



Project Creation and Lifecycle Procedures

1. Define project purpose within the Project Description.

- All projects supporting research should have their purpose set accordingly in the **Purpose of this project** field (Figure 1).

2. List PI and IRB contact information.

- All projects with purpose listed as 'research' should have the PI contact information listed and the current IRB number (Figure 2).

3. Project creators should always add the lab/project manager as users to new projects.

- All projects should be created with at least two users added: the creator and the lab/project manager.
- See *User Access Procedures and the *User Rights Dictionary for more information on efficiently adding users and assigning appropriate rights.

4. Test a new project BEFORE moving it from Development Mode to Production Mode.

- Projects should remain in Development Mode until instruments, branching logic, and other features are fully tested.
- Once in production mode, data integrity protocols prevent users from making changes to project structures outside of draft mode without administrator review (Figure 3).
 - This prevents accidental data loss when changes are made to projects in Production Mode.

5. Only input real data into projects that are in Production Mode.

- Projects for which **real data** are being collected **should always be moved to Production Mode** prior to actual data collection or survey deployment.

6. Projects for which data collection has ended should be moved to Inactive Mode.

- Only users with project design rights may move a project to Inactive Mode under the 'Other Functionality' tab -> 'Project Management'.
- See [project Mode definitions](#) for more information.

7. Projects for which access to data and project files is no longer required should be moved to Archived Mode.

- Only users with project design rights may move a project to Archived Mode under the 'Other Functionality' tab -> 'Project Management'.
- See [project Mode definitions](#) for more information.

Figure 1

+ Create a new REDCap Project

You may begin the creation of a new REDCap project on your own by completing the form below and clicking the Create Project button at the bottom.

Project title:
Title to be displayed on project webpage

Purpose of this project:
How will it be used?

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

Figure 2

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

Figure 3

NOTICE

!!WARNING!! - You are about to move your project to **Production Mode!** This action should only be completed if you have finished building and testing your project and are ready to begin collecting data. Moving a project to **Production Mode** can only be reversed by a REDCap administrator. You should review the REDCap Terms of Use before proceeding.

Project Mode Definitions

Development Mode:

Development Mode is for project design and testing. Once a project is moved from Development Mode to Production Mode, all changes must be approved by a REDCap administrator to prevent the loss of data.

Production Mode:

Production Mode is for real data collection. Changes to the project structure, including variable names, adding new instruments and variables, altering question choices, fixing typos, or changing choice codes are not applied in real time. Project changes occur in Draft Mode and are subject to review and approval by a system administrator.



Not started

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 be auto-approved or else might need to be approved by a REDCap administrator before taking effect.

Go to [Move project to production](#)

Inactive Mode:

Inactive Mode is for an active project for which no data collection activities are being performed. This mode automatically closes survey access to prevent unintentional/late responses from being collected.

[← Move to inactive status](#)

Move the project to inactive status if data collection is complete. This will disable most project functionality, although all collected data will remain intact. Once inactive, the project can be moved back to production status at any time.

Archived Mode:

[📁 Archive the project](#)

You may archive the project if you do not wish to use it any longer. Archiving the project will take it offline and remove it from your list of projects. It can only be accessed again by clicking the *Show Archived Projects* link at the bottom of the *My Projects* page. You will be able to un-archive the project at any time and bring it back online simply by accessing it again and returning to this page.