

## Steps for Backing up your Projects(s)

**Please Note: Users may need to edit their User Rights or have their User Rights edited by a Project Owner in order to accomplish some of the steps below. Please ensure User Rights have been reviewed before reaching out to REDCap Admin for support.**

Project Design and Setup	User Rights	Data Access Groups	Data Export Tool	Reports & Report Builder	Graphical Data View & Stats	Manage Survey Participants	Calendar	Data Import Tool	Data Comparison Tool	Logging
✓	✓	✓	De-Identified	✓	✓	✓	✓	✗	✗	✗
✓	✓	✓	Full Data Set	✓	✓	✓	✓	✓	✓	✓

**Step 1:** Export and save your data to a **secure and approved Lifespan device or server.**  
Applications - > Data Exports, Reports, and Stats.








My Reports & Exports	
Report name	View/Export Options
A <b>All data</b> (all records and fields)	<input type="button" value="View Report"/> <input type="button" value="Export Data"/>

Choose export format: CSV/Microsoft Excel (**raw data**). You may also choose to export as CSV/Microsoft Excel (**labels**).

Exporting "All data (all records and fields)"

Select your export settings, which includes the export format (Excel/CSV, SAS, SPSS, R, Stata) and if you wish 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**
-  **CDISC ODM (XML)**

**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](#)

**Additional export options**

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

[Step 2:](#) Save a copy of your data dictionary. Project Setup tab -> Data Dictionary -> Download the current Data Dictionary.

The screenshot shows the 'Project Setup' tab in a software interface. At the top, there are three navigation buttons: 'Project Home', 'Project Setup', and 'Other Functionality'. Below this, the 'Project status' is shown as 'Development'. The main content area is divided into two sections, both marked as 'Not started' with a red 'X' icon and an 'I'm done!' button.

**Main project settings**

- Disable  Use surveys in this project? [?]
- Disable  Use longitudinal data collection with define
- Modify project title, purpose, etc.

**Design your data collection instruments & enable**

Add or edit fields on your data collection instruments (su either using the Online Designer (online method) or by up method). You may then enable your instruments to be u Quick links: [Download PDF of all instruments](#) OR [Downlo](#).

Go to  or

You may also browse for pre-built data collection instrum

At the bottom of the screenshot, the navigation buttons are 'Project Home', 'Project Setup', 'Online Designer', and 'Data Dictionary'.

This module will allow you to create new data collection instruments/surveys or edit existing one using the **Online Designer** or **Upload Data Dictionary** (see tabs above), in which you may use Designer may help you get some initial fields/forms built quickly or to make quick edits, but using 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 modify method called the Data Dictionary. The Data Dictionary is a specifically formatted CSV (comma de construct your project fields and afterward upload the file here to commit the changes to your p

Click the 'Browse' or 'Choose File' button below to select the file on your computer, and upload it Once your file has been uploaded, changes will NOT immediately be made but will be displayed a all the formatting in your Data Dictionary is correct before official changes are made to the projec project's current Data Dictionary will be created automatically during the Data Dictionary upload Data Dictionary. The snapshot can later be accessed and downloaded from the Project Revision I

#### Need some help?

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

#### Steps for making project changes:

- 1.) [Download the current Data Dictionary](#)
- 2.) Edit the Data Dictionary (see the [Help & FAQ](#) for help)

[Step 3:](#) Export and save your project log. Applications -> Logging -> Download entire logging record to Microsoft Excel (csv).

This module lists all changes made to this project, including data exports, data changes, and the creation or deletion of users.

Filter by event: All event types (excluding page views) ▾  
Filter by user name: All users ▾  
Filter by record: All records ▾  
Displaying events (by most recent): 1 - 100 ▾  
Filter by time range from  to

[Step 4: Download your projects metadata and data in XML format and save to a secure and approved Lifespan device or server.](#) Other Functionality tab -> Download metadata & data (XML)

### Copy or Back Up the Project

[Copy the project](#)

**Make an exact duplicate of this project.** All project fields will be copied over, and you will be prompted to set the title and info for the new project. You may choose to copy or not copy the existing data in the current project to the new one.

[Download metadata only \(XML\)](#)

[Download metadata & data \(XML\)](#)

**Download a backup of this project.** 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.

NOTE: The exported XML file does *not* contain the project's logging history (audit trail), but if you wish to obtain it, you may freely download it any time at the top of the Logging page.