



Government of **Western Australia**  
Child and Adolescent Health Service



Research Skills Workshop 2019 CAHS Research Education  
Program

# REDCap Basics

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# Getting started with REDCap

## Logging in

To access The Telethon Kids Institute instance of REDCap login at:

<https://redcap.telethonkids.org.au>

Users must be registered within the system in order to build and manage projects.

### **Users with Telethon Kids accounts:**

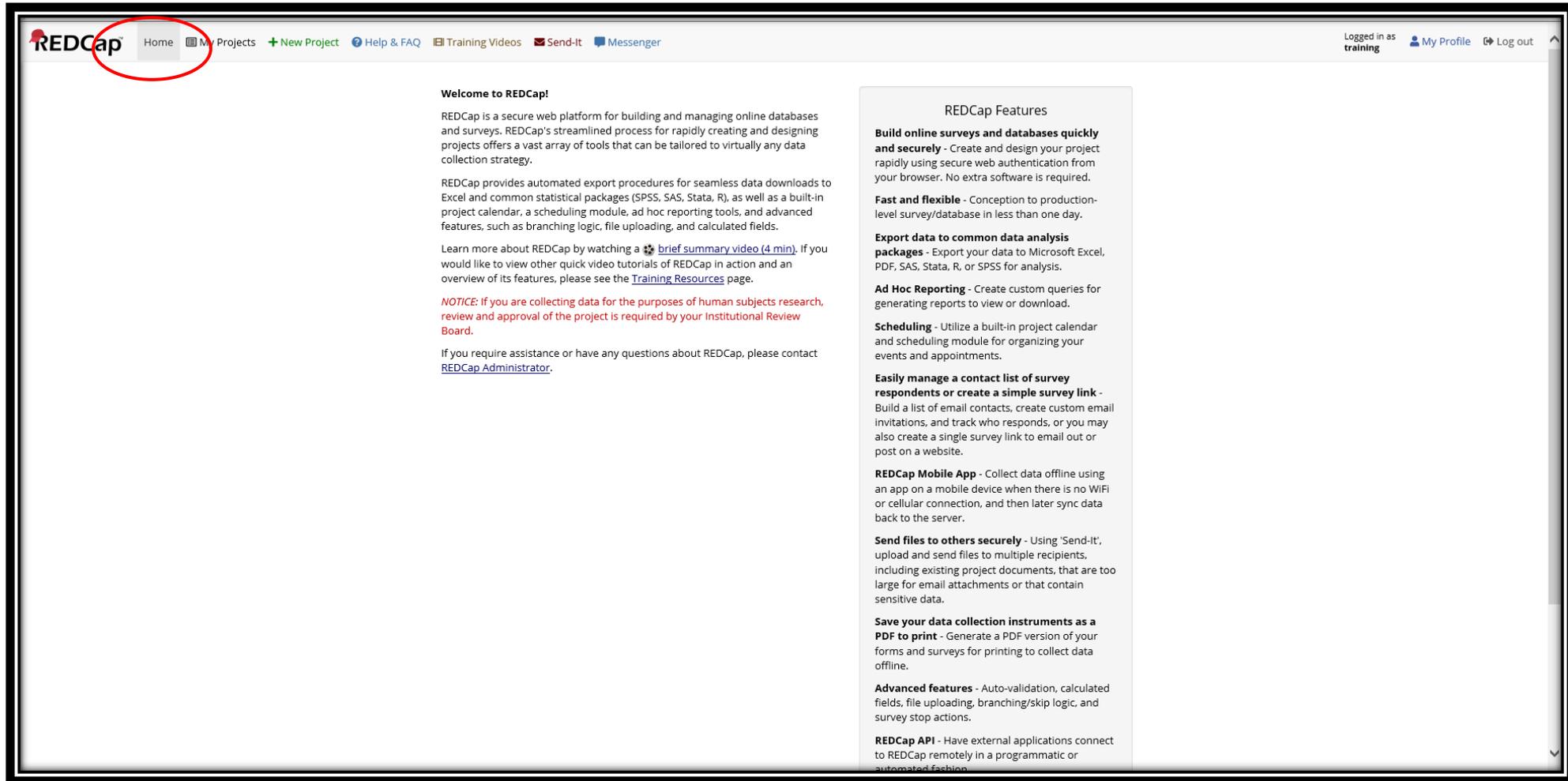
Everyone who has an institute email address will already have access (using the password from your email / workstation) to login to REDCap.

### **Users external to Telethon Kids:**

If you or your collaborator are external to Telethon Kids, contact [redcap@telethonkids.org.au](mailto:redcap@telethonkids.org.au) and provide the 1) name, 2) email address, and 3) 'reason for access' for the person requiring access to REDCap. The REDCap administrator will then create an account for that user.

# Navigating REDCap

## The REDCap Homepage



The screenshot shows the REDCap homepage. The navigation bar at the top includes the REDCap logo, a 'Home' link circled in red, and other links: 'My Projects', 'New Project', 'Help & FAQ', 'Training Videos', 'Send-It', and 'Messenger'. The user is logged in as 'training' and has a 'My Profile' link and a 'Log out' button.

**Welcome to REDCap!**

REDCap is a secure web platform for building and managing online databases and surveys. REDCap's streamlined process for rapidly creating and designing projects offers a vast array of tools that can be tailored to virtually any data collection strategy.

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.

**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 Administrator](#).

**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.
- REDCap Mobile App** - Collect data offline using an app on a mobile device when there is no WiFi or cellular connection, and then later sync data back to the server.
- Send files to others securely** - Using 'Send-It', upload and send files to multiple recipients, including existing project documents, that are too large for email attachments or that contain sensitive data.
- Save your data collection instruments as a PDF to print** - Generate a PDF version of your forms and surveys for printing to collect data offline.
- Advanced features** - Auto-validation, calculated fields, file uploading, branching/skip logic, and survey stop actions.
- REDCap API** - Have external applications connect to REDCap remotely in a programmatic or automated fashion.

## My Projects

The 'My Projects' page lists all the REDCap projects to that you currently have access.

Click the project title to open the project.

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

Logged in as training My Profile Log out

Listed below are the REDCap projects to which you currently have access. Click the project title to open the project. [Read more](#) To review which users still have access to your projects, visit the [User Access Dashboard](#).

**My Projects** [Organize](#)

Project Title	Records	Fields	Instrument	Type	Status
You do not have access to any projects					

REDCap 8.11.5 - © 2019 Vanderbilt University

## + New Project

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

Logged in as training 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. **Your project will not be created immediately**, but your request will be quickly reviewed by a REDCap administrator, after which you will be notified via email when the project has been created.

**Project title:**   
Title to be displayed on project webpage

**Purpose of this project:**   
How will it be used?

**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)

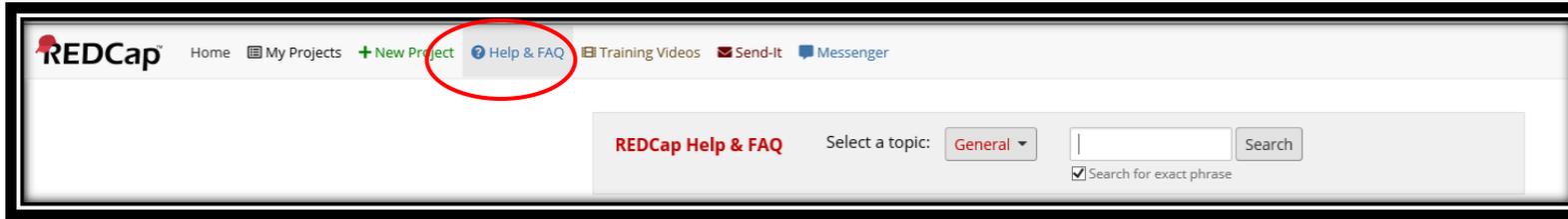
select template	Template title (sorted by title)	Template description
<input type="radio"/>	Basic Demography	Contains a single data collection instrument to capture basic demographic information.
<input type="radio"/>	Classic Database	Contains six data entry forms, including forms for demography and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

REDCap 8.11.5 - © 2019 Vanderbilt University

Once users are registered in the REDCap system they may create a new project by completing the form and submitting the request for approval.

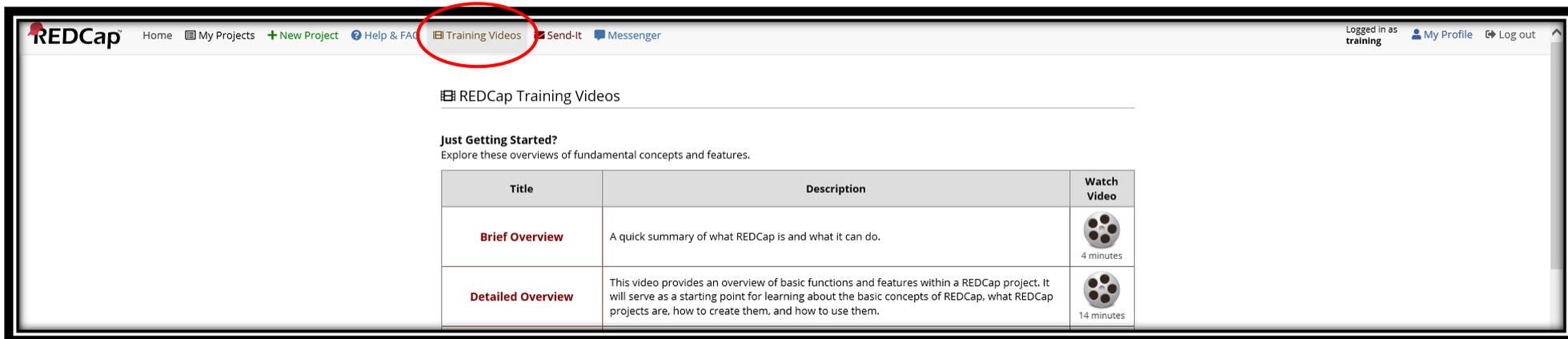
## Help & FAQ

The Help & FAQ page contains useful information on many topics related to creating and managing projects within REDCap.



## Training Videos

REDCap has a number of self-help videos that provide more detailed training on how to use the REDCap system to build and maintain projects.



# Creating a new REDCap Project

## New Project

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

Logged in as training 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. **Your project will not be created immediately**, but your request will be quickly reviewed by a REDCap administrator, after which you will be notified via email when the project has been created.

**Project title:**   
Title to be displayed on project webpage

**Purpose of this project:**   
*How will it be used?*

**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)

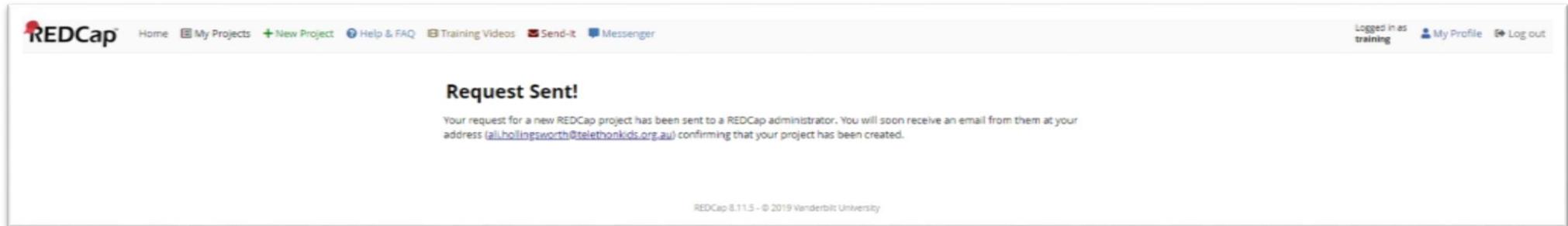
select template	Template title (sorted by title)	Template description
<input type="radio"/>	Basic Demography	Contains a single data collection instrument to capture basic demographic information.
<input type="radio"/>	Classic Database	Contains six data entry forms, including forms for demography and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

REDCap 8.11.5 - © 2019 Vanderbilt University

Click on the **+ New Project** tab to open up the form above. Complete the Project Title, Purpose, and select whether you wish to create an empty project, upload a REDCap project or use one of the template projects available from the template list shown.

Once 'Send Request' has been clicked, an automated email will be sent to the REDCap administrator who will review and approve the request for a new project (standard approval times apply). Following approval, you will be able to access your Project through the 'My Projects' page.

**NOTE:** Please give studies a sensible name that could be searched for in the future, preferably something that is likely to be unique. Avoid a title like "Parents Questionnaire", instead consider "Autism – ABC Trial – Parents QOL Questionnaire".



## Using an existing REDCap project to create a new project

REDCap enables you to be able to copy an existing project from within the same REDCap instance you are using and that you have permission to access.

### Creating a project from an existing data dictionary

1. Log into REDCap
2. Select your required project from the 'My Projects' tab that you want to copy and create a new project of
3. On the 'Other Functionality' tab, under 'Copy or Back up the Project' select the 'Copy Project' button

The screenshot shows the REDCap interface for project management. At the top, there are navigation tabs: 'Project Home', 'Project Setup', 'Other Functionality', 'Project Revision History', and 'Edit project se'. Below these is a section titled 'What is the REDCap API?' with a paragraph of text and a 'NOTE' about API tokens. The 'Current number of tokens: 0' is displayed in red. The main section is titled 'Copy or Back Up the Project'. It contains three buttons: 'Copy the project' (circled in red), 'Download metadata only (XML)', and 'Download metadata & data (XML)'. To the right of these buttons is a detailed explanation of each option. A 'NOTE' at the bottom states that the exported XML file does not contain the project's logging history.

4. On the 'Make a Copy of the Project' tab, check the following and update or select where required:

- Project Title: Change this title so you can distinguish between the project you are creating a copy from and the new project
- Purpose of this project: Change the dropdown list selection and any other information if this option or any of the details have changed
- Also copy the following: If you want to copy all the records, or keep any of the reports, setting, reports etc., select the required tickbox to copy the information to the new project
- Select the 'Request Copy' button

### Make a Copy of the Project

To make an exact duplicate of the current project ("Training Project"), set the details below for the new project you are creating, and click the button at the bottom. This will copy over all project forms and their fields, and optionally, you may also copy the current users and any reports that have been created.

**NOTE:**  
Since only REDCap administrators can copy a project, clicking the button below will send a request to a REDCap admin, who will make the copy for you. An email will be sent to your address (ali.hollingsworth@telethonkids.org.au) when this has been done.

**Project title:**   
Title to be displayed on project webpage

**Purpose of this project:**   
How will it be used?

**Project notes (optional):**   
Comments describing the project's use or purpose that are displayed on the My Projects page.

**Also copy the following:** (optional)

- All records/responses (0 records total)
- All users and user rights
- All users roles
- All reports
- All report folders
- All data quality rules
- All Project Folders
- All project bookmarks
- All custom record status dashboards

5. Once the changes have been approved by the REDCap administrator you will receive an email notification advising that your project has been successfully copied. You can then continue to setup your project and make any required change to the instruments via the online designer.

# Configuring your REDCap Project

Once your Project has been created, it will be available on the 'My Projects' page

My Projects

Project Title	Records	Fields	Instrument	Type	Status
<a href="#">Training Project</a>	0	2	1 form		

To navigate the various options within that project, click on the project title.

Training Project

Project status: Development

Completed steps 1 of 8

**Main project settings**

- Use surveys in this project? [?] [Disable]
- Use longitudinal data collection with defined events? [?] [Disable]

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

Add or edit fields on your data collection instruments (survey and forms). This may be done by 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 surveys in the Online Designer. 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 [US SmartSurveys](#) [eSurvey](#) [eSurveyApp](#)

**Define your events and designate instruments for them**

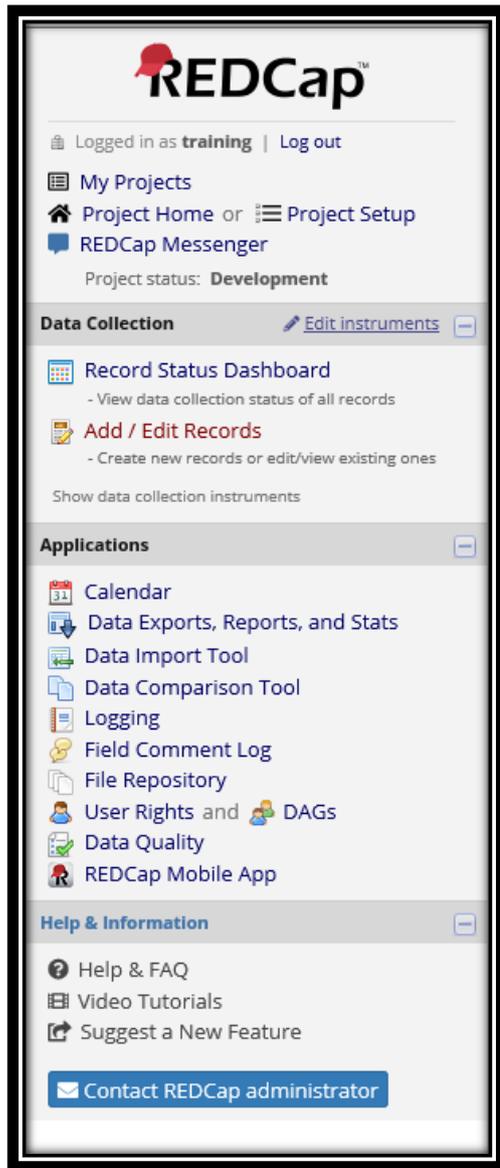
Create events for re-using data collection instruments and/or set up scheduling.

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

**Enable optional modules and customizations**

- Repeatable instruments [?] [Enable]
- Auto-numbering for records [?] [Disable]
- Scheduling module (longitudinal only) [?] [Enable]
- Randomization module [?] [Enable]
- Designate an email field for sending survey invitations [?] [Enable]
- Twilio SMS and Voice Call services for surveys [?] [Enable]

## Project Side Navigation bar



Access to most parts of REDCap including My Projects, Project Home, Project Setup, Data Collection and Applications as well as Help & Information

# Project Setup

**Training Project**

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

Project status: Development Completed steps 0 of 7

**Main project settings**

Not started

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

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

I'm done! Modify project title, purpose, etc.

**Design your data collection instruments**

Not started

Add or edit fields on your data collection instruments. This may be done by either using the Online Designer (online method) or by uploading a Data Dictionary (offline method). 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](#)

**Enable optional modules and customizations**

Optional

I'm done!

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 [?](#)

Enable Twilio SMS and Voice Call services for surveys [?](#)

Additional customizations

**Set up project bookmarks (optional)**

Optional

I'm done!

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

Go to [Add or edit bookmarks](#)

**User Rights and Permissions**

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...

Access to the Online designer, Data Dictionary, Main project settings, optional modules and customizations.

# Project Home

**Training Project**

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

**Quick Tasks**

- Codebook: The Codebook is a human-readable, read-only version of the project's Data Dictionary and serves as a quick reference for viewing field attributes.
- Export data: Export your data from REDCap to open or view in Excel or various stats packages.
- Create a report: Build custom reports for quick views of your data, and export reports to Excel/CSV.
- Check data quality: Build or execute data quality rules to find discrepancies and errors in your project data.
- User Rights: Grant new users access to this project or modify user privileges for current users.
- Online Designer and Data Dictionary Upload: Create new fields/questions on your data collection instruments or modify existing ones using the Online Designer or by uploading a Data Dictionary. Quick link: [Download the current Data Dictionary](#)
- Copy this project: Create an exact duplicate of this project, which copies over all data collection instruments, any surveys that exist, as well as the option to copy all users and reports to the new project.
- Data Access Groups: Create groups of users to limit user access to certain records/responses, in which only users within a given Data Access Group can access records created by users within that group.

**Project Dashboard**

The tables below provide general dashboard information, such as a list of all users with access to this project, general project statistics, and upcoming calendar events (if any).

**Current Users (1)**

User	Expires
training (all hollingsworth)	never

**Project Statistics**

Records in project	0
Most recent activity	08-04-2019 9:54am
Space usage for docs	0.00 MB

**Upcoming Calendar Events (next 7 days)**

Time	Date	Description
		No upcoming events

3.11.5/index.php?pid=354 [Citing REDCap](#)

An alternative way to access many of the settings available from Project Setup and side navigation bar

## Project Revision History

**Training Project**

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

The tables below list information about when major changes and revisions were made to the project. The first table below displays when the project was created, and if the project is in production, lists the time it was moved to production, as well as any revisions made to the project fields while in production. You may also download any of the Data Dictionaries from past revisions. The table at the bottom displays general statistics with regard to the times of project changes and revisions.

Project Revision History				Hide data dictionary snapshots
Created project	08-04-2019 9:54am	-	Created by <a href="#">ahollingsworth (Ali Hollingsworth)</a>	
Development status (current)	-	<a href="#">Download data dictionary</a>		

Project Revision Statistics	
Time since project creation	0.2 days

Each time a production change is made, a copy of the project's data dictionary will be saved automatically and available for download from the Project Revisions History tab.

## Other Functionality

### Training Project

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

#### What is the REDCap API?

The REDCap API is an interface that allows external applications to connect to REDCap remotely, and is used for programmatically retrieving or modifying data or settings within REDCap, such as performing automated data imports/exports from a specified REDCap project. For details on the capabilities of the REDCap API and how to use it, please see the [REDCap API documentation](#).

**NOTE:** If you wish to obtain an API token, which will allow you to make API requests, then someone must first grant you API user privileges on the User Rights page, after which you will then see a link called 'API' on the left-hand menu. That API page will provide instructions on how to request an API token.

#### Copy or Back Up the Project

[Copy the project](#) **Make an exact duplicate of this project.** All project fields will be copied over, and you will be prompted to set the title and info for the new project. You may choose to copy or not copy the existing data in the current project to the new one.

[Download metadata only \(XML\)](#) **Download a backup of this project.** The entire project (all records, instruments, fields, and project attributes) can be downloaded as a single XML file (CDISC ODM format). This XML file can be used to create a clone of the project (including its data, optionally) on this REDCap server or on another REDCap server (it can be uploaded on the Create New Project page). Because it is in CDISC ODM format, it can also be used to import the project into another ODM-compatible system.

[Download metadata & data \(XML\)](#)

NOTE: The exported XML file does \*not\* contain the project's logging history (audit trail), but if you wish to obtain it, you may freely download it any time at the top of the Logging page.

#### Project Management

[Delete the project](#) You may completely remove this project, in which all its data will be permanently deleted also. This can only be done while the project is still in development or you can send a request to delete the project while in production to a REDCap administrator.

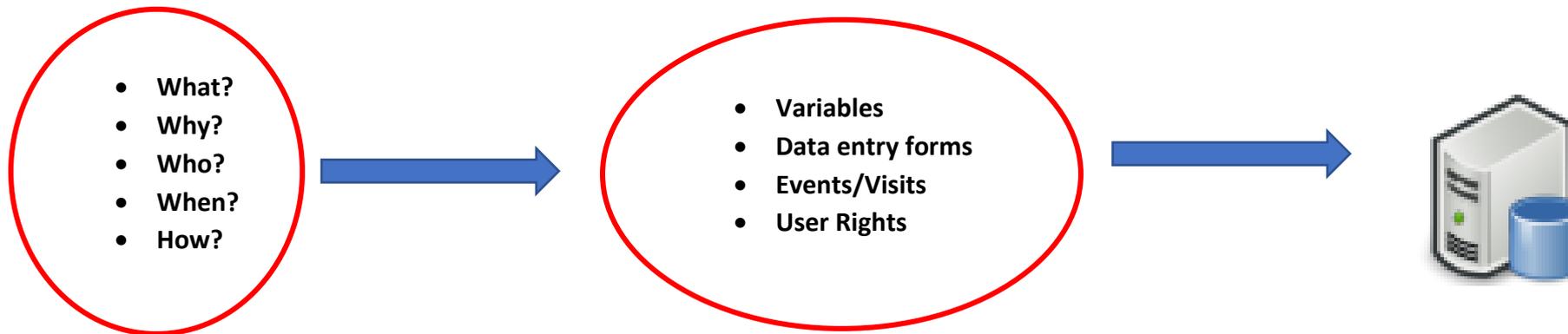
[Erase all data](#) You may erase all currently collected data in the project, which includes all calendar events, documents uploaded for records/responses, survey responses (if applicable), and any logging events pertaining to data collection. This can only be done while the project is still in development or you can send a request to delete the project while in production to a REDCap administrator.



Allows you to copy, delete or archive your project and download or erase data.

## Project Structure

Before beginning a REDCap project you should formulate a general study design, collate your data capture tools (specific forms), and think carefully about the structure of your study and the flow of participants through your study. Be cognisant of the end goal of the research throughout this process.



Configuration of the main project settings is completed in the Project setup page. The configuration of your project will vary according to the type of project you are creating.

There are three data collection types available in REDCap:

- |  |   |  |
|--|---|--|
| 1. Data collection performed only by study team                    | → | Data entry forms   |
| 2. Data collection performed only by subjects / study participants | → | Survey   |
| 3. Screening phase before enrolling subjects                       | → | Survey + Data entry forms (survey will be used to screen subjects and data entry forms to collect study data). |

There are two collection formats available for data entry forms:

**Classic:** one record per patient

**Longitudinal:** one record per patient per event (timepoint), with the possibility of defining multiple arms

If your project is using surveys and / or is collecting data longitudinally, these settings need to be enabled within the Main project settings section of the Project Setup page for your project, as shown below



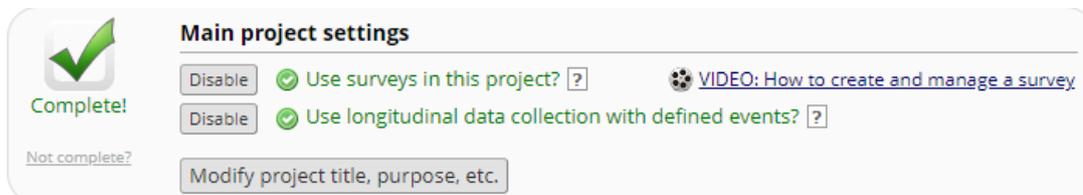
Click on 'Enable' next to 'Use longitudinal data collection with repeating forms' if your project will contain instruments that will be used to collect data numerous times. For an example, you are going to collect lab results over ten visits for the same participant.

Click on 'Enable' next to 'Use surveys in the project' to set up some or all of your data collection form(s) as surveys.

**NOTE:** Simply clicking on these options does not make your project longitudinal or make your data collection form(s) become surveys. Clicking these options only creates the template for your project to collect data in this way, and further steps are required to complete the enablement of these features.

It's not until you create an event table on the 'Define My Events' page and/or 'Enable' a specific form(s) as a survey(s) on the 'Online Designer'/'Edit Instruments' page that these features become functional. If you do not plan to use these features, it is recommended that you do not enable these features since it will create unnecessary data fields in your project and can cause problems upon data export.

Once you are finished with your main project settings, click "I'm done". This will serve as a visual check mark that this section is completed. Note: You can always go back and change your settings while in Development mode.

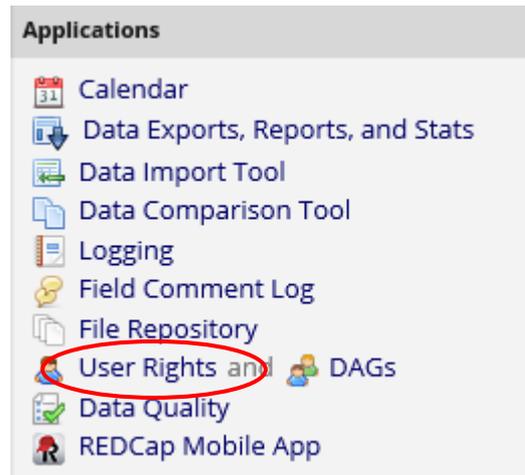


# Project Administration – User Rights

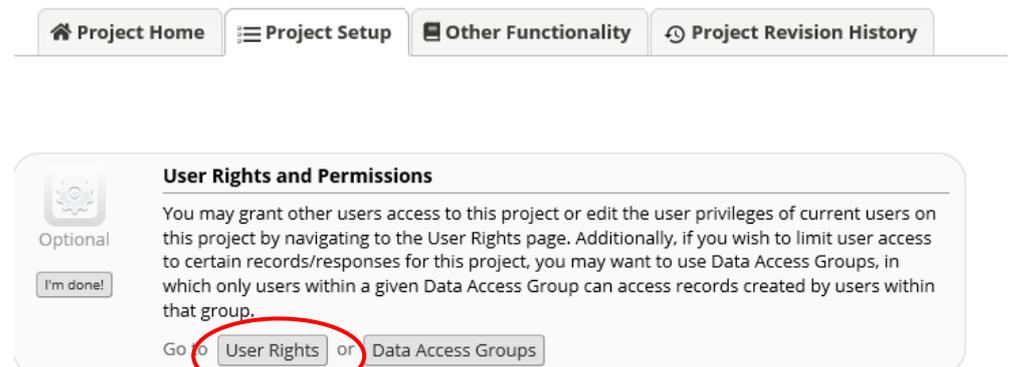
**User Rights:** The User Rights application is where the project creator defines the customized privileges that each project member has in terms of project design, data entry, and data access.

This can be accessed by A) From the Navbar menu > Applications> User Rights **OR** B) Project Setup page > User rights and permissions

A)



B)



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.

A Add new user Add with custom rights

B Assign new user Assign to role

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

C Enter new role name Create role

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)	Project Design and Setup	User Rights	Data Access Groups	Data Export Tool	Reports & Report Builder	Graphical Data View & Stats	Calendar	Data Import Tool	Data Comparison Tool	Logging	File Repository	Record Locking Customization	Lock/Unlock Records	Data Quality (create/edit rules)	Data Quality (execute rules)	API	REDCap Mobile App	Create Records	Remo Reco
—	training (all holdingsworth)	never	✓	✓	✓	Full Data Set	✓	✓	✓	✓	✓	✓	✓	✗	✗	✓	✓	✗	✗	✓	✗

This page may be used for granting users access to the project and for managing the privileges of those users. You may also create roles to which you may assign users; these are useful when you will have several users with the same privileges as they allow you to apply (and change if needed) the same privilege set to those users. Roles are also a natural way to categorize users within a project. In the box above 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.

#### Steps for adding a new user to the project

- 1) Ensure the new user has registered for a REDCap account <https://redcap.telethonkids.org.au/redcap> 2) After the new user has registered for a REDCap account, go to the project you would like to add them to. A list of your projects can be found under “My Projects.” 3) Once you are in your project, go to “User Rights” which is listed on the left hand side bar under Applications or under the Project settings page. 4) Once you have gone into “User Rights,” you will see a list of users that already have access to your project (if applicable) and which permissions they have (see above). 5) To add a new user, type their username into the “Add New user” field (A) and click ‘Add with custom rights’. 6) Once you have done this another screen will appear that lists all of the rights that are available (see below). Now you are ready to assign this user rights. The default settings for each new user are shown below.

You may set the rights for the user below by checking the boxes next to the application tools to which you wish to grant them access. You may also grant them or deny them access to individual data collection instruments, if so desired. To save your selections, click the "Add user" button at the bottom of the page.

 Adding new user "rkhadka"

**NOTICE:** This user is a REDCap administrator. Since administrators always have maximum privileges, modifying the user rights below will have no effect on this user in this project, including their usage of the REDCap Mobile App.

### Basic Rights

 Expiration Date  (D-M-Y)  
*(if applicable)*

#### Highest level privileges:

-  Project Design and Setup
-  User Rights
-  Data Access Groups

#### Privileges for data exports (including PDFs and API exports), reports, and stats:

-  Data Exports  No Access  
 De-Identified\*  
 Remove all tagged Identifier fields  
 Full Data Set

 Add/Edit/Organize Reports   
Also allows user to view ALL reports (but not necessarily all data in the reports)

 Stats & Charts

#### Other privileges:

-  Calendar
-  Data Import Tool
-  Data Comparison Tool
-  Logging
-  File Repository
-  Data Quality  Create & edit rules  
 Execute rules  
[What is Data Quality?](#)
-  API  API Export  
 API Import/Update  
[What is the REDCap API?](#)

### Data Entry Rights

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

	No Access	Read Only	View & Edit
My First Instrument	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

### New User Notification

Notify user of their project access via email?

Add user

Cancel

## Steps for creating a new role and assigning users to roles

- 1) In the 'Create new roles' field (C), give your new role a name for example 'Data Entry' and click 'Create Role'. Again the table above will display, allowing you to select the appropriate privileges for the role. Once you have selected the desired privileges, click 'Create role'. This role will then show in the user rights table (as below)

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)	Project Design and Setup	User Rights	Data Access Groups	Data Export Tool	Reports & Report Builder	Graphical Data View & Stats	Calendar	Data Import Tool	Data Comparison Tool	Logging	File Repository	Record Locking Customization	Lock/Unlock Records	Data Quality (create/edit rules)
—	training (ali hollingsworth)	never	✓	✓	✓	Full Data Set	✓	✓	✓	✓	✓	✓	✓	✗	✗	✓
<b>Data Entry</b>	[No users assigned]		✗	✗	✗	De-Identified	✓	✓	✓	✗	✗	✗	✓	✗	✗	✗

- 2) To add users to a role, enter the user name in the 'assign new user' field (B) and then select the role to which you wish to assign the user by selecting 'assign to role'. A list of all available roles will display for you to select from.

### Data Entry Rights

**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
My First Instrument	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Diet	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
School	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Exercise	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Rand 36 Item SF Health Survey Instrument (Version 1.0)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

The Data Entry Rights section allows you to control access to individual forms.

- The default setting is that all new users will have access to view and edit every form in the project but this can be changed by selecting either "No Access" or "Read Only" for each form.

No Access – User cannot view or edit the form at all.

Read Only – User can view the form but cannot change or add data to the form

### To Change an Existing User's Rights

- 1) Click on the user's name, select 'Edit user privileges' This will take you to the list of user rights that are available.
- 2) You can now check or uncheck the permissions you want to change for that user.
- 3) Click on "Save Changes" once you are finished. To delete a user so they no longer have access to the project, follow the previous steps and then click on "Remove User" (see right) and select "Remove user" when the dialogue box appears asking if you're sure you want to delete this user.

## Summary of Basic User Rights

**Project Design and Setup** – Allows user to change the set up and design of the project, such as creating events, making the project longitudinal, adding a survey, or renaming the project.

**User Rights** – Allows user to assign and change user rights for all those assigned to the project, including themselves.

**Data Access Groups** – For multi-site studies, only users within a given Data Access Group can access records created by users within that group.

**Data Export Tool** – Allows user to export data into Excel, SPSS, SAS, R and Stata. **No Access** – No data exporting can be performed. **De-identified** – Can only export data that is not classified as PHI in the project. **Full Data Set** – All data can be exported, including PHI, from the project.

**Add/Edit/Organise Reports** – Allows users to create and edit reports but not necessarily the data in the reports

**Stats & Charts** – Allows user to view all project data in aggregate graphical format and as descriptive statistics.

**Calendar** – Allows user to view calendar and schedule patients using the scheduling module and the Calendar Application.

**Data Import Tool** – Allows user to import data into project using the data import template (Excel).

**Data Comparison Tool** – Allows users to compare 2 records within a project

**Logging** – Allows user to view all project activity (which users have done what) under ‘Applications.’

**File Repository** – Allows user to view and open the files that are stored in the file repository under ‘Applications.’

**Data Quality** - Allows user to execute data quality rules upon project data to check for discrepancies in the data, such as missing values, field validation errors, and outliers.

**API** – An interface that allows external applications to connect to REDCap remotely, and is used for programmatically retrieving or modifying data or settings. Allows users to import/export data to and from external applications through the API.

**REDCap Mobile App** – Allows users to collect data offline in the mobile app and download data from the app if permitted.

**Create Records** – Allows user to create new records and add new subjects to project.

**Rename Records** – Allows user to rename records, such as assigning a subject a new Study ID number.

**Delete Records** – Allows users to delete subjects from the project. **Expiration Date** – Gives user access up until a specified date. Used mostly for temporary employees, such as students performing data entry.

**Record Locking Customization** – Allows user to have access to the Record Locking Customization Application, used for customizing the Record Locking option and E-signature option on data collection instruments.

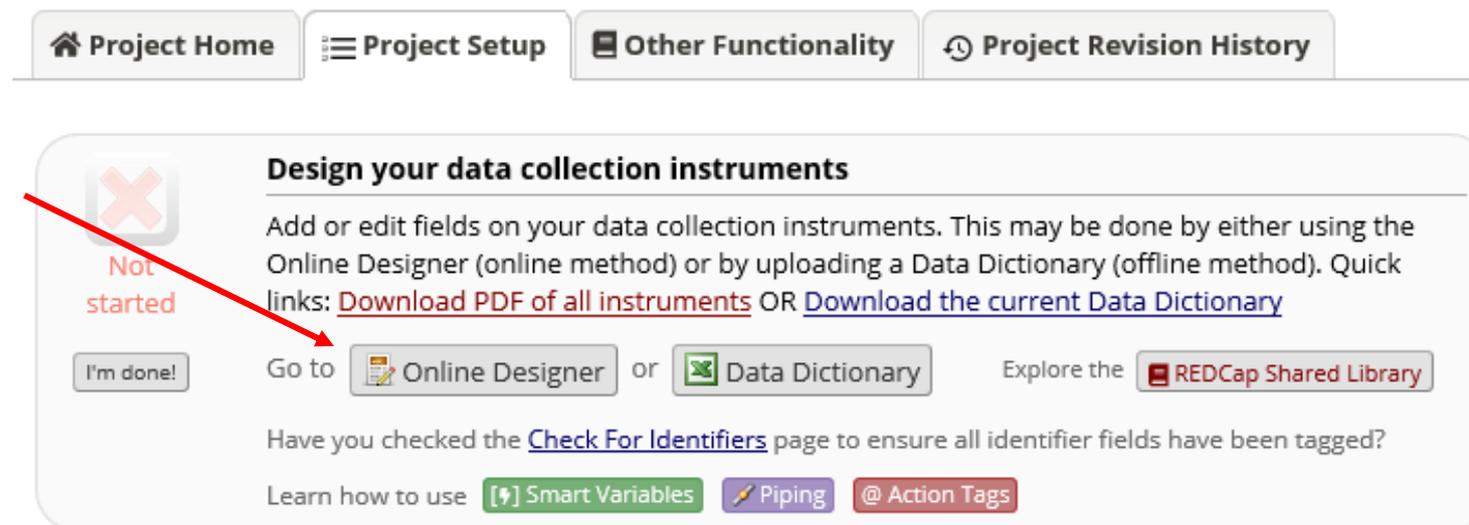
**Lock/Unlock Records** – Allows user to lock (and unlock) individual records so they cannot be altered. Disabled – User cannot lock or unlock records Locking/Unlocking – User can lock and unlock records Locking/Unlocking with E-Signature Authority\*\* - User can lock and unlock records a gives them e-signature privileges to apply an e-signature to forms.

**Allow locking of all forms at once for a given record** – Allows user to lock all records across the project for an individual subject.

# Creating and editing data collection forms using the On-line designer

Once your request to create a new project has been approved and you have set your main project settings (enabling surveys and longitudinal data collection) you are ready to design the data collections forms (Instruments).

On the Projects Setup page, click on Online designer



The screenshot shows the REDCap Project Setup page with four navigation tabs: Project Home, Project Setup, Other Functionality, and Project Revision History. The 'Project Setup' tab is active. Below the tabs is a section titled 'Design your data collection instruments' with a red 'X' icon and the text 'Not started'. A red arrow points from the 'Not started' text to the 'Online Designer' button. The text in the section reads: '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](#)'. Below this text are buttons for 'I'm done!', 'Go to Online Designer', 'Data Dictionary', and 'Explore the REDCap Shared Library'. At the bottom, there is a question 'Have you checked the [Check For Identifiers](#) page to ensure all identifier fields have been tagged?' and three buttons: 'Smart Variables', 'Piping', and 'Action Tags'.

**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](#)

## Online Designer

The Online Designer is the primary tool with which you will design your data forms. Assuming that you started with an empty project (started without using a template), REDCap will begin your project with a data collection instrument titled “My First Instrument”. To change the title, click the “Choose action” button. To add additional data collection instruments, click on the Create icon. Click on Add Instrument here and enter a name for the new instrument.

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.

The screenshot shows the 'Data Collection Instruments' section of the REDCap Online Designer. At the top, there are 'Survey options' (Survey Queue, Survey Login, Survey Notifications, Upload or download Auto Invitations) and 'Add new instrument' options (Create, Import, Upload). Below this is a table with columns: Instrument name, Fields, View PDF, Enabled as survey, Instrument actions, and Survey-related options. The table contains one row for 'My First Instrument' with 1 field, a PDF icon, an 'Enable' button, and a 'Choose action' dropdown menu. A red arrow points to the 'Survey Login' button, and another red arrow points to the 'Choose action' dropdown menu. A context menu is open over the 'Choose action' dropdown, showing options: Rename, Copy, Delete, and Download instrument ZIP.

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
My First Instrument	1		Enable	Choose action	

- Rename
- Copy
- Delete
- Download instrument ZIP

To begin building your data collection instrument, click on the instrument name.

The screenshot shows the 'Data Collection Instruments' section of the REDCap Online Designer. A tooltip is visible over the 'My First Instrument' name, indicating that clicking it allows for modification of the instrument. The tooltip text reads: 'Click to modify instrument Add new fields/questions to the instrument or modify existing ones.' The table below shows the 'My First Instrument' row with a blue diamond icon next to the name, indicating it is selected.

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
My First Instrument	1		Enable	Choose action	

### Record Identifier

The very first field in the first data collection instrument must be used as the record identifier and must be unique. The record identifiers can be automatically sequentially-generated or user-entered. The record identifier field cannot be deleted however you may rename this field by clicking on the pencil icon. It is strongly recommended to not use any Protected Health Information as the unique identifier to preserve confidentiality. This field does not need to be repeated for any other data instruments throughout the project; this is the only place you will need to be concerned with it.

## 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**

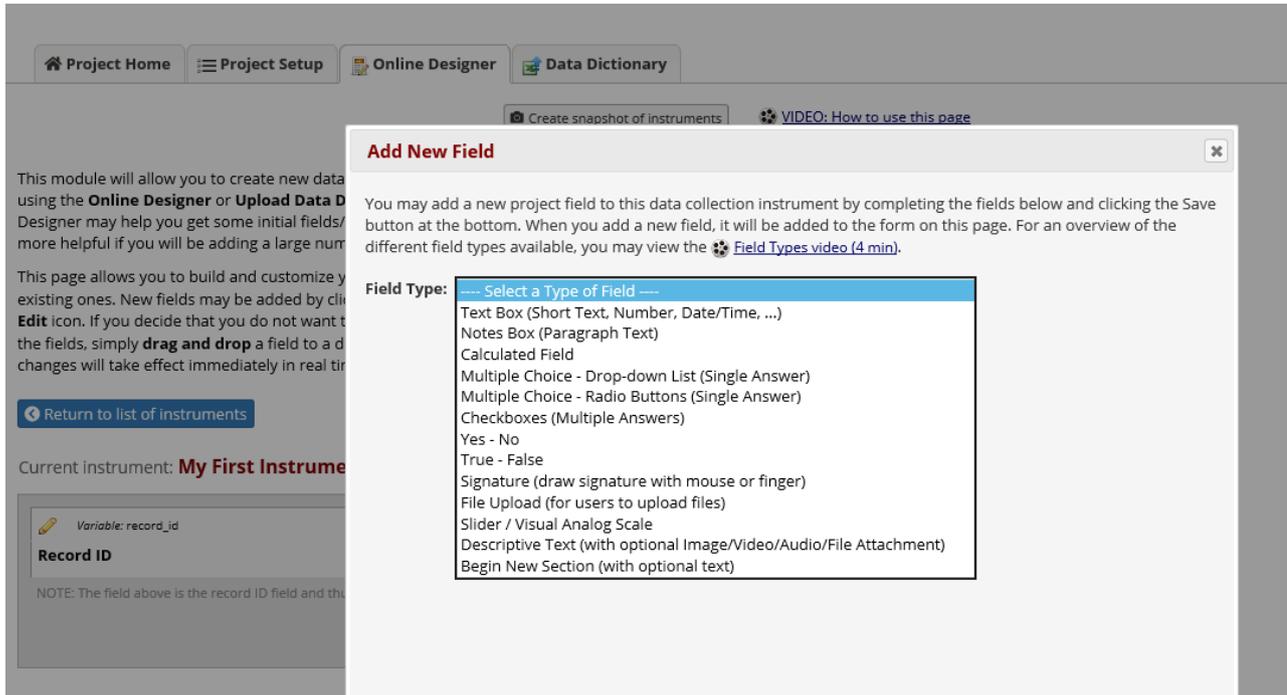
NOTE: The field above is the record ID field and thus cannot be deleted or moved. It can only be edited.

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

You may click the “Preview Instrument” button to preview what your form will look like during actual data entry. Calculated fields and branching logic will not work in this preview; practice data must be entered in records in order to test those particular functionalities.

## Add Fields to Your Data Collection Instruments

Click the **Add Field** button and select one of the several field types available.



The screenshot shows the 'Add New Field' dialog box in the Online Designer interface. The dialog box is titled 'Add New Field' and contains the following text:

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

Field Type:

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

The background interface shows the 'Project Setup' tab selected, with a navigation bar containing 'Project Home', 'Project Setup', 'Online Designer', and 'Data Dictionary'. Below the navigation bar, there are instructions for using the Online Designer and a 'Return to list of instruments' button. The current instrument is named 'My First Instrument' and has a field named 'Record ID' with the variable 'record\_id'.

## Add New Field



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

Field Type:

### Field Label

### 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)

- or -

Required?\*  No  Yes

\* Prompt if field is blank

Identifier?  No  Yes

Does the field contain identifying information (e.g., name, SSN, address)?

Custom Alignment

Align the position of the field on the page

Field Note (optional)

Small reminder text displayed underneath field

Save

Cancel

The example in this section will use the “Text Box” field type (essentially a “short answer” field), one of the most common field types in REDCap data entry. The general “new field” addition process is very similar across field types – however, other types may have additional features or nuances associated with them, which is discussed in detail in the Field types section.

If you are designing a **survey**, the Field Label will generally be a question, such as “How old are you (years)?” If you are designing a **research data entry form**, your Field Label may look more like a standard label, such as “Age (years)”.

The Variable Name is used by REDCap to store the data. We strongly advise against enabling auto-naming for variables (the checkbox to the right of the Variable Name field). You generally want to keep variable names short but somewhat descriptive, so that if you need to export your data, you will be able to recognize key variables. For instance, “Q1” is not a very descriptive variable name, and is not advised for most situations. “Height” is a good variable name, but “height\_in” or “height\_cm” is even better, because you are reiterating your measurement unit within the variable name, which is a good practice. If you have many forms, it can be helpful to add a prefix to your field variable names that indicates which form they are on. For instance, a variable representing age in years on your Demographics form might be labeled “dm\_age\_yrs

Validation is an extended option whereby, REDCap will prompt an error when a field’s entry does not meet certain expectations for data type, for example, if people enter text into what should be a numeric response. There is also the option for setting minimum and maximum expected values. (More information is provided under the validation section below)

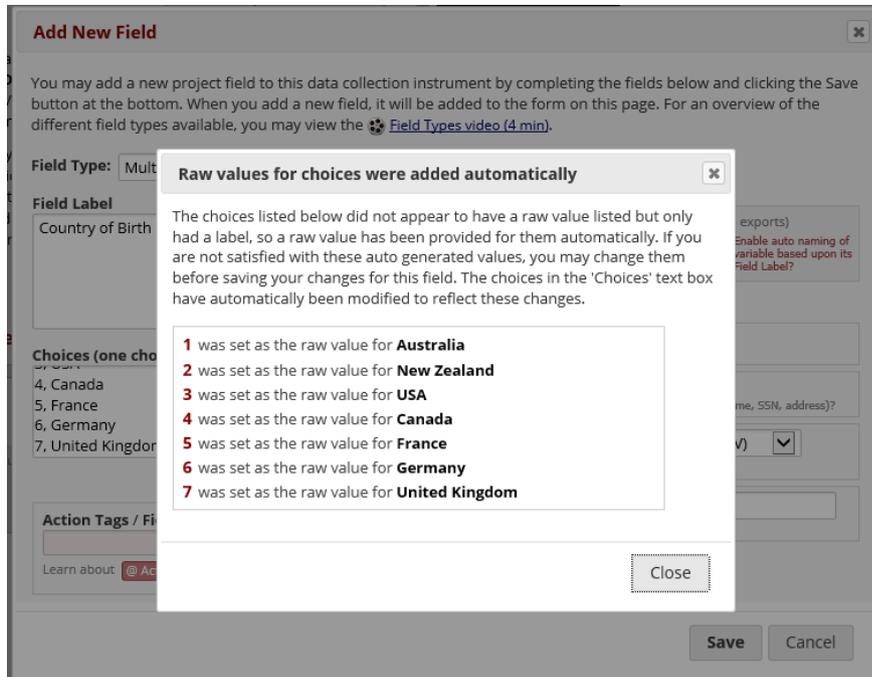
The Required option, by default, is set to “no”. If changed to “yes”, it will require an answer before a data form can be saved (or before a survey can be submitted, depending on your study setup).

The Identifier option should be marked whenever a field asks for one of the 18 HIPAA identifiers. When you export or view deidentified data, the fields that were marked as identifiers will be omitted.

The Custom Alignment option changes how the question (and answers, if the field is a multiple choice option) appears in the data entry screen. We don’t recommend adjusting this unless there is an aesthetic need to do so, but you may play around with the functionality as you explore REDCap’s features.

The Field Note option displays a side-note in small text beneath the text entry field (or multiple choice options) on the data entry screen. It is useful for designating units or clarifying a manner in which the question should be answered (e.g. “Mark all that apply”).

The Choices component of field creation is specifically for multiple choice field types (dropdown list, radio buttons, and checkboxes). It appears directly below the Field Label and serves as the place for you to list the various choices to select from, one choice per line. REDCap automatically “codes” these variables in increasing order beginning with “1.” This is for data storage purposes, and will not affect the way the choices are viewed in data entry. Below is the screen that will be prompted if you have not provided manual codes for your choices



Enabling the auto complete function makes searching easier (on the drop down list only), particularly where there are many options by transforming the drop down into a text search box on the options in the drop down instead of forcing the user to scroll through the entire list.

### Validation

When using the Text Box method of entry, it is best to ensure that the data coming in is the type of data that you are expecting to see. One method of doing this is by employing the Validation option in the field creation screen. By utilizing this feature, REDCap will prompt an error when a field's entry does not meet certain expectations for data type.

1.) Date: The three different formats you can specify for date are Day-Month-Year, Month-Day-Year, and Year-Month-Day. Regardless of which type you choose, a small calendar icon will be visible next to the field in data entry which you can utilize to easily specify a date in the appropriate format. You can also click the "Today" icon to automatically fill in the current date.

2.) Datetime: Datetime can be recorded with or without a “seconds” count. The three without seconds follow the same formats as the three Date formats (listed above), with an additional H:M to indicate time (Hours:Minutes). The three that do include seconds also follow the same three Date formats, with an additional H:M:S to indicate time (Hours:Minutes:Seconds). Like the Date option, a calendar icon appears next to the field, and in addition, a clock icon appears. You can also click the “Now” icon to automatically fill in the current date and time.

3.) E-mail: To validate an e-mail address entry, REDCap checks for a singular “@” symbol and an appropriate e-mail domain ending (such as “.com” or “.edu”). The inclusion of other special characters that would not be a part of valid e-mail addresses (such as “\$” or “#”) will also prompt a data validation error. This is very widely applicable, however, if you are expecting e-mail addresses connected to new or uncommon domains, we do not recommend using this validation option.

4.) Integer: Integers include all of the negative and positive whole numbers, plus zero. This means that any decimal or fractional values will prompt a validation error, as well as any values outside the designated minimum-maximum range.

5.) Number: This validation type accepts numbers, including decimal values. The four formats are derived from the number of decimal points you choose to allot: 1, 2, 3, or unspecified. If you choose to specify a number of decimal points, an error will be prompted if that exact number of decimal points is not met. For instance, if you have specified two decimal points, an entry of “3” or “3.0” would not be accepted – only “3.00” is considered a valid entry in this case.

8.) Phone: This validation type will only accept a ten-digit U.S. phone number (USA) or ten- digit Australian phone number (Australia)

9.) Postal code: This validation type will only accept a 4 digit number for postcode.

10.) Time: This validation type accepts only HH:MM time format. Like the Datetime type, the clock icon and/or the “Now” icon can be used to assist data entry.

11.) ZIP code: Only five- or nine-digit ZIP codes are accepted. Nine-digit ZIP codes must include a hyphen separating the first five from the final four, or an error will be prompted.

The following pages give an explanation of each field type.

### **Field types**

**Text Box (Short Text)** This field can be used for text, dates, numbers, email addresses, phone numbers etc. Use the Validation drop down to restrict how data should be entered.

**Notes Box:** A large text box for a large amount of text. This is convenient for long descriptions and “Additional Comments” boxes.

**Calculated Field:** A field which performs real-time calculations based on the entries in other fields. For an example, you could create a calculation based off the start time and end time of a test to see how much time elapsed. The syntax for complicated calculations can be intricate, but REDCap will alert you to any syntax errors, and will refuse to attempt calculations until they are resolved, preventing data errors.

**Multiple Choice – Drop Down List (Single Answer)** This field will display your answer choices as a drop-down list. Only one option can be selected. This can help save space on a data form if **there are many different choices to display.**

**Multiple Choice – Radio Buttons:** a set of radio buttons (round buttons), from which only one choice can be selected at a time. The “reset” button in the corner removes any current selection and returns the field to a null (absent) value.

**Checkboxes:** Checkboxes which allow the selection of multiple options if desired.

**Yes-No:** Radio buttons with the options “Yes” and “No.” These values are automatically coded: “Yes” = 1, “No” = 0.

**True-False:** Radio buttons with the options “True” and “False.” These values are automatically coded: “True” = 1, “False” = 0

**Signature:** This field will allow the participant to add their signature using their mouse or the finger (if using a tablet or touch screen device)

**File Upload:** This field gives the participant the ability to upload a file or image that may need to be attached to individual records

**Slider / Visual Analog Scale:** Visual analogue scale coded as values 0-100. You may provide labels above the left, middle, and right sides of the slider

**Descriptive Text:** Text displayed with optional image/file attachment. This field will allow you to add text such as instructions or additional information. It also gives you the option to add an image as a link or as an inline image.

**Begin New Section:** A field composed of a single line appearing in different colour from the rest of your form, indicating separation. This is largely for aesthetic/organization purposes. Adding text (to serve as a header) is optional. When deploying a survey, you have the option to break each section into separate pages, giving these headers a true separation functionality.

## Adding a matrix of fields

If you have a group of questions that all have the same answer choices, you can create a Matrix of Fields. Instead of clicking Add Field, click Add Matrix of Fields. Add an optional header, your Field Labels and Variable Names, indicate which fields are required, add your answer choices and select whether these fields should be a single answer (radio button) or multiple answers (checkboxes). If you would like only one answer choice to be selected per column, enable ranking. You must also give your matrix a group name.

### Add Matrix of Fields

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

**Matrix Header Text (optional)**

How often do you eat the following foods

Expand

**Matrix Rows**  Enable auto naming of variable based upon its Field Label?  
Each row represents a different field with its own label and variable name.

Field Label	Variable Name <small>ONLY letters, numbers, and underscores</small>	Required?*Field Annotation ?	
Ice cream	junk_icecream	<input checked="" type="checkbox"/>	<input type="text"/> ✖
Chips	junk_chips	<input checked="" type="checkbox"/>	<input type="text"/> ✖
Chocolate	junk_choc	<input checked="" type="checkbox"/>	<input type="text"/> ✖
pastries	junk_pastries	<input checked="" type="checkbox"/>	<input type="text"/> ✖

[Add another row](#)

**Matrix Column Choices** [Copy existing choices](#)

Choices (one choice per line)

- 1, every day
- 2, more then 5 times a week
- 3, 3-5 times a week
- 4, 1-2 times a week
- 5, less than once a week
- 6, rarely

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

**Other Matrix Info**

**Answer Format:**  
Single Answer (Radio Buttons) ▼

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

**Matrix group name:** ONLY letters, numbers, and underscores  
junk\_food [What is a matrix group name?](#)

[Save](#) [Cancel](#)

## **Edit/Copy/Move/Delete a Field**

**Edit-** To edit a field, click on the pencil icon 

**Copy-** To copy a field, click on the double paper icon 

**Move:** To move a field, click on the paper with pointer icon. You can also move a field by click and hold field and drag the field to a different location. 

**Delete:** To delete a field, click on the red X icon 

**Add Branching Logic** Branching logic is used when you have a field/question that you would only like to appear when a specific answer is given. To enable branching logic, click on the double green arrows on the field you want to hide. 

## Survey setup and distribution

Any data collection form in REDCap can be enabled as a survey, allowing participants to enter data for themselves, without having access to log into REDCap.

To utilise the survey distribution feature of REDCap, you must first enable the use of surveys in your “Main project settings” options on your “Project Setup” home page.



**Complete!**

Not complete?

### Main project settings

Disable  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.

Once this is complete, you will need to indicate which data collection instruments are going to be used as surveys.

In the online designer, enable the form as a survey, by clicking ‘Enable’ under ‘enabled as survey’

### Data Collection Instruments

**Survey options:**

- Survey Queue
- Survey Login
- Survey Notifications
- Upload or download Auto Invitations

**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	Enabled as survey	Instrument actions	Survey-related options
My First Instrument	2		Enable	Choose action	
Food Survey	0			Choose action	<input checked="" type="checkbox"/> Survey settings + Automated Invitations

Now that the form is enabled as a survey, click on 'Survey Settings' to design your survey.

This will take you to the Survey Settings page where you design your survey, such as choosing the font, text size and the survey's colour theme, and configure its settings, such as the question display format (all on one page or multiple pages), setting up an expiration date, enabling Text-to-Speech functionality, entering the survey completion text, and setting up confirmation emails for respondents.

[Project Home](#) [Project Setup](#) [Online Designer](#) [Modify survey settings](#)

You may edit the survey's basic information by modifying the fields below and clicking the Save Changes button.

Modify survey settings for data collection instrument "Food Survey" Save Changes Cancel

**Survey Status**  Survey Active  Survey Inactive  
If offline, respondents will not be able take the survey.

**Basic Survey Options:**

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

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

**Please complete the survey below.**  
Thank you!

**Survey Design Options:**

**Logo**  
(Optional: display an image above the survey title)  
Add new logo:  Browse...  
(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** Default  Customize

Type the text you want to appear on the first page of the survey. Normally this contains survey instructions or the wording for your informed consent if consenting subjects on-line

**Survey Customizations:**

**Question Numbering** Auto numbered

**Question Display Format** (One page or multiple pages?) All on one page

Display page numbers at top of survey page

Hide the 'Previous Page' button (i.e., Back button) on the survey page (prevents respondents from going back to previous pages)

**Allow participants to download a PDF of their responses at end of survey?** No

*Display a button for the participant to download a PDF file of their responses for the survey they just completed.*

**Survey-specific email invitation field** -- select a field --

*Designate an email field for sending survey invitations for this survey only*

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

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

**Allow survey respondents to view aggregate survey results after completing the survey?** Disabled

*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:**

10 Minimum number of responses required before participants are allowed to view aggregate data (recommended = 10).

Do not show plots for questions lacking diversity in response values? (What does this mean?)

**Text-To-Speech functionality** Disabled

*(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.

The survey can be one page or multiple pages. To break the survey into sections for multiple pages, use the Begin New Section (with optional text) field type. Each section will be its own page of the survey.

**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.) ?

D-M-Y H:M

The time must be for the time zone **Australia/Perth**, in which the current time is 17-04-2019 13:50.

**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 ?

Allow 'Save & Return Later' option for respondents? If your survey is long or you want to allow respondents to save the survey and return to it later, you can enable that here.

**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!

**B I U ABC** [How to use Piping here](#)

---

**e-Consent Framework**  
- and -

**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  
 Auto-Archiver enabled  
 Auto-Archiver + e-Consent Framework [What is the e-Consent Framework?](#)  
 (includes end-of-survey certification & archival of PDF consent form)

---

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

No

Survey Completion text: This is the text that will appear when the respondent submits the survey. It is not emailed to them, it merely appears on the screen when they click Submit.

Sending an e.mail confirmation will work by using the email address on the participant list. If a confirmation is required for a public survey, the participants email address needs to be collected within the survey.

### Delete Survey Settings

**Delete Survey Settings:** Please note that deleting the survey settings will NOT delete any responses collected using the survey. Also, deleting the survey settings will NOT delete the data collection instrument, but instead the instrument will revert back to how it was before it was enabled as a survey, in which data can only be collected by authenticated users on the data entry form.

### Survey distribution

Once the survey settings are completed and saved, the survey needs to be distributed. There are two methods of distributing the survey: via the *Public Survey Link* and via the *Participant List*.

Public Survey Link: Using the Public Survey Link is the simplest and fastest way to collect responses for your survey. 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 but may also be problematic; REDCap does not keep track of which respondents have taken the survey and which have not since the respondent's emails are not captured within the system.

The Public Survey Link *can* be used for longitudinal data collection as long as the 'Designated an email field to use for invitations to survey participants' has been enabled on the Project Setup page under 'Enable optional modules and customizations,' and the initial survey collects the respondent's email address.

Participant List: The Participant List option allows you to send a customized email to anyone in your list and track who responds to your survey as participants are sent individualised links. It is then possible to identify an individual's survey answers by including an 'identifier' for each participant (this feature must first be enabled on the Participant List page).

## Public Survey Link (non-longitudinal data collection)

Click on 'Survey distribution tools' under Data Collection (left-hand menu) on the Project Setup page. This will take you directly to the Public Survey Link page.

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.

**Public Survey URL:**

**Link Actions**

- Open public survey
- Open public survey + Log out
- Send me URL via email
- Survey Access Code or QR Code

**Link Customizations**

- Get Short Survey Link
- Create Custom Survey Link
- Get Embed Code

To view what the survey will look like to respondents, click on 'Open public survey.' The 'Public Survey URL' is the link that you would provide to all the desired respondents. This can be emailed to the participants, posted on a website or recruitment letter, saved to a desktop/device, or opened while the respondent is present.

## Participant List (non-longitudinal data collection)

Click on 'Survey distribution tools' under Data Collection (left-hand menu) on the Project Setup page. Click on 'Participant list'.

Participant Identifier: If you need to be able to identify which survey response belongs to which respondent, click on 'Enable' next to Participant Identifier. Note: Once you send out the surveys you cannot enable this option for the invites that have already been sent out so the responses will be anonymous. To add people to the Participant List, click on 'Add participants.'

Public Survey Link

Participant List

Survey Invitation Log

The Participant List option allows you to **send a customized email** to anyone in your list and **track who responds to your survey**. It is also possible to identify an individual's survey answers, if desired, by providing an Identifier for each participant (this feature must first be enabled by clicking the 'Enable' button in the table below). Note: All survey responses collected are considered anonymous unless you 1) are using Participant Identifiers or 2) have enabled the designated email field for invitations. [More details](#)

**Participant List** belonging to [Initial survey] "My First Instrument" Remove all participants

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

Email	Record	Participant Identifier	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
No participants have been added							

If not using the 'Participant Identifier,' add the email addresses of the respondents, one per line (Example# 1). If using the 'Participant Identifier,' add the email addresses of the respondents, one per line, as well as the participant's identifier (Example # 3). Click on 'Add participants' when all emails have been entered.

### Add Emails to Participant List ✕

Copy and paste your list of participant email addresses, **one per line**. If you are importing Identifiers for any participant, separate them by commas following the guidelines below.

abc@hotmail.com, ef123d

**Each participant starting on a new line**

**Field Order:** Email, Participant Identifier (optional)

---

**Example #1:** john.williams@hotmail.com  
**Example #2:** jimtaylor@yahoo.com, Jim Taylor  
**Example #3:** putnamtr@gmail.com, ID 4930-72

Add participants Cancel

To send the survey to those on the Participant List, click on 'Compose Survey Invitations.'

The screenshot shows the 'Participant List' interface for a survey titled 'My First Instrument'. At the top, there are buttons for 'Add participant' and 'Compose Survey Invitations', with the latter circled in red. Below the buttons is a table with columns: Email, Record, Participant Identifier (optional), Responded?, Invitation Scheduled?, Invitation Sent?, Link, and Survey Access Code and QR Code. The first row contains the email 'abc@hotmail.com' and the identifier 'ef123d', both of which are also circled in red.

Email	Record	Participant Identifier (optional)	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
abc@hotmail.com		ef123d		-			

The Compose Survey Invitations page is where you set up when the survey should be sent (immediately vs. a specific date and time), reminder emails if the participant has not responded by a specified time and the email that will go out with the survey invitation.

Note: Reminder emails must be set up before the survey is sent out and cannot be set up retroactively. If you forget to set up reminders, you'll have to re-send the survey to the participant if they do not respond.

**Send a Survey Invitation to Participants**

**Info**  
**Survey title:** My First Instrument

**When should the emails be sent?**  
 Immediately  
 At specified time:  8:11 D-M-Y H:M  
The time must be for the time zone Australia/Perth, in which the current time is 17-04-2019 15:28.

**Enable reminders**  
 Re-send invitation as a reminder if participant has not responded by a specified time?

**Compose message**  
**From:** ali.hollingsworth@telethonkids.org.au  
(select any project user to be the "Sender")  
**To:** [All participants selected from Participant List]  
**Subject:**

**Compose** | Preview | Send test email

Please take this survey.

You may open the survey in your web browser by clicking the link below:  
 [survey-link]

If the link above does not work, try copying the link below into your web browser:

**NOTE:** You may modify or remove any text you wish in the Compose Message text box above. Make sure you include either [survey-link] or [survey-url] in the text or else the participant will not have a way to take the survey.

You may use HTML formatting in the email message: <b> bold, <u> underline, <i> italics, <a href="..."> link, etc. [How to use Piping in the survey invitation](#)

**Participant List** (those who have not responded completely) Actions: -- check/uncheck participants --

<input checked="" type="checkbox"/>	Email (1 selected)	Participant Identifier	Scheduled?	Sent?	Respond
<input checked="" type="checkbox"/>	abc@hotmail.com	ef123d	-		

**Send Invitations** | Cancel

email addresses with a tick under the 'Participant List' heading are the email addresses that will be sent the invitation to the survey. You can uncheck an email address if you do not want an invitation to be sent to this address

The

Click on 'Send Invitations' when finished. The survey invites have now been sent! You can go back to the Participant List page to see who has responded to the survey, if an invitation has already been sent and the unique survey link for that participant. The grey bubble under 'Responded' will turn green when the survey has been submitted. If there is an envelope icon with a green arrow under 'Invitation Sent' then the invitation has already been sent to the individual. To view the unique survey link for the individual, click on the icon under the 'Link' column. To remove an individual from the Participant List, click on 'remove' in the far-right column.

## Public Survey Link (longitudinal data collection)

You can use the Public Survey Link for collecting longitudinal data, and have all the surveys linked to the individual, but only if you are collecting the email addresses of the respondents in the initial survey and enable the 'Designate an email field' under Optional Modules and Customizations. The project must also be set up longitudinally, with at least 2 events.

On the Project Setup page > Enable optional modules and customizations > Enable: 'Designate an email field to use for invitations to survey participants.' Designate the email address field you are collecting on the first instance of the survey.

The image shows two screenshots from a software interface. The top screenshot is a dialog box titled "Designate an email field for sending survey invitations". It contains a dropdown menu with the following options: "-- select a field --", "My First Instrument", and "email 'email address'". The "email 'email address'" option is highlighted with a red circle. Below the dropdown is explanatory text and a "Save" button. The bottom screenshot shows the "Enable optional modules and customizations" section. It lists several modules with "Enable" buttons. The "Designate an email field for sending survey invitations" module is highlighted with a red circle.

**Designate an email field for sending survey invitations**

Choose an email field to use for invitations to survey participants:

-- select a field --  
My First Instrument  
email "email address"

Using the designated email address field can be especially valuable when your first data collection instrument is not enabled as a survey while one or more other instruments have been enabled as surveys. Since email addresses can only be entered into the Participant List directly for the first data collection instrument, the designated email field provides another opportunity to capture the email address of survey participants.

Please be aware that designating an email field means that survey responses can NEVER BE ANONYMOUS because of the fact that the participant's email address can be viewed on a data entry form, which means it is easy to identify the record/response to which the email address belongs.

**NOTE:** If the participant's email address has already been captured directly in the Participant List, then that email address will supersede the value of the email field here when survey invitations are sent to the participant. Also, if the email invitation field exists on multiple longitudinal events, on a repeating instrument, or on a repeating event, the field's value will be synchronized across all instances/events so that changing it in one location will change the value across all events/instances where the field appears.

**Survey-specific email invitation field:** While the email invitation field discussed here is a project-level setting, it is helpful to know that there also exists a survey-level email invitation field option that can be utilized for particular surveys in the project (whereas the project-level field would be applied to ALL surveys). A survey-specific email invitation field can be enabled for any given survey, in which you can designate any email field in your project to use for sending survey invitations for that particular survey. Thus, you can collect several email addresses (e.g., for a student, a parent, and a teacher) and utilize each email for a different survey in the project. Then you can send each person an invitation to their own survey, after which all the survey responses get stored as one single record in the project. See the 'Survey Settings' page in the Online Designer for this survey-level setting.

Save Cancel

**Enable optional modules and customizations**

Optional

I'm done!

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 ?

Enable Twilio SMS and Voice Call services for surveys ?

### **Participant List (longitudinal data collection)**

You can use the Participant List for collecting longitudinal data, and have all the surveys linked to the individual, by entering the email addresses of the respondents into the Participant List and by enabling the 'Designate an email field' under Optional Modules and Customizations. The project must also be set up longitudinally, with at least 2 events

On the Project Setup page > Enable optional modules and customizations > Enable: 'Designate an email field to use for invitations to survey participants.' Designate the email address field you are collecting on the first instance of the survey.

# Entering Data

Within REDCap every record is identified by a unique key: Study ID (aka Record ID or Subject ID). This key identifier is the first question on the first form (or survey). It is used by REDCap as the key variable to link all forms/events for a particular subject.

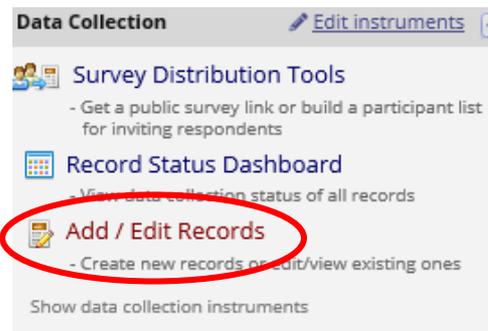
If multiple sites are involved in a study (and the Data Access Group feature is not being used), it is recommended to use conventions in order to group subjects by site. For example: 1 digit for the site and 3 digits for the subject number: Site 1, subject 1: Study ID = 1001 Site 2, subject 1: Study ID = 2001

There are multiple ways that data can be entered in to REDCap:

1. Data Entry within the web browser
2. Via a downloadable .pdf of instrument
3. Double Data Entry
4. Using the data import tool
5. Mobile data entry via the REDCap App

## 1. Data Entry within the web browser

Under the Data Collection menu on the side bar navigation menu, click Add/Edit Records



Once you are in the main “Add/Edit Records” page, you may create a new record by typing in a new Record ID (this will be automatically assigned if  **Auto-numbering for records**  is enabled on the Project setup page), choose an existing record to edit, or search for a particular record by a field

value (for instance, using the search field “Name” and typing “Jon Smith” into the search query). If you are employing multiple Arms in your study, the first two options sort the records into groups by Arm. To search for a record whose Arm you are not certain of, using the Data Search option is best.

### Add / Edit Records

You may view an existing record/response by selecting it from the drop-down lists below. To create a new record/res; button below.

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

Total records: 0

Choose an existing Record ID

-- select record --

Add new record

Total records: 2

Choose an existing Record ID

-- select record --  
1  
2

### Data Search

Choose a field to search

(excludes multiple choice fields)

All fields



Search query

Begin typing to search the project data, then click an item in the list to navigate to that record.

After you have added a new record, the Record Home page will display, showing the progress of data entry for the selected record. To begin entering data, click on the grey radio button of the form that you wish to enter data into to be taken to that form.

Records are entered one form at a time. Filling out a form will lead you to the next available form to be completed.

The menu to the left of the data entry form contains a list of all the forms to be filled out for that subject at the selected event.

**Record Home Page**

**Record "3" is a new Record ID.** To create the record and begin entering data for it, click any gray status icon below.

The grid below displays the form-by-form progress of data entered for the currently selected record. You may click on the colored status icons to access that form/event.

**Legend for status icons:**

- Incomplete    ?
- Unverified    ✔ Partial Survey Response
- Complete    ✔ Completed Survey Response

**NEW Record ID 3**

Data Collection Instrument	Status
My First Instrument (survey)	<input checked="" type="radio"/>
Food Survey (survey)	<input type="radio"/>

**Data Collection** [Edit instruments](#)

**Survey Distribution Tools**  
- Get a public survey link or build a participant list for inviting respondents

**Record Status Dashboard**  
- View data collection status of all records

**Add / Edit Records**  
- Create new records or edit/view existing ones

---

**Record ID 5** [Select other record](#)

Data Collection Instruments:

- **My First Instrument**
- ? Food Survey

These are the forms that need to be filled out. You can skip ahead to any form by clicking on the radio button next to its name

## My First Instrument

Adding new Record ID 3

Record ID 3

time

email address

Form Status

Complete? Incomplete

Save & Exit Form Save & ...

-- Cancel --

At the bottom of your data entry form, you have the option to mark the form as Incomplete, Unverified, or Complete. Incomplete forms will display a red icon where data entry has begun, Grey where no data has been saved for a form and which is the default status for all forms in a new record; the yellow icon indicates Unverified, and green indicates Complete.

Clicking **“Save and Stay”** will save your progress and keep you on the current page. Clicking **“Save and go to Next Form”** will save all data and take you immediately to the next form for that record, **“Save and go to Next Record”** will save all data and take you immediately to the next record. Clicking **“Save and Exit Record”** will save all data and return you to the “Add/Edit Records” main page. You may also lock forms for a record to prevent other users from editing existing information.

Form Status

Complete? Incomplete

Save & Exit Form Save & ...

-- Cancel --

- Save & Stay
- Save & Go To Next Form
- Save & Exit Record
- Save & Go To Next Record

In your data entry screens (not including the survey submission screen), there is a small “H” and speech bubble appearing beside each field. The “H” tracks the history of all recorded data values for that particular variable. The speech bubble is the Field Comment Log, which allows users to make comments on particular fields, and lights up yellow when a comment exists for a field.

The screenshot shows a data entry form with a record ID of 3. A red circle highlights a field with the value 52. A 'Data History' popup is open, displaying the following table:

Date/Time of Change	User	Data Changes Made
04-02-2019 10:27am	ahollingsworth	35
01-05-2019 2:25pm	ahollingsworth	52

The popup also includes a 'Close' button at the bottom right.

The screenshot shows a data entry form with a record ID of 3. A red circle highlights a field with a yellow background. A 'Field Comment Log' popup is open, displaying the following table:

Date/Time	User	Comments
01-05-2019 2:27pm	ahollingsworth	Data entered incorrectly and amended to correct value
01-05-2019 2:27pm	ahollingsworth	

The popup also includes a 'Close' button at the top right and explanatory text about field comments.

## Record Status Dashboard

The second way to view/edit existing records is to go to the “Record Status Dashboard.” If your project contains a lot of records, the Record Status Dashboard makes it easier to find the record you’re looking for. It also displays all the form statuses, making it easier to see which subjects have Incomplete or Unverified data collection forms.

This is a table listing all existing records/responses and their status for every data collection instrument. From here you can select what particular record you want to edit or add to. For Longitudinal Studies, the layout of the table is determined by what instruments you have associated with your defined events. The Record Status Dashboard is by Record ID for every row, and an instrument as part of an Event for every column.

Note: instruments not assigned to an event are not displayed on the Record Status Dashboard

**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 "5" of 5 records ALL (5) records per page

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

Record ID	My First Instrument	Food Survey
1		
2		
3		
4		
5		

## 2. Via a downloadable .pdf of instrument

If you require paper copies of the forms for data entry to take place on paper, you can download a copy of selected or all forms which are a replica of the on-line version of the form. This can be accessed by the 'Download PDF of Instruments' option at the top of each form or via the project setup page

### Training Project

Actions: Modify instrument Download PDF of instrument(s) VIDEO: Basic data ent

**My First Instrument**

Editing existing Record ID 5

**Record ID**

**time**

**email address**

- This survey (blank)
- This survey with saved data
- This survey with saved data (compact)
- All forms/surveys (blank)
- All forms/surveys with saved data
- All forms/surveys with saved data (compact)

Status: Status

**Not started**

I'm done!

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

Add or edit fields on your data collection instruments (survey and forms). This may be done by 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 surveys in the Online Designer.

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

### **3. Double Data Entry**

If you are using the paper copy of the forms to capture data, then you may wish to consider having the double data entry function enabled on your project to ensure quality data collection.

Double data entry is a process where 2 people independently enter the information for the same record and then a 3<sup>rd</sup> person reviews the data using the data comparison tool to verify the correct information where there are discrepancies between both sets of data entry and merges the data into a 3<sup>rd</sup> correct instance.

When this option is enabled, two data entry people will enter data, but instead of saving their data as normal, the Study ID (or unique record identifier) will have either a "--1" or "--2" appended to it, thus marking it as the record entered by data entry person 1 or 2. This is how the data entry people can enter data for the same subject/patient without having a duplicate record. Because all the records entered by the two users will end in the "--#" format, those users can only view the data that they themselves have entered. The "--#" format on the records are hidden from those two users, so to them everything appears as it normally would. However, Reviewers will be able to see the "--#" appended to the records when viewing them. When Reviewers choose to merge the two records entered by the data entry people, the new "third" record is saved without the "--#" appended to the end of the record name. The double data entry feature can be turned on by the REDCap Administrator only.

The double data entry module needs to be turned on through project settings by a REDCap administrator prior to any data collection and users are assigned roles through the user rights page to restrict access for those entering and reviewing data.

### **4. Using the Data Import Tool**

Data can be imported into REDCap from a CSV file, using the data import tool. REDCap generates a template with all columns. Data must be copied into this template; columns may be removed but the first column must always be kept (e.g. study\_id). During data import, data can be added or modified but cannot be deleted.

**REDCap**

Logged in as training | Log out

My Projects  
Project Home or Project Setup  
REDCap Messenger  
Project status: Development

**Data Collection** [Edit Instruments](#)

Survey Distribution Tools  
- Get a public survey link or build a participant list for inviting respondents

Record Status Dashboard  
- View data collection status of all records

Add / Edit Records  
- Create new records or edit/view existing ones

Show data collection instruments

**Applications**

Calendar  
Data Exports, Reports, and Stats  
**Data Import Tool**  
Data Comparison Tool  
Logging  
Field Comment Log  
File Repository  
User Rights and DAGs  
Data Quality  
REDCap Mobile App

**Help & Information**

Help & FAQ  
Video Tutorials  
Suggest a New Feature  
[Contact REDCap administrator](#)

### Training Project

#### 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.
  - All multiple choice fields (e.g., dropdown, radio) must have the raw coded value (rather than the choice label) entered in those cells, or else it cannot be processed. These can be found in the [Codebook](#).
  - 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?**

**Name the imported records automatically (force record auto-numbering)?**

**Upload your CSV file:**

## 5. Mobile data entry via the REDCap App

Using the Mobile App (compatible with both Android and iOS devices), data can be entered off line, saved to the local device and then synced with the project when internet is available. Using the mobile app allows user to enter and review data 'on the go'.

The app is a companion app so the project must also be available on a web browser, and the mobile device must be linked with projects to which you have access.

# The REDCap shared library

The Shared Library can be accessed from the home page of your Project Setup

The REDCap Shared Library is a repository for REDCap data collection instruments and forms that can be downloaded and used by researchers at REDCap partner institutions. Curated instruments highlighted with a star ★ have been approved for inclusion by the REDCap Library Oversight Committee (REDLOC) after review for research relevance, accuracy in function and coding and copyright issues. Other instruments and forms are shared by individuals or groups from consortium institutions on "as-is" basis.



**Not started**

I'm done!

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

Add or edit fields on your data collection instruments (survey and forms). This may be done by 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 surveys in the Online Designer. 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

In the Shared Library, you can browse and search through a collection of data entry forms that have been uploaded by other users. Upon finding a form that sounds useful or interesting, you may view it as a web page or PDF and decide whether or not to incorporate it into your project as a new data form. Some forms may want you to agree to a "Terms of Use," which generally simply requests that you do not claim any of their forms as original works.

# Exporting Data

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. 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.

Click on “Export Data,” either in the All data (all records and fields) row or the row next to your report name.

Logged in as training | Log out

My Projects

Project Home or Project Setup

REDCap Messenger

Project status: Development

Data Collection [Edit instruments](#)

Survey Distribution Tools  
- Get a public survey link or build a participant list for inviting respondents

Record Status Dashboard  
- View data collection status of all records

Add / Edit Records  
- Create new records or edit/view existing ones

Show data collection instruments

Applications

- Calendar
- Data Exports, Reports, and Stats**
- Data Import Tool
- Data Comparison Tool
- Logging
- Field Comment Log
- File Repository
- User Rights and DAGs

## 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
A	<b>All data</b> (all records and fields)	<a href="#">View Report</a> <a href="#">Export Data</a> <a href="#">Stats &amp; Charts</a>	
B	<b>Selected instruments</b> (all records)	<a href="#">Make custom selections</a>	
1	Food survey	<a href="#">View Report</a> <a href="#">Export Data</a> <a href="#">Stats &amp; Charts</a>	<a href="#">Edit</a> <a href="#">Copy</a> <a href="#">Delete</a>
<a href="#">+ Create New Report</a>			

Choose the format for the data export (Excel, SPSS, SAS, R STATA or CDISC ODM (XML))

(Optional) To de-identify the data (i.e., if you have “full data set” export privileges but need to give a de-identified dataset to your statistician) click on the “Remove all tagged identifier fields” option. If your project uses the subjects’ MRN as the Record ID, also click on the “Hash the Record ID field.”

Click on “Export Data.”

Exporting "All data (all records and fields)"

Select your export settings, which includes the export format (Excel/CSV, SAS, SPSS, R, Stata) and if you wish to perform de-identification on the data set.

### Choose export format

- CSV / Microsoft Excel (raw data)
- CSV / Microsoft Excel (labels)
- SPSS Statistical Software
- SAS Statistical Software
- R Statistical Software
- Stata Statistical Software
- CDISC ODM (XML)

### 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?](#)
- Also shift all survey completion timestamps by value between 0 and 364 days (shifted amount determined by algorithm for each record)

[Deselect all options](#)

### Additional export options

- Export survey identifier field and survey timestamp field(s)?

### Advanced data formatting options

**Set CSV delimiter character**  
Set the delimiter used to separate values in the CSV data file (only valid for CSV Raw Data and CSV Labels export formats):  
, (comma) - default

**Force all numbers into a specified decimal format?**  
You may choose to force all data values containing a decimal to have a specified decimal character (comma or period/full stop). This will be applied to all calculations and number-validated text values in the export file.  
Use fields' native decimal format (default)

**NOTE:** Your data formatting selections above will be remembered in the future and will be pre-selected upon your next export.

Export Data Cancel

Click on the data file to download the data.

✓ **Data export was successful!**



The data export was successful, and your data is now ready to be downloaded. Click the download icon(s) below on the right to download your data file. If exporting to a specific statistical analysis package, you will additionally need to download the syntax file that is provided for that stats package. For more details, follow the instructions in the box below.

#### Citation Notice

Please **cite the REDCap project when publishing manuscripts** (citation information and template methods language are [available here](#)).



#### CSV / Microsoft Excel (labels)

You may download the survey results in CSV (comma-separated) format, which can be opened in Excel. You have the choice of downloading the data either with the full headers and answer labels or just with the answer codes (i.e. raw data).

*NOTE: If you are using a version of Microsoft Excel prior to Excel 2007, due to limitations the data will only be read to 255 columns when opened.*

Click icon(s) to download:



[Send file?](#)

## REDCap development lifecycle

Your project will begin in Development mode. This is the stage of designing and testing your data capture instruments. In this stage modifications can be made freely. Once the project is ready to be deployed a request must be made to [redcap@telethonkids.org.au](mailto:redcap@telethonkids.org.au), this is automated via the REDCap system, for the project to be moved to the production stage. Prior to making this request, you should have fully tested the instruments, data validation, branching logic and workflow, to be certain that the data collection instruments and project structure are finalised and fully functional.

Once a project has been moved to production, real study data can be collected. Changes made once the project is in production require additional checks to ensure data integrity is maintained and real (already collected) data not modified or deleted.

To modify a project with 'production' status, the project must firstly be set to 'Draft Mode'. Changes to the database made whilst in draft mode need to be reviewed and approved by a REDCap administrator before they can be moved to production. Submission of changes to the REDCap administrator, for review and action, is an automatic process once 'Submit changes for Review' has been selected.

