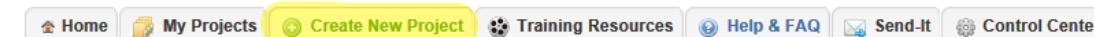


# CREATE A PROJECT



## 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:**

Title to be displayed on project webpage

**Purpose of this project:**

*How will it be used?*

**Assign project to a Project Folder?**

**Project notes (optional):**

*Comments describing the project's use or purpose for documentation purposes only.*

**Start project from scratch or begin with a template?**

- Create an empty project (blank slate)
- Upload a REDCap project XML file (CDISC ODM format) [?](#)
- Use a template (choose one below)

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

[Add templates \(super users only\)](#)

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

# PROJECT SETUP STEPS

Project status:  Development      Completed steps 0 of 7

**Main project settings**

 In progress       Use longitudinal data collection with repeating forms? [?](#)  
 Use surveys in this project? [?](#)       [VIDEO: How to create and manage a survey](#)

[I'm done!](#)      [Modify project title, purpose, etc.](#)

**Design your data collection instruments**

 In progress      [I'm done!](#)

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?

**Enable optional modules and customizations**

 Optional      [I'm done!](#)

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

[Additional customizations](#)

**Set up project bookmarks (optional)**

 Optional      [I'm done!](#)

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](#)

**User Rights and Permissions**

 Optional      [I'm done!](#)

You may grant other users access to this project or edit the user privileges of current users on this project by navigating to the User Rights page. Additionally, if you wish to limit user access to certain records/responses for this project, you may want to use Data Access Groups, in which only users within a given Data Access Group can access records created by users within that group.

Go to [User Rights](#) or [Data Access Groups](#)

**Test your project thoroughly**

 Not started      [I'm done!](#)

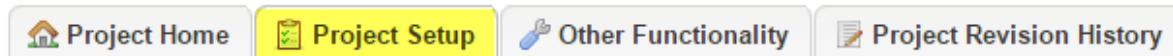
It is important to test the essential components of your project before moving it into production. Try creating a few test records and data for each of the instruments in your project. Make sure they look and behave how you expect, especially branching logic and calculations. Then review your test data 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.

**Move your project to production status**

 Not started      [Move project to production](#)

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.

# → STEP 1: PROJECT SETUP



Project status: Development

Completed steps **0 of 7**

Not started

Use longitudinal data collection with repeating forms? [?](#)

Use surveys in this project? [?](#) [VIDEO: How to create and manage a survey](#)

[Modify project title, purpose, etc.](#)

### Main project settings

# → STEP 2: DATA COLLECTION INSTRUMENTS

Project status:  Development      Completed steps **1 of 7**

**Main project settings**

 **Complete!**  
[Not complete?](#)

Use longitudinal data collection with repeating forms? [?](#)

Use surveys in this project? [?](#)       [VIDEO: How to create and manage a survey](#)

[Modify project title, purpose, etc.](#)

**Design your data collection instruments**

 **Not started**  
[I'm done!](#)

Go to [!\[\]\(bb7d30538f2dfd629b893033401c9a1c\_img.jpg\) Online Designer](#) or [!\[\]\(62858d4247555be7beae258ecdaf2710\_img.jpg\) 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?

# ONLINE DESIGNER

[Project Setup](#)[Online Designer](#)[Data Dictionary](#)[VIDEO: How to use this page](#)

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**

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](#) [?](#)

Instrument name	Fields	View PDF	Instrument actions
Demographics	1	<a href="#">Edit</a>	<a href="#">Choose action</a> <a href="#">?</a>

[Add instrument here](#)

# RECORD IDENTIFIER

[Project Home](#)[Project Setup](#)[Online Designer](#)[Data Dictionary](#)[VIDEO: How to use this page](#)

## 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.

[Return to list of instruments](#)

Current instrument: **Demographics**

[Preview instrument](#) 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](#)

# 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)

# FIELD DESIGN

**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:**

**Field Label** [How to use Piping](#)

**Variable Name** (utilized during data export)  
  Enable auto naming of variable based upon its Field Label?

**Validation?** (optional)    
— OR —

**Enable searching within a biomedical ontology**  -- choose ontology to search --

**Required?**\*  No  Yes  
\* prompt if field is blank

**Identifier?**  No  Yes  
Does the field contain identifying information (e.g., name, SSN, address)?

**Custom Alignment**    
Align the position of the field on the page

**Field Note** (optional)   
Small reminder text displayed underneath field

# MATRIX OF FIELDS

How often do you eat the following flavors of ice cream?

	Never	Rarely	Sometimes	Often	Always	
Chocolate	<input type="radio"/> (H) <input type="radio"/>	<input type="radio"/>				
Strawberry	<input type="radio"/> (H) <input type="radio"/>	<input type="radio"/>				
Vanilla	<input type="radio"/> (H) <input type="radio"/>	<input type="radio"/>				
Butter Pecan	<input type="radio"/> (H) <input type="radio"/>	<input type="radio"/>				
Mint Chocolate Chip	<input type="radio"/> (H) <input type="radio"/>	<input type="radio"/>				

 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](#)

# 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.

Field Label	Variable Name	Required?*	Field Annotation
Chocolate	choc	<input type="checkbox"/>	<input type="text"/>
Strawberry	straw	<input type="checkbox"/>	<input type="text"/>
Vanilla	van	<input type="checkbox"/>	<input type="text"/>
Butter Pecan	butpec	<input type="checkbox"/>	<input type="text"/>
Mint Chocolate Chip	mintcc	<input type="checkbox"/>	<input type="text"/>

Enable auto naming of variable based upon its Field Label?

**Field Label**

**Variable Name**  
ONLY letters, numbers, and underscores

**Required?\***

**Field Annotation**

**Add another row**

**Matrix Column Choices**

**Choices (one choice per line)**

- 1, Never
- 2, Rarely
- 3, Sometimes
- 4, Often
- 5, Always

How do I manually code the choices?

**Other Matrix Info**

**Answer Format:**

**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  
 What is a matrix group name?

**Save** **Cancel**

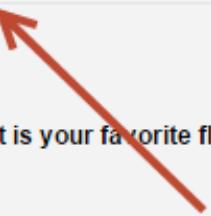
# EDIT/COPY/MOVE/DELETE FIELDS

Variable: favorite\_ice\_cream

What is your favorite flavor of ice-cream?

Chocolate  
 Strawberry  
 Vanilla  
 Butter Pecan  
 Mint Chocolate Chip

[Check all that apply](#)



# ↳ BRANCHING LOGIC

What is your favorite kind of ice cream?

- Chocolate
- Strawberry
- Vanilla
- Other

[reset](#)

     Variable: other\_text

If other, please specify

# ↳ BRANCHING LOGIC

**>Add/Edit Branching Logic**

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** [\(How do I use the advanced syntax?\)](#)

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)

Drag and Drop

Show the field ONLY if...

ALL below are true  
 ANY below are true

icecream = Other (4)

Clear logic

Save Cancel

# → PIPING LOGIC

## Without Piping:

What kind of ice cream do you like?

- (H) Chocolate
- (S) Strawberry
- (V) Vanilla

reset

How often do you eat \_\_\_\_\_ ice cream?

- (H) Once a week
- (S) Twice a week
- (V) Three times a week

reset

## With Piping:

What kind of ice cream do you like?

- (H) Chocolate
- (S) Strawberry
- (V) Vanilla

reset

How often do you eat **Chocolate** ice cream?

- (H) Once a week
- (S) Twice a week
- (V) Three times a week

reset

# PIPING LOGIC

The screenshot illustrates the use of piping logic in a survey form editor. On the left, the survey structure is shown with two fields defined:

- Field 1:** "What kind of ice cream do you like?" (Variable: ice\_cream). It contains three radio button options: Chocolate, Strawberry, and Vanilla.
- Field 2:** "How often do you eat [ice\_cream] ice cream?" (Variable: icecream\_often). It contains three radio button options: Once a week, Twice a week, and Three times a week.

A red arrow points from the "ice\_cream" variable label in the first field to the "ice\_cream" variable label in the second field, indicating the piping relationship.

On the right, the "Edit Field" dialog for the second field is open, showing the configuration for "icecream\_often". The "Field Label" is set to "How often do you eat [ice\_cream] ice cream?". The "Choices" section lists the options: 1. Once a week, 2. Twice a week, 3. Three times a week.

The dialog includes various configuration options:

- Field Type:** Multiple Choice - Radio Buttons (Single Answer)
- Question Number (optional):** [ ]
- Field Label:** How often do you eat [ice\_cream] ice cream? (with a "How to use Piping" link)
- Choices (one choice per line):** 1. Once a week  
2. Twice a week  
3. Three times a week
- Variable Name (utilized during data export):** icecream\_often
- Required?\***  No  Yes
- Identifier?**  No  Yes
- Custom Alignment:** Right / Vertical (RV)
- Field Note (optional):** [ ]
- Save** and **Cancel** buttons

A note at the bottom of the dialog says: "Looking for Branching Logic? Try clicking the icon for this field after clicking the Save or Cancel button below."

# → STEP 3: OPTIONAL MODULES & CUSTOMIZATIONS

 Optional

**Enable optional modules and customizations**

<input type="button" value="Enable"/>	<input checked="" type="checkbox"/> Auto-numbering for records <a href="#">?</a>
<input type="button" value="Enable"/>	<input checked="" type="checkbox"/> Scheduling module (longitudinal only) <a href="#">?</a>
<input type="button" value="Enable"/>	<input checked="" type="checkbox"/> Randomization module <a href="#">?</a>
<input type="button" value="Enable"/>	<input checked="" type="checkbox"/> Designate an email field to use for invitations to survey participants <a href="#">?</a>

# STEP 4: PROJECT BOOKMARKS

 Optional

[I'm done!](#)

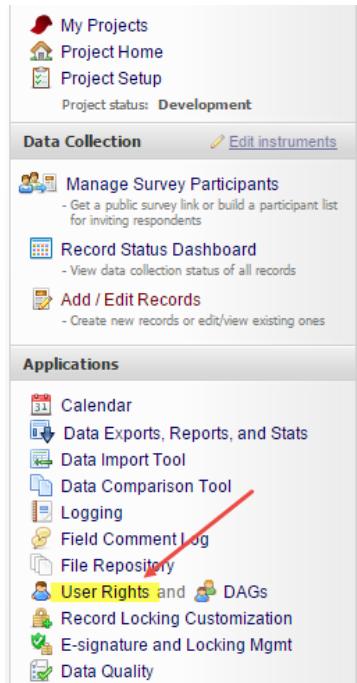
**Set up project bookmarks (optional)**

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](#)

Link #	Link Label	Link URL / Destination	Link Type	User Access	Opens new window	Append record info to URL 	Append project ID to URL 
<a href="#">Add</a>	Asthma Center Enter the label for the link as it is seen on the left-hand menu	http://asthma.bsd.uchicago.edu/ Enter the web address (URL) for the link (e.g., http://www.mysite.com/mypage.html)	Simple Link 	<input checked="" type="radio"/> All users <input type="radio"/> Selected users	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# STEP 5: USER RIGHTS



The screenshot shows the 'Project Home' interface for a project titled 'General Testing I'. The left sidebar contains a 'Data Collection' section with 'Manage Survey Participants', 'Record Status Dashboard', and 'Add / Edit Records' options. The 'Applications' section includes 'Calendar', 'Data Exports, Reports, and Stats', 'Data Import Tool', 'Data Comparison Tool', 'Logging', 'Field Comment Log', 'File Repository', 'User Rights' (which is highlighted with a red arrow), 'DAGs', 'Record Locking Customization', 'E-signature and Locking Mgmt', and 'Data Quality'.

**General Testing I**

**Project Home**

Project status:  Development

Main  
In progress

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.

— OR —

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

(e.g., Project Manager, Data Entry Person)

# STEP 5: USER RIGHTS

	No Access	Read Only	View & Edit	Edit survey responses
Form 1 Set Up As A Survey (survey)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>
Formatting Fun (survey)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>

**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  No Access  De-identified\*  Remove all tagged Identifier fields  Full Data Set  
\* De-identified means that all free-form text fields will be removed, as well as any date/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  Create & edit rules  
[What is Data Quality?](#)  Execute rules  
 API  API Export  
[What is the REDCap API?](#)  API Import

**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.*

**New User Notification**

Notify user of their project access via email?

**Add user** **Cancel**

# ► STEP 6: TEST YOUR PROJECT



Complete!

[Not complete?](#)

## 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

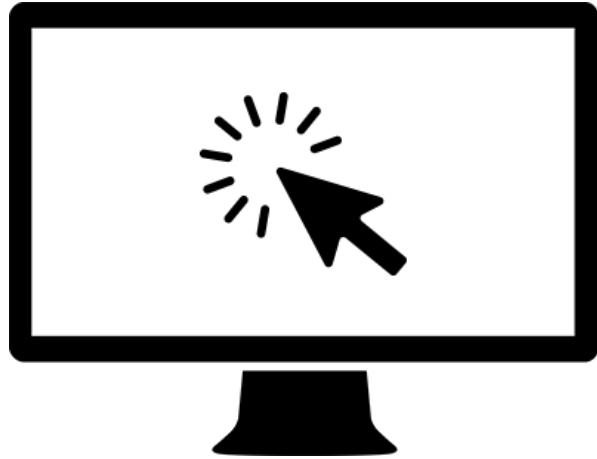


Not started

## 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](#)



# Live Demo



# Using Surveys