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 Illinois REDCap Team is not responsible for any data loss if changes are made during production.

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

1. In the project you want to edit, select “Designer” from the left-hand menu or “Online Designer” on the “Project Setup” page.
2. 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.”
3. Make the necessary changes to the instruments you want to edit, heeding the recommendations and cautions below.
   a. Here are some recommended tasks to do prior to submitting the changes for review:
      i. In a separate copy of the project, test any forms or surveys being added in a to ensure the new instruments flow and work as intended before implementing them in your production project.
      ii. 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.
      iii. Ensure that any new fields that collect identifiers are marked as identifiable data.
      iv. Ensure that any new fields that need validation are validated (e.g. validating email addresses as “email”).
   b. If at 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.
      i. This page will also tell you:
         1. If any of the proposed changes are considered “critical” and,
         2. If REDCap will automatically approve the changes or if the changes will need to be approved by a REDCap administrator.
4. Select “Submit Changes for Review.”
5. 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 remove all drafted changes.
6. 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: Requests to review in-production changes will only be addressed M-F from 8 AM – 5 PM. The REDCap administrative email address is monitored in the evenings and during weekends only for emergencies with the system.

7. 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 affect data, the Illinois REDCap team will email you a link to the summary of the changes for your review and ask how you would like to proceed. This summary will highlight the critical changes and/or issues that have the potential to affect existing data.

8. The email will give you three options as listed below. Respond to the Illinois REDCap team with your preference, as no further action will be taken with your request until we hear from you or someone in your research team.
   a. Commit the changes – This will accept the changes and any data loss or modification that comes with them
   b. Reject changes – This will keep any changes you have already made but put the project back into draft mode so more changes can be made, if necessary.
   c. Remove all drafted changes – This will erase any submitted changes and put the project back into Production Mode.
      i. Note: The Illinois REDCap team is always happy to work with you to ensure you can make the necessary changes while also protecting existing data.

9. You will receive an email notifying you of one of the above actions being taken by a REDCap administrator as per your request. After that:
   a. If you wish to continue to draft changes, return to Step 1 and repeat the process as necessary.
   b. If your changes are approved and include adding a new instrument to the project, REDCap defaults to assigning the new instrument’s “Data Viewing Rights” to “View & Edit” and “Data Export Rights” to “Full Data Set” for all users in the project. A REDCap user in the project with the ability to modify user rights will need to edit the user rights for all individuals or on all user roles, as needed, for each new instrument.

We recommend never doing the following when making changes to the 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 or any existing data 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, Thursday
but 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 accesses 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.

Other Tips:
- The Codebook is a useful tool for viewing all variables, field labels, and field attributes (field type, validation, choices, calculations, etc.) when making changes. You can access the Codebook through the “Codebook” link in the left-hand menu.

- 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 in the active project. To copy a project, go to “Project Home” and find the “Other Functionality” tab, then select “Copy the Project” under “Copy or Back Up the Project”. **Real data should never be collected in a copied project.** Once it’s served its purpose, the copy project should be deleted.