



Preparing people to lead extraordinary lives

INTRODUCTION

INTENDED AUDIENCE

This document is intended for researchers who have an existing study project on the internal Loyola REDCap site who need to recreate or transfer their project to the external REDCap site. The external REDCAP site is only intended for projects requiring direct external access from the internet. Use of the external REDCAP site requires prior approval, and can be requested using the [External REDCap Access Request Form](#) on the IT Service Portal.

WHAT IS THE EXTERNAL REDCAP SITE?

The external REDCap site is a separate site that can be directly accessed from outside the Loyola enterprise network. Examples of potential activities needing direct external access include e-consent of study participants, distribution of surveys to study participants, and coordination of multi-center trials. External REDCap users must have valid Loyola University Chicago (LUC) credentials and utilize multifactor authentication (MFA). Non-Loyola users must be registered and active as a “non-affiliate person” (NAP). The process for requesting a NAP account can be found here: [Request NAP Account](#). Requests for NAP accounts must be initiated by a Loyola sponsor. NAP accounts must be active prior to requesting access to the External REDCap site.

MIGRATION STEPS

EXPORT THE PROJECT METADATA

First, log-in to the internal REDCap site: <https://hsddb.luhs.org/redcap/>

Note: Your login information for the internal REDCap site is separate from your UVID and password.

Open your project from your My Projects list.

Navigate to the Other Functionality tab.





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There are two options to download the project metadata. The metadata can be downloaded by itself with the “Download metadata only (XML)” option. This should be chosen when you want to copy the project to the external REDCap site without its data. Conversely, you should use the “Download metadata & data (XML)” option if you want to copy the project to the external REDCap site with its existing records.

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 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.

 **Download metadata & data (XML)**

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.

The downloaded XML file will have a name like: MigrationExampleProj_2020-10-28_1549.REDCap.xml

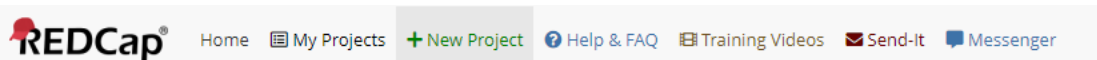
Make sure to note where you save the XML file. If you have chosen to export the existing records as well, make sure to save the file to a secure location such as the IRB research drive since this could contain PHI.

CREATE A NEW PROJECT IN THE EXTERNAL REDCAP

Log-in to the external REDCap site <https://hscrc.luc.edu/redcap/>

Note: The external REDCap site uses your UVID and password.

Create a new project by clicking “New Project” in the top menu



Fill in the appropriate project title and information. When you choose “Research” as the Purpose of this project, new fields open up for the PI and IRB number.



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Project title:
Title to be displayed on project webpage

Purpose of this project:
How will it be used?

Name of P.I. (if applicable):
First name MI Last name

Email of P.I. (if applicable)

Name of P.I. as cited in publications (if applicable): (e.g., Harris PA)

IRB number (if applicable):

Please specify:

- ☐ Basic or bench research
- ☒ Clinical research study or trial
- ☐ Translational research 1 (applying discoveries to the development of trials and studies in humans)
- ☐ Translational research 2 (enhancing adoption of research findings and best practices into the community)
- ☐ Behavioral or psychosocial research study
- ☐ Epidemiology
- ☐ Repository (developing a data or specimen repository for future use by investigators)
- ☐ Other

Choose to start the project by uploading a REDCap project XML file. Select the XML file downloaded earlier using “Choose File”.

Start project from scratch or begin with a template?

- ☐ Create an 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)

After choosing the XML file, click “Create Project”.



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Start project from scratch or begin with a template?

☐ Create an empty project (blank slate)

☒ Upload a REDCap project XML file (CDISC ODM format) [?](#)

Select XML file: MigrationExampleProj_2020-10-28_1549.REDCap.xml

☐ Use a template (choose one below)

☐	Longitudinal Database (1 arm)	Contains nine data entry forms (beginning with a demography form) for collecting data longitudinally over eight different events.
☐	Longitudinal Database (2 arms)	Contains nine data entry forms (beginning with a demography form) for collecting data on two different arms (Drug A and Drug B) with each arm containing eight different events.
☐	Multiple Surveys (classic)	Contains three surveys and a data entry form. Includes a pre-screening survey followed by two follow-up surveys to capture information from the participant, and then a data entry form for final data to be entered by the study... Show more
☐	Multiple Surveys (longitudinal)	Contains three surveys and a data entry form. Includes a pre-screening survey followed by two follow-up surveys, one of which is a questionnaire taken weekly to capture participant information longitudinally over a period of... Show more
☐	Single Example Project	Contains a single data collection instrument enabled as a survey, which contains questions

The new project will be in Development so you can make changes if needed. Confirm all of your forms and settings match the original project, then move the project to Production at the end of the Project Setup tab.

Move your project to production status

Move the project to production status so that real data may be collected. Once in production, you will not be able to edit the project fields in real time anymore. However, you can make edits in Draft Mode, which will be auto-approved or else might need to be approved by a REDCap administrator before taking effect.

Go to

Once the project is in production the process is complete.

ADDITIONAL INFORMATION

REDCAP

General information about REDCap can be found at the Project REDCap website:

<https://www.project-redcap.org/>

Both the internal and external REDCap sites are on version 10.3.8.



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TRAINING

REDCap tutorials can be found at the Project REDCap website:

<https://projectredcap.org/resources/videos/>

The Clinical Research Office's Biostatistics Core offers help with REDCap training and database development. The CRO request form can be found on their website:

<https://hsd.luc.edu/cro/>

QUESTIONS AND COMMENTS

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