

# Modifying a Project in Production

**\*\*\*Warning: Altering a database that is in Production can cause data loss\*\*\***

When a project is moved to production, the expectation is that the project's data collection plan has been finalized. This means that how data will be collected in the project (i.e. the data collection workflow), and what data will be collected in the project (i.e. forms and/or surveys), has been vetted, tested and validated to meet the requirements of the data collection plan and approved IRB protocol. As such, once a project has started collecting real data, minimizing change is important for both the reliability and dependability of the data, and the reliability and dependability of the how the project is set up to meet the requirements of the data management plan. Nevertheless, we understand that data collection is an iterative process, and sometimes changes need to be made to a project after data collection has already begun.

The PI (and/or their designated project team) is responsible for managing such production changes. You need to ensure that project changes are within the scope of the data collection plan described in approved protocol, and/or consult with the IRB to determine if additional regulatory approval is needed before the changes can be implemented. Changes should first be conceptualize to better understand what needs to be done. You should evaluate the impact of form or survey changes on the data that's already been collected, the data collection workflow and the functionality that facilitates it, and the components of peripheral features the project team relies on for managing data collection. Lastly, you will need to validate that changes were implemented correctly and evaluate the outcome of the changes had the intended effect.

When you are ready to make changes to your project in production, it is important to note, that changes cannot be made in real-time as it is in the development system. In production, many aspects of how a project is set up to collect data are locked down or restricted, and a review process is imposed on modifications to forms and surveys. The REDCap software is designed this way as a guardrail to try to prevent users from making changes to their project that would have a detrimental impact such as creating a data loss or data corruption issue, invalidating functionality critical for data collection, and/or causing components of peripheral features the project team relies on for managing data collection to fail. The development system does NOT have these protections.

Therefore modifications to a project should be done via DRAFT MODE in the production project. When making changes via Draft Mode, there is a built-in safeguard against unintentional data loss (as previously noted above). This can ensure that users don't change fields mid-study (either accidentally or intentionally) that might potentially change the validity of the data or analysis, and will keep track of any changes that are made. For more information regarding common project changes and their potential impact, see the Common Project Changes section & Table 1.

While testing changes in the development system prior to them taking effect in production is not required, it is strongly recommended. Testing your changes is often the most effective way to determine the impact of your changes and to validate that your changes will have their intended effect. It is the only way to determine if it looks and behaves as intended, and allows you to review how the data collected would export, and/or see how components of peripheral functionality, like reports or data quality rules operate. Testing first is an especially good idea for changes that involve using advanced features, such as piping, action tags, field embedding, smart variables, or special functions, as well as using REDCap syntax to create compound logic statements for piping, branching logic or calculated fields. Even when the changes do not involve how the production project is set up to collect data, making changes to components of peripheral functionality designed to help manage data collection, such as creating new reports or data quality rules, can undermine the project team's efforts to use the test project to assess the impact of their changes. Thus, it is always best practice that any and all production changes be tested in the development system before they are submitted in the production system (see Step 5, on page 12)

Testing data should include different scenarios. Some things to look for when testing for all possible responses that affect the logic:

- Branching logic – Ensure your branching logic is functioning properly.
- Calculated fields – Ensure your calculated fields are computing correctly
- Surveys and ASIs - Ensure surveys can be accessed and distributed correctly, and ASIs are configured properly. These may have to be manually re-setup to be tested.
- Data Exports – Export your test data to ensure you are comfortable with how it is formatted before you begin collecting real data

Third Party Input – Get a third party to enter data as well. Someone who was not involved in building the database will find errors that may otherwise be missed

**\*\* Please Note: Testing in DEV will NOT show the potential critical issues involving changes field types of choice labels thus it is imperative that you thoroughly review this guide!**

After changes are made a "summary of changes" page will be available, displaying a preview of all the fields that are added, removed, and/or modified. Any potentially critical issues will be flagged, drawing attention to changes that could result in data corruption or deletion. **It is strongly recommended that you review this summary prior to submission as it is the responsibility of the PI (and/or designated project team) to verify the impact of such changes.** Changes will NOT be tested by the REDCap Administrator.

Once you are ready to submit your changes for approval, click 'Submit Changes for Review'. The REDCap Administrator will automatically get notified. If changes are not considered 'higher-risk', then REDCap Administrator will process the request as is, and you will receive an email confirmation when those changes have taken effect.

If any critical issues are flagged, you will receive an email from the Administrator to confirm that you want to commit to the changes. Again, these critical issues can be reviewed in the "summary of changes". You can confirm these changes as is, or request to keep the drafted changes made thus far, but place it back in Draft Mode for users to make more changes, or request to erase all the drafted changes made, and revert back to before Draft Mode was enabled.

Upon approval, data dictionary snapshots are automatically created with each revision. They are archived, tracked, and can be compared with other revisions in a detailed view via the 'Project Revision History' tab. It is **strongly recommended** that each data dictionary snapshots also be saved externally. These snapshots can be useful to allow you to revert all your fields back to a specific point in time, if desired, by taking the snapshot from the Revision History page and uploading it on the Data Dictionary Upload page. Additionally, whenever data dictionaries are uploaded into the project (even via API metadata import), a snapshot of the current data dictionary is taken before committing the new data dictionary. This allows you to remain worry-free that your fields/forms will be preserved automatically, even in the case of an accident occurring (e.g., wrong data dictionary was uploaded). The production's data dictionary can also be uploaded to the development project so they can in sync with one another.

## Common Project Changes

### ***Adding New Survey***

It is the responsibility of the PI (or their designated project team) to evaluate the impact of adding new surveys on: 1) the data that's already been collected, 2) the data collection workflow, including how the project is set up to send out surveys and collect responses, 3) the existing functionality that was tested and vetted during the development phase that impacts or is related to sending out surveys and collecting responses, and 4) the components of peripheral features the project team relies on for managing sending out surveys and collecting responses. You need to determine if how your participants will access the new survey involve or require any of the following:

- Adding a new invitation
- Adding a new connection that has conditions
- Both existing participants and new participants to complete it

If any of above listed items are true, make sure to first create test records in the test project, completing any existing surveys that may impact how the new survey will be distributed. Expect extra effort if you are adding a new distribution method that was never set up and tested when the project was in development.

### ***Changing Events***

It is the responsibility of the PI (or their designated project team) to: 1) identify any potential barriers to making the event changes, 2) uncover the potential of the event changes to have a negative impact on data that's already been collected or the project's existing setup, and 3) make a pre-determination about the kind of help that will be needed to both test the event changes in a test copy of the project and then implement the changes in the production project. Typically, the biggest risks in making changes to events involve the following:

- Removing an event or removing a form from an event, which will orphan off data that's already been collected and create a data loss
- Renaming an event or editing an existing form to event assignment in order to move a form from one event to another event, which will cause any dependent logic statements or syntactical references that invoke the event name in calculated fields, piping, branching logic, report filters, automated survey invitations, survey queue connections, etc., to fail

For these types for changes we recommend the following alternate solutions:

- Instead of removing an event, we recommend using the Form Display Logic tool to create conditional logic to disable data entry access to the forms assigned to the event you want to remove
- Instead of editing an existing form to event assignment in order to move a form from one event to another event, use the Form Display Logic tool to create conditional logic to disable data entry access to the form at the event you want to move the form from
- Instead of renaming an event, create a Custom Event Label to add a short helpful note or alternate name that will be meaningful to other users on the project
- For projects using surveys, making any changes to events heightens the risk of having a negative impact on the project and/or creating complexity that would require additional help because:
  - There are likely dependencies on features that are related to sending out surveys and collecting responses, such as Automated Survey Invitations, Survey Settings or the Survey Queue, all of which have their own learning curves
  - There is often a different effect of the changes on existing participants versus new participants that has to be accounted for

### ***Adding New or Modifying Automated Survey Invitations, the Survey Queue, or Survey Settings***

REDCap allows any user who has permissions enabled for both Project Design and Setup user rights and Survey Distribution user rights to add new configurations or make modifications to existing configurations related to Automated Survey Invitations (ASIs), the Survey Queue or a form's existing Survey Settings without oversight. This means that these features are **NOT** locked down in such a way and users are not forced to enter Draft mode to make changes and submit them for approval. As such, the only guardrail built into the system to try to prevent users from making the kinds of changes related to ASIs, the Queue, or Survey Settings, which risk having a negative impact on the project, is secondhand, via the careful application of User Rights/accessibility privileges.

It is the responsibility of the responsibility of the PI (or their designated project team) to evaluate the impact of their changes related to ASIs, the Survey Queue or Survey Settings on: 1) the data that's already been collected, 2) the data collection workflow, including how the project is set up to send out surveys and collect responses, 3) the existing functionality that was tested and vetted during the development phase that impacts or is related to sending out surveys and collecting responses, and 4) the components of peripheral features the project team relies on for managing sending out surveys and collecting responses. Testing changes related to Automated Survey Invitations, the Queue or Survey Settings in the development project is strongly recommended. Some potential issues that may arise include:

- A change that causes a feature to fail in such a way that participants will not be able to complete their surveys - such as condition/logic error
- Modifications of queue logic so a batch of surveys are no longer connected to each other, and after a participant completes the first survey in the batch, they cannot access any of the other surveys.
- A user makes a change to a feature that creates a regulatory issue that has to be reported, such as:
  - A new ASI is added that sends survey invitations to participants who did not consent.
  - Survey Settings are changed to enable Save and Return without a code on a survey that captures PHI, allowing anyone with access to the survey link to return to the survey and view all the information the participant already entered.

### ***Enabling/Disabling Main Project Settings or Optional Modules***

Most of the features that are foundational to how a project is set up to collect and store data, and that are grouped together in the Project Setup tab, are locked down in production. This includes:

- Main Project Settings
- Using longitudinal data collection with defined events
- Using surveys
- Optional Modules
- Repeating forms or events
- Auto-numbering for records
- Scheduling module
- Randomization module
- Twilio, MyCap

The ramifications of disabling or deactivating a main setting or optional module are typically far reaching and/or profound, and as a general rule is **NOT recommended**. However, it is the responsibility of the PI (or their designated project team) to evaluate the impact of their changes that are related to deleting fields, forms, events or disabling a main project setting or optional module on: 1) the data that's already been collected, 2) the data collection workflow and the functionality that facilitates it, and 3) the components of peripheral features the project team relies on for managing data collection.

Below are some additional recommended guidelines and steps to follow when making changes to a production project:

- Do **NOT** delete 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.
- Do **NOT** change existing variable names (e.g. demo\_date, labs\_calcium, survey\_firstname). Changing the variable name will delete all the data that was previously collected for that variable. To restore data that has been lost in this way, revert to the previous/original variable name(s).
- Do **NOT** change existing form names (e.g. Demographics, Labs, Survey) via a data dictionary upload or form completeness data will be lost. Form names may be changed within the Online Designer without data loss.
- Do NOT change 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.
- Do **NOT** change field types to any other type of field will result in a loss of your existing data in those field
- Do **NOT** delete 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, Wednesday

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 accessed the survey.

- Do **NOT** modify the codes (numbers before the answer choices) and/or answer choices for existing Multiple Choice – Drop-down List (Only One Answer), Multiple Choice – Radio Buttons (Only One Answer), or Checkboxes (Check All That Apply) fields or existing data will be lost and/or disassociated.

<u>Example:</u> (old values)	(new/changed values)
1, Married	1, Married
2, Single	2, Single
3, Divorce	3, Separated
4, Separated	4, Divorce

Because the new value of “Divorced” is now ‘4,’ any previous subject data that was entered as “4, Separated” will now be given the value of “4, Divorced” because REDCap only looks at the codes (1, 2, 3, 4, etc.) and not the answers after the codes.

Example: (changing from a Yes – No field type to a Multiple Choice – Drop-down list (Only One Answer) or Multiple Choice – Radio Buttons (Only One Answer) field type)

(old values:)	(new/changed values)
0, No	2, No
1, Yes	77, NA

Because the new value of “No” is now ‘2,’ any previous “0, No” answers will now be disassociated because “0, No” no longer exists (see example above). To retain the data for the subject’s with “No” as the answer to this question/variable, one has to recode “No” as ‘0.’ Or, for each subject that had “No” as the answer, one has to re-enter the data for each of these subjects. Those with “Yes” answers do not need to be re-entered.

It is only acceptable to **add choices** (answers) to Multiple Choice – Drop-down List (Only One Answer), Multiple Choice – Radio Buttons (Only One Answer), or Checkboxes (Check All That Apply) field

- New fields held in draft mode **CANNOT** be embedded elsewhere on the form or survey to which the new fields are being. To embed new fields, first add new fields to a form or survey and submit the changes, and then, go back into Draft Mode and apply field embedding. Do **NOT** drag and drop a new instrument into first position record\_id – or change or move this variable name - doing so will delete all of the data in your project.
- The record\_id field should always be the first field of your first instrument in the project, because the record\_id field is what REDCap uses to link together all the data in a particular record. If you drag and drop a new instrument into the first position in the list, it can move this all-important record\_id field and delete all your data.
  - When you create a new project, the record\_id is the first field in the default “Form 1” that comes with every new project. If you wish, you can rename the record\_id variable name (to something such as study\_id or participant\_id) as soon as you create the project. But once you start entering data, changing the variable name of the record\_id field will delete all of the data in your project, because you’ve essentially deleted the key that allows REDCap to understand where the data belongs.

Additional types of changes and its associated data impact are detailed in Table 1.

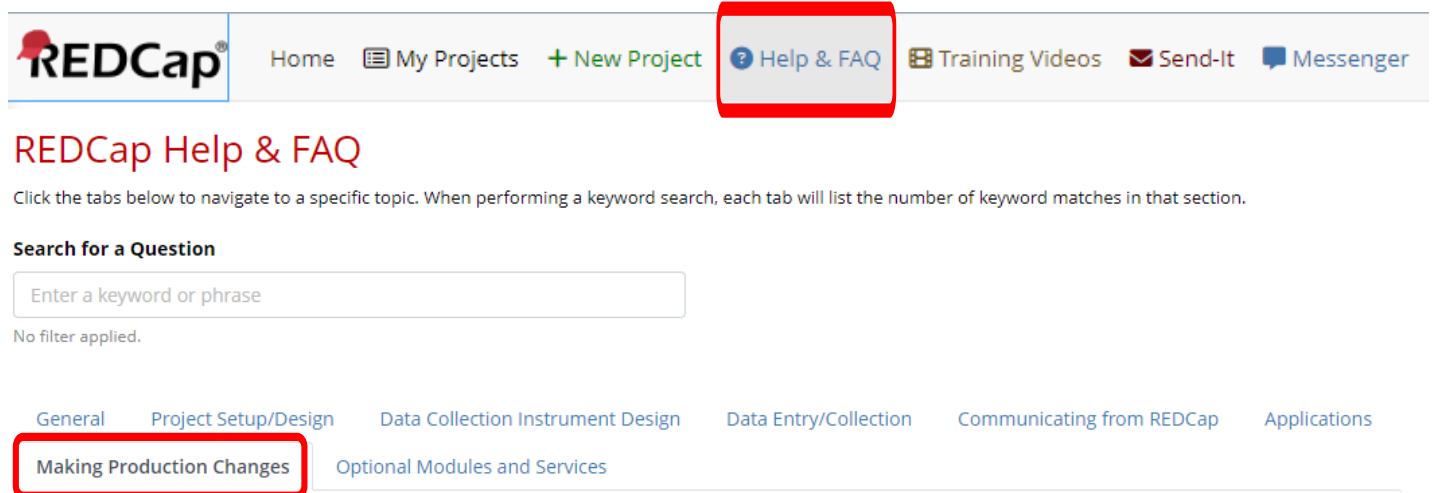
**Table 1.**

<b>Metadata</b>	<b>Change Type</b>	<b>Data Impact</b>
Variable / Field Name	Add new	No data impact. New field will be added to all records.
Variable / Field Name	Delete	<b>Possible data loss.</b> Deletes the field and ALL the data entered for that field
Variable / Field Name	Rename	<b>Possible data loss.</b> REDCap views this action as the equivalent to deleting a variable and adding a new variable. Data is deleted
Form Name Note: “back end” Form name (data dictionary ex: "baseline_data") does not appear on screen “front end” form label displays on screen (ex: "Baseline Data")	Add new form	No data impact. New form/fields will be added to all records.
Form Name	Rename form	<b>Possible data loss.</b> The data dictionary renames the form name. All form status values (unverified, complete) for ALL records will be reset to “Incomplete”. The Online Form Editor will NOT change the form name and only renames the form label, preserving the form status for all records.
Field Units	Add, Modify, Delete	Changes field unit label. Label is not displayed on form.
Section Header	Add, Modify, Delete	Not directly associated to any data collection variable. Descriptive text.
Field Type	Modify	<b>Possible data loss.</b> Depending on the change, data can be deleted. Examples of changes that can be made without data loss: Radio buttons to drop downs; Drop downs to Radio buttons Examples of changes that can be made with data loss: Radio buttons to check boxes; Text box to calculated field
Field Label	Modify	<b>Possible label mismatch.</b> Change to question caption may change the meaning of data previously entered (ex: changing "happy" to "unhappy"). Examples of changes that do not require confirmation: Spelling corrections, Format changes

<b>Metadata</b>	<b>Change Type</b>	<b>Data Impact</b>
Choices (codes)	Add	No data impact. New choice will be added to all records.
Choices (codes)	Delete	<b>Possible data loss.</b> Deletes the choice and ALL data entered as that choice
Choices (codes)	Recode	<b>Possible label mismatch.</b> Codes are not automatically remapped to new codes. Data entered remains the same in the database. Relabeling codes may change the meaning of data entered.
Calculations	Modify, Delete	Forms with saved calculated field values will <b>NOT</b> automatically recalculate when changes are committed. Values should be derived and confirmed in analysis. And all forms with values should be resaved to update stored values.
Field Note	Add, Modify, Delete	No direct data impact. Descriptive text.
Text Validation Type	Add, Modify	<b>Possible data loss.</b> Data entered as free text or other type of validation text, may no longer be valid
Text Validation Type	Delete	Field becomes open text field.
Text Validation Min/Max	Add, Modify, Delete	No data impact since out of range data can still be saved.
Identifier? (mark as)	Add, Delete	No direct data impact.
Branching Logic	Add, Modify	<b>Possible data loss.</b> Fields that will be now be hidden due to updated logic that already contains data will prompt to erase data.
Branching Logic	Delete	No direct data impact (may impact missing data analysis). Fields will always be visible
Required Field (mark as)	Add, Delete	No data impact since data can still be saved without completion of required fields.



For further assistance, please make sure to check the [REDCap Help & FAQ](#) section located at the top of the Main REDCap page:



The screenshot shows the top navigation bar of the REDCap website. The 'Help & FAQ' link is highlighted with a red box. Below the navigation bar, the 'REDCap Help & FAQ' section is displayed. A search bar is present with the placeholder text 'Enter a keyword or phrase'. Below the search bar, the text 'No filter applied.' is shown. A horizontal menu of navigation tabs is displayed, with 'Making Production Changes' highlighted by a red box. Other tabs include 'General', 'Project Setup/Design', 'Data Collection Instrument Design', 'Data Entry/Collection', 'Communicating from REDCap', and 'Applications'. The 'Optional Modules and Services' link is also visible below the main tabs.

\*\* If changes need to be made to your eConsent, please review the [eConsent Versioning Guide](#) for further guidance.

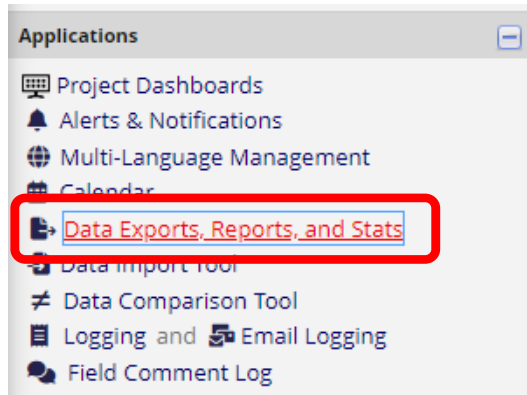
Additional free training materials and resources:

- [REDCap Training Videos](#)
- [UCH REDCap webpage](#)

# Steps for Making Changes to a Project in Production

1. Make a copy of the project's existing data. This can be done via **Data Exports, Reports, and Stats**. File will automatically be saved to your download folder - save to an appropriate location, do not change file type.

Click [HERE](#) for tutorial on how to use Data Exports, Reports, and Stats .



## Data Exports, Reports, and Stats

+ Create New Report | My Reports & Exports | Other Export Options

This module allows you to easily view reports of your data, inspect plots and descriptive statistics Excel, SAS, Stata, R, or SPSS for analysis (if you have such privileges). If you wish to export your \*e the best and quickest way. However, if you want to view or export data from only specific instrunr choice. You may also create your own custom reports below (if you have such privileges) in which events using a vast array of filtering tools to make sure you get the exact data you want. Once yo export it out of REDCap in a specified format (Excel, SAS, Stata, SPSS, R), or view the plots and des

My Reports & Exports	
Report name	View/Export Options
A All data (all records and fields)	<a href="#">View Report</a> <a href="#">Export Data</a> <a href="#">Stats</a>
B Selected instruments (all records)	<a href="#">Make custom selections</a>
<a href="#">+ Create New Report</a>	

2. Go to the **Project Setup** page and **Download the Current Data Dictionary**. File will automatically be saved to your download folder - save to an appropriate location.

Project Home | **Project Setup** | Other Functionality | Project Revision History | [Edit project settings](#)

Project status:  Production Completed steps 2 of 7

**Main project settings**

Complete!

Disable  Use surveys in this project? [?](#) [VIDEO: How to create and manage a survey](#)

Enable  Use longitudinal data collection with defined events? [?](#)

Enable  Use the MyCap participant-facing mobile app? [Learn more about MyCap](#)

[Modify project title, purpose, etc.](#)

**Design your data collection instruments & enable your surveys**

In progress


[I'm done!](#)

Add or edit fields on your data collection instruments (survey and forms). This may be done by either using the Online Designer (online method) or by uploading a Data Dictionary (offline method). You may then enable your instruments to be used as surveys in the Online Designer. Quick links: [Download PDF of all instruments](#) OR [Download the current Data Dictionary](#)

Go to [Online Designer](#) or [Data Dictionary](#)

Learn how to use [Smart Variables](#) [Piping](#) [@ Action Tags](#) [Field Embedding](#) [Special Functions](#)

3. Click on 'Online Designer'





**Complete!**

[Not complete?](#)

### Design your data collection instruments & enable your surveys

Add or edit fields on your data collection instruments (survey and forms). This may be done by either using the Online Designer (online method) or by uploading a Data Dictionary (offline method). You may then enable your instruments to be used as surveys in the Online Designer.

Quick links: [Download PDF of all instruments](#) OR [Download the current Data Dictionary](#)

Go to  **Online Designer** or  **Data Dictionary**

Learn how to use [Smart Variables](#) [Piping](#) [@ Action Tags](#)

The system will navigate the user to the Online Designer tab. Click on 'Enter Draft Mode'


[Project Home](#) [Project Setup](#) **[Online Designer](#)** [Data Dictionary](#)

**NOTE:** The project is currently in PRODUCTION status, and thus changes cannot be made in real time to the project as when in Development status. However, changes to the project may be drafted in DRAFT MODE, after which such changes will be reviewed and approved by a REDCap administrator. Once those changes are approved, you will then receive an email confirmation informing you that those changes have taken effect on your production project.

Would you like to enter DRAFT MODE to begin drafting changes to the project?

**Enter Draft Mode**

The system will provide a green Success notification that you have entered the Draft Mode.

 **Success!**




The project is now in Draft Mode. When you have finished making changes to your instruments, click the 'Submit Changes for Review' button so that your changes may be approved.








4. Make changes to the Forms/Instruments by hovering over the Form/Instrument and clicking on the pencil icon. Or if you need to add new instrument/s, select the appropriate option under 'Add New Instrument'

**Data Collection Instruments**

Survey options: [Survey Queue](#) [Survey Login](#) [Survey Notifications](#)

**Add new instrument:**

-  **Create** a new instrument from scratch
-  **Import** a new instrument from the official [REDCap Shared Library](#)
-  **Upload** instrument ZIP file from another project/user or [external libraries](#)

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
<b>Demographics</b> 	5			Choose action	<a href="#">Survey settings</a> <a href="#">+ Automated Invitations</a>
Daily Diaries	3			Choose action	<a href="#">Survey settings</a> <a href="#">+ Automated Invitations</a>
Treatment Survey	1			Choose action	<a href="#">Survey settings</a> <a href="#">+ Automated Invitations</a>

5. If you decide to test the changes prior to them taking effect, you need to go to the **Project Setup** page and **Download Data Dictionary with drafted changes**. File will automatically be save to your download folder - save to an appropriate location, do not change file type.

The screenshot shows the Project Setup page for a project in Production status. The navigation bar includes Project Home, Project Setup (highlighted with a red box), Other Functionality, Project Revision History, and Edit project settings. The Project status is Production, and it shows Completed steps 2 of 7. The main project settings section includes a 'Complete!' indicator and options for 'Use surveys in this project?' (checked) and 'Use longitudinal data collection with defined events?' (unchecked). A link for 'Download Data Dictionary with drafted changes' is highlighted with a red box. The 'Design your data collection instruments & enable your surveys' section is in progress and includes a link for 'Download Data Dictionary with drafted changes' (highlighted with a red box) and buttons for 'Online Designer' and 'Data Dictionary'.

Then, you will need to upload the **Data Dictionary with drafted changes** to the **development** project.

Go to the **DEVELOPMENT** project. Go to the **Project Setup** page and click on **Data Dictionary**.

The screenshot shows the Project Setup page for a project in Development status. The navigation bar includes Project Home, Project Setup (highlighted with a red box), Other Functionality, Project Revision History, and Edit project settings. The Project status is Development, and it shows Completed steps 0 of 7. The main project settings section includes a 'Not started' indicator and options for 'Use surveys in this project?' (checked), 'Use longitudinal data collection with defined events?' (unchecked), and 'Use the MyCap participant-facing mobile app?' (unchecked). The 'Design your data collection instruments & enable your surveys' section is not started and includes a link for 'Download PDF of all instruments' OR 'Download the current Data Dictionary'. The 'Data Dictionary' button is highlighted with a red box.

In the **DEVELOPMENT** project : Upload your Data Dictionary file: first choose the file, then select upload.

**Upload your Data Dictionary file** (CSV file format only)

Format for min/max validation values for date and datetime fields:

Choose the delimiter for the uploaded file:

No file chosen

A brief summary and any applicable warnings will be displayed for your review. Once you are ready to commit the changes to the development project, click '**Commit Changes**' or you can cancel and the project will revert back unchanged. **\*\* Please Note: Testing in DEV will NOT show the potential critical issues involving changes field types of choice labels thus it is imperative that you thoroughly review this guide!**

[Project Home](#) | [Project Setup](#) | [Online Designer](#) | **[Data Dictionary](#)** | [Codebook](#)

[VIDEO: How to use this page](#)

**✔ Your document was uploaded successfully and awaits your confirmation below.**

- You are now required to review any warnings below and then click the button at the bottom of the page to officially commit the field changes to the project. Follow the instructions below.
- The uploaded data dictionary **contains 69 fields**, which will replace the 19 fields that currently exist in the project (excluding 'Form Status' fields, which are automatically generated by REDCap).

**Allowable warnings found in your Data Dictionary:**

Variables/field names are recommended to be less than 26 characters in length. You may want to shorten the following variable names:  
**treatment\_and\_assignment1\_1 (A15)**

**Are you ready to commit the changes to the project from the uploaded Data Dictionary?**  
(Click the button below to submit the changes.)

The system will provide a green Success notification indicating that the upload has been committed.

**✔ Changes Made Successfully!**

The field changes included in the uploaded Data Dictionary have been committed.

You are now ready to test the changes in the development system. As a reminder NO real data can be entered.

6. Once all of the changes have been completed and you are satisfied with your production project, go back to the Online Designer page **in your PRODUCTION project**. You can view all of your changes before you submit them via '[View detailed summary of all drafted changes](#)'

If you want to remove the changes you made, click on '[Remove all drafted changes](#)'

Since this project is currently in PRODUCTION, changes will not be made in real time. [Tell me more](#)

[Submit Changes for Review](#) Fields to be added: 0 / Total resulting field count: 12  
Fields to be deleted: 0 / Existing field count: 12

[Remove all drafted changes](#) [View detailed summary of all drafted changes](#)

**Instructions:**

Based on the drafted version of the project fashioned by the project users, the project fields that are to be added, deleted, or modified are displayed in the table below so that all changes to the project may be scrutinized before these changes are committed permanently. You will need to determine if any problems exist in the new drafted version of the project that might need to be addressed before proceeding. If everything looks go, and you wish to go ahead with the changes, click the Commit Changes at the bottom of the page. To reject the changes made, click the Reject Changes button, which will place the project back in Draft Mode for the users to continue modifying or correcting any errors.

**Details regarding all changes made in Draft Mode:**

- Records in project: **3**
- Fields to be added: **0**
- Fields to be modified: **1**
- Total potentially critical issues: **2**
  - Deleted fields that contain data: **2**
  - Potentially critical issues in modified fields that contain data: **0**
- Total field count BEFORE the changes below are committed: **126**
- Total field count AFTER the changes below are committed: **115**

Fields to be ADDED: none

Forms to be ADDED: none

**Fields to be DELETED:**

- email "Medication"
- gym "Gym (Weight Training)"
- aerobics "Aerobics"
- eat "Eat Out (Dinner/Lunch)"
- drink "Drink (Alcoholic Beverages)"
- specify\_mood "Specify the patient's mood"
- meds "Is patient taking any of the following medications? (check all that apply)"
- cirr\_etiology "Cirrhosis Etiology" (1 records affected)
- cirr\_etiology\_other "Specify other"
- gender "Gender"
- test\_complete "Complete?" (1 records affected)

**Forms to be DELETED:**

- test "Test"

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

7. If you are satisfied with your changes, click on '[Submit Changes for Review](#)' for approval. This will automatically email the UCH REDCap Administrator and notify them that project changes have been requested.

Since this project is currently in PRODUCTION, changes will not be made in real time. [Tell me more](#)

[Submit Changes for Review](#) Fields to be added: 0 / Total resulting field count: 12  
Fields to be deleted: 0 / Existing field count: 12

[Remove all drafted changes](#) [View detailed summary of all drafted changes](#)

The REDCap Team will process your request. If no potentially critical issues are found, your changes will be approved. If potentially critical issues are flagged, then you will be notified to review and confirm the requested changes. You will be notified by email when your changes have been committed to the project.

8. After your changes have taken effect, you should download a new copy of the Data Dictionary and upload it to your project in development, so that your development project is a mirror copy of your production project (if it not so already and/or if you chose not to test your changes). You should also save the file externally.

**\*If a user creates a new instrument while a project is in production, all users in the project will have 'No Access' rights to the new instrument(s) by default.**