

Making Changes to a Project in Production – How-To Guide

***Warning: altering a database that is in Production can cause data loss. Major changes to your project should be done BEFORE submitting your project for Production. ***

If a Production database must be modified, follow these rules to protect your data:

(1) **Do not** change existing variable names (e.g. record_id, demo_date, labs_calcium, survey_firstname) if making changes via a data dictionary import, or data stored for those variables will be lost. To restore data that has been lost in this way, revert to the previous/original variable name(s).

(2) **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.

(3) **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.

Example (rearranging answer choices as they display on the screen):

(old values)	1, Married	(new/changed values)	1, Married
	2, Single		2, Single
	3, Divorced		3, Separated
	4, Separated		4, Divorced

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

Correct way to reorganize answer choices (keep the same coding; they do not have to be in numerical order):

1, Married
2, Single
4, Separated
3, Divorced

Example (adding additional answer choices):

(old values)	1, Dr. Smith	(new/changed values)	1, Dr. Smith
	2, Dr. Ross		2, Dr. Ross
	3, Dr. Williams		3, Dr. Williams
	4, Other		4, Dr. Abu
			5, Other

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Because the new value of “Other” is now ‘5,’ any previous subject data that was entered as “4, Other” will now be given the value of “4, Dr. Abu” because REDCap only looks at the codes (1, 2, 3, 4, etc.) and not the answers after the codes.

Correct way to add additional answer choices (keep the same coding; they do not have to be in numerical order):

- 1, Dr. Smith
- 2, Dr. Ross
- 3, Dr. Williams
- 5, Dr. Abu
- 4, Other

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:) 1, Yes	(new/changed values) 1, Yes
0, No	2, No
	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 subjects with “No” as the answer to this question/variable, one has to re-code “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 since the raw data value did not change.

Correct way to add and rearrange additional answer choices (keep the same coding; they do not have to be in numerical order):

- 0, No
- 1, Yes
- 77, NA

-or-

- 1, Yes
- 0, No
- 77, NA

(4) 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) fields. If you need to not show/retire answer choices, use the **@HIDECHOICE** action tag instead.

(5) Changing from a Text Box (Short Text) or Notes Box (Paragraph Text) to *any* other type of field will result in a loss of your existing data in those fields.

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(6) Any changes to the structure of the database, such as deleting events or deleting forms from events in a longitudinal project, enabling surveys, etc. can only be done by the REDCap Administrators.

Please submit a request at: <https://redcap.ctsi.ufl.edu/redcap/surveys/?s=DUPrXGmx3L> if you need changes only a REDCap admin can make..

Types of changes that will be approved *automatically* by REDCap (does not go through admin approval):

- 1) Adding additional answer choices to multi-choice questions (as long as existing answer choices were not re-coded)
- 2) Adding action tags to fields.
- 3) Adding or changing branching logic on fields.
- 4) Adding new forms/surveys to the project.
- 5) Adding new events to longitudinal projects.
- 6) Adding new questions to existing forms/surveys.
- 7) Adding or changing field validations (number, date, phone number, email, etc.).

Steps for Making Changes to a Project in Production

Note: To make changes to the project, you need the user right of “Project Design & Setup.” If you do not see “Online Designer” or the “Project Setup” page, you were not given rights to make changes to the project.

1. Download a copy of the project’s existing data via a data export (‘Data Exports, Reports, & Stats’) in case you make a mistake. REDCap will take a data dictionary snapshot when you go into Draft Mode. This snapshot, found on the Project Revision History page, can be used to revert your project back to its previous state if you make a mistake.
2. Select ‘Online Designer’ on the Project Setup page (Figure 1).
3. Click on Enter Draft Mode (Figure 2).
4. Click on the form(s) that need changes made (or create additional forms) and make the changes/add new fields just as you would while in Development mode (Figure 3).
5. After making all of the changes, go back to the Online Designer page and click on “Submit Changes for Review” (Figure 4).

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6. If you want to view all of your changes before you submit them click on “View detailed summary of all drafted changes.” If you want to remove the changes you made, click on “Remove all drafted changes” (Figure 4).
7. If the changes will not affect existing data in any way, the changes will be automatically applied once you submit them.
8. Otherwise, the REDCap Team will receive a copy of your changes and contact you about them. If you want to know why the changes did not get automatically approved by REDCap, click on “Why weren’t my changes made automatically?” (Figure 5).

“Making Production Changes” Help & FAQs Page:
<https://redcap.ctsi.ufl.edu/redcap/index.php?action=help#ss70>

Figure 1:

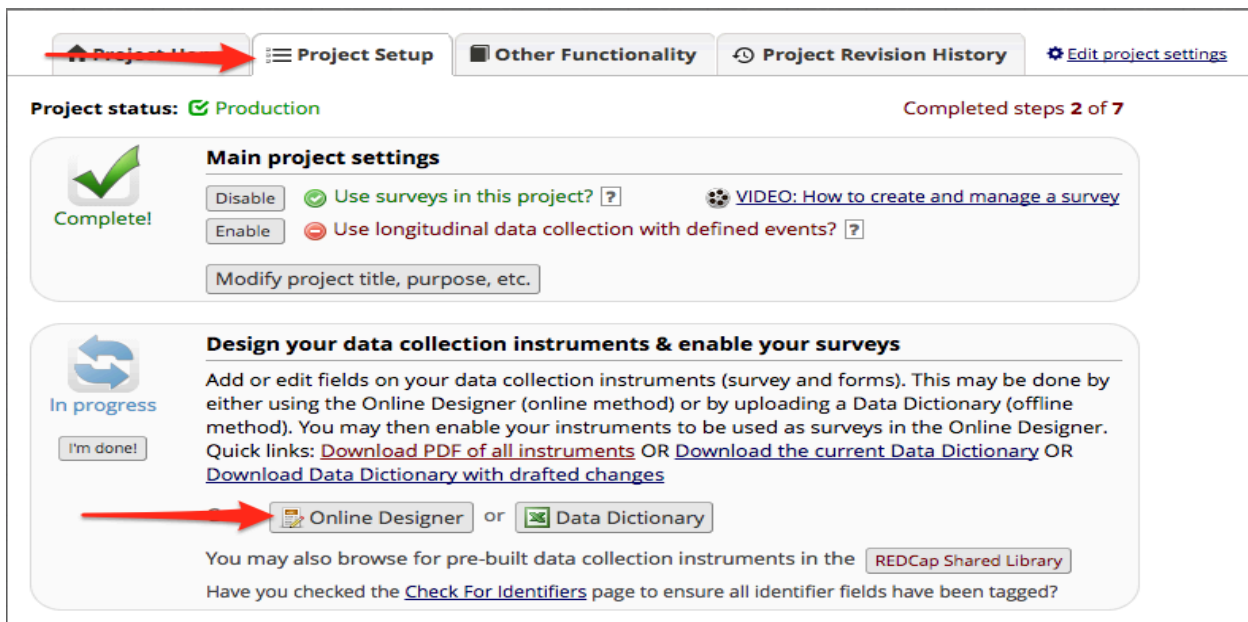
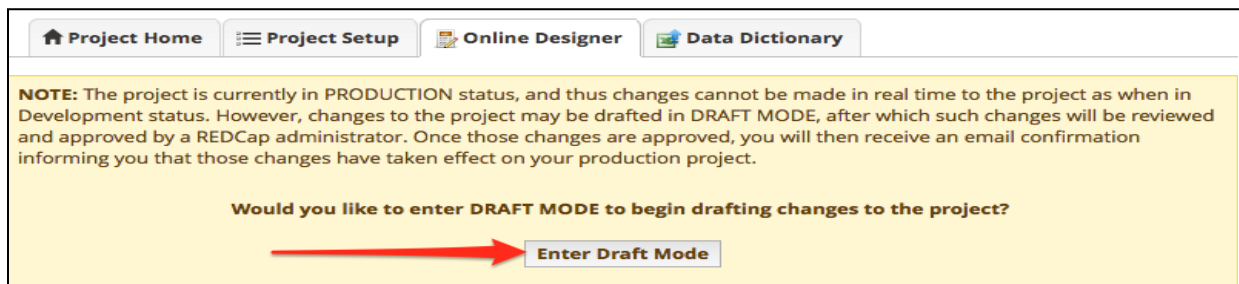


Figure 2:



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Figure 3:

Data Collect Instruments

Click to modify Instrument
Add new fields/questions to the instrument or modify existing ones

Survey Login

Add new instrument:

- Create a new instrument from scratch
- Import a new instrument from the official REDCap instrument library
- Upload instrument ZIP file from another source

Instrument name	Fields	View PDF	Enabled a survey	Instrument actions
Demographics	25			Choose action
Test	3		Enable	Choose action
Baseline Data	18		Enable	Choose action
Month 1 Data	22		Enable	Choose action
Month 2 Data	19		Enable	Choose action
Month 3 Data	27		Enable	Choose action
Completion Data	5		Enable	Choose action

Figure 4:

Project Home Project Setup Online Designer Data Dictionary

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: 126
Fields to be deleted: 0 / Existing field count: 126

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

Figure 5:

Awaiting review of project changes

Your drafted changes to the project were submitted and will first be reviewed and approved by a REDCap administrator. When the changes have been approved, you will receive an email notification stating that those changes have taken effect on your production project.

If you have any questions regarding this, please contact **REDCap Support** (CTSI-REDCAP-SUPPORT-L@LISTS.UFL.EDU).

[Why weren't my changes made automatically?](#)

While your changes are pending, you may still [view a detailed summary of all drafted changes](#).

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View of the detailed summary of 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

This is the page that will explain which fields are being deleted (and how many records contain data in this field), which forms are being deleted (name of forms only), which fields are being added, which new forms are being added. If making changes to a field (that is not deleting the field), these changes will be shown here as well. If the changes have red text underneath, then REDCap is telling you there may be an issue.

In the example above, I am deleting a field called [cirr_etiology] which has 1 record with data in that field, so 1 record will lose the data already entered into that field since it is being deleted.

In the example below, I have relabeled my answer choices from

0, Male

1, Female

to

0, Female

1, Male

As such, REDCap is telling me that I may be relabeling data, which I am. If you click on the Compare button:

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Variable Name	Section Header	Field Type	Field Label	Choices or Calculations	Field Note	Text Validation Type	Text Validation Min	Text Validation Max	Identifier?
demo_gender		radio	Gender	0, Male 1, Female 0, Female 1, Male *Possible label mismatch because of label changes. Check if okay. Compare					

You can see that 11 records that previously had the value of Female will now have a value of Male and 10 records that previously had the value of Male will now have a value of Female.

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
0	Female	0	Male	Altered	11
1	Male	1	Female	Altered	10

Close

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In the example below, I have deleted an answer choice from a checkbox field (can select multiple answers). As such, REDCap is telling me that I may be deleting data, which I am.

Variable Name	Section Header	Field Type	Field Label	Choices or Calculations	Field Note	Text Validation Type	Text Validation Min	Text Validation Max	Identifier?	Branching Logic
demo_race		checkbox	Race	1, American Indian 3, Native Hawaiian or Pacific Islander 4, Black or African American 5, ... Show more *Data MIGHT be lost due to deleted choice(s) Compare						

If you click on the Compare button:

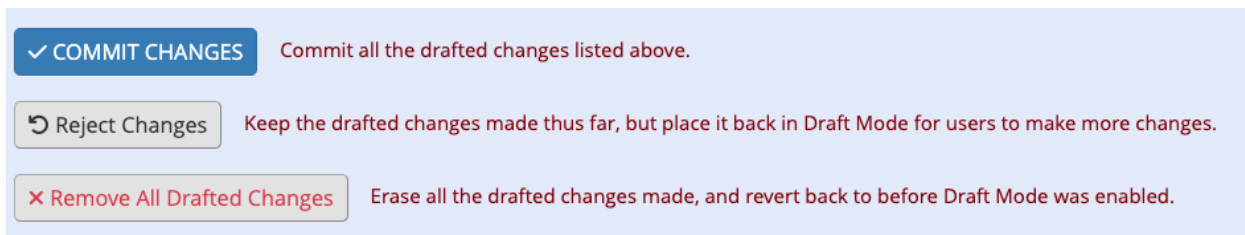
Existing Value	Existing Label	Draft Value	Draft Label	Status	Number of records having this value
1	American Indian	1	American Indian	Unchanged	3
2	Asian	-	-	Removed	4
3	Native Hawaiian or Pacific Islander	3	Native Hawaiian or Pacific Islander	Unchanged	2
4	Black or African American	4	Black or African American	Unchanged	3
5	White	5	White	Unchanged	6
88	More than one race / Other race (specify below)	88	More than one race / Other race (specify below)	Unchanged	0

You can see that 4 records that previously had Asian selected will now have Asian not selected anymore. If only Asian was selected, those records will now have no data for Race. If White and Asian were selected, now only White will be selected.

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Since the post-production change approval by a REDCap admin is all-or-nothing (every change made is approved or every change made is rejected/removed), it is highly recommended you make changes in small batches: start with changes that you know will not need approval then work through the changes that will need approval.

The options that administrators have for approving changes is shown below to clarify what options are available to the admins:



A screenshot of the REDCap interface showing three buttons for managing draft changes. The first button is blue with a checkmark icon and the text 'COMMIT CHANGES'. The second button is light gray with a circular arrow icon and the text 'Reject Changes'. The third button is light gray with a red 'X' icon and the text 'Remove All Drafted Changes'. Each button is followed by a descriptive text line.

✓ COMMIT CHANGES	Commit all the drafted changes listed above.
↺ Reject Changes	Keep the drafted changes made thus far, but place it back in Draft Mode for users to make more changes.
✗ Remove All Drafted Changes	Erase all the drafted changes made, and revert back to before Draft Mode was enabled.