



REDCap Project Closure and Deletion Guide

Closing a REDCap project requires careful planning to ensure that all required data, files, and regulatory documentation are retained before the project is deleted. Please note that project deletion is permanent and irreversible. Please Do not request deletion until all required materials have been exported, reviewed, and securely stored outside REDCap.

Best Practice: Do not wait until project deletion is imminent to begin downloading eConsent PDFs or uploaded files. Large file collections may take time to download.

Follow these steps to close out your project

Step 1. Export Project Data. Export the project data from

Applications → Data Exports, Reports, and Stats → Export Data

Important: Your ability to export data depends on the Data Export Rights assigned to you.

Permission	What It Includes
No Access	Data cannot be exported from the applicable form.
De-Identified	Removes fields and values that REDCap identifies as potentially identifying, based on the project's configuration.
Remove All Identifier Fields	Removes fields marked as identifiers.
Full Data Set	Includes all available fields, including identifiers and PHI, subject to your access rights.

If the Export Data button is not available, you do not have export rights for any instruments in the project. Contact a project user with appropriate rights.

If expected fields are missing from an export, check whether:

- You have export rights for the applicable instruments.
- You have Full Data Set rights where required.
- Fields were excluded based on your selected export option.

Important: REDCap can only remove information that has been appropriately identified and configured. For example, if a date of birth was not marked as an Identifier, it may remain in a de-identified export.

Best practice: Review the exported dataset before deleting the project to confirm that it contains the information you need to retain.

Step 2. Download the Project Structure. Save the project's structure before deletion. From the left-hand project menu, download:

- Codebook — a human-readable reference showing field names, labels, and attributes.
- Data Dictionary — a CSV file containing the project's metadata and structure.

The Codebook is primarily a reference document. The Data Dictionary contains metadata that can be used to recreate the project's structure. You must have the Project Design & Setup user right to access and download the Data Dictionary.

Best practice - Save both the Codebook and Data Dictionary when possible. They provide useful documentation of the project at the time it was closed.

Step 3. Download eConsent PDFs. If the project used eConsent and PDF copies were stored in REDCap, download them from:

Applications ➔ File Repository ➔ PDF Snapshot Archive: Select Download all (zip) to download the available consent PDFs.

Important: A large number of PDFs may cause the ZIP download to fail or time out. If this occurs, download the files individually or in smaller groups.

Best practice: When retention is required, save eConsent PDFs in an approved secure location as they are collected rather than relying on REDCap as the only repository until project closure.

Step 4. Download Uploaded Files. Files collected through File Upload fields are not included in a standard data export. They must be downloaded separately. The most efficient approach is to:

- Create a report that includes the applicable file upload fields.
- Open the report.
- Select Download Files (zip).

Important: Large collections of uploaded files may cause the ZIP download to fail or time out. If this occurs, download files individually or in smaller groups.

Best practice: Confirm that all required files are present and accessible before requesting project deletion.

Step 5. Export an XML Backup. If the project may need to be recreated or migrated in the future, consider exporting an XML backup. Navigate to:

Project Setup ➔ Other Functionality, under Copy or Back Up the Project, select:

- Download metadata only (XML) — exports the project structure without data.
- Download metadata & data (XML) — exports the project structure and data.

An XML backup may be useful for recreating the project on another REDCap server, preserving the project structure, and migrating the project to another compatible system.

If the XML export is too large to complete, try exporting metadata without data or reducing the amount of information included. You must have the Project Design & Setup user right to access Other Functionality.

Important: An XML export does not include: Project logging history, and Files stored in the File Repository, including eConsent PDFs

Step 6. Confirm Secure Storage. Before requesting deletion, verify that all required materials have been successfully saved outside REDCap. Project Closure Checklist:

- Project data has been exported and reviewed.
- Codebook has been saved.
- Data Dictionary has been saved, if needed.
- eConsent PDFs have been downloaded, if applicable.
- Uploaded files have been downloaded, if applicable.
- XML backup has been created, if needed.
- All required regulatory and study documentation has been retained.
- Files can be opened and accessed from their new location.
- Materials are stored in an approved, secure location.

Approved storage may include an institutional server, OneDrive, or another institutionally approved storage platform.

Important: REDCap should not be treated as the long-term archive for study data or regulatory documentation.

Best practice: Verify the archived materials before deleting the REDCap project. Once the project is deleted, the REDCap data and files cannot be recovered.

Step 7. Request Project Deletion. Complete this step only after all required data, files, and documentation have been securely archived. To delete the project, navigate:

Project Setup ➔ Other Functionality. Select:

- Delete the project — for projects in Development.
- Request delete project — for projects in Production.

When prompted, type Delete to confirm.

Please note that Development projects are deleted immediately, whereas Production projects require REDCap administrator approval before deletion is completed. You must have the Project Design & Setup user right to access Project Setup and Other Functionality.

Best practice: Do not wait until project deletion is imminent to begin downloading eConsent PDFs or uploaded files. Large file collections may take time to download.