

Testing Your REDCap Project Thoroughly

You've heard the REDCap team say it - before moving to Production mode and collecting real data, be sure to test your project thoroughly.

But what does “testing” mean exactly?

The best way to test your project thoroughly is to go through the **WHOLE data entry process, end-to-end**. Depending on how complex your project is, you'll want to do this MANY times to make sure you've testing all the branching logic, calculations, survey invitations, alerts, piping, survey queue, external modules, and any other features you might be using!

Testing yourself is the best way to uncover mistakes and hiccups in your project. It's not enough to just look at the Online Designer!

If you're just using Data Entry forms, this means going to Add/Edit records, and adding records with pretend data. You'll want to select all possible options to make sure all your branching logic is working.



| | |
|------------------------------|----------------------------------|
| Total records: 4 | |
| Choose an existing Record ID | -- select record -- |
| | + Add new record |

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If your project contains surveys, you'll need to **send the surveys to your own email address/your teammates' email addresses and follow the entire process that you plan to use with participants.**

Your participant list will end up looking something like this in the testing process, with your own/your colleagues' emails:

| | | | | | | | | |
|------------------------|--------------------|----------|---|---|---|---|---|--|
| 1) berriganl@chop.edu | 1 | Disabled |  | - |  |  |  | |
| 2) berriganl@chop.edu | 2 | Disabled |  | - |  |  |  | |
| 3) berriganl@chop.edu | 3 | Disabled |  | - |  |  |  | |
| 4) berriganl@chop.edu | 10 | Disabled |  | - |  |  |  | |
| 5) berriganl@chop.edu | 11 | Disabled |  | - |  | - | - | |
| 6) berriganl@chop.edu | 12 | Disabled |  | - |  | - | - | |
| 7) berriganl@chop.edu | 13 | Disabled |  | - |  | - | - | |
| 8) berriganl@chop.edu | 14 | Disabled |  | - |  | - | - | |
| 9) berriganl@chop.edu | 15 | Disabled |  | - |  | - | - | |
| 10) berriganl@chop.edu | 16 | Disabled |  | - |  | - | - | |
| 11) berriganl@chop.edu | 17 | Disabled |  | - |  | - | - | |
| 1) lechtenbel@chop.edu | 18 | Disabled |  | - |  | - | - | |
| 2) lechtenbel@chop.edu | 19 | Disabled |  | - |  | - | - | |

If you don't have a plan for what your survey distribution process will be, you're not ready to move to Production! That's OK, we can help you figure that process out. Try starting with this survey development tool: <https://redcap.link/surveydesigntool>

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But what about all the fake data I created?

This is exactly what Development mode is for. You can create as many test records as you need to. There is no limit. Complex projects can require **hundreds** of test records before they're ready to go live.

When you move to Production mode, REDCap will ask whether you want to keep or delete the data you've saved so far. All your data at that point should be test data, so you should be able to choose "Delete ALL data in the project":

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: (168 records)

☒ Delete ALL data in the project (including any survey responses, calendar events, documents uploaded onto forms/surveys, and all archived data export files stored in the File Repository, and any logged events that pertain 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

If your Record Status Dashboard looks something like this (lots of records completed end-to-end) before you move to Production, you're on the right track:

| Record ID | information form - fill in first | form (for use with LSA interpreters) | participants and study staff | rep OK subject if over 18 | rep OK subject if over 18 | for short form and Study Summary Document |
|-----------|----------------------------------|--------------------------------------|------------------------------|---------------------------|---------------------------|---|
| 1 | ✓ | ✓ | ✓ | ○ | ✓ | ✓ |
| 2 | ✓ | ✓ | ✓ | ○ | ✓ | ✓ |
| 4 | ✓ | ✓ | ✓ | ○ | ✓ | ✓ |
| 5 | ✓ | ✓ | ✓ | ○ | ✓ | ✓ |
| 6 | ✓ | ✓ | ✓ | ○ | ✓ | ✓ |
| 8 | ✓ | ✗ | ✓ | ○ | ○ | ○ |
| LB TEST | ✓ | ✓ | ✓ | ○ | ✓ | ✓ |
| TEST1 | ✓ | ✓ | ✓ | ○ | ✓ | ✓ |
| TEST2 | ✓ | ○ | ✓ | ○ | ○ | ✗ |