



# Version 6.10 Details



THE UNIVERSITY OF  
CHICAGO MEDICINE &  
BIOLOGICAL SCIENCES



CENTER FOR  
**RESEARCH**  
INFORMATICS

© 2015 Vanderbilt University

## New Features:

- [Project Folders](#)
  - [Survey Themes](#)
  - [Embedded Videos for Descriptive Fields](#)
  - [Embedded Audio for Descriptive Fields](#)
  - [Auto-complete for Drop-down Fields](#)
  - [Auto-continue to Next Survey](#)
  - [Other Improvements](#)
- 

## Project Folders

If you have a lot of REDCap projects, then you realize just how unwieldy your My Projects page can get and how difficult it can be at times to find the specific project you're looking for. But now with Project Folders, you can easily group your projects into "folders" to organize them so that you can find your projects faster and even hide the ones you don't want to see all the time. On your My Projects page right above your projects, you will now see an Organize button that will open a popup to allow you to define as many folders as you want. And once you create some folders, you can quickly and easily assign projects to them so that those projects will appear grouped together as a section on your My Projects page. You can set each folder with custom colors for its text and background, and set the order of your folders to control the order in which they appear on your My Projects page. Tip: One great thing about folders is that you can put a single REDCap project into multiple folders. Also, you can collapse the folder on the page (by clicking the "minus" square icon) so that it hides the list of projects in the folder, and it remembers if the folder was collapsed when you return to your My Projects page again later so that it keeps it collapsed. Project Folders are for personal organization, so no one else can see a user's folders (except for REDCap administrators when viewing the user's projects).

### *Use cases for Project Folders:*

- If you have a lot of projects that you don't want to delete but you simply want to hide from the My Projects page, you can easily create a folder named "Hidden", for example, and then assign all those projects to that folder. Then you can keep that folder collapsed and at the bottom of the page to keep those projects out of view.
- If you're working on a project/study that utilizes multiple REDCap projects, it's easy to create a new folder for the study so that all those REDCap projects are grouped together logically, which can really help if you're jumping in and out of those projects a lot or if you have projects belonging to various studies in which you are involved.
- If you have some REDCap projects that you access frequently, it can be helpful to create a folder named "My Favorites" to put those projects in, and then keep that folder at the top of your My Projects list so that they are easy to access.

## Survey Themes

You can now take your REDCap survey to the next level with our new survey theme options. By theming your survey, you can make it as attractive and sleek as you wish for your respondents. On the Survey Settings page for any given survey (accessed via the Online Designer), there are 3 new options: 1) Size of survey text, 2) Font of survey text, and 3) Survey theme. With options 1 and 2, you can increase the size of all the text in the survey and set all the text to be a specific font you desire. Then you may choose a survey theme, which allows you to pick a new color scheme for the survey. There are several predefined themes available that you may use, but if you do not prefer them, you can easily click the Customize button to customize the color scheme of

the survey any way that you want, in which it will open up 8 different options for modifying the colors of various elements in the survey. A “survey design preview” box is displayed on the Survey Settings page so that the user can see how their survey design choices will make their survey look to respondents. It's very easy to create your own custom survey theme, and if you create a custom theme, you will have the additional option to save your theme so that you may easily use it again in the future for another survey.

- A “University of Chicago” custom theme is available for all to use.
  - <https://redcap.uchicago.edu/surveys/?s=nMJDfL4Zcq>
- Here are some other survey theme examples:
  - <https://redcap.vanderbilt.edu/surveys/?s=49LX4ALRXR>
  - <https://redcap.vanderbilt.edu/surveys/?s=4ETMR9TW3N>

### **Embedded Videos for Descriptive Fields**

Users can embed an externally hosted video (e.g., YouTube, Vimeo) on a data entry form or survey page by simply providing the video URL (web address). The video can be displayed inline on the page, or it can instead be initially hidden but displayed after clicking a button. Any video can be set to full-screen mode, if desired. Works when viewed in a web browser on mobile devices.

### **Embedded Audio for Descriptive Fields**

Users can embed an attached audio file (e.g., MP3, WAV) on a Descriptive field and display it as a clickable link or in an embedded audio player on the data entry form or survey page. Works when viewed in a web browser on mobile devices.

### **Auto-complete for Drop-down Fields**

Users can enable the auto-complete feature in the Online Designer for drop-down fields. Auto-complete can also be enabled via the Data Dictionary by entering "autocomplete" in the validation column for "dropdown".

- The auto-complete feature transforms the drop-down into a combo-box that still functions as a normal drop-down list but has the additional capability of employing a text search on the options in the drop-down in order to find an option much more quickly. Enabling the auto-complete feature is most useful when a drop-down list is very long with lots of options.
- Note: Even though users are able to hand-enter text into the text field when searching the autocomplete drop-down, it will not allow saving the value unless it is a valid option in the drop-down list.

### **Auto-continue to Next Survey**

Automatically start the next survey instrument after completing a survey.

- On the Survey Settings page for any survey instrument listed on the Online Designer, under the "Survey Termination Options" section, the user can enable the survey auto-continue setting so that when that survey has been completed, the participant will automatically be redirected to the next survey instrument (if any exist after that survey). If the next instrument is a data entry form that has not been enabled as a survey, then it will be skipped during this process.
- Linking surveys together is only supported inside the SAME EVENT and must be enabled for each survey a user wishes to link. This feature allows users to have separate survey instruments strung together to appear as though they were a single survey to the participant. This is especially useful for complex longitudinal projects where different combinations of instruments are given in separate events. If enabled and this is the last survey, the selected termination option below will be used.
- NOTE: If users wish to utilize more advanced conditional logic to control which survey that the participant goes to next, they should use the Survey Queue feature, which can be enabled in the Online Designer.

## Other Improvements:

- Checkboxes and radio button fields on surveys and data entry forms can now be selected/checked by clicking the label text of the option rather than just clicking the checkbox or radio button itself. This makes it easier and more intuitive to select an option. (Note: This does not work on IE 8 and earlier versions.)
- The Codebook (on the Project Home page) now has pencil icons next to each field so that when an icon is clicked it takes the user to the Online Designer and opens that field for editing. This allows users to quickly make edits to fields when viewing the Codebook. There also exists a "Return to Codebook" button at the top of the Online Designer to allow them to return back to the Codebook again.
- The Codebook page in a project now has branching logic icons next to each field so that when an icon is clicked it takes the user to the Online Designer and opens that field for editing its branching logic. This allows users to quickly make edits to fields' branching logic when viewing the Codebook. There also exists a "Return to Codebook" button at the top of the Online Designer to allow them to return back to the Codebook again.
- On the Record Status Dashboard page of a project that has Data Access Groups, if a user is not in a DAG, then they will see a new drop-down at the top of the page to filter the records by any given DAG. Also, it will remember their selection in case they return to that page later, in which the drop-down will be pre-selected with their last selection of it during that same REDCap session.
- The Data Import Tool now has a new option "Allow blank values to overwrite existing saved values?" that allows users to choose if they want to perform a mass overwrite of saved values with blank values when importing data. By default, it will ignore all blank values in the uploaded CSV file (as it has always done). NOTE: Overwriting data with blanks is IRREVERSIBLE. It is suggested you run a full data export as a backup copy if you are unsure about how to use this feature. Use this feature with caution.
- On the Define My Events page in a longitudinal project, it no longer displays the Days Offset and Offset Range columns in the events table if the Scheduling module is not enabled for the project. Since those columns are only utilized during scheduling, this provides a simpler and less confusing interface for users when scheduling is not being used. When creating a new event in this case, the event name is the only thing that needs to be provided, after which the order of that event or any event in the current arm can be change using drag-n-drop by dragging that event's row in the table.
- When viewing a data entry form where the instrument has been enabled as a survey, it will now display the "Save and Mark Response as Complete" button if the survey has not been started yet (i.e., on the survey page), thus allowing the user to mark it as complete without even having to open the survey page. In previous versions, users would only see that button as a valid option once the survey had at least been partially completed via the survey page.
- When exporting a survey's participant list to CSV file, it now includes the record name of the respondent if it corresponds to an existing record and if it is identifiable (i.e., if the participant has a Participant Identifier defined or if the designated survey email field has been enabled).
- A project's Survey Invitation Log is now downloadable in CSV format.
- When viewing the Compose Survey Invitations popup on the Participant List page, it now displays the total count of all participants that have been selected in that popup to be invited to take the survey.
- When copying a project, it now displays a new option to copy "all project bookmarks" on the Copy Project page, thus allowing users to copy all project bookmarks in that project to the new project.
- When copying a project, it will now automatically copy the values for "Custom text to display at top of Project Home page in project" and "Custom text to display at top of all Data Entry pages in project", which previously could only be modified by the REDCap Administrator.
- New styling options were added to the rich text editor for survey instructions and survey completion text, such as setting text and background colors, inserting tables, copy-paste options, and indentation options.
- Survey pages are now more compatible and better fitting to the screen when viewed on mobile devices.