

REDCap - Steps to move a project from the Internal Database to the External Database ([without data](#))

Step 1

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

Project status: Development Completed steps **0** of **7**

Main project settings

Not started

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

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

Design your data collection instruments & enable your surveys

Not started

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

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

Learn how to use

- 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.

[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

- While still 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 and 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 3

- The user will need to recreate the project on the External database by using the Data Dictionary 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)*

Start project from scratch or begin with a template?


- Use a template (choose one below)
- Create an empty project (blank slate)

○ 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 4

- 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*.



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

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

Learn how to use

- 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](#)

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 **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).


 [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 5

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