



REDCap Project Edits in Production

When making changes to a project in **Production** using **Draft Mode**, certain updates must be reviewed and approved by a REDCap administrator. This review process helps protect your existing data and ensures that changes do not unintentionally compromise data integrity.

Administrator review is typically required for changes that may:

- Delete existing data
- Alter the meaning or interpretation of collected data
- Modify identifier settings (for example, failing to mark fields as identifiers)

If a REDCap administrator determines that your drafted changes could adversely affect your data, they will contact you to confirm your intent before committing the changes to Production.

Before submitting your changes for review, please select **“View detailed summary of all drafted changes”** on the Draft Mode screen. This summary allows you to review every modification you have made. Any items displayed in **red** should be examined especially carefully prior to submission.

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: **274**
Fields to be deleted: **0** / Existing field count: **274**

[Remove all drafted changes](#)

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

Select "View detailed summary of all drafted changes" to review your current changes

Changing Labels

Each field you create in REDCap includes both a **field label** and a **unique variable name**. Once a project is in **Production**, variable names can **no longer be changed**. While field labels *can* be updated, doing so may unintentionally change the meaning or interpretation of the data already collected for that field.

For example, changing a field label from **“days”** to **“weeks”** can be problematic. Any data that was originally entered to represent days would now appear to represent weeks, fundamentally altering the meaning of the existing data.

Additionally, because the variable name cannot be updated after Production, it would continue to reflect **“days.”** This mismatch between the variable name and the field label can cause confusion—particularly during data review, analysis, or export.

For these reasons, field label changes in Production should be carefully reviewed to ensure they do not alter the intended meaning of previously collected data.

Field Type: Text Box (Short Text, Number, Date/Time, ...)

Field Label ☐ Use the Rich Text Editor ?

How many days have you taken your medication?

Variable Name (utilized in logic, calcs, and exports)
 meds_days ☐ Enable auto naming of variable based upon its Field Label?
ONLY letters, numbers, and underscores

How to use Smart Variables Piping Field Embedding

Validation? (optional) Number
 Minimum:
 Maximum:

Field Type: Text Box (Short Text, Number, Date/Time, ...)

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How to use Smart Variables Piping Field Embedding

Validation? (optional) Number
 Minimum:
 Maximum:

Changing the Field Label may alter the meaning of the data.
 Variable Name cannot be changed after the project is in Production

Recommended Change:

If your field contains data, you may want to create an entirely new field instead to capture the new data and then use the [@HIDDEN action tag](#) to hide the field you will no longer be using. This allows the field and data to remain in your project for reports & exports, but you will no longer see it on data entry pages.

If your field does not contain data and the variable name still makes sense, changing the field label can be acceptable.

Deleting Fields

When a field is no longer needed within your project, you have the option to delete that field. However, when data has already been entered into that field, deleting it would result in data loss.

In this example, the field 'First Name' has been deleted. In reviewing the summary of all drafted changes, you can see that this will affect 6 records.

[RETURN TO PREVIOUS PAGE](#)

Details regarding all changes made in Draft Mode:

- Records in project: 7
- Fields to be added: 1
- Fields to be modified: 1
- Total potentially critical issues: 1
 - Deleted fields that contain data: 1
 - Potentially critical issues in modified fields that contain data: 0
- Total field count BEFORE the changes below are committed: 274
- Total field count AFTER the changes below are committed: 274
- Will these changes be automatically approved? **No, an admin will have to review these changes.** ([Administrators: Change how this works](#))

Fields to be ADDED:

- address "Address"

Forms to be ADDED: none

Fields to be DELETED:

- f_name "First Name" (6 records/events affected)

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

Deleting a field that contains data will also delete the data causing data loss

Recommended Change:

If your field contains data, you may want to instead use the [@HIDDEN action tag](#) to hide the field you will no longer be using. This allows the field and data to remain in your project for reports & exports, but you will no longer see it on data entry pages.

- To 'undo' the field deletion, you will need to re-create that field. Your project codebook (found under the Project Home and Design section) will list all fields in your project - including the one you had planned to delete. You can re-enter a new field and use the same variable name you previously had.
- The other option is to use the 'Remove all drafted changes' link found in the online designer - draft mode area (yellow section). This will remove ALL planned changes. There is no way to accept some changes, but not others.

If your field does not contain data, deleting the field can be acceptable.

Adding New Forms or Fields

Adding New Forms

When a new instrument is added and the project is in production, all users will automatically receive "No Access" - Data Export Rights and "No Access (Hidden)" - Data Viewing Rights. Users with the high-level access of 'User Rights' will need to update the access for all project users or user roles who should have view/and or export access to the instrument once the project changes have been committed.

Note: When adding a new data collection instrument to a project, if the project is in development status, all users will automatically receive "Full Data Set" Data Export Rights and "View & Edit" Data Viewing Rights for that new instrument.

For more information on this, please see our [REDCap: Granting User Access to New Instruments](#) guide.

Adding New Fields

In most cases, adding a new field will not require approval from a REDCap administrator. However, any field that the REDCap system believes could be an identifier will require REDCap administrator review before committing the change. For a refresher on what could be considered an identifier, check out [Identifiers in REDCap](#). To view potential identifiers in your project, there is a link within the Project Setup > Design your data collection instruments & enable your surveys:

The screenshot shows the REDCap Project Setup interface. At the top, there are tabs for 'Project Home', 'Project Setup', 'Other Functionality', and 'Project Revision History'. Below the tabs, the 'Project status' is 'Production' (indicated by a green checkmark), and 'Completed steps 2 of 8' are shown. The 'Main project settings' section is marked 'Complete!' and contains options to 'Use surveys in this project?' and 'Use longitudinal data collection with defined events?'. The 'Design your data collection instruments & enable your surveys' section is marked 'In progress' and contains instructions on how to add or edit fields. A red arrow points to the 'Check For Identifiers' link in the text: 'Have you checked the [Check For Identifiers](#) page to ensure all identifier fields have been tagged?'. Below this, there are links for 'Smart Variables', 'Piping', '@ Action Tags', 'Field Embedding', and 'Special Functions'.

Use the "Check For Identifiers" tool to mark new fields as identifiers when needed

Option List Changes

There are several changes that can be made to an option list (radio or checkbox fields), but changing a coded value or renaming an option can lead to data loss or data integrity issues.

Users can assign each option in a list a unique coded value (number or letter), similar to a variable name for the overall field. However, REDCap does allow users to change that coded value which can lead to data issues. When a coded value is changed, any previous data that selected that option is no longer correct.

In this example, the options have been changed so that they would appear alphabetical with "Other" as the last option. In doing this, several records would be adversely affected.

- 'Vanilla' (1) selections would now mean 'Chocolate' (1) & 'Chocolate' (2) selections would become 'Cookie Dough' (2), etc. since the coded value has changed.
- 'Mint' (3) & 'Other' (5) selections would be deleted.

Choices (one choice per line) [Copy existing choices](#)

1, Vanilla
2, Chocolate
3, Mint
4, Cookie Dough
5, Other



Choices (one choice per line) [Copy existing choices](#)

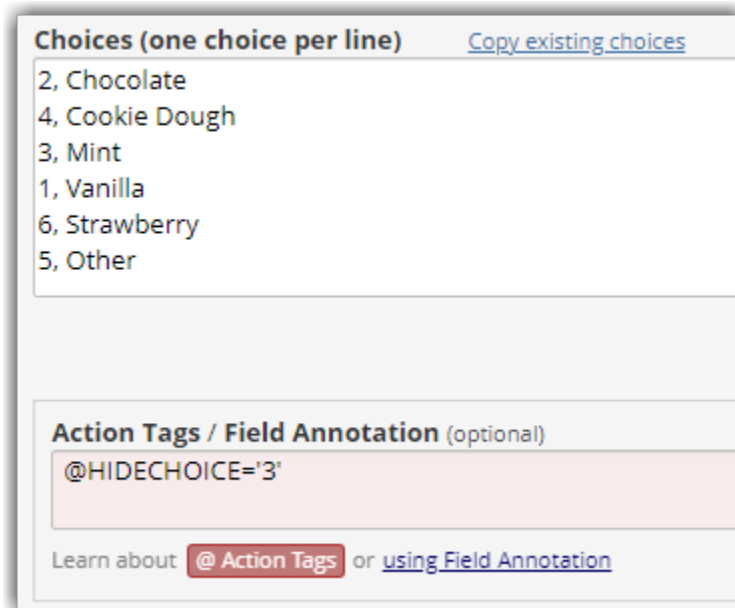
1, Chocolate
2, Cookie Dough
3, Mint
4, Vanilla
5, Other

Choices Change Summary ✕					
The table below lists the values and labels of each choice for this multiple choice field, displaying which choices have been added, deleted, or remain unchanged in Draft Mode. Also, the column on the far right displays how many records have a saved value for the given choice.					
Existing Value	Existing Label	Draft Value	Draft Label	Status	Number of records having this value
1	Vanilla	1	Chocolate	Altered	2
2	Chocolate	2	Cookie Dough	Altered	1
3	Mint	-	-	Removed	1
4	Cookie Dough	4	Vanilla	Altered	1
5	Other	-	-	Removed	1
-	-	99	Other	Added	-

Changing coded value or label of an option choice could result in data loss or data integrity issues

Recommended Change:

The options will be listed in the order that they appear when building the field. The number or letter of the coded value doesn't affect the order. To change the order of an option list, just move the label AND option code to a new position. You can also add new options wherever you'd like - just assign it a new coded value. To remove an option that you no longer need, we recommend using the action tag [@HIDECHOICE](#).



Choices (one choice per line) [Copy existing choices](#)

2, Chocolate
4, Cookie Dough
3, Mint
1, Vanilla
6, Strawberry
5, Other

Action Tags / Field Annotation (optional)

@HIDECHOICE='3'

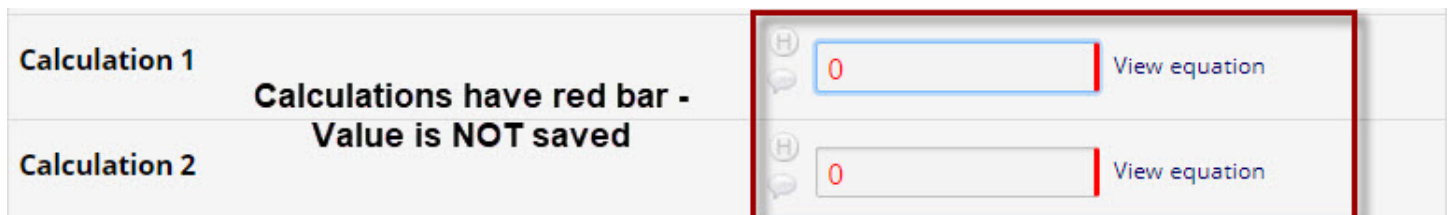
Learn about [@ Action Tags](#) or [using Field Annotation](#)

Use the @HIDECHOICE action tag to remove a choice that is no longer needed

Adding or Changing Calculations

Adding or changing calculations in a Production project requires extra steps to update and save the values of the calculated fields. These values are not updated automatically when the change is approved.

When a calculation field is added or updated in a Production project, the calculations will run, and the new values will appear within a form. However, those values are **NOT SAVED** yet. This is indicated in a data entry instrument by red vertical line in the field.



Calculation 1 Calculations have red bar - Value is NOT saved

Calculation 2

0 View equation

0 View equation

A red bar next to a calculated field's value means the current displayed value HAS NOT been saved

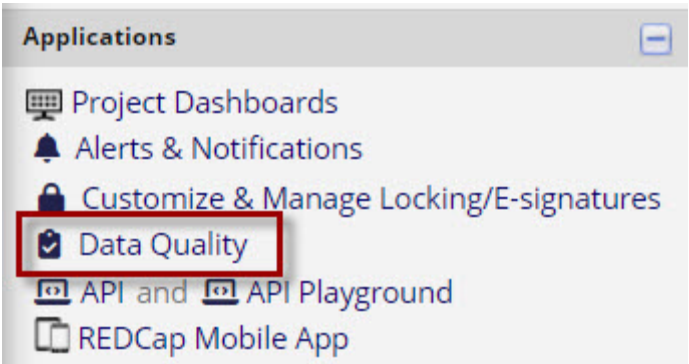
Since values are not automatically saved with this update, those values will NOT appear within reports or data export until they are saved.

Options to Update Calculations:

There are two options to save values in a new or updated calculation field.

1. Navigate to the record and form the calculation is on, and then save the form.
 - The red vertical line will disappear, indicating the value was saved.

- This would need to be done for EACH record and can be time-consuming if you have several records and fields to update.
2. Run Data Quality - Rule H to update several records and calculated values at the same time (*more information below*)
- It is recommended to run this rule after any new or updated calculated fields are added to a project



Access Data Quality from the left-side applications menu

Data Quality - Rule H

On the Data Quality page, selecting "Execute" on Rule H will tell you how many calculations need to be updated. You can select "view" to show a list of all 'Incorrect values for calculated fields', which includes fields where a value could be currently blank, but should have a value.

Data Quality Rules					
Processing Complete! Execute rules: All All except A&B Clear					
Apply to: All records All data access groups					
Rule #	Rule Name	Rule Logic (Show discrepancy only if...)	Real-time execution ?	Total Discrepancies	
A	Blank values*	-		Execute	
B	Blank values* (required fields only)	-		Execute	
C	Field validation errors (incorrect data type)	-		Execute	
D	Field validation errors (out of range)	-		Execute	
E	Outliers for numerical fields (numbers, integers, sliders, calc fields)**	-		Execute	
F	Hidden fields that contain values***	-		Execute	
G	Multiple choice fields with invalid values	-		Execute	
H	Incorrect values for calculated fields	-		220	export view
I	Fields containing "missing data codes"	-		Execute	

Select "Execute" on Rule #H to view total number of incorrect calculated values

After reviewing the records and fields that will be updated, you can press 'Fix calcs now'. This will save EVERY listed field to the new value shown.

Rule: **Incorrect values for calculated fields**
Discrepancies found: **220**
Export results (CSV)
✕

⚠ Fix ALL incorrect calculated values?
Fix calcs now

Record (Sorted by DAG)	Discrepant fields with their values	Status	Exclude ?
001 Baseline (Arm 1: Adult)	adult_survey_sum = [no data] (Calculated value should be "0")	Incorrect value	exclude
001 Baseline (Arm 1: Adult)	pediatric_survey_sum = [no data] (Calculated value should be "0")	Incorrect value	exclude
002 Baseline (Arm 1: Adult)	adult_survey_sum = [no data] (Calculated value should be "0")	Incorrect value	exclude
002 Baseline (Arm 1: Adult)	pediatric_survey_sum = [no data] (Calculated value should be "0")	Incorrect value	exclude
003 Baseline (Arm 1: Adult)	adult_survey_sum = [no data] (Calculated value should be "0")	Incorrect value	exclude

Select "Fix calcs now" button to update all incorrect calculations in project

WARNING: Pressing the "Fix calcs now" button will update **ALL** of the values listed.

Carefully review the list of new values to ensure you want all fields to be updated. It is recommended to run this rule after any new or updated calculated fields are added to a project so that this list remains short. If you wish not to update a field, you can press the 'exclude' button. This exclusion will remain until someone removes it.

002 Baseline (Arm 1: Adult)	adult_survey_sum = [no data] (Calculated value should be "0")	Incorrect value	exclude
002 Baseline (Arm 1: Adult)	pediatric_survey_sum = [no data] (Calculated value should be "0")	Incorrect value	exclude
003 Baseline (Arm 1: Adult)	adult_survey_sum = [no data] (Calculated value should be "0")	Incorrect value	exclude

Select "exclude" for any fields that should NOT be updated

Data Quality Rule H will work for both numerical calculation fields and for fields using calculation [Action Tags](#) such as @CALCTEXT or @CALCDATE

Changing Field Type

Changing a field type that already has data in it can be problematic. Some field types require data to be collected in a specific way - like an option list retains the coded value of an option (not the label), and a text field captures anything that is entered. It is recommended that field types only be changed in no data has been entered into them.

Types of Changes and their Impacts on Data



= Changes should not affect data



= Changes will affect data



= Change may affect data

	Text	Notes	Calculation	Multiple Choice (Radio or Dropdown)	Checkboxes	Yes – No	True - False
Initial Field Type	Text	✓	✗	✗	✗	✗	✗
	Notes	✓	✗	✗	✗	✗	✗
	Calculation	✗	✗	✗	✗	✗	✗
	Multiple Choice (Radio or Dropdown)	!	✗		✓	!	!
	Checkboxes	!	✗	✗		!	!
	Yes - No (coded 1, 0)	!	✗	!	!		✓
	True - False (coded 1, 0)	!	✗	!	!	✓	

Making Changes using the Data Dictionary

Project changes can also be made using the Data Dictionary. The Data Dictionary is a specifically formatted CSV file that allows you to construct your project fields and, afterward, upload the file to apply the changes to your project. The current Data Dictionary can be downloaded and modified to change, delete, or add fields.

During Development, these changes will be applied automatically, but once your project is in Production, the changes will appear as Draft changes that will need to be submitted and reviewed before they become available.

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

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

This module may be used for making changes to the project, such as adding new fields or modifying existing fields, by using an offline method called the Data Dictionary. The Data Dictionary is a specifically formatted CSV file within which you may construct your project fields and afterward upload the file here to commit the changes to your project.

Click the 'Browse' or 'Choose File' button below to select the file on your computer, and upload it by clicking the 'Upload File' button. Once your file has been uploaded, changes will NOT immediately be made but will be displayed and checked for errors to ensure that all the formatting in your Data Dictionary is correct before official changes are made to the project. **Snapshot note:** A snapshot of your project's current Data Dictionary will be created automatically during the Data Dictionary upload process before committing the new Data Dictionary. The snapshot can later be accessed and downloaded from the Project Revision History page.

Need some help?
If you wish to view an example of how your Data Dictionary may be formatted, you may download the [Data Dictionary demonstration file](#), or you may view the [Data Dictionary Tutorial Video \(10 min\)](#). For help setting up your Data Dictionary, you may also see the instructions listed on the [Help & FAQ](#).

Steps for making project changes:

- 1.) [Download the current Data Dictionary](#)  – Also download with other delimiters: [Comma \(,\)](#), [Tab](#), [Semicolon \(;\)](#)
- 2.) Edit the Data Dictionary (see the [Help & FAQ](#) for help)
- 3.) Upload the Data Dictionary using the form below
- 4.) The changes will be made to the project after the Data Dictionary has been checked for errors

Upload your Data Dictionary file (CSV file format only)

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

CSV delimiter of data file:

No file chosen

Data Dictionary Page and Upload Options

Precautions when using the Data Dictionary for Project Changes

- The Data Dictionary is a copy of ALL fields within the project. Uploading a copy of the Data Dictionary that does not include all instruments or fields will result in those fields being removed from the project
- Changing instrument names using the Data Dictionary in longitudinal projects may result in data being orphaned or lost in the project. **Renaming instruments should only be done using the built-in REDCap renaming tool found in the Online Designer.**