

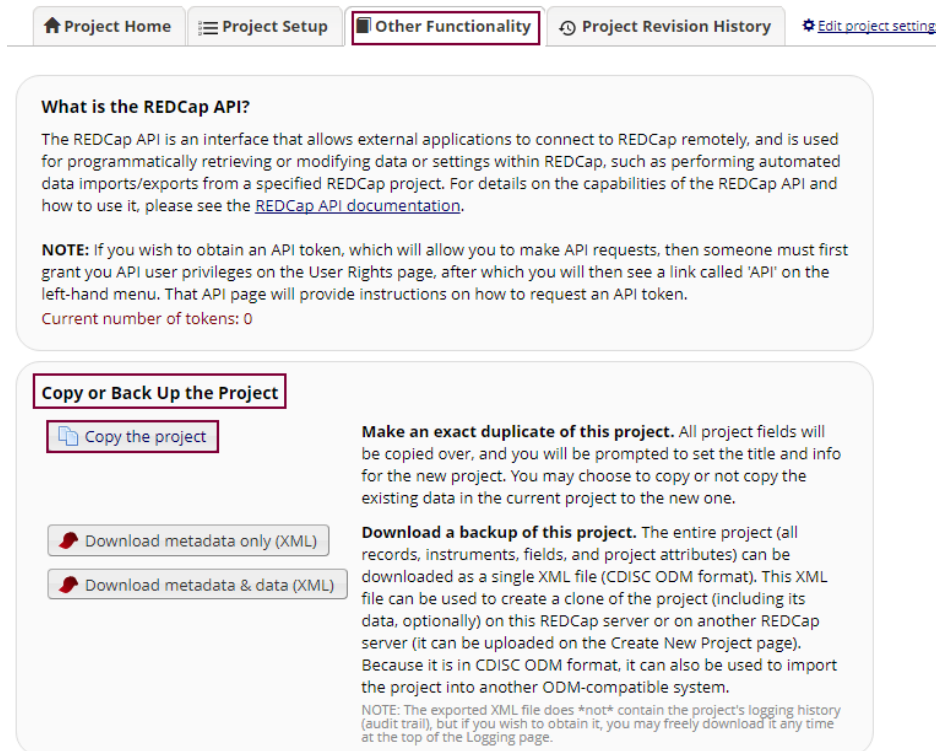
## Copying an existing REDCap project to a new REDCap project

REDCap enables you to be able to copy an existing project from within the same REDCap instance you are using and that you have permission to access.

**Please Note:** You need to have copy project permissions if you do not please email the UoM REDCap administrators to ask how to obtain this access.

### Creating a project from an existing data dictionary

1. Log into REDCap
2. Select your required project from the 'My Projects' tab that you want to copy and create a new project of
3. On the 'Other Functionality' tab, under 'Copy or Back up the Project' select the 'Copy Project' button



The screenshot shows the 'Other Functionality' tab in the REDCap interface. The navigation bar includes 'Project Home', 'Project Setup', 'Other Functionality' (highlighted), 'Project Revision History', and 'Edit project settings'. Below the navigation bar, there are two main sections:

**What is the REDCap API?**  
The REDCap API is an interface that allows external applications to connect to REDCap remotely, and is used for programmatically retrieving or modifying data or settings within REDCap, such as performing automated data imports/exports from a specified REDCap project. For details on the capabilities of the REDCap API and how to use it, please see the [REDCap API documentation](#).

**NOTE:** If you wish to obtain an API token, which will allow you to make API requests, then someone must first grant you API user privileges on the User Rights page, after which you will then see a link called 'API' on the left-hand menu. That API page will provide instructions on how to request an API token.  
Current number of tokens: 0

**Copy or Back Up the Project**

[Copy the project](#)

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

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

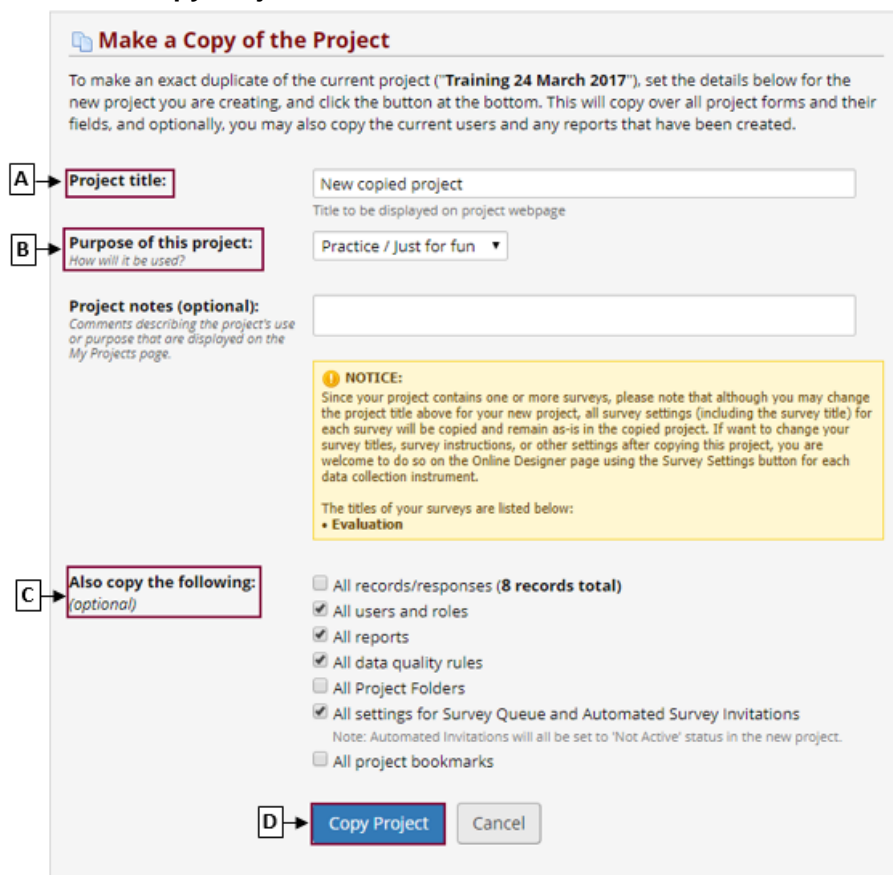
**Make an exact duplicate of this project.** All project fields will be copied over, and you will be prompted to set the title and info for the new project. You may choose to copy or not copy the existing data in the current project to the new one.

**Download 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.

## REDCap How To guide

4. On the **'Make a Copy of the Project'** tab, check the following and update or select where required:
  - a. **Project Title:** Change this title so you can distinguish between the project you are creating a copy from and the new project
  - b. **Purpose of this project:** Change the dropdown list selection and any other information if this option or any of the details have changed
  - c. **Also copy the following:** If you want to copy all the records, or keep any of the reports, setting, reports etc., select the required tickbox to copy the information to the new project
  - d. Select the **'Copy Project'** button



**Make a Copy of the Project**

To make an exact duplicate of the current project ("Training 24 March 2017"), set the details below for the new project you are creating, and click the button at the bottom. This will copy over all project forms and their fields, and optionally, you may also copy the current users and any reports that have been created.

**A** → **Project title:**   
Title to be displayed on project webpage

**B** → **Purpose of this project:**   
*How will it be used?*

**Project notes (optional):**  
*Comments describing the project's use or purpose that are displayed on the My Projects page.*

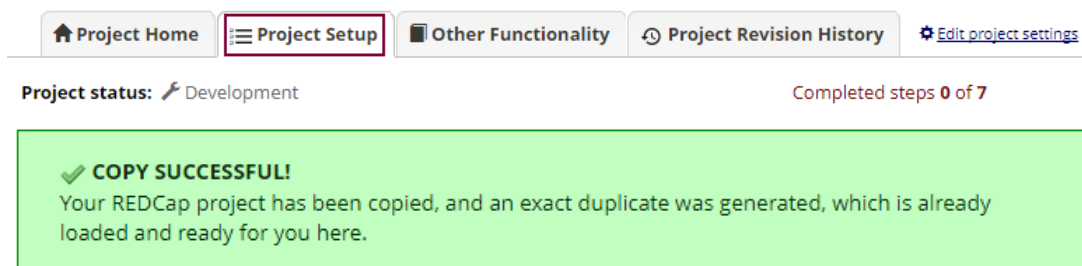
**NOTICE:**  
Since your project contains one or more surveys, please note that although you may change the project title above for your new project, all survey settings (including the survey title) for each survey will be copied and remain as-is in the copied project. If want to change your survey titles, survey instructions, or other settings after copying this project, you are welcome to do so on the Online Designer page using the Survey Settings button for each data collection instrument.  
The titles of your surveys are listed below:  
• Evaluation

**C** → **Also copy the following:** *(optional)*

- All records/responses (8 records total)
- All users and roles
- All reports
- All data quality rules
- All Project Folders
- All settings for Survey Queue and Automated Survey Invitations  
Note: Automated Invitations will all be set to 'Not Active' status in the new project.
- All project bookmarks

**D** →

5. Once the changes have been made and successfully committed, taken to the **'Project Setup'** tab and advised your project has been successfully copied. You can continue to setup your project and make any required change to the instruments on the online designer



Project Home | **Project Setup** | Other Functionality | Project Revision History | [Edit project settings](#)

Project status: Development Completed steps 0 of 7

**COPY SUCCESSFUL!**  
Your REDCap project has been copied, and an exact duplicate was generated, which is already loaded and ready for you here.