



REDCap: Project Statuses and Project Life Cycle

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Development

All projects are in **Development** status when first created. In Development, you can design, build, and test your REDCap projects. Changes are implemented in real-time and do not require review. In Development mode, you can adjust any part of the structure of your project, including arms, longitudinal events, and instruments assigned to events.













Real data should not be entered into projects in Development mode! You should thoroughly test your project in Development by entering test or practice data. Avoid entering real data into a Development project. Data entry, surveys, calculations, and exports will be fully functional while your project is in Development, to allow you to fully test the project setup. Because changes are made in real-time, it is possible to easily corrupt or delete data in a project in Development. Additionally, snapshots of the project data dictionary are not logged automatically before and after making a change to the project setup.

Once you have set and thoroughly tested your project, you will want to move it into [Production](#) status before you begin to collect data. See [REDCap: How to Move Your Project to Production](#) for directions on how to move your project into Production status.

UCH REDCap administrators will periodically review projects that are in Development status and contact those with over 30 records to verify that the project is NOT collecting real data. Real data MUST only be collected in the Production system.

UCH REDCap administrators will also periodically review projects that have had no activity for 6+ months. These development projects should be deleted.

Differences between Development and Production Status in REDCap:

Development vs Production Features		
Feature	Development	Production
Survey and Data Entry Features Function:		
"Real" data can be entered:		
Changes can be made to the project:		
Changes that may cause unintentional data loss or data corruption are reviewed by an administrator:		
Snapshots of data dictionary are logged before and after a change:		
Changes require entering Draft Mode:		

Production

Moving your project to **Production** ensures you're maintaining data accuracy and integrity. The Production change control process provides an additional check to ensure that data that has already been collected is not deleted, re-coded or overwritten unintentionally.

All survey and data entry features and functions will be exactly the same as they are in Development, with the exception of certain Project Setup features. UCH REDCap allows users with Project Design and Setup rights to modify and create fields and instruments in Production. However, changes involving the creation or modification of events in a longitudinal project, or the assignment of instruments to an event *must be made by a REDCap administrator*.

The 'move project to production' button can be found in the Project Setup tab.

The screenshot shows the REDCap Project Setup interface. At the top, there are navigation tabs: 'Project Home', 'Project Setup' (highlighted with a red box), 'Other Functionality', 'Project Revision History', and 'Edit project settings'. Below the tabs, the project status is 'Development' and 'Completed steps 0 of 7'. The main content area is divided into three sections, each with a 'Not started' indicator (a red 'X' in a box):

- Main project settings:** Includes options to 'Disable' or 'Enable' 'Use surveys in this project?' (currently enabled) and 'Use longitudinal data collection with defined events?' (currently disabled). There is also a link to a video: 'VIDEO: How to create and manage a survey' and a button 'I'm done!'.
- Design your data collection instruments & enable your surveys:** Includes instructions on adding or editing fields on data collection instruments.
- Move your project to production status:** Includes instructions on moving the project to production status. A red box highlights the 'Move project to production' button.

Under Project Setup select "Move project to production"

To make changes to a project in Production status, you must first enter [Draft Mode](#) and then submit the changes to a REDCap administrator for review before they are implemented. In Production status, REDCap automatically logs copies of the data dictionary before and after you make changes to the project.

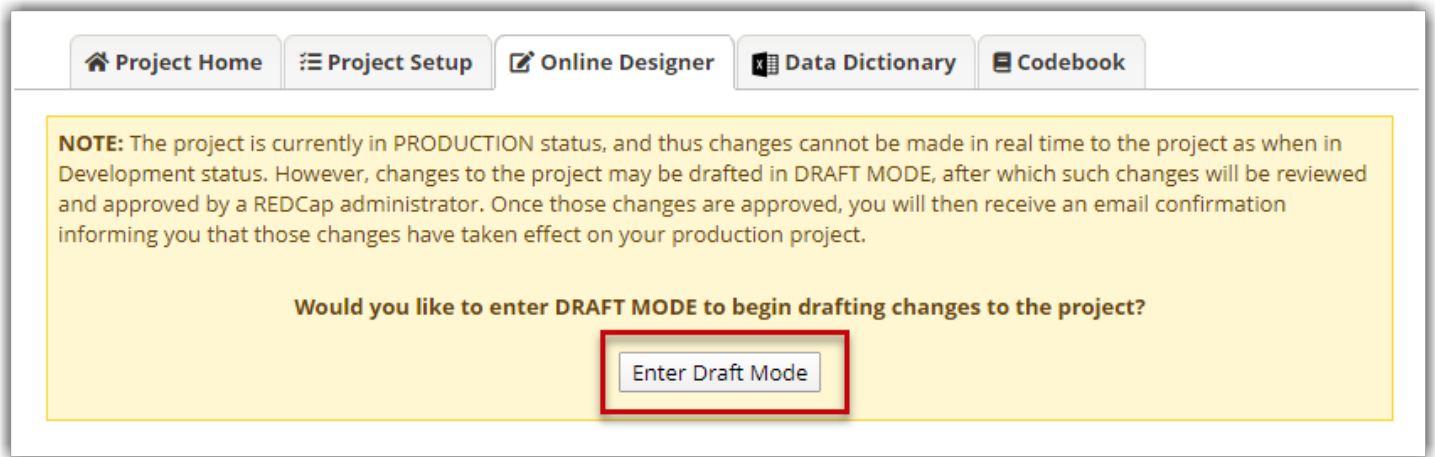
UCH REDCap cannot be used for project and/or data storage. Once active data collection has ended, the project must be removed from the system. UCH REDCap administrators will periodically review projects that have had no activity for 6+ months.

Draft Mode

While not an official status in REDCap, **Draft Mode** allows you to make changes to a Production project in UCH REDCap. When you want to make changes to a Production project, you will first need to enter Draft Mode. You will then be able to make changes as you would have in Development mode. When you have made all of the changes you would like, you will submit the changes for review to a REDCap administrator. We will review that your changes do not corrupt or delete existing data in your project, that identifiers are appropriately marked, and ensure that all mobile users have synced the project before the change is put into effect.

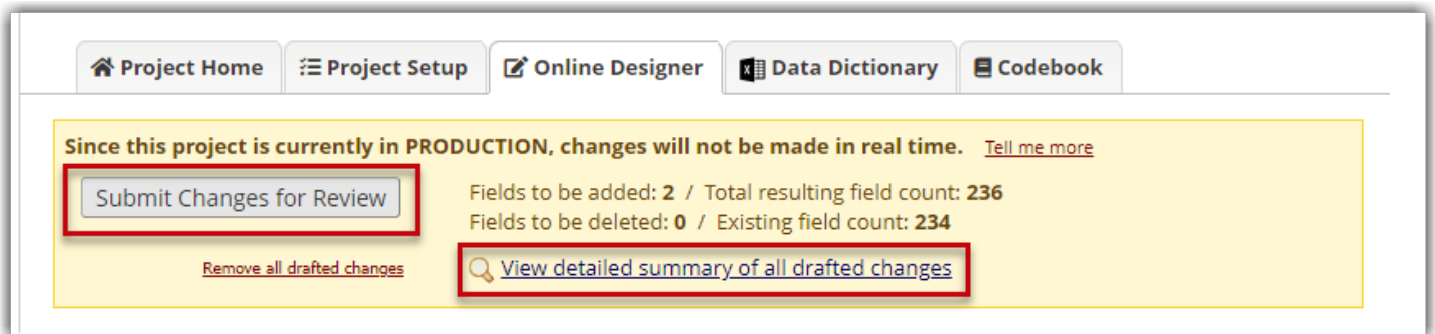
A REDCap administrator will review your drafted changes. If there are changes that may negatively impact your existing data, we will confirm the impact of the changes before they are committed to the project. While your project is in Draft Mode and your drafted changes are under review, your (unchanged) project remains live and data collection can continue.

Entering Draft Mode: When you access the Online Designer for a project in Production, REDCap will ask you to enter draft mode before you will be able to make any changes:



Select "Enter Draft Mode"

Once you have made all of the change you would like to submit, you can review your drafted changes or click the button to submit them:




Once changes have been made, review your changes with "View detailed summary of all drafted changes, then submit the changes for review.

If you are making extensive changes, or changes that may impact your data, it is helpful to review the changes before submitting them. Reviewing the REDCap summary of drafted changes will tell you if there are any changes that will potentially negatively impact your data. This is the same tool a REDCap administrator will use to determine if your changes are okay to commit. Look to see if REDCap has flagged any "Potentially Critical Issues".

Generic Example Project

[RETURN TO PREVIOUS PAGE](#)

Details regarding all changes made in Draft Mode:

- Records in project: 1
- Fields to be added: 2
- Fields to be modified: 3
- Total potentially critical issues: 0 
 - Deleted fields that contain data: 0
 - Potentially critical issues in modified fields that contain data: 0
- Total field count BEFORE the changes below are committed: 234
- Total field count AFTER the changes below are committed: 236
- Will these changes be automatically approved? **No, an admin will have to review these changes.** ([Administrators: Change how this works](#))

Fields to be ADDED:

- new_field ""
- new_field2 ""

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

Check for any potentially critical issues before submitting your changes for review

Once approved, your changes will be implemented and you will exit Draft Mode. Continue using Draft Mode throughout your project when changes are needed.

Analysis/Cleanup

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.

When a project is in Analysis/Cleanup, it is assumed that formal data collection has ended, except for cleaning and analyzing the data already collected. Many features are disabled, such as surveys, Alerts & Notifications, Automated Survey Invitations, and other features typically used during data collection. Also, no new records can be created while in this status.

You can move your project to Analysis/Cleanup status under the 'Other Functionality' tab.

NOTE: Projects in Development cannot be moved to Analysis/Cleanup since there should be no need to clean or analyze the test data that was entered. Their next status in the life cycle is to delete them from the system.

Project Home Project Setup **Other Functionality** Project Revision History Edit project settings

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.

← Move back to Development status Moved to production too soon? You may move the project back to development status, if needed. **(Administrators Only)**

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](#)

After project completion, move your project to Analysis/Cleanup status

Modify data locking mode

While the project is in Analysis/Cleanup status, you may set the data in the project to be either:

- 1) Editable (existing records only), or
- 2) Read-only/Locked. If set to Read-only/Locked mode, then no data in the project will be able to be modified in any way.

ⓘ This project is currently in **Analysis/Cleanup status**, so it is assumed that formal data collection has ended, except for cleaning and analyzing the data already collected. While in this status, many features are disabled, such as surveys, Alerts & Notifications, Automated Survey Invitations, and other features typically used during data collection. Also, no new records can be created while in this status. [Are you done cleaning and analyzing your data?](#)

The data in this project is currently: Editable (existing records only)

Project Status Management

Development → Production → Analysis/Cleanup (current)

Move the project to production status so that real data may be collected.

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](#)

Modify data locking mode?

While the project is in Analysis/Cleanup status, you may set the data in the project to be either 1) Editable (existing records only), or 2) Read-only/Locked. If set to Read-only/Locked mode, then no data in the project will be able to be modified in any way.

When in Analysis/Cleanup there is an option to allow editing or to lock all records from being edited

Complete

Given the UCH REDCap **cannot** be used for project and/or data storage, once data collection has ended, and the files exported, please do **NOT** mark the project complete – instead, the project should be deleted from the system.

Deleting a Project

When you no longer need the project, it should be deleted. Deleting a project will permanently remove it from REDCap, along with any data collected in the project.

To delete a project, go to the "Other Functionality" tab and scroll down to the "Request delete Project" button. If needed, you can cancel your request quickly if you mistakenly selected this button.

Data Management

You may completely remove this project, in which all its data will be permanently deleted also.

Data Management

Request pending

You may completely remove this project, in which all its data will be permanently deleted also.