

Project and Survey Deactivation

REDCap projects should be moved into **inactive status** once data collection activities have concluded. Inactive status disables the majority of functionality within a project, including survey deployment, instrument and record editing, and API/REDCap Mobile access. In the event that surveys are used, but additional record editing and data entry will occur, the project may remain in **Production** mode. However, individual surveys should be set to **Offline**.

Survey Deactivation

Surveys may be deactivated for the entire project in **Project Setup** or individually in the **Online Designer**.

Procedures for Disabling the Use of Surveys within a Project

1. **Navigate to the project.**
2. **Select the Project Setup tab or link (Figure 1).**
3. **Under Main project settings, select 'Disable' next to Use surveys in this project (Figure 2)?**
4. **Confirm the disable action in the pop-up window (Figure 3).**

Figure 1

Project navigation options with the Project Setup tab highlighted.



Figure 2

Main Project Settings menu with the disable surveys highlighted.

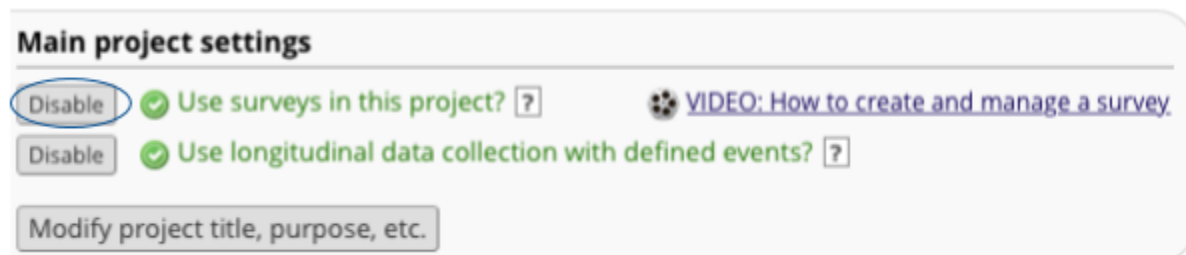
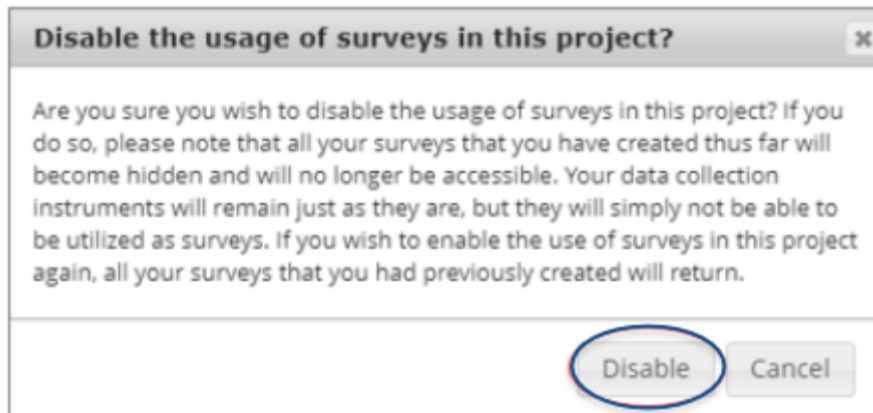


Figure 3

Disable survey usage pop up window with Disable button highlighted.



Procedures for Taking Surveys Offline Using the Online Designer

1. Navigate to the project.
2. Select the Project Setup tab or link (Figure 1).
3. Under Design your data collection instruments, select 'Online Designer.'
4. Click the 'Survey Settings' button for each instrument enabled as a survey. Instruments set as surveys are identifiable by a 'green shield and check mark' icon (Figure 4).
5. In the Survey Status section, use the drop-down menu to change the status from 'Active' to 'Offline' (Figure 5).
6. Scroll to the end of the page and save the new survey settings.
7. Repeat steps 4-6 for each survey in the project.

Figure 4

Instrument view in the Online Designer with Survey Settings Highlighted.

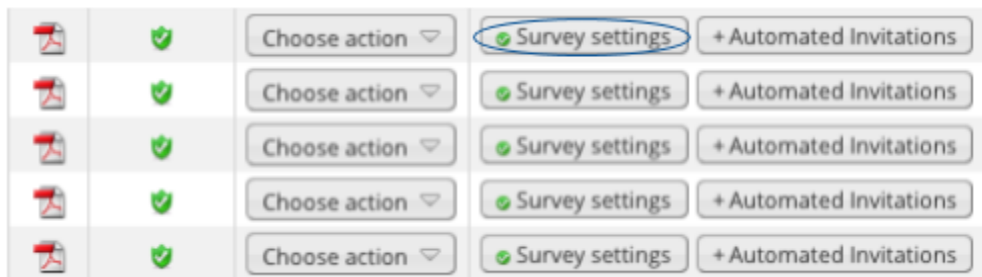


Figure 5

Survey setting modification view with survey status highlighted.



Project Deactivation

Once all data collection and data entry activities have concluded, projects should be moved to **Inactive Status**. Alternatively, a project can be moved to **Archived Status** which will set the project to inactive status in addition to hiding the project from normal view under **My Projects**. This option is recommended for retaining project files and data for records retention compliance once all data and project backup files have been exported.

Moving a Project to Inactive Status

1. Navigate to the project.
2. Select the **Other Functionality** tab (Figure 6).
3. Under the **Project Management** section, click the 'Move to inactive status' button (Figure 7).
4. Confirm the move to inactive status in the pop-up window.
5. Optionally, these steps can be repeated for 'Move to archive status.'

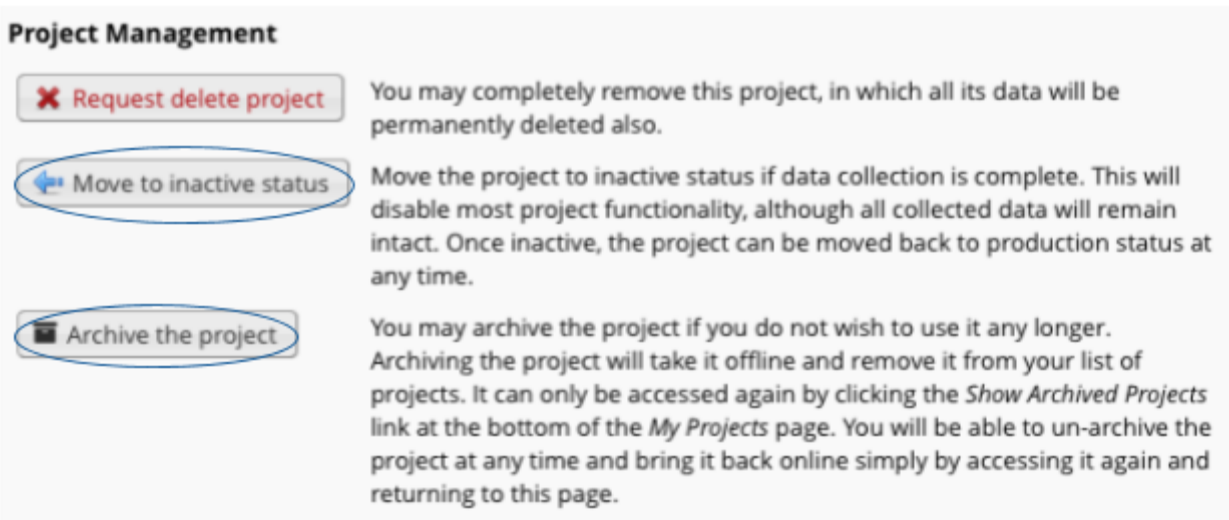
Figure 6

Project navigation options with the Other Functionality tab highlighted.



Figure 7

Project management options with inactive status and archive options highlighted.



Project Management

- Request delete project** You may completely remove this project, in which all its data will be permanently deleted also.
- 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.
- 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.