




Coping & Archiving Projects

Did you know that you can copy existing projects as well as archive projects that are not in use? To access these functionalities, navigate to “*Other Functionality*” tab on your Project Setup page.


Copying Projects allows you to copy the fields and the entire project set up. It is optional to copy data over to the new project. This is useful if you have a reoccurring project such as an annual database.


Archiving Projects can be used for projects that are no longer in use, and do not want to be deleted. It will be removed from your “My Projects” list, and can be reactivated at any point.

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)


Include the following in the XML file:

- ☒ User Roles
- ☒ Record Status Dashboards
- ☒ Reports
- ☒ Surveys and survey settings
- ☒ Automated Survey Invitations
- ☐ Leave ASIs enabled (unless disabled)


Download a backup of this project. 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.

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.


Project Management

 Request delete project

You may completely remove this project, in which all its data will be permanently deleted also.

 Move to inactive status

Move the project to inactive status if data collection is complete. This will disable most project functionality, although all collected data will remain intact. Once inactive, the project can be moved back to production status at any time.

 Archive the project

You may archive the project if you do not wish to use it any longer. Archiving the project will take it offline and remove it from your list of projects. It can only be accessed again by clicking the *Show Archived Projects* link at the bottom of the *My Projects* page. You will be able to un-archive the project at any time and bring it back online simply by accessing it again and returning to this page.

UPCOMING EVENTS

BASIC CLASSES:

Thursday, November 21st, 2 - 3:30pm

Thursday, December 5th, 2 - 3:30pm

Please complete a [Service Request Form](#) to register for the class

OFFICE HOURS:

Bailey Power Plant, CTSI Offices, 4th floor

8am – 11am

Thursday, November 14th

Thursday, December 12th

Meads Hall, CTSI Suite, 1st Floor

1:30pm – 4:30pm

Wednesday, November 27th

No appointment necessary