of this form.
4. A review data screen will appear showing all the data in the CSV file. Review your data and click the **Import Data** button placed down at the end of the screen.
5. It may take some time depending on the size of the data. A message showing the result of the data-import will appear. (**Do not navigate to another page until the process is complete**)
6. In case the upload fails, it is possible that the data file is too big to upload. In this case, try using **"Import as background Process"** option in the **Data Import Tool** as shown below

Instructions:

- 1.) You may import a modified version of a CSV data export file, or you can obtain a blank CSV data import template that you can save locally and add data that you wish to import. [Download your Data Import Template](#). Also download with other delimiters: [Semicolon \(;\)](#), [Tab](#) (with records in row format), or alternatively download the template with records in [column format](#). Also download with other delimiters: [Semicolon \(;\)](#), [Tab](#).
- 2.) Add data to the file, and save it. Be sure the Variables/Field Names are not changed or an error may occur. All multiple choice fields (e.g., dropdown, radio) must have the raw coded value (rather than the choice label) entered in those cells, or else it cannot be processed. These coded values can be found in the [Codebook](#).
- 3.) Choose your upload settings below, and select the data file located on your device. Then click the 'Upload File' button to begin the upload process. The data file will be checked for errors to ensure that all the data is in the correct format before it is fully imported into the project. By default, the data will be imported in real time; however, you may choose to import the data using a background process in which you will be notified via email once your data has been successfully imported.

How to assign records to Data Access Groups:
 Since this project has Data Access Groups and since you are not in a group, you are able to assign or re-assign records to groups. You may assign records to groups by utilizing the 'redcap_data_access_group' field in your data import file, in which you will provide a **unique group name** for each record. A list of all the unique names for each Data Access Group are listed on the [Data Access Groups](#) page.

Choose an import option Import as background process (better for large data sets) ?

Select your CSV data file Choose File ProjectDash...-16_1043.csv

Display the data comparison table? Yes, display uploaded data prior to importing ?

Auto-number/overwrite record IDs? No, use the record name provided ?

Overwrite data with blank values? No, ignore blank values in the file ?

File format settings

CSV delimiter of data file: Comma (,) ?

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

Records in file are formatted as Rows ?

Upload File

Confirm the data file is the correct file

Before you can import the CSV data file using a background process, you must first confirm that the file is truly the intended file. Displayed below are the file name, file size, and the first two lines of the file. If this is the correct file, click Confirm. If not, then choose another file to upload.

File name: ProjectDashboard_DATA_2026-02-16_1043.csv
 File size: 1.3 KB

First two lines (or more) of the file:

```
study_id,redcap_data_access_group,age,ethnicity,race,gender,height,wei...
101,,30,H,A,F,198,75,2
102,,27,H,B,H,168,182,2
103,vanderbilt,102,H,A...
```

Confirm **Cancel**

7. After choosing this option and selecting the data file and confirming the file, the following screen will be shown to monitor the process of the background process.

CSV import CDISC ODM (XML) import View background imports

Show 25 entries Search Refresh table

Status	Upload Time	Completion Time	Original Filename	Uploader	Records Provided	Records Imported	Total Import Time (minutes)	Errors
Queued	02/16/2026 11:03am		ProjectDashboard_DATA_2026-02-16_1043.csv	mm4267_adm	50	0	< 1	0

Showing 1 to 1 of 1 entries Previous 1 Next

Halt import

8. If the upload fails again with the background upload option stated above, divide the data into multiple batches based on the number of records at the time of data export from source REDCap instance **S** OR divide the data into group of smaller number of instruments.

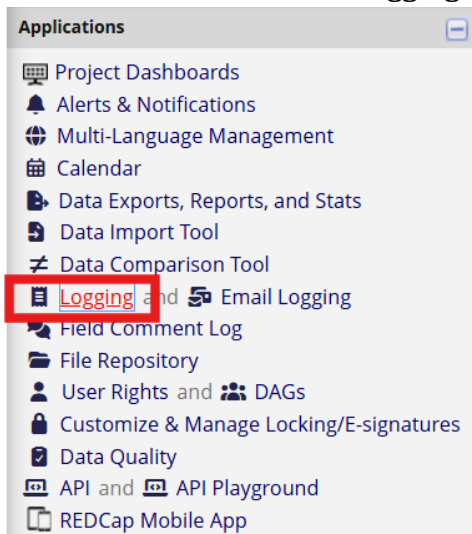
Additional (OPTIONAL) Steps: Transfer Additional Metadata

The XML file downloaded does not include everything for a project that may be useful / required for some users. The following are some of those metadata that you may want to save.

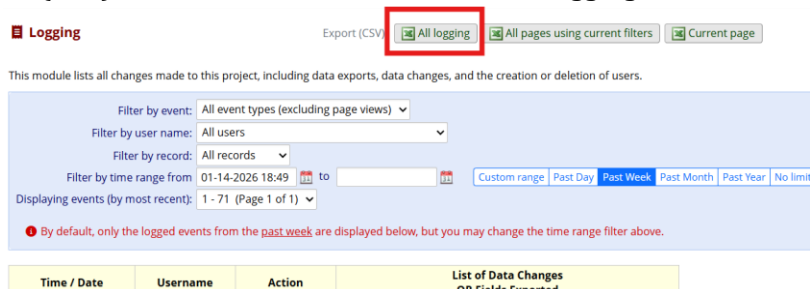
◆ LOGGING (RECOMMENDED)

The XML file downloaded (in the 2nd step) does not include logging activity data. In your new REDCap instance, there will be different logging information. If you want to keep the logging information from your previous instance, you can download that as a CSV file and upload it to the repository in the target instance.

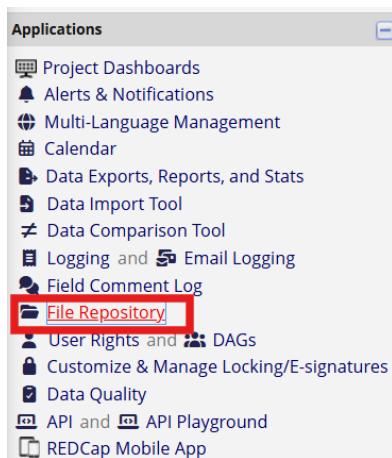
1. From instance **S**, click on **Logging** from the **Applications** menu.



2. Click **All Logging** button from the top of the next screen as shown in the **Export (CSV)** section below to download all the logging data.



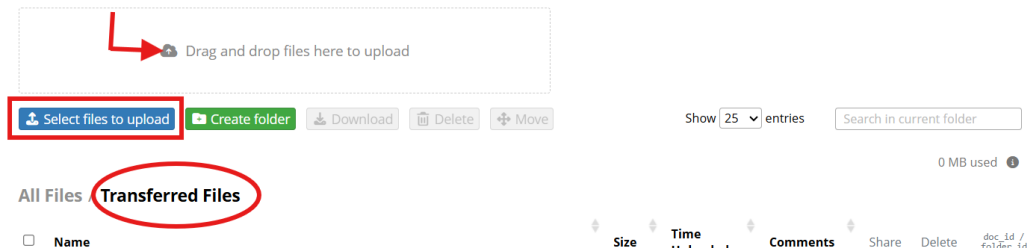
3. In instance **T**, go to your new project and click **File Repository** from the **Applications** menu.



4. Create a new folder named **“Transferred Files”** / any desired name (Best Practice)
5. Use “drag and drop” OR **“Select files to upload”** button to upload files in the **“Transferred Files”** folder OR in the folder of your choice.

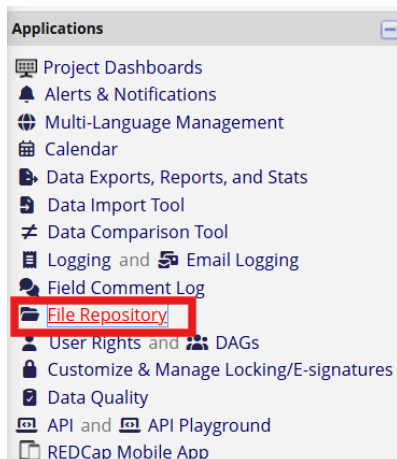
File Repository

The File Repository allows users to store, organize, and share files used for this project. Folders and subfolders can be created, and there is no limit to number of folders that can be created or the number of files that can be stored within them. If you are using Data Access Groups or user roles in the project, you may limit access to a new folder so that it is DAG-restricted and/or role-restricted. All deleted files will go to the Recycle Bin where they can be restored/undeleted for up to 30 days, after which they will be permanently deleted.



◆ FILE REPOSITORY DOCUMENTS

1. From Instance **S**, click on **File Repository** from the **Applications** menu.



2. Select the files you want to transfer with the project to instance **T** and then click **“Download”** button as shown below.

File Repository

The File Repository allows users to store, organize, and share files used for this project. Folders and subfolders can be created, and there is no limit to number of folders that can be created or the number of files that can be stored within them. If you are using Data Access Groups or user roles in the project, you may limit access to a new folder so that it is DAG-restricted and/or role-restricted. All deleted files will go to the Recycle Bin where they can be restored/undeleted for up to 30 days, after which they will be permanently deleted.

Drag and drop files here to upload

Select files to upload Create folder Download Delete Move

Show 25 entries Search in current folder

0 MB used

All Files

☐	Name	Size	Time Uploaded	Comments	Share	Delete	doc_id / folder_id
☒	Data Export Files	0 Files					
☒	Miscellaneous File Attachments	0 Files					
☒	Recycle Bin	0 Files					
☐	Transferred Files	0 Files			X		43

Showing 1 to 4 of 4 entries

Previous 1 Next

- In Instance **T**, go to your new project and click **File Repository** from the **Applications** menu.

Applications

- Project Dashboards
- Alerts & Notifications
- Multi-Language Management
- Calendar
- Data Exports, Reports, and Stats
- Data Import Tool
- Data Comparison Tool
- Logging and Email Logging
- Field Comment Log
- File Repository**
- User Rights and DAGs
- Customize & Manage Locking/E-signatures
- Data Quality
- API and API Playground
- REDCap Mobile App

- Create a new folder named **“Transferred Files”** (Best Practice)
- Use **“drag and drop”** OR **“Select files to upload”** button to upload files in the **“Transferred Files”** folder OR in the folder of your choice.

File Repository

The File Repository allows users to store, organize, and share files used for this project. Folders and subfolders can be created, and there is no limit to number of folders that can be created or the number of files that can be stored within them. If you are using Data Access Groups or user roles in the project, you may limit access to a new folder so that it is DAG-restricted and/or role-restricted. All deleted files will go to the Recycle Bin where they can be restored/undeleted for up to 30 days, after which they will be permanently deleted.

Drag and drop files here to upload

Select files to upload Create folder Download Delete Move

Show 25 entries Search in current folder

0 MB used

All Files **Transferred Files**

☐	Name	Size	Time Uploaded	Comments	Share	Delete	doc_id / folder_id
--------------------------	------	------	---------------	----------	-------	--------	--------------------

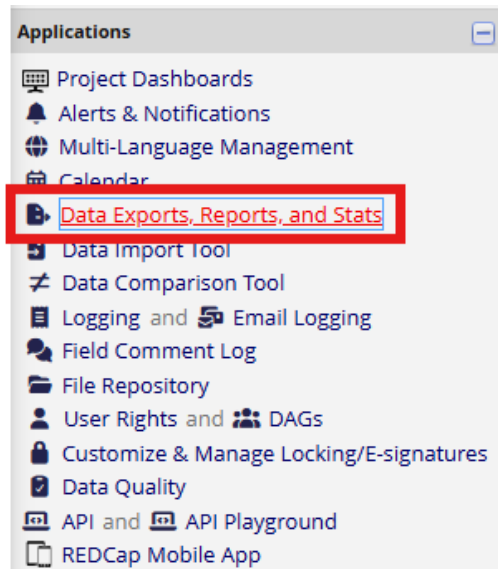
◆ SURVEY TIMESTAMPS

Survey timestamps are part of data-export, but they are not uploaded into the new projects as timestamp fields. It is good practice to keep (by uploading) the data file with timestamps in the **File Repository** of the target REDCap Instance **T**.

◆ FILE UPLOAD & SIGNATURE FIELDS

If any of your forms/instruments contain signatures or file upload, you must export those as XML to be able to import the files into the target project. Depending on the number of files, and the size of individual files, this can be a time-consuming process. If you need assistance with this part, please contact us for help.

1. Instance **S**, click on **Data Exports, Reports, and Stats** from the **Applications** menu.



2. In section B. **Selected instruments (all records)**, select the instrument that has files, and signature fields then click “Export Data”.

Data Exports, Reports, and Stats

■ VIDEO: How to use Data Exports, Reports, and Stats

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

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.

Report name	View/Export Options	Management Options	Report ID (auto-generated)	Unique report name (auto-generated)
A All data (all records and fields)	View Report Export Data Stats & Charts			
B Selected instruments (all records)	Select one or more instruments below for all records. Instruments -- All Instruments -- Demographics Randomization Form Baseline Data Month 1 Data View Report Export Data Stats & Charts + Create report based on the selections above			
1 Baseline Data	View Report Export Data Stats & Charts	Edit Copy Delete	8080	R-417JFJXWVF

[+ Create New Report](#)

3. You should see an image like the image below. Choose **CDISC ODM (XML)** as export format, change the Advanced data formatting option to “Export gray Form Status

fields with blank value” and click “Export Data” button.

- On the next screen, click the “CDISC ODM” icon to download the data file for the selected instrument containing signature fields. Save that file for the next step with an appropriate name.

- To **import** this data (files and signatures fields) into your migrated project, go to **Data Import Tool**. Click on the **CDISC ODM (XML) import** tab. Choose the file that was downloaded in the last step and upload this file. The files and signature data are also uploaded into migrated REDCap project.
- Another alternative option to export files that were uploaded into a project is to download a zip file of all the files. Go to **Other Export Options** tab on the next screen as shown below.

Data Exports, Reports, and Stats

VIDEO: How to use Data Exports, Reports, and Stats

+ Create New Report My Reports & Exports Other Export Options

Below are some additional export options that are available for your project. Instructions for each type of export are provided. You may click the corresponding icon on the right to download the file for each.

Export entire project as REDCap XML file (containing metadata & data)

The entire project (all records, events, arms, instruments, fields, and project attributes) can be downloaded as a single XML file, which is in CDISC ODM format (ODM version 1.3.1). This XML file can be used to create a clone of the project (including its data, optionally) on this REDCap server or on another REDCap server (it can be uploaded on the Create New Project page). Because it is in CDISC ODM format, it can also be used to import the project into another ODM-compatible system.

ZIP file of uploaded files (all records)

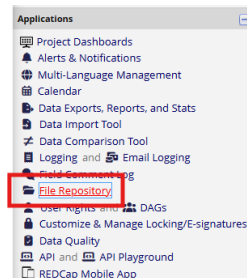
Uploaded files for all records in this project may be downloaded in a single ZIP file. This file contains any files uploaded for 'File Upload' fields/questions on a survey or data entry form. The ZIP file will contain a folder of all the files organized by record name and variable/field name and also contains an index.html file that serves as a table of contents for all the files. After downloading the ZIP file, extract all the files/folders to a directory on your local computer, after which you may double-click the index.html file inside to view a listing of the files using your web browser, or you may view the files directly by looking in the 'documents' folder. Click the icon to the right to begin downloading the ZIP file.

Note: if your project has a large amount of 'File Upload' fields/questions or records/responses, the resulting ZIP file may be very large in file size. Please be patient if the file takes time to download.

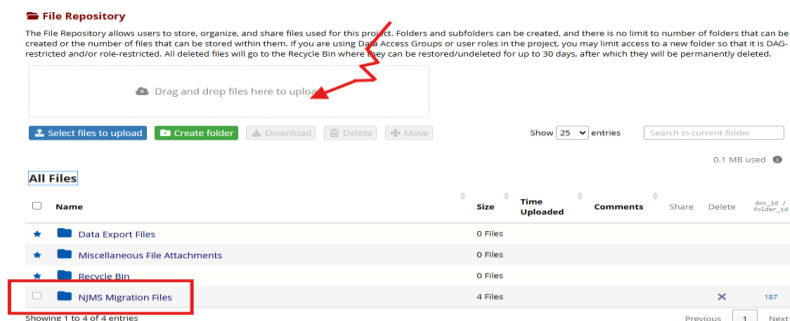
- Click the **Zip** icon in front of **Zip File of uploaded files (all records)**. This will be downloaded as a zip file onto your local computer.
- There are two options to keep these files in the target Instance T. These options are as follows:

Option 1: Upload the .zip to **File Repository** as archive.

- In Instance T, go to your new project and click **File Repository** link from the **Applications** menu.



- Create a new folder named “--- Migration Files” (Optional)
- Use “**drag and drop**” OR **Select files to upload** button to upload the Zip file in the “--- Migration Files” folder OR in the folder of your choice.



Option 2: (Not recommended) Manually upload each file to each record/field. This option can be very time-consuming and challenging to match records with files.

- a. Unzip the zip file containing the files of the transferred project. It is highly suggested to frame a sound system for keeping track of all the files to ensure the entirety and integrity of the upload process. It is suggested to have filenames based on the study id, instrument and field name.
- b. In the target instance T, click on Record Status Dashboard from the Data Collection menu. Click on the study id and then the instrument. A screen looks like the following will appear.

The screenshot shows the REDCap interface for editing an existing study ID (101). The form is divided into several sections: Study ID, Consent Information, Contact Information, Gender, Attach your Resume File, Form Status, and Lock this instrument?. A modal dialog box titled 'Upload file' is open, prompting the user to attach a resume file. The dialog box includes a 'Choose File' button, a file name '101_Resume.pdf', and an 'Upload file' button. The background form has various input fields and buttons like 'Save & Exit Form', 'Save & ...', and 'Cancel'.

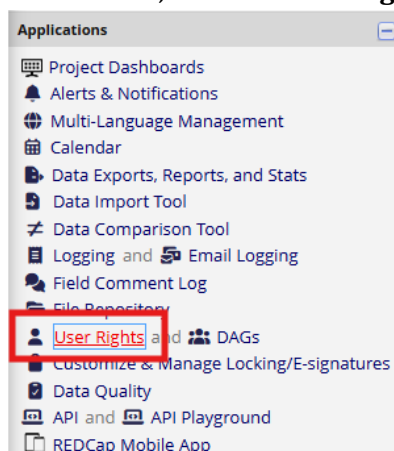
- c. Click on the **Upload file** link, a dialogue box as shown above will appear. Click on the Choose File button and select the file to upload, and then click Upload file button on the dialogue box.
- d. This process should be repeated for all instruments and fields.

◆ USER RIGHTS (OPTIONAL)

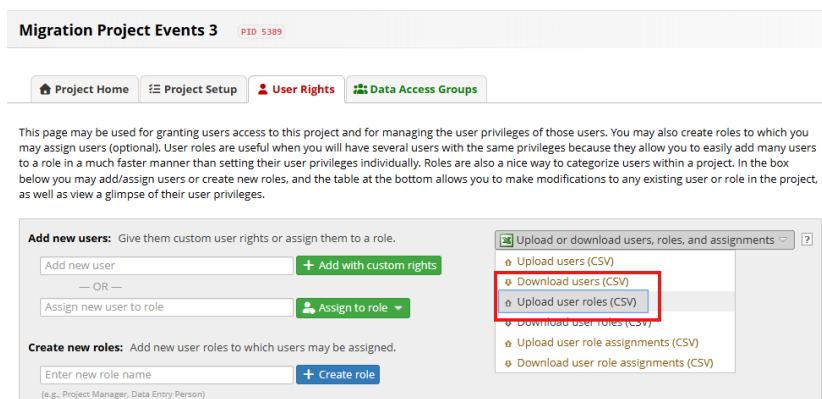
The User Roles (if defined) will be downloaded as part of XML project file. Some of the user settings will NOT be part of the XML file, they are limited to the REDCap instance. It is a

good idea to download 'User' information as CSV file and keep that file in the **File Repository** of the project in the new instance, i.e. Instance **T**.

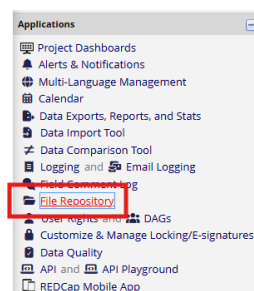
1. Instance **S**, click on **USER Rights** from the **Applications** menu.



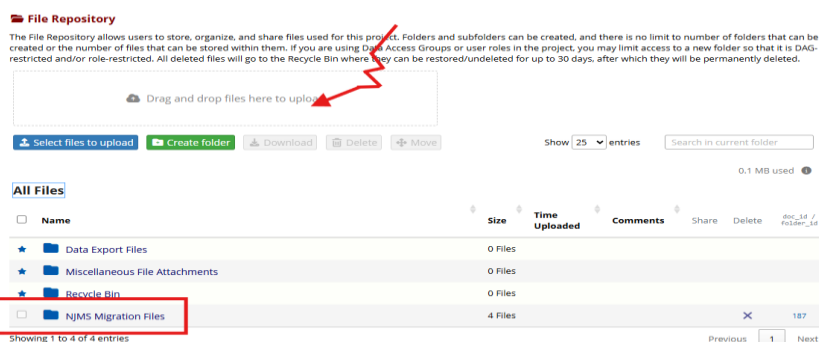
2. Go to **User Rights** tab from the top of the next screen as shown below and click on the **Upload or download users, roles and assignments** drop down menu depending on what you want to do.



3. In Instance **T**, go to your new project and click **File Repository** from the **Applications** menu.



4. Create a new folder named "--- Migration Files" (Optional)
5. Use "**drag and drop**" OR Select files to upload button to upload the Zip file in the "--- Migration Files" folder OR in the folder of your choice.



♦ RANDOMIZATION (IF APPLICABLE)

- **INACTIVE PROJECTS:** Projects where data collection is complete; no further steps need to be taken. The data stored is intact as produced by randomization. However, you can choose to archive the production allocation table from the source REDCap instance **S** in the file repository. This archived file can then be transferred to Target REDCap instance **T**.
- **ACTIVE PROJECTS:** Please contact REDCap administrators at redcap-help@oarc.rutgers.edu to export and re-establish randomization settings.

♦ e-CONSENT (IF APPLICABLE)

*Please contact your IRB to determine the protocol and you may need to make changes to your existing IRB protocol. The following instructions are only helpful for the REDCap technical side.

1. In Instance **S**, download consent files from **PDF Survey Archive** directory in the **File Repository**.
2. In Instance **T**, upload PDFs downloaded in the previous step to **File Repository** in the **Applications** section of the menu on the left. It is recommended to store these files in a separate folder.

⚠ Consult your IRB before proceeding with eConsent transfer. Some IRBs may require re-consenting in the new instance.

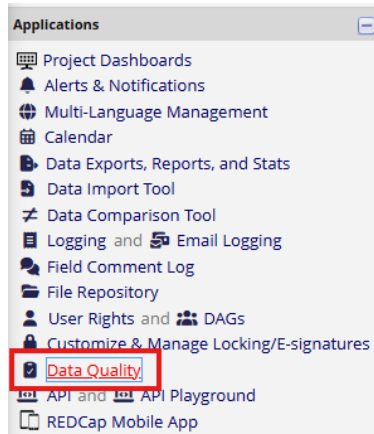
♦ SURVEY ALERTS and AUTOMATED SURVEY INVITATIONS (IF APPLICABLE)

- It is recommended that the Checkboxes for Alerts and Automated Survey Invitations should be unchecked / disabled before the project migration import. Re-enable these options in the Instance **T** project after migration process is completed and ready to collect the data.

Best Practices

- Not all metadata is included in the XML export.
- Always validate data accuracy and user permissions after transfer.

- The 'Data Quality' tool can be useful for this step. Run this tool for the projects in each instance. The results should be similar.



- Test with a dummy project if needed to practice.
- Change the status of the project in **Instance S** (Original Instance) to complete.

Contact Information

For questions, contact your REDCap administrator: redcap-help@oarc.rutgers.edu