

Making Changes in Production

Data collection is an iterative process, and sometimes changes need to be made to a project, whether on a questionnaire or form after data collection has already started. However, to ensure that data remains valid and no data is lost, we recommend doing several checks before making changes to an active project. The IHSI REDCap Team is not responsible for any data lost if changes are made during production.

To request changes to an in-production project, follow these steps.

1. In REDCap, select “My Projects.”
2. Select the project you want to edit.
3. Under “Project Home” select “Online Designer and Data Dictionary Upload” (found under “Quick Tasks”) or under “Project Setup” select “Online Designer.”
4. A yellow box will be at the top of the webpage that points out that this project is in production and changes will not be made in real time. This box also asks if you would like to enter Draft Mode. Select “Enter Draft Mode.”
5. Select the instrument(s) you would like to edit.
6. Make the necessary changes, heeding recommendations and cautions below.
 - a. If any point while drafting changes, you would like to look at a summary of all the changes you’ve made, you can click “View detailed summary of all drafted changes” on Online Designer.
 - b. Some tasks to do *prior* to submitting the changes for review:
 - Back up any data that has already been collected to ensure that it is not lost or altered if fields or answer choices are changing.
 - Ensure that any new fields that collect identifiers are marked as identifiable data.
 - Ensure that any new fields that need validation are validated.
 - Test any forms or surveys to be added in a separate test project to ensure the new instruments flows and works as intended.
7. Select “Submit Changes for Review.”
8. Select “Submit” on the pop-up if you would like to submit changes, or “Cancel” if you would like to go back and make additional changes or delete all changes.
9. One of the following will happen:
 - a. Changes will be automatically approved if:
 - i. The project does not have any records; or
 - ii. The project has records, but the REDCap system does not identify any critical issues that will result in data loss or affect data validity.
 - b. A yellow window will appear saying that your project is awaiting review of changes.
 - i. Note: The REDCap administrative email address is monitored on evenings and weekends only for emergencies with the system. Requests to review in-production changes will only be addressed M-F from 8 AM – 5 PM.
 - ii. If you need to review the changes you made while changes are pending, you can go to “Online Designer” and click “view a detailed summary of all drafted changes.”

10. The Illinois REDCap team will review pending draft changes for critical issues that may delete or modify existing data, such as altering coding on multiple choice and/or checkbox fields. If your changes will affect data, you will receive an email from the Illinois REDCap team with a link to the summary of the changes. This summary will highlight the critical changes and/or issues that have the potential to affect existing data.
 - a. If you approve of the changes, respond to the email confirming that you approve of the changes.
 - b. If you do not approve of the changes and want to make additional edits before the project is updated, respond to the email requesting that the project be moved back into draft mode.
 - c. If you no longer want to make any changes, request that the project be reset and all drafted changes deleted.
11. You will receive an email notifying you of one of the above actions being taken by a REDCap administrator.
 - a. If you will continue to draft changes, return to Step 1 and repeat the process as necessary.

We recommend never doing the following when making changes to in production project:

- **Deleting fields.** If there is a question you do not want future users to answer, we recommend using the “@HIDDEN” action tag in the “Action Tags/Field Annotation” section instead. This will hide the question from survey takers or data entry personnel but will not delete the question from the project.
- **Deleting answer choices.** If you would like to remove an answer, we recommend using the “@HIDECHOICE” action tag in the “Action Tags/Field Annotation” section instead. To use this action tag, enter “@HIDECHOICE=#” where ‘#’ is the number of the option you would like to hide. For instance, if you are requesting people select a day to schedule a study session, and the options are:
 - 1, Monday
 - 2, Tuesday
 - 3, Thursdaybut Monday is full, you would enter “@HIDECHOICE=‘1’” in the “Action Tags/Field Annotation” section. This would hide “Monday” as an option for anyone else who accessed the survey.
- **Changing the coding of answer choices** such as:
 - Reverse-coding a question that was not previously reverse-coded.
 - Adding additional options in the middle of a categorical variable, rather than at the end.

Tips

- The codebook can be a useful tool for viewing all variables, field labels, and field attributes (field type, validation, choices, calculations, etc.) when making changes.
- If more elaborate or extensive changes need to be made, the project can be copied without data so changes can be thoroughly tested before being made to the active project. Real data should not be collected in a copied project. Once it’s served its purpose, it should be deleted.