INTRODUCTION TO REDCap

Presenter: Julissa Acevedo
REDCap Administrator / System Analyst
History & Background
REDCap History

**Then**
- 2004: Developed at Vanderbilt
- 2006: Global consortium
- 2010: University of Chicago
- 2011: Center for Research Informatics
- 2012: REDCap at UChicago

**Now**
- Worldwide: 3,200 institutions, 129 countries, 616,000 projects, 835,000 users
- UChicago: 4,100 projects, 4,500 users
CRI – WHAT WE DO

WEBSITE: cri.uchicago.edu

ACQUIRE DATA
Explore clinical data available for research and make a data request.

Clinical Research Data Warehouse
Cohort Discovery

ANALYZE DATA
We offer high-performance computing and advanced bioinformatics analysis for the most complex datasets.

Bioinformatics Core
High Performance Computing
Computing Resources

STORE DATA
Our storage is secure, standards-compliant, and backed up daily.

CRI Data Storage

MANAGE DATA
Manage studies, surveys, and databases for research.

REDCap
Clinical Trials Informatics

FIND A CUSTOM SOLUTION
Learn more about the CRI’s tailor-made research solutions.

Custom Applications
WHAT IS REDCAP?

**Web-based software** used to create and manage research databases and participant surveys.

**Developed as a tool** to help researchers collect and manage data effectively and responsibly.
REDCAP ARMY KNIFE!
WHAT ARE THE ADVANTAGES?

**Accessible**
- web-based access (on and off campus)
- access for multi-site collaborations

**Customizable**
- fast and flexible to design
- modifications at anytime

**Accurate**
- ensures consistent and accurate data entry
- data quality checks to look for errors

**Secure**
- user authentication against BSDAD or UCHAD
- nightly backups, weekly vulnerability scans

**Free!**
- includes training, design guidance, troubleshooting
SEMINARS TOPICS

Project Setup
- Creating a project
- Adding and editing fields
- Optional modules and customizations
- Testing your project
- Moving to production

Using Surveys
- Enabling surveys
- Settings & customizations
- Public link vs private links

Applications & Tools
- Record status dashboard
- Project change log
- Exports and reports
- Data dictionary
- File repository
Project Setup
**LOGGING INTO REDCAP**

**WEBSITE:** redcap.uchicago.edu

**NEW USERS:**
Log in with either your BSDAD or UCHAD account (use only one account). If you do not have either account, a sponsor may request an account for you by filling out the CRI Collaborator Account Request Form. Please follow up with our CRI Help Desk on this request. Also, CNET accounts do not allow access to REDCap.

**EXTERNAL ACCOUNTS:**
To request accounts for external collaborators from other institutions, fill out the CRI Collaborator Account Request Form. Please follow up with our CRI Help Desk on this request.

**ADDING A USER TO A PROJECT:**
Please do not add the user’s email address to the project’s User Rights page, as this will not work. The user first needs to log into REDCap to register their account. You can then add them to the project’s User Rights page at that point. Contact the CRI REDCap Administrator for further help.

**SUSPENDED ACCESS:**
If REDCap states your account is suspended upon login, contact the CRI REDCap Administrator to have your access unsuspended. Access is suspended after one year of no login activity.

**PASSWORD HELP:**
If you need password help, contact the appropriate help desk below and ask for a password reset for either your BSDAD, UCHAD, or CRI collaborator account:

<table>
<thead>
<tr>
<th>BSDAD/UCHAD Accounts</th>
<th>CRI Collaborator Accounts</th>
</tr>
</thead>
<tbody>
<tr>
<td>CBIS Service Desk</td>
<td>CRI Help Desk</td>
</tr>
<tr>
<td><a href="mailto:help@bsd.uchicago.edu">help@bsd.uchicago.edu</a></td>
<td><a href="mailto:access@researchinformatics.uchicago.edu">access@researchinformatics.uchicago.edu</a></td>
</tr>
<tr>
<td>773-702-3456</td>
<td>773-834-8475</td>
</tr>
</tbody>
</table>

Please log in with your user name and password. If you are having trouble logging in, please contact University of Chicago REDCap Support.
Welcome to REDCap!

REDCap is a mature, secure web application for building and managing online surveys and databases. Using REDCap's streamlined process for rapidly developing projects, you may create and design projects using 1) the online method from your web browser using the Online Designer; and/or 2) the offline method by constructing a 'data dictionary' template file in Microsoft Excel, which can be later uploaded into REDCap. Both surveys and databases (or a mixture of the two) can be built using these methods.

REDCap provides automated export procedures for seamless data downloads to Excel and common statistical packages (SPSS, SAS, Stata, R), as well as a built-in project calendar, a scheduling module, ad hoc reporting tools, and advanced features, such as branching logic, file uploading, and calculated fields.

Learn more about REDCap by watching a brief summary video (4 min). If you would like to view other quick video tutorials of REDCap in action and an overview of its features, please see the Training Resources page.

Please note that any publication that results from a project utilizing REDCap should cite grant support (NIH CTSA UL1 TR000430).

NOTICE: If you are collecting data for the purposes of human subjects research, review and approval of the project is required by your Institutional Review Board.

If you require assistance or have any questions about REDCap, please contact University of Chicago REDCap Support.
CREATE A PROJECT

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: Training Demo
Title to be displayed on project webpage

Purpose of this project: Practice / Just for fun

Assign project to a Project Folder: 

Project notes (optional): training

Start project from scratch or begin with a template?
- Create an empty project (blank slate)
- Upload a REDCap project XML file (CDISC CDM format)
- Use a template (choose one below)

Choose a project template (comes pre-filled with fields, forms/surveys, and other settings)

<table>
<thead>
<tr>
<th>Template title (sorted by title)</th>
<th>Template description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic Demography</td>
<td>Contains a single data collection instrument to capture basic demographic information.</td>
</tr>
<tr>
<td>Classic Database</td>
<td>Contains six data entry forms, including forms for entry and baseline data, three monthly data forms, and a completion data form.</td>
</tr>
<tr>
<td>Human Cancer Tissue Biobank</td>
<td>Contains five data entry forms for collecting and tracking information for cancer tissue.</td>
</tr>
<tr>
<td>Longitudinal Database (1 arm)</td>
<td>Contains nine data entry forms (beginning with a demographic form) for collecting data longitudinally over eight different events.</td>
</tr>
<tr>
<td>Longitudinal Database (2 arms)</td>
<td>Contains nine data entry forms (beginning with a demographic form) for collecting data on two different arms (Drug A and Drug B) with each arm containing eight different events.</td>
</tr>
</tbody>
</table>

Create Project  Cancel
PROJECT SETUP STEPS
STEP 1: PROJECT SETUP

Main project settings
- Enable Use longitudinal data collection with repeating forms?
- Enable Use surveys in this project?

VIDEO: How to create and manage a survey
STEP 2: DATA COLLECTION INSTRUMENTS

Main project settings
- Use longitudinal data collection with repeating forms?
- Use surveys in this project?

Design your data collection instruments
Add or edit fields on your data collection instruments. This may be done by either using the Online Designer (online method) or by uploading a Data Dictionary (offline method), in which you may use either method or both. Quick links: Download PDF of all data collection instruments OR Download the current Data Dictionary.

Go to Online Designer or Data Dictionary.

You may also browse for pre-built data collection instruments in the REDCap Shared Library.

Have you checked the Check For Identifiers page to ensure all identifier fields have been tagged?
The Online Designer will allow you to make project modifications to fields and data collection instruments very easily using only your web browser. NOTE: While in development status, all field changes will take effect immediately in real time.

### Data Collection Instruments

<table>
<thead>
<tr>
<th>Instrument name</th>
<th>Fields</th>
<th>View PDF</th>
<th>Instrument actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Demographics</td>
<td>1</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Add new instrument:*
- **Create** a new instrument from scratch
- **Import** a new instrument from the official REDCap Shared Library
- **Upload** instrument ZIP file from another project/user or external libraries

*Add instrument here*
Ready to add fields

You may now begin adding fields to your data collection instrument below using the Online Designer. Alternatively, you may build your fields in the Data Dictionary (offline method) by clicking its tab above.

This module will allow you to create new data collection instruments/surveys or edit existing ones. Changes may be made by either using the Online Designer or Upload Data Dictionary (see tabs above), in which you may use either method or both. The Online Designer may help you get some initial fields/forms built quickly or to make quick edits, but using the Data Dictionary file may be more helpful if you will be adding a large number of fields for this project.

This page allows you to build and customize your data collection instruments one field at a time. You may add new fields or edit existing ones. New fields may be added by clicking the Add Field buttons. You can begin editing an existing field by clicking on the Edit icon. If you decide that you do not want to keep a field, you can simply delete it by clicking on the Delete icon. To reorder the fields, simply drag and drop a field to a different position within the form below. NOTE: While in development status, all field changes will take effect immediately in real time.

Current instrument: Demographics

Variable: record_id

Record ID

NOTE: The field above is the record ID field and thus cannot be deleted or moved. It can only be edited.
FIELD TYPES

Variable: record_id

Record ID

NOTE: The field above is the record ID field and thus cannot be deleted or moved. It can only be edited.

Add Field  Add Matrix of Fields

Add New Field

You may add a new project field to this data collection instrument by completing the fields below and clicking the Save button at the bottom. When you add a new field, it will be added to the form on this page. For an overview of the different field types available, you may view the Field Types video (4 min).

Field Type: --- Select a Type of Field ---
- Text Box (Short Text, Number, Date/Time, ...)
- Notes Box (Paragraph Text)
- Calculated Field
- Multiple Choice - Drop-down List (Single Answer)
- Multiple Choice - Radio Buttons (Single Answer)
- Checkboxes (Multiple Answers)
- Yes - No
- True - False
- Signature (draw signature with mouse or finger)
- File Upload (for users to upload files)
- Slider / Visual Analog Scale
- Descriptive Text (with optional Image/Video/Audio/File Attachment)
- Begin New Section (with optional text)
You may add a new project field to this data collection instrument by completing the fields below and clicking the Save button at the bottom. When you add a new field, it will be added to the form on this page. For an overview of the different field types available, you may view the Field Types video (4 min).

**Field Type:** Text Box (Short Text, Number, Date/Time, ...)

**Field Label:**

---

**Variable Name** (utilized during data export)

ONLY letters, numbers, and underscores

---

**Validation?** (optional)

--- None ---

---

**Enable searching within a biomedical ontology**

--- choose ontology to search ---

---

**Required?**

* Prompt if field is blank

---

**Identifier?**

---

**Custom Alignment**

Right / Vertical (RV)

---

**Field Note** (optional)

Small reminder text displayed underneath field

---

[Save] [Cancel]
### How often do you eat the following flavors of ice cream?

<table>
<thead>
<tr>
<th>Flavor</th>
<th>Never</th>
<th>Rarely</th>
<th>Sometimes</th>
<th>Often</th>
<th>Always</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chocolate</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Strawberry</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vanilla</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Butter Pecan</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mint Chocolate Chip</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Variable:** record_id

**Record ID**

NOTE: The field above is the record ID field and thus cannot be deleted or moved. It can only be edited.
MATRIX OF FIELDS

Add Matrix of Fields

You may add or edit a matrix (i.e. grid) of project fields on this data collection instrument by completing the fields below. By providing all necessary info below and clicking Save, the new matrix of fields will be added to the form on this page. A Field Label and Variable name must be provide for each field in the matrix and you must also set the Choices (i.e. matrix column headers) and answer format (Single Answer vs. Multiple Answers) for the entire matrix. View a matrix example or Read more about matrix fields on the Help & FAQ.

Matrix Header Text (optional)
How often do you eat the following flavors of ice cream?

Matrix Rows
Each row represents a different field with its own label and variable name.

<table>
<thead>
<tr>
<th>Field Label</th>
<th>Variable Name</th>
<th>Required?</th>
<th>Field Annotation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chocolate</td>
<td>choc</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Strawberry</td>
<td>straw</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vanilla</td>
<td>van</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Butter Pecan</td>
<td>butpec</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mint Chocolate Chip</td>
<td>mintce</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Add another row

Matrix Column Choices
Choices (one choice per line)
1. Never
2. Rarely
3. Sometimes
4. Often
5. Always

Other Matrix Info
Answer Format:
- Single Answer (Radio Buttons)

Ranking:
What is a ranked matrix of fields?
- Allow only 1 choice to be selected per column (radio buttons only)

Matrix group name: ONLY letters, numbers, and underscores
- icecream matrix

What is a matrix group name?

Save  Cancel
What is your favorite flavor of ice-cream?

- Chocolate
- Strawberry
- Vanilla
- Butter Pecan
- Mint Chocolate Chip

Check all that apply.
What is your favorite kind of ice cream?

- Chocolate
- Strawberry
- Vanilla
- Other

If other, please specify

Variable: other_text
Branching Logic may be employed when fields/questions need to be hidden under certain conditions. If branching logic is defined, the field will only be visible if the conditions provided are true (i.e., show the field only if...). You may specify those conditions in the text box below for the Advanced Branching Logic Syntax or by choosing the Drag-N-Drop Logic Builder method, which allows you to build your logic in a much easier fashion by simply dragging over the options you want. You may switch back and forth between each method if you wish, but please be aware that since the advanced logic allows for greater complexity, it may not be able to be switched over to the Drag-N-Drop method if it becomes too complex.

Choose method below for the following field: other_text - if other, please specify

- **Advanced Branching Logic Syntax**
  - Show the field ONLY if...

- OR -

- **Drag-N-Drop Logic Builder**
  - Displaying field choices for the following data collection instrument:
    - Form 1 Set Up As A Survey
  - Field choices from other fields (drag a choice below to box on right):
    - fav_icecream = Chocolate (1)
    - fav_icecream = Strawberry (2)
    - fav_icecream = Vanilla (3)
    - fav_icecream = Other (4)
    - icecream = Chocolate (1)
    - icecream = Strawberry (2)
    - icecream = Vanilla (3)
    - icecream = Other (4)
    - icecream_other = (define criteria)
  - Show the field ONLY if...
    - ALL below are true
    - ANY below are true
  - Drag and Drop
  - icecream = Other (4)

Save | Cancel
Without Piping:

What kind of ice cream do you like?
- Chocolate
- Strawberry
- Vanilla

How often do you eat ______ ice cream?
- Once a week
- Twice a week
- Three times a week

With Piping:

What kind of ice cream do you like?
- Chocolate
- Strawberry
- Vanilla

How often do you eat Chocolate ice cream?
- Once a week
- Twice a week
- Three times a week
PIPING LOGIC

You may add a new project field to this data collection instrument by completing the fields below and clicking the Save button at the bottom. When you add a new field, it will be added to the form on this page. For an overview of the different field types available, you may view the [Field Types video (4 min)](https://example.com/fieldtypes_video).

**Field Type:** Multiple Choice - Radio Buttons (Single Answer)

**Question Number (optional):** Displayed only on the survey page.

**Field Label:** How often do you eat [ice_cream] ice cream?

**Choices (one choice per line):**
1. Once a week
2. Twice a week
3. Three times a week

Looking for Branching Logic? Try clicking the ⬇️ icon for this field after clicking the Save or Cancel button below.
STEP 3: OPTIONAL MODULES & CUSTOMIZATIONS

Enable optional modules and customizations

- Auto-numbering for records
- Scheduling module (longitudinal only)
- Randomization module
- Designate an email field to use for invitations to survey participants

Additional customizations
### STEP 4: PROJECT BOOKMARKS

**Set up project bookmarks (optional)**

You may create custom bookmarks to webpages that exist inside or outside of REDCap. These bookmarks will be seen as links on the left-hand project menu and can be accessed at any time by users who are given privileges to do so. Every project bookmark has custom settings that allow one to control its appearance and behavior.

**Go to** [Add or edit bookmarks](#)

**Table:**

<table>
<thead>
<tr>
<th>Link #</th>
<th>Link Label</th>
<th>Link URL / Destination</th>
<th>Link Type</th>
<th>User Access</th>
<th>Opens new window</th>
<th>Append record info to URL</th>
<th>Append project ID to URL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add</td>
<td>Asthma Center</td>
<td><a href="http://asthma.bsd.uchicago.edu/">http://asthma.bsd.uchicago.edu/</a></td>
<td>Simple Link</td>
<td>All users</td>
<td>✔</td>
<td>□</td>
<td>□</td>
</tr>
</tbody>
</table>

Enter the label for the link as it is seen on the left-hand menu. Enter the web address (URL) for the link (e.g., [http://www.mysite.com/mypage.html](http://www.mysite.com/mypage.html)).
STEP 5: USER RIGHTS

This page may be used for granting users access to this project and for managing the user privileges of those users. You may also create roles to which you may assign users (optional). User roles are useful when you will have several users with the same privileges because they allow you to easily add many users to a role in a much faster manner than setting their user privileges individually. Roles are also a nice way to categorize users within a project. In the box below you may add/assign users or create new roles, and the table at the bottom allows you to make modifications to any existing user or role in the project, as well as view a glimpse of their user privileges.

Add new users: Give them custom user rights or assign them to a role.

- Add new user
- Assign new user

Create new roles: Add new user roles to which users may be assigned.

- Enter new role name
- Create role
STEP 5: USER RIGHTS

Basic Rights

- Expiration Date
  (if applicable)

Highest level privileges:
- Project Design and Setup
- User Rights
- Data Access Groups

Privileges for data exports (including PDFs and API exports), reports and stats:
- Data Exports
  - De-Identified means that all free-text fields will be removed, as well as any data/time fields and identifier fields.
- Add/Edit Reports
  - Also allows user to view ALL reports (but not necessarily all data in the reports)
- Stats & Charts

Other privileges:
- Manage Survey
- Participants
- Calendar
- Data Import Tool
- Data Comparison Tool
- Logging
- File Repository
- Data Quality
  - Data Quality
  - API
  - What is the REDCap API?

Data Entry Rights

NOTE: The data entry rights “only” pertain to a user’s ability to view or edit data on a web page in REDCap (e.g., data entry forms, reports). It has no effect on data imports or data exports.

<table>
<thead>
<tr>
<th>Data Entry Rights</th>
<th>No Access</th>
<th>Read Only</th>
<th>View &amp; Edit</th>
<th>Edit survey responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Form 1 Set Up As A Survey (survey)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Formatting Fun (survey)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

New User Notification

- Notify user of their project access via email?

Add user  Cancel
STEP 6: TEST YOUR PROJECT

Test your project thoroughly

It is important to test the essential components of your project before moving it into production. Try creating a few test records and entering some data for each to ensure that your data collection instruments look and behave how you expect, especially branching logic and calculations. Then review your test data by creating reports and exporting your data to view in Excel or a statistical analysis package. If you have surveys, complete the surveys as if you were a participant by using the Public Survey Link or Participant List by sending a survey invitation to yourself. If other project modules will be used regularly, test them out a bit too. The best way to test your project is to use it as if you were entering real production data, and it is always helpful to have colleagues (especially team members) take a look at your project to get a fresh set of eyes looking at it.
STEP 7: MOVE TO PRODUCTION

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 then need to be approved by a REDCap administrator before taking effect.

Go to Move project to production
**PROJECT TIMELINE AND MODES**

- **Draft Protocol**
  - Development Mode
    - Build and test a project
    - TEST DATA
  - *Draft Protocol Amendment*

- **Final Protocol**
  - Production Mode
    - Enter and review data
    - REAL DATA
  - Draft Mode
    - Update project setup
    - REAL DATA CONTINUES

- **Inactive Mode**
  - View and analyze data
  - NO DATA ENTRY

- ** Archived Mode**
  - Project is closed
  - DATA ANALYSIS FINALIZED

*if IRB approval required*
Live Demo
Using Surveys
ENABLING SURVEYS

Step 1:

Step 2:
SURVEY SETTINGS

Set up my survey for data collection instrument "Ice Cream Survey"

Basic Survey Options:

Survey Title

Ice Cream Survey
Title to be displayed to participants at the top of the survey page

Survey Instructions
(Displayed at top of survey after title)

Please complete the survey below.
Thank you!

How to use Piping here
Survey Design Options:

- **Logo** (Optional: display an image above the survey title)
  - Add new logo: [Browse...]
  - If using a logo, hide survey title on survey page?

- **Size of survey text**: Normal

- **Font of survey text**: Arial

- **Survey theme**:
  - University of Chicago
  - Customize

Survey design preview (sample survey):

This is the survey title

Your survey instructions will go here. The instructions can tell your survey participant about the purpose of the survey and what you would like them to do once they have completed the survey. Below is a listing of various question types that might be displayed on your survey.

This is a section header to divide the survey page into sections.

What is your first name?

What days of the week do you work? (check all that apply)
Survey Customizations:

### Question Numbering

- Auto numbered

### Question Display Format

- All on one page
- Display page numbers at top of survey page
- Hide the 'Previous Page' button (i.e., Back button) on the survey page (prevents respondents from going back to previous pages)

### For 'Required' fields, display the red 'must provide value' text on the survey page?

- Yes

If 'No', then it will NOT display the following text beneath all 'Required' fields: *must provide value

### Allow survey respondents to view aggregate survey results after completing the survey?

After completing the survey, participants can view ALL responses in aggregate graphical format and/or as descriptive statistics. Also, the individual respondent's answers will be highlighted in the results.

### Text-To-Speech functionality

(Allows text on survey page to be read audibly to participants.)

When enabled, icons will be displayed next to all text on the survey page, and when clicked, the text will be read out loud to the participant (must have computer speakers turned on).

### Additional settings:

- Minimum number of responses required before participants are allowed to view aggregate data (recommended = 10).
- Do not show plots for questions lacking diversity in response values? (What does this mean?)

![Disabled](DISABLED)

Notice: All text that is spoken is sent to a service hosted at Vanderbilt University that utilizes the AT&T Text-to-Speech API service. Be advised that if the survey utilizes piping, for privacy concerns, data piped from identifier fields will *not* be sent to the service with the rest of the text but will instead be redacted.

Super users: How to disable this feature
SURVEY ACCESS

Survey Access:

Survey Expiration (optional)
(Time after which the survey will become inactive.)

The time must be for the time zone America/Chicago, in which the current time is 08/11/2016 13:18.

Allow 'Save & Return Later' option for respondents?
(Allow respondents to leave the survey and return later.)

No

Allow respondents to return and modify completed responses?
Survey Termination Options:

- **(Optional) Auto-continue to next survey:** Automatically start the next survey instrument after finishing this survey.
- **Redirect to a URL:**
  Provide a full URL, e.g., http://www.example.com/mypage.html
  - [How to use Piping here](#)
- **Survey Completion Text:**
  - Thank you for taking the survey.
  - Have a nice day!
  - [How to use Piping here](#)
- **Send confirmation email (optional):**
  - Email the respondent when they complete the survey.
  - [How to use Piping here](#)

[Save Changes]
Using a public survey link is the simplest and fastest way to collect responses for your survey. You may obtain the survey link below to email it to your participants. Responses will be collected anonymously (unless the survey contains questions asking for identifying data from the participant). **NOTE:** Since this method uses a single survey link for all participants, it allows for the possibility of participants taking the survey multiple times, which may be necessary in some cases.

To obtain the survey link, copy the URL below and paste it into the body of an email message in your own email client. Your email recipient(s) can then click the link to begin taking your survey. [Get shorter survey link](https://redcap.uchicago.edu/surveys/?s=8v66iUVcga) or [Get embed code to place link on a webpage](http://f.mp/1HLs7Yi).

**Public Survey URL:**
https://redcap.uchicago.edu/surveys/?s=8v66iUVcga

**OR**

**Short Public Survey URL:**
http://f.mp/1HLs7Yi

Copy the HTML in the text box below to place it within the HTML code of any webpage. It will show up as a link on that webpage so that anyone can easily click the link to begin taking your survey.

**Embed HTML code < >**

```html
<a href="https://redcap.uchicago.edu/surveys/?s=8v66iUVcga..." Copy to clipboard
```

[Open public survey](javascript:openSurvey("https://redcap.uchicago.edu/surveys/?s=8v66iUVcga..."))

[Send me URL via email](javascript:sendURL("https://redcap.uchicago.edu/surveys/?s=8v66iUVcga..."))
### Manage Survey Participants

The Participant List option allows you to send a customized email to anyone in your list and track who responds to your survey. It is also possible to identify an individual’s survey answers, if desired, by providing an Identifier for each participant (this feature must first be enabled by clicking the 'Enable' button in the table below). Unless an Identifier is used, all survey responses collected are considered anonymous. [More details]

#### Participant List belonging to [Initial survey] "Pre Screening Survey"

<table>
<thead>
<tr>
<th>Email</th>
<th>Participant Identifier (optional)</th>
<th>Link</th>
<th>Invitation Scheduled?</th>
<th>Invitation Sent?</th>
<th>Responded?</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="mailto:arodri1g@bsd.uchicago.edu">arodri1g@bsd.uchicago.edu</a></td>
<td>Alex Rodriguez</td>
<td></td>
<td>-</td>
<td>-</td>
<td></td>
</tr>
<tr>
<td><a href="mailto:braumann@bsd.uchicago.edu">braumann@bsd.uchicago.edu</a></td>
<td>Bonnie Trumann</td>
<td></td>
<td>-</td>
<td>-</td>
<td></td>
</tr>
<tr>
<td><a href="mailto:braumann@ci.uchicago.edu">braumann@ci.uchicago.edu</a></td>
<td>Brenda Starr</td>
<td></td>
<td>-</td>
<td>-</td>
<td></td>
</tr>
<tr>
<td><a href="mailto:brigitte_raumann@yahoo.com">brigitte_raumann@yahoo.com</a></td>
<td>Brigitte Raumann</td>
<td></td>
<td>-</td>
<td>-</td>
<td></td>
</tr>
<tr>
<td><a href="mailto:democreat@gmail.com">democreat@gmail.com</a></td>
<td>Derrick Moore</td>
<td></td>
<td>-</td>
<td>-</td>
<td></td>
</tr>
<tr>
<td><a href="mailto:jmtaylor@yahoo.com">jmtaylor@yahoo.com</a></td>
<td>Jim Taylor</td>
<td></td>
<td>-</td>
<td>-</td>
<td></td>
</tr>
<tr>
<td><a href="mailto:john.williams@hotmail.com">john.williams@hotmail.com</a></td>
<td>John Williams</td>
<td></td>
<td>-</td>
<td>-</td>
<td></td>
</tr>
<tr>
<td><a href="mailto:kec@bsd.uchicago.edu">kec@bsd.uchicago.edu</a></td>
<td>Kevin Le</td>
<td></td>
<td>-</td>
<td>-</td>
<td></td>
</tr>
<tr>
<td><a href="mailto:nbaer@bsd.uchicago.edu">nbaer@bsd.uchicago.edu</a></td>
<td>Neil Batroos</td>
<td></td>
<td>-</td>
<td>-</td>
<td></td>
</tr>
<tr>
<td><a href="mailto:putnamtr@gmail.com">putnamtr@gmail.com</a></td>
<td>ID 4830-72</td>
<td></td>
<td>-</td>
<td>-</td>
<td></td>
</tr>
</tbody>
</table>
About Testing...

1. Testing is **CRITICAL**!

2. To test your survey, send a link to yourself in the same method as you plan to send a link to a respondent.

3. Take your survey a few times to make sure the instructions, format, and termination options work as needed. Your experience in Development mode is exactly the same as your participants’ experience in Production mode.

4. Once testing is complete, request the project be moved to production.
Live Demo
Applications & Tools
Record Status Dashboard (all records)

Displayed below is a table listing all existing records/responses and their status for every data collection instrument (and if longitudinal, for every event). You may click any of the colored buttons in the table to open a new tab window in your browser to view that record or that particular data collection instrument. Please note that if your form-level user privileges are restricted for certain data collection instruments, you will only be able to view those instruments, and if you belong to a Data Access Group, you will only be able to view records that belong to your group.

Displaying record “1” through “5” of 5 records

Displaying: Instrument status only | Lock status only | All status types

<table>
<thead>
<tr>
<th>Study Id</th>
<th>Ice Cream Survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>✔</td>
</tr>
<tr>
<td>2</td>
<td>✔</td>
</tr>
<tr>
<td>3</td>
<td>✔</td>
</tr>
<tr>
<td>4</td>
<td>✔</td>
</tr>
<tr>
<td>5</td>
<td>✔</td>
</tr>
</tbody>
</table>

Legend for status icons:
- Incomplete
- Incomplete (no data saved)
- Unverified
- Partial Survey Response
- Complete
- Completed Survey Response
**PROJECT CHANGE LOG**

### Logging

This module lists all changes made to this project, including data exports, data changes, and the creation or deletion of users.

<table>
<thead>
<tr>
<th>Time / Date</th>
<th>Username</th>
<th>Action</th>
<th>List of Data Changes OR Fields Exported</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/26/2015 2:38pm</td>
<td>jahotenga</td>
<td>Created Record 1</td>
<td>visit_date = '2015-04-27', daily_medication_list = 'Tylenol', email_address = '<a href="mailto:wteachou@cmh.edu">wteachou@cmh.edu</a>', county(3) = checked, diabetes_indicator = '0', diabetes_di = '0', participant_signature = '16975', signed_consent_form = '16976', demographics_complete = '2', record_id = '2'</td>
</tr>
<tr>
<td>04/26/2015 2:38pm</td>
<td>[survey respondent]</td>
<td>Created Response 1</td>
<td>visit_date = '2015-04-26', daily_medication_list = 'None', email_address = '<a href="mailto:jahotenga@cmh.edu">jahotenga@cmh.edu</a>', county(1) = checked, diabetes_indicator = '0', diabetes_di = '0', participant_signature = '16973', signed_consent_form = '16974', record_id = '1', demographics_complete = '2'</td>
</tr>
<tr>
<td>04/25/2015 2:37pm</td>
<td>jahotenga</td>
<td>Manage/Design</td>
<td>Set up survey</td>
</tr>
<tr>
<td>04/25/2015 2:36pm</td>
<td>jahotenga</td>
<td>Manage/Design</td>
<td>Modify project settings</td>
</tr>
<tr>
<td>04/25/2015 2:29pm</td>
<td>jahotenga</td>
<td>Manage/Design</td>
<td>Modify project settings</td>
</tr>
<tr>
<td>04/25/2015 1:26pm</td>
<td>jahotenga</td>
<td>Manage/Design</td>
<td>Modify project settings</td>
</tr>
<tr>
<td>04/25/2015 1:47pm</td>
<td>jahotenga</td>
<td>Manage/Design</td>
<td>Create project field</td>
</tr>
<tr>
<td>04/25/2015 1:45pm</td>
<td>jahotenga</td>
<td>Manage/Design</td>
<td>Rename project fields</td>
</tr>
<tr>
<td>04/25/2015 1:45pm</td>
<td>jahotenga</td>
<td>Manage/Design</td>
<td>Create project field</td>
</tr>
<tr>
<td>04/25/2015 1:23pm</td>
<td>jahotenga</td>
<td>Manage/Design</td>
<td>Create project field</td>
</tr>
<tr>
<td>04/25/2015 1:21pm</td>
<td>jahotenga</td>
<td>Manage/Design</td>
<td>Create project field</td>
</tr>
<tr>
<td>04/25/2015 1:12pm</td>
<td>jahotenga</td>
<td>Manage/Design</td>
<td>Edit project field</td>
</tr>
</tbody>
</table>
### Data Exports, Reports, and Stats

**Create New Report**  
**My Reports & Exports**  
**PDF & Other Export Options**

This module allows you to easily view reports of your data, inspect plots and descriptive statistics of your data, as well as export your data to Microsoft Excel, SAS, Stata, R, or SPSS for analysis (if you have such privileges). If you wish to export your “entire” data set or view it as a report, then Report A is the best and quickest way. However, if you want to view or export data from only specific instruments (or events) on the fly, then Report B is the best choice. You may also create your own custom reports below (if you have such privileges) in which you can filter the report to specific fields, records, or events using a vast array of filtering tools to make sure you get the exact data you want. Once you have created a report, you may view it as a webpage, export it out of REDCap in a specified format (Excel, SAS, Stata, SPSS, R), or view the plots and descriptive statistics for that report.

### My Reports & Exports

<table>
<thead>
<tr>
<th>Report name</th>
<th>View/Export Options</th>
<th>Management Options</th>
<th>Report ID</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>A</strong> All data (all records and fields)</td>
<td><img src="image1" alt="View Report" />  <img src="image2" alt="Export Data" />  <img src="image3" alt="Stats &amp; Charts" /></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>B</strong> Selected instruments (all records)</td>
<td><img src="image4" alt="Make custom selections" /></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

+ Create New Report
DATA EXPORTS, REPORTS, AND STATS

Choose export format

- CSV / Microsoft Excel (raw data)
- CSV / Microsoft Excel (labels)
- SPSS Statistical Software
- SAS Statistical Software
- R Statistical Software
- STATA Statistical Software

De-identification options (optional)

The options below allow you to limit the amount of sensitive information that you are exporting out of the project. Check all that apply.

Known identifiers:
- Remove all tagged Identifier fields (tagged in Data Dictionary)
- Hash the Record ID field (converts record name to an unrecognizable value)

Free-form text:
- Remove unvalidated Text fields (i.e. Text fields other than dates, numbers, etc.)
- Remove Notes/Essay box fields

Date and datetime fields:
- Remove all data and datetime fields
  — OR —
- Shift all dates by value between 0 and 364 days (shifted amount determined by algorithm for each record)

Deselect all options

Export Data  Cancel
<table>
<thead>
<tr>
<th>#</th>
<th>Variable / Field Name</th>
<th>Field Label</th>
<th>Field Attributes (Field Type, Validation, Choices, Calculations, etc.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>study_id</td>
<td>Study ID</td>
<td>text</td>
</tr>
<tr>
<td>2</td>
<td>date_enrolled</td>
<td>Section Header: Consent Information Date subject signed consent YYY-MM-DD</td>
<td>text (date_ymd)</td>
</tr>
<tr>
<td>3</td>
<td>patient_document</td>
<td>Upload the patient’s consent form</td>
<td>file</td>
</tr>
<tr>
<td>4</td>
<td>first_name</td>
<td>Section Header: Contact Information First Name</td>
<td>text, Identifier</td>
</tr>
<tr>
<td>5</td>
<td>last_name</td>
<td>Last Name</td>
<td>text, Identifier</td>
</tr>
<tr>
<td>6</td>
<td>address</td>
<td>Street, City, State, ZIP</td>
<td>notes, Identifier</td>
</tr>
<tr>
<td>7</td>
<td>telephone</td>
<td>Phone number Include Area Code</td>
<td>text (phone), Identifier</td>
</tr>
<tr>
<td>8</td>
<td>email</td>
<td>E-mail</td>
<td>text (email), Identifier</td>
</tr>
<tr>
<td>9</td>
<td>dob</td>
<td>Section Header: Demographics Date of birth</td>
<td>text (date_ymd), Identifier</td>
</tr>
<tr>
<td>10</td>
<td>age</td>
<td>Age (years)</td>
<td>calc Calculation: rounddown(datediff(dob),today(),'y'))</td>
</tr>
<tr>
<td>11</td>
<td>ethnicity</td>
<td>Ethnicity</td>
<td>radio</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Custom alignment: LH</td>
</tr>
<tr>
<td></td>
<td></td>
<td>0 Hispanic or Latino</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>1 NOT Hispanic or Latino</td>
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</tr>
<tr>
<td></td>
<td></td>
<td>2 Unknown / Not Reported</td>
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</tr>
<tr>
<td>12</td>
<td>race</td>
<td>Race</td>
<td>dropdown</td>
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<td></td>
<td></td>
<td>Custom alignment: LH</td>
</tr>
<tr>
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<td></td>
<td>1 Asian</td>
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</tr>
<tr>
<td></td>
<td></td>
<td>2 Native Hawaiian or Other Pacific Islander</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>3 Black or African American</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>4 White</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>5 More Than One Race</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>6 Unknown / Not Reported</td>
<td></td>
</tr>
</tbody>
</table>
FILE REPOSITORY

This page may be used for storing and retrieving files and documents used for this project. You may upload files here to save for retrieval later, or you may download previously uploaded files in the file list below. Whenever a data export is performed, the resulting data and syntax files are stored here also.

<table>
<thead>
<tr>
<th>File</th>
<th>Filter by file type:</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>IRB Protocol current</td>
<td>ALL</td>
<td></td>
</tr>
<tr>
<td>File name: IRB49857479_Protocol.docx</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date uploaded: 07/27/2010</td>
<td></td>
<td></td>
</tr>
<tr>
<td>File size: 9.7 KB</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Consent Form</td>
<td>ALL</td>
<td></td>
</tr>
<tr>
<td>File name: Consent_Form_IRB49857479.docx</td>
<td></td>
<td></td>
</tr>
<tr>
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<td></td>
<td></td>
</tr>
<tr>
<td>File size: 9.7 KB</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Welcome to REDCap!

REDCap is a mature, secure web application for building and managing online surveys and databases. Using REDCap's stream-lined process for rapidly developing projects, you may create and design projects using 1) the online method from your web browser using the Online Designer; and/or 2) the offline method by constructing a ‘data dictionary’ template file in Microsoft Excel, which can be later uploaded into REDCap. Both surveys and databases (or a mixture of the two) can be built using these methods.

REDCap provides automated export procedures for seamless data downloads to Excel and common statistical packages (SPSS, SAS, Stata, R), as well as a built-in project calendar, a scheduling module, ad hoc reporting tools, and advanced features, such as branching logic, file uploading, and calculated fields.

Learn more about REDCap by watching a brief summary video (4 min). If you would like to view other quick video tutorials of REDCap in action and an overview of its features, please see the Training Resources page.

Please note that any publication that results from a project utilizing REDCap should cite grant support (NIH CTSA UL1 TR000430).

NOTICE: If you are collecting data for the purposes of human subjects research, review and approval of the project is required by your Institutional Review Board.

If you require assistance or have any questions about REDCap, please contact REDCap Support.
Live Demo
Wrap Up
HELP RESOURCES

Blue Button

Email

Website

Help Tab

• redcap@rt.cri.uchicago.edu

• https://cri.uchicago.edu/redcap
Additional Help

The CRI offers an array of online resources to help you use REDCap better.

Here you’ll find:

- training videos
- training manuals
- advanced features
- quick tips
- frequently asked questions

WEBSITE: cri.uchicago.edu/redcap-training/

NEED ADDITIONAL HELP?

If you have any further questions about using REDCap’s features or are still unsure how best to design your project, the CRI’s REDCap Administrator will gladly schedule a working session with you, free of charge.

SCHEDULE A SESSION
FUTURE SEMINARS

APRIL 4th
• Making the Most of REDCap: Beyond Basic Skills

JULY 11th
• Making the Most of REDCap: All About Surveys

REGISTER
• https://cri.uchicago.edu/seminar-series/
Questions?
THANK YOU!