


How to Move a Project into Production Status

All projects begin in Development Status and should be moved into Production Status before real data is collected. Requests to move a project into production are approved by the IHSI REDCap team.

The IHSI REDCap team does *not* review how projects are built or make changes to project builds prior to moving projects to production. Research teams are expected to have tested the design and functionality of all forms and surveys prior to requesting a project be moved into production.

To move a project into production:

1. After you have finished building your project, thoroughly test and review the project.
 - The amount of testing you need to do will depend on the complexity of your project. Some, but not all, functions to test include: branching logic, validations, piping, action tags, survey invitations, survey functionality, data export functionality, and alerts and notifications.
 - Test any surveys as if you are the worst-behaving survey participant.
 - Some, but not all, items to review include: user rights and access privileges, coding schemas, and longitudinal events.
 - Always check the following security and privacy requirements:
 - All fields that contain identifying information (e.g. any of the 18 HIPAA identifiers) are marked as identifiers. You must do this, even if your data is not regulated by HIPAA.
 - That the “Save & Return” survey feature is turned off *unless* it is a one-time, short-term survey (≤ 1 month in duration). Respondents should never be allowed to return without a return code. This policy is outlined in the [Protecting High Risk Data](#) document.
 - While changes can be made after a project is moved to production, the project should be as close to completely built as possible before active data collection begins. Some things *cannot* be changed after a project is moved to production, including moving between a classical and longitudinal project, deleting events in a longitudinal project, and changing variable names.
2. Once you are confident your project has been thoroughly tested and all items, including privacy and security settings, have been reviewed, use the “Move project to production” button at the bottom of the “Project Setup” tab to move the project into production.




Complete!

[Not complete?](#)

Test your project thoroughly

It is important to test the essential components of your project before moving it into production. Try creating a few test records and entering some data for each to ensure that your data collection instruments look and behave how you expect, especially branching logic and calculations. Then review your test data by creating reports and exporting your data to view in Excel or a statistical analysis package. If you have surveys, complete the surveys as if you were a participant by using the Public Survey Link or Participant List by sending a survey invitation to yourself. If other project modules will be used regularly, test them out a bit too. The best way to test your project is to use it as if you were entering real production data, and it is always helpful to have colleagues (especially team members) take a look at your project to get a fresh set of eyes looking at it.



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

3. A pop-up window will appear asking whether you would like to keep or delete all test data. Select your data retention preference. You **must** select an option for the survey in step 4 to submit correctly.
4. Once you submit your move to production request, you will be prompted to take a short survey to collect project information. The survey **must** be submitted to move forward with the request.
5. The IHSI REDCap team will follow up via email with any needed adjustments or questions. Requests or questions may be about:
 - Marking identifiers
 - Adjusting survey settings
 - A student's faculty or staff supervisor
 - Data retention preferences
6. The research team **must** respond to the IHSI REDCap Team via email to confirm any requested changes have been made. The REDCap software does not notify us when such changes are made.
7. A confirmation email that the project has successfully been moved to production will be sent to the *user requesting the move*. It is up to the individual user to communicate updates to their supervisor/team.

As a reminder, you will not be able to edit the project fields in real time once the project is in production. However, if necessary, edits may be made in Draft Mode (see [Making Changes in Production](#)).