

# Making the Most of



# Beyond the Basics



THE UNIVERSITY OF  
CHICAGO MEDICINE &  
BIOLOGICAL SCIENCES



CENTER FOR  
**RESEARCH**  
INFORMATICS

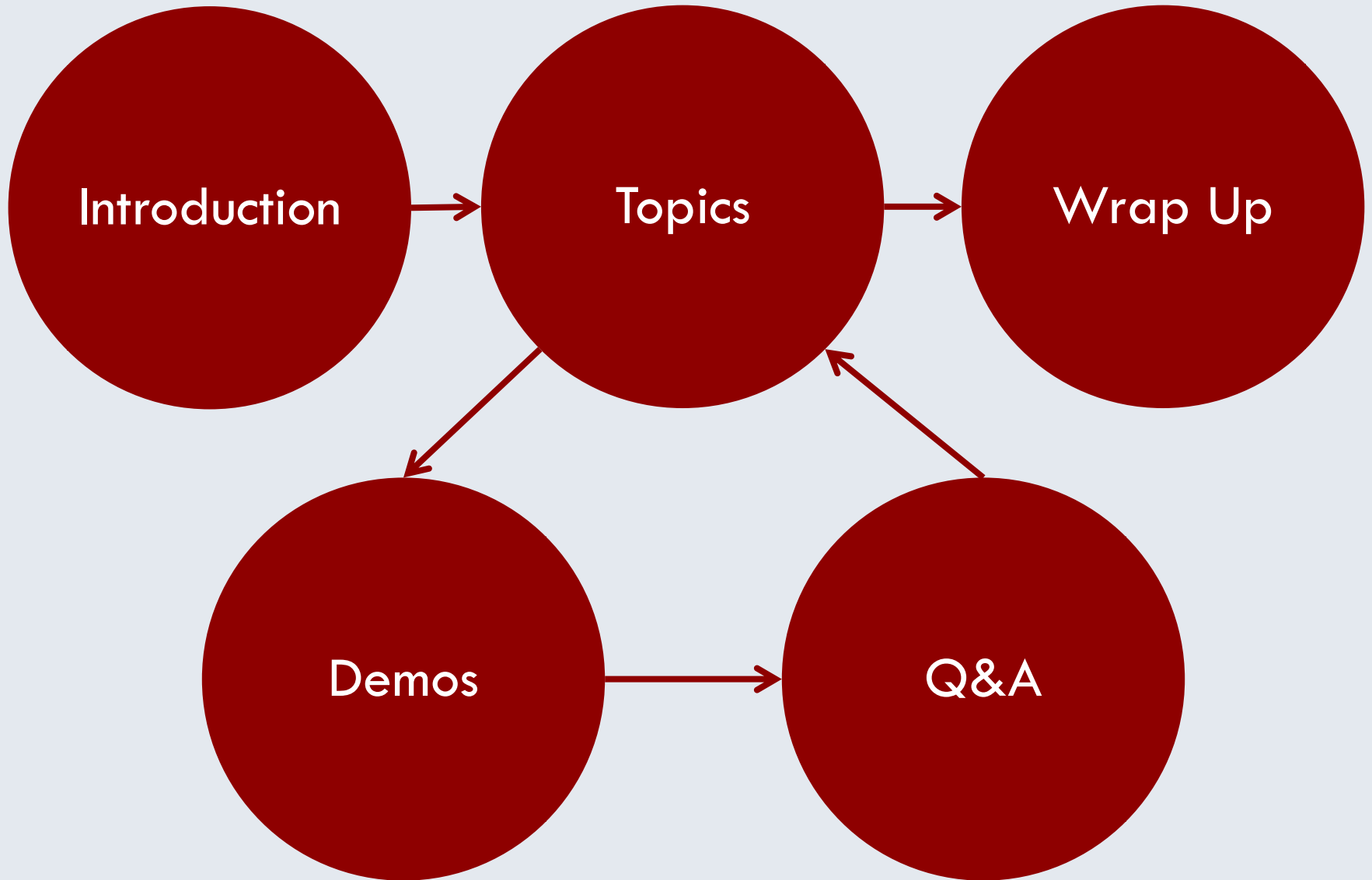
**Presenter: Julissa Acevedo**  
**REDCap Administrator / Systems Analyst**

# SEMINAR SERIES

- Introduction to REDCap (January)
- **Beyond the REDCap Basics (April)**
- All About REDCap Surveys (July)

<http://cri.uchicago.edu/seminar-series/>

# SEMILNAR FLOW





# Introduction

# ▶ CENTER FOR RESEARCH INFORMATICS



## 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](http://cri.uchicago.edu)

# 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:

3354 institutions

130 countries

659,000 projects

906,000 users

UChicago:

4480 projects

4799 users



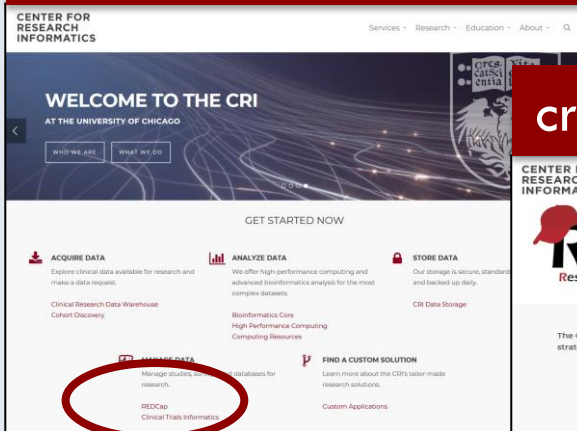
# ▸ REDCAP DEFINED

*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.

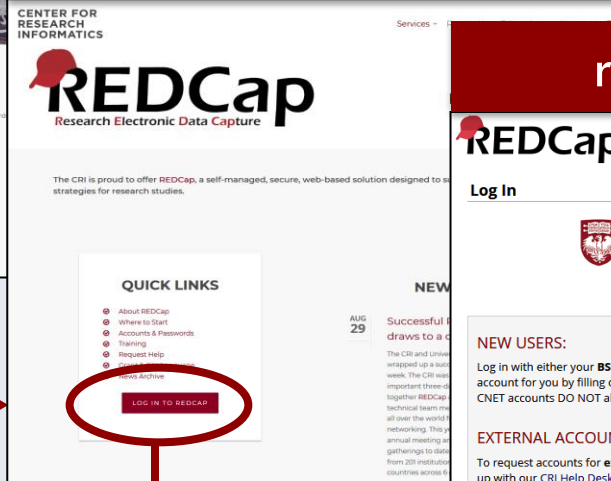
# REDCAP LOCATION

cri.uchicago.edu



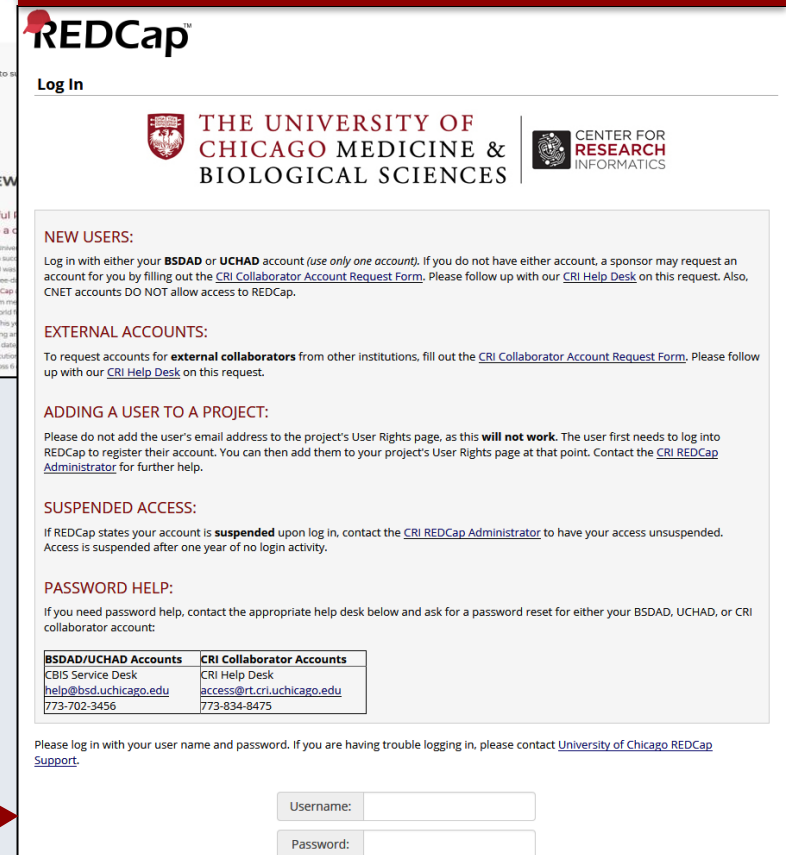
Center for Research Informatics homepage. The page features a navigation bar with 'Services', 'Research', 'Education', and 'About'. Below the header, there is a 'WELCOME TO THE CRI AT THE UNIVERSITY OF CHICAGO' section with 'WHO WE ARE' and 'WHAT WE DO' buttons. A 'GET STARTED NOW' section follows, containing three columns: 'ACQUIRE DATA', 'ANALYZE DATA', and 'STORE DATA'. A red circle highlights the 'UNIVERSITY DATA' link under 'ACQUIRE DATA', which includes 'REDCap Clinical Trials Informatics'. 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. A red circle highlights the 'LOG IN TO REDCAP' button. 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 the university logo and the Center for Research Informatics logo. It features a 'Log In' section with instructions for new users, external accounts, adding users to a project, and suspended access. A 'PASSWORD HELP:' section provides contact information for account issues. At the bottom, there are input fields for 'Username:' and 'Password:'. A red arrow points from the 'LOG IN TO REDCAP' button in the previous screenshot to the 'Log In' section.

**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 <a href="mailto:help@bsd.uchicago.edu">help@bsd.uchicago.edu</a> 773-702-3456	CRI Help Desk <a href="mailto:access@rt.cri.uchicago.edu">access@rt.cri.uchicago.edu</a> 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:

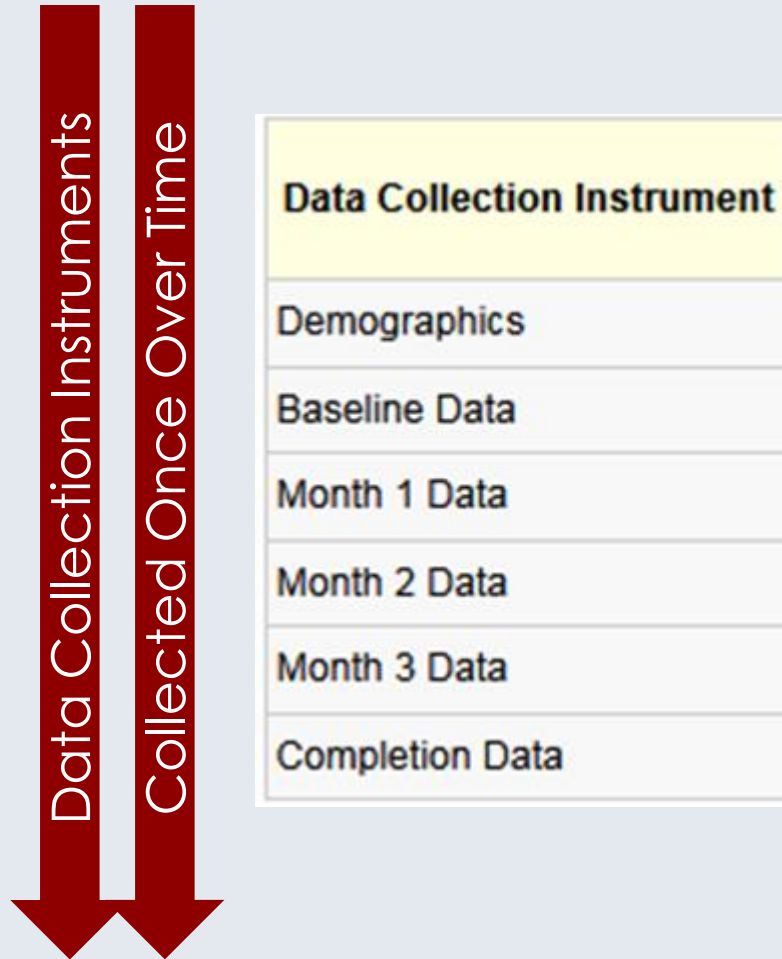
# SEMINAR TOPICS

- Longitudinal Data Collection
- Edit Data Dictionary via Excel
- Data Import Tool
- Data Exports, Reports, and Stats  
including Report Folders
- User Rights, Roles, Data Access Groups
- Advanced Features
- Data Capture on Smart Devices

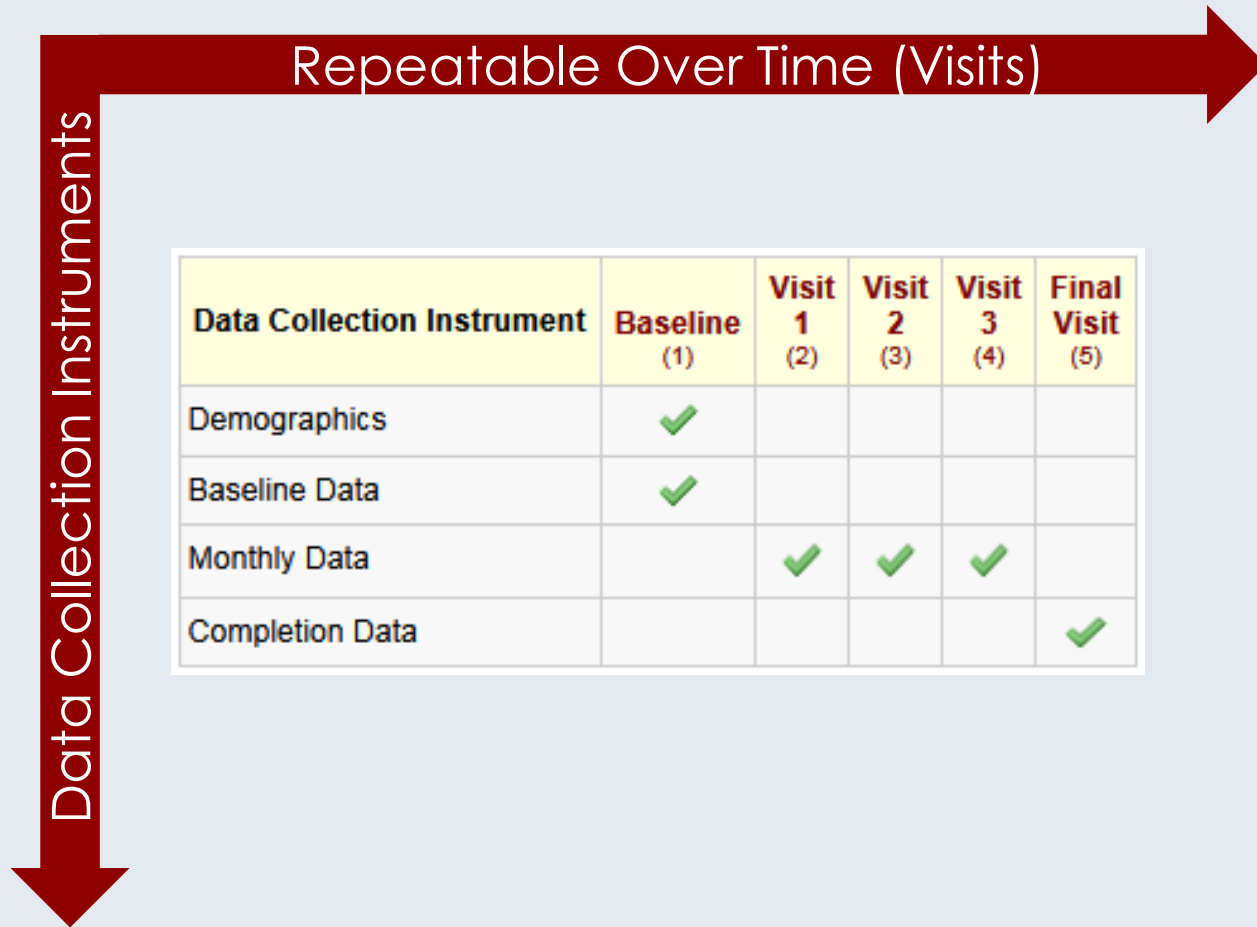


# Longitudinal Data Collection

# ▶ What is classic data collection?



# What is longitudinal data collection?



# Classic vs longitudinal data collection

## CLASSIC

- Only uses instruments.
- Doesn't use events.
- Create an instrument for each time point.

Data Collection Instrument
Demographics
Baseline Data
Month 1 Data
Month 2 Data
Month 3 Data
Completion Data

## LONGITUDINAL

- Uses instruments.
- Uses events.
- Repeat instruments using events.

Data Collection Instrument	Baseline (1)	Visit 1 (2)	Visit 2 (3)	Visit 3 (4)	Final Visit (5)
Demographics	✓				
Baseline Data	✓				
Monthly Data		✓	✓	✓	
Completion Data					✓

# How to enable longitudinal data collection?

Project Home | Project Setup | Other Functionality | Project Revision History | Edit project settings

Project status: Development Completed steps 7 of 8

**Complete!**  
Not complete?

### Main project settings

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

Disable  Use longitudinal data collection with defined events? ← **1 enable setting**

Modify project title, purpose, etc.

**Complete!**  
Not complete?

### Design your data collection instruments

Add or edit fields on your data collection instruments. This may be done by either using the Online Design method (online method) or by using the Offline Design method (offline method). Quick links: [Design your instruments](#), [View the current Data Dictionary](#)

Go to [Design your instruments](#) or [View the current Data Dictionary](#)

You may use pre-built data collection instruments in the [REDCap Shared Library](#)

Have you checked for identifiers? [Check For Identifiers](#) (Are all identifier fields have been tagged?)

**2 define events**      **3 assign forms**

**Complete!**  
Not complete?

### Define your events and designate instruments for them

Create events using data collection instruments and/or set up scheduling.

Go to [Define My Events](#) or [Designate Instruments for My Events](#)

# Display and Reporting Differences

## *Classic Project*

One row per record:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	study_id	(screening form fields)----->			(month1 form fields)----->			(month2 form fields)----->			(month3 form fields)----->			(study completion form fields)----->			
2	100	data	data	data	data	data	data	data	data	data	data	data	data	data	data	data	data
3	200	data	data	data	data	data	data	data	data	data	data	data	data	data	data	data	data
4	300	data	data	data	data	data	data	data	data	data	data	data	data	data	data	data	data

## *Longitudinal Project*

Multiple rows per record:

	A	B	C	D	E	F	G	H	I	J	K	L
1	study_id	redcap_event_name	(screening form fields)----->			(monthly form fields)----->			(study completion form fields)----->			
2	100	screening	data	data	data							
3	100	month1				data	data	data				
4	100	month2				data	data	data				
5	100	month3				data	data	data				
6	100	completion							data	data	data	data
7	200	screening	data	data	data							
8	200	month1				data	data	data				
9	200	month2				data	data	data				
10	300	screening	data	data	data							
11	300	month1				data	data	data				

# Repeating Forms and Events

**Enable optional modules and customizations**

Complete!   
 Not complete?

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

Additional customizations

**Repeatable instruments**

Complete!   
 Not complete?

Modify  Repeatable instruments ?

[Watch in-depth video \(33 minutes\)](#) [View text on separate page](#)

REDCap has the ability to repeat a data collection instrument or an entire event of instruments an unlimited number of times without having to specify the amount needed. This is sometimes called one-to-many data collection, in which a project can have one or more repeating parts. For example, if each record in a hypothetical project represents a person,

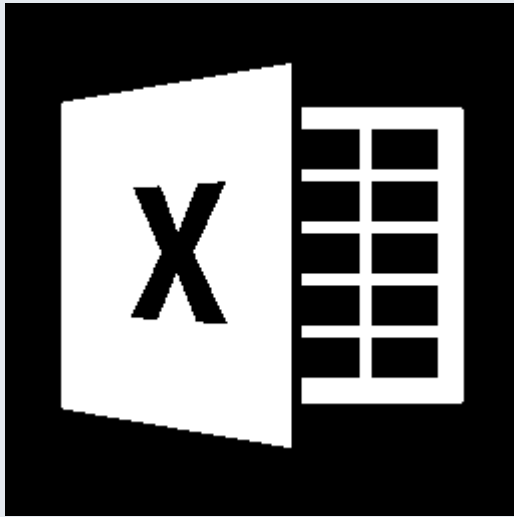
# ▸ Repeating Forms and Events

This feature can be used for:

- Classic projects – to repeat forms
- Longitudinal projects – to repeat forms and events
- Survey projects – to allow participants to repeat surveys




Live Demo



# Edit Data Dictionary via Excel

# Editing your Instruments: Two Methods





**Complete!**

[Not complete?](#)

### 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). Quick links: [Download PDF of all 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?

online  
REDCap

REDCap  
& Excel

# Editing your Instruments: Data Dictionary

[Project Home](#) [Project Setup](#) [Online Designer](#) [Data Dictionary](#)

 [VIDEO: How to use this page](#)


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 module may be used for making changes to the project, such as adding new fields or modifying existing fields, by using an offline method called the Data Dictionary. The Data Dictionary is a specifically formatted CSV (comma delimited) file within which you may construct your project fields and afterward upload the file here to commit the changes to your project.


Click the 'Browse' or 'Choose File' button below to select the file on your computer, and upload it by clicking the 'Upload File' button. Once your file has been uploaded, changes will NOT immediately be made but will be displayed and checked for errors to ensure that all the formatting in your Data Dictionary is correct before official changes are made to the project. **Snapshot note:** A snapshot of your project's current Data Dictionary will be created automatically during the Data Dictionary upload process before committing the new Data Dictionary. The snapshot can later be accessed and downloaded from the Project Revision History page.

**Need some help?**  
If you wish to view an example of how your Data Dictionary may be formatted, you may download the [Data Dictionary demonstration file](#), or you may view the [Data Dictionary Tutorial Video \(10 min\)](#). For help setting up your Data Dictionary, you may also see the instructions listed on the [Help & FAQ](#).

**Steps for making project changes:**

- 1.) [Download the current Data Dictionary](#) 
- 2.) Edit the Data Dictionary (see the [Help & FAQ](#) for help)
- 3.) Upload the Data Dictionary using the form below
- 4.) The changes will be made to the project after the Data Dictionary has been checked for errors

**Upload your Data Dictionary file** (CSV file format only)

Format for min/max validation values for date and datetime fields:  

how-to  
video

# ▸ Steps for Data Import Tool



## ‡ Caution!

- 1** Uploading a new data dictionary **replaces** the old one. It does not append to the current one. Always upload the old dictionary **with** your changes – *not just your changes!*
- 2** Data dictionary version history is automatic for projects in *Production Mode*, but it is **not** automatic for projects in *Development Mode*. Take “snapshots” often in *Development Mode!*
- 3** If your project has special characters, use **Google Sheets** to preserve the characters. *Excel will jumble them!*



# ‡ Good Uses for Updating via Data Dictionary

- 1 Make several copies of instruments or fields in batch.
- 2 Turn radio buttons into a matrix field by adding a Matrix Group Name.
- 3 Make batch changes to all fields for:
  - \* Branching Logic
  - \* Text Validation
  - \* Identifiers
  - \* Required Fields
  - \* Custom Alignment
  - \* Field Notes



# ▶ Editing your Instruments: Online Designer

Project Home | Project Setup | **Online Designer** | Data Dictionary

Create snapshot of instruments | VIDEO: How to use this page  
Last snapshot: never ?

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.

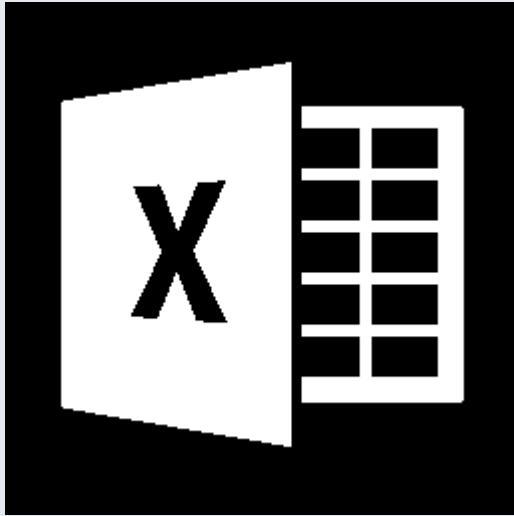
**Data Collection Instruments**

**Add new instrument:**

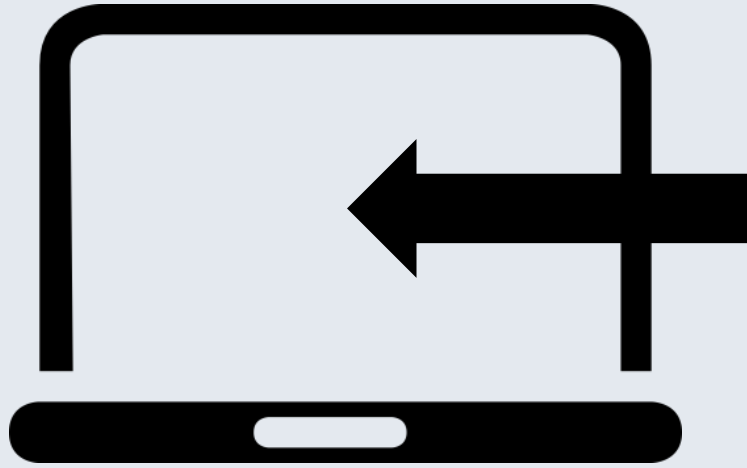
- Create a new instrument from scratch
- Import a new instrument from the official [REDCap Shared Library](#)
- Upload instrument ZIP file from another project/user or [external libraries](#)

Instrument name	Fields	View PDF	Instrument actions
Screening	19		Choose action ▾
Lab Values	18		Choose action ▾
Study Completion	5		<ul style="list-style-type: none"><li>Rename</li><li><b>Copy</b></li><li>Delete</li><li>Download instrument ZIP</li></ul>

copy instrument →



Live Demo



# Data Import Tool

# ▶ Data Collection Types

The screenshot displays the 'Data Collection' section of a software interface. It features a header with 'Data Collection' and an 'Edit instruments' link. Below this, there are two main sections: 'Record Status Dashboard' and 'Applications'. The 'Record Status Dashboard' includes 'Add / Edit Records' and 'Show data collection instruments'. The 'Applications' section lists various tools such as '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', 'API and API Playground', 'REDCap Mobile App', 'UChicago Advanced Features', and 'UChicago Support Website'.

online  
data  
entry

Excel  
data  
import

# ▶ Data Import Tool


## Data Import Tool

This module may be used for importing data into this project from a CSV (comma delimited) file or alternatively from an XML file in CDISC ODM format. Below are the steps you will need to follow in order to import your data successfully into this project.

### NOTICE:

This project is currently in Development status. **Real data should NOT be entered** until the project has been moved to Production status.

 CSV import

 CDISC ODM (XML) import

### Instructions:

1.) Click the link below to download your data import template as a CSV (comma delimited) file. Save it locally to your computer and then open it to begin filling it with the data you wish to import.

 [Download your Data Import Template](#) (with records in rows)

OR


 [Download your Data Import Template](#) (with records in columns)

2.) In each column of the Data Import Template file that you downloaded, place the data for each record that you wish to import. Once all your data has been added, save the file.

- Be sure not to change the Variables/Field Names in the file or an error may occur.
- Also, for all of the 'dropdown' or 'radio' fields in the project, you must make sure that the numerical value (rather than the text value) is entered in those cells, or else it cannot be processed.
- Any empty rows or columns in the file can be safely deleted before importing the file. Doing this reduces the upload processing time, especially for large projects.


3.) Click the 'Browse' or 'Choose File' button below to select the file on your computer, and upload it by clicking the 'Upload File' button.

4.) Once your file has been uploaded, the data will NOT be immediately imported but will be displayed and checked for errors to ensure that all the data is in correct format before it is finally imported into the project.

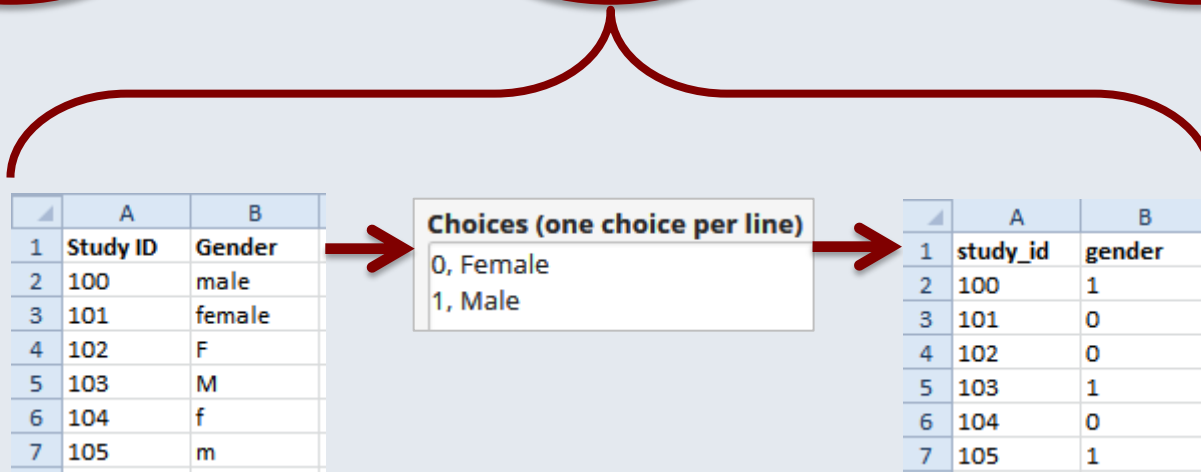
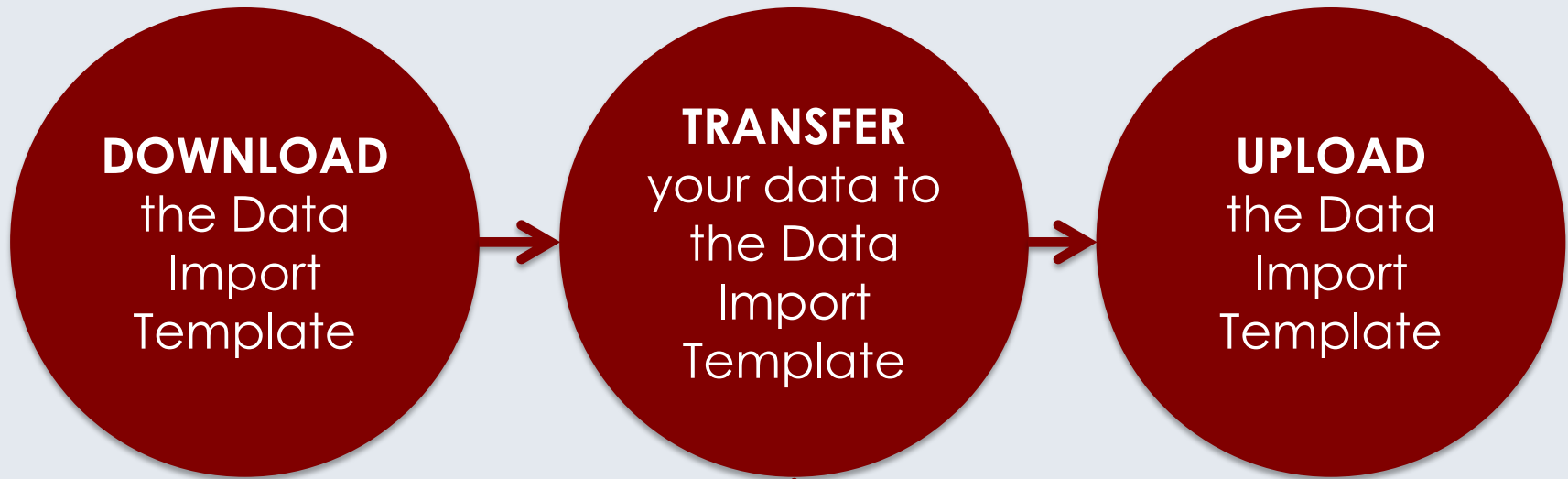
**Record format:** The file to be uploaded has its records stored as separate  

**Format for date and datetime values:**  

**Allow blank values to overwrite existing saved values?**  

 Upload your CSV file:

# Steps for Data Import Tool



## ⌋ Caution!

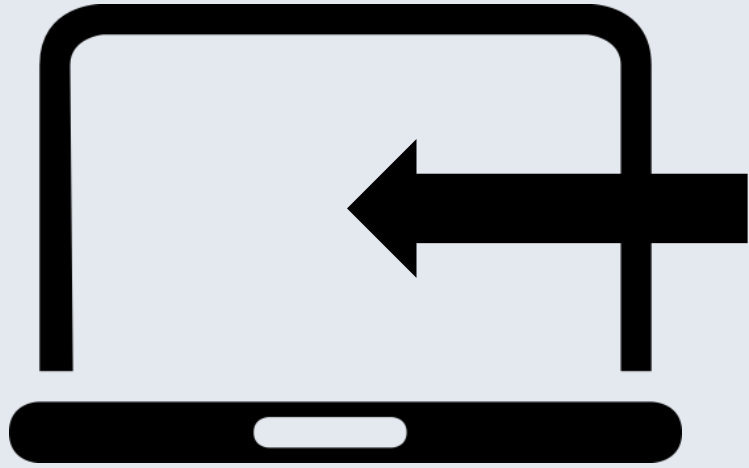


**1** Don't change the variable names on the template. They must match the project's variable names.

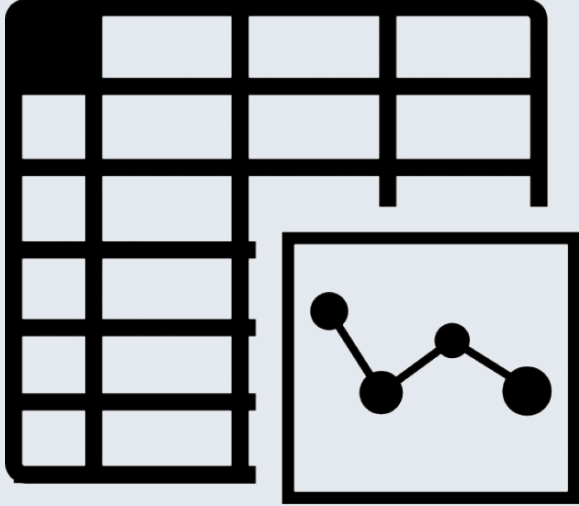
**2** For all dropdown, radio button, checkbox, or matrix fields, upload the numerical value (rather than the text value).

**3** Empty rows or columns can be deleted before importing the file to reduce the upload processing time.

**4** It's recommended you import a few variables at a time. The entire template doesn't need to be imported all at once.



Live Demo



# Data Exports, Reports, and Stats


# ▶ Data Exports, Reports, and Stats Page

## Data Exports, Reports, and Stats

 [VIDEO: How to use Data Exports, Reports, and Stats](#)

 Create New Report







 My Reports & Exports

 Other Export Options

how-to  
video

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)
<b>A</b>	<b>All data</b> (all records and fields)	 View Report  Export Data  Stats & Charts		
<b>B</b>	<b>Selected instruments</b> (all records)	 Make custom selections		
<b>C</b>	 Create New Report			

# Report Folders

## Report Folders



Report Folders are a way to organize your reports by putting them into groups. You may create new folders below and then assign reports to them on the right. A report can be assigned to multiple folders at the same time. To reorder your folders, you can drag and drop them in the left-hand table. Note: All users in this project will be able to see the folders so long as they have 'View Access' to at least one report in the folder.

### STEP 1: Create Folders

My Report Folders

My Reports



### STEP 2: Assign Your Reports To Folders

My Reports

 Hide reports already assigned

Select reports below to add to this folder

MedRec

Third breast cancer

Second breast cancer

PathList

Velos Report

MRN and Name

Age

Race

Time

DMHTN

Reports

Search

Organize

Edit



1) MedRec

2) Third breast cancer

3) Second breast cancer

4) PathList

5) Velos Report

6) MRN and Name

7) DMHTN

My Reports

1) Age

2) Race

3) Time

Report Search



# Report Search

**Reports** Search reports by title


- 1) Physician\_info
- 2) # of bronchs\_completed
- 3) # of bronchs\_refused
- 4) #Of bronchs\_ineligible
- 5) Abridge.weekly\_report
- 6) # of bronchs scheduled
- 7) Rebecca 5-13-11
- 8) # of screenings
- 9) All Local site ID's
- 10) Incomplete.tests.redraw




Report  
Search


# Report Access

**STEP 1**

 **User Access:** Choose who can edit and view this report

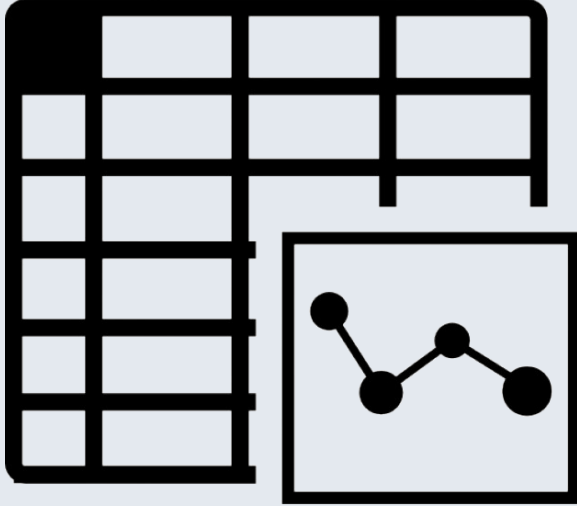
 **View Access:** Choose who sees this report on their left-hand project menu [?](#)

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

 **Edit Access:** Choose who can edit, copy, or delete this report (requires user to have 'Add/Edit/Organize Reports' privileges)

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





Live Demo



# User Rights

# ▶ User Rights

Project Home

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)

new  
users

Role name

(click role name to edit role)

Username or users assigned to a role  
(click username to edit or assign to role)

Expiration  
(click expiration to edit)

Data Access Group  
(click DAG to assign user)

Project Design and Setup

User Rights

Data Access Groups

Data

—

**jacevedo** (Julissa Acevedo)

current  
users



Ful

# ▶ User Roles

🏠 Project Home

☰ 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)

new  
roles

Role name (click role name to edit role)	Username or users assigned to a role (click username to edit or assign to role)	Expiration (click expiration to edit)	Data Access Group (click DAG to assign user)	Project Design and Setup	User Rights	Data Access Groups
<b>Project Manager</b>	<b>jacevedo</b> (Julissa Acevedo)	never	—	✓	✓	✓
<b>Data Entry</b>	<b>t.cri.redcap1</b> (Julissa Acevedo)	never	—	✗	✗	✗
	<b>t.cri.redcap2</b> (Julissa Acevedo)	never	—	✗	✗	✗

# ▶ Data Access Groups

Project Home

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.



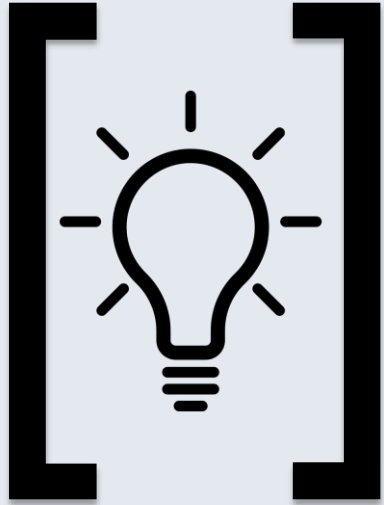
(e.g., Project Manager, Data Entry Person)

data  
access  
groups

Role name (click role name to edit role)	Username or users assigned to a role (click username to edit or assign to role)	Expiration (click expiration to edit)	Data Access Group (click DAG to assign user)	Project Design and Setup	User Rights	Data Access Groups
<b>Project Manager</b>	<b>jacevedo</b> (Julissa Acevedo)	never	—	✓	✓	✓
<b>Data Entry</b>	<b>t.cri.redcap1</b> (Julissa Acevedo)	never	Lurie	✗	✗	✗
	<b>t.cri.redcap2</b> (Julissa Acevedo)	never	UIC	✗	✗	✗



Live Demo



# Advanced Features

# Advanced Features

Project Home | Project Setup | Other Functionality | Project Revision History | Edit project settings

Project status: Development Completed steps 0 of 8

### Main project settings

Not started

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

Disable  Use longitudinal data collection with defined events?

### Design your data collection instruments & enable your surveys

Not started

Add or edit fields on your data collection instruments (survey and form) either using the Online Designer (online method) or by uploading a Data Dictionary (offline method). You may then enable your instruments to be used as survey instruments. Quick links: [Download PDF of all instruments](#) OR [Download the current instruments](#)

Go to  or  [Explore the Online Designer](#)

Have you checked the [Check For Identifiers](#) page to ensure all identifier fields are properly defined?

Learn how to use

- ### 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
  - API and API Playground
  - REDCap Mobile App
  - External Modules
  - How To: Advanced Coding
  - How To: Calculations
  - How To: Survey Wizard
  - How To: Adding Users
  - UChicago REDCap Website

# Smart Variables

## Edit 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:** Descriptive Text (with optional Image/Video/ )

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

**Field Label**  
This record was entered by: [record-dag-label]

**Action Tags / Field Annotation** (optional)  
  
Learn about [@ Action Tags](#) or [using Field Annotation](#)

**Variable Name** (utilized in logic, calcs, and exports)  
  Enable auto naming of variable based upon its Field Label?  
ONLY letters, numbers, and underscores

How to use [Smart Variables](#) [Piping](#)

Optional file attachment, image, audio, or video:

**Embed an external video** (provide video URL)

e.g. <https://youtube.com/watch?v=E1cCuWMupz0>,  
<https://vimeo.com/62730281>,  
<http://example.com/movie.mp4>

Display format of video:  Inline  Inside popup

# ↳ Piping

before

What is your favorite ice cream?

Chocolate  
 Vanilla  
 Strawberry

reset





---

How much do you love \_\_\_\_\_ ice cream?

Hate it Indifferent I love \_\_\_\_\_!

Click bar above and then drag to set response

setup

    Variable: slider

Hate it Indifferent I love [ice\_cream]!

How much do you love [ice\_cream] ice cream?

Click bar above and then drag to set response

reset

after

What is your favorite ice cream?

Chocolate  
 Vanilla  
 Strawberry

reset

---

How much do you love Chocolate ice cream?

Hate it Indifferent I love Chocolate!

Click bar above and then drag to set response

# ▶ Action Tags

### Edit 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:** Yes - No ▼

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

**Field Label**

**Choices (not modifiable)**  
1, Yes  
0, No

**Action Tags / Field Annotation** (optional)

Learn about [@ Action Tags](#) or [Creating Field Annotation](#)

**Variable Name** (utilized in logic, calcs, and exports)  
  Enable auto naming of variable based upon its Field Label?  
ONLY letters, numbers, and underscores

How to use [Smart Variables](#) [Piping](#)

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

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

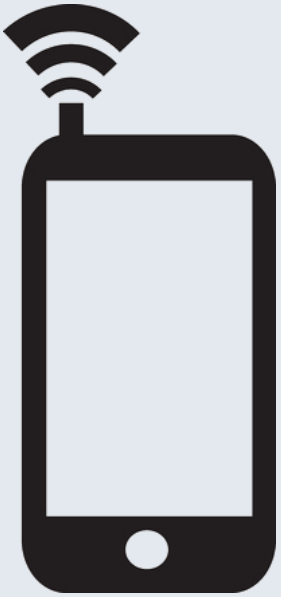
**Custom Alignment** Right / Vertical (RV) ▼  
Align the position of the field on the page

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

List of  
Action  
Tags



Live Demo



# Smart Devices

# Smart Devices



REDCap is compatible with:

- iPhones and iPads
- Android tablets and smart phones
- Simply go to <https://redcap.uchicago.edu/>

# ‡ Mobile App

But for offline data collection (no internet)...



REDCap



App Store

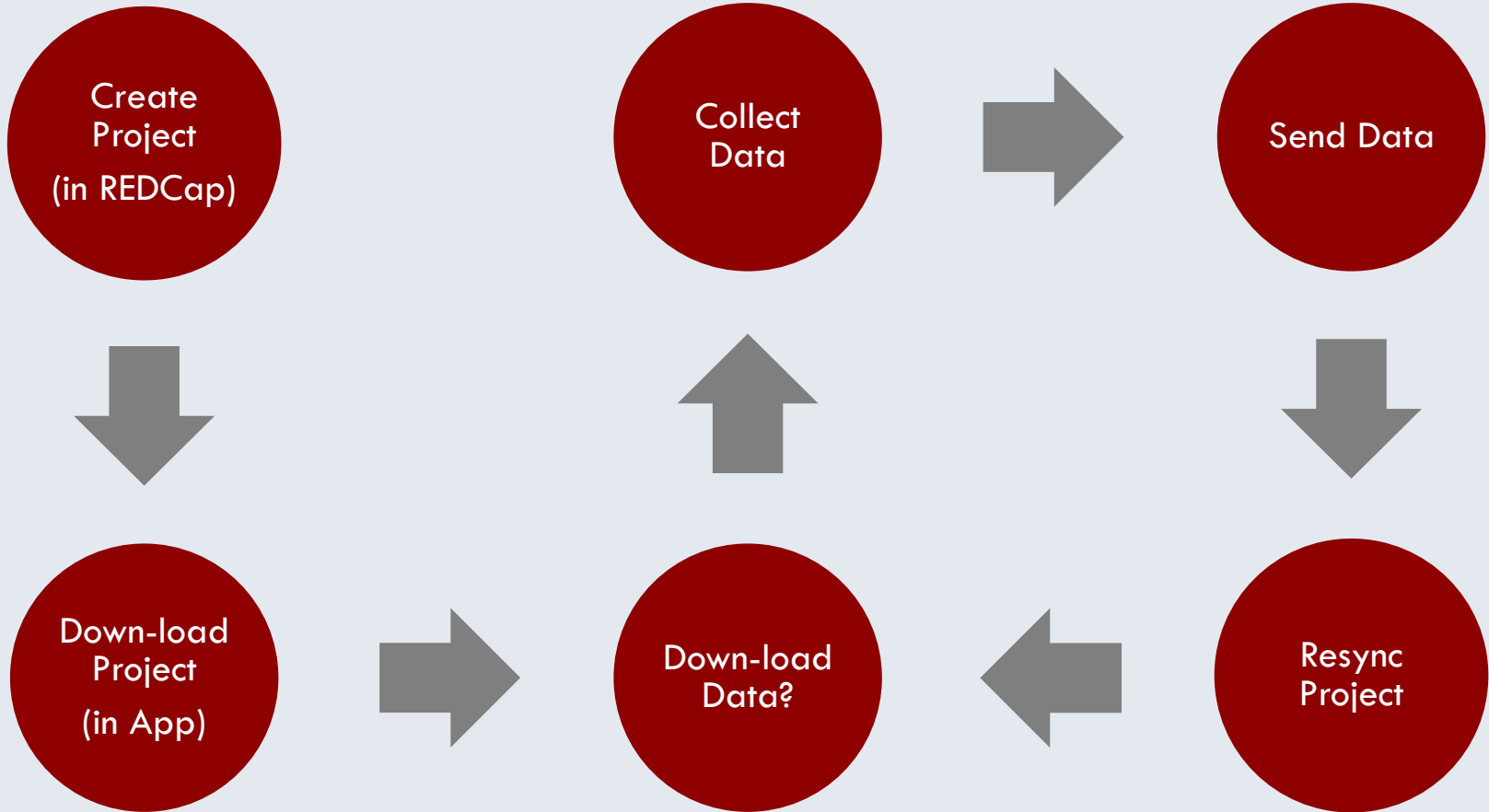


Google play

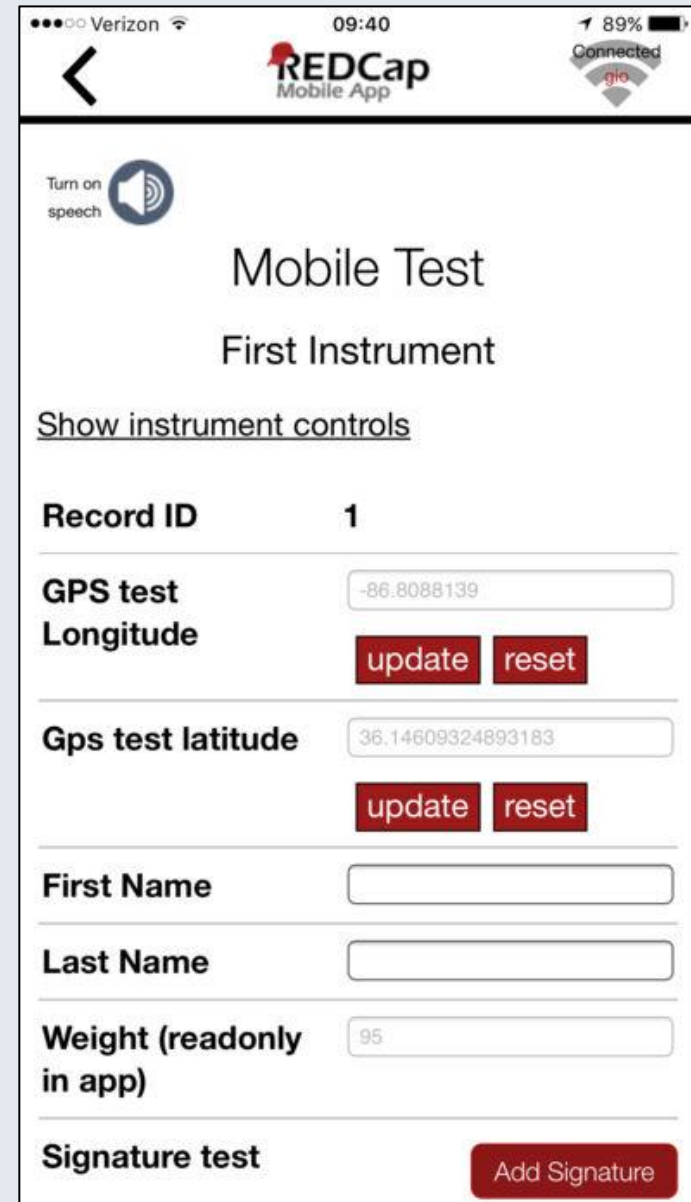
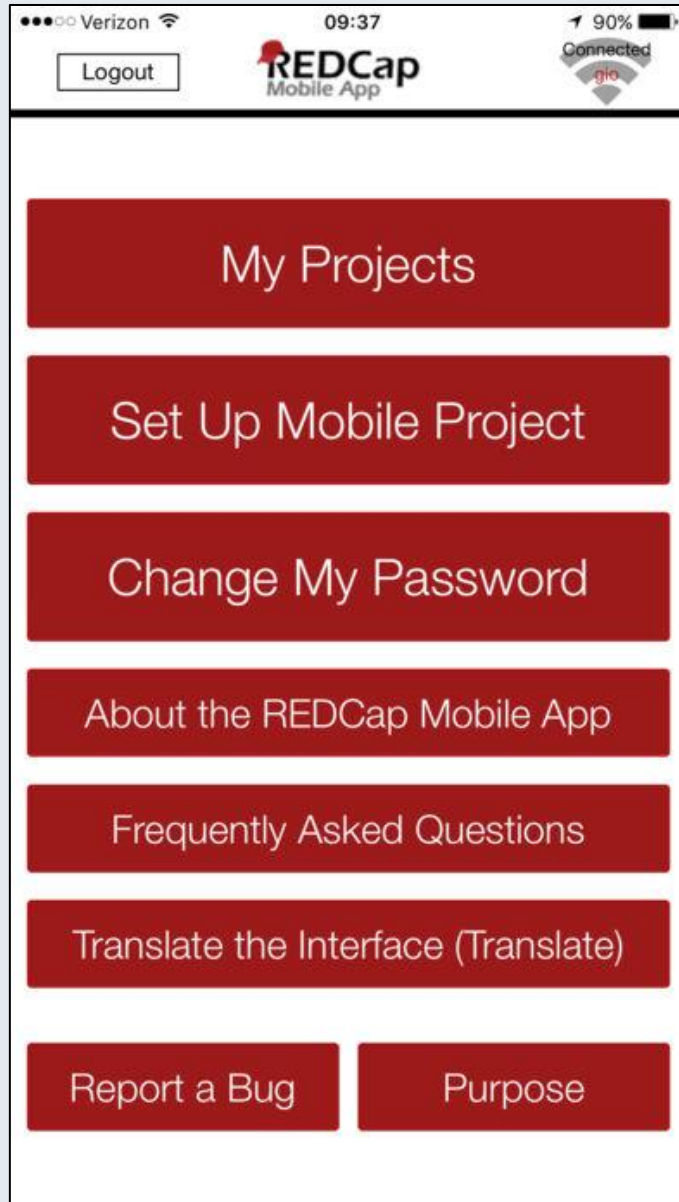
*\*not available for:*



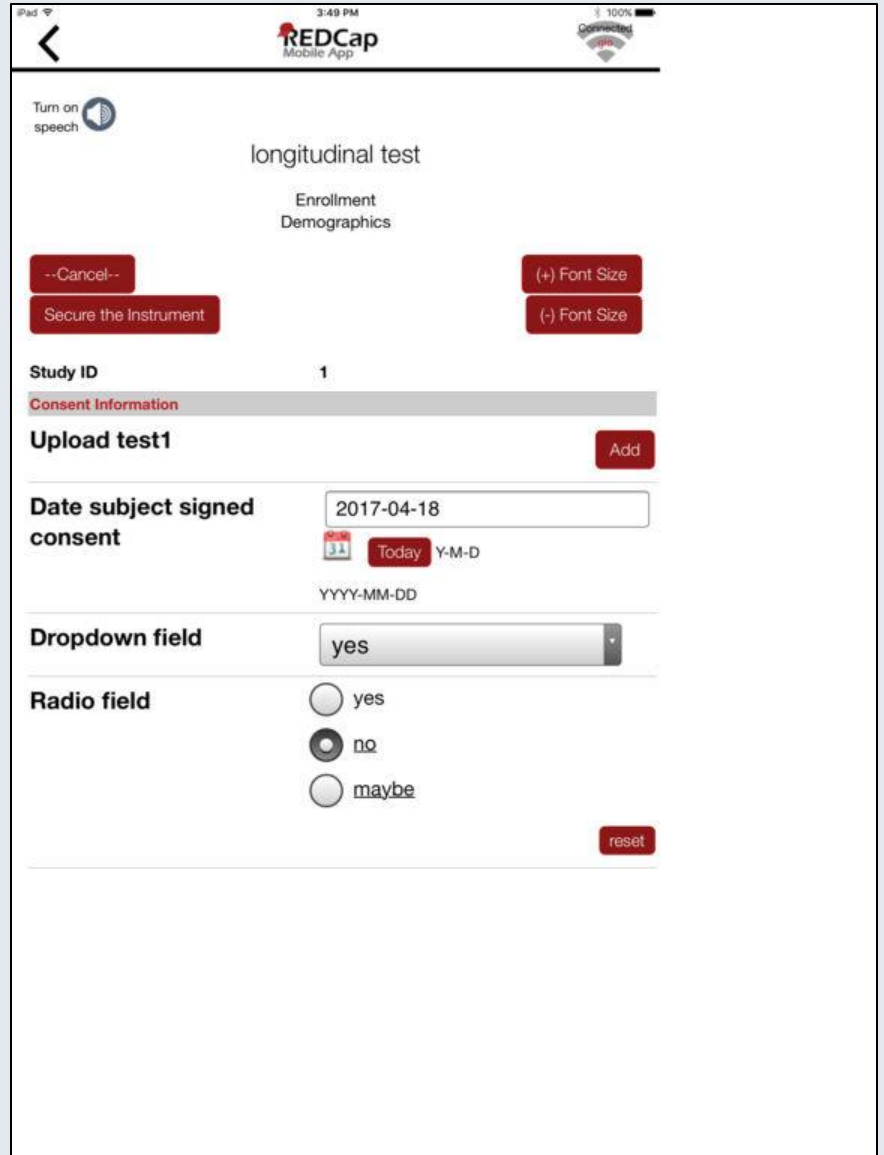
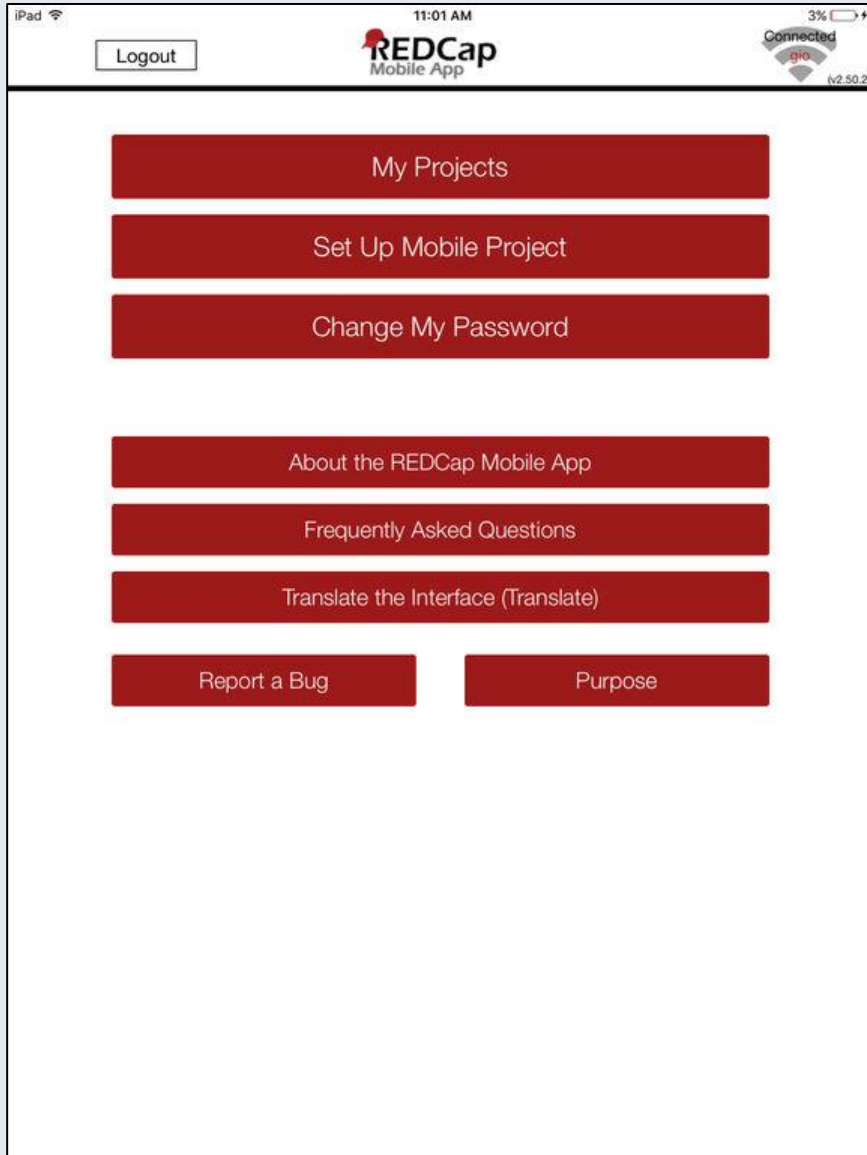
# Mobile App - Process



# Mobile App - iPhone



# Mobile App - iPad





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](mailto: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/)

# Making the Most of REDCap: All About Surveys

- Thursday, July 11<sup>th</sup>, 2019
- KCDB 1103
- Time TBD
- <https://cri.uchicago.edu/seminar-series/>



Questions?



Thank you!