

REDCap – How to Make Changes in Production

- Step 1
 - Navigate to the Project Setup tab for the project.
 - Click on 'Online Designer' under 'Design your data collection instruments & enable your surveys.'

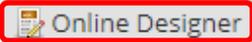


Complete!

[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**

- Step 2
 - 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?



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.

- Step 4
 - Begin making any changes to the Forms/Instruments by hovering over the Form/Instrument and clicking on the pencil icon.

Data Collection Instruments		Survey options:		Add new instrument:		
		Survey Queue	Survey Login	<input type="button" value="Create"/> a new instrument from scratch <input type="button" value="Import"/> a new instrument from the official REDCap Shared Library <input type="button" value="Upload"/> instrument ZIP file from another project/user or external libraries		
	Survey Notifications					
Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options	
Demographics 	5			Choose action	<input type="button" value="Survey settings"/>	<input type="button" value="+Automated Invitations"/>
Daily Diaries	3			Choose action	<input type="button" value="Survey settings"/>	<input type="button" value="+Automated Invitations"/>
Treatment Survey	1			Choose action	<input type="button" value="Survey settings"/>	<input type="button" value="+Automated Invitations"/>

- Step 5
 - Once all changes have been made. Click on ‘Submit Changes for Review.’ This selection will automatically email the CTSI REDCap Administrators 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](#)

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](#)

- Step 6
 - The status of the Online Designer will change to ‘Awaiting review of project changes.’
 - The user may review the summary of submitted changes by clicking on ‘View a detailed summary of all drafted changes.’

 **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 **CTSI REDCap Team** (ctsiredcap@wakehealth.edu).

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

- Step 7
 - If the CTSI REDCap Administrator has any questions regarding the changes, they will reach out to the submitter via email.
 - Once the CTSI REDCap Administrator has committed the changes, the user will be notified via email.