


# Transfer Project

- Go to the project in the **Development/Pilot** server. Click the **Project Setup** tab, then click **Download the current Data Dictionary**



Not started

I'm done!

### Design your data collection instruments


Add or edit fields on your data collection instruments. This may be done by either using the Online Designer (online method) or by uploading a Data Dictionary (offline method). Quick links: [Download PDF of all instruments](#) Or [Download the current Data Dictionary](#)

Go to Online Designer or Data Dictionary

You may also browse for pre-built data collection instruments in the REDCap Shared Library

Have you checked the [Check For Identifiers](#) page to ensure all identifier fields have been tagged?

- If your project has any arms or events, download them from the **Define Your Events** module.



In progress

I'm done!

### Define your events and designate instruments for them

Create events for re-using data collection instruments and/or set up scheduling.

Go to Define My Events or Designate Instruments for My Events

## Arms and Events

Download the Arms and Events

Upload or download arms/events ▾
n.1 | [Delete Arm](#)

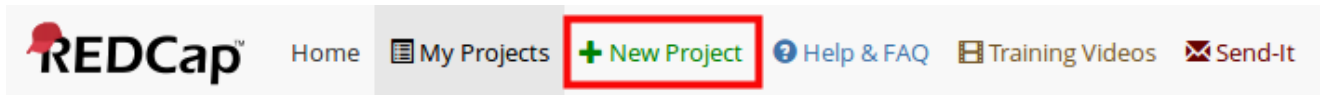
- ⬆️ Upload arms (CSV)
- ⬇️ Download arms (CSV)
- ⬆️ Upload events (CSV)
- ⬇️ Download events (CSV)

Make sure you download the Instrument mapping .csv under **Designate Instruments for My Events** tab.

Upload or download instrument mappings ▾

- ⬆️ Upload instrument-event mappings (CSV)
- ⬇️ Download instrument-event mappings (CSV)

- On the **Production/Trial** server click **New Project** and complete the blank fields. Select **Create an empty project**.



#### User Rights

Creating a **New Project** might require approval by the system administrator.

- In the **Project Setup** tab, click **Data Dictionary** and upload the .csv file you downloaded from step 2.

#### Upload your Data Dictionary file (CSV file format only)

Format for min/max validation values for date and datetime fields:

No file selected.

#### Commit Changes

Any errors will be flagged on the commit page. If the upload goes well, click **Commit Changes** to upload the file.

#### Your document was uploaded successfully and awaits your confirmation below.


- No errors or warnings were found in the document.
- The uploaded data dictionary **contains 96 fields**, which will replace the 1 fields that currently exist in the project (excluding 'Form Status' fields, which are automatically generated by REDCap).

#### Are you ready to commit the changes to the project from the uploaded Data Dictionary?

(Click the button below to submit the changes.)

[Cancel](#)

- If your project has arms or events, go to the **Project Setup** tab and enable **use longitudinal data collection with defined events**



Not started

[I'm done!](#)

### Main project settings


Use surveys in this project? [?](#)

[VIDEO: How to create and manage a survey](#)

Use longitudinal data collection with defined events? [?](#)

[Modify project title, purpose, etc.](#)

- Upload your **events** and **arms** .csv files in the **Define My Events**



In progress

[I'm done!](#)


### Define your events and designate instruments for them


Create events for re-using data collection instruments and/or set up scheduling.


Go to Define My Events or Designate Instruments for My Events


## Arms and Events


Upload the Arms and Events

 Upload or download arms/events ▾

 Upload arms (CSV)

 Download arms (CSV)


 Upload events (CSV)


 Download events (CSV)


[Rename Arm 1](#)

Custom Event Label [?](#) Unique event name [?](#)

Make sure you upload the Instrument mapping .csv under **Designate Instruments for My Events** tab.

 Upload or download instrument mappings ▾

 Upload instrument-event mappings (CSV)

 Download instrument-event mappings (CSV)

## Importing Data

If you have data to Import in to the production server make sure the project has been tested and moved to **production status** first. To learn more about **Importing Data** click [here](#)