UNIVERSITY OF ILLINOIS CHICAGO

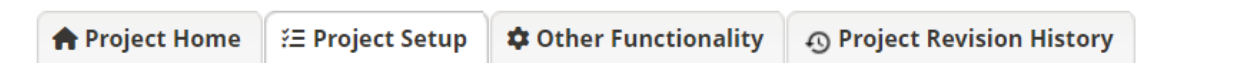# Development and Production Status

CCTS Biostatistics Core

March 2023

About Project Statuses

There are several possible statuses for your REDCap project. Each status corresponds to a project phase and determines what kinds of actions can be taken within your database. It's important to understand and use statuses appropriately to ensure valid data collection and auditing.

The current status of your project is visible at the top of the Project Setup page.

| 🏠 Project Home | ⋮☰ Project Setup | ⚙ Other Functionality | 🕘 Project Revision History |

Project status: ☑ Production   Completed steps **2** of **8**

Development Status

When a new project is created, its default status is development. When a project is in development status, you can easily add, edit, and remove data collection instruments and fields. You can also set up longitudinal data collection and events and modify other settings and configurations. Any changes to your project's structure and settings will be made in real time and may not be tracked by the REDCap logging system.

Survey links, data collection instruments, email alerts, and reports will work while a project is in development status. It is important that you thoroughly test all instruments and modules to ensure every part of your project works as expected. During the testing process, try to enter nonsensical data to test branching and validation rules.

Since all development-status changes are made in real time, it is possible to unintentionally make a change that results in data loss or corruption. Therefore, it's very important that you **do not** collect any real project data while a REDCap project is in development.

Production Status

After a project has been created and tested, the project should be moved to production status. (See below for instructions.) You should only begin to collect real project data **after** this status change has been made.

When a project is in production status, further changes are restricted to prevent unintentional data loss and to allow you full control of the live version of your project. It is still possible to edit data collection instruments and project settings, but most changes won't happen in real time and will be subject to administrator review and approval. The approval process can take up to two business days. See below for more about making changes in production status. In general:

- If changes don't cause any critical issues for existing data, they will be approved automatically.

- If changes could cause critical issues for existing data, a REDCap administrator will contact you by email to discuss and confirm revisions.

Any changes to your project in production status will be tracked on the Project Revision History page, allowing reversions to an earlier version if necessary.

The tables below list information about when major changes and revisions were made to the project. The first table below displays when the project was created, and if the project is in production, it lists the time it was moved to production, as well as any revisions made to the project fields while in production. You may also download any of the Data Dictionaries from past revisions. The table at the bottom displays general statistics with regard to the times of project changes and revisions. To perform a comparison of any revision or snapshot, click the icons/buttons on the left-hand side of the table.

Project Revision History

	Created project	02/17/2021 9:34am	-	Created by rlane7 (Rachel Lane)
	Moved to production	03/14/2023 3:14pm	Download data dictionary	Moved to production by rlane7 (Rachel Lane)
	Production revision #1 (current)	03/14/2023 3:24pm	Download data dictionary	Requested by rlane7 (Rachel Lane) Approved automatically

Project Revision Statistics

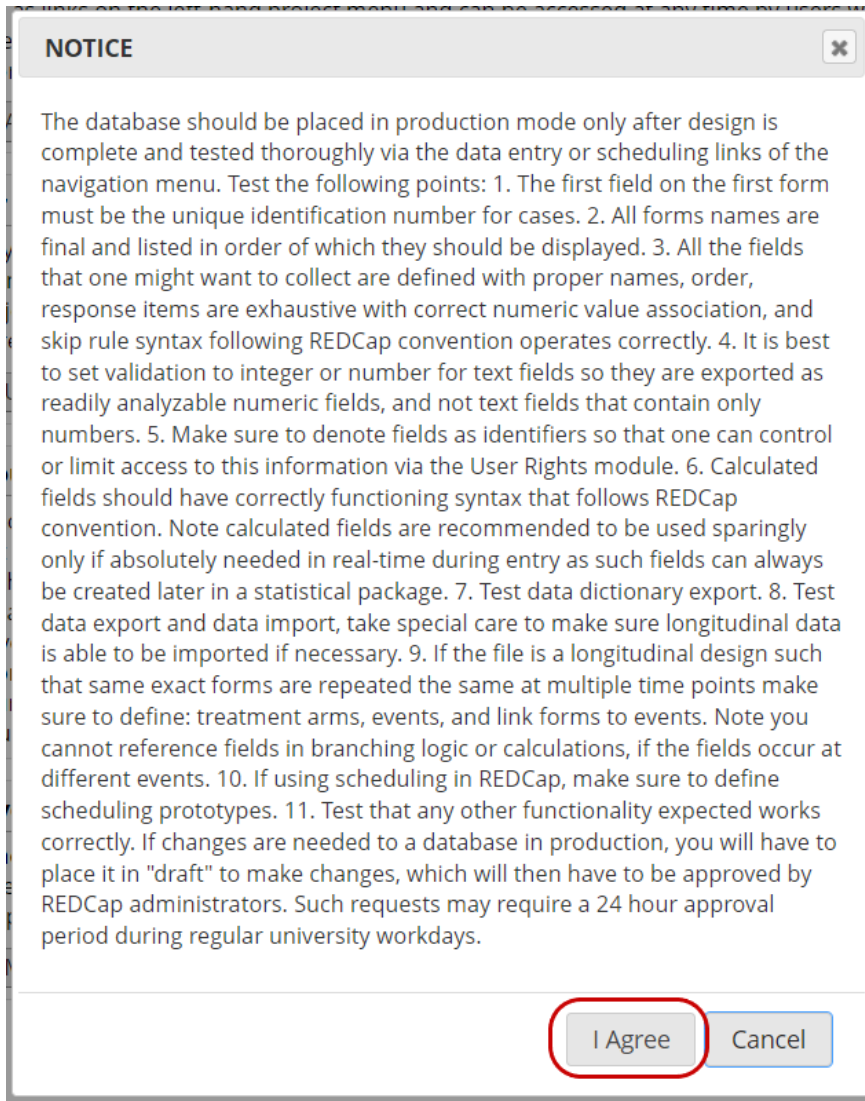|	
Time since project creation	755.2 days
Time in development	755.2 days
Time in production	0.0 days
Time since last revision	0.0 days
Average / median time between revision	0.0 days / 0.0 days

Moving to Production Status

When you are ready to move your project from development to production status, open the Project Setup page and scroll to the bottom. Click `Move project to production`.

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]

Read the pop-up window's reminders about project functionality and testing. If you are ready to proceed, click `I Agree`. To go back and continue testing, click `Cancel`.

NOTICE ✕

The database should be placed in production mode only after design is complete and tested thoroughly via the data entry or scheduling links of the navigation menu. Test the following points: 1. The first field on the first form must be the unique identification number for cases. 2. All forms names are final and listed in order of which they should be displayed. 3. All the fields that one might want to collect are defined with proper names, order, response items are exhaustive with correct numeric value association, and skip rule syntax following REDCap convention operates correctly. 4. It is best to set validation to integer or number for text fields so they are exported as readily analyzable numeric fields, and not text fields that contain only numbers. 5. Make sure to denote fields as identifiers so that one can control or limit access to this information via the User Rights module. 6. Calculated fields should have correctly functioning syntax that follows REDCap convention. Note calculated fields are recommended to be used sparingly only if absolutely needed in real-time during entry as such fields can always be created later in a statistical package. 7. Test data dictionary export. 8. Test data export and data import, take special care to make sure longitudinal data is able to be imported if necessary. 9. If the file is a longitudinal design such that same exact forms are repeated the same at multiple time points make sure to define: treatment arms, events, and link forms to events. Note you cannot reference fields in branching logic or calculations, if the fields occur at different events. 10. If using scheduling in REDCap, make sure to define scheduling prototypes. 11. Test that any other functionality expected works correctly. If changes are needed to a database in production, you will have to place it in "draft" to make changes, which will then have to be approved by REDCap administrators. Such requests may require a 24 hour approval period during regular university workdays.

I Agree   Cancel

You will have the option to retain or delete the test data you collected while in development status. Read the information in the pup-up window, select the best response, and then click YES, Move to Production Status.

You will see a green banner indicating that your project has been moved to production.

Working in Production Status

If you need to make changes to data collection instruments while in production status, follow the steps below.

Navigate to the Online Designer. Read the explanation of the procedure in the yellow box at the top of the page. If you want to proceed, click `Enter Draft Mode`.

Click on the name of the data collection instrument you want to edit. Add, edit, or delete fields as usual. Remember that changes will not be made in real time.

When you have made all needed changes, submit them to the administrator for review by clicking `Submit Changes for Review` at the top of the Online Designer page.

Read the text in the pop-up and then click `Submit`.

If your draft changes don't alter existing data, you may be notified that they were automatically approved.

If changes might alter existing data (for example, deleting a field or altering multiple-choice options when data are present), they will not be automatically approved. Instead, they will be sent to the REDCap administrator for review. You cannot enter draft mode to make further edits until the requested changes have been reviewed.

While changes are pending approval, you'll see a message at the top of the Online Designer.

The REDCap administrator will respond to your request to make changes within two business days. They may email you to ask you to visit the Project Modification Module and review all drafted changes, especially potentially critical issues. It's important that you carefully review all changes and understand the potential consequences.

Instructions:
Based on the drafted version of the project fashioned by the project users, the project fields that are to be added, delete
displayed in the table below so that all changes to the project may be scrutinized before these changes are committed p
need to determine if any problems exist in the new drafted version of the project that might need to be addressed befor
everything looks correct, and you wish to go ahead with the changes, click the Commit Changes at the bottom of the pag
changes made, click the Reject Changes button, which will place the project back in Draft Mode for the users to continue
correcting any errors.

◀ RETURN TO PREVIOUS PAGE

Details regarding all changes made in Draft Mode:
- Records in project: **1**
- Fields to be added: **0**
- Fields to be modified: **1**
- Total potentially critical issues: **1**
    - Deleted fields that contain data: **0**
    - Potentially critical issues in modified fields that contain data: **1**
- Total field count BEFORE the changes below are committed: **13**
- Total field count AFTER the changes below are committed: **13**

Fields to be ADDED: *none*

Forms to be ADDED: *none*

Fields to be DELETED: *none*

Forms to be DELETED: *none*

KEY for Comparison Table below
White cell = no change
Yellow cell = field changed (Black text = new value, Gray text = current value)
Green cell = new project field

After you review drafted changes, respond to the REDCap administrator to tell them how you want to proceed. You can choose to do one of the following:

- Commit all drafted changes
- Keep the drafted changes but return to draft mode to continue editing
- Erase all drafted changes and revert to the state before draft mode was enabled

If you choose to proceed with the changes, you will be notified when they have been approved.

Analysis/Cleanup Status

After data collection is complete, you can move the project to analysis/cleanup status. This will disable most project functionality, although all collected data will remain intact. Once in analysis/cleanup status, the project can be moved back to production status at any time.

To enter Analysis/Cleanup status, navigate to the Other Functionality tab. Click `Move to Analysis/Cleanup status`.

Completed Status

If you are finished with a project and wish to make it completely inaccessible, you may move the project to completed status. Doing so will take it offline and remove it from all users' project lists, after which it can only be seen again by clicking the `Show Completed Projects` link at the bottom of the My Projects page.

Once a project has been marked as completed, only REDCap administrators can access it and only administrators can return it to accessible state for all project users. Marking a project as Completed is typically only done when you are sure that no one needs to access the project anymore, and you want to ensure that the project and its data remain intact.

To enter completed status, navigate to the Other Functionality tab. Click `Mark project as Completed`.

Project Home **Project Setup** **Other Functionality** **Project Revision History**

Project Status Management

Development → Production (current) → Analysis/Cleanup

Move to Analysis/Cleanup status →   Move the project to Analysis/Cleanup status if data collection is complete. This will disable most project functionality, although all collected data will remain intact. Once in Analysis/Cleanup status, the project can be moved back to production status at any time.

🗑 Mark project as Completed   If you are finished with a project and wish to make it completely inaccessible, you may mark the project as 'Completed'. Doing so will take it offline and remove it from everyone's project list, after which it can only be seen again by clicking the *Show Completed Projects* link at the bottom of the *My Projects* page. Read more