# Project Back Up and Duplication

Complete project exports can be created for the purposes of sharing a REDCap project with an external collaborator or archiving. By default, REDCap projects should be set to either **inactive** status or **archived** status within the REDCap application and scheduled for deletion with a REDCap administrator according to the [University of Maryland Records Retention Schedule](#).

REDCap allows for two types of project-level backups:

1. **Metadata only**: The XML file will contain all project attributes, instruments, and fields, but will not contain records or audit logs.
2. **Metadata and data:** The XML file will contain all project attributes, instruments, fields, and records, but will not include audit information. Downloading and storing metadata and data XML backups is only recommended for projects containing deidentified data or for research groups with access to storage systems rated to appropriately handle sensitive or restricted data (please refer to the [University of Maryland Data Classification Standards](#)).

## Procedures for Exporting Projects with or without Data

1. **Navigate to the project.**
2. **Select the Project Home tab or link.**
3. **Select the Other Functionality tab (Figure 1).**
4. **Under the Copy or Back Up the Project section (Figure 2):**
   - Click the 'Download metadata only (XML)' to download a copy **without data,**

   **-OR-**

   - Click the 'Download metadata & data (XML)' to download a copy **with individual records.**[*]

*Choosing to download a copy of metadata and data will open a new window with de-identification options. Be **ADVISED** that choosing to **'Remove All Tagged Identifiers'** will only de-identify fields that have been explicitly marked as identifiers during the project design phase.

Selecting **'Remove Unvalidated Text Fields'** will strip all free-text from the project except for text fields that have been <u>explicitly defined during the project design phase</u> as date, numeric, or integer.

A copy of a REDCap project can also be created directly within the system to prevent downloading sensitive information or to duplicate a project structure for re-use in another project.

**Figure 1**

Project navigation options with Other Functionality highlighted.



**Figure 2**

Project duplication and backup options.

# Procedures for Duplicating a REDCap Project

1. **Navigate to the project.**
2. **Select the Project Home tab or link.**
3. **Select the Other Functionality tab.**
4. **Under the copy or Back Up the Project section, click the 'Copy the project' button to create an exact duplicate of the project (Figure 2).**
5. **A new page will load with prompts to enter new project specific information.**
6. **Options exist for copying records, user roles, reports and data quality rules, project folders, survey queue and invitation settings, and bookmarks and custom dashboards (Figure 3).**
7. **Select 'Copy Project' once you have filled out the copied project's information and selected optional parts of the original project to copy over.**

**Figure 3**

Additional options for copying project data.

- ☐ All records/responses (**0 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
- ☐ All custom record status dashboards