

INTRODUCTION TO



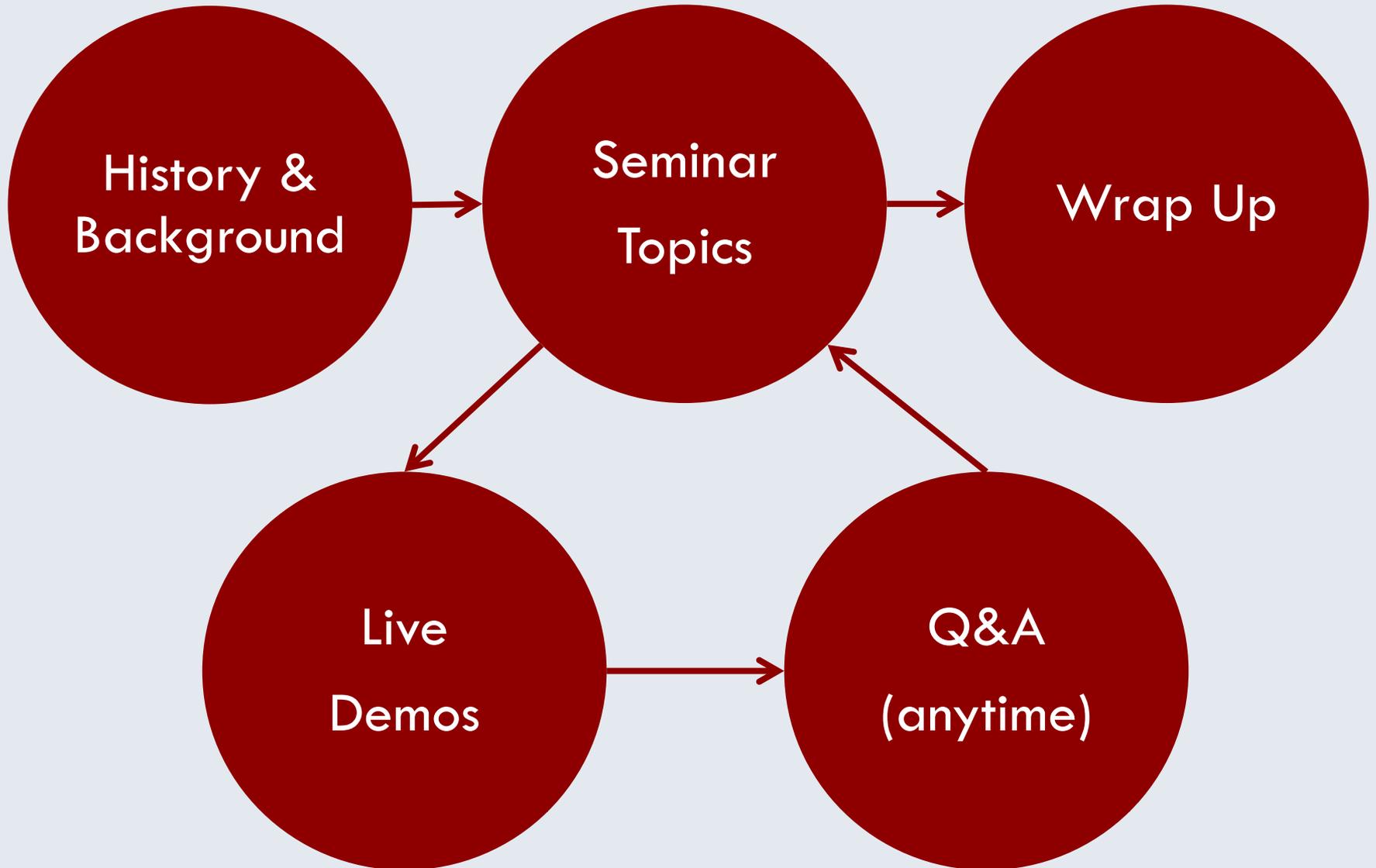
THE UNIVERSITY OF
CHICAGO MEDICINE &
BIOLOGICAL SCIENCES

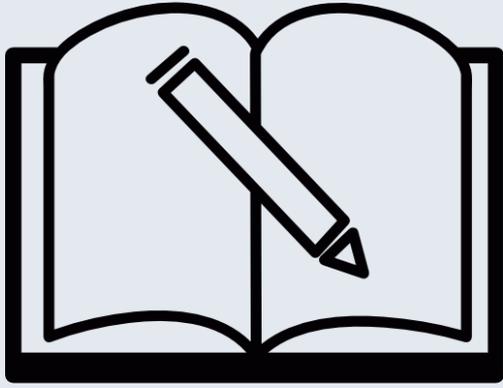


CENTER FOR
RESEARCH
INFORMATICS

Presenter: Julissa Acevedo
REDCap Administrator / System Analyst

SEMINAR FLOW





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

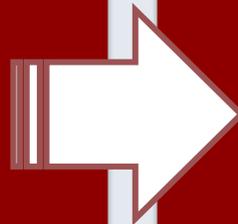
616,000 projects

835,000 users

UChicago:

4,100 projects

4,500 users



┆ CRI – WHAT WE DO



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

WEBSITE:
cri.uchicago.edu

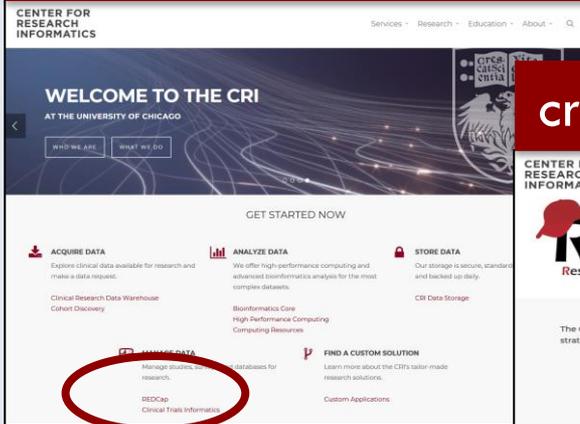
┆ WHAT IS REDCAP?

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.

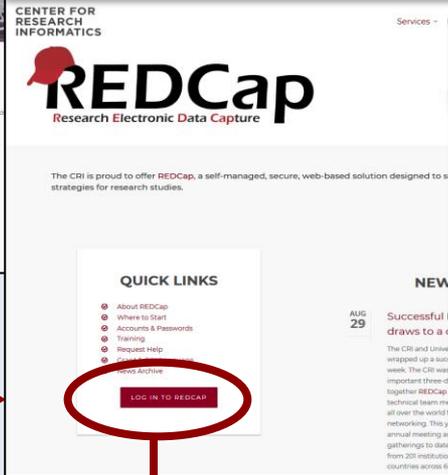
WHERE IS REDCAP?

cri.uchicago.edu



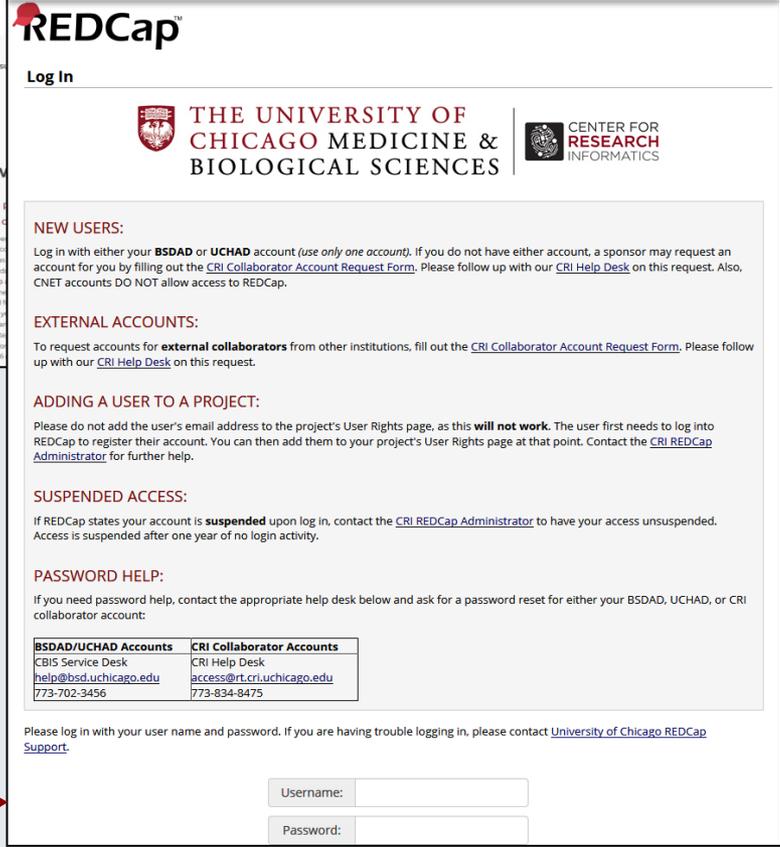
Center for Research Informatics homepage. The page features a navigation bar with 'Services', 'Research', 'Education', and 'About'. Below the header, there is a 'WELCOME TO THE CRI AT THE UNIVERSITY OF CHICAGO' section with 'WHO WE ARE' and 'WHAT WE DO' buttons. A 'GET STARTED NOW' section contains three columns: 'ACQUIRE DATA', 'ANALYZE DATA', and 'STORE DATA'. A 'UNIVERSITY DATA' section is also visible, with 'REDCap Clinical Trials Informatics' circled in red. A red arrow points from this circle to the next screenshot.

cri.uchicago.edu/redcap



REDCap Research Electronic Data Capture landing page. The page features the REDCap logo and a 'QUICK LINKS' section. The 'LOG IN TO REDCAP' button is circled in red. A red arrow points from this circle to the final screenshot.

redcap.uchicago.edu



REDCap login page for The University of Chicago Medicine & Biological Sciences. The page includes a 'Log In' header, university logos, and sections for 'NEW USERS:', 'EXTERNAL ACCOUNTS:', 'ADDING A USER TO A PROJECT:', and 'SUSPENDED ACCESS:'. A 'PASSWORD HELP:' section is also present. At the bottom, there is a table of contact information and a login form with 'Username:' and 'Password:' fields.

BSDAD/UCHAD Accounts	CRI Collaborator Accounts
CBIS Service Desk help@bsd.uchicago.edu 773-702-3456	CRI Help Desk access@rt.cri.uchicago.edu 773-834-8475

Please log in with your user name and password. If you are having trouble logging in, please contact [University of Chicago REDCap Support](#).

Username:

Password:

▶ 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

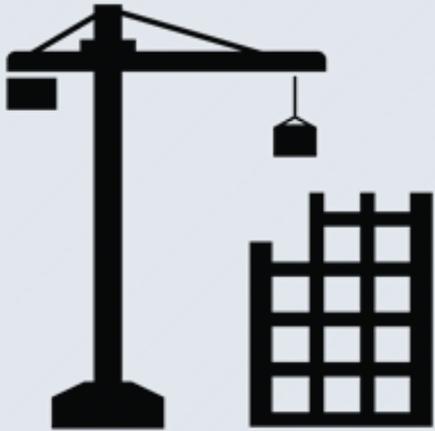
- Creating a project
- Adding and editing fields
- Optional modules and customizations
- Testing your project
- Moving to production

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

helpful
information!

BSDAD or UCHAD

The screenshot shows the REDCap login interface. At the top left is the REDCap logo. Below it is a 'Log In' section. The header includes the logos for 'THE UNIVERSITY OF CHICAGO MEDICINE & BIOLOGICAL SCIENCES' and the 'CENTER FOR RESEARCH INFORMATICS'. The main content area contains several sections: 'NEW USERS:', 'EXTERNAL ACCOUNTS:', 'ADDING A USER TO A PROJECT:', 'SUSPENDED ACCESS:', and 'PASSWORD HELP:'. At the bottom, there is a table with contact information for BSDAD/UCHAD and CRI Collaborator accounts, and a login form with 'Username:' and 'Password:' fields. A red arrow points from the 'BSDAD or UCHAD' text to the 'Username:' field. A large red bracket on the left side of the page groups the 'NEW USERS:', 'EXTERNAL ACCOUNTS:', and 'ADDING A USER TO A PROJECT:' sections under the 'helpful information!' label.

REDCap™

Log In

 THE UNIVERSITY OF CHICAGO MEDICINE & BIOLOGICAL SCIENCES |  CENTER FOR RESEARCH INFORMATICS

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 your 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 log in, 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:

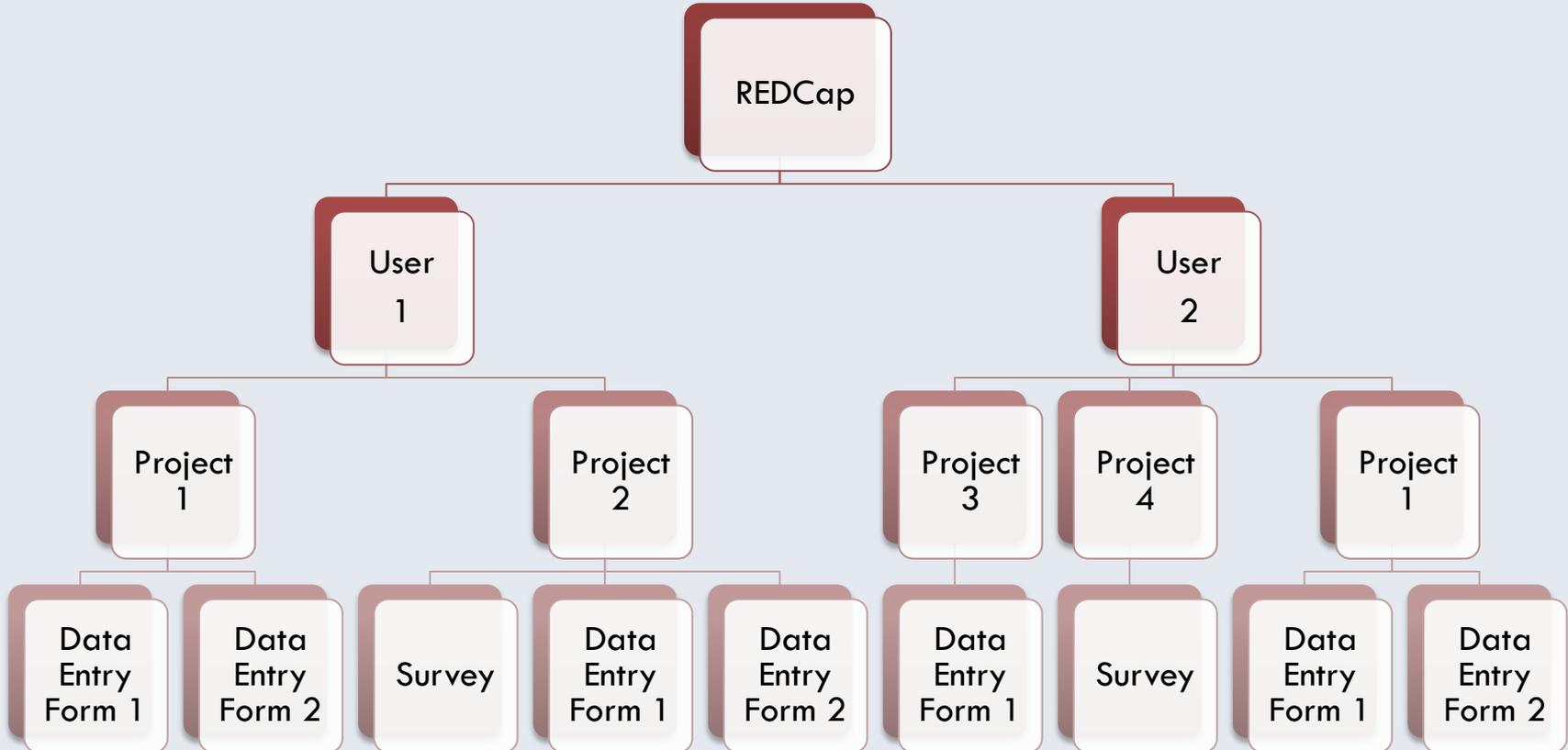
BSDAD/UCHAD Accounts	CRI Collaborator Accounts
CBIS Service Desk help@bsd.uchicago.edu 773-702-3456	CRI Help Desk access@rt.cri.uchicago.edu 773-834-8475

Please log in with your user name and password. If you are having trouble logging in, please contact [University of Chicago REDCap Support](#).

Username:

Password:

ACCESS EXPLAINED



HOME PAGE



Home

My Projects

+ New Project

Help & FAQ

Training Videos

Send-It

Messenger

Logged in as
t.cri.redcap1

My Profile

Log out

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 [University of Chicago REDCap Support](#).

REDCap Features

Build online surveys and databases quickly and securely - Create and design your project rapidly using secure web authentication from your browser. No extra software is required.

Fast and flexible - Conception to production-level survey/database in less than one day.

Export data to common data analysis packages - Export your data to Microsoft Excel, PDF, SAS, Stata, R, or SPSS for analysis.

Ad Hoc Reporting - Create custom queries for generating reports to view or download.

Scheduling - Utilize a built-in project calendar and scheduling module for organizing your events and appointments.

Easily manage a contact list of survey respondents or create a simple survey link - Build a list of email contacts, create custom email invitations, and track who responds, or you may also create a single survey link to email out or post on a website.

CREATE A PROJECT

- Home
- My Projects
- Create New Project**
- Training Resources
- Help & FAQ
- Send-It
- Control Center

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?

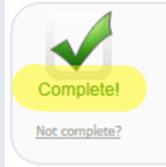
- Create an empty project (blank slate)
- Upload a REDCap project XML file (CDISC ODM format)
- Use a template (choose one below)

★ 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 (Druq A and Druq B) with each arm containing eight different events.

PROJECT SETUP STEPS



Project Home | Project Setup | Other Functionality | Project Revision History

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](#)

Design your data collection instruments

In progress

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 or

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

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

Set up project bookmarks (optional)

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

User Rights and Permissions

Optional

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 or

Test your project thoroughly

Not started

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.

Move your project to production status

Not started

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

STEP 1: PROJECT SETUP

Project Home **Project Setup** Other Functionality Project Revision History

Project status: Development Completed steps **0** of **7**



Not started

Main project settings

Use longitudinal data collection with repeating forms?

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

STEP 2: DATA COLLECTION INSTRUMENTS

Project Home Project Setup Other Functionality Project Revision History

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](#)

Design your data collection instruments
Not started

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 or
You may also browse for pre-built data collection instruments in the
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
<input type="text" value="Demographics"/> <input type="button" value="Save"/>	1		<input type="button" value="Choose action"/>

Instrument name	Fields	View PDF	Instrument actions
Demographics	1		<input type="button" value="Choose action"/>

 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 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:

- 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: Text Box (Short Text, Number, Date/Time, ...) ▼

Field Label [How to use Piping](#)

Field Annotation (optional) [Learn about Action Tags](#)

Explanatory notes - not displayed on any page ?

Variable Name (utilized during data export)

Enable auto naming of variable based upon its Field Label?

ONLY letters, numbers, and underscores

Validation? (optional) ---- None ---- ▼

— 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 Right / Vertical (RV) ▼
Align the position of the field on the page

Field Note (optional)
Small reminder text displayed underneath field

Save **Cancel**

▶ MATRIX OF FIELDS

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

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

 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.

Enable auto naming of variable based upon its Field Label?

Field Label	Variable Name <small>ONLY letters, numbers, and underscores</small>	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"/> ✖

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:

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

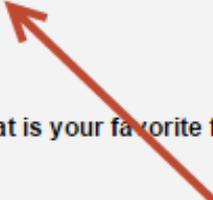
EDIT/COPY/MOVE/DELETE FIELDS

     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)

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?	<input type="radio"/> Chocolate <input type="radio"/> Strawberry <input type="radio"/> Vanilla	reset
How often do you eat _____ ice cream?	<input type="radio"/> Once a week <input type="radio"/> Twice a week <input type="radio"/> Three times a week	reset

With Piping:

What kind of ice cream do you like?	<input checked="" type="radio"/> Chocolate <input type="radio"/> Strawberry <input type="radio"/> Vanilla	reset
How often do you eat Chocolate ice cream?	<input type="radio"/> Once a week <input type="radio"/> Twice a week <input type="radio"/> Three times a week	reset

PIPING LOGIC

The screenshot shows a survey editor interface with a list of questions on the left and an 'Edit Field' dialog box on the right. A red arrow points from the 'ice_cream' variable in the first question to the 'ice_cream' variable in the 'Field Label' of the 'Edit Field' dialog.

Questions in the list:

- Variable: ice_cream
What kind of ice cream do you like?
Chocolate
Strawberry
Vanilla
- Variable: icecream_often
How often do you eat [ice_cream] ice cream?
Once a week
Twice a week
Three times a week

Edit Field Dialog:

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?
[How to use Piping](#)

Choices (one choice per line):

- Once a week
- Twice a week
- Three times a week

[How do I manually code the choices?](#)

Variable Name (utilized during data export): icecream_often
 Enable auto naming of variable based upon its Field Label?
ONLY letters, numbers, and underscores

Required?* No Yes
* Prompt if field is blank

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

Custom Alignment: Right / Vertical (RV)

Field Note (optional): []
Small reminder text displayed underneath field

Looking for Branching Logic? Try clicking the icon for this field after clicking the Save or Cancel button below.

Buttons: Save, Cancel

STEP 3: OPTIONAL MODULES & CUSTOMIZATIONS



Optional

I'm done!

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 

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
<input type="button" value="Add"/>	<input type="text" value="Asthma Center"/> <small>Enter the label for the link as it is seen on the left-hand menu</small>	<input type="text" value="http://asthma.bsd.uchicago.edu"/> <small>Enter the web address (URL) for the link (e.g., http://www.mysite.com/mypage.html)</small>	<input type="text" value="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

- My Projects
- Project Home
- Project Setup
- Project status: **Development**
- Data Collection [Edit instruments](#)
- Manage Survey Participants
 - Get a public survey link or build a participant list for inviting respondents
- Record Status Dashboard
 - View data collection status of all records
- Add / Edit Records
 - Create new records or edit/view existing ones
- Applications
 - Calendar
 - Data Exports, Reports, and Stats
 - Data Import Tool
 - Data Comparison Tool
 - Logging
 - Field Comment Log
 - File Repository
 - User Rights** and DAGs
 - Record Locking Customization
 - E-signature and Locking Mgmt
 - Data Quality

General Testing I

Project Home

Project status: **Development**



Main

Disable

In progress

Project Setup

User Rights

Data Access Groups

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

Basic Rights

Expiration Date (M/D/Y)
(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.*

	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"/>

New User Notification

Notify user of their project access via email?

Add user

▶ 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



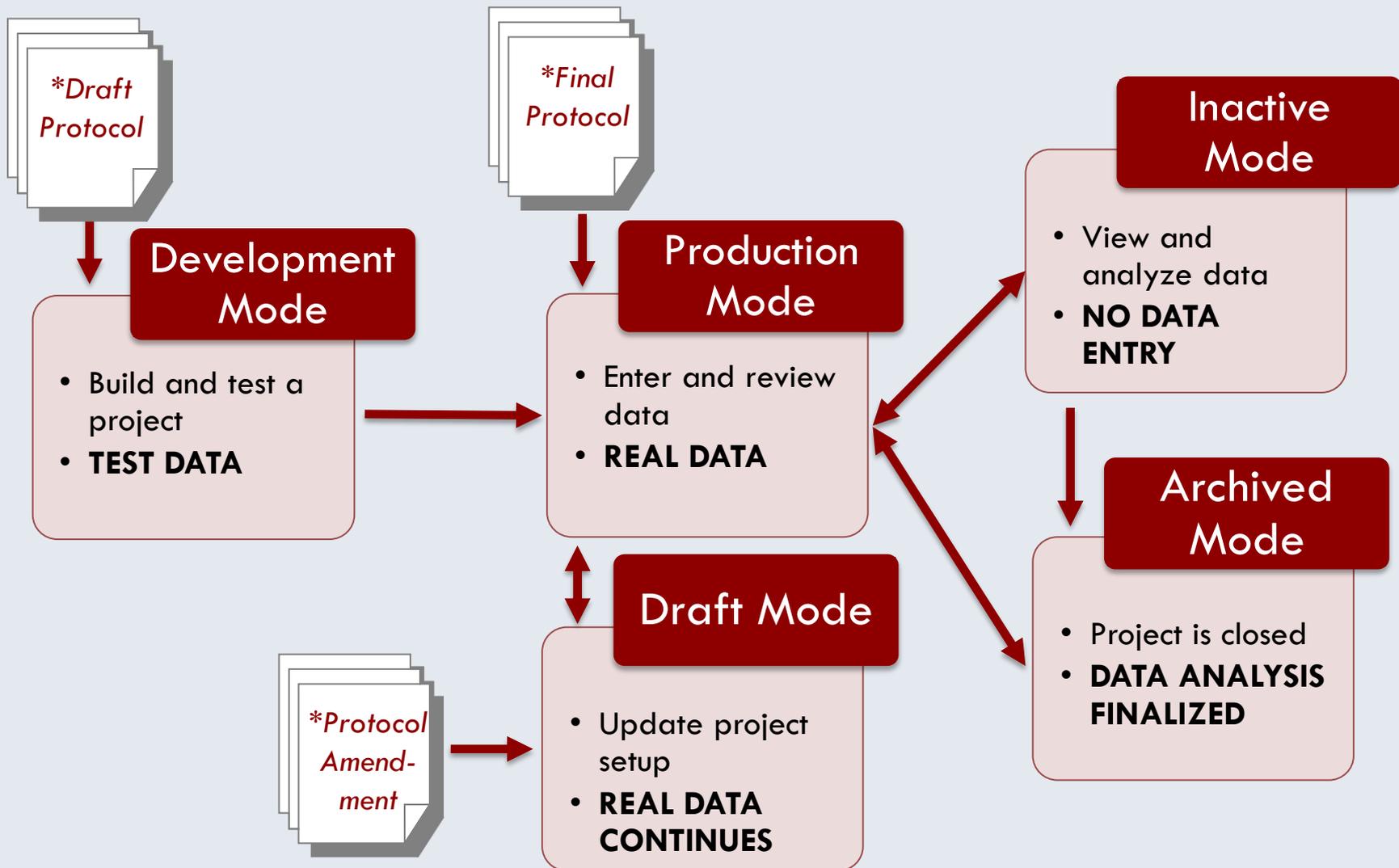
Not started

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](#)

PROJECT TIMELINE AND MODES



**if IRB approval required*



Live Demo



Using Surveys

ENABLING SURVEYS

Step 1:

Project Home | **Project Setup** | Other Functionality | Project Revision History

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



Complete!

[Not complete?](#)

Main project settings

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

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

Step 2:

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

Survey options:

Add new instrument:

a new instrument from scratch

a new instrument from the official [REDCap Shared Library](#) [?](#)

instrument ZIP file from another project/user or [external libraries](#) [?](#)

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Demographics	20		<input type="button" value="Enable"/>	<input type="button" value="Choose action"/>	

▶ SURVEY SETTINGS

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

Basic Survey Options:

 **Survey Title**
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!



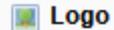
B *I* U ABC  ab         HTML

 [How to use Piping here](#)

▶ SURVEY DESIGN OPTIONS

Survey Design Options:



Logo

(Optional: display an image above the survey title)

Add new logo:

(Images wider than 600 pixels will be downsized to fit page.)

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

Survey design preview (sample survey):

[Expand](#)

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 to expect 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

Survey Customizations:

☰ Question Numbering

Auto numbered ▼

📄 Question Display Format (One page or multiple pages?)

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.

Disabled ▼

Additional settings:

10 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?](#))

🔊 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).

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.)



M/D/Y H:M

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.)

Allow respondents to return and modify completed responses?

▶ SURVEY TERMINATION OPTIONS

Survey Termination Options:

(Optional) Auto-continue to next survey: Automatically start the next survey instrument after finishing this survey 

— OTHERWISE —

Redirect to a URL
(Redirect to a webpage when survey is completed)

Provide a full URL, e.g. <http://www.example.com/mypage.html>

 [How to use Piping here](#)

— OR —

Survey Completion Text
(Displayed after survey is completed as 'thank you' text or as acknowledgement 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)

No

▶ PUBLIC SURVEY LINK

 Public Survey Link

 Participant List

 Survey Invitation Log

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](#) or [Get embed code to place link on a webpage](#).

Public Survey URL:

 Copy to clipboard

OR

Short Public Survey URL:

 Copy to clipboard

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 < >

 Copy to clipboard

 Open public survey

 Send me URL via email

PRIVATE SURVEY LINKS

Manage Survey Participants

Public Survey Link

Participant List

Survey Invitation Log

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" Remove all participants

Displaying 1 - 10 of 10 Add participants Compose Survey Invitations Export list

Email	Participant Identifier (optional) Disable	Link	Invitation Scheduled?	Invitation Sent?	Responded?	
arodrigu1@bsd.uchicago.edu	Alex Rodriguez		-			remove
braumann@bsd.uchicago.edu (ID 2)	Bonnie Trumann		-			remove
braumann@ci.uchicago.edu (ID 3)	Brenda Starr	-	-			remove
brigitte_raumann@yahoo.com	Brigitte Raumann		-			remove
dermoore82@gmail.com	Derrick Moore		-			remove
jimtaylor@yahoo.com	Jim Taylor		-			remove
john.williams@hotmail.com	John Williams		-			remove
kle@bsd.uchicago.edu	Kevin Le		-			remove
nbahroos@bsd.uchicago.edu	Neil Bahroos		-			remove
putnamtr@gmail.com	ID 4930-72		-			remove

┆ 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

Form Status

Complete?



Complete

Save Record

Save and Continue

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 on 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.

Legend for status icons:

- Incomplete
- Incomplete (no data saved)
- Unverified
- Partial Survey Response
- Complete
- Completed Survey Response

Displaying record "1" through "5" of 5 records

Displaying: [Instrument status only](#) | [Lock status only](#) | [All status types](#)

Study Id	Ice Cream Survey
1	
2	
3	
4	
5	

PROJECT CHANGE LOG

 **Logging**  [Download entire logging record to Microsoft Excel \(CSV\)](#)

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

Filter by event: ▼

Filter by user name: ▼

Filter by record: ▼

Displaying events (by most recent): ▼

Time / Date	Username	Action	List of Data Changes OR Fields Exported
04/26/2015 2:38pm	jahoitenga	Created Record 2	visit_date = '2015-04-27', daily_medication_list = 'Tylenol', email_address = 'wcteachout@cmh.edu', county(3) = checked, diabetes_indicator = '0', diabetes_tf = '0', participant_signature = '16975', signed_consent_form = '16976', demographics_complete = '2', record_id = '2'
04/26/2015 2:38pm	[survey respondent]	Created Response 1	visit_date = '2015-04-26', daily_medication_list = 'None', email_address = 'jahoitenga@cmh.edu', county(1) = checked, diabetes_indicator = '0', diabetes_tf = '0', participant_signature = '16973', signed_consent_form = '16974', record_id = '1', demographics_complete = '2'
04/26/2015 2:37pm	jahoitenga	Manage/Design	Set up survey
04/26/2015 2:36pm	jahoitenga	Manage/Design	Modify project settings
04/26/2015 2:29pm	jahoitenga	Manage/Design	Modify project settings
04/26/2015 1:26pm	jahoitenga	Manage/Design	Modify project settings
04/25/2015 1:47pm	jahoitenga	Manage/Design	Create project field
04/25/2015 1:45pm	jahoitenga	Manage/Design	Reorder project fields
04/25/2015 1:45pm	jahoitenga	Manage/Design	Create project field
04/25/2015 1:23pm	jahoitenga	Manage/Design	Create project field
04/25/2015 1:21pm	jahoitenga	Manage/Design	Create project field
04/25/2015 1:12pm	jahoitenga	Manage/Design	Edit project field

FIELD DATA HISTORY

Ice Cream Survey

Invitation status: Survey options

Editing existing Record ID 1

Record ID 1
(To rename this record, modify the value immediately below.)

Record ID

First Name

Last Name

Data History for variable "first_name" for record "1" ✕

Listed below is the history of all data entered for the variable "first_name" for Record ID "1". The data history results are sorted from earliest to most recent.

Date/Time of Change	User	Data Changes Made
08/11/2016 1:36pm	jacevedo	Jane
08/11/2016 1:38pm	jacevedo	Susan

Close

DATA EXPORTS, REPORTS, AND STATS

Data Exports, Reports, and Stats

 [VIDEO: How to use 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

	Report name	View/Export Options	Management Options	Report ID  (auto-generated)
A	All data (all records and fields)	View Report Export Data Stats & Charts		
B	Selected instruments (all records)	Make custom selections		
	+ Create New Report			

DATA EXPORTS, REPORTS, AND STATS

Exporting "All data (all records and fields)"

Select your export settings, which includes the export format (Excel/CSV, SAS, SPSS, R, Stata) and whether or not to perform de-identification on the data set.

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 date and datetime fields
- OR —
- Shift all dates by value between 0 and 364 days (shifted amount determined by algorithm for each record) [What is date shifting?](#)

[Deselect all options](#)

Export Data **Cancel**

DATA EXPORTS, REPORTS, AND STATS

Name of Report: List of Participants Who Like Chocolate Ice Cream

STEP 1

User Access: Choose who can view this report

All users - OR - Custom user access (Choose specific users, roles, or data access groups who will have access)

STEP 2

Fields to include in report Add all fields from selected instrument: -- choose instrument --

Field	Field Name	Instrument
Field 1	record_id "Study Id"	Instrument: Form 1 Set Up As A Survey
Field 2	mc_dropdown "Multiple Choice (Drop Dow	Instrument: Form 1 Set Up As A Survey
Field 3	-- select a field --	Instrument:

Additional fields to include in report (optional)

Include the survey identifier field and survey timestamp field(s)?

STEP 3

Filters (optional) [How to use filters and AND/OR logic](#)

Operator / Value

Filter	Field	Operator	Value
Filter 1	mc_dropdown "Multiple Choice (Drop Dow	=	Chocolate
AND			
Filter 2	-- select a field --	=	

Switch format: [Use advanced logic](#)

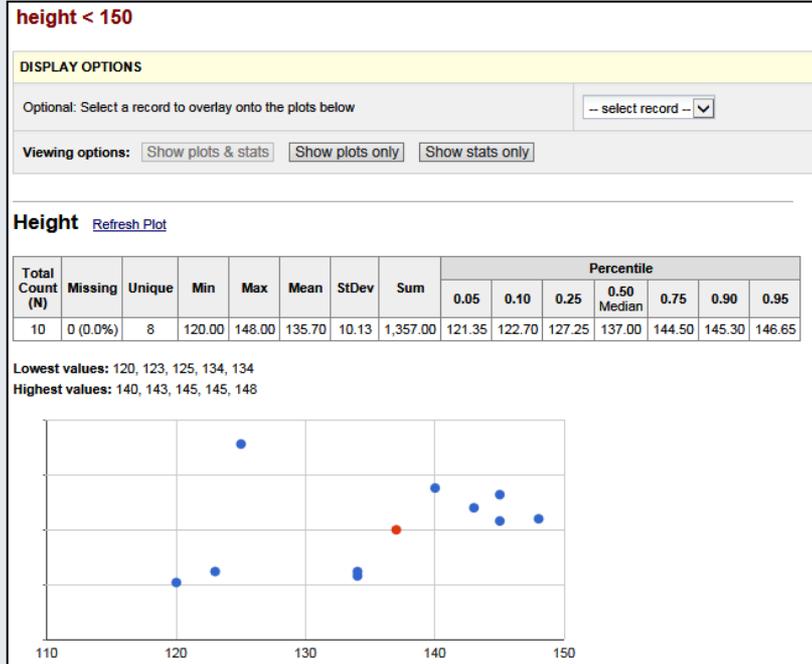
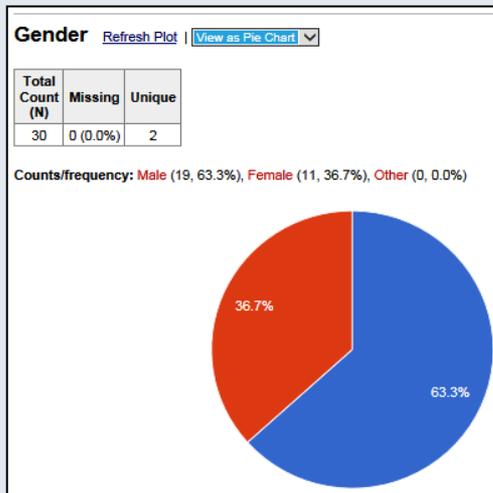
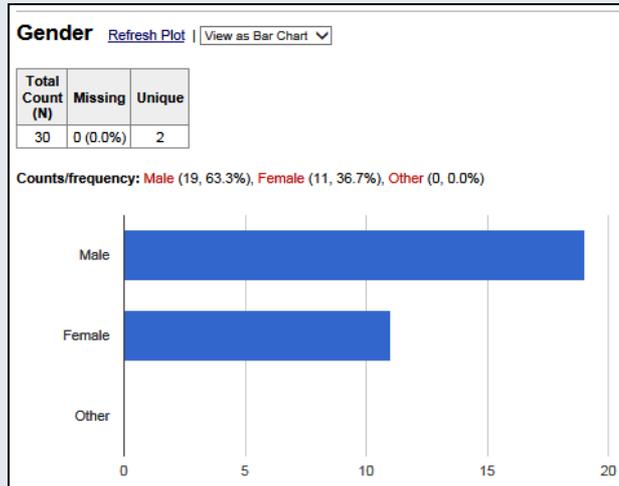
STEP 4

Order the Results (optional)

First by	record_id "Study Id"	Ascending order
Then by	Type variable name or field label	Ascending order
Then by	Type variable name or field label	Ascending order

Save Report [Cancel](#)

STATS AND CHARTS



DATA DICTIONARY CODEBOOK

Print page

Data Dictionary Codebook

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

FILE REPOSITORY

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.

 User Files

 Data Export Files

 Upload New File

Filter by file type: ALL 		Action
 IRB Protocol current File name: IRB49857479_Protocol.docx Date uploaded: 07/27/2010 File size: 9.7 KB	  	
 Consent Form File name: Consent_Form_IRB49857479.docx Date uploaded: 07/27/2010 File size: 9.7 KB	  	

REDCap Messenger – Home Page

REDCap™ Home My Projects + New Project Help & FAQ Training Videos Send-It Messenger

Messenger (Close)

Notifications (Checkmark)

Conversations (Calendar, Search, Info)

User Access?

Create new conversation

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



Contact REDCap administrator

Help Tab



Home My Projects Create New Project Training Resources **Help & FAQ** Send-It

Email

- redcap@rt.cri.uchicago.edu

Website

- <https://cri.uchicago.edu/redcap>

▶ Additional Help

CENTER FOR
RESEARCH
INFORMATICS

Services ▾ Research ▾ Education ▾ About ▾ | Q

REDCAP TRAINING with the CRI

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

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

WEBSITE:
[cri.uchicago.edu/
redcap-training/](http://cri.uchicago.edu/redcap-training/)

▶ 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!