**Protocol applies to:**

Development Instance: <https://rcapdev.ouhsc.edu>

BBMC Instance: <https://bbmc.ouhsc.edu/>

**Upgrade file location:** <https://iwg.devguard.com/trac/redcap/wiki/RedcapDownloadArea>

**Frequency of upgrade:** Monthly

**Timing of upgrade:** Friday evening at 9:00

**Backups:**

Request VM snapshots on Monday before upgrade

Verify snapshot request on Thursday before upgrade

**Upgrade Version:**

Use the “Standard Release” upgrade version of REDCap that is two releases prior to the most current release.

**Running the upgrade:**

Before Starting Upgrade:

* Notify users that REDCap will be unavailable
* Take REDCap offline using the REDCap control panel

PHP Tasks:

* New PHP code replaces the old PHP code in the web server’s REDCap directory
* Navigate to the REDCap web site. It should automatically recognize that you’re in the upgrade module and provide SQL code that will modify/update the database schema.
* For more details see the following instructions within download zip file.

SQL Tasks:

* During the upgrade, copy and paste the sql update code into a text document to be archived. It will be saved at zzzz on the file server.
* Run sql from the MySQL workbench NOT from phpMyAdmin.
* All database messages are saved in a second text document, regardless if errors are present. It will be saved at zzzz on the file server.
* If any SQL errors occur, record error message, stop upgrade, and request the VM snapshot be reverted to the saved version.
* After successful completion of the upgrade process, go through the upgrade test scripts for REDCap.

**Testing:**

* If there are testing errors detected with REDCap during the testing scripts, request the VM snapshot be reverted to the saved version.
* If NO testing errors are detected:
  + Put REDCap back online using the REDCap control panel
  + Notify users that REDCap is available for use through the REDCap control panel.

# Checklist

**Instance**

\_\_\_\_\_\_\_\_\_\_ Development: <https://rcapdev.ouhsc.edu>

\_\_\_\_\_\_\_\_\_\_ BBMC: <https://bbmc.ouhsc.edu/>

**REDCap Upgrade Version:**

\_\_\_\_\_\_\_\_\_\_ <https://iwg.devguard.com/trac/redcap/wiki/RedcapDownloadArea>

**REDCap Upgrade Script**

\_\_\_\_\_\_\_\_\_\_ Date of Upgrade

\_\_\_\_\_\_\_\_\_\_ Upgrade Start Time

\_\_\_\_\_\_\_\_\_\_ Upgrade End Time

\_\_\_\_\_\_\_\_\_\_ Date that the BBMC requested the VM Snapshot was scheduled

\_\_\_\_\_\_\_\_\_\_ Date that the BBMC verified the VM Snapshot was scheduled

\_\_\_\_\_\_\_\_\_\_ **PHP Version**

\_\_\_\_\_\_\_\_\_\_ **MySQL Version**

**REDCap SQL Upgrade Code (copy the code and paste below):**

**REDCap SQL Error Log (copy and paste any SQL error messages that occur during the upgrade process):**

**REDCap Testing Scripts:**

\_\_\_\_\_\_\_\_\_\_ Baseline Test Script

\_\_\_\_\_\_\_\_\_\_ Basic Functionality Script

\_\_\_\_\_\_\_\_\_\_ Control Panel System Configuration Script

\_\_\_\_\_\_\_\_\_\_ User Acceptance Testing Script