



FREQUENTLY

QUESTIONS

ASKED

REDCap FAQ Series

“How do I export and share my REDCap Project Forms (or Instruments) with my colleague?”

“How do I transfer my REDCap Project from the STAGING Server to the PRODUCTION Server?”

Data Collection Instruments

Add new instrument:

- [Create](#) a new instrument from scratch
- [Upload](#) instrument ZIP file from another project/user or [external libraries](#)

Instrument name	Fields	View PDF	Instrument actions
Demographics	1		Choose action ▾
Rits And Sbsibs Screening	15		Choose action ▾
Followup Checklist	93		Choose action ▾
Fio55	11		Choose action ▾
Culture Positivity	55		Choose action ▾
Close Out Visit	5		Choose action ▾

Introduction

About this Guide

This Guide is intended as a FAQ on how Users can share their REDCap Project Forms (Instruments) and transfer REDCap Projects from the Staging Server to the Production Server.

This Guide has been written for only internal use by the National Healthcare Group (NHG) and her Institutions.

This User Guide is written based on REDCap Version **8.5.27**.

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Important Information for all NHG REDCap Users



IMPORTANT

The **HUMAN BIOMEDICAL RESEARCH ACT (HBRA)** (Section 27) states that:

*"Every person who has obtained individually-identifiable information or human biological material for the purposes of human biomedical research must take all reasonable steps and safeguards as may be necessary, including rendering information or material non-identifiable, to protect such information or material against accidental or unlawful loss, modification or destruction, or unauthorised access, disclosure, copying, use or modification. **Any person who contravenes these requirements in HBRA shall be guilty of an offence and shall be liable on conviction to a fine or to imprisonment or to both.**"*

- All REDCap Project data collection activities must be carried out in strict adherence to the requirements by the **NHG Domain Specific Review Boards (DSRB)**, **Human Biomedical Research Act (HBRA)**, **Personal Data Protection Act (PDPA)** and any other applicable regulations where applicable to protect the data and Study Participants' privacy and confidentiality.
- All Users of the NHG REDCap system must abide by the all applicable Legislation, Regulations and Policies governing human biomedical research activities, the use of computer systems as well as the collection, storage, protection and use of data in Singapore and in NHG.
- All REDCap users must read the NHG REDCap System Usage Agreement ([available for download here](#)) to understand their obligations and responsibilities before using the NHG Research Database Platform (REDCap).

Acknowledgements

The NHG REDCap Team would like to acknowledge the REDCap Consortium and its Members for providing the valuable guidance and reference resources that have enable this Guide to be written.

Important Pre-Requisites

In order for you to access the REDCap Project's Data Dictionary file, or to be able to carry out the steps described in this FAQ, **you must first meet the following requirements.**

- Able to login to the appropriate NHG-REDCap Server
- Have access to the appropriate REDCap Project
- Have been assigned the [[Project Design and Setup](#)] User-Right for that REDCap Project.



IMPORTANT

The “**Project Design and Setup**” User-Right is a **Highest-Level Privilege** in the REDCap Project.

For all new REDCap Projects on the Production Server, only the Project Owner and one Project Administrator are initially assigned this User-Right.

We recommend that only a limited number of users (*such as senior Project members who are familiar with REDCap*) are assigned this User-Right. The

All Users and their assigned User-Rights and User-Roles, **must be properly documented** in your Site Study File, under the ‘**Study Delegation Log**’.

FAQ 1: How do I export and share my REDCap Project Forms with my colleague?

If you want to share your **entire** REDCap Project (*ie: all Forms and Data Variables, except Project Settings*), you can share the Project's **Data Dictionary** file with your colleague.

- See [Section \(A\)](#) to understand what a REDCap Project's Data Dictionary is.
- Download the Data Dictionary file by following the instructions in [Section \(B\)](#) and [Section \(C\)](#).
- Import the Data Dictionary file into a REDCap Project by following the instructions in [Section \(D\)](#).
- If you encounter errors when importing the Data Dictionary file, you can see [Section \(E\)](#).

FAQ 2: Can I share the Data Dictionary file?

Generally, you should be able to share the Data Dictionary file as there is **NO COLLECTED DATA** from your REDCap Project contained inside the Data Dictionary file.

The Data Dictionary file only includes information that **ONLY** defines **ALL** of the **FORMS** and **DATA VARIABLES** found in a REDCap Project. (See [Section \(A\)](#) to understand what a REDCap Project's Data Dictionary is.)

However, you may need to consider the following factors before sharing your Data Dictionary file.

- *Copyright issues*
- *Confidentiality of any Proprietary information and Intellectual property*
- *Disclosure of sensitive Questions, Data Variables or Research activities*
- *Restrictions by Institution policy or processes*

Do consult with your Head of Department or appropriate equivalent authority if any of these apply to you.

FAQ 3: How do I transfer a REDCap Project from the STAGING Server to the PRODUCTION Server?

Download the Data Dictionary file of your Project on the **STAGING Server** by following the instructions in [Section \(B\)](#) and [Section \(C\)](#) of this Guide.

Once you **have requested for, and obtained your REDCap Project*** on the **PRODUCTION Server**, just import the downloaded Data Dictionary file into the Project by following the instructions in [Section \(D\)](#).



NOTE

Requesting for a REDCap Project on the Production Server

- To request for a REDCap Project, the **Overall Study Principal Investigator (Project Owner)** must complete the **REDCap Project Request Form** and email back to us.
- The REDCap Project Request Form is available for download here:

<https://www.research.nhg.com.sg/wps/wcm/connect/6f53eb004dfb3274ab50ab2e965eee87/1305-001+NHG+REDCap+Project+Request+Form+v3.docx?MOD=AJPERES>



IMPORTANT

Clarification of function: [Move Project to Production]



Not started

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 [Move project to production](#)

- The function **[Move Project to Production]** is used to change the **DATA-PROTECTION Mode** of the REDCap Project, from **Development-Mode** to **Production-Mode**.
- This Function **DOES NOT “TRANSFER” OR “MOVE”** a REDCap Project from the **Staging-Server** to the **Production-Server**.
- In addition, this Function **DOES NOT** submit any request to **“TRANSFER” OR “MOVE”** a REDCap Project from the **Staging-Server** to the **Production-Server**.
- If you have created a REDCap Project on the **Staging Server** (and you want to use it for actual data collection), you will need to ‘manually’ transfer your REDCap Project from the **Staging Server** to the **Production Server** (as described in **FAQ 3**) **AFTER** you have requested for a Project for the Production Server.

FAQ 4: How do I export the entire REDCap Project (*all Forms, Data Variables and Project Settings BUT WITHOUT any project data*) to my collaborators OUTSIDE of NHG?

If you want to share your **entire** REDCap Project (*ie: all Forms, Data Variables and Project Settings BUT WITHOUT any project data*), you can share the Project's **XML file** with your collaborators.

Simply download the Project XML file by following the instructions in [Section \(I\)](#) and [Section \(J\)](#) in this Guide.

Your collaborators can import the Project XML file as a new REDCap Project by following the instructions in [Section \(K\)](#).

FAQ 5: How do I export and share a specific Form?

If you want to export and share a single, specific Form from your REDCap Project, you can do so by following the instructions in [Section \(F\)](#).

To import a single, specific Form into a REDCap Project, you can do so by following the instructions in [Section \(G\)](#).

SECTION (A): What is the Data Dictionary of a REDCap Project?

The **Data Dictionary** is a system-generated spreadsheet (*in .CSV file format*) that **ONLY** defines **ALL** of the **FORMS/INSTRUMENTS** and **DATA VARIABLES** found in a Project.

It is important to remember that the Data Dictionary **DOES NOT** define:

- Any of the collected data points/records in the Project
- Users, User-Rights, User-Roles and Data Access Groups
- Reports
- Events (*for Projects in Longitudinal mode*)
- Surveys (*including survey settings and queues*)
- Schedules and Events/Appointments (*from the Project calendar*)
- Subject Randomization settings
- Custom Data Quality rules
- Any other Project Settings or attributes

SECTION (B): Where is the REDCap Project's Data Dictionary file for download?

The Data Dictionary can be found by going to the **[Project Setup]** section (see Fig 1).

Click on the **[Data Dictionary]** button. The Data Dictionary section will then be shown onscreen (see Fig 2).

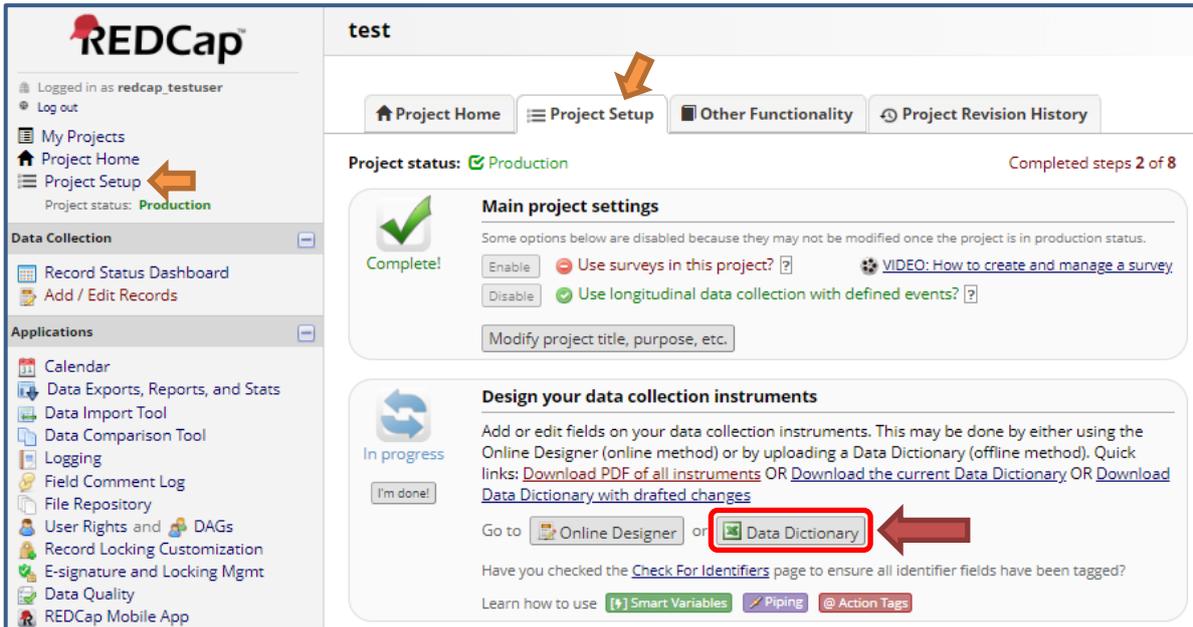


Fig 1: Project Setup section

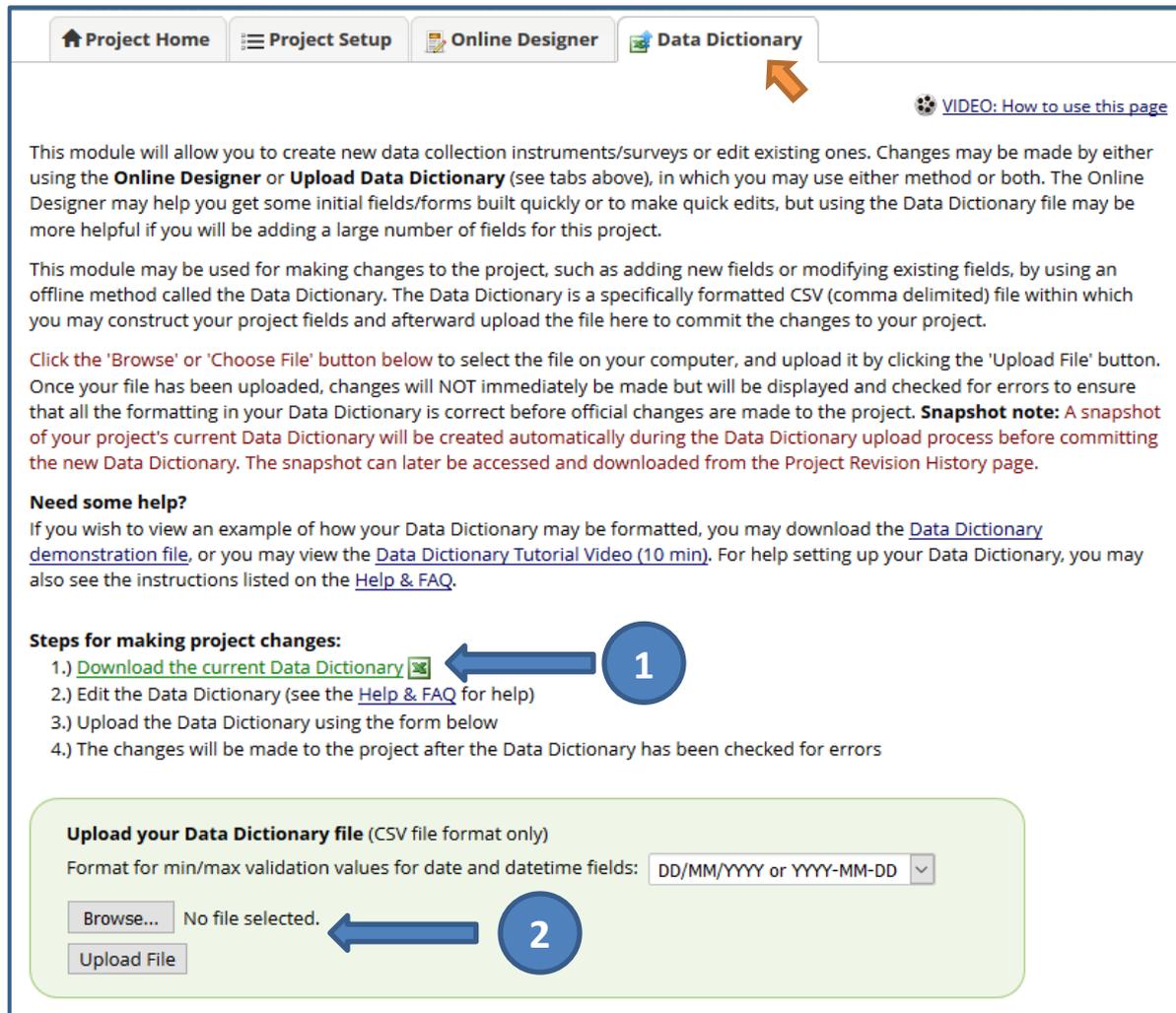


Fig 2: Data Dictionary section

SECTION (C): Downloading the Project's Data Dictionary file

When you download the REDCap Project's Data Dictionary file, you are actually downloading a file (.csv file) that defines **ALL** of the current **FORMS/INSTRUMENTS** and **DATA VARIABLES** found in a Project.

Here are the steps to download a REDCap Project's Data Dictionary file.

- (1) See the area marked as [1] in Fig 2.
- (2) Click on the link [**Download the current Data Dictionary**] and save the resulting file to your computer.

SECTION (D): Uploading a Data Dictionary file into a REDCap Project

When you upload a Data Dictionary file into a REDCap Project, you are actually importing **ALL** of the Forms/Instruments and Data Variables that are being defined in that Data Dictionary file.



NOTE

Uploading a new Data Dictionary **WILL OVERWRITE (NOT UPDATE)** the current Data Dictionary present in the REDCap Project.

Any pre-existing Forms/Instruments and Data Variables present in the REDCap Project **WILL BE OVERWRITTEN** by the imported Data Dictionary.

Here are the steps to upload a Data Dictionary file to a REDCap Project.

- (1) See the area marked as [2] in Fig 2.
- (2) Click on the [**Browse**] button to locate the Data Dictionary file on your computer.
- (3) Once that is done, click on the [**Upload**] button to upload the Data Dictionary file into the REDCap project.
- (4) The REDCap system will inform you of the changes to be made (if any), and ask for your **confirmation to proceed** (see Fig 3).
- (5) See [Section \(E\)](#) if there are errors found in the Data Dictionary.
- (6) If there are no errors, click on [**Commit Changes**] to proceed, or [**Cancel**] to stop the process.

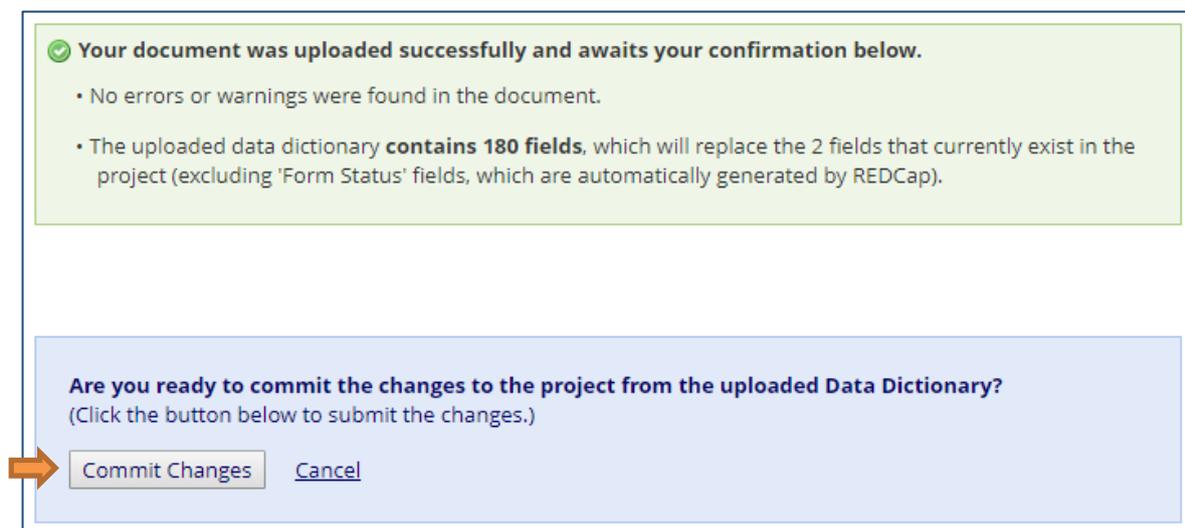


Fig 3: Uploading a Data Dictionary – Confirmation dialogue

SECTION (E): Errors found in your Data Dictionary

After clicking on the **[Commit Changes]** button, do note that the changes are **NOT IMMEDIATELY** made to the Project.

Instead, the REDCap system will first check the uploaded Data Dictionary file for any errors to ensure that all the formatting in your Data Dictionary is correct before the changes are made to the project.

If you have not opened and changed anything in the downloaded Data Dictionary, it is unlikely there will be any errors when the Data Dictionary is uploaded.

However, if there are errors found in the uploaded Data Dictionary, the changes **will be rejected** and **no changes will be made** to the Project.

The REDCap system will then list all the errors and their corresponding cell locations in the Data Dictionary (**Fig 4**).

You will **need to resolve these Errors** in the Data Dictionary file before you can use it for uploading to the REDCap Project.

The screenshot shows a web interface with a 'RETURN TO PREVIOUS PAGE' button at the top left. Below it is a red-bordered box containing an error message: 'Your data dictionary could NOT be uploaded because of the errors listed below. Please correct these errors and try uploading your data dictionary again.' The main heading is 'Errors found in your Data Dictionary:'. The first error states that variable/field names were duplicated, with 'first_icu_date (A4)' listed. The second error mentions syntax errors in calc field equations, with 'rit_diff2 (F14)' listed. The third error points to a syntactical error in branching logic for cells L9 through L154. A callout box with arrows pointing to 'first_icu_date (A4)', 'rit_diff2 (F14)', and the cell list explains that the letters in parentheses refer to the cell location in the CSV file. The final error lists fields with syntax errors in branching logic, including 'first_rit_cul (L9)', 'cul1_spec1 (L10)', 'rit_infection2 (L12)', 'rit_diff2 (L14)', 'text_cul1 (L15)', 'text_cul2 (L16)', 'fio2_2 (L118)', 'urine_cul (L123)', 'month_doe (L127)', 'date_doe (L128)', 'iuc_status (L129)', 'lcbi_symp (L150)', 'month_doe_clabsi (L153)', and 'date_doe_clabsi (L154)'.

RETURN TO PREVIOUS PAGE

ⓘ Your data dictionary could NOT be uploaded because of the errors listed below. Please correct these errors and try uploading your data dictionary again.

Errors found in your Data Dictionary:

The following variable/field names were duplicated. Please rename these field names so that they only appear once.

first_icu_date (A4)

There are syntax errors in some calc field equations. This may occur if illegal characters or illegal functions are used in the calc field equation. Please remove all syntax errors. Below are the calc fields that contain syntax errors in their equation.

rit_diff2 (F14)

This refers to the Cell location in the Data Dictionary file. (CSV format)

There is a syntactical error in the branching logic for the following cells: **L9, L10, L12, L14, L15, L16, L118, L123, L127, L128, L129, L150, L153, L154**

There are syntax errors in some branching logic. This may occur if illegal characters or illegal functions are used in the branching logic. Please remove all syntax errors. Below are the fields that contain syntax errors in their branching logic.

first_rit_cul (L9)
cul1_spec1 (L10)
rit_infection2 (L12)
rit_diff2 (L14)
text_cul1 (L15)
text_cul2 (L16)
fio2_2 (L118)
urine_cul (L123)
month_doe (L127)
date_doe (L128)
iuc_status (L129)
lcbi_symp (L150)
month_doe_clabsi (L153)
date_doe_clabsi (L154)

Fig 4: An example of Errors found in your Data Dictionary

SECTION (F): How to export a single, specific Form (Instrument)

If you are only intending to export a **SINGLE** specific Form from your REDCap Project, then you **CANNOT SHARE** the Data Dictionary file, as the Data Dictionary contains **ALL** of your Project's Forms and Data Variables.

To export a single Form, you will need to download the **[Instrument ZIP]** of the Form/Instrument you want to share. This can be done by going to the **[Online Designer]** section (See Fig 5).

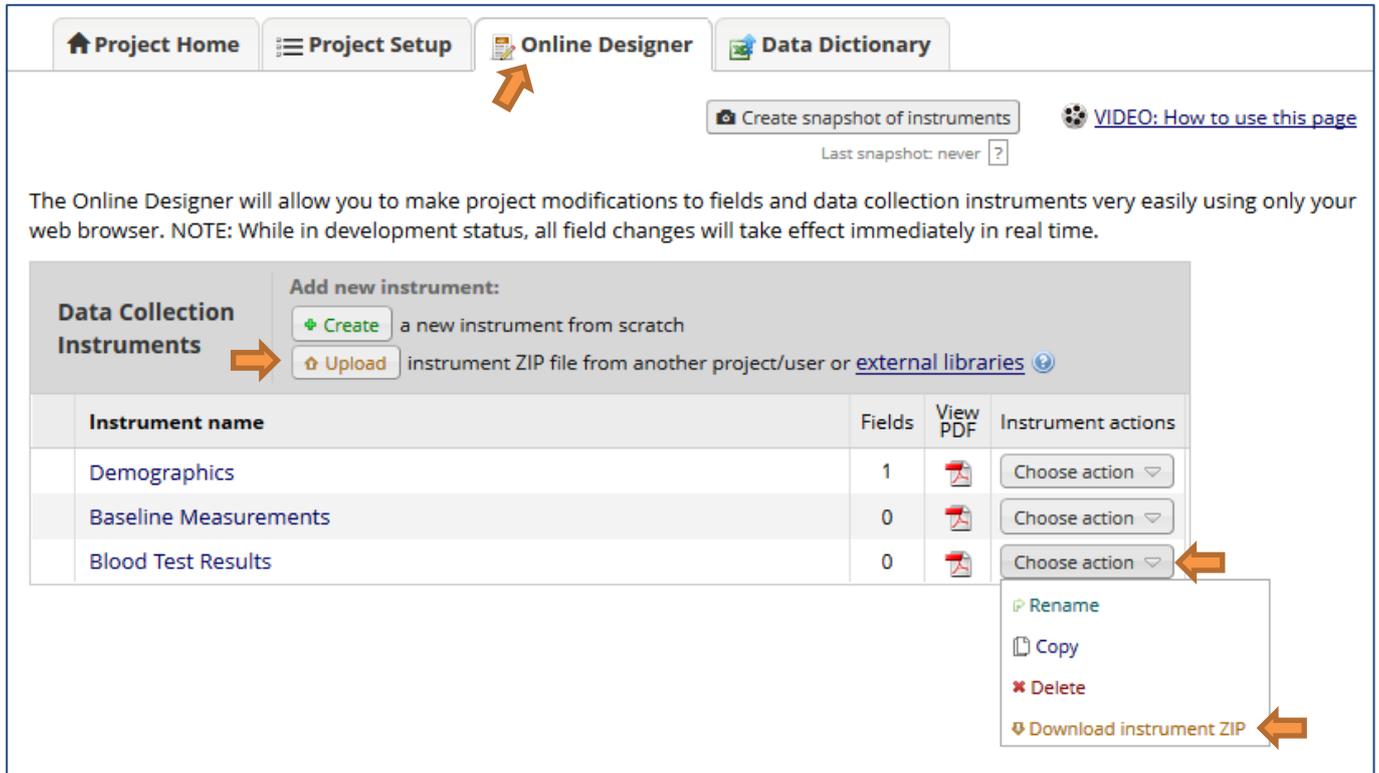


Fig 5: The [Online Designer] section

SECTION (G): Downloading a single, specific Form (Instrument ZIP)

Here are the steps to download the **[Instrument ZIP]** of a specific Form for sharing.

- (1) Go to the **[Online Designer]** section (see Fig 5).
- (2) Click on the **[Choose action]** button of the specific Form you want to share.
- (3) Click on **[Download Instrument ZIP]** from the dropdown menu, and save the resulting file to your computer.

SECTION (H): Uploading a single, specific Form (Instrument ZIP)

Here are the steps to upload the [Instrument ZIP] of a specific Form into a REDCap Project.

- (1) Go to the [Online Designer] section (see Fig 5).
- (2) Click on the [Upload] button.
- (3) Click on the [Choose File] button to locate the [Instrument ZIP] file on your computer (see Fig 6).
- (4) Once that is done, click on the [Upload Instrument ZIP] button to upload the file into the REDCap project.



Fig 6: Upload Instrument ZIP

SECTION (I): Sharing the ENTIRE REDCap Project

If you want to share the **ENTIRE** REDCap Project, you can do so by downloading the REDCap Project as a [REDCap XML file].

The XML file contains all **Forms**, **Data variables** and **Project settings** in a single file, which can be used for importing the Project to another REDCap system (or to other ODM-compatible systems).

However, do note that the XML file **DOES NOT** export the **Project Log files**, **Project Users**, **Project User-Rights** and **User-Roles** (if any).

* NOTE

- While the REDCap XML file is **fully compatible in NHG** (for both the Staging and Production Servers), the XML file can only be imported by **other** REDCap Systems which are **version 6.12.0 or higher**.
- The REDCap XML file is in **CDISC-ODM format** (ODM version 1.3.1) for ODM-compatible systems.

SECTION (J): Downloading the Project XML file

The REDCap Project's XML file can be found by going to the **[Other Functionality]** section as shown in **(Fig 7)**.

Here are the steps to download the Project XML file.

- (1) Go to: **[Project Home]** → **[Other Functionality]**

There are two options to download the XML File (see Fig 7).

- (a) **Download metadata only (XML)** ← **[RECOMMENDED OPTION]**

This option contains only the full Project setup (including all the Forms, Data Variables and Project Settings).

- (b) **Download metadata & data (XML)** ← **[NOT RECOMMENDED! DO NOT USE!]**

This option contains the full Project setup **AND ALL Project Data**.

- (2) Click on the **Download metadata only (XML)** button, and save the resulting file to your computer.

The screenshot displays the REDCap interface for a project named 'Test project for Screen-Captures'. The left sidebar shows the navigation menu with 'Project Home' and 'Project Setup' highlighted. The main content area is titled 'Other Functionality' and contains two sections: 'What is the REDCap API?' and 'Copy or Back Up the Project'. In the 'Copy or Back Up the Project' section, there are three buttons: 'Copy the project', 'Download metadata only (XML)', and 'Download metadata & data (XML)'. A green box with the text 'Use This!' points to the 'Download metadata only (XML)' button. A red box with the text 'DO NOT USE THIS! This option exports all the Collected Data in the Project as well.' points to the 'Download metadata & data (XML)' button. An orange arrow points to the 'Other Functionality' tab in the top navigation bar.

Fig 7: Project 'Other Functionality' section to download the Project XML file



IMPORTANT

- **DO NOT USE** the **second** button labelled as **[Download metadata & data (XML)]** as this option includes **ALL of the collected data** into the XML File.
- This is very risky, especially if your Project Data contains **personally-identifiable information**.
- You could **unintentionally expose identifiable information** to unauthorized parties if the wrong button was used to download the XML file.



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SECTION (K): Uploading the Project XML file as a new Project

Here are the steps to upload a Project XML file to create a new REDCap Project in your **destination REDCap system**,

- (1) Go to **[Create a new REDCap Project]** and fill in the necessary fields (see Fig 8).
- (2) Select the **[Upload a REDCap Project XML file]** option, and click on the **[Browse]** button to locate the Project XML file on your computer.
- (3) Once that is done, click on the **[Create Project]** button to create the new Project with the Project XML file.

+ Create a new REDCap Project

You may begin the creation of a new REDCap project on your own by completing the form below and clicking the Create Project button at the bottom.

Project title:
Title to be displayed on project webpage

Purpose of this project:
How will it be used?

Assign project to a Project Folder?

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

Start project from scratch or begin with a template: Create an empty project (blank slate)
 Upload a REDCap project XML file (CDISC ODM format) ?

 Use a template (choose one below)

Fig 8: Uploading the Project XML file



NOTE

- NHG Users **CANNOT CREATE NEW PROJECTS** on the **Production Server**.
- Please contact the NHG REDCap Administrator (redcap@nhg.com.sg) if you need to create a Project with an XML file for the Production Server.

Contact Us

If you have any queries, or have encountered any technical difficulties with the REDCap System, please contact us (redcap@nhg.com.sg) with your **REDCap username**, **Project Title**, and a **description of the problem** together with **screen-capture of the error message/problem** where possible.

Please provide as much information as possible about the problem (*eg: steps/actions leading to the error; the error message*) so that we can efficiently pin-point and troubleshoot the problem for you.

-- END --