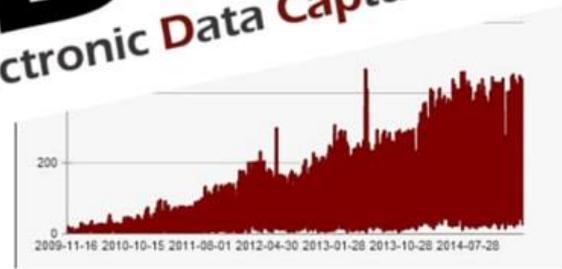


Introduction to



THE UNIVERSITY OF
CHICAGO MEDICINE &
BIOLOGICAL SCIENCES



CENTER FOR
RESEARCH
INFORMATICS

Presenter: Julissa Acevedo
Senior Systems Analyst / REDCap Administrator



SEMINAR
SERIES

Introduction to REDCap

11/19/19

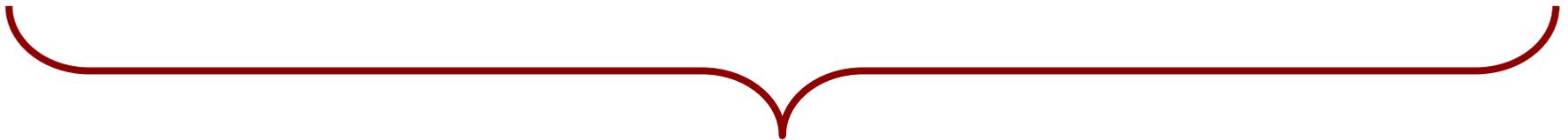
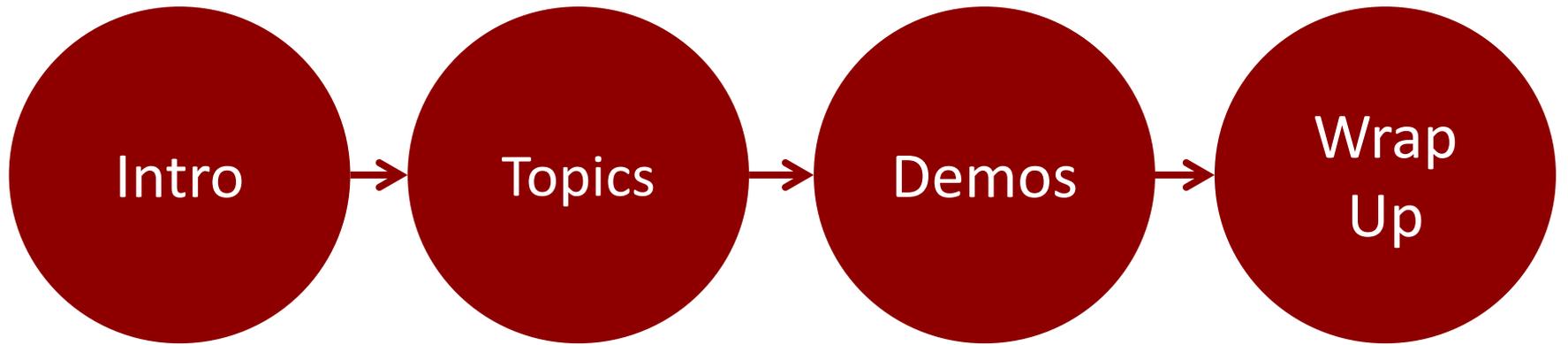
Beyond the REDCap Basics

2/20/20

All About REDCap Surveys

4/14/20

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



Intro

Topics

Demos

Wrap
Up

Questions

WHO IS THE CRI?



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

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.

REDCAP HISTORY

THEN

2004: Created at Vanderbilt

2006: Global consortium

2011: University of Chicago

2011: CRI Created

2012: REDCap at UChicago

NOW

Worldwide:

3,700 institutions

131 countries

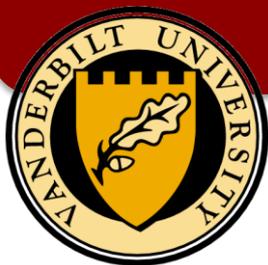
793,000 projects

1,000,000 users

UChicago:

5,400 projects

5,600 users



▶ 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

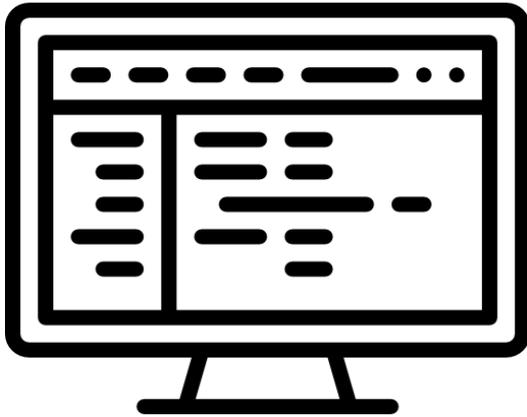
- Enabling surveys
- Settings & customizations
- Public link vs private links

Applications & Tools

- Record status dashboard
- Project change log
- Exports and reports
- Data dictionary
- File repository



Messenger
Smart Devices
Mobile App



Project Setup

WHERE IS REDCAP?

cri.uchicago.edu

CENTER FOR RESEARCH INFORMATICS

Services - Research - Education - About - Q

WELCOME TO THE CRI
AT THE UNIVERSITY OF CHICAGO

WHO WE ARE WHAT WE DO

GET STARTED NOW

- ACQUIRE DATA**
Explore clinical data available for research and make a data request.
Clinical Research Data Warehouse
Cancer 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

cri.uchicago.edu/redcap

CENTER FOR RESEARCH INFORMATICS

Services - Research - Education - About - Q

REDCap
Research Electronic Data Capture

powered by the CRI

The CRI is proud to offer REDCap, a self-managed, secure, web-based solution designed to support data collection strategies for research studies.

QUICK LINKS

- About REDCap
- Where to Start
- Accounts & Passwords
- Training
- Request Help
- CONTACT
- Log In
- LOG IN TO REDCAP**

NEWS

AUG 29
Successful REDCapCon draws to a close

The CRI and University of Chicago wrapped up a successful REDCapCon last week. The CRI was honored to host this important three-day event, which brings together REDCap administrators and all over the world for education and networking. This year was the tenth annual meeting and one of the largest gatherings to date, with 327 attendees from 201 institutions representing 20 countries across 6 continents.

redcap.uchicago.edu

REDCapTM

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:

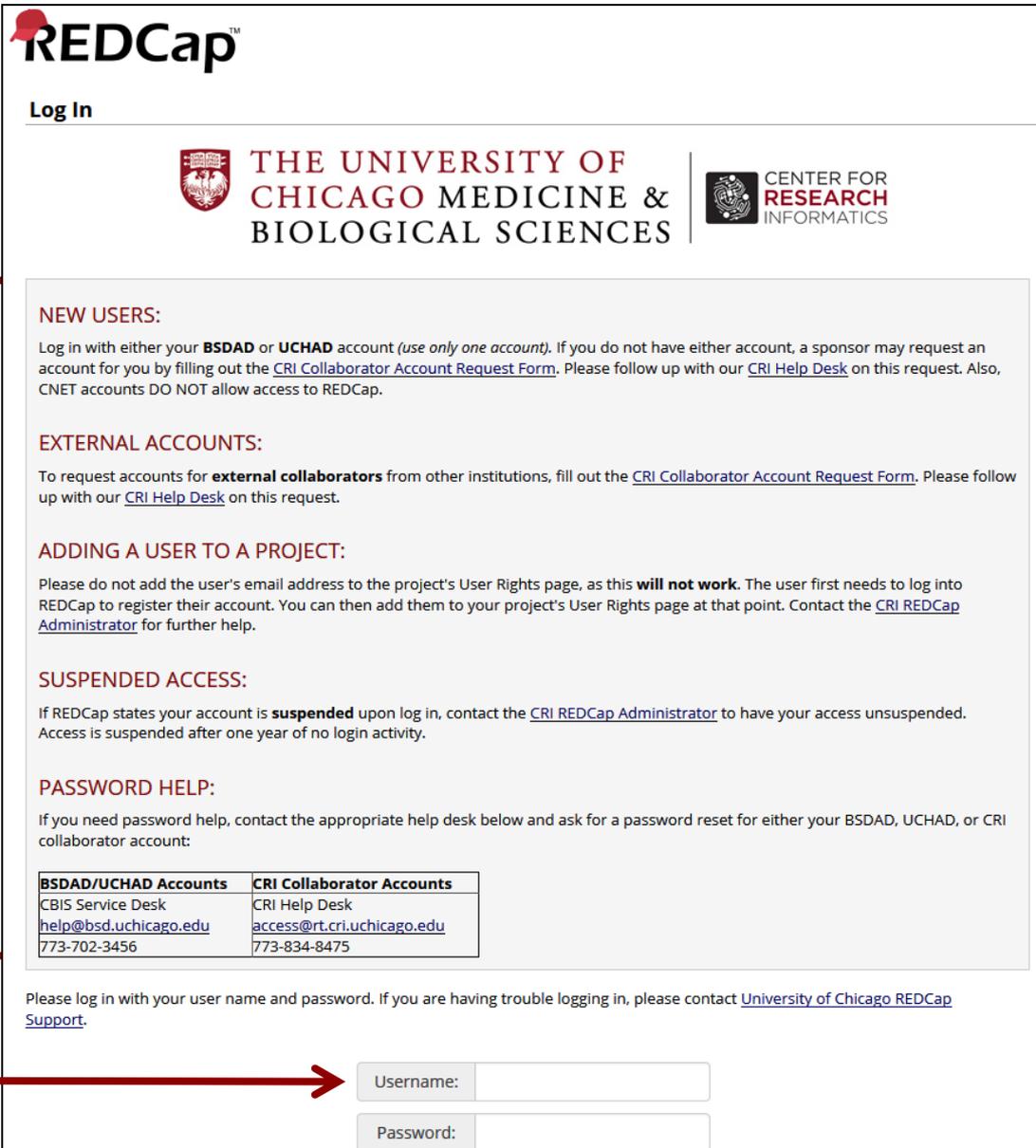
BSDAD/UCHAD Accounts	CRI Collaborator Accounts
CBIS Service Desk help@bsd.uchicago.edu 773-702-3456	CRI Help Desk access@rt.cri.uchicago.edu 773-834-8475

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:

LOGGING INTO REDCAP



REDCap™

Log In

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

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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](#).

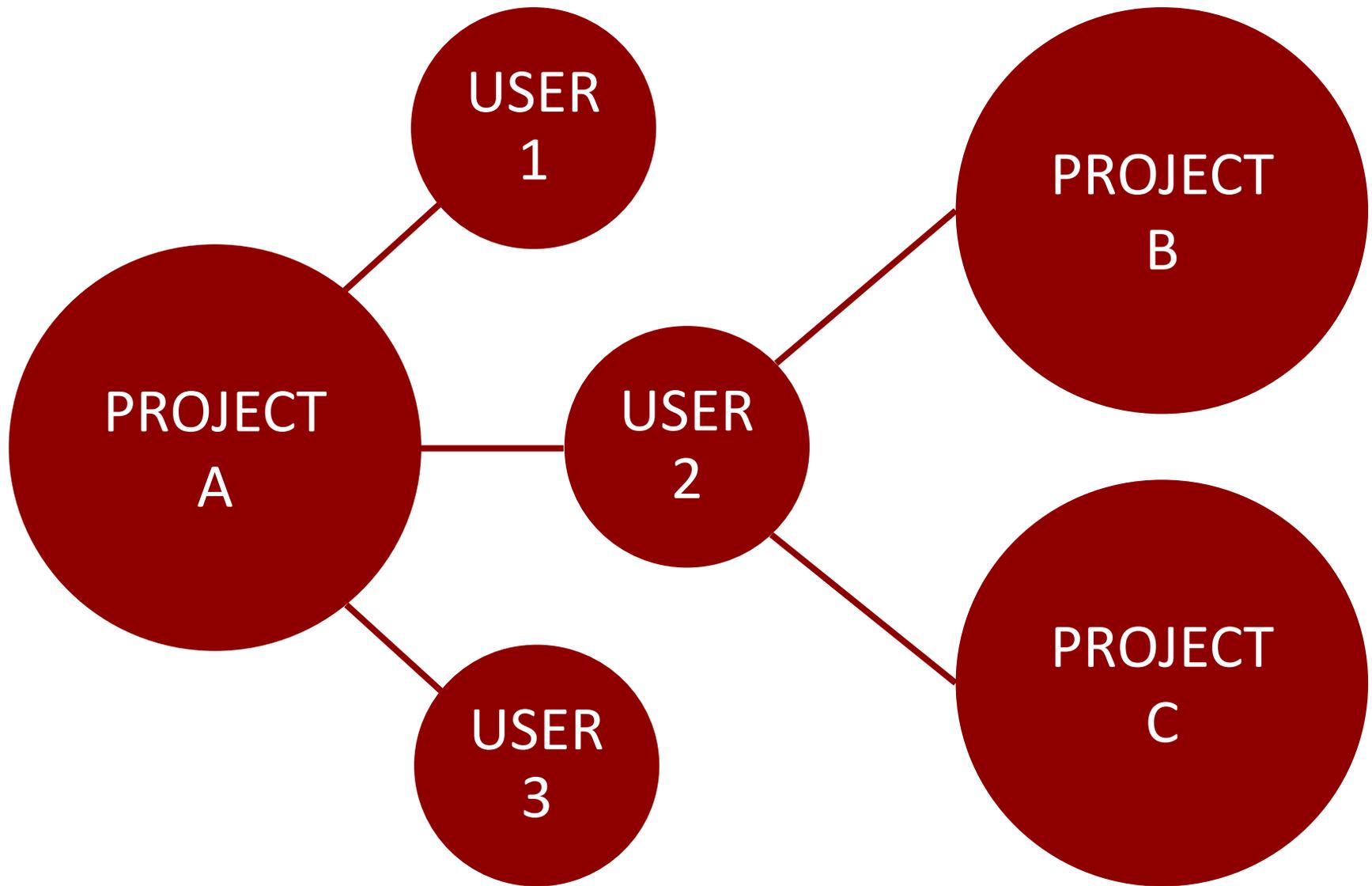
Username:

Password:

HELPFUL
INFORMATION!

BSDAD or UCHAD

ACCESS EXPLAINED



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.

TRAINING VIDEOS



REDCap Training Videos

Just Getting Started?

Explore these overviews of fundamental concepts and features.

Title	Description	Watch Video
Brief Overview	A quick summary of what REDCap is and what it can do.	 4 minutes
Detailed Overview	This video provides an overview of basic functions and features within a REDCap project. It will serve as a starting point for learning about the basic concepts of REDCap, what REDCap projects are, how to create them, and how to use them.	 14 minutes
Data Entry Overview	A focused exploration of basic data entry workflow. Suitable for training data entry staff.	 19 minutes

Building a Project

Learn how to build and modify data collection instruments.

Title	Description	Watch Video
Introduction to Instrument Development	An introduction to the Online Designer and Data Dictionary methods of instrument development.	 6 minutes
Online Designer	This online tool is the quickest and most intuitive method for making instrument modifications.	 5 minutes

** Use Chrome, not IE or Firefox.*

CREATE A PROJECT



Home My Projects

+ New Project

Help & FAQ

Training Videos

Send-It

Messenger

Logged in as
t.cri.redcap1

My Profile

Log out

+ 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?

---- Select One ----

Project notes (optional):

Comments describing the project's use or purpose that are displayed on the My Projects page.

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)

<small>select template</small>	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"/>		Contains nine data entry forms (beginning with a demography form) for collecting data on

Create Project

Cancel

PROJECT SETUP STEPS



Logged in as **t.cri.redcap1** | [Log out](#)

[My Projects](#)

[Project Home](#) or [Project Setup](#)

[REDCap Messenger](#)

Project status: **Development**

Data Collection [Edit instruments](#)

[Record Status Dashboard](#)
- View data collection status of all records

[Add / Edit Records](#)
- Create new records or edit/view existing ones

Show data collection instruments

Applications

- [Calendar](#)
- [Data Exports, Reports, and Stats](#)
- [Field Comment Log](#)
- [File Repository](#)
- [User Rights](#)
- [How To: Advanced Coding](#)
- [How To: Calculations](#)
- [How To: Survey Wizard](#)
- [How To: Adding Users](#)
- [UChicago REDCap Website](#)

Help & Information

- [Help & FAQ](#)
- [Video Tutorials](#)
- [Suggest a New Feature](#)

[Contact REDCap administrator](#)

Training Project

[Project Home](#)

[Project Setup](#)

[Other Functionality](#)

[Project Revision History](#)

Project status: [Development](#)

Completed steps 1 of 7



[Not complete?](#)

Main project settings

Enable

Use surveys in this project? [?](#)

 [VIDEO: How to create and manage a survey](#)

Enable

Use longitudinal data collection with defined events? [?](#)

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



Not started

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](#)

[I'm done!](#)

Go to

[Online Designer](#)

OR

[Data Dictionary](#)

Explore the

[REDCap Shared Library](#)

Have you checked the [Check For Identifiers](#) page to ensure all identifier fields have been tagged?

Learn how to use

[Smart Variables](#)

[Piping](#)

[@ Action Tags](#)



Optional

[I'm done!](#)

Enable optional modules and customizations

Enable

Repeatable instruments [?](#)

Disable

Auto-numbering for records [?](#)

Enable

Scheduling module (longitudinal only) [?](#)

Enable

Randomization module [?](#)

Enable

Designate an email field for sending survey invitations [?](#)

[Additional customizations](#)

STEP 1: MAIN PROJECT SETTINGS



Complete!

Not complete?

Main project settings

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

Enable Use longitudinal data collection with defined events? [?](#)

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



Not started

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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](#)

[I'm done!](#) Go to [Online Designer](#) or [Data Dictionary](#) Explore the [REDCap Shared Library](#)

Have you checked the [Check For Identifiers](#) page to ensure all identifier fields have been tagged?

Learn how to use [Smart Variables](#) [Piping](#) [@ Action Tags](#)



Optional

[I'm done!](#)

Enable optional modules and customizations

Enable [Repeatable instruments](#) [?](#)

Disable [Auto-numbering for records](#) [?](#)

Enable [Scheduling module \(longitudinal only\)](#) [?](#)

Enable [Randomization module](#) [?](#)

Enable [Designate an email field for sending survey invitations](#) [?](#)

[Additional customizations](#)



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](#)



Optional

[I'm done!](#)

User Rights and Permissions

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

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



Not started

[I'm done!](#)

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.



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 be auto-approved or else might need to be approved by a REDCap administrator before taking effect.

Go to [Move project to production](#)

- Modify project title, purpose, etc.
- Enable surveys
- Enable longitudinal data collection

STEP 2: DATA COLLECTION INSTRUMENTS

Main project settings

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

Complete! Use longitudinal data collection with defined events?

Not complete?

Design your data collection instruments

Complete! 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](#)

Not complete? Explore the [REDCap Shared Library](#)

Have you checked the [Check For Identifiers](#) page to ensure all identifier fields have been tagged?

Learn how to use: [Smart Variables](#) [Piping](#) [Action Tags](#)

Enable optional modules and customizations

Optional Repeatable instruments

Optional Auto-numbering for records

Optional Scheduling module (longitudinal only)

Optional Randomization module

Optional Designate an email field for sending survey invitations

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

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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

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Not started

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Go to

- Online Designer
- Data Dictionary*
- Shared Library (Global)
- Special Features*

- Smart Variables
- Piping
- Action Tags

* *(covered in next seminar)*

ONLINE DESIGNER

Project Home

Project Setup

Online Designer

Data Dictionary

Create snapshot of instruments

Last snapshot: never

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
My First Instrument	1		Choose action

[+ Add instrument here](#)

RECORD IDENTIFIER

 Project Home

 Project Setup

 Online Designer

 Data Dictionary

 Create snapshot of instruments

Last snapshot: never 

 [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. *Are you using Action Tags yet? If not, [learn about Action Tags here](#).*

 [Return to list of instruments](#)

Current instrument: **My First Instrument**

[Preview instrument](#)

 Variable: record_id

Record ID

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

[Add Field](#)

[Add Matrix of Fields](#)

FIELD TYPES

 Variable: record_id

Record ID

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

Add Field **Add Matrix of Fields**

Add New Field ✕

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

Field Type: **--- Select a Type of Field ---**

- Text Box (Short Text, Number, Date/Time, ...)
- Notes Box (Paragraph Text)
- Calculated Field
- Multiple Choice - Drop-down List (Single Answer)
- Multiple Choice - Radio Buttons (Single Answer)
- Checkboxes (Multiple Answers)
- Yes - No
- True - False
- Signature (draw signature with mouse or finger)
- File Upload (for users to upload files)
- Slider / Visual Analog Scale
- Descriptive Text (with optional Image/Video/Audio/File Attachment)
- Begin New Section (with optional text)

FIELD DESIGN

Add New Field ✕

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

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

Field 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](#)

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

-- or --

-- select ontology service -- ▼

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

 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](#)



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				

EDIT/COPY/MOVE/DELETE FIELDS

Current instrument: **My First Instrument**

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](#)

     Variable: first_name

First Name

[Add Field](#) [Add Matrix of Fields](#)

- pencil = edit
- 2 papers = copy
- green arrows = branching logic
- paper w/arrow = move
- red x = delete

BRANCHING LOGIC

Variable: fav_ice_cream

What is your favorite ice cream?

Chocolate
 Strawberry
 Vanilla
 Other

reset

Add Field Add Matrix of Fields

Variable: fav_ice_cream_other

If other, please specify:

Add Field Add Matrix of Fields

Drag-N-Drop Logic Builder

Field choices from other fields
(drag a choice below to box on right)

record_id = (define criteria)
first_name = (define criteria)
fav_ice_cream = Chocolate (1)
fav_ice_cream = Strawberry (2)
fav_ice_cream = Vanilla (3)
fav_ice_cream = Other (4)
my_first_instrument_complete = Incomplete (0)
mv_first_instrument_complete = Unverified

Drag and Drop

Show the field ONLY if...

ALL below are true
 ANY below are true

fav_ice_cream = Other (4) ✖

[Clear logic](#)

STEP 3: OPTIONAL MODULES & CUSTOMIZATIONS

 **Complete!**

Main project settings

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

Enable Use longitudinal data collection with defined events? [?](#)

[Not complete?](#)

 **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 or Explore the

Have you checked the [Check For Identifiers](#) page to ensure all identifier fields have been tagged?

Learn how to use [Smart Variables](#) [Piping](#) [@ Action Tags](#)

 **Complete!**

Enable optional modules and customizations

Enable Repeatable instruments [?](#)

Disable Auto-numbering for records [?](#)

Enable Scheduling module (longitudinal only) [?](#)

Enable Randomization module [?](#)

Enable Designate an email field for sending survey invitations [?](#)

 **Optional**

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

 **Optional**

User Rights and Permissions

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

 **Not started**

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.

 **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 be auto-approved or else might need to be approved by a REDCap administrator before taking effect.

Go to

- Repeatable Instruments*
- Auto-numbering IDs
- Scheduling (Longitudinal)*
- Randomization*
- Designate an email for survey invitations*

* *(covered in next seminar)*

STEP 4: PROJECT BOOKMARKS (OPTIONAL)

Main project settings

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

Complete! Use longitudinal data collection with defined events? [?](#)

Not complete?

Design your data collection instruments

Complete! 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](#)

Not complete? Go to [Online Designer](#) or [Data Dictionary](#) Explore the [REDCap Shared Library](#)

Have you checked the [Check For Identifiers](#) page to ensure all identifier fields have been tagged?

Learn how to use [Smart Variables](#) [Piping](#) [@ Action Tags](#)

Enable optional modules and customizations

Complete! Repeatable instruments [?](#)

Complete! Auto-numbering for records [?](#)

Not complete? Scheduling module (longitudinal only) [?](#)

Complete! Randomization module [?](#)

Complete! Designate an email field for sending survey invitations [?](#)

Additional customizations

Set up project bookmarks (optional)

Complete! 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.

Not complete? Go to [Add or edit bookmarks](#)

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.

I'm done! Go to [User Rights](#) or [Data Access Groups](#)

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.

I'm done!

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 be auto-approved or else might need to be approved by a REDCap administrator before taking effect.

Go to [Move project to production](#)

- Custom bookmarks
- Appear in Applications menu on the left
- Accessible by all project users
- Example:
 - Department website
 - Study survey
 - External website

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

 **Complete!**
Not complete?

Main project settings

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

Enable Use longitudinal data collection with defined events? [?](#)

 **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](#) Explore the [REDCap Shared Library](#)

Have you checked the [Check For Identifiers](#) page to ensure all identifier fields have been tagged?

Learn how to use [Smart Variables](#) [Piping](#) [Action Tags](#)

 **Complete!**
Not complete?

Enable optional modules and customizations

Enable Repeatable instruments [?](#)

Disable Auto-numbering for records [?](#)

Enable Scheduling module (longitudinal only) [?](#)

Enable Randomization module [?](#)

Enable Designate an email field for sending survey invitations [?](#)

 **Complete!**
Not complete?

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

 **Complete!**
Not complete?

User Rights and Permissions

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Go to or

 **Not started**

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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.

 **Not started**

Move your project to production status

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Go to

- Add users to your project with custom user rights
 - Data Access Groups*
- * *(covered in next seminar)*

STEP 5: ADDING USERS

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.



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



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

Basic Rights



Expiration Date

(if applicable)

(YYYY)

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



Add / Edit Reports



Stats & Charts



Other privileges:



Manage Survey



Participants



Calendar



Data Import Tool



Data Comparison Tool



Logging



File Repository



Data Quality



[What is Data Quality?](#)

Create & edit rules



Execute rules



API



[What is the REDCap API?](#)

API Export



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?

STEP 6: TEST YOUR PROJECT

 **Complete!**
Not complete?

Main project settings

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

Enable Use longitudinal data collection with defined events? [?](#)

 **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 or Explore the

Have you checked the [Check For Identifiers](#) page to ensure all identifier fields have been tagged?

Learn how to use [Smart Variables](#) [Piping](#) [Action Tags](#)

 **Complete!**
Not complete?

Enable optional modules and customizations

Enable Repeatable instruments [?](#)

Auto-numbering for records [?](#)

Enable Scheduling module (longitudinal only) [?](#)

Enable Randomization module [?](#)

Enable Designate an email field for sending survey invitations [?](#)

 **Complete!**
Not complete?

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

 **Complete!**
Not complete?

User Rights and Permissions

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Go to or

 **Complete!**
Not complete?

Test your project thoroughly

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 **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 be auto-approved or else might need to be approved by a REDCap administrator before taking effect.

Go to

- Enter test records
- Test branching logic
- Test calculations
- Create reports
- Export test data
- Have colleagues review project as well

STEP 7: MOVE TO PRODUCTION

 **Complete!**

Main project settings

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

Enable Use longitudinal data collection with defined events? [?](#)

Not complete?

 **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 or Explore the

Have you checked the [Check For Identifiers](#) page to ensure all identifier fields have been tagged?

Learn how to use [Smart Variables](#) [Piping](#) [Action Tags](#)

 **Complete!**

Enable optional modules and customizations

Enable Repeatable instruments [?](#)

Disable Auto-numbering for records [?](#)

Enable Scheduling module (longitudinal only) [?](#)

Enable Randomization module [?](#)

Enable Designate an email field for sending survey invitations [?](#)

Not complete?

 **Complete!**

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

 **Complete!**

User Rights and Permissions

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

 **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.

 **Not started**

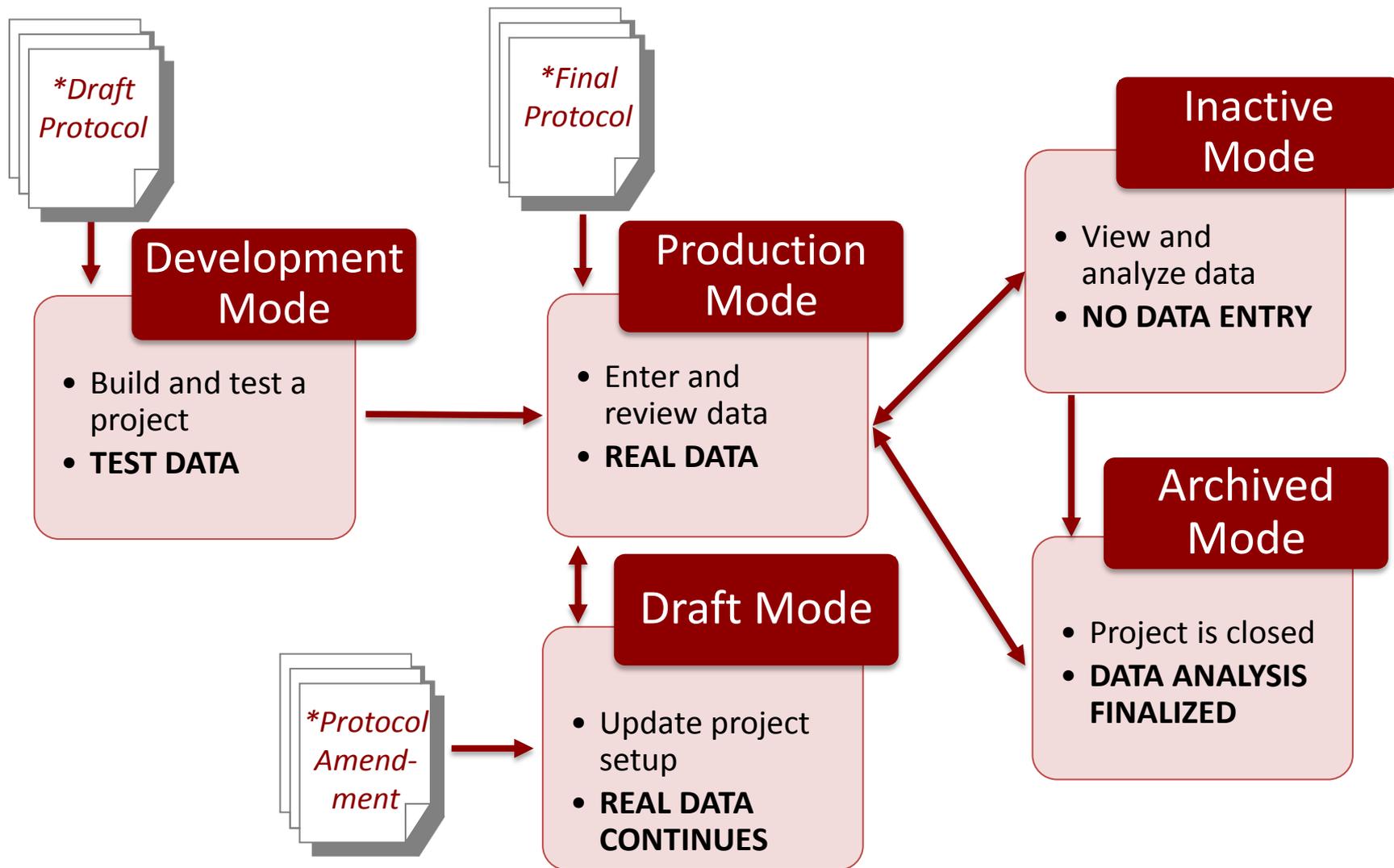
Move your project to production status

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 be auto-approved or else might need to be approved by a REDCap administrator before taking effect.

Go to

- Delete test data
- Wait for confirmation email from Administrator before collecting real data!

PROJECT TIMELINE AND MODES



**if IRB approval required*



Using Surveys

WHAT IS A SURVEY?

A REDcap survey is a “public” version of a (form) instrument that is completed by a study participant without having to log into REDCap.

That same instrument can also be used by the study team as a data entry form when logged into REDCap.

The screenshot shows a public survey form titled "Screening Survey". At the top right, there is a "Resize font:" option with plus and minus icons. Below the title, the text reads "Please complete the survey below." and "Thank you!". The first question is "Have you given birth before?" with radio buttons for "Yes" and "No". A "reset" link is located to the right of the "No" option. The second question is "Date of Birth" with a text input field, a calendar icon, a "Today" button, and "M-D-Y" text. At the bottom center, there is a "Submit" button.

The screenshot shows the REDcap data entry form for the "Screening Survey". At the top, it says "Adding new Record ID 1". Below this, the "Record ID" is set to "1". The "Have you given birth before?" question has "Yes" selected. The "Date of Birth" field is empty. The "Form Status" section shows "Complete?" set to "Incomplete" with a dropdown arrow. There is a "Lock this record for this form?" section with a "Lock" checkbox and a lock icon. Below this, a note states: "If locked, no user will be able to edit this record on this form until someone with Lock/Unlock privileges unlocks it." At the bottom, there are three buttons: "Save & Exit Form", "Save & ..." with a dropdown arrow, and "-- Cancel --".

CREATING AND ENABLING A SURVEY

1 Enable the survey feature (Project Setup tab).

Main project settings

Not started

I'm done!

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

Enable Use longitudinal data collection with defined events? ?

Modify project title, purpose, etc.

2 Create the instrument first.

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Screening	3		Enable	Choose action	

3 Enable the instrument as a survey.

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Screening	3			Choose action	<input type="checkbox"/> Survey settings + Automated Invitations

┆ SURVEY SETTINGS

Survey Status ✔ Survey Active ▼

If offline, respondents will not be able take the survey.

Basic Survey Options:

 **Survey Title**

Sleep Study Survey

Title to be displayed to participants at the top of the survey page

 **Survey Instructions**
(Displayed at top of survey after title)

Please complete the survey below.
Thank you!

B *I* U ABC **A** ab        

 [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?

Use enhanced radio buttons and checkboxes?

(Includes Yes/No and True/False fields)

Standard radios and checkboxes

[Show example](#)

Size of survey text

Large

Font of survey text

Open Sans

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 as well as what to expect once they have completed the survey. Below is a listing of various question types to be displayed on your survey.

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

┆ SURVEY CUSTOMIZATIONS

Survey Customizations:

- Question Numbering**

Question numbers will not display correctly if using auto numbering if some questions have branching logic employed. Question auto numbering has been automatically disabled because some of your survey questions use branching logic.
- Question Display Format**
(One page or multiple pages?)

 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)
- Allow participants to download a PDF of their responses at end of survey?**
Display a button for the participant to download a PDF file of their responses for the survey they just completed.

This option will not be available if the Survey Auto-continue or Survey Queue auto-start option is enabled. Also, if a field utilizes the @HIDDEN action tag, it will not be displayed in the PDF.
- Survey-specific email invitation field**
Designate an email field for sending survey invitations for this survey only

Note: This option will override the project-level email invitation field (if enabled on the Project Setup page) and will also override any email address originally entered into the Participant List. Also, if this field has no value and the project-level email field is enabled, then the project-level email field's value will be used instead.
- For 'Required' fields, display the red 'must provide value' text on the survey page?**

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.

Additional settings:
 Minimum number of responses required before participants are allowed to view aggregate data (recommended = 10).
 Do not show plots for questions lacking diversity in response values?
([What does this mean?](#))
- 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).
NOTICE: All text that is spoken is sent to a service hosted at Vanderbilt University that utilizes the IBM Watson 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.
[Administrators: How to disable this feature](#)

▶ SURVEY ACCESS

Survey Access:

Response Limit (optional)

(Maximum number of responses to collect. Prevents respondents from starting the survey after a set number of responses have been collected.) 

 (e.g., 150) If left blank, the response limit will not be enforced.

Will include 

Custom text to display to respondent on survey when limit is reached:

Thank you for your interest; however, the survey is closed because the maximum number of responses has been reached.

Time Limit for Survey Completion (optional)

(The amount of time that each respondent has to complete the survey based on when they were initially sent the survey invitation. Note: This feature excludes public survey links.)

 days hours minutes

If the respondent loads the survey after this time has passed, it will not allow them to begin or continue the survey. (If all are left blank, the time limit will not be enforced.)

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 **11/15/2019 15:53**.

Allow 'Save & Return Later' option for respondents?

(Allow respondents to leave the survey and return later.) 

Allow respondents to return without needing a return code 

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](#)

 **PDF Auto-Archiver**
Upon survey completion, a compact PDF copy of the survey response will be automatically stored in the project's File Repository, from which the archived PDFs can be downloaded at any time.

Disabled

Enabled

 **Send confirmation email (optional)?**
(Email the respondent when they complete the survey)

No

▶ PUBLIC SURVEY LINK

The **Public Survey Link** is the simplest and fastest way to distribute a survey. The link can be published on a webpage, social media platforms, flyers, or sent in an email to a large group.

 **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

 Open public survey  Send me URL via email  Survey Access Code or  QR Code

▶ PARTICIPANT LIST

The **Participant List** allows for emailing the survey to your participants. It helps keep track of responses and non-responses.

 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

‡ TESTING IS CRITICAL!

- **Send** yourself the survey just as you would sent it to your participants.
- Make sure all the **settings** and **format** are correct.
- Export the test data to preview your **data analysis**, and modify the survey questions if needed.
- Once testing is complete, request the project be moved to **production**.
- **DO NOT SEND SURVEY EMAILS UNTIL PROJECT HAS BEEN MOVED TO PRODUCTION!**





Applications & Tools

RECORD STATUS DASHBOARD

REDCap

Logged in as jacedo | Log out

My Projects or Control Center

Project Home or Project Setup

REDCap Messenger

Project status: Production

Data Collection

Survey Distribution Tools

Record Status Dashboard

Add / Edit Records

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

Reports

Search Organize Edit

- Survey1_Module1
- Survey1_contentQs
- Other roles
- Feedback
- Feedback 6.11

Help & Information

- Help & FAQ
- Video Tutorials
- Suggest a New Feature

Contact REDCap administrator

ECE Pilot Study

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

Dashboard displayed: [Default dashboard]

Create custom dashboard

Displaying record Page 1 of 1: "1" through "29" of 27 records

ALL (27) records per page

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

Table not displaying properly

Record ID	Admin				Survey Session 1			Survey Session 2 T				Survey Session 2 C			
	ECE Screener	Consent Form	Randomization	Modules Complete	Theories of Intelligence	Module Knowledge	Speak 22item	Theories of Intelligence	Module Knowledge	Speak 22item	Post-Intervention Experience	Theories of Intelligence	Module Knowledge	Speak 22item	Pd Experience Survey
1	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Incomplete	Incomplete	Incomplete	Incomplete
2	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Incomplete	Incomplete	Incomplete	Incomplete
4	Complete	Complete	Complete	Incomplete	Complete	Complete	Complete	Incomplete	Incomplete	Incomplete	Incomplete	Incomplete	Incomplete	Incomplete	Incomplete
5	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Incomplete	Incomplete	Incomplete	Incomplete
6	Complete	Complete	Complete	Incomplete	Complete	Complete	Complete	Incomplete	Incomplete	Incomplete	Incomplete	Incomplete	Incomplete	Incomplete	Incomplete
7	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Incomplete	Incomplete	Incomplete	Incomplete
8	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Incomplete	Incomplete	Incomplete	Incomplete
9	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Incomplete	Incomplete	Incomplete	Incomplete
11	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Incomplete	Incomplete	Incomplete	Incomplete
12	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Incomplete	Incomplete	Incomplete	Incomplete
13	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Incomplete	Incomplete	Incomplete	Incomplete
14	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Incomplete	Incomplete	Incomplete	Incomplete
15	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Incomplete	Incomplete	Incomplete	Incomplete
16	Complete	Complete	Complete	Incomplete	Complete	Complete	Complete	Incomplete	Incomplete	Incomplete	Incomplete	Incomplete	Incomplete	Incomplete	Incomplete
17	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Incomplete	Incomplete	Incomplete	Incomplete
18	Complete	Complete	Complete	Incomplete	Complete	Complete	Complete	Incomplete	Incomplete	Incomplete	Incomplete	Incomplete	Incomplete	Incomplete	Incomplete
19	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Incomplete	Incomplete	Incomplete	Incomplete
20	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Incomplete	Incomplete	Incomplete	Incomplete
21	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Incomplete	Incomplete	Incomplete	Incomplete

PROJECT CHANGE LOG

REDCap™

Logged in as **jacevedo** | [Log out](#)

[My Projects](#) or [Control Center](#)

[Project Home](#) or [Project Setup](#)

[REDCap Messenger](#)

Project status: **Development**

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- Logging**
- Field Comment Log
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- Record Locking Customization
- E-signature and Locking Mgmt
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- REDCap Mobile App
- External Modules
- How To: Advanced Coding
- How To: Calculations
- How To: Survey Wizard
- How To: Adding Users
- UChicago REDCap Website

Help & Information

- Help & FAQ
- Video Tutorials
- Suggest a New Feature

[Contact REDCap administrator](#)

Training Project

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: All event types (excluding page views) ▼

Filter by user name: All users ▼

Filter by record: All records ▼

Filter by time range from: [] to []

Displaying events (by most recent): 1 - 100 (Page 1 of 4) ▼

Time / Date	Username	Action	List of Data Changes OR Fields Exported
07/10/2019 6:55pm	jacevedo	Manage/Design	Modify project settings
07/10/2019 6:55pm	jacevedo	Updated Record 1002	test_complete = '2'
07/10/2019 6:54pm	jacevedo	Updated Record 1001	test_complete = '2'
07/10/2019 6:54pm	jacevedo	Deleted Record 999	record_id = '999'
06/10/2019 4:33pm	[survey respondent]	Created Response 1004	mon = '1', tue = '1', wed = '1', thu = '1', fri = '1', record_id = '1004', test_complete = '0'
06/10/2019 4:32pm	jacevedo	Manage/Design	Modify survey info
06/10/2019 4:32pm	[survey respondent]	Created Response 1003	mon = '1', tue = '1', wed = '1', thu = '1', fri = '1', record_id = '1003', test_complete = '0'
06/10/2019 4:24pm	jacevedo	Manage/Design	Modify survey info
06/10/2019 4:23pm	[survey respondent]	Updated Response 1002	mon = '2'
06/10/2019 4:22pm	[survey respondent]	Created Response 1002	mon = '1', tue = '1', wed = '1',

DATA EXPORTS, REPORTS, AND STATS



Logged in as **Jacevedo** | Log out

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Training Project

Data Exports, Reports, and Stats

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

[+ Create New Report](#)

[My Reports & Exports](#)

[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

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UChicago REDCap Website

Reports | Search | Organize | Edit
List of Participants Who Like Chocolate Ice Cream

Help & Information
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Video Tutorials
Suggest a New Feature
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Name of Report: List of Participants Who Like Chocolate Ice Cream

Description (optional):
Displayed on page below report name
HTML may be used in order to add links or to add style to text. Expand

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)

STEP 2

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

Field 1	record_id "Record ID"	Instrument: Ice Cream Survey
Field 2	first_name "First Name"	Instrument: Ice Cream Survey
Field 3	Type variable name or field label	Instrument:

Additional report options (optional)
 Combine checkbox options into single column of only the checked-off options (will be formatted as a text field when exported to stats packages)

STEP 3

Filters (optional)

Filter 1: fav_ice_

AND

Filter 2: -- select

Switch format: [Use advanced](#)

Live Filters (optional)

Live Filter 1: -- select

Live Filter 2: -- select

Live Filter 3: -- select

[Create New Report](#) | [My Reports & Exports](#) | [Other Export Options](#) | [View Report: List of Participants Who Like Chocolate Ice Cream](#)

Number of results returned: 3
Total number of records queried: 5

[Stats & Charts](#) | [Export Report](#) | [Print Page](#) | [Edit Report](#)

List of Participants Who Like Chocolate Ice Cream

Record ID	First Name
record_id	first_name
2	Mary
3	John
5	Sue

STEP 4

Order the Results (optional)

First by: record_id "Record ID" | Ascending order

Then by: Type variable name or field label | Ascending order

Then by: Type variable name or field label | Ascending order

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

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

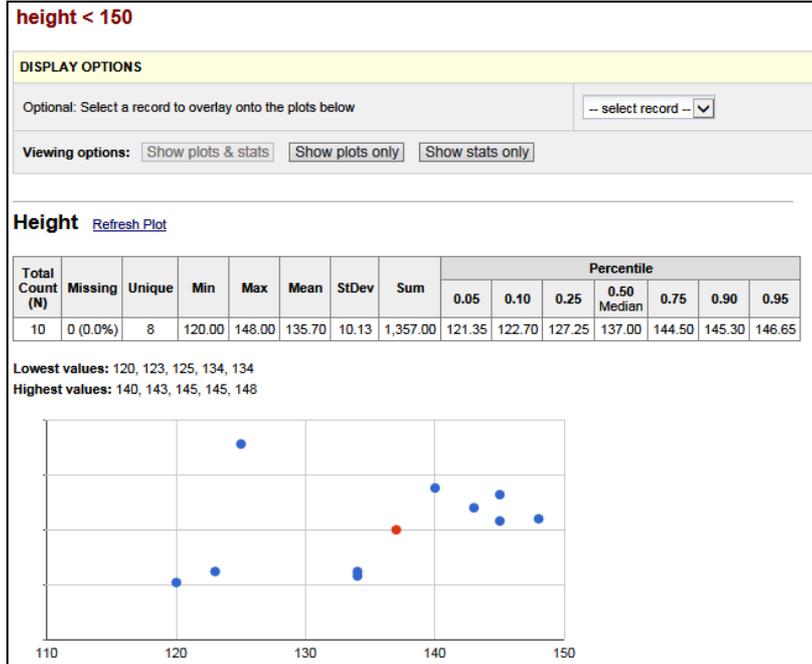
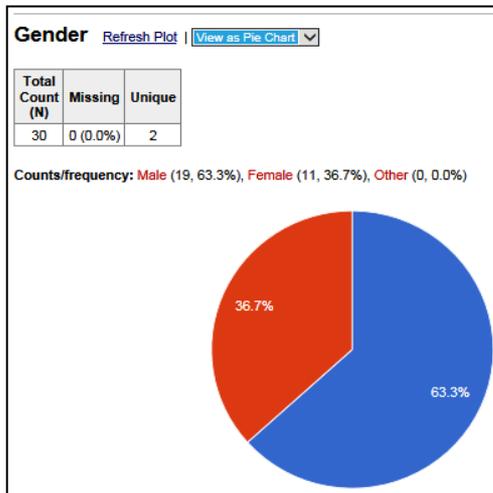
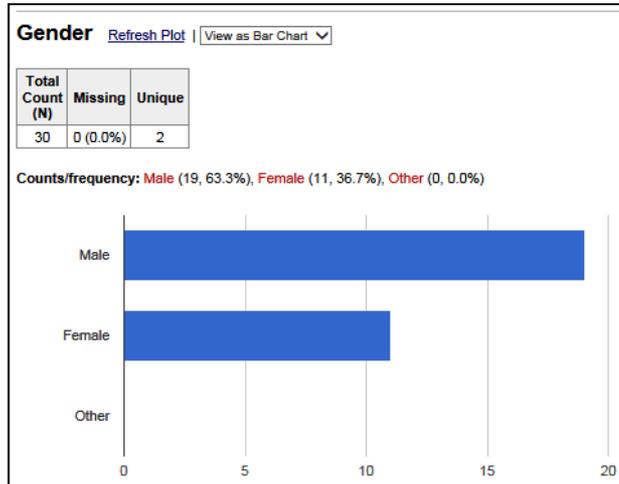
Date and datetime fields:

- 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**

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														
 	date_enrolled	Section Header: <i>Consent Information</i> Date subject signed consent <i>YYYY-MM-DD</i>	text (date_ymd)														
 	patient_document	Upload the patient's consent form	file														
 	first_name	Section Header: <i>Contact Information</i> First Name	text, Identifier														
 	last_name	Last Name	text, Identifier														
 	address	Street, City, State, ZIP	notes, Identifier														
 	telephone	Phone number <i>Include Area Code</i>	text (phone), Identifier														
 	email	E-mail	text (email), Identifier														
 	dob	Section Header: <i>Demographics</i> Date of birth	text (date_ymd), Identifier														
 	age	Age (years)	calc Calculation: <code>rounddown(datediff([dob], 'today', 'y'))</code>														
 	ethnicity	Ethnicity	radio <table border="1" data-bbox="1236 935 1458 1035"> <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																
 	race	Race	dropdown <table border="1" data-bbox="1236 1106 1574 1335"> <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

REDCap™

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Reports [Search](#) [Organize](#) [Edit](#)

1) Test Report

Help & Information

- Help & FAQ
- Video Tutorials
- Suggest a New Feature

Training Project

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.

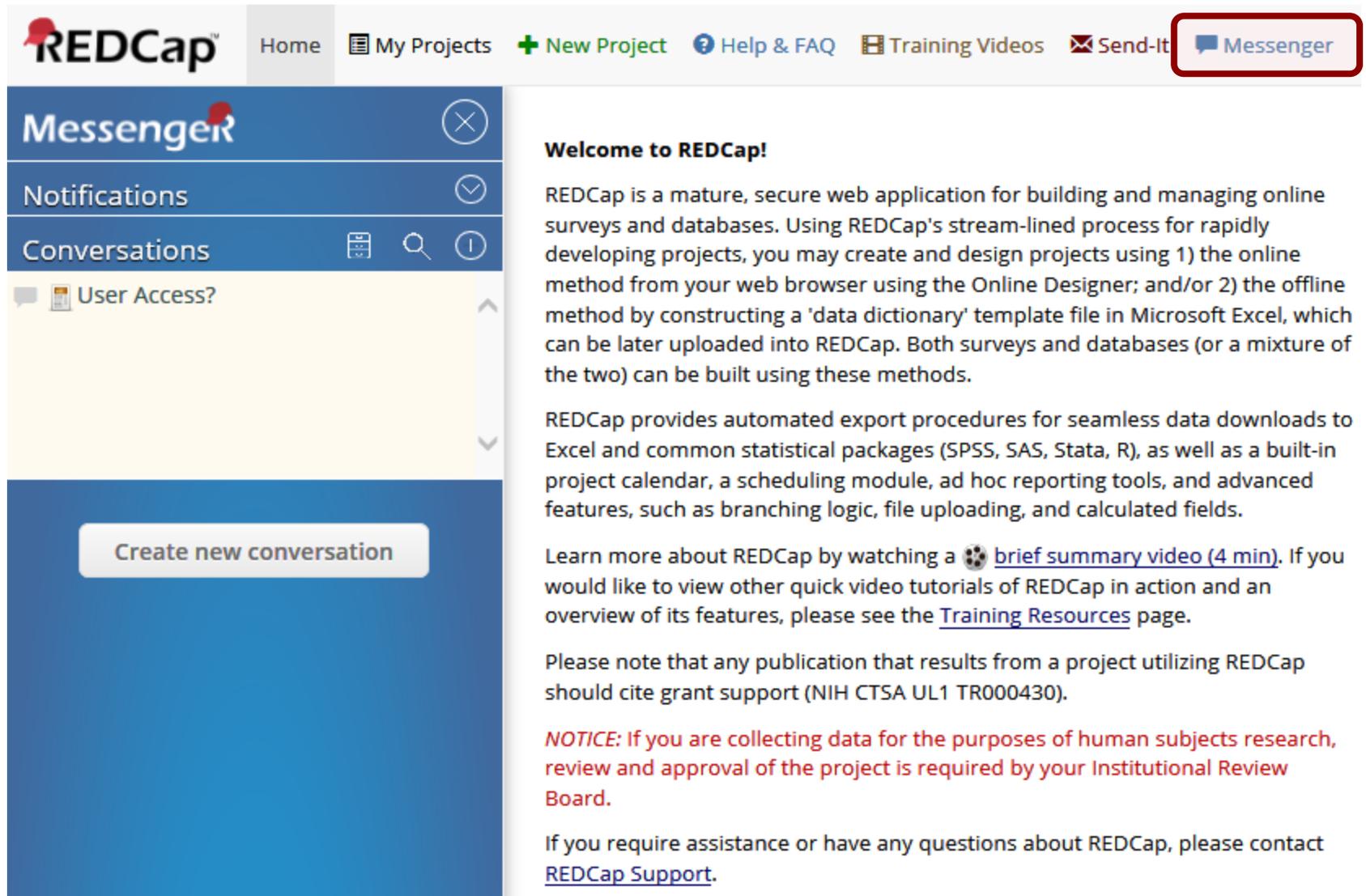
[User Files](#)

[Data Export Files](#)

[Upload New File](#)

Filter by file type: ALL <input type="text"/>		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



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

Messenger (X)

Notifications (✓)

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](#).

▶ SMART DEVICES



REDCap is compatible with:

- Tablets and smart phone (iOS and Android)
- imply go to <https://redcap.uchicago.edu/>

▶ MOBILE APP

Use for offline data collection

(where there is no/poor internet connectivity)



REDCap



App Store



Google play



Live Demo



Help Resources

▶ HELP RESOURCES

Inside of REDCap:



Outside of REDCap:

redcap@rt.cri.chicago.edu

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

ADDITIONAL HELP

<http://cri.uchicago.edu/redcap/>



[Request Resources](#) [Contact Us](#) [FAQ](#) [Technical Help](#) [CRI Careers](#)

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powered by the CRI

The CRI is proud to offer REDCap, a self-managed, secure, web-based solution designed to support data collection strategies for research studies.

QUICK LINKS

- [About REDCap](#)
- [Where to Start](#)
- [Accounts & Passwords](#)
- [Training](#)
- [Request Help](#)
- [Grant & Cite Language](#)
- [News Archive](#)

[LOG IN TO REDCAP](#)

NEWS

JUN
24

Announcing REDCap Office Hours

Want to discuss if REDCap is right for your study or project?

Want another set of eyes to look over your project design?

Need technical help with field or form problem?

▶ FUTURE SEMINARS

FEBRUARY 20th

- Making the Most of REDCap: Beyond Basic Skills

APRIL 14th

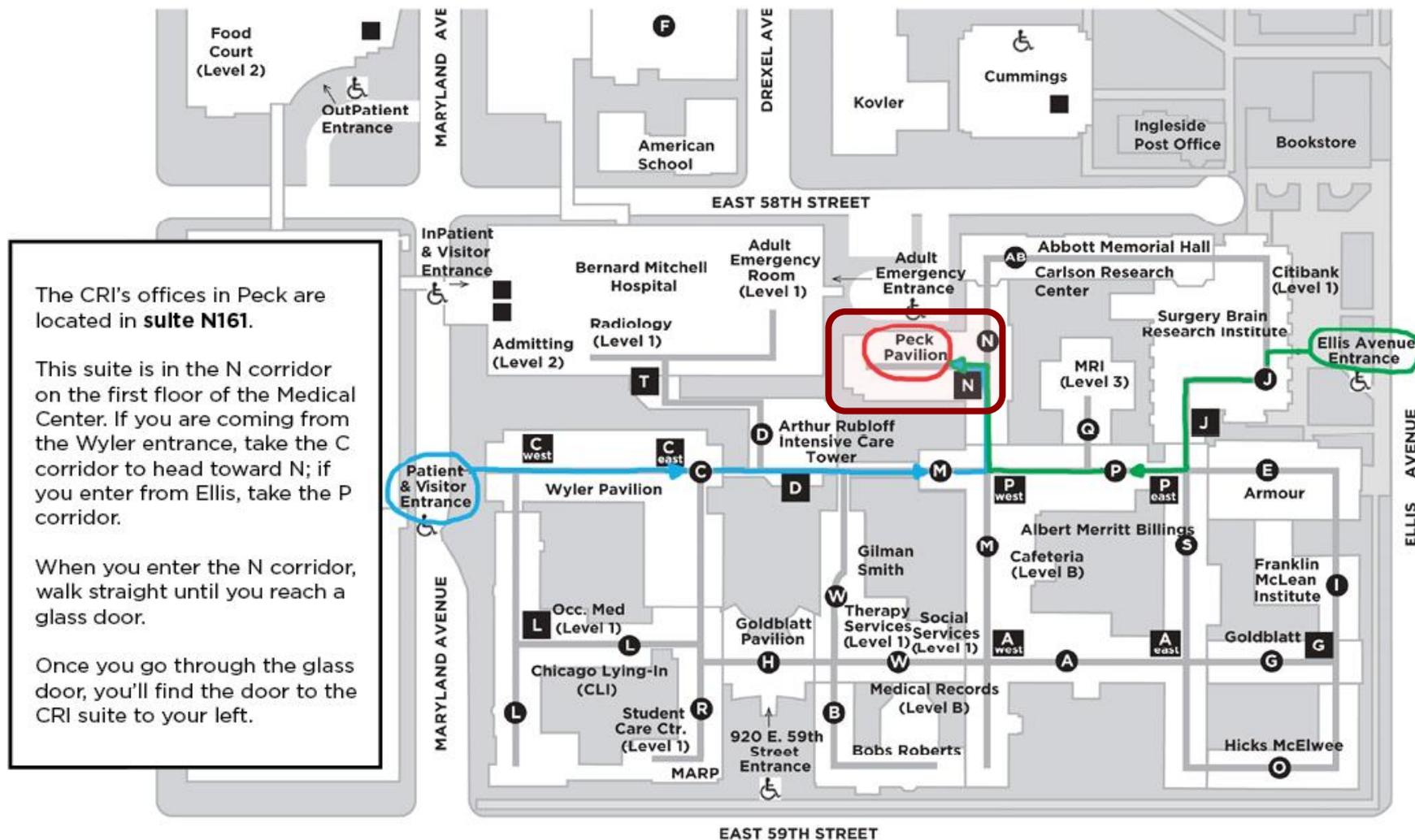
- Making the Most of REDCap: All About Surveys

REGISTER

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

OFFICE HOURS

Wednesdays, 12-3pm, N161, redcap@rt.cri.uchicago.edu



THANK YOU!



THE UNIVERSITY OF
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