



Basic User Guide

Contents

REDCap and Project Information	5
What is REDCap?	5
Features in REDCap include.....	5
Be Prepared	5
HIPAA Compliance and PHI	6
PHI Identifiers	6
Project Status.....	7
REDCap Overview	8
Logging into REDCap.....	8
REDCap Glossary.....	10
REDCap Pages (Tabs) Overview	11
Home Page	11
My Projects Page	12
+ New Project Page.....	12
Help & FAQ Page	12
Training Videos Page	13
Navigation Menu	14
Data Collection Menu	15
Applications Menu.....	15
Help & Information Menu	15
Project Menus (Tabs).....	15
Project Home and Design	16
Project Dashboard	16
Create a New Project.....	17
Project Setup	18
Main project settings.....	18
Design your data collection instruments	18
Online Designer	19
Record Identifier.....	20
Add Fields to Your Data Collection Instruments	20
Examples of Field Types.....	21
Text Box (Short Text, Number, Date/Time, ...)	21
Text Box (Short Text, Number, Date/Time, ...) with a validation of Date (M-D-Y).....	22
Text Box (Short Text, Number, Date/Time, ...) with a validation of Email	23
Text Box (Short Text, Number, Date/Time, ...) with a validation of Number (allows decimals)	23
Text Box (Short Text, Number, Date/Time, ...) with a validation of Integer (a whole number).....	23

Notes Box (Paragraph Text)	24
Calculated Field	24
Multiple Choice – Drop Down List (Single Answer).....	25
Multiple Choice – Radio Buttons (Single Answer).....	26
Checkboxes (Multiple Answers).....	26
Yes – No.....	27
True – False.....	27
Signature (draw signature with mouse or finger)	28
File Upload (for users to upload files).....	28
Slider Visual Analog Scale	29
Descriptive Text (with optional Image/File Attachment)	29
Begin New Section (with optional text)	30
Dynamic Query (SQL).....	30
Add Matrix of Fields.....	30
Edit/Copy/Move/Delete a Field	31
Add Branching Logic	31
Add Piping Logic.....	32
Enable Your Instrument as a Survey	33
Survey Settings	33
Basic Survey Options.....	33
Survey Design Options	34
Survey Customizations.....	34
Survey Access	35
Survey Termination Options	36
Public Survey Link	37
Record Status Dashboard	38
Custom Record Dashboard	39
Enable Optional Modules and Customizations	39
Auto-numbering for records	39
Additional customizations	39
Display the Today/Now button for all date and time fields on forms/surveys?.....	40
Applications	40
Data Exports, Reports and Stats	40
Create New Report	40
Logging	41
User Rights and Permissions.....	42

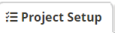
User Roles..... 43

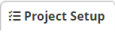
 Create a Role 44

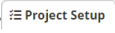
 Add a New User to a Role 44

 Change a User’s Role 45

 Remove a User’s Role 45

Set up Project Bookmarks (optional) 45 

Test Your Project Thoroughly 46 

Move Your Project to Production Status 47 

Additional Training/Support Resources 50

Intermediate Topics..... 50

Advanced Topics..... 51

This guide was created using the documents available for REDCap Administrators:

- Vanderbilt REDCap Training Materials website:
https://redcap.vanderbilt.edu/plugins/redcap_consortium/training_materials.php
- REDCap Help & FAQ tab in software
- REDCap software

REDCap and Project Information

What is REDCap?

REDCap (Research Electronic Data Capture) is a secure, HIPAA and FERPA compliant, web-based application for building and managing online surveys and databases. Vanderbilt University developed REDCap and the software and support is available at no charge to institutional partners: ECU is a member of the REDCap Consortium. ECU houses REDCap (the database and servers), which means that all the data is secure within ECU's IT infrastructure. Multimedia & Technology Services (MTS) administers the REDCap software. This software can be used for research, operational, and quality improvement studies with the appropriate approvals.

Features in REDCap include:

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

Fast and flexible—You can build a database quickly, from conception to production level database or survey in less than a day.

Export data to common data analysis packages—You can export your data to Microsoft Excel, PDF, SAS, Stata, R, or SPSS for analysis.

Ad Hoc Reporting--You can create custom queries for generating reports to view or download.

Scheduling—You can 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—You can 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—You can 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—You can upload and send files to multiple recipients using “Send-it”. This includes 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—You can generate a PDF version of your forms and surveys for printing to collect data offline.

Advanced features--There are other advanced features including auto-validation, calculated fields, file uploading, branching logic, skip logic, and survey stop actions.

REDCap API—You can have external applications connect to REDCap remotely in a programmatic or automated fashion.

Data Queries—You can document the process of resolving data issues using the Data Resolution Workflow module.

Piping—You can inject previously collected data values into question labels, survey invitation emails, etc. to provide a more customized experience.

Be Prepared

Things you should already know about your project

There are several things you should already know about your project before you start creating it in REDCap. The following list of items provide a starting point but will vary on a case-by-case basis. In some projects, you may have more than this planned out already, while others may still be defining the basics.

1. The end goal(s) of your research
2. The specific data you are going to be capturing
3. The type of study you are going to be performing (longitudinal, cross-sectional, etc.)

4. Who will be on your research team and what role will they have

HIPAA Compliance and PHI

The HIPAA Security Rule defines the standards, which require covered entities to implement basic safeguards to protect electronic protected health information (EPHI), which is individually identifiable health information in the electronic form. Privacy depends upon security measures: no security, no privacy.

HIPAA also mandates that covered entities must maintain reasonable and appropriate administrative, physical, and technical safeguards to protect patients' electronic protected health information. This information may be in any electronic format that is stored or transmitted from devices such as desktop or laptop computers, networked systems, disks, CD-ROMs, hand-held device (PDAs), and other clinical-related devices.

Always think about the security of your data—only export when necessary. Take precaution when exporting data and only export data if you need to run reports or analysis outside of REDCap. Limit user privileges to allow export rights only to those who really need it. Note: REDCap is a web-based system. Once data is downloaded from REDCap to a device (ex: computer, laptop, mobile device), the user is responsible for that data. If the data being downloaded is protected health information (PHI), the user must be trained and knowledgeable as to which devices are secure and in compliance with ECU's standards (ex: HIPAA) for securing PHI.

Use the REDCap Send-It feature to send data—Send-It is a secure data transfer application that allows you to upload a file (up to 32MB in size) and then allow multiple recipients to download the file in a secure manner. Each recipient will receive an email containing a unique download URL, along with a second follow-up email with the password (for greater security) for downloading the file. The file will be stored securely and then later removed from the server after the specified expiration date. Send-It is the perfect solution for anyone wanting to send files that are too large for email attachments or that contain sensitive data.

At ECU, we are committed to protecting our patients' privacy and maintaining our organization's security of information. We continue to comply with the HIPAA rule and maintain the confidentiality, security, and integrity of our patients' health information. Note: If you have a question about HIPAA or wish to report a privacy concern, please call: 744-5200 or email: HEALTHCAREPRIVACY@ecu.edu.

PHI Identifiers

There are 18 pieces of information that are considered identifiers (also called protected health information, or PHI) for the purposes of HIPAA compliance. When you indicate a variable as an Identifier, you have the option to "de-identify" your data on data exports. In the Data Export Tool, the identifier variables appear in red and there are de-identification options you can select prior to exporting the data.

The Privacy Rule allows a covered entity to de-identify data by removing all 18 elements that could be used to identify the individual or the individual's relatives, employers, or household members; these elements are enumerated in the Privacy Rule. The covered entity also must have no actual knowledge that the remaining information could be used alone or in combination with other information to identify the individual who is the subject of the information.

The 18 HIPAA Identifiers are:

1. Names
2. All geographic subdivisions smaller than state, including street address, city, county, precinct, Zip Code, and their equivalent geographic codes, except for the initial three digits of a ZIP Code if, according to the current publicly available data from the Bureau of the Census:
 - a. The geographic unit formed by combining all ZIP Codes with the same three initial digits contains more than 20,000 people.
 - b. The initial three digits of a ZIP Code for all such geographic units containing 20,000 or fewer people are changed to 000.
3. All elements (except year) for dates directly related to an individual, including birthdate, admission date, discharge date,

date of death; and all ages over 89 and all elements of dates (including year) indicative of such age, except that such ages and elements may be aggregated into a single category of age 90 and older.

4. Telephone numbers
5. Facsimile numbers
6. Electronic mail addresses
7. Social Security numbers (not allowed in REDCap)
8. Medical Record numbers
9. Health Plan beneficiary numbers
10. Account numbers
11. Certificate/License numbers
12. Vehicle identifier and serial numbers, including license plates
13. Device Identifiers and serial numbers
14. Web Universal Resource Locators (URLs)
15. Internet Protocol (IP) address numbers
16. Biometric Identifiers, including finger and voiceprints
17. Full-face photographic images and any comparable images
18. Any other unique identifying number, characteristic, or code that could identify the individual

Source: U.S. Department of Health and Human Services National Institutes of Health (2017)

Retrieved from https://privacyruleandresearch.nih.gov/pr_08.asp

Project Status

There are five categories also known as project statuses of a project. A project can exist in one of the following five categories at any given time:

Development

All projects when first created start in Development. In Development, you can design, build, and test your REDCap projects. All design decisions can be made in real time and are implemented immediately to your project. All survey and data entry features/functions can and should be tested. In this phase, no real data is entered. If you are conducting a research study, your IRB number is not required until you move into Production mode.

Production

From Development, you will move your project to Production. At this point, you should have fully tested the workflow, data validation and branching logic. You should be certain that your data forms are finalized and fully functional. You should also have your IRB approval number, if applicable. If it was not added to your project initially, you may add it under “Modify project title, purpose, etc.” on the main project dashboard. When you are ready to deploy your project, you will request to have your project moved into Production mode by clicking the button on the Project Setup page. This will send a notification to the REDCap Administrator that you are ready to deploy your project. Once your project is approved for Production, you will receive an email alerting you of your project’s new status. By default, moving a project to Production erases all existing practice records, calendar events, and all other associated practice data. All survey and data entry features/functions will be the same as they are in development except for certain Project Setup features. In this phase, real data is collected. Moving your project to Production prior to collecting real study data ensures you are maintaining data accuracy and integrity.

Draft

When you enter production mode and find that you need to modify an element of your data entry forms, you may enter Draft Mode and submit the changes. Changes to your project configuration and setup are possible, but should be minor and infrequent. Some project and form design updates will require contacting a REDCap Administrator and/or submitting data

collection instrument changes in Draft Mode. Changes to data collection instruments in Draft Mode are not made to your project in real time. After making updates, you must submit the changes for review. Review and approval time are typically done in two business days. This post-production control process provides an additional check to ensure that data in your records are not modified, deleted, or overwritten unintentionally.

From Production, you can move the projects in the following status on the Project Setup > Other Functionality page:

Inactive

Inactive mode is only available once a project is already in Production mode; it is not available in Development mode. Under the “Other Functionality” tab of the project dashboard, you can move your project to inactive status. Ideally, you would move the project to inactive status when data collection is complete, but you would still like to export and analyze the records you have collected. This will disable most project functionality, including access to individual records, but the data will remain available for export and analysis. In this phase, the project is essentially complete. Your project will still be accessible from your My Projects List, but you will see a red “Inactive” icon next to it. Once inactive, the project can be moved back to production status at any time by clicking the “Other Functionality” tab and click “Move to production status”. Since your project was already approved for Production, it does not need another approval; it will be immediately placed back in Production.

Archive

Once you are finished with a project, you may archive it. Unlike the Inactive mode, a project can be moved to Archive mode whether it is in Development or Production mode. You can also move a project into Archive mode directly from Inactive mode. Move the project to archive mode if data collection is complete and/or you no longer wish to view it on My Projects List. Like the Inactive mode, this will disable most project functionality. The project can only be accessed again by clicking the Show Archived Projects link at the bottom of the My Projects page. Once archived, the project can be moved back to production mode at any time by clicking the “Other Functionality” tab and click “Move to production status”.

Note: Once you finish a project, you are required to export all your data to PirateDrive. Once this has been completed and you verify the information is on the PirateDrive, delete the project from REDCap.

Only users that have Project Design and Setup permissions can accomplish transitions of the project status. A project may not necessarily progress through these categories in sequence. Some such as “Practice” projects may never reach production; others may be archived directly once the Production phase is complete.

REDCap Overview

Logging into REDCap

There are three ways to get to REDCap:

1. Type directly into your browser: <https://redcap.ecu.edu>
2. From the ITCS website under Services, click on the “All Services” button on the right. Scroll down to the “Research Computing” category and click on “REDCap Online Research Surveys”, click on the “REDCap Login” button on the right of the page.
3. From the ITCS website under Logins, click on the “All Logins” button on the right. Scroll down to the “REDCap” button.

As an ECU employee, you will always use your ECU PirateID and password. Since REDCap uses your ECU PirateID credentials, whenever you change your password, it is automatically changed for REDCap. Note: If you do not log into REDCap at least once in a 4-month period, your account will be suspended.

The first time you log in, you will need to fill out the “Basic User Information Form”.

Basic User Information Form

Before accessing REDCap, we first need to obtain some basic information about you. Please enter ALL the fields below and then hit the Submit button. Once this information is saved, you can change it any time by navigating to the My Profile page, which you will find the link to at the top right of every page.

Username: **mmtest1**

First name:

Last name:

Email:


Re-enter email:

NOTE: The email address entered above will first need to be verified before access to REDCap is granted. After clicking the Submit button, an email will be sent to that email account, after which you will need to click the link inside the email to verify your email account before accessing REDCap.


After you complete the basic user information, you will receive the “Account created/Verification email sent” display message.

✓ **Account created / Verification email sent**

Your REDCap account has now been created. But to complete the account setup process, you will need to confirm your email address by checking your email account mmtest1@ecu.edu for the account verification email sent by REDCap, and follow its instructions. You will not be able to fully access your REDCap account until the setup process has been completed. Thank you!

 Check your email account mmtest1@ecu.edu

You will then need to check your ECU email account to access the REDCap email needed to complete the login process.

 Thu 5/5/2016 3:52 PM
redcap@ecu.edu
[REDCap] Verify your email address

To ☐ MMTEST1

[This message was automatically generated by REDCap]

To complete the process of setting up a new primary email for your REDCap account with username “**mmtest1**”, you will need to confirm your email address by clicking the link below. You will not be able to fully access your REDCap account until this verification process has been completed. Thank you!

[Click here to confirm your email address](#)

If the link above does not work, try copying the link below into your web browser:
https://redcap.ecu.edu/index.php?user_verify=5K9J46R5bQ4pF6ITqtlc

This link is unique to you and should not be forwarded to others.

Follow the instruction in the email by clicking the link to confirm your email address. Once confirmed, the message “Email account verified!” will be displayed.

✓ **Email account verified!**

Your email account for REDCap has now been verified. You may now access REDCap by clicking the link below.

Click the “Access REDCap” button and you will have access to the application.



To add collaborators to your project or review your knowledge of REDCap Terms & Conditions, please visit [this page](#).

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

Username: Password: [Forgot your password?](#)

REDCap Glossary

Arms: group events into 'arms'; there may be one or more arms/groups per project. Each arm can have as many events as needed. Used in Longitudinal projects.

Branching Logic: may be used when fields/questions need to be hidden for data entry under certain conditions. For example, you may want to hide the question "What is your favorite flavor of ice cream?" until a "Yes" answer is checked for the previous question, "Do you eat ice cream?"

Calendar: a project calendar to help organize the scheduling and keep track of any upcoming events. Data

Access Groups: restricts viewing of data within a database (Ex: in a multi-site study).

Data Collection Instrument: a form or survey created for capturing data. This term is interchangeable with "data entry form".

Data Dictionary: an Excel (.csv--comma separated value format) spreadsheet containing the metadata used to create data collection instruments and fields for your project. The file is uploaded and changes are made to your project.

De-identification: the removal of certain health information that can be explicitly linked or reasonably associated with an individual as defined by HIPAA. See the section on PHI Identifiers.

Double Data Entry: allows two project users to create and edit fields of the same record without seeing one another's data. The double data entry is then checked by a Reviewer then merged into a single entry. This tool is used as a data entry quality control method.

Event: allows for the utilization of data collection forms multiple times for any given project record (used when collecting longitudinal data). An 'event' may be a temporal event during a project, such as a participant visit or a task to be performed.

Field (or Variable or Question): these terms may be used interchangeably and represent unique items of data to be collected and analyzed.

Field Label: the text (actual question or descriptive text) that will be visible to researchers and/or participants during data entry.

File Repository: a repository that stores and retrieves files and documents used for a project. Whenever a data export is performed, the resulting data and syntax files are also stored in the file repository of the project.

Longitudinal Model: this model is designed so that data collection instruments may be used multiple times for any given record/patient so that data for the same fields may be captured repeatedly longitudinally. This model allows users to define events that will be used for the data collection and associated data collection instruments with those events.

Logging: module that lists all changes made to the project, including data exports, data changes, and the creation or deletion of users (audit trail).

Project Status: the statuses of a project are in development, production, draft, inactive, and archived.

Project Type: there are several project types used in REDCap:

- Traditional Project: Classic model with data entry forms
- Single Survey Project: utilizes only one data collection instrument
- Longitudinal Project: multi-use data entry forms with abstract time points
- Longitudinal Project + Scheduling: multi-use data forms with defined time points
- Operations: use case for non-study/non-trial

Record: the set of information for a unique participant or subject. Each record is composed of several fields (pieces of data), which can be spread across multiple form (instruments) per record.

Record ID: a unique identifier for each record in your database. You can label this differently in your project, but the ID must remain the first field in the first data form.

Record Label: information/variables added to the unique ID of the study to help select the right record during data entry. For example, date of birth or last name can be added as record labels when selecting a subject for data entry. Record labels are displayed only and have no impact when exporting data.

Record Status Dashboard: a table that lists all existing records and their status for every data collection instrument. The table uses color-coded icons; Red – Incomplete; Yellow—Unverified; Green—Complete; Grey—Incomplete (no data saved); Orange Check—Partial Survey Response; Green Check—Completed Survey Response.

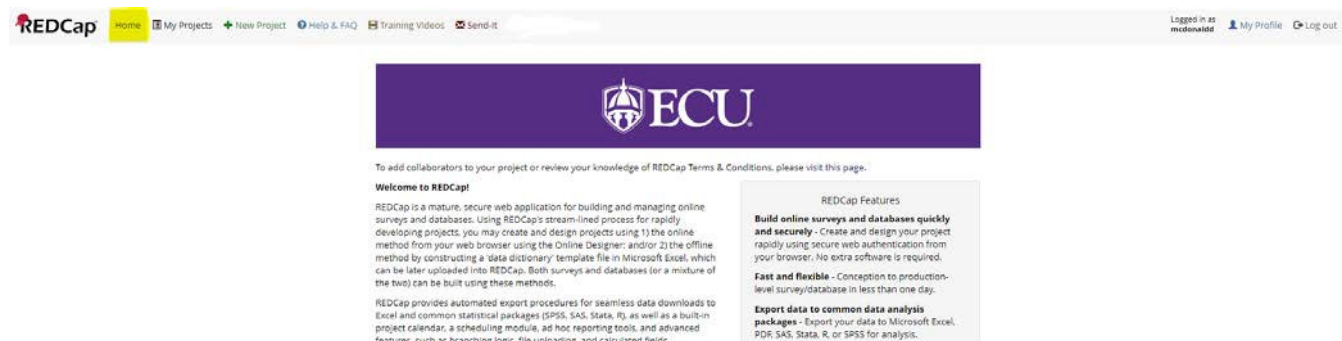
User Rights: the customized privileges that research team members have in terms of data form modification, data entry, and data access. The PI may create “Roles” for groups of team members to ensure consistency in specified user rights.

Variable: the name of the field or answer choice that is stored in the database (not visible during data entry).

REDCap Pages (Tabs) Overview

Home Page

The Home Page (Tab) is the front page of the application; the first page you see when you login. This tab gives a brief overview of REDCap and the features.



In the upper right-hand corner, you will see your user name.

Next to your user name will be the “My Profile” button. You can go to “My Profile” to change your name, email address or password. You can also add additional email addresses to your REDCap account that you can use when sending survey invitations. A verification process is done to ensure you have access to all the email accounts you enter. You can also set your preference on how REDCap displays date/time and numbers.

The default settings are:

- Date and time format: MM/DD/YYYY and 12-hour AM/PM Time

- Number format-decimal character: . period/full stop
- Number format-thousands separator: , (comma)

Next to the “My Profile” button, you will see the “Log out” button. It is recommended that you always log out using the “Log out” button when you are ready to exit REDCap.

My Projects Page

The “My Projects” page (Tab) gives a listing of all the REDCap projects to which you currently have access. Click the project title to open the project.

My Projects

Organize

Filter projects by title

Project Title	Records	Fields	Instrument	Type	Status
Ocularis User Form	1,231	19	3 surveys	■	✓
The Pirate Testing project	6	155	5 forms	■	✓
REDCap Users Group	9	8	1 survey	■	✓
Test Project	0	42	2 forms	■	✓
Ice Cream	0	138	14 forms 1 survey	■	✓
Request form	0	20	1 survey	■	✗

Newly created projects begin in Development status as you begin to build and design them. When you are ready to begin entering real data in the project, you may move it to Production status to designate the project as officially collecting data. When you are finished collecting data or if you wish to stop collection, the project may be set to Inactive status , although it may be brought back to Production status at any time when you are ready to begin collecting data again. Also listed is the project type, which designates if the project is in classic or longitudinal data collection format.

+ New Project Page

The “+ New Project” tab will be discussed in detail after the overview of all the tabs and the navigation overview. This tab contains the steps a user must follow to create a new project.

Help & FAQ Page

The “Help & FAQ” page (Tab) contains several questions and answers relevant to the features and use of the system. This is a good place to check if you need help with a topic. The questions and answers are grouped into categories: General, Project Setup/Design, Data Collection Instrument Design, Data Entry/Collection, Applications, and Making Production Changes. You can also search the page by using Ctrl+F on your keyboard.

HOW TO SEARCH THIS PAGE:
To search for a keyword on this page, use Ctrl+F (or Command+F) on your keyboard.

REDCap Help & FAQ

Select a topic: General

General

Can I transition data collected in other applications (ex: MS Access or Excel) into REDCap?
It depends on the project design and application you are transitioning from. For example, there are a few options to get metadata out of MS Access to facilitate the creation of a REDCap data dictionary:

For Access 2003 or earlier, there is a third-party software (CSD Tools) that can export field names, types, and descriptions to MS Excel. You can also extract this information yourself using MS Access. Table names can be queried from the hidden system table "MSysObjects"; and a table's metadata can be accessed in VBA using the Fields collection of a DAO Recordset, ADO Recordset, or DAO TableDef.

The extracted metadata won't give you a complete REDCap data dictionary, but at least it's a start.
Once you have a REDCap project programmed, data can be imported using the Data Import Tool.
For additional details, contact your local REDCap Administrator.

Training Videos Page

The “Training Videos” page (Tab) gives you access to several training videos and example projects provided by Vanderbilt. They can be accessed at any time while you are using REDCap. The training videos are grouped into sections: Getting Started, Building a Project, Basic Features & Modules, Types of Projects, and Special Features within REDCap Projects.

REDCap

HomeMy ProjectsNew ProjectHelp & FAQTraining VideosSend-It

Logged in as mcdonaldidMy ProfileLog out

REDCap Training Videos

Just Getting Started?

Explore these overviews of fundamental concepts and features.

Title	Description	Watch Video
Brief Overview	A quick summary of what REDCap is and what it can do.	<div><div></div><div>4 minutes</div></div>
Detailed Overview	This video provides an overview of basic functions and features within a REDCap project. It will serve as a starting point for learning about the basic concepts of REDCap, what REDCap projects are, how to create them, and how to use them.	<div><div></div><div>14 minutes</div></div>
Data Entry Overview	A focused exploration of basic data entry workflow. Suitable for training data entry staff.	<div><div></div><div>18 minutes</div></div>

Send-It Page The “Send-It” page (Tab) is where you access the secure data transfer application. “Send-It” allows you to upload a file (up to 32MB in size) and then allow multiple recipients to download the file in a secure manner. Using “Send-It” enable you to send files that are too large for email attachments or that contain sensitive data.

REDCap

HomeMy ProjectsNew ProjectHelp & FAQTraining VideosSend-It

Logged in as mcdonaldidMy ProfileLog out

Send-It

Send-It is a secure data transfer application that allows you to upload a file (up to 32 MB in size) and then allow multiple recipients to download the file in a secure manner. Each recipient will receive an email containing a unique download URL, along with a second follow-up email with the password (for greater security) for downloading the file. The file will be stored securely and then later removed from the server after the specified expiration date. Send-It is the perfect solution for anyone wanting to send files that are too large for email attachments or that contain sensitive data.

Instructions for using Send-It:

Fill out the form below to specify to whom you wish to send the file, as well as other custom information and settings. Each email address you enter below will receive a message stating that a file is available for download. The email will include a unique link and password, which the recipient will use to navigate to the webpage for downloading the file to their computer. If the file is very large, it may take several moments to upload, so please allow it to continue to upload until it notifies you of its completion.

From: mcdonaldid@ecu.edu

To:

Separate email addresses with commas, semi-colons, or line breaks

Email subject: (optional)

Email message: (optional)

User Access Dashboard

The “User Access Dashboard” is a reporting tool designed to assist you in the management of users that have been granted access to your REDCap projects. If you are able to view this dashboard, you have rights to the User Rights application for at least one project. A summary of all the projects in which you are able to grant other users access, or to edit their user privileges, is provided below. The list can be filtered by project status and project purpose. Please review the table every 30 days to ensure that each person listed still requires access to each project. If a user should no longer have access to a given project, you may click the radio button to delete that person from the project or expire that person's access to the project (default yesterday's date). You must click the button at the bottom of the page in order to implement any changes. Changes would then take effect immediately. If you prefer, these updates may still be done within individual projects, as before, but the tool will help streamline the process. It is recommended that you access the User Access Dashboard at least once a month to review which users still have access to your projects. To access the dashboard, click on the “User Access Dashboard” link.

Created by: REDCap Admins
Last Modified: 4/1/2020

13 | Page

To add collaborators to your project or review your knowledge of REDCap Terms & Conditions, please visit this page.

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

Filter projects by title

Project Title	Records	Fields	Instrument	Type	Status
Donna McD Test Project	3	13	2 Surveys		
Ice Cream	3	16	1 Form, 1 Surveys		
IC Project	3	2	1 Form		
Ice Cream Project for Training (Longitudinal)	18	120	1 Form, 2 Surveys		
ECU REDCap Mobile App Request	1	33	1 Surveys		
OnSSI Ocularis User Form	485	18	3 Surveys		
HIPAA System Inventory	190	520	2 Form, 2 Surveys		
Donna McD Test public	0	13	2 Surveys		
Test Project	1	453	1 Form, 2 Surveys		
Test Environment - HSI	15	528	5 Form, 2 Surveys		

Show archived projects

REDCap 6.5.8 - © 2018 Vanderbilt University

[Home](#)
[My Projects](#)
[New Project](#)
[Help & FAQ](#)
[Training Videos](#)
[Send-It](#)

Logged in as **mcDonald**
[My Profile](#)
[Log out](#)

User Access Dashboard

Print Page

The User Access Dashboard is a reporting tool designed to assist you in the management of users that have been granted access to your REDCap projects. If you are able to view this dashboard, you have rights to the User Rights application for at least one project. A summary of all the projects in which you are able to grant other users access, or to edit their user privileges, is provided below. The list can be filtered by project status and project purpose. Please review the table regularly to ensure that each person listed still requires access to each project. If a user should no longer have access to a given project, you may click the radio button to delete that person from the project or expire that person's access to the project (default yesterday's date). You must click the button at the bottom of the page in order to implement any changes. Changes would then take effect immediately, if you prefer, these updates may still be done within individual projects, as before, but the tool will help streamline the process. **Note: Any projects that contain only one user (i.e., you) will *not* be displayed below.**

You last accessed the User Access Dashboard earlier today.

Displaying: Projects of all statuses
 Including projects with "Practice/Just For Fun"
 Reload page

Project title: Donna McD Test Project

Development

2 users (including you)

0 users with API tokens

User	API Token	Project Expiration (M/D/Y)	Last time the user accessed the project	Delete	Expire	
mcDonald* (Donna.McDonald)		—	fresh	<input type="radio"/>	<input type="radio"/>	reset
wallacega (gary.wallace)		—	fresh	<input type="radio"/>	<input type="radio"/>	reset

Project title: Ice Cream

Development

2 users (including you)

0 users with API tokens

User	API Token	Project Expiration (M/D/Y)	Last time the user accessed the project	Delete	Expire	
mcDonald* (Donna.McDonald)		—	fresh	<input type="radio"/>	<input type="radio"/>	reset
wallacega (gary.wallace)		—	fresh	<input type="radio"/>	<input type="radio"/>	reset

REDCap Menu Overview

Navigation Menu

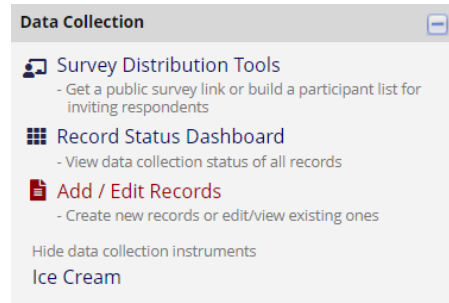
This menu provides navigation options around the REDCap application:

- Return to My Projects list
- Logout -- Logout of REDCap
- My Projects -- Return to My Projectslist
- Project Home -- This page
- Project Setup -- See ProjectSetup

Data Collection Menu

This menu provides links for survey and record operations:

- Survey Distribution Tools -- This menu only shows when you have a survey enabled. This has the Public Survey Link, Participant List (Intermediate Topic), and Survey Invitation Log (Intermediate Topic)
 - Record Status Dashboard -- This menu displays the status of all records (Complete, Unverified, Incomplete, Completed Survey Response, or Partial Survey Response)
 - Add/Edit Records -- This menu allows you to create new records or edit/view existing records
- It also lists the current data instruments for the project.

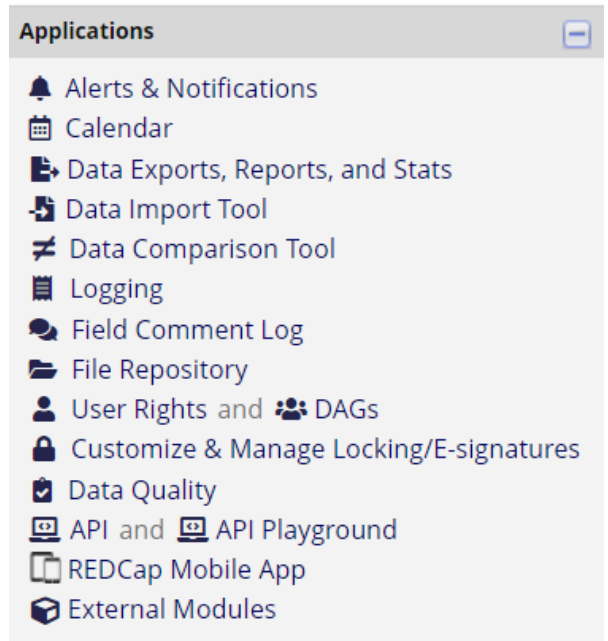


Applications Menu

The “Applications” are REDCap modules that provide functionality for managing your project and the data it contains. These Include:

- Calendar (Intermediate Topic)
- Data Exports, Reports, and Stats
- Data Import Tool
- Data Comparison Tool
- Logging
- Field Comment Log (Intermediate Topic)
- File Repository (Intermediate Topic)
- User Rights and DAGs (Intermediate Topic)
- Record Locking Customization (Advanced Topic)
- E-signature and Locking Mgmt (Advanced Topic)
- Data Quality (Advanced Topic)
- API and API Playground (Advanced Topic)
- REDCap Mobile App (Advanced Topic)
- External Modules (Advanced Topic)

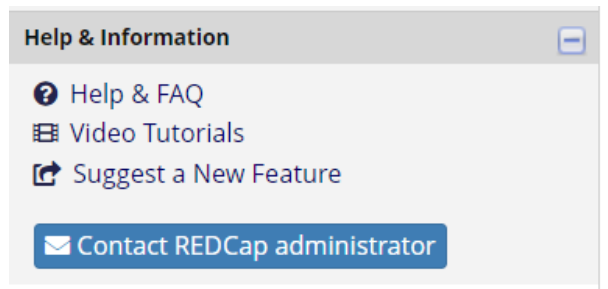
For more detailed information see the “Applications” section.



Help & Information Menu

To menu provides links to REDCap help and training resources:

- Help & FAQ
- Video Tutorials
- Suggest a new feature -- This link will take you to the Vanderbilt website to fill out a form
- Contact REDCap administrator -- This link will email your REDCap question to the administrator (redcap@ecu.edu)



Project Menus (Tabs)

These menus provide access to the main project configuration screens in REDCap. Tabs include:

- Project Home
- Project Setup
- Other Functionality
- Project Revision History

[Project Home](#)
[Project Setup](#)
[Other Functionality](#)
[Project Revision History](#)

Project Home and Design

These are shortcuts to Project “Home” and “Setup”. Applications including “Dictionary” and “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. The Data Dictionary is a specifically formatted CSV (comma delimited) file within which you may construct your project fields and afterward upload the file to commit the changes to your project. The “Project Status” is also provided.

Project Home and Design

[Project Home](#) · [Project Setup](#)
[Designer](#) · [Dictionary](#) · [Codebook](#)
Project status: Development

Project Dashboard

This dashboard provides general information about the project.

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	
User	Expires
mcdonaldd (Donna McDonald)	never

Project Statistics	
Records in project	0
Most recent activity	09/30/2016 1:47pm
Space usage for docs	0.00 MB
Project status	Development

Upcoming Calendar Events (next 7 days)			
	Time	Date	Description
			No upcoming events

Create a New Project

To start a new project, click on the “+ New Project” page (Tab).



Project Title Enter a title for your project

- This can be changed later, if needed.

Purpose of this project

Use the drop down and select the purpose:

- Practice/Just for Fun – use this for creating a practice project to become familiar with the features and learn about REDCap
- Operational Support – use this for tracking specific department information processes
- Research – if this is an IRB approved project, you must enter your PI information, your IRB # and specify the type of research you are doing
- Quality Improvement – use this for any projects that help with goals and performance improvement
- Other – if you choose this option, please specify the purpose of your project

Please Note: No projects with Practice/Just for Fun listed as the purpose will be approved for Production.

Project notes (optional)

Enter any notes or comments regarding the use or purpose of the project.

Start project from scratch or begin with a template

You will generally want to select “Create an empty project (blank slate)”. This will allow you to customize your project to your exact specifications. If you would like to select a template for your project there are several available. Until you become familiar with REDCap choose “Create an empty project (blank slate)” and click “Create Project”.

The image shows the 'Create a new REDCap Project' form. At the top, it says '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.' The form has several sections: 'Project title:' with a text input field containing 'Ice Cream Project for Training'; 'Purpose of this project:' with a dropdown menu set to 'Practice / Just for Fun'; 'Project notes (optional):' with a text area containing 'This project will be used for the Training Class'; and 'Start project from scratch or begin with a template?' with three radio buttons. The first radio button, 'Create an empty project (blank slate)', is selected. Below these are links for 'Add templates (Administrators only)', 'Choose a project template', and a table of available templates. The table has columns for 'Template title (sorted by title)' and 'Template description'. The templates listed are 'Basic Demography', 'Classic Database', 'Human Cancer Tissue Biobank', and 'Longitudinal Database (1 arm)'. At the bottom of the form are 'Create Project' and 'Cancel' buttons.

REDCap 7.4.4 - © 2017 Vanderbilt University

Project Setup

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.

Follow the “Project Setup” tab checklist to build your project.

Main project settings

Select your data collection type:

Use longitudinal data collection with repeating forms: Click “Enable” 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. This is considered an intermediate feature of REDCap and will be discussed in more detail in the Intermediate Training Class. By default, new projects will use the 'classic' data collection format, which is the best option if all data collection instruments will only need to be used once for each subject/record in the project.

Use surveys in this project: Click “Enable” if your project will contain surveys.

Modify project title, purpose, etc.: Click this icon if you would like to change your project title or purpose.

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 Home Project Setup Other Functionality Project Revision History

Project status: Development Completed steps 1 of 7

Main project settings

Complete!

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

REDCap utilizes two types of data collection instruments—Surveys and Forms:

- Surveys: You can have multiple surveys within a project. A survey can be e-mailed to individual participants where they are given unique “Private Survey URL’s” or a survey can be made public. The public survey creates a “Public Survey URL” that can be posted on a website or e-mailed to participant. Private surveys can only be filled out one time and the REDCap project owner can determine which participants have responded to the survey. Public surveys can be filled out multiple times and has no built-in functioning to determine which participants have responded.
- Forms: The forms intended use is in a clinical setting where a researcher enters the data into REDCap. Multiple forms can be used in a project.

REDCap allows projects to use both surveys and forms for data collection.

Project development begins with designing data collection instruments. Instruments are the webpages used to enter your data into REDCap. There are two methods to design instruments: the Online Designer and the Data Dictionary.

Online Designer: The Online Designer will allow you to make project modifications to fields and data collection instruments very easily using only your web browser.

Data Dictionary: Alternatively, you may upload your data dictionary via an Excel csv file in order to build your data collection instruments. Note: This is considered an advanced feature and should not be used unless you are an experienced user. This topic

is covered in the Advanced Training Class.

REDCap Shared Library: The REDCap Shared Library is a global repository of data collection instruments that can be downloaded and used in your project. Note: This is considered an intermediate feature and should not be used unless you are an experienced user. This topic is covered in the Intermediate Training Class.

Project HomeProject SetupOther FunctionalityProject Revision HistoryEdit project settings

Project status: DevelopmentCompleted steps 4 of 7

Complete!

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.

Not started

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 DictionaryExplore 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 VariablesPipingAction Tags

Online Designer

This is the fast, easy way to build instruments entirely online. You can also customize existing instruments and create new ones. The Online Designer makes it easy to customize existing questions and add new questions. REDCap will begin your project with a data collection instrument titled “My First Instrument”. To change the title, go to the Instrument Actions section, click on “Choose action” and select “Rename”. Enter the new title and click “Save”.

Note: While in development status, all field changes will take effect immediately in real time.

Project HomeProject SetupOnline DesignerData DictionaryCodebook

Create snapshot of instrumentsVIDEO: How to use this pageLast snapshot: never

The Online Designer will allow you to make project modifications to fields and data collection instruments very easily using only your web browser. NOTE: While in development status, all field changes will take effect immediately in real time.

Data Collection Instruments

Survey options:

Survey QueueSurvey Login

Survey Notifications

Upload or download Auto Invitations

Add new instrument:

Createa new instrument from scratch

Importa new instrument from the official REDCap Shared Library

Uploadinstrument ZIP file from another project/user or external libraries

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Ice Cream	1		Enable	Choose action	
Add instrument here					

Created by: REDCap Admins
Last Modified: 4/1/2020

19 | Page

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.

A good example of a unique record identifier would be the patient’s MRN. A bad example would be a participant’s last name since there can be several individuals with the same last name (e.g. Smith, Jones, etc.).

The screenshot shows the REDCap Online Designer interface. At the top, there are tabs for 'Project Home', 'Project Setup', 'Online Designer', 'Data Dictionary', and 'Codebook'. Below the tabs, there is a message box that says 'Ready to add fields' and '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.' Below this message, there is a section titled 'This module will allow you to create new data collection instruments/surveys or edit existing ones...' and another section titled 'This page allows you to build and customize your data collection instruments one field at a time...' with instructions on how to add, edit, and delete fields. At the bottom, there is a button labeled 'Return to list of instruments' and a section titled 'Current instrument: Ice Cream' with a 'Preview instrument' button. Below this, there is a form for adding a new field, with a dropdown menu for 'Field Type' and a list of field types including Text Box, Notes Box, Calculated Field, Multiple Choice, Checkboxes, Yes - No, True - False, Signature, File Upload, Slider, Descriptive Text, Begin New Section, and Dynamic Query.

Add Fields to Your Data Collection Instruments

Click “Add Field” and select one of the several field types available:

The screenshot shows the 'Add New Field' dialog box. It contains a message: '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).' Below the message, there is a dropdown menu for 'Field Type' with the text 'Select a Type of Field'. The dropdown menu is open, showing a list of field types: 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), and Dynamic Query (SQL).

Once you have selected your field type, you can then enter the following fields:

- Question Number: This is used for surveys to display the survey question for screen display.
- Field Label: This is how you would format your question or data field.
- Action Tags / Field Annotation: Action Tags are an excellent way to customize the data entry experience for surveys and forms. They are special terms that begin with the “@” sign that can be placed inside a field’s Field Annotation when adding or editing a field. Each action tag has a corresponding action that is performed for the field when displayed on data entry forms and survey pages. Field Annotations can be used to add explanatory notes or commentary about a question/data field, if needed. These notes will not appear on your data collection instrument or survey.
- Variable Name: This is the name of your Field Label that is stored in the database and can be used in reports, exports and analysis. The variable names may contain letters, numbers and underscores but no spaces or special characters. If you decide to change the name of a variable prior to moving your project into production, you must change it

everywhere that it is being used such as calculations, branching logic, etc.

- **Smart Variables:** Field Notation, variable names always point to data fields in the project. However, another type of entity exists called “Smart Variables” that allow you to reference information other than data fields. Smart Variables are context-aware and thus adapt to many different situations in which they can know who the current user is, what event is currently being viewed, whether an instrument is being viewed as a survey or data entry form, etc. In this way, Smart Variables are dynamic (and thus 'smart') because they adapt to the current context in which they are used. Smart Variables are easily distinguishable from field variable names because Smart Variables will have dashes and colons whereas field variable names cannot.
- **Piping:** This feature allows you to inject previously collected data into text on a data collection form or survey, thus providing greater precision and control over question wording. It can also be used in other ways, such as for customizing survey invitations (e.g., by including the respondent's name in the email) or survey completion text (e.g., thanking your respondent by name after completing a survey).
- **Validation:** The Field Type of Text Box (Short Text) will give you the opportunity to select a validation. If you would like to indicate how this field should be entered, use this drop down and select an option.
- **Range Checks (Minimum and Maximum):** Validation types of Date and Time, Integer and Number give you the ability to enter range checks.
- **Required:** Indicate if your field is going to be required. The default setting for all fields is set to No.
- **Identifier:** Indicate if your field is an identifier. All fields that could potentially identify a person should be marked as an identifier, regardless of who will be accessing your data.
- **Custom Alignment:** Select the alignment for your field. The default setting is Right/Vertical.
- **Field Note:** Use this field to enter any notes, reminders or instructions for your field.

Add New Field

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

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

Question Number (optional)
Displayed only on the survey page

Field Label

Action Tags / Field Annotation (optional)

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

Variable Name (utilized in logic, calcs, and exports)

ONLY letters, numbers, and underscores ☒ Enable auto naming of variable based upon its Field Label?

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

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

Enable searching within a biomedical ontology [?](#)
-- choose ontology to search -- ▼

Required? ☒ No ☐ Yes
* Prompt if field is blank

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

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

Field Note (optional)
Small reminder text displayed underneath field

Save **Cancel**

Examples of Field Types

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

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.

Add New Field

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

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

Question Number (optional)

Displayed only on the survey page

Field Label

Enter your first name:

Action Tags / Field Annotation (optional)

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

Variable Name (utilized in logic, calcs, and exports)

first_name_2

ONLY letters, numbers, and underscores

☒ Enable auto naming of variable based upon its Field Label?

How to use

[Smart Variables](#)
[Piping](#)

Validation? (optional)

---- None ----

-- Or --

Enable searching within a biomedical ontology ?

-- choose ontology to search --

Required?* ☒ No ☐ Yes

* Prompt if field is blank

Identifier? ☒ No ☐ Yes

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

Custom Alignment

Right / Vertical (RV)

Align the position of the field on the page

Field Note (optional)

Small reminder text displayed underneath field

Save

Cancel

Enter your first name:

Text Box (Short Text, Number, Date/Time, ...) with a validation of Date (M-D-Y)

I have set this field up with range checks (minimum and maximum fields). I have also made this field required and added a field note.

Add New Field

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

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

Question Number (optional)

Displayed only on the survey page

Field Label

Date of Purchase:

Action Tags / Field Annotation (optional)

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

Variable Name (utilized in logic, calcs, and exports)

date_of_purchase

ONLY letters, numbers, and underscores

☒ Enable auto naming of variable based upon its Field Label?

How to use

[Smart Variables](#)
[Piping](#)

Validation? (optional)

Date (M-D-Y)

Minimum:

01-01-2016

Maximum:

12-31-2018

-- Or --

Enable searching within a biomedical ontology ?

-- choose ontology to search --

Required?* ☒ No ☐ Yes

* Prompt if field is blank

Identifier? ☒ No ☐ Yes

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

Custom Alignment

Right / Vertical (RV)

Align the position of the field on the page

Field Note (optional)

Only dates between 2016-2018

Small reminder text displayed underneath field

Save

Cancel

Date of Purchase:

* must provide value

Today

M-D-Y

Only dates between 2016-2018 are accepted!

Text Box (Short Text, Number, Date/Time, ...) with a validation of Email

Add New Field

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

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

Question Number (optional)
Displayed only on the survey page

Field Label
Enter your email address:

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

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

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

Validation? (optional) Email

– OR –

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

Required? * ☒ No ☐ Yes
* Prompt if field is blank

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

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

Field Note (optional) Only dates between 2016-2018
Small reminder text displayed underneath field

Save Cancel

Enter your email address:

Text Box (Short Text, Number, Date/Time, ...) with a validation of Number (allows decimals)

Add New Field

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

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

Question Number (optional)
Displayed only on the survey page

Field Label
How many times per week do you eat Ice Cream:

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

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

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

Validation? (optional) Number

Minimum:
Maximum:

– OR –

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

Required? * ☒ No ☐ Yes
* Prompt if field is blank

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

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

Field Note (optional) Only dates between 2016-2018
Small reminder text displayed underneath field

Save Cancel

How many times per week do you eat Ice Cream:

Text Box (Short Text, Number, Date/Time, ...) with a validation of Integer (a whole number)

I have set this field up with range checks (minimum and maximum fields). I have also made this field required and added a field annotation.

Add New Field

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

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

Question Number (optional)
Displayed only on the survey page

Field Label
What is your age?

Action Tags / Field Annotation (optional)
We are only collecting data from people who are between 18-100 years of age.
[Learn about @ Action Tags](#) or [using Field Annotation](#)

Variable Name (utilized in logic, calcs, and exports)
age_1
ONLY letters, numbers, and underscores
☒ Enable auto naming of variable based upon its Field Label?

How to use Smart Variables Piping

Validation? (optional) Integer
Minimum: 18
Maximum: 100
– Or –
Enable searching within a biomedical ontology ?
-- choose ontology to search --

Required?* ☐ No ☒ Yes
* Prompt if field is blank

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

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

Field Note (optional) Only dates between 2016-2018
Small reminder text displayed underneath field

Save

Cancel

What is your age:

* must provide value

Notes Box (Paragraph Text)

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: Notes Box (Paragraph Text)

Question Number (optional)
Displayed only on the survey page

Field Label
List all the places you buy Ice Cream:

Action Tags / Field Annotation (optional)

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

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

How to use Smart Variables Piping

Required?* ☒ No ☐ Yes
* Prompt if field is blank

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

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

Field Note (optional)
Small reminder text displayed underneath field

Save

Cancel

List all of the places you buy Ice Cream:

Expand

Calculated Field

This field can perform real-time calculations based on the data from other fields. For an example, you could create a calculation based off of the birth date field and visit date field in order to find out how old the participant was at the time of visit.

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: Calculated Field

Question Number (optional)

Field Label
You are currently _____ years old.

Calculation Equation [How do I format the equation?](#)
`rounddown(datediff("today",[birthday],"y"),-1,0)`

Variable Name (utilized in logic, calcs, and exports)
 ☒ Enable auto naming of variable based upon its Field Label?

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

Required?* ☒ No ☐ Yes
* Prompt if field is blank

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

Custom Alignment Right / Vertical (RV)

Field Note (optional)

Test calculation with a record: --select record-- [Clear calculation](#)

Action Tags / Field Annotation (optional)

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

Save Cancel

You are currently _____ years old.

[View equation](#)

Multiple Choice – Drop Down List (Single Answer)

This field will display your answer choices as a drop down list. When a field contains multiple answer choices, you must give each answer choice a variable name. If you do not, REDCap will automatically assign them for you.

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: Multiple Choice - Drop-down List (Single Answer)

Question Number (optional)

Field Label
What is your favorite flavor?

Choices (one choice per line)
1. 1. Chocolate
2. 2. Strawberry
3. 3. Vanilla
4. 4. Butter Pecan

☒ Enable auto-complete

Raw values for choices were added automatically

The choices listed below did not appear to have a raw value listed but only had a label, so a raw value has been provided for them automatically. If you are not satisfied with these auto generated values, you may change them before saving your changes for this field. The choices in the 'Choices' text box have automatically been modified to reflect these changes.

1 was set as the raw value for 1. **Chocolate**
2 was set as the raw value for 2. **Strawberry**
3 was set as the raw value for 3. **Vanilla**
4 was set as the raw value for 4. **Butter Pecan**

Close

Action Tags / Field Annotation (optional)

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

Save Cancel

REDCap has an auto-complete feature for drop-down fields. When this is enabled, it allows the participant or data entry person to type in a couple of the characters of the answer choice and a list of matching options will appear. For an example, if I typed in Van, Vanilla would automatically appear. This is very helpful when you have a drop down field that contains a large amount of possible answer choices.

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: Multiple Choice - Drop-down List (Single Answer)

Question Number (optional)
Displayed only on the survey page

Field Label
What is your favorite flavor of ice cream.

Choices (one choice per line) [Copy existing choices](#)

1. 1. Chocolate
2. 2. Strawberry
3. 3. Vanilla
4. 4. Butter Pecan

☒ Enable auto-complete for this drop-down [?](#)
[How do I manually code the choices?](#)

Action Tags / Field Annotation (optional)

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

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

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

Required? ☒ No ☐ Yes
* Prompt if field is blank

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

Custom Alignment Right / Vertical (RV) [?](#)
Align the position of the field on the page

Field Note (optional)

Small reminder text displayed underneath field

Save Cancel

What is your favorite flavor of ice-cream?

Multiple Choice – Radio Buttons (Single Answer)

This field will display your answer choices as radio buttons

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: Multiple Choice - Radio Buttons (Single Answer)

Question Number (optional)
Displayed only on the survey page

Field Label
What is your favorite flavor of ice cream.

Choices (one choice per line) [Copy existing choices](#)

1. 1. Chocolate
2. 2. Strawberry
3. 3. Vanilla
4. 4. Butter Pecan

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

Action Tags / Field Annotation (optional)

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

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

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

Required? ☒ No ☐ Yes
* Prompt if field is blank

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

Custom Alignment Right / Vertical (RV) [?](#)
Align the position of the field on the page

Field Note (optional)

Small reminder text displayed underneath field

Save Cancel

What is your favorite flavor of Ice Cream?

☐ Chocolate
☐ Strawberry
☐ Vanilla
☐ Butter Pecan
☐ Mint Chocolate Chip

reset

Checkboxes (Multiple Answers)

This field will display your answer choices as check boxes and will allow more than one answer.

Note: I added a field note that states “Check all that apply”.

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: Checkboxes (Multiple Answers)

Question Number (optional)
Displayed only on the survey page

Field Label
What are your favorite flavors of ice cream.

Choices (one choice per line) [Copy existing choices](#)

2. 2. Strawberry
3. 3. Vanilla
4. 4. Butter Pecan
5. 5. Mint Chocolate Chip

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

Action Tags / Field Annotation (optional)

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

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

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

Required? ☒ No ☐ Yes
* Prompt if field is blank

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

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

Field Note (optional)

Small reminder text displayed underneath field

Save **Cancel**

What are your favorite flavors of Ice Cream?

☐ Chocolate
☐ Strawberry
☐ Vanilla
☐ Butter Pecan
☐ Mint Chocolate Chip

[Check all that apply](#)

Yes – No

This field will display Yes and No as radio button answer choices.

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: Yes - No

Question Number (optional)
Displayed only on the survey page

Field Label
Do you like ice cream

Choices (not modifiable)

1. Yes
0. No

Action Tags / Field Annotation (optional)

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

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

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

Required? ☒ No ☐ Yes
* Prompt if field is blank

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

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

Field Note (optional)

Small reminder text displayed underneath field

Save **Cancel**

Do you like Ice Cream?

☐ Yes
☐ No

[reset](#)

True – False

This field will display True and False as radio button answer choices.

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: True - False

Question Number (optional)

Field Label
You do not like ice cream

Choices (not modifiable)
1, True
0, False

Action Tags / Field Annotation (optional)

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

Variable Name (utilized in logic, calcs, and exports)
you_do_not_like_ice_cream ☒ Enable auto naming of variable based upon its Field Label?

ONLY letters, numbers, and underscores

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

Required? ☒ No ☐ Yes
* Prompt if field is blank

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

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

Field Note (optional)
Small reminder text displayed underneath field

Save Cancel

You do not like Ice Cream! ☐ True ☐ False

reset

Signature (draw signature with mouse or finger)

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

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: Signature (draw signature with mouse or finger)

Question Number (optional)

Field Label
Sign your name

Action Tags / Field Annotation (optional)

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

Variable Name (utilized in logic, calcs, and exports)
sign_your_name ☒ Enable auto naming of variable based upon its Field Label?

ONLY letters, numbers, and underscores

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

Required? ☒ No ☐ Yes
* Prompt if field is blank

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

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

Field Note (optional)
Small reminder text displayed underneath field

Save Cancel

Sign your name: [Add signature](#)

File Upload (for users to upload files)

This field gives the participant the ability to upload a file or image

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: File Upload (for users to upload files)

Question Number (optional)

Field Label
Please upload a picture of you eating ice cream

Action Tags / Field Annotation (optional)

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

Variable Name (utilized in logic, calcs, and exports)
please_upload_a_picture_of ☒ Enable auto naming of variable based upon its Field Label?

ONLY letters, numbers, and underscores

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

Required? ☒ No ☐ Yes
* Prompt if field is blank

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

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

Field Note (optional)
Small reminder text displayed underneath field

Save Cancel

Please upload a picture of you eating Ice Cream:

[+ Upload document](#)

Slider Visual Analog Scale

This field gives you a scale with three answer choices. If you select “Display number value (0-100)”, it will code the answer given and it will display in the box on the right of the scale.

The 'Add New Field' dialog box for a Slider / Visual Analog Scale field type. It includes fields for Question Number, Field Label, Variable Name, and various options like Required, Identifier, Custom Alignment, and Field Note. The 'Field Label' is 'How often do you eat ice cream.' and 'Display number value (0-100)?' is checked.

The Slider Visual Analog Scale field in a form. The question is 'How often do you eat Ice Cream?'. The scale has three labels: 'Once a Year', 'Every Six Months', and 'Once a Month'. A slider bar is positioned between 'Every Six Months' and 'Once a Month'. A text box on the right is empty. A 'reset' button is at the bottom right.

Descriptive Text (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.

The 'Add New Field' dialog box for a Descriptive Text (with optional Image/Video) field type. It includes fields for Question Number, Field Label, Variable Name, and various options like Embed an external video, Attach an image, file, or embedded audio, and Display format of attachment on page. The 'Field Label' is 'The sundae is a sweet ice cream dessert. It typically consists of one or more scoops of ice cream topped with sauce or syrup and in some cases other toppings including sprinkles and whipped cream.'


Link:

The sundae is a sweet ice cream dessert. It typically consists of one or more scoops of ice cream topped with sauce or syrup, and in some cases other topics including sprinkles and whipped cream.

Attachment: [sundae.jpg](#) (0.01 MB)

Inline Image:

The sundae is a sweet ice cream dessert. It typically consists of one or more scoops of ice cream topped with sauce or syrup, and in some cases other topics including sprinkles and whipped cream.



Begin New Section (with optional text)

This field is used as a section header. You can add text or leave blank.

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:

Begin New Section (with optional text)

Field Label

Demographic Information

Save

Cancel

With optional text:

Demographic Information

With no text:

Dynamic Query (SQL)

The "SQL" field type allows one to populate a drop-down list on a REDCap project's data entry form or survey by providing an SQL query ("select" queries only) in the Online Designer for a field or in the Select Choices column of the Data Dictionary. Note: This is considered an advanced feature and should not be used unless you are an experienced user. This topic is covered in the Advanced Training Class.

Add 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, you would click Add Matrix of Fields. You would 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 Field

Add Matrix of Fields

Add Matrix of Fields

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

Matrix Header Text (optional)

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

Matrix Rows

Each row represents a different field with its own label and variable name.

☒ Enable auto naming of variable based upon its Field Label?

Field Label	Variable Name <small>ONLY letters, numbers, and underscores</small>	Question Number <small>(optional)</small>	Required? <small>Field Annotation ?</small>
Chocolate	chocolate		
Strawberry	strawberry		
Vanilla	vanilla		
Butter Pecan	butter_pecan		
Mint Chocolate Chip	mint_chocolat		

Matrix Column Choices

Choices (one choice per line)

- Never
- Rarely
- Sometimes
- Often
- Always

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
ice_cream_matrix What is a matrix group name?


Save **Cancel**


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


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

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 

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

Variable: favorite_ice_cream


   

What is your favorite flavor of ice-cream?

- ☐ Chocolate
- ☐ Strawberry
- ☐ Vanilla
- ☐ Butter Pecan
- ☐ Mint Chocolate Chip

[Check all that apply](#)

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. 

For an example, I only want the “If Other, please specify” field to show if the answer to the question above it was Other.

What is your favorite flavor of Ice Cream?

- ☐ Chocolate
- ☐ Strawberry
- ☐ Vanilla
- ☐ Other

[reset](#)

Variable: other_text

If other, please specify

After clicking on the double green arrows, scroll through the list of field choices and drag and drop the field you want to base your branching logic on. Click “Save” once finished.

Add/Edit Branching Logic

Branching Logic may be employed when fields/questions need to be hidden under certain conditions. If branching logic is defined, the field will only be visible if the conditions provided are true (i.e. show the field only if...). You may specify those conditions in the text box below for the Advanced Branching Logic Syntax or by choosing the Drag-N-Drop Logic Builder method, which allows you to build your logic in a much easier fashion by simply dragging over the options you want. You may switch back and forth between each method if you wish, but please be aware that since the advanced logic allows for greater complexity, it may not be able to be switched over to the Drag-N-Drop method if it becomes too complex.

Choose method below for the following field: **if_other_please_specify** - *If other, please specify.*

☒ **Advanced Branching Logic Syntax**
How to use

Show the field ONLY if...

[Clear logic](#)

Test logic with a record:

— OR —

☒ **Drag-N-Drop Logic Builder**

Displaying field choices for the following data collection instrument:

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

Show the field ONLY if...
☒ ALL below are true
☐ ANY below are true

[Clear logic](#)

The field now alerts me that branching logic exists. If I want to view or modify the existing branching logic, I would click on the double green arrows.

Variable: if_other_please_specify **Branching logic: [favorite] = '4'**

If other, please specify.

Add Piping Logic

Piping gives you the ability to insert answers and place it in various places within REDCap. More information is available in the Advanced User Guide and the Advanced Training Class.

For an example, I have a field that asks the participant “What kind of ice cream do you like?”. I then have another field that asks the participant “How often do you eat ice cream?”. I have added piping logic in my second question so that it will insert the answer from the first question.

Before:

What kind of Ice Cream do you like?

☐ Chocolate
☐ Strawberry
☐ Vanilla

[reset](#)

How often do you eat _____ Ice Cream?

☐ Once a week
☐ Twice a week
☐ Three times a week

[reset](#)

One the participant answers the first question; the answer is then inserted into my next question.

After:

What kind of ice cream do you like?

☒ Chocolate
☐ Strawberry
☐ Vanilla

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

☐ Once a week
☐ Twice a week
☐ Three times a week

To add piping, all you have to do is add the variable name of the field you want to pipe in. The variable name must be inserted into square brackets [].

Edit Field

You may add a new project field to this data collection instrument by completing the fields below and clicking the Save button at the bottom. When you add a new field, it will be added to the form on this page. For an overview of the different field types available, you may view the [Field Types video \(5 min\)](#).

Field Type: Multiple Choice - Radio Buttons (Single Answer)

Question Number (optional):

Field Label: How often do you eat [favorite_icecream] ice cream.

Choices (one choice per line):

1. Once a week
 2. Twice a week
 3. Three times a week

Action Tags / Field Annotation (optional):

Variable Name: how Often do you eat_favor

Required*: ☒ No ☐ Yes

Identifier*: ☒ No ☐ Yes

Custom Alignment: Right / Vertical (RV)

Field Note (optional):

Piping can be used in many different places in REDCap such as:

- Field Labels
- Field Notes
- Section Headers
- Survey Instructions & Survey Completion Text

Enable Your Instrument as a Survey

Once you have enabled the “Use surveys in this project” setting under Project Setup, you will want to indicate which data collection instruments are going to be used as surveys.

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

Project status: Development Completed steps 4 of 7

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.

Under Online Designer, click “Enable” next to the data collection instrument you want to use as a survey.

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

Create snapshot of instruments [VIDEO: How to use this page](#)
 Last snapshot: never [?](#)

The Online Designer will allow you to make project modifications to fields and data collection instruments very easily using only your web browser. NOTE: While in development status, all field changes will take effect immediately in real time.

Data Collection Instruments

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
Ice Cream	26	PDF	Enable	Choose action	

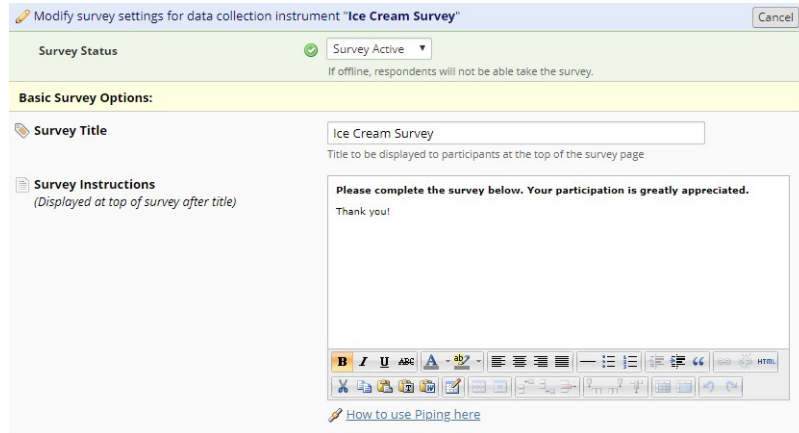
Survey Settings

Once you enable your data collection instrument as a survey, the “Set up my Survey” page will appear.

Basic Survey Options

Survey Title: Enter a survey title. It does not have to be the same name as your form.

Survey Instructions: Enter any instructions you wish to give to the participant. The default instructions are “Please complete the survey below. Thank You!”



Survey Design Options

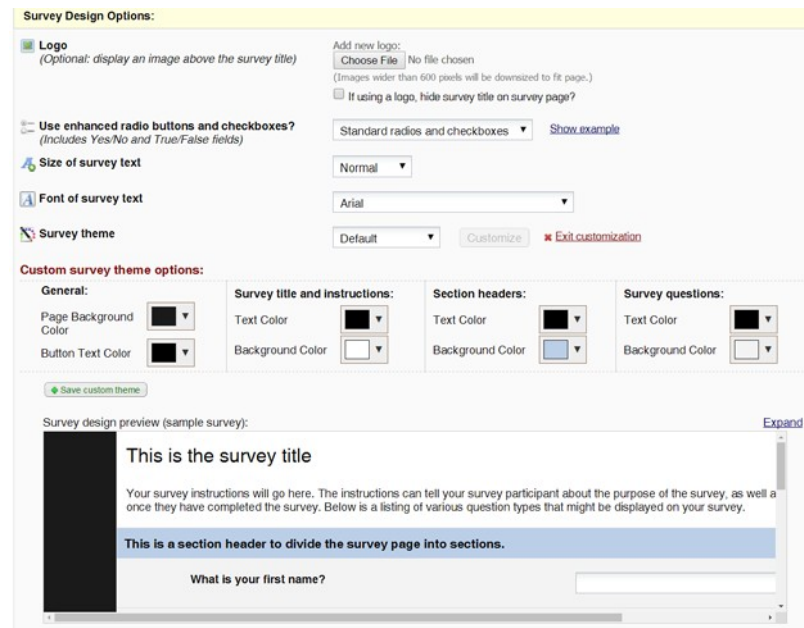
Logo: Click the “Choose File” button to add a logo. To add the ECU logo, please see the graphic directory on the website.

Use enhanced radio buttons and checkboxes: Click the dropdown to choose between “Standard radios and checkboxes” and “Enhanced radios and checkboxes”. Using Enhanced the text and background colors are customizable. Also, the choices will stack into a single column if viewed on a mobile device.

Size of survey text: Use the drop down and select Normal, Large or Very Large.

Font of survey text: Use the drop down and select the font family you would like to use.

Survey Theme: Use the drop down to select a saved survey theme. You can also click “Customize” and change the color of your backgrounds, fonts and buttons. If you would like to use the same color choices at a later date, click the “Save custom theme” button.



Survey Customizations:

Question Numbering Custom numbered ▾

Question numbers will not display correctly if using auto numbering if some questions have branching logic employed. Question auto numbering has been automatically disabled because some of your survey questions use branching logic.

Question Display Format
(One page or multiple pages?) 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?
Display a button for the participant to download a PDF file of their responses for the survey they just completed. No ▾

This option will not be available if the Survey Auto-continue or Survey Queue auto-start option is enabled. Also, if a field utilizes the @HIDDEN action tag, it will not be displayed in the PDF.

Survey-specific email invitation field
Designate an email field for sending survey invitations for this survey only. -- select a field -- ▾

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

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

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

Allow survey respondents to view aggregate survey results after completing the survey?
After completing the survey, participants can view ALL responses in aggregate graphical format and/or as descriptive statistics. Also, the individual respondent's answers will be highlighted in the results. Disabled ▾

Additional settings:

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

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

Text-To-Speech functionality
(Allows text on survey page to be read audibly to participants.) Disabled ▾

When enabled, icons will be displayed next to all text on the survey page, and when clicked, the text will be read out loud to the participant (must have computer speakers turned on).

NOTICE: All text that is spoken is sent to a service hosted at Vanderbilt University that utilizes the IBM Watson Text-to-Speech API service. Be advised that if the survey utilizes piping, for privacy concerns, data piped from Identifier fields will *not* be sent to the service with the rest of the text but will instead be redacted.
[Administrators: How to disable this feature](#)

Survey Customizations

Question Numbering: REDCap can auto number your questions for you or you may custom number your questions.

Question Display Format –

All on one page: Select this if you would like all of your questions placed on one page.

One section per page (multiple pages): Select this option if you would like to like to break your survey up into sections by your section headers (the yellow banner bars). If you select this option, you can display the page numbers at the top of the survey page.

Allow participants to download a PDF of their responses at end of survey: The default setting is No. If you change it to yes, a button will display for the participant to download a PDF of their responses for the survey they just completed.

Survey-specific email invitation field: You must select a field to designate an email field for sending survey invitations for this survey only. Note: This option will override the project level email invitation field and will also override any email address originally entered the Participant List. Also, if this field has no value and the project-level email field is enabled, then the project-level email field's value will be used instead.

For “Required” fields, display the red ‘must provide value’ text on the survey page: The default setting is Yes. If you do not wish to have the ‘must provide value’ field display on your survey, use the drop down and select No.

Allow survey respondents to view aggregate survey results after completing the survey: The default setting is Disabled. Otherwise you may choose to display Graphical Plots, Descriptive Statistics or both plots and statistics. If you enable this setting, you can choose the minimum number of responses before participants are allowed to view the aggregate data.

Text-To-Speech functionality: The default settings is Disabled. When enabled, icons will be displayed next to each text that is listed on the survey. When clicked, the text will be read out loud to the participant.

Survey Access


Response Limit (optional): You can limit the number of responses to collect. Here you set the maximum number of responses to prevent respondents from starting the survey after your set number of responses has been collected.

Time Limit for Survey Completion (optional): You can set the amount of time each respondent has to complete the survey based on when they were initially sent the survey invitation. Note: This feature excludes public survey links.

Survey Expiration (optional): You can enter a date/time you would like for your survey to expire. After this time, the survey will become inactive.

Allow 'Save & Return Later' option for respondents: You can enable this option if you would like your participants to be able to come back and finish taking their survey. If enabled, the participant will receive a generated code they must enter in order to continue. You can also indicate if you would like your participants to be able to return and modify their completed responses.

Survey Access:


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

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

Will include


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


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

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


days hours minutes

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

 **Survey Expiration (optional)**
(Time after which the survey will become inactive.) ?

 M/D/Y H:M

The time must be for the time zone **America/New_York**, in which the current time is **11/12/2018 08:40**.

 **Allow 'Save & Return Later' option for respondents?**
(Allow respondents to leave the survey and return later.) ?

☐ Allow respondents to return without needing a return code ?

☐ Allow respondents to return and modify completed responses ?

Survey Termination Options

(Optional) Auto-continue to next survey: Click this if you have more than one survey and you would like the next survey to automatically start as soon as this survey is completed.

Redirect to a URL: If you would like the participant to be redirected to another URL after they have completed their survey, enter the full URL.

Survey Completion Text: Enter any text you would like to display after the participant has finished taking your survey. The default text is "Thank you for taking the survey. Have a nice day!"

PDF Auto-Archiver: You can enable this feature if upon survey completion, you would like a compact PDF copy of the survey response automatically stored in the project's File Repository. This archived PDF can be downloaded at any time.

Send confirmation email (optional): If you would like the participant to receive a confirmation email once they have completed the survey, use the drop down and select "Yes". Enter the subject and the body of the message. You may also add an attachment to the email by clicking Choose File. Click "Save Changes" once finished.

Survey Termination Options:

☐ **(Optional) Auto-continue to next survey:** Automatically start the next survey instrument after finishing this survey [?]

— OTHERWISE —

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

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

[How to use Piping here](#)

— OR —

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

Thank you for taking the survey.
Have a nice day!

[How to use Piping here](#)

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

☐ Disabled
☐ Enabled

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

No ▼

Save Changes

-- Cancel--

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.

Public Survey Link

Using a public survey link is the simplest and fastest way to collect responses for your survey. Responses are collected anonymously. To set up the public survey link, you must make your first instrument a survey. This was done in a previous step. Under the Data Collection menu choose "Survey Distribution Tools" The Public Survey URL is shown in the middle of the screen.

Logged in as **mottelerc** | Log out

My Projects or Control Center

Project Home

Project Setup

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

Record Locking Customization

Survey Distribution Tools

Public Survey Link **Participant List** **Survey Invitation Log**

Using a public survey link is the simplest and fastest way to collect responses for your survey. You may obtain the survey link below to email it to your participants. Responses will be collected anonymously (unless the survey contains questions asking for identifying data from the participant). **NOTE:** Since this method uses a single survey link for all participants, it allows for the possibility of participants taking the survey multiple times, which may be necessary in some cases.

To obtain the survey link, copy the URL below and paste it into the body of an email message in your own email client. Your email recipient(s) can then click the link to begin taking your survey.

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 Embed Code

To send the URL in via, simply click on the “Send me URL via email” button. REDCap will send you an email with the links.

To add the link to a webpage, click on the “Get Embed Code” button. Now copy the HTML in the text box to place it within the HTML code of any webpage. It will show up as a link on that webpage so that anyone can easily click the link to begin taking your survey.

Logged in as **mottelerc** | Log out

My Projects or **Control Center**

Project Home

Project Setup

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

Record Locking Customization

E-signature and Locking Mgmt

Data Quality

API and API Playground

REDCap Mobile App

Survey Distribution Tools

Public Survey Link

Participant List

Survey Invitation Log

Using a public survey link is the simplest and fastest way to collect responses for your survey. You may obtain the survey link below to email it to your participants. Responses will be collected anonymously (unless the survey contains questions asking for identifying data from the participant). **NOTE:** Since this method uses a single survey link for all participants, it allows for the possibility of participants taking the survey multiple times, which may be necessary in some cases.

To obtain the survey link, copy the URL below and paste it into the body of an email message in your own email client. Your email recipient(s) can then click the link to begin taking your survey.

Public Survey URL:

Copy the HTML in the text box below to place it within the HTML code of any webpage. It will show up as a link on that webpage so that anyone can easily click the link to begin taking your survey.

Embed HTML code <>

Link Actions

Link Customizations

Open public survey

Open public survey + Log out

Send me URL via email

Survey Access Code or QR Code

Get Embed Code

Record Status Dashboard

This is a table that lists all existing records/responses and the status for every data collection instrument. You may click on one of the icons in order to open the data collection instrument for a specific record.

Logged in as **mcDonaldD** | Log out

My Projects

Project Home

Project Setup

Project status: **Development**

Data Collection [Edit instruments](#)

Manage Survey Participants

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

Record Status Dashboard

- View data collection status of all records

Add / Edit Records

- Create new records or edit/view existing ones

Show data collection instruments

Applications

Calendar

Data Exports, Reports, and Stats

Data Import Tool

Data Comparison Tool

Logging

Field Comment Log

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.

Dashboard displayed: [Default dashboard]

Create custom dashboard

Displaying record of 3 records records per page

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

Record ID	Ice Cream Survey	Test 1
1		
2		
3		

Legend for status icons:

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

Custom Record Dashboard

You may create your own customer version of the Record Status Dashboard by setting up the configuration options. Only users with Project Setup/Design privileges will be able to create custom dashboards. Once a customer dashboard has been created, it will be viewable to all users in the project.

Custom Record Dashboard
You may create your own custom version of the Record Status Dashboard by setting up the configuration options below. Only users with Project Setup/Design privileges will be able to create custom dashboards. Once a custom dashboard has been created, it will be viewable to all users in the project.

Dashboard title:

Description / instructions:
(Optional) Displayed near top of page

Header orientation:

Horizontal (default) ▼ Use 'Vertical' to transpose headers for a more compact display.

Select instruments:
(Optional) Include/exclude specific instruments (to display less columns)

Filter logic:
(Optional) Filter the records displayed based on conditional logic
(e.g., [age] > 30 and [gender] = "1")

Sort by:
Sort the records by the value of a specific field in either ascending or descending order

record_id "Record ID" ▼ in Ascending order ▼


Save dashboard

Cancel

Enable Optional Modules and Customizations

Auto-numbering for records

If the first form in your project is a survey, auto-numbering will automatically be enabled. Otherwise if you would like REDCap to generate a new unique record name, you may enable this feature manually.


Optional

I'm done!

Enable optional modules and customizations

Disable

☒ Auto-numbering for records ?

Enable

☒ Scheduling module (longitudinal only) ?

Enable

☒ Randomization module ?


Enable

☒ Designate an email field to use for invitations to survey participants ?

Additional customizations

Additional customizations

You can make additional customizations to your project by clicking on the “Additional customizations” button. A list of the additional customizations will be listed and you can select the options needed. When you are finished choosing your options, click “Save”. Note: Most of the items listed will be discussed in the Intermediate and Advanced User Training Classes.


Complete!

Not complete?

Enable optional modules and customizations

Enable

☒ Repeatable instruments ?

Disable

☒ Auto-numbering for records ?

Enable

☒ Scheduling module (longitudinal only) ?

Enable

☒ Randomization module ?

Enable

☒ Designate an email field for sending survey invitations ?

Additional customizations

Display the Today/Now button for all date and time fields on forms/surveys?

If you do not wish to have the Today icon appear next to your date fields, you may turn this setting off by clicking on Additional Customizations. Uncheck the box next to “Display the Today/Now button for all date and time fields on forms/surveys”.

☒ **Display the Today/Now button for all date and time fields on forms/surveys?**
If enabled, a 'Today' button will be displayed to the right of all date fields, and a 'Now' button will be displayed to the right of all time, datetime, and datetime_seconds fields. Clicking the button will automatically set the field's value with the current date or time.

Applications

Data Exports, Reports and Stats


This application will allow you to easily view reports of your data, as well as export your data to Microsoft Excel, SAS, Stata, R or SPSS for analysis. If you wish to export your *entire* data set or view it as a report, then Report A is the best and quickest way. If you want to view or export data from only specific instruments (or events) on the fly, then Report B is the best choice.

Data Exports, Reports, and Stats

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

[+ Create New Report](#) [My Reports & Exports](#) [Other Export Options](#)

This module allows you to easily view reports of your data, inspect plots and descriptive statistics of your data, as well as export your data to Microsoft Excel, SAS, Stata, R, or SPSS for analysis (if you have such privileges). If you wish to export your *entire* data set or view it as a report, then Report A is the best and quickest way. However, if you want to view or export data from only specific instruments (or events) on the fly, then Report B is the best choice. You may also create your own custom reports below (if you have such privileges) in which you can filter the report to specific fields, records, or events using a vast array of filtering tools to make sure you get the exact data you want. Once you have created a report, you may view it as a webpage, export it out of REDCap in a specified format (Excel, SAS, Stata, SPSS, R), or view the plots and descriptive statistics for that report.

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

Report A:

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).
- ☐ Shift all dates 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](#)

Report B:

My Reports & Exports

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

Select one or more instruments below for all records:

Instruments

- All Instruments
- Ice Cream

[View Report](#) [Export Data](#) [Stats & Charts](#)

OR

[+ Create report](#) based on the selections above

Create New Report

You may also create your own custom reports 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. To create a new report, click on the “+ Create New Report” button.

My Reports & Exports

	Report name	View/Export Options	Management Options	Report ID (auto-generated)
A	All data (all records and fields)	View Report Export Data Stats & Charts		
B	Selected instruments (all records)	<p>Select one or more instruments below for all records.</p> <p>Instruments</p> <div> -- All instruments -- Ice Cream </div> <p> View Report Export Data Stats & Charts </p> <p>OR</p> <p>Create report based on the selections above</p>		
+ Create New Report				

You can create a new report by selecting the fields/variables that you want to include in the report. You may add as many fields to your report as you wish, and you can choose which users may view this report. You will also need to provide a name for your report, which will then be displayed on the project's left-hand menu for anyone to whom you have given access. You can filter the results returned in the report in a variety of ways, including using complex AND/OR logic. When you are finished, click the “Save Report” button at the bottom. The new report will then be added to your list of reports, after which you may immediately begin viewing them or exporting them. 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.

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

STEP 1

User Access: Choose who can view this report

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

STEP 2

Fields to include in report

Add all fields from selected instrument: -- choose instrument --

Field	Field Name	Instrument	Action
Field 1	record_id "Study Id"	Instrument: Form 1 Set Up As A Survey	<input checked="" type="checkbox"/>
Field 2	mc_dropdown "Multiple Choice (Drop Des)"	Instrument: Form 1 Set Up As A Survey	<input checked="" type="checkbox"/>
Field 3	-- select a field --	Instrument:	

Additional fields to include in report (optional)

☐ Include the survey identifier field and survey timestamp fields?/?

STEP 3

Filters (optional)

Operator / Value

Filter 1: mc_dropdown "Multiple Choice (Drop Des)" = Chocolate

AND

Filter 2: -- select a field --

Switch format: [Use advanced logic](#)

STEP 4

Order the Results (optional)

First by: record_id "Study Id" Ascending order

Then by: Type variable name or field label Ascending order

Then by: Type variable name or field label Ascending order

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

Logging

This is where you can view audit information. This application will list the date and time and user that made changes made to the project. This includes data exports, data changes and the creating or deletion of users. You may also download the entire logging record, just note this may take some time for large or active projects. Note: It does not give you the details of the changes made.

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

Filter by event: All event types (excluding page views) ▾
 Filter by user name: All users ▾
 Filter by record: All records ▾
 Displaying events (by most recent): 1 - 28 ▾

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

User Rights and Permissions

Access to individual projects is coordinated by the project owner (Principal Investigator) using the “User Rights” module. The project owner may delegate this task to other users by granting them permission to access the User Rights module.

Note: Do not ask the REDCap Administrator to grant a user access to your project.

If you would like to grant other users access to your project, click on “User Rights”.

Project Home and Design

[Project Home](#) · [Project Setup](#)
[Designer](#) · [Dictionary](#) · [Codebook](#)
 Project status: **Development**

Data Collection

[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

[Alerts & Notifications](#)
[Calendar](#)
[Data Exports, Reports, and Stats](#)
[Data Import Tool](#)
[Data Comparison Tool](#)
[Logging](#)
[Field Comment Log](#)
[File Repository](#)
[User Rights and DAGs](#)
[Customize & Manage Locking/E-signatures](#)
[Data Quality](#)
[API and API Playground](#)
[REDCap Mobile App](#)
[External Modules](#)

Help & Information

[Project Home](#) [Project Setup](#) [User Rights](#) [Data Access Groups](#)

This page may be used for granting users access to this project and for managing the user privileges of those users. You may also create roles to which you may assign users (optional). User roles are useful when you will have several users with the same privileges because they allow you to easily add many users to a role in a much faster manner than setting their user privileges individually. Roles are also a nice way to categorize users within a project. In the box below you may add/assign users or create new roles, and the table at the bottom allows you to make modifications to any existing user or role in the project, as well as view a glimpse of their user privileges.

Add new users: Give them custom user rights or assign them to a role.

— OR —

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

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

Enter the person’s last name in the Add new user field. If the person is found, click on their name and then click on Add with custom rights. If the person is not found, this either means they do not have access to REDCap or they have not set up their user profile. If they are an ECU employee, you can add them to your project by entering their PirateID. You cannot add them by their email address.

Correct way: mcdonaldd Incorrect way: mcdonaldd@ecu.edu

Once you click “Add with custom rights” button, you will now choose what you want the user to have access to. Select the appropriate rights and then click “Add user”. Note: More detailed User Rights and DAG (Data Access Groups) topics will be discussed in the Intermediate Training Class.

Basic Rights

📅 Expiration Date (if applicable)

(M/D/Y)

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

* De-identified means that all free-form text fields will be removed, as well as any date/time fields and Identifier fields.

☐ 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:

📧 Survey Distribution Tools

☑

📅 Calendar

☑

Data Entry Rights

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

	No Access	Read Only	View & Edit	Edit survey responses
Ice Cream (survey)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>

User Roles

A role is simply a template of user rights. Users assigned to a role are granted the appropriate set of rights that the role. User roles are useful for your project when you have several users who will require the same user privileges. Instead of creating privileges individually, you can add a role and assign user to that role. For research teams of four or more people, creating roles is recommended. Users can be assigned, reassigned, or unassigned to roles at any time. Note: Any user assigned to a role will assume the user privileges of that role.


Role	Description	Rights
Principal Investigator	Primary individual in charge of and responsible for the proper conduct of a research project and assuring all regulatory issues are addressed, regardless of the funding source.	Full rights to all functions in project
Administrator	Person responsible for assisting the PI in assuring all regulatory issues are addressed and that research standards are adhered to.	Full rights to all functions in project

Project Coordinator	Person responsible for the day-to-day management of the research project to include, REDCap data instruments, and overall management of enrollment and data collection.	Full data export, calendar, data import, data comparison, logging, file repository, user rights, data access group, stats & charts, data quality create & edit rules and execute rules, add/edit reports, project design and setup, record locking customization, API import and export, locking/unlocking records, allow locking of forms, data entry rights view & edit, create records, rename records, delete records, edit survey responses, survey distribution tools.
Data Coordinator	Person responsible for the development of REDCap data instruments and the overall management of the project data.	Full data export, data import, data comparison, logging, stats & charts, data quality create & edit rules and execute rules, add/edit reports, data entry rights view & edit, create records, rename records, delete records, edit survey responses
Statistician	Person responsible for the development of the study design and the review and analysis of collected data.	De-identified data export, remove all tagged identifier data export, stats & charts, data quality create & edit rules and execute rules,
		lock/unlock records disabled, data entry rights read only
Project Staff	Assists other staff as appropriate.	De-identified data export, remove all tagged identifier data export, calendar, data import, file repository, stats & charts, add/edit reports, lock/unlock records disabled, data entry rights view & edit, create records
Read Only	Assists other staff as appropriate with limited, read-only access.	No export, stats and charts, add/edit reports, lock/unlock records disabled, data entry rights read only
Data Entry	Assists with the creation of records and data entry only.	No export, add/edit reports, lock/unlock records disabled, data entry rights view & edit, create records

Create a Role

Creating a role is similar to creating a user with custom rights. Enter the new role name and click the “Create role” button.

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



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

You may set the rights for the user role 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. To save your selections, click the "Create role" button at the bottom of the page.

Creating new role "Investigator"

Basic Rights

Highest level privileges:

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

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

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

* De-identified means that all free-form text fields will be removed, as well as any date/time fields and Identifier fields.
- Add/Edit/Organize Reports ☒

Also allows user to view ALL reports (but not necessarily all data in the reports)
- Stats & Charts ☒

Other privileges:

- Survey Distribution Tools ☒
- Calendar ☒
- Data Import Tool ☒
- Data Comparison Tool ☒
- Logging ☐
- File Repository ☒

Data Entry Rights

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

	No Access	Read Only	View & Edit	Edit survey responses
Ice Cream (survey)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>

Add a New User to a Role

To add a user to a role, enter the username into the "Assign new user" box, click "Assign to role" and select the role to which the user will be assigned.

Assign new user

Assign to role ▼

✔ User "mcdonald" has been successfully ASSIGNED to the user role "Investigator".

Change a User's Role

You can change a user's role or assign an unassigned user to a role by clicking on the user's name, then clicking "Assign to role" and then selecting the role.

Administrator

[No users assigned]

Investigator

mcdonald (Donna McDonald)

User actions:

Remove from role

Re-assign to other role ▼

Administrator

Investigator

Remove a User's Role

You can remove a user's role by clicking on the user's name, then clicking "Remove to role". Note: The user's privileges will remain the same, you will need to edit their access rights.

	mottelerc (Chris Motteler)	User actions: Remove from role Re-assign to other role ▼
Administrator	mcDonald (Donna McDonald)	
Investigator	[No users assigned]	


NOTICE: User's privileges will remain the same

Please note that since you removed the user from a role, that user will maintain the exact same user privileges that they had while in the role previously.

Close

Set up Project Bookmarks (optional) Project Setup

You can create custom bookmarks to webpages that exist inside or outside of REDCap. Bookmarks will be seen as links on the left hand project menu and can be accessed by those who have access to your project.


Optional
I'm done!

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

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


This module will allow you to set up project bookmarks (i.e. custom links) that point to webpages that exist inside REDCap (i.e. other REDCap projects) or outside REDCap (i.e. webpages on a different server on the web). You can create simple web links for navigating to those webpages, and the links will be displayed on the left-hand project menu. You may set various settings for each link, such as defining the label for how it appears on the left-hand menu, whether or not the link opens a new window/tab in your web browser, and which individual users (or Data Access Groups) within your project will be able to utilize these bookmarks.

Test Your Project Thoroughly Project Setup

It is extremely important to test your project before moving it into production! The purpose of testing your database is to ensure that it has the structure and integrity checks that you expect and that it meets your requirements. Entering practice data will often lead to more instrument changes.

Testing a database means doing much more than simply verifying that it contains the desired fields: you need to verify that each field has the appropriate properties (data type, identifiers, allowed range, allowed values) and that cross-field data validations work as you expect.

Make sure you have tagged all fields containing PHI Identifiers. Does the field contain identifying data (any of the 18 pieces of information that are considered identifiers), is so you need to check for identifiers? This module will help you assess whether some fields may be identifiers, and then allows you to easily tag such fields as identifiers for greater data security.



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](#)

You also need to create test records and enter some data to ensure that your data collection instruments look and work how you expect, especially branching logic and calculations. You can do this by clicking “Add/Edit Records” in the Data Collection section. If you have surveys, complete the surveys as if you were a participant by using the Public Survey Link.



Logged in as mottelerc | Log out

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

Project Home and Design

- [Project Home](#) · [Project Setup](#)
- [Designer](#) · [Dictionary](#) · [Codebook](#)
- Project status: **Development**

Data Collection

- [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

- [Alerts & Notifications](#)
- [Calendar](#)
- [Data Exports, Reports, and Stats](#)
- [Data Import Tool](#)
- [Data Comparison Tool](#)
- [Logging](#)

Ice Cream Project for Training

Add / Edit Records

You may view an existing record/response by selecting it from the drop-down lists below. To create a new record/response, click the 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 Study ID

[+ Add new record](#)

Data Search

Choose a field to search (excludes multiple choice fields)

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

Once you have some test records entered, review them by going to your “Record Status Dashboard”; create reports and export your data and view in Excel or one of the statistical analysis packages; review your Stats.

Note: It is recommended that you export your test data for review prior to moving your project into Production.

The best way to test your project is to use it as if you were entering real production data, and it is always helpful to have colleagues (especially team members) take a look at your project to get a fresh set of eyes looking at it.

Move Your Project to Production Status Project Setup

When you are ready to begin entering real data, use the Project Setup tab to move the project to production status. Once in

production, you will not be able to edit the project fields in real time. However, you can make edits in Draft Mode, which will then need to be approved by a REDCap administrator before taking effect.

You are strongly encouraged to test your project thoroughly before you move your project into Production. Once you have ensured your project is capturing all of the fields you need and has all of the design elements, click on the Move project to production icon.



Not
started

Move your project to production status

Move the project to production status so that real data may be collected. Once in production, you will not be able to edit the project fields in real time anymore. However, you can make edits in Draft Mode, which will be auto-approved or else might need to be approved by a REDCap administrator before taking effect.

Go to [Move project to production](#)

Are you sure you wish to leave the DEVELOPMENT stage? If you proceed, the project will be moved to PRODUCTION status so that real data may be collected. If you select the 'Delete ALL data' option below, all current collected data, calendar events, and uploaded documents will be deleted, otherwise all will remain untouched as the project is moved to production.

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

Keep existing data or delete?

- ☐ Keep ALL data saved so far.
- ☐ Delete ALL data, calendar events, documents uploaded for records/responses, survey responses (if applicable), and any logging events pertaining to data collection.

Once in production, you will not be able to edit the project fields in real time anymore. However, you can make edits in Draft Mode, which will be auto-approved or else might need to be approved by a REDCap administrator before taking effect.

YES, Move to Production Status

Cancel

Note: Moving a project from development mode to production mode is done by the REDCap Administrator.

Logged in as mottelerc | [Log out](#)

My Projects or Control Center

Project Home and Design

- Project Home · Project Setup
- Designer · Dictionary · Codebook
- Project status: **Production**

Data Collection

- Survey Distribution Tools
- Record Status Dashboard
- Add / Edit Records
- Show data collection instruments

Applications

- Alerts & Notifications

Project Home
 Project Setup
 Other Functionality
 Project Revision History
 [Edit project settings](#)

Success! The project is now in production.

Project status: Production **Completed steps 5 of 7**

Complete!

Main project settings


Use surveys in this project?

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

Use longitudinal data collection with defined events?

Production mode looks much like development mode, but production has extra precautions to protect saved data. All survey and data entry features/functions will be exactly the same as they are in development with the exception of certain Project Setup features.

The Online Designer and Data Dictionary can still be used to modify instruments. You can only make edits in Draft Mode, which will then need to be approved by a REDCap administrator before taking effect.



Optional

Modify your data collection instruments in Draft Mode

Once in production, you may still modify or add fields to the project, if you desire. This may be done by either using the Online Designer (online method) or by uploading a Data Dictionary (offline method), in which you may use either method or both. Quick links: [Download PDF of all data collection instruments](#) OR [Download the current Data Dictionary](#)

Go to or

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

Enter Draft mode to make and submit changes to the instruments.

NOTE:
The project is currently in **PRODUCTION** status, and thus changes cannot be made in real time to the project as when in **Development** status. However, changes to the project may be drafted in **DRAFT MODE**, after which such changes will be reviewed and approved by a REDCap administrator. Once those changes are approved, you will then receive an email confirmation informing you that those changes have taken effect on your production project.

[Share your instruments with others via the REDCap Shared Library](#)

Would you like to enter **DRAFT MODE** to begin drafting changes to the project?

Enter Draft Mode

Additional Training/Support Resources

If you have questions or need additional training, please email redcap@ecu.edu

Intermediate Topics

The following features will be included in the REDCap Intermediate User Training Class. Please login to Cornerstone to see the upcoming classes.

Import an Instrument from the REDCap Shared Library

Data Entry Overview

Survey Topics

- Survey Queue, Survey Login & Survey Notifications
- Automated Invitations
- Stop Survey Action
- Participant List, Compose Survey Invitations & Survey Invitation Log

Define events and designate instruments

- Longitudinal data collection
- Define events & Designate Instruments for My Events

Enable optional modules and customizations

- Repeatable instruments
- Scheduling module (longitudinal only)
- Designate an email field to use for invitations to survey participants
- Set a custom record label
- Define a secondary unique field
- Order the records by another field
- Enable the Field Comment Log or Data Resolution Workflow (Data Queries)
- Enable the Data History widget for all data collection instruments
- Require a 'reason' when making changes to existing records

Applications

- Calendar & Scheduling
- Field Comment Log
- File Repository
- User Rights and DAGs

Data Export

Advanced Topics

The following features will be included in the REDCap Advanced User Training Class. Please login to Cornerstone to see the upcoming classes.

- How to Use Piping
- Create additional Arms
- Randomization Module
- Data Dictionary
- Data Import Tool
- Data Comparison Tool
- Double Data Entry
- Record Locking Customization
- E-signature and Locking Mgmt
- Data Quality
- Data Entry Trigger
- API
- Dynamix Query (SQL)
- Calculated Fields
- Customizing Text
- Logging
- Reports