



REDCap: Moving Your Project to Production

The UCH REDCap system consists of TWO separate environments, [Development](#) and [Production](#). These environments have separate web addresses and are not linked to each other in any way.

The Development system is strictly used for project development and testing with mock data. Live data collection and/or storage of **real data is strictly prohibited in the Development system. ONLY the Production system can be used for live “real” data collection.** REDCap users are allowed to only create a new project in the Development system. The development project then must be moved to the production system so that data collection can begin.

To migrate projects from the Development to the Production system, the PI or their designated project manager must click the ‘Move Project to Production’ button at the bottom of the Project Setup page. The Move-to-Production Request form will open automatically. The requester must complete all the required information and provide the appropriate IRB documentation. Upon submission, the REDCap Administrator will begin processing the move to production. After it has been approved and moved to the production system by the REDCap Administrator, the PI, and the requestor will be added as users to the project. The REDCap Administrator will then ask the requestor to verify and inspect the project one last time in Production; upon confirmation, the project will be finalized in production status and the PI will be automatically notified. It is then the responsibility of the PI or their designated project manager for adding/removing additional users and assigning privilege access. If the project is using REDCap to collect PHI/PII, the PI must ensure that study personnel either entering or accessing data stored with REDCap have been given the appropriate authority to do so.

Once the project is in Production status, changes cannot be made in real-time to the project as it was in Development status. However, changes to the project may be made 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. Edits in Production should only be for minor/simple fixes, such as typos. Making major changes to a project that is in Production should only be done as a last resort. Major changes should be tested in Development. Altering a project that is in Production and has data can cause data loss in some instances. If any critical issues are flagged, you will receive an email from the Administrator to confirm that you want to commit to the changes. The requester should be aware that changes to any variables might affect programmed calculations and/or branching logic. It is the responsibility of the requester to review and test all calculated fields and branching logic before submitting changes. The impact on these fields will NOT be tested by the REDCap Administrator.

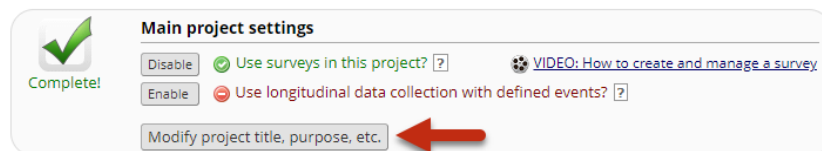
Now that we have reviewed the move-to-production process (which is noted in our User Agreement) - Have you finished developing your project in development? Have you tested it thoroughly? Do you have

IRB approval? Are you ready for your project to be moved to production? If so, follow the steps outlined below.

Before Moving Your REDCap Project to Production:

If you have created, tested, and finalized your instruments and project set-up, you are ready to move your project to Production status. Once your project moves into Production, you can start entering real data. When you request that your project moves to Production, the REDCap support team will review and complete the move. To make this process easier, please make sure that the following things are done before you move your project to Production:

- **Make sure that your project is fully set up and tested!**
You should have all of your data collection instruments (for example, all of your surveys and case report forms) and your overall project setup finished. Test your project by entering test data records to make sure everything is functioning correctly *before* you move your project into production.
- **Review the fields in your project for identifiers.**
All of the data fields that *could* be considered a PHI identifier should be marked. This includes names, dates, e-mail addresses, phone numbers, addresses or geographical information more specific than state, etc.
- **Double check that the information is correct in your main project settings.** In your main project settings, select "Modify project title, purpose, etc." to update the information:



All UCH REDCap projects **must** be for research **only**. Make sure the following fields are filled out:

- Project Name
- PI Name
- PI Email
- IRB Number
- Type of research

Modify Project Settings

Project title:
Title to be displayed on project webpage

Purpose of this project:
How will it be used?

Name of P.I. (if applicable):

First name MI Last name

Email of P.I. (if applicable)

Name of P.I. as cited in publications (if applicable):
(e.g., Harris PA)

IRB number (if applicable):

Please specify:
☐ Basic or bench research
☐ Clinical research study or trial
☐ Translational research 1 (applying discoveries to the development of trials and studies in humans)
☐ Translational research 2 (enhancing adoption of research findings and best practices into the community)
☐ Behavioral or psychosocial research study
☐ Epidemiology
☐ Repository (developing a data or specimen repository for future use by investigators)
☐ Other

Project notes (optional):
Comments describing the project's use or purpose that are displayed on the My Projects page.

How to Move your project to Production:

If you have completed all of the above checks, you are ready to move your project into Production. To request that a REDCap project be moved to Production, open the project, and select the *Project Setup* tab. At the bottom of the screen, click the 'Move to Production' button.

[Project Home](#) [Project Setup](#) [Other Functionality](#) [Project Revision History](#)

Project status: Development Completed steps 4 of 5

Modify project settings or make customizations

You have created your project and are ready to begin building on it. If you would like to modify the general project settings that you set when creating the project or if you wish to make some customizations to the project (e.g. enable auto-numbering for new records), use the buttons below.

Go to [Modify project settings](#) or [Make customizations](#)

Design your data collection instruments

Add or edit fields on your data collection instruments. This may be done by either using the Online Designer (online method) or by uploading a Data Dictionary (offline method), in which you may use either method or both. Quick links: [Download PDF of all data collection instruments](#) OR [Download the current Data Dictionary](#)

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

Have you checked the [Check For Identifiers](#) page to ensure all identifier fields have been tagged?

Set up project bookmarks (optional)

You may create custom bookmarks to webpages that exist inside or outside of REDCap. These bookmarks will be seen as links on the left-hand project menu and can be accessed at any time by users who are given privileges to do so. Every project bookmark has custom settings that allow one to control its appearance and behavior.

Go to [Add or edit bookmarks](#)

User Rights and Permissions

You may grant other users access to this project or edit the user privileges of current users on this project by navigating to the User Rights page. Additionally, if you wish to limit user access to certain records/responses for this project, you may want to use Data Access Groups, in which only users within a given Data Access Group can access records created by users within that group.

Go to [User Rights](#) or [Data Access Groups](#)

Move your project to production status

Move the project to production status so that real data may be collected. Once in production, you will not be able to edit the project fields in real time anymore. However, you can make edits in Draft Mode, which will then need to be approved by a REDCap administrator before taking effect.

Go to [Move project to production](#)

Select "Move project to production" to start the process of moving the project to Production

After you click this button, you may get the option to decide if you wish to Keep ALL or Delete ALL of the data that has been entered. Given that the development is only for testing, and NO real data should have been entered, you will select Delete ALL

Move Project To Production Status?

Are you sure you wish to leave the DEVELOPMENT stage? If you proceed, the project will be moved to PRODUCTION status so that real data may be collected. If you select the 'Delete ALL data' option below, all current collected data, calendar events, and uploaded documents will be deleted, otherwise all will remain untouched as the project is moved to production.

★ Have you checked the [Check For Identifiers](#) page to ensure all identifier fields have been tagged?

Keep existing data or delete?

☐ Keep ALL data saved so far.

☒ Delete ALL data, calendar events, documents uploaded for records/responses, survey responses (if applicable), data dictionary snapshots, and any logging events pertaining to data collection.

Once in production, you will not be able to edit the project fields in real time anymore. However, you can make edits in Draft Mode, which will be auto-approved or else might need to be approved by a REDCap administrator before taking effect.

YES, Move to Production Status Cancel

Click 'Yes, Move to Production'

Clicking the 'Move Project to Production' button will open automatically. The requester must complete **all** the required information and provide the appropriate IRB documentation. Upon submission, the REDCap Administrator will begin processing the move to production. After it has been approved and moved to the production system by the REDCap Administrator, the PI, and the requestor will be added as users to the project. The REDCap Administrator will then ask the requestor to verify and inspect the project one last time in Production; upon confirmation, the project will be finalized in production status and the PI will be notified when it is locked in production status. **Real data collection cannot begin until the project is locked in production status.**

It is the responsibility of the PI or their designated project manager for adding additional users and assigning privilege access. If the project is using REDCap to collect PHI/PII, the PI must ensure that study personnel either entering or accessing data stored with REDCap have been given the appropriate authority to do so.

As a reminder, **ONLY the Production system can be used for live "real" data collection.** The Development (*test/sandbox*) system is strictly used for design, development, testing, and training with

simulated mock data. Live data collection and/or storage of **"real" data is strictly prohibited in the Development system**. REDCap users are allowed to only create a new project in the Development system. The development project must be moved to the production system so that data collection can begin.