

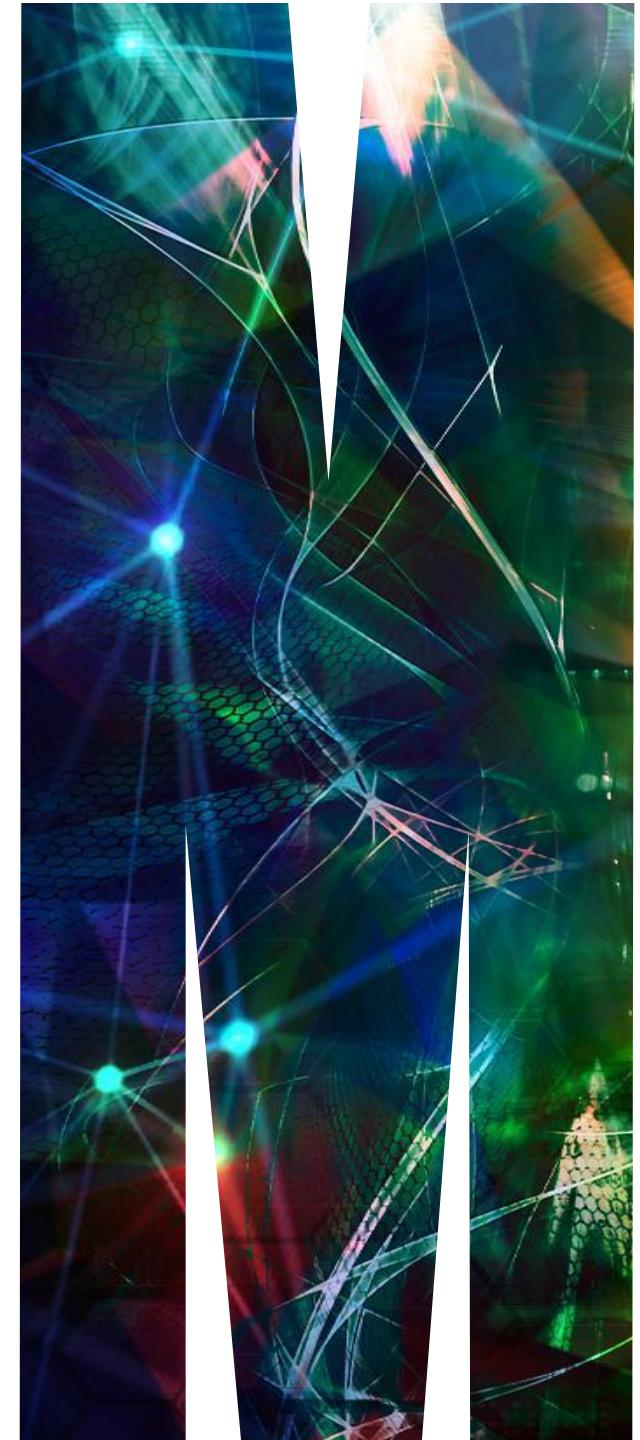
# Introduction to REDCap™

El Leemann

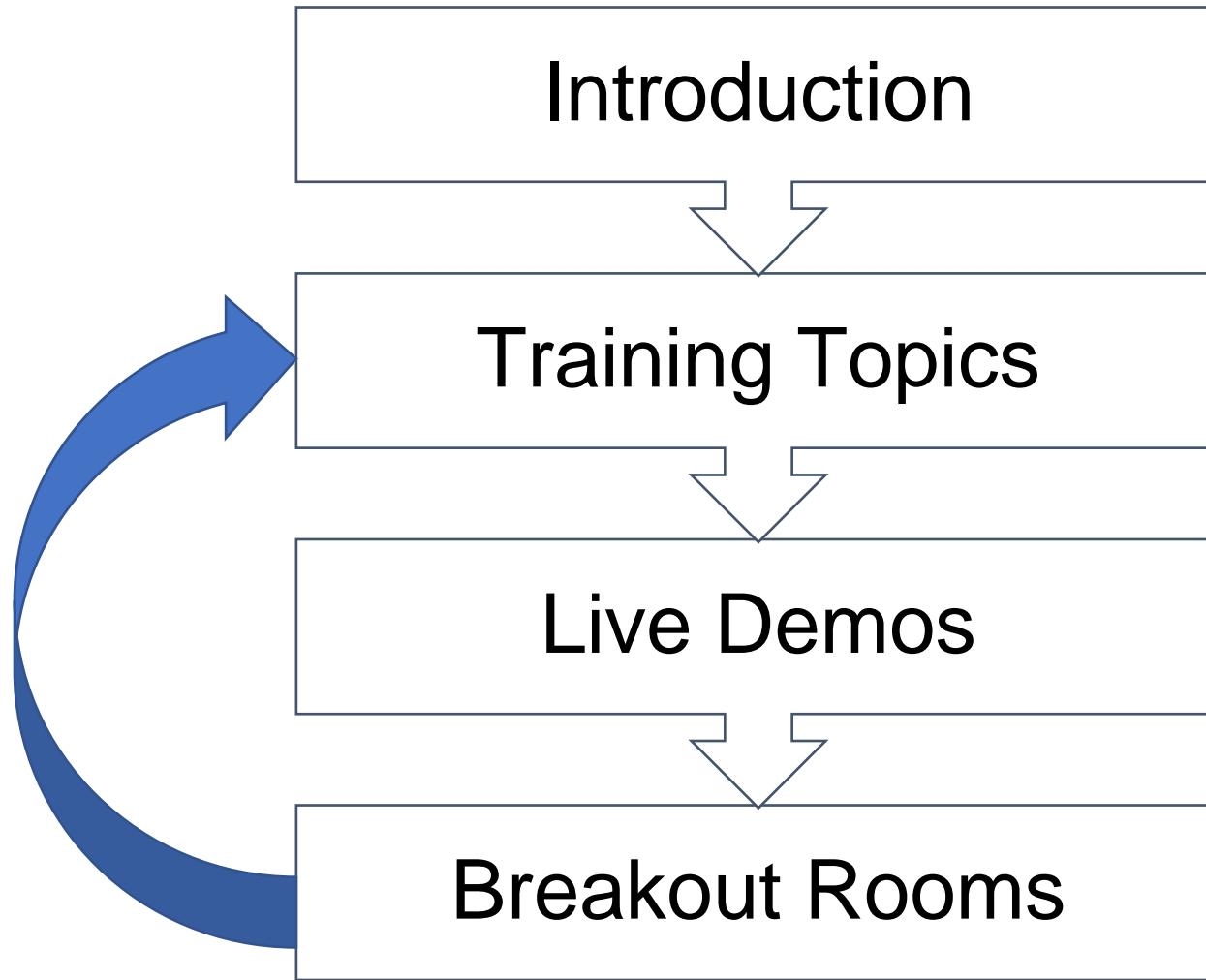
REDCap Administrator

Helix

[redcap@monash.edu](mailto:redcap@monash.edu)



# Course Approach



# History and Background



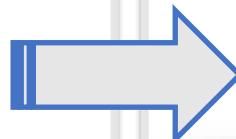
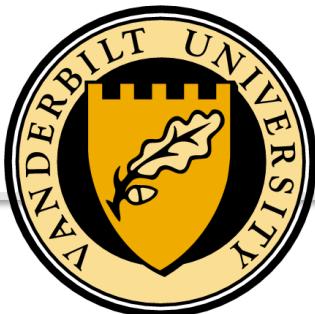
# Who Created REDCap and Who Uses it?

THEN

2004: Developed at Vanderbilt Univ.

2006: Global consortium started

**2014: Monash joined**



NOW

Worldwide:

+5890 institutions /146 countries

+1.3M projects

+2M users

**REDCap @ Monash:**

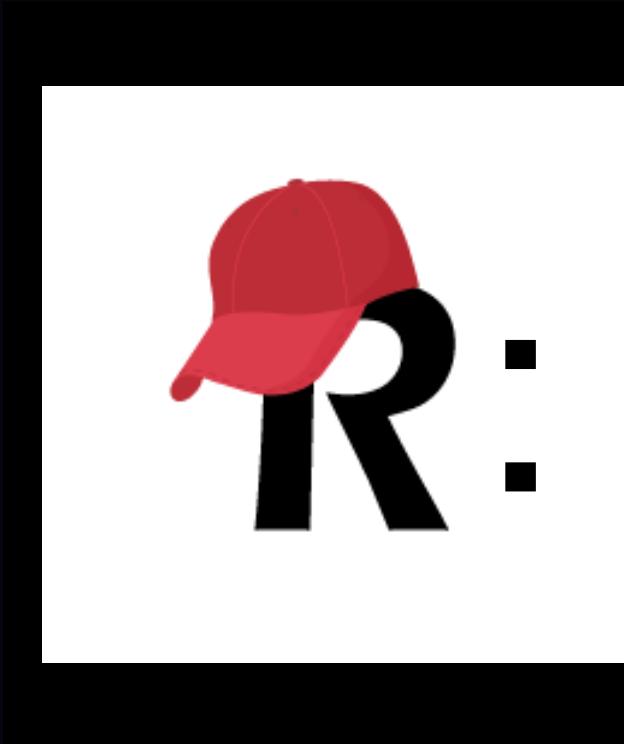
+1000 projects

+3700 users



REDCap is licensed  
for free to non-profits  
around the world

# What is REDCap?



*A secure web  
application for  
managing your data  
online*

# REDCap Acronym

**R**esearch  
**E**lectronic  
**D**ata  
**C**apture

~~Redcap~~  
~~RedCap~~  
~~Redcap~~  
~~RedCAP~~  
**REDCap**



# What is it for?

## Use Cases



Clinical Research  
and Clinical Trials



Global Health

Community Research



Operational Support

Basic Research

# Advantages of REDCap

## Accessible

- web-based access (on and off campus)
- access for multi-site collaborations

## Customisable

- fast and flexible to design
- modifications at anytime

## Accurate

- ensures consistent and accurate data entry
- data quality checks to look for errors

## Secure

- Data are stored in a secured area
- Daily backup and software upgrades

## Supported

- User group and training

# REDCap @Monash

<https://www.monash.edu/researchinfrastructure/helix/capabilities/redcap>

- User charges (free)
- Terms of Use (citation)
- How to request?
- General help and support
- Customisation support

The screenshot shows the Monash Helix website. At the top, there's a blue header bar with the Monash Australia logo, a search icon, and links for Courses, Library, Donate, STAFF, STUDENTS, ALUMNI, and a magnifying glass icon. Below the header, the Monash University logo and a '60 YEARS OF MAKING A DIFFERENCE' banner are visible. The main navigation menu includes HOME, ABOUT US, CAPABILITIES, PARTNERSHIPS, and CONTACT US. On the right, a box says 'READ OUR LATEST STORIES ON MONASH LENS'. The main content area has a sub-navigation 'Capabilities' with a 'Monash REDCap' button highlighted in blue. To the right, under 'Monash REDCap', there's a brief description of the application, its features (automated export to Excel, SPSS, SAS, Stata, R), and data security (stored in Australia, backed up daily). Below this is a 'Key Features and Benefits' section with three bullet points: 'Web-based access (on or off campus)', 'Access for multi-site collaborations', and 'Fast and flexible to design'.

## Capabilities

### Monash REDCap

Monash SeRP

CogStack

Secure Hosting and Data Transfer

Application Development

Data Governance

Clinical Trials and Clinical Registries

## MONASH HELIX

HOME ABOUT US CAPABILITIES PARTNERSHIPS CONTACT US

Home | Capabilities | Monash REDCap

## Monash REDCap

REDCap is a secure, web-based application to create and manage research databases and/or participant surveys. It is developed to help researchers collect and manage sensitive data effectively and responsibly. REDCap's streamlined process for rapidly creating and designing projects offers a vast array of tools that can be tailored to virtually any data collection strategy.

REDCap provides automated export procedures for seamless data downloads to Excel and common statistical packages (SPSS, SAS, Stata, R), as well as a built-in project calendar, a scheduling module, adhoc reporting tools, and advanced features, such as branching logic, file uploading, and calculated fields.

Data collected through REDCap will be directly and permanently stored on infrastructure located in Australia and managed by Helix. Data stored on this infrastructure is backed up daily. All traffic between the data collector's personal device, the web server(s), the database server(s), and the file server(s) is encrypted.

## Key Features and Benefits

- Web-based access (on or off campus)
- Access for multi-site collaborations
- Fast and flexible to design

# REDCap @Monash

How do I get access to REDCap?

Monash University Research

The P.I. must be from Monash University

<https://redcap.link/monashredcap>

Monash Health Translation Precinct (MHTP) Research

The P.I. must be from MHTP, Hudson or Monash University

<https://redcap.link/mhtpredcap>

# REDCap @Monash



and  
Individualised Support  
(cost recovery basis)

# Training Topics

## Project Setup

---

- Design your data instruments
- Enable modules and customisations
- User Rights and Permissions
- Testing your project
- Moving to production

# Training Topics

## Applications & Tools

- Record status dashboard
- Field history
- Data Dictionary
- Codebook
- Logging
- Data export
- Reports

# Training project

My Project	Study ID : _____
Demographics Form	
Date : _____	
Study ID:	
First name:	
Last Name:	
DOB: (dd-mm-yyyy)	
Age:	
Gender:	<input type="checkbox"/> Male <input type="checkbox"/> Female <input type="checkbox"/> Other
If 'Other', please specify	
Email:	

My Project	Study ID : _____
Diagnosis Form	
Date : _____	
Primary Diagnosis: _____	
Comorbidities:	
(Tick all that apply, or 'none of the above')	
<input type="checkbox"/> Diabetes	
<input type="checkbox"/> Renal Insufficiency	
<input type="checkbox"/> Myocardial	
<input type="checkbox"/> Other/s	
If Other/s, please specify _____	
<input type="checkbox"/> None of the above	

# Project Setup



# REDCap Access: <https://redcap-training.helix.monash.edu/>



[Log In](#)

This is a TRAINING site only. DO NOT enter live data.



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

Username:	traininguserXX	
Password:	.....	

 [Log In](#)    [Forgot your password?](#)

# My Projects



## Welcome to REDCap!

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

REDCap provides automated export procedures for seamless data downloads to Excel and common statistical packages (SPSS, SAS, Stata, R), as well as a built-in project calendar, a scheduling module, ad hoc reporting tools, and advanced features, such as branching logic, file uploading, and calculated fields.

Learn more about REDCap by watching a [brief summary video \(4 min\)](#). If you would like to view other quick video tutorials of REDCap in action and an overview of its features, please see the [Training Resources](#) page.

**NOTICE:** If you are collecting data for the purposes of human subjects research, review and approval of the project is required by your Institutional Review Board.

If you require assistance or have any questions about REDCap, please contact

## REDCap Features

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

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

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

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

**Scheduling** - Utilize a built-in project calendar and scheduling module for organizing your

This is a TRAINING site only. DO NOT enter live data.



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	Collapse All	Filter projects by title		
Project Title	Records	Fields	Instruments	Type	Status
<b>Unorganized Projects</b> (1)	0	2	1 form		
<a href="#">2021 - Training 01</a>					

Logged in as traininguser01

[Log out](#)

[My Projects](#)

[Project Home and Design](#)

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

[Designer](#) · [Dictionary](#) · [Codebook](#)

Project status: Development

[Data Collection](#)

[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](#)

[Project Dashboards](#)

[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](#)

[External Modules](#)

[Help & Information](#)

[Help & FAQ](#)

[Video Tutorials](#)

[Suggest a New Feature](#)

## 2021 - Training 01

PID 731

[Project Home](#)

[Project Setup](#)

[Other Functionality](#)

[Project Revision History](#)

Project status:  Development

Completed steps 0 of 7

### Main project settings



Not started

I'm done!

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

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

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

### Design your data collection instruments



Not started

I'm done!

Go to [Online Designer](#) or [Data Dictionary](#)

Explore the [REDCap Instrument 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](#) [Field Embedding](#) [Special Functions](#)

### Enable optional modules and customizations



Optional

I'm done!

Repeatable instruments [?](#)

Auto-numbering for records [?](#)

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

Randomization module [?](#)

Designate an email field for communications (including survey invitations and alerts) [?](#)

Additional customizations

### Set up project bookmarks (optional)

# Online Designer

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

Project status:  Development

Completed steps 1 of 8



Complete!

[Not complete?](#)

## Main project settings

[Enable](#) Use surveys in this project? [?](#)[VIDEO: How to create and manage a survey](#)[Disable](#) Use longitudinal data collection with defined events? [?](#)

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



Not started

[I'm done!](#)

## Design your data collection instruments

Add or edit fields on your data collection instruments. This may be done by either using the Online Designer (online method) or by uploading a Data Dictionary (offline method). Quick links: [Download PDF of all instruments](#) OR [Download the current Data Dictionary](#).

Go to

 [Online Designer](#)

or

 [Data Dictionary](#)

Explore the

 [REDCap Shared Library](#)

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

Learn how to use  [Smart Variables](#)

[Piping](#)

[Action Tags](#)



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# Online Designer

[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

Add new instrument:

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

	Instrument name	Fields	View PDF	Instrument actions
	My First Instrument	1		<a href="#">Choose action</a>  <a href="#">Rename</a> <a href="#">Copy</a> <a href="#">Delete</a> <a href="#">Download instrument ZIP</a>

# Online Designer

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

[Create snapshot of instruments](#) [VIDEO: How to use thi](#)

Last snapshot: never [?](#)

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

## Data Collection Instruments

Add new instrument:

[Create](#) a new instrument from scratch

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

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

Instrument name	Fields	View PDF	Instrument actions
Demographics	1		<a href="#">Choose action</a>
<a href="#">Add instrument here</a>			
Diagnosis	0		<a href="#">Choose action</a>
<a href="#">Add instrument here</a>			
My Survey	0		<a href="#">Choose action</a>
<a href="#">Add instrument here</a>			

# Online Designer

Variable: record\_id

**Record ID**

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

**Add Field** **Add Matrix of Fields**

**Add New Field**

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

**Field Type:**

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

# Step 2: Online Designer

This page allows you to build and customize your existing ones. New fields may be added by clicking the **Edit** icon. If you decide that you do not want to keep fields, simply **drag and drop** a field to a different location. Changes will take effect immediately in real time.

[Return to list of instruments](#)

Current instrument: **Demographics**

Variable: record\_id

**Record ID**

NOTE: The field above is the record ID field and thus cannot be deleted.

Add

**Add New Field**

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

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

**Field Label:** First Name

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

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

**Validation?** (optional) ---- None ----  
- OR -

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

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

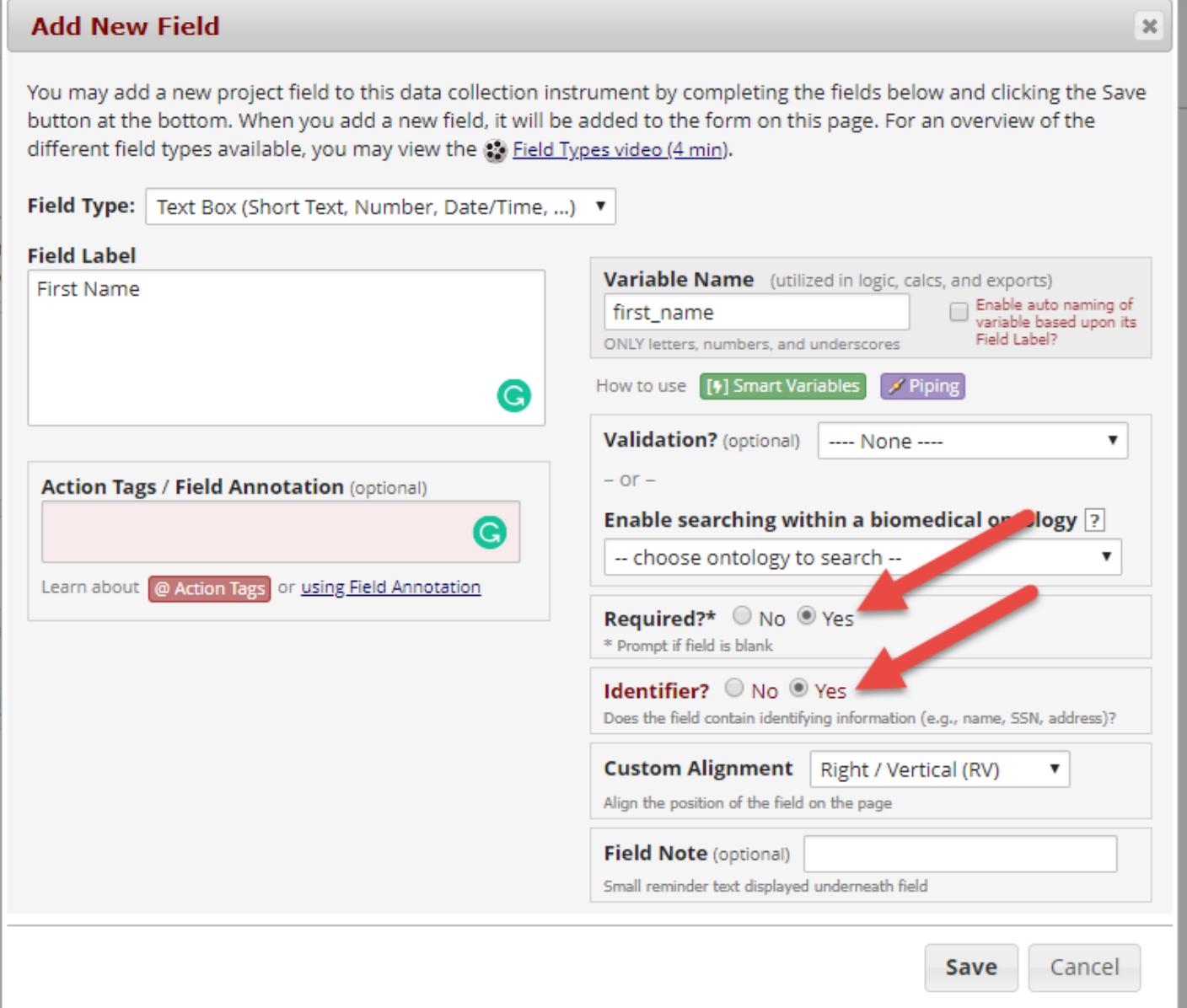
**Identifier?**  Yes  No  
Does the field contain identifying information (e.g., name, SSN, address)?

**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**



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# Step 2: Online Designer

Variable: record\_id  
Record ID

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

Add Field | Add Matrix of Fields | Import from Field Bank

Variable: reg\_date  
Date of registration \* must provide value

Add Field | Add Matrix of Fields | Import from Field Bank

Variable: first\_name  
First name \* must provide value

Add Field | Add Matrix of Fields | Import from Field Bank

Variable: last\_name  
Last name \* must provide value

Add Field | Add Matrix of Fields | Import from Field Bank

Variable: dob  
DOB \* must provide value

Add Field | Add Matrix of Fields | Import from Field Bank

Variable: gender  
Gender \* must provide value

Male  
Female  
Other

reset

Add Field | Add Matrix of Fields | Import from Field Bank

Variable: email  
Email \* must provide value

Add Field | Add Matrix of Fields | Import from Field Bank

Variable: age  
Age at registration

View equation

Add Field | Add Matrix of Fields | Import from Field Bank

	#	Variable / Field Name	Field Label <i>Field Note</i>	Field Attributes (Field Type, Validation, Choices, Calculations, etc.)
Instrument: Demographics (demographics) <span style="float: right;">▲ Collapse</span>				
	1	record_id	Record ID	text
	2	reg_date	Date of registration	text (date_dmy), Required
	3	first_name	First name	text, Required
	4	last_name	Last name	text, Required
	5	dob	DOB	text (date_dmy), Required
	6	gender	Gender	radio, Required
	7	email	Email	text (email), Required
	8	age	Age at registration	calc Calculation: datediff([reg_date], [dob], "y")
	9	demographics_complete	Section Header: Form Status Complete?	dropdown 0 Incomplete 1 Unverified 2 Complete

# Design vs Data Entry

## Design Mode

Variable: record\_id

**Record ID**

NOTE: The field above is the record ID for this form. It is automatically generated. It cannot be changed.

Add Field Add Matrix of Fields Import from Field Bank

Variable: reg\_date

**Date of registration**  
\* must provide value

Add Field Add Matrix of Fields Import from Field Bank

Variable: first\_name

**First name**  
\* must provide value

Add Field Add Matrix of Fields Import from Field Bank

Variable: last\_name

**Last name**  
\* must provide value

Add Field Add Matrix of Fields Import from Field Bank

Variable: dob

**DOB**  
\* must provide value

Add Field Add Matrix of Fields Import from Field Bank

Variable: gender

**Gender**  
\* must provide value

Male  
Female  
Other

Add Field Add Matrix of Fields Import from Field Bank

Variable: email

**Email**  
\* must provide value

Add Field Add Matrix of Fields Import from Field Bank

Variable: age

**Age at registration**

Add Field Add Matrix of Fields Import from Field Bank

## Demographics

Adding new Record ID 2

**Record ID**

2

**Date of registration**

\* must provide value

Variable: reg\_date  
Add Field Add Matrix of Fields Import from Field Bank

**First name**

\* must provide value

Variable: first\_name  
Add Field Add Matrix of Fields Import from Field Bank

**Last name**

\* must provide value

Variable: last\_name  
Add Field Add Matrix of Fields Import from Field Bank

**DOB**

\* must provide value

Variable: dob  
Add Field Add Matrix of Fields Import from Field Bank

**Gender**

\* must provide value

Male  
Female  
Other

reset

**Email**

\* must provide value

Variable: email  
Add Field Add Matrix of Fields Import from Field Bank

**Age at registration**

View equation

**Form Status**

**Complete?**

Incomplete

Save & Exit Form

Save & ...

-- Cancel --

# Data Entry Mode

Monash University  
2021 - Training 01 PID 731

## Record Status Dashboard (all records)

Displayed below is a table listing all existing records/responses and their status for every data collection instrument (and if longitudinal, for every event). You may click any of the colored buttons in the table to open a new tab/window in your browser to view that record on that particular data collection instrument. Please note that if your form-level user privileges are restricted for certain data collection instruments, you will only be able to view those instruments, and if you belong to a Data Access Group, you will only be able to view records that belong to your group.

**Legend for status icons:**

- Incomplete (Incomplete (no data saved) ?)
- Unverified
- Complete

Dashboard displayed: [Default dashboard] [Create custom dashboard](#)

Displaying record Page 1 of 1: "1" through "1" of 1 records ALL (1) records per page

+ Add new record

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

Record ID	Demographics	Diagnosis	My Survey
1	<span style="color: red;">Incomplete</span>	<span style="color: grey;">Incomplete (no data saved)</span>	<span style="color: grey;">Incomplete (no data saved)</span>

Logged in as traininguser01  
[Log out](#)

[My Projects](#)

**Project Home and Design**

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

**Data Collection**

- [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**

- [Project Dashboards](#)
- [Alerts & Notifications](#)
- [Calendar](#)
- [Data Exports, Reports, and Stats](#)
- [Data Import Tool](#)
- [Data Comparison Tool](#)
- [Logging](#)
- [Field Comment Log](#)
- [File Repository](#)

# Calculated Field

Based on Today's date (dynamic)

vs

Based on a fixed date

## Edit Field

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

**Field Type:** Calculated Field



**Field Label**

Age

Use the Rich Text Editor ?

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

age

Enable auto naming of variable based upon its Field Label?

ONLY letters, numbers, and underscores

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

**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

**Calculation Equation** How do I format the equation? Learn how to use [Special Functions](#)

datediff([age], "today", "y")

Valid (The determination of validity may not be 100% accurate in all contexts.)

[Clear calculation](#)

Test calculation with a record: -- select record -- ▾

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

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

Save

Cancel

## Edit Field

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

**Field Type:** Calculated Field

**Field Label**

Age

Use the Rich Text Editor [?](#)



**Calculation Equation** [How do I format the equation?](#) [Learn how to use](#)  [Special Functions](#)

datediff([age], [registration\_date],"y")

 Error in syntax (The determination of validity may not be 100% accurate in all contexts.)

[Clear calculation](#)

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

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

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

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

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

**Required?**\*  No  Yes

\* Prompt if field is blank

**Identifier?**  No  Yes

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

**Custom Alignment**

Align the position of the field on the page

**Field Note** (optional)

Small reminder text displayed underneath field

Save

Cancel

# Breakout Room

Exercise - 12 minutes

Create demographics forms

Age calculation

# Step 2: Edit/Copy/Move/Delete Fields

Variable: first\_name

The screenshot shows a user interface for managing form fields. At the top, there is a toolbar with five icons: a pencil (Edit), a green arrow (Move Up), two overlapping blue files (Copy), a plus sign (Add), and a red X (Delete). The 'Edit' icon is highlighted with a red border. Below the toolbar, the field is labeled 'First name' in bold blue text. To the left of the label, a red asterisk (\*) indicates a required field, followed by the text 'must provide value'. To the right of the label is a large, empty input text box.

First name

\* must provide value

# Improving Form Layout

## Field Embedding

### Demographics

Editing existing Record ID 1 Jones - 18-02-1985

Data Access Group: [No Assignment] ?

Record ID	1	To rename the record, see the record action drop-down at top of the Record Home Page.
First name:	David	<input type="button" value=""/>
Last Name	Jones	<input type="button" value=""/>
Date of Birth	18-02-1985 <input type="button" value="Today"/> <input type="button" value="D-M-Y"/>	<input type="button" value=""/>
Gender	<input type="radio"/> Female <input checked="" type="radio"/> Male <input type="radio"/> Other	<input type="button" value="reset"/>
email address	david.brown@monash.edu	<input type="button" value=""/>
* must provide value		
Form Status		
Complete?	<input type="button" value="Complete"/>	
Lock this instrument?	<input type="checkbox"/> <input type="button" value="Lock"/>	
If locked, no user will be able to modify this instrument for this record until someone with Instrument Level Lock/Unlock privileges unlocks it.		
<input type="button" value="Save &amp; Exit Form"/> <input type="button" value="Save &amp; Stay"/>		<input type="button" value="-- Cancel --"/>
<input type="button" value="Delete data for THIS FORM only"/>		
NOTE: To delete the entire record (all forms/events), see the record action drop-down at top of the Record Home Page. Also, to delete all the data from THIS EVENT only, see the bottom row of the status table on the Record Home Page.		

Editing existing Record ID 1 Jones - 18-02-1985

Event Name: Baseline

Record ID

First Name	Last Name	DOB:
David	Jones	18-02-1985 <input type="button" value="Today"/> <input type="button" value="D-M-Y"/>

Gender  Female  Male  Other

email address  \* must provide value david.brown@monash.edu

Form Status

Complete?

Lock this instrument?

If locked, no user will be able to modify this instrument for this record until someone with Instrument Level Lock/Unlock privileges unlocks it.

NOTE: To delete the entire record (all forms/events), see the record action drop-down at top of the Record Home Page. Also, to delete all the data from THIS EVENT only, see the bottom row of the status table on the Record Home Page.

# Improving Form Layout

## Field Embedding continued

### How to embed a field/s

1. Create the fields on your form eg. first\_name, last\_name, dob, etc
2. Create another field that will contain placeholders for the field/s to be embedded. This is usually 'Descriptive Text' field type
3. Enable the Rich text Editor
4. Create a table structure to suit the field you are collecting. (Consider any field labels you may want)
5. Populate each cell with the variable name to be entered. Note: the variable name must be contained within braces "{}". Eg. {first\_name}

Note; The fields to be embedded must all be on same form.

The screenshot shows the 'Edit Field' dialog box. At the top, it says 'Edit Field' and provides instructions for adding a new project field. It highlights the 'Field Type' dropdown set to 'Descriptive Text (with optional Image/Video/Audio/File Attachment)' and the 'Use the Rich Text Editor' checkbox, both circled in red. Below this is a rich text editor toolbar with various buttons. A table structure is inserted into the editor, containing three columns labeled 'First Name', 'Last Name:', and 'DOB:' with their respective variable names '{first\_name}', '{last\_name}', and '{dob}' placed within them. To the right of the editor, there are sections for 'Variable Name' (demo), 'Optional file attachment, image, audio, or video' (with a 'Embed an external video' section), 'Action Tags / Field Annotation (optional)', and buttons for 'Save' and 'Cancel'.

# Improving Form Layout

## Design Mode

Current instrument: Demographics

Preview instrument

Variable: record\_id  
Record ID

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

Add Field Add Matrix of Fields

Variable: first\_name  
First name:

Add Field Add Matrix of Fields

Variable: last\_name  
Last Name

Add Field Add Matrix of Fields

Variable: dob  
Date of Birth

Add Field Add Matrix of Fields

Variable: demo  
First Name Last Name DOB

{first\_name} {last\_name} {dob}

Add Field Add Matrix of Fields

Variable: gender  
Gender

Female Male Other

Add Field Add Matrix of Fields

Variable: email  
email address

\* must provide value

Add Field Add Matrix of Fields

## Data Entry Mode

### Demographics

Data Access Group: [No Assignment] ?

Editing existing Record ID 1 Jones - 18-02-1985

Event Name: Baseline

1

To rename the record, see the record action drop-down at top of the Record Home Page.

Record ID

First Name	Last Name	DOB:
David	Jones	18-02-1985 <input type="button" value="Today"/> D-M-Y

Gender  Female  Male  Other

email address

Form Status

Complete?

Lock this instrument?  Lock

If locked, no user will be able to modify this instrument for this record until someone with Instrument Level Lock/Unlock privileges unlocks it.

-- Cancel --

Delete data for THIS FORM only

NOTE: To delete the entire record (all forms/events), see the record action drop-down at top of the Record Home Page. Also, to delete all the data from THIS EVENT only, see the bottom row of the status table on the Record Home Page.

# Breakout Room

Exercise - 10 minutes

Field embedding

# Application and Tools 1



# Record Status Dashboard

REDCap™

Logged in as johnl | Log out

My Projects or Control Center

Project Home or Project Setup

REDCap Messenger

Project status: Development

Data Collection [Edit instruments](#)

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

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

Applications

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

Project Bookmarks [Edit](#)

## Record Status Dashboard (all records)

Displayed below is a table listing all existing records/responses and their status for every data collection instrument (and if longitudinal, for every event). You may click any of the colored buttons in the table to open a new tab/window in your browser to view that record on that particular data collection instrument. Please note that if your form-level user privileges are restricted for certain data collection instruments, you will only be able to view those instruments, and if you belong to a Data Access Group, you will only be able to view records that belong to your group.

Legend for status icons:

- Incomplete (Red)
- Incomplete (no data saved) (Grey)
- Unverified (Yellow)
- Complete (Green)

Dashboard displayed: [Default dashboard] ▾ [Create custom dashboard](#)

Displaying Data Access Group: -- ALL -- ▾

Displaying record: Page 1 of 1: "1" through "3" ▾ of 3 records ALL (3) ▾ records per page

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

Record ID	Baseline		Follow-up 3 Months	Follow-up 6 Months
	Demographics	Diagnosis	Simple Questions	Simple Questions
1 (Email john.liiman@monash.edu) John Doe	<span style="color: green;">●</span>	<span style="color: grey;">○</span>	<span style="color: grey;">○</span>	<span style="color: grey;">○</span>
2 (Email christopher.robyn@monash.edu) Christopher Robyn	<span style="color: green;">●</span>	<span style="color: red;">●</span>	<span style="color: grey;">○</span>	<span style="color: grey;">○</span>
3 (Email sumbd@monash.edu) Sum Bar Dee	<span style="color: red;">●</span>	<span style="color: grey;">○</span>	<span style="color: grey;">○</span>	<span style="color: grey;">○</span>

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# Field Data History

<b>DOB</b> * must provide value	<input type="text" value="02-10-1999"/> <input type="button" value="Today"/> D-M-Y
<b>Gender</b> * must provide value	<input type="radio"/> Male <input checked="" type="radio"/> Female
<b>Email</b> * must provide value	<input type="text" value="sum.bar.dee@monash.edu"/>



Data History for variable "email" for record "3"

Listed below is the history of all data entered for the variable "email" for Record ID "3". The data history results are sorted from earliest to most recent.

Date/Time of Change	User	Data Changes Made
02/10/2018 8:19pm	johnl	sumbd@monash.edu
02/10/2018 8:25pm	johnl	sum.bar.dee@monash.edu



# Project Setup – cont.



# Step 2: Branching Logic

Current instrument: **Diagnosis**

[Preview instrument](#)

Add Field   Add Matrix of Fields

Variable: comorb

**Comorbidities**  
\* must provide value

Diabetes  
 Renal Insufficiency  
 Myocardial  
 Other  
 None of the above

Add Field   Add Matrix of Fields

Variable: comorb\_other

If Other, please specify  
\* must provide value

Add Field   Add Matrix of Fields

## 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: **comorb\_other** - *If Other, please specify*

**Advanced Branching Logic Syntax**

How to use  Branching Logic

 Smart Variables

Show the field ONLY if...

[comorb(4)] = '1'

[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)

comorb = Diabetes (1)  
comorb = Renal Insufficiency (2)  
comorb = Myocardial (3)  
comorb = Other (4)  
comorb = None of the above (5)  
diagnosis\_complete = Incomplete (0)  
diagnosis\_complete = Unverified (1)  
diagnosis\_complete = Complete (2)

 **Drag  
and  
Drop**

Show the field ONLY if...

- ALL below are true  
 ANY below are true

comorb = Other (4) 

[Clear logic](#)

# Step 2: Branching Logic

# Action Tags

Add Field Add Matrix of Fields Variable: comorb

**Comorbidities**  
\* must provide value

- Diabetes
- Renal Insufficiency
- Myocardial
- Other
- None of the above

Add Field Add Matrix of Fields

## Edit Field

You may add a new project field to this data collection instrument by completing the fields below and clicking the 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)

**Field Label:** Comorbidities

**Variable Name** (utilized in logic, calcs, and exports)  
comorb  
ONLY letters, numbers, and underscores  
 Enable auto naming variable based upon 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

**Action Tags / Field Annotation** (optional)  
@NONEOFTHEABOVE="5"  
Learn about [@ Action Tags](#) or [using Field Annotation](#)

Save Cancel

# Action Tags (self)

Reports, and Stats  
Tool

Variable: record\_id

Record ID

Edit Field

You may add a new project field to this data collection instance on this page. For an overview of the different field types available, see the Field Types section.

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

Field Label: Gender

Choices (one choice per line) Copy existing choices

1, Male  
0, Female  
99, Other

Action Tags / Field Annotation (optional)

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

What are Action Tags?

[View text on separate page](#)

## @ Action Tags

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. Below is a comprehensive list of all available action tags that you may use. You can use as many as you want for a single field, but if you do use more than one tag for a field, make sure to put a space or line break between them. Because the action tags are used as part of the Field Annotation, they are not displayed anywhere on the page. To start using Action Tags, navigate to the Online Designer in a project, and when adding or editing a field, add the tag into the Action Tag/Field Annotation text box in the Edit Field popup.

All available action tags and their descriptions:

Add	<b>@CALCDATE</b>	Performs a date calculation by adding or subtracting a specified amount of time from a specified date or datetime field and then provides the result as a date or datetime value - e.g., @CALCDATE([visit_date], 7, 'd'). The first parameter inside the @CALCDATE() function should be a text field with date, datetime, or datetime_seconds validation, in which you may specify (if needed) the event and repeating instance - e.g., @CALCDATE([baseline_event][visit_date], 7, 'd'). The second parameter represents the offset number amount that should be added or subtracted. It can be a decimal number or integer. Tip: To subtract (i.e., go backwards in time), use a negative number. The third parameter represents the units of the offset amount, which will be represented by the following options: 'y' (years, 1 year = 365.2425 days), 'M' (months, 1 month = 30.44 days), 'd' (days), 'h' (hours), 'm' (minutes), 's' (seconds). The unit option must be wrapped in quotes or apostrophes. NOTE: Both the source field and the result field must be a text field with date, datetime, or datetime_seconds validation. It is important to realize that a field with @CALCDATE will not be editable on the survey page or data entry form, and the field will function almost exactly like a normal calculated field, in which its value may get updated via a data import, when running Data Quality rule H, or in real-time during normal data entry on a form or survey.
Add	<b>@CALCTEXT</b>	Evaluates logic that is provided inside a @CALCTEXT() function and outputs the result as text, typically performed with an if(x,y,z) function - e.g., @CALCTEXT(if([gender]='1', 'male', 'female')). NOTE: It is important to realize that a field with @CALCTEXT will not be editable on the survey page or data entry form, and the field will function almost exactly like a normal calculated field, in which its value may get updated via a data import, when running Data Quality rule H, or in real-time during normal data entry on a form or survey. If desired, it is possible to return the value as a number - e.g., @CALCTEXT(if([age] >= 18, 'adult', 5*[other_field])). Also, while it is possible to use static text (in quotes), field variables, or Smart Variables as the return values of the IF function - e.g., @CALCTEXT(if([age] >= 18, [dob], [event-label])) - it is NOT possible to pipe field variables or Smart Variables <u>inside quotes</u> for the return values.
Add	<b>@CHARLIMIT</b>	Sets the maximum number of characters that can be entered into a Text field or Notes field, and also displays the number of characters remaining. The format must follow the pattern @CHARLIMIT=??, in which ?? is the desired max character count (alternatively, the number value can be inside single or double quotes). NOTE: This action tag cannot be used at the same time as @WORDLIMIT for the same field. NOTE: This action tag does *not* get applied during any data imports (via API or Data Import Tool) but only operates when viewing survey pages and data entry forms.
		Sets a field's initial value. This allows a field to have a specified default value when viewing the field on a survey or data entry form that has not yet had any data saved for it (i.e., when the form status icon is gray or when a survey page has not had any data entered yet). The format must follow the pattern @DEFAULT="?????", in which the desired default value is placed inside quotes.

# Breakout Room

Exercise - 12 mins

Create diagnosis form

Branching Logic

Action Tags

# Step 2: Data Dictionary: Bulk Edit

 Not started

I'm done!

Design your data collection instruments

Add or edit fields on your data collection instruments. This may be done by either using the Online Designer (online method) or by uploading a Data Dictionary (offline method). Quick links: [Download PDF of all instruments](#) OR [Download the current Data Dictionary](#)

Go to [Online Designer](#) or [Data Dictionary](#) Explore the [REDCap Shared Library](#)

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

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

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

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

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

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

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

**Steps for making project changes:**

- 1.) [Download the current Data Dictionary](#) - Also download with other delimiters: [Comma \(,\)](#), [Tab](#), [Semicolon \(;\)](#)
- 2.) Edit the Data Dictionary (see the [Help & FAQ](#) for help)
- 3.) Upload the Data Dictionary using the form below
- 4.) The changes will be made to the project after the Data Dictionary has been checked for errors

**Upload your Data Dictionary file (CSV file format only)**  
Format for min/max validation values for date and datetime fields: [DD/MM/YYYY or YYYY-MM-DD](#)  
Choose the delimiter for the uploaded file: [Comma \(,\)](#)

No file chosen

“Self study material”

## Use case:

- Numbering all questions
- Moving fields to another form
- Copy a group of fields

# Codebook

Project Home   Project Setup   Other Functionality   Project Revision History

**Quick Tasks**

**Codebook** (Selected)

The Codebook is a human-readable, read-only version of the project's Data Dictionary and serves as a quick reference for viewing field attributes.

**Export data**

Export your data from REDCap to open or view in Excel or various stats packages.

**Create a report**

Build custom reports for quick views of your data, and export reports to Excel/CSV.

**Check data quality**

Build or execute data quality rules to find discrepancies and errors in your project data.

**User Rights**

Grant new users access to this project or modify user privileges for current users.

**Online Designer and Data Dictionary Upload**

Create new fields/questions on your data collection instruments or modify existing ones using the Online Designer or by uploading a Data Dictionary. Quick link: [Download the current Data Dictionary](#).

**Copy this project**

Create an exact duplicate of this project, which copies over all data collection instruments, any surveys that exist, as well as the option to copy all users and reports to the new project.

**Data Access Groups**

Create groups of users to limit user access to certain records/responses, in which only users within a given Data Access Group can access records created by users within that group.

Project is not used as a template Add

# Codebook

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

The Codebook is a human-readable, read-only version of the project's Data Dictionary and serves as a quick reference for viewing the attributes of any given field in the project without having to download and interpret the Data Dictionary. Note: Checkbox fields have their coded values displayed both in the format defined by users in the Online Designer/Data Dictionary as well as in the extended format seen in data imports and exports (i.e., field\_code).

[Print page](#)

## Data Dictionary Codebook

	#	Variable / Field Name	Field Label <i>Field Note</i>	Field Attributes (Field Type, Validation, Choices, Calculations)				
Instrument: <b>Demographics</b> (demographics)								
	1	record_id	Record ID	text				
	2	first_name	First Name	text, Required, Identifier				
	3	last_name	Last Name	text, Required, Identifier				
	4	dob	DOB	text (date_dmy), Required, Identifier				
	5	gender	Gender	radio, Required, Identifier <table border="1"><tr><td>1</td><td>Male</td></tr><tr><td>0</td><td>Female</td></tr></table>	1	Male	0	Female
1	Male							
0	Female							
	6	email	Email	text (email), Required, Identifier				

# Longitudinal Study: Define Events

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

Project status:  Development

Completed steps 0 of 7



Not  
started

## Main project settings

[Enable](#) Use surveys in this project? [?](#)[VIDEO: How to create and manage a survey](#)[Enable](#) Use longitudinal data collection with defined events? [?](#)[I'm done!](#)[Modify project title, purpose, etc.](#)

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# Longitudinal Study: Define Events

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

Project status:  Development

Completed steps 2 of 8

 **Main project settings**

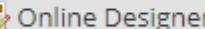
Enable  Use surveys in this project? [?](#)  [VIDEO: How to create and manage a survey](#)

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

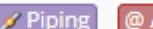
[Not complete?](#) [Modify project title, purpose, etc.](#)

 **Design your data collection instruments**

Add or edit fields on your data collection instruments. This may be done by either using the Online Designer (online method) or by uploading a Data Dictionary (offline method). Quick links: [Download PDF of all instruments](#) OR [Download the current Data Dictionary](#).

Go to  [Online Designer](#) or  [Data Dictionary](#) Explore the  [REDCap Shared Library](#)

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

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

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

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

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

[I'm done!](#)

# Longitudinal Study: Define Events

Project Setup

Define My Events

Designate Instruments for My Events

This application allows you to define 'events' for your project that allow for the **utilization of data collection forms multiple times for any given project record** (often used when collecting longitudinal data). An 'event' may be a temporal event in the course of your project, such as a participant visit or a task to be performed. After events have been defined, you will need to designate the data collection instruments that you wish to utilize for any or all events, thus allowing you to use a form for multiple events for the same project record. You may **group your events into 'arms'**, in which you may have one or more arms/groups for your project. Each arm can have as many events as you wish. You may use the table below to create new events and/or arms, or modify existing ones. (One arm and one event will be initially defined as the default for all projects.)

## STEP #1:

To add new events below, provide an **Event Name** for that event, and then click the *Add new event*. Once events have been added, you can easily change their order by dragging and dropping the event using the up-down arrow icon on the far left for a given row in the table.

## STEP #2:

Once you have defined your events on this page, you may navigate to the [Designate Instruments for My Events](#) page, where you may select which data collection instruments that you wish to utilize for each event you defined.

 Upload or download arms/events ▾

Arm 1: Arm 1

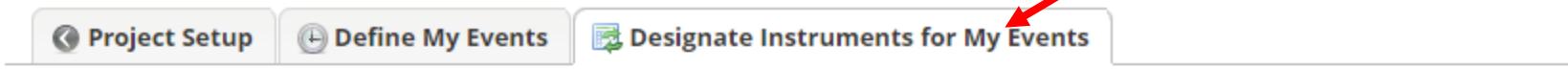
+Add New Arm

Arm name: **Arm 1**

[Rename Arm 1](#)

	Event #	Event Name	Custom Event Label  (optional)	Unique event name  (auto-generated)
 	1	Baseline		baseline_arm_1
 	2	Follow-up 3 Months		followup_3_months_arm_1
 	3	Follow-up 6 Months		followup_6_months_arm_1

# Longitudinal Study: Define Events



Since you have defined multiple events on the [Define My Events](#) page, you may now select which data collection instruments that you wish to utilize for each event by using the table below. This allows you to enter data on any data collection form multiple times for any given project record. Any and all data collection instruments can thus be used for any event defined.

Click the *Begin Editing* button to change the relationships below by designating which forms you wish to utilize for which events. When you are finished making changes, click the *Save* button to finalize your changes.

[Upload or download instrument mappings](#)

[Begin Editing](#) [Save](#)      [Select All](#) | [Deselect All](#)

Data Collection Instrument	Baseline (1)	Follow-up 3 Months (2)	Follow-up 6 Months (3)
Demographics	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Diagnosis	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Simple Questions	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

# Break Time – 10 mins



# Enable Optional Modules/Customisations

Optional

I'm done!

## Enable optional modules and customizations

<input type="button" value="Enable"/>	<input checked="" type="radio"/> Repeatable instruments <a href="#">?</a>
<input type="button" value="Disable"/>	<input checked="" type="checkbox"/> Auto-numbering for records <a href="#">?</a>
<input type="button" value="Enable"/>	<input checked="" type="radio"/> Scheduling module (longitudinal only) <a href="#">?</a>
<input type="button" value="Enable"/>	<input checked="" type="radio"/> Randomization module <a href="#">?</a>
<input type="button" value="Enable"/>	<input checked="" type="radio"/> Designate an email field for communications (including survey invitations and alerts) <a href="#">?</a>

[Additional customizations](#)



# Auto Numbering vs Self Numbering

## 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 Add new record 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.

## Auto Numbering Mode

Choose an existing Record ID	-- select record --
	+ Add new record

Data Search	
Choose a field to search (excludes multiple choice fields)	All fields
Search query	Begin typing to search the project data, then click an item in the list to navigate to that record.

## 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, type the record name in the text box below and hit Tab or Enter. To quickly find a record without using the drop-downs, the text box will suggest existing record names as you begin to type in it, allowing you to select it.

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

## Self Numbering

Total records: 1
Choose an existing Record ID
Enter a new or existing Record ID

Data Search	
Choose a field to search (excludes multiple choice fields)	All fields
Search query	Begin typing to search the project data, then click an item in the list to navigate to that record.

# Enable Optional Modules/Customisations

Optional

I'm done!

### Enable optional modules and customizations

- Enable  Repeatable instruments [?](#)
- Enable  Auto-numbering for records [?](#)
- Enable  Scheduling module (longitudinal only) [?](#)
- Enable  Randomization module [?](#)
- Enable  Designate an email field for communications (including survey invitations and alerts) [?](#)

Additional customizations

# Step 4: Enable optional Modules/Customisations

**Additional customizations**

You may use the options below to make customizations to the project. When done, click Save to save your changes.

**Set a Custom Record Label**  
You may append other data and/or static text to any record name (e.g., Study ID) as the record is displayed on your data collection instruments, such as inside the drop-down lists when choosing a record and at the top of the page after being selected. Simply provide the text you wish to display below, and place any variable names inside square brackets [ ] which the data collected for those variables for that record will replace the variable in the text.

Custom Record Label:

Example: if ([last\_name], [first\_name]) were entered, then for record '102' it would display '102 (Doe, Jon)'.

**Designate a Secondary Unique Field**  
You may designate a text field to serve as a unique constraint whose value cannot be duplicated or shared by any other record in the project. When a value is entered or imported for the secondary unique field, it will be checked in real time to ensure it is not shared by another record, and if so, it will ask the user to enter another value. Additional options exist below that dictate if and how the secondary unique field will be displayed in conjunction to a record name on various pages in the project.

-- select field --

Display the value of the Secondary Unique Field next to each record name displayed?

Display the field label of the Secondary Unique Field when displaying the value?

**Order the records by another field**  
The default setup is that all records are ordered by their record name (e.g., Study ID) when displayed in the drop-down lists on your data collection instruments, but you may alternatively order the drop-down lists by the values of another field in the project (e.g., last name), if desired. If you wish to order the records by another field, select the field below.

-- select field to order records by --

**Enable the Field Comment Log or Data Resolution Workflow (Data Queries)?**  
For this project, you may enable either the Field Comment Log or Data Resolution Workflow (also known as the Data Queries module). The Field Comment Log (enabled by default) allows users to leave comments for any given field on a data entry form by clicking the balloon icon next to the field. All comments can also be viewed, searched, and downloaded on the Field Comment Log page. Alternatively, if the Data Resolution Workflow is enabled, users will be allowed to open a workflow for documenting the process of resolution for the field in the event a comment is submitted that requires further action.

Record ID 1	Follow-up 3 Months	Follow-up 6 Months
a Collection Instrument	Baseline	
graphics		
sis		
Questions		
data on event:		

**Record Home Page**  
The grid below displays the run-by-form progress of data entered for the currently selected record. You may click on the colored status icons to view details that form/event.

Choose action for record

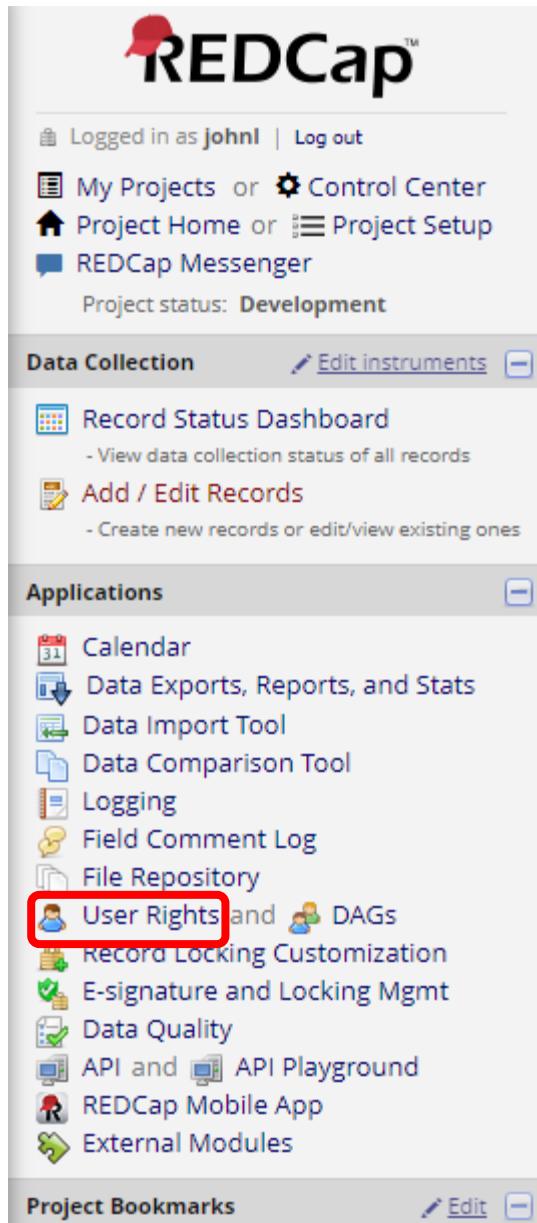
Data Collection Instrument	Status
Demographics	●
Diagnosis	○
Mv Survey	○

# Breakout Room

Exercise - 6 mins

- Auto-numbering vs Self numbering
- Customise label

# User Rights and Permissions



REDCap

Logged in as johnl | Log out

My Projects or Control Center

Project Home or Project Setup

REDCap Messenger

Project status: Development

Data Collection Edit instruments

Record Status Dashboard

- View data collection status of all records

Add / Edit Records

- Create new records or edit/view existing ones

Applications

Calendar

Data Exports, Reports, and Stats

Data Import Tool

Data Comparison Tool

Logging

Field Comment Log

File Repository

User Rights and DAGs

Record Locking Customization

E-signature and Locking Mgmt

Data Quality

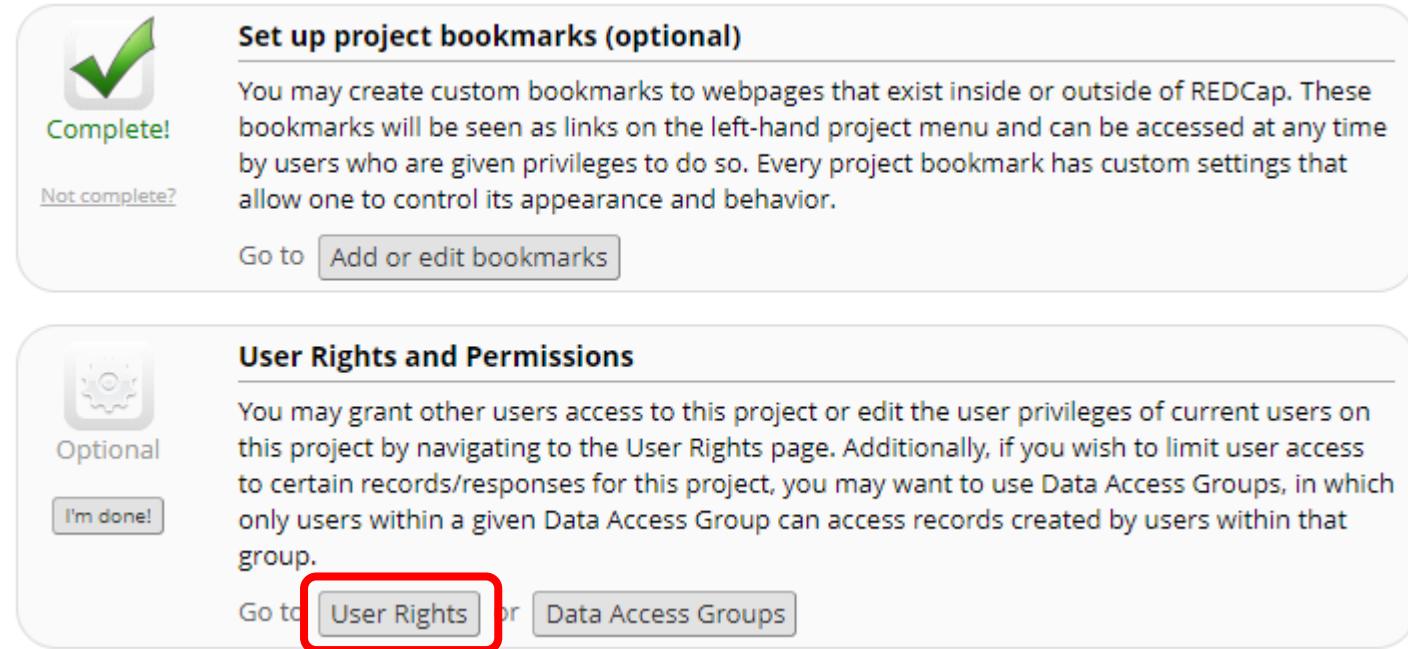
API and API Playground

REDCap Mobile App

External Modules

Project Bookmarks Edit

OR



Set up project bookmarks (optional)

Complete! Not complete?

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

Go to Add or edit bookmarks

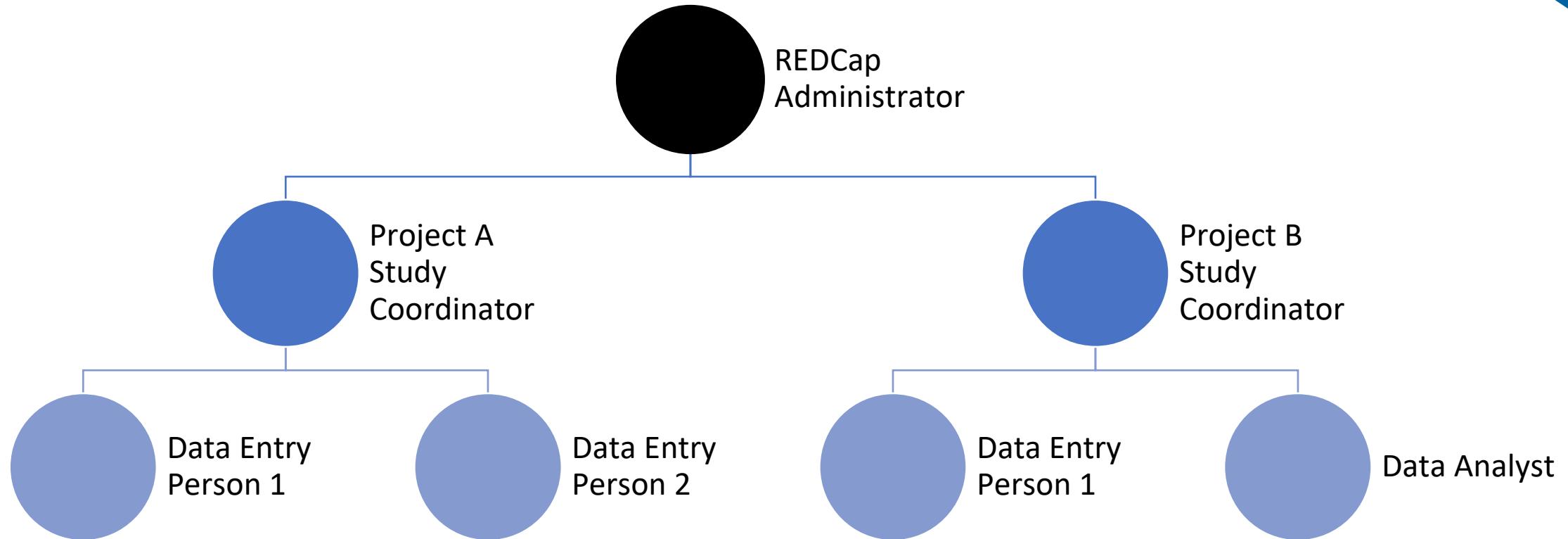
User Rights and Permissions

Optional I'm done!

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

Go to User Rights or Data Access Groups

# Understanding Your Role



# User Role

[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.

 [Add new user](#) [Add with custom rights](#)

— OR —

 [Assign new user](#) [Assign to role ▾](#)

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

 [Enter new role name](#) [Create role](#)

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



Role name (click role name to edit role)	Username or users assigned to a role (click username to edit or assign to role)	Expiration (click expiration to edit)	Project Design and Setup	User Rights	Data Access Groups	Data Export Tool	Reports & Report Builder	Graphical Data View & Stats
—	johnl (John Liman)	never	✓	✓	✓	Full Data Set	✓	✓
<b>Data Collector</b>	[No users assigned]		✗	✗	✗	✗	✓	✓
<b>Project Manager</b>	[No users assigned]		✓	✓	✓	Full Data Set	✓	✓

Logged in as traininguser01

[Log out](#)[My Projects](#)

## Project Home and Design

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

## Data Collection

- [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

- [Project Dashboards](#)
- [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](#)
- [External Modules](#)

## Reports

- [Search](#)
  - [Organize](#)
  - [Edit](#)
- 1) Demographics

## Help &amp; Information

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

[Contact REDCap administrator](#)

## 2021 - Training 01

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

This page may be used for granting roles to which you may assign rights. It will allow you to easily add many users to a role, and to categorize users within a project to make modifications to any element.

**Add new users:** Give them access[Add new user](#)

— OR —

[Assign new user](#)**Create new roles:** Add new[Secret](#)

(e.g., Project Manager, Data Analyst)

**Role name**

(click role name to edit role)

**Study Coordinator**

(click role name to edit role)

## Creating new role "Secret"

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

## Creating new role "Secret"

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



## Other privileges:

 Calendar Data Import Tool Data Comparison Tool Logging File Repository Data Quality[What is Data Quality?](#) API[What is the REDCap API?](#)

## Settings pertaining to project records:

 Create Records

## Data Viewing Rights

The data viewing 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). If a user has 'No Access' to an instrument below, they will not be able to view the data entry form for any record, nor will they be able to view fields from that instrument on a report. Note: This privilege has no effect on data imports or data exports.

	No Access (Hidden)	Read Only	View & Edit
Demographics	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Diagnosis	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
My Survey	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

## External Modules: Configuration Permissions

Privileges may be defined regarding whether the user can set or modify the configuration of an External Module that has been enabled on this project. Below are the currently enabled modules. NOTE: Only administrators may modify the module configuration permissions here.

 Instance Marker\*\*

\*\*Module does not have project-level configuration options

# Refer to the Help & FAQ for the definitions of each access

# User Role

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.

←

**Bad practice: Assign user without a role**

**Best practice: Always create role and assign user to the role**

Role name (click role name to edit role)	Username or users assigned to a role (click username to edit or assign to role)	Expiration (click expiration to edit)	Project Design and Setup	User Rights	Data Access Groups	Data Export Tool	Reports & Report Builder	Graphical Data View & Stats
—	johnl (John Liman)	never	✓	✓	✓	Full Data Set	✓	✓
Data Collector	[No users assigned]		✗	✗	✗	✗	✓	✓
Project Manager	[No users assigned]		✓	✓	✓	Full Data Set	✓	✓

# Assign User to Role

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

— OR —

n.hay 

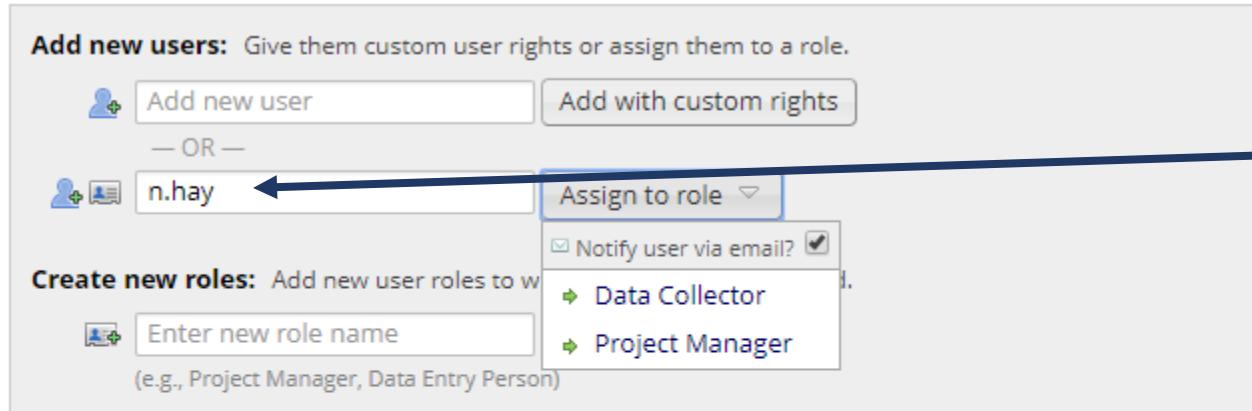
Assign to role 

Notify user via email?

- Data Collector
- Project Manager

Create new roles: Add new user roles to w

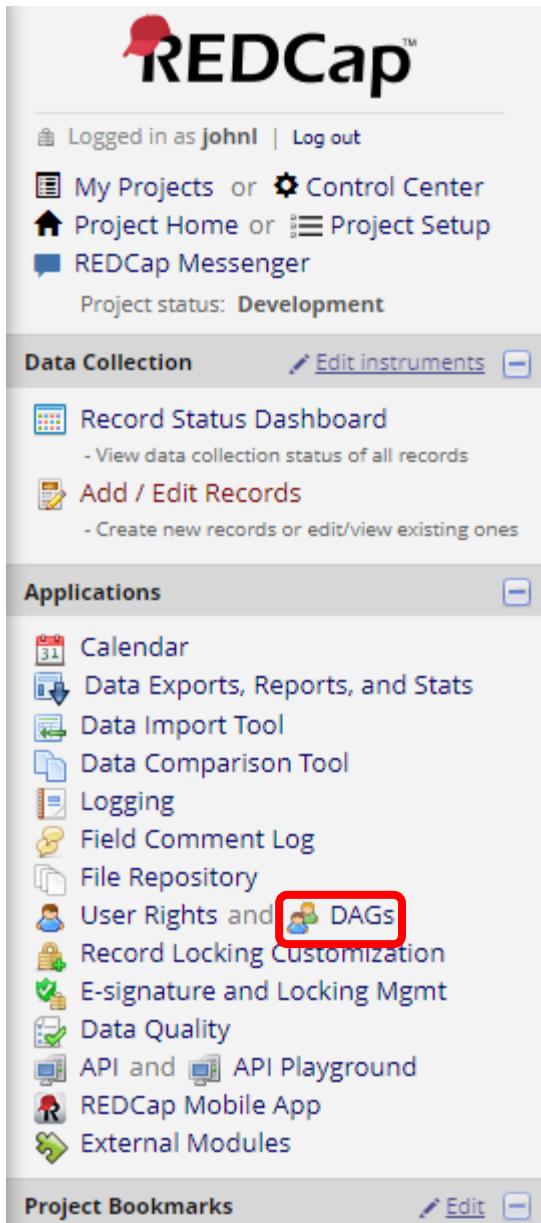
Enter new role name  
(e.g., Project Manager, Data Entry Person)



User must exist – if not exist raise a request at <https://redcap.link/monashredcapaccount>

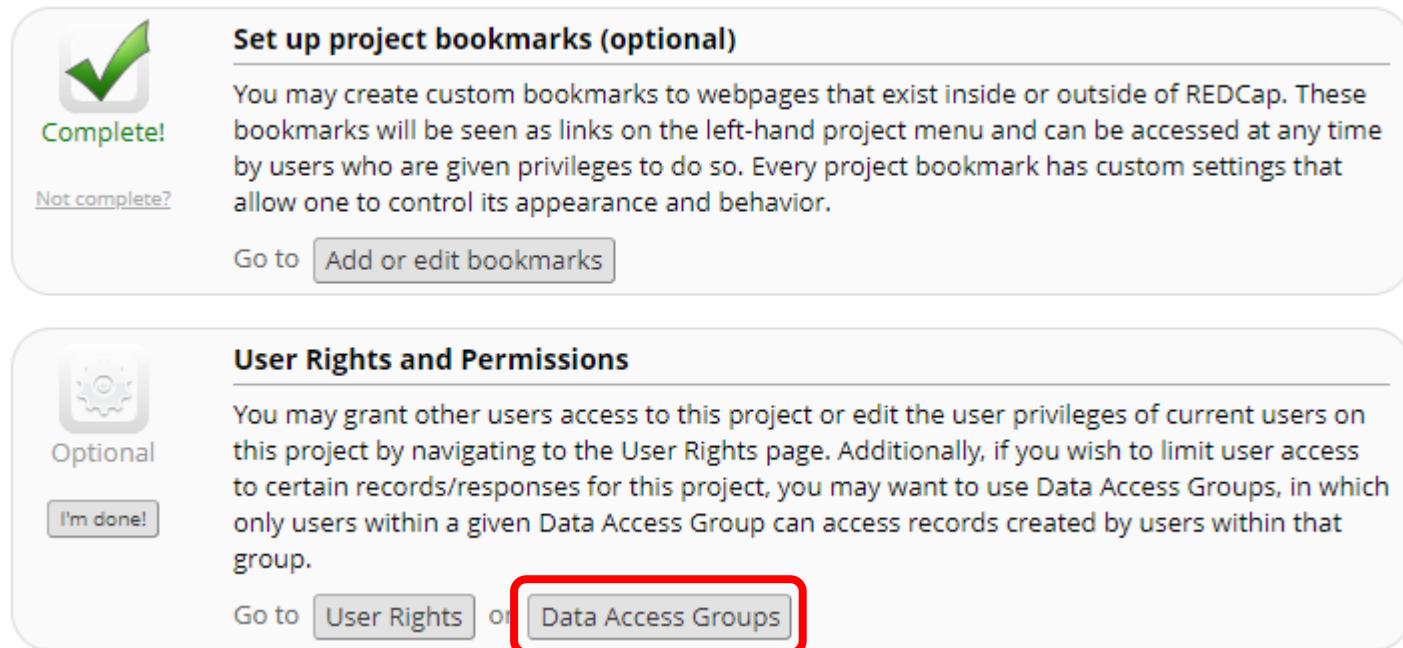
Role name (click role name to edit role)	Username or users assigned to a role (click username to edit or assign to role)	Expiration (click expiration to edit)	Project Design and Setup	User Rights	Data Access Groups	Data Export Tool	Report Bui
—	johnl (John Liman)	never	✓	✓	✓	Full Data Set	✓
Data Collector	[No users assigned]		✗	✗	✗	✗	✓
Project Manager	[No users assigned]		✓	✓	✓	Full Data Set	✓

# Data Access Groups



The screenshot shows the REDCap project menu. At the top, it says "Logged in as johnl | Log out". Below that are links for "My Projects", "Control Center", "Project Home", "Project Setup", and "REDCap Messenger". It also displays "Project status: Development". Under "Data Collection", there are links for "Record Status Dashboard" and "Add / Edit Records". In the "Applications" section, there are many items listed, including "Calendar", "Data Exports, Reports, and Stats", "Data Import Tool", "Data Comparison Tool", "Logging", "Field Comment Log", "File Repository", "User Rights and DAGs" (which is highlighted with a red box), "Record Locking Customization", "E-signature and Locking Mgmt", "Data Quality", "API and API Playground", "REDCap Mobile App", and "External Modules". At the bottom, there are "Project Bookmarks" and "Edit" buttons.

OR



The screenshot shows the REDCap setup wizard. It starts with a "Complete!" button and a "Not complete?" link. The main section is titled "Set up project bookmarks (optional)". It explains that users can create custom bookmarks to webpages inside or outside of REDCap, which will appear in the project menu. It includes a "Go to Add or edit bookmarks" link. Below this is another section titled "User Rights and Permissions". It explains that users can grant access to the project or edit user privileges. It mentions Data Access Groups as a way to limit access to certain records. It includes a "Go to User Rights" and "Data Access Groups" link, where "Data Access Groups" is highlighted with a red box.

# Data Access Group

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

 [VIDEO: How to use Data Access Groups](#)

Access to certain project records may be limited by using Data Access Groups, in which only users within a given Data Access Group can access records created by users within that group. This may be useful in the case of a multi-site or multi-group project that requires that groups not be able to access another group's data.

Below you can create Data Access Groups for this project and afterward assign any current user to that group. You may delete the group at any time, if you wish. To rename an existing Data Access Group, simply click the group name in the table below and type the new name. You may assign a user to a Data Access Group by selecting the username and group name below and then clicking the 'Assign' button. Once assigned to a Data Access Group, the user will be able to see ONLY the project records created by themselves and others in that group. This includes being able to view records on data entry forms, in reports, and in exported data sets. Users can be un-assigned from a group by selecting the user name and selecting 'No Assignment'.

**Create new groups:** Add new data access groups to which users may be assigned.

  [Add Group](#)

**Assign user to a group:** Users may be assigned to any data access group.

 [Assign user](#) [-- Select User -- ▾](#) to [\[No Assignment\] ▾](#) [Assign](#)

Data Access Groups	Users in group	Number of records in group	Unique group name <small>(auto-generated)</small>	Group ID number <small>(auto-generated)</small>	Delete group?
Alfred Hospital		0	alfred_hospital	1	
Cabrini Hospital		0	cabrini_hospital	2	
Royal Melbourne Hospital		0	royal_melbourne_ho	3	
St Vincent Hospital		0	st_vincent_hospita	4	
[Not assigned to a group]	johnl (John Liman) * Can view ALL records	1			

# Breakout Room

Exercise 10 mins

- Create Roles
- Assign user
- Create DAG
- Assign user to the DAG

# Test Your Project!!



Complete!

[Not complete?](#)

## Test your project thoroughly

It is important to test the essential components of your project before moving it into production. Try creating a few test records and entering some data for each to ensure that your data collection instruments look and behave how you expect, especially branching logic and calculations. Then review your test data by creating reports and exporting your data to view in Excel or a statistical analysis package. If you have surveys, complete the surveys as if you were a participant by using the Public Survey Link or Participant List by sending a survey invitation to yourself. If other project modules will be used regularly, test them out a bit too. The best way to test your project is to use it as if you were entering real production data, and it is always helpful to have colleagues (especially team members) take a look at your project to get a fresh set of eyes looking at it.

# Step 8: Move to Production



Not started

## Move your project to production status

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

Go to [Move project to production](#)

### Move Project To Production Status?



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](#)



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# Application and Tools 2



# Project Log/Audit Trail

**REDCap™**

Logged in as **johnl** | Log out

**My Projects** or **Control Center**

**Project Home** or **Project Setup**

**REDCap Messenger**

Project status: Development

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

- Record Status Dashboard**  
- View data collection status of all records
- Add / Edit Records**  
- Create new records or edit/view existing ones

**Applications**

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

**Project Bookmarks** [Edit](#)

## Logging

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

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

Filter by event: All event types (excluding page views) ▾

Filter by user name: All users ▾

Filter by record: All records ▾

Filter by records in a DAG: ▾

Filter by time range from  31 to  31

Displaying events (by most recent): 1 - 43 (Page 1 of 1) ▾

Time / Date	Username	Action	List of Data Changes OR Fields Exported
02/10/2018 8:19pm	johnl	Created Record 3 (Baseline)	first_name = 'Sum Bar', last_name = 'Dee', dob = '1999-10-02', gender = '0', email = 'sumbd@monash.edu', demographics_complete = '0', record_id = '3'
02/10/2018 8:18pm	johnl	Updated Record 2 (Baseline)	comorb(1) = checked, diagnosis_complete = '0'
02/10/2018 8:18pm	johnl	Created Record 2 (Baseline)	first_name = 'Christopher', last_name = 'Robyn', dob = '2018-10-02', gender = '1', email = 'christopher.robyn@monash.edu',



# Data Exports

**REDCap™**

Logged in as johnl | Log out

My Projects or Control Center

Project Home or Project Setup

REDCap Messenger

Project status: Development

Data Collection [Edit instruments](#)

- Record Status Dashboard - View data collection status of all records
- Add / Edit Records - Create new records or edit/view existing ones

Applications

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

Project Bookmarks [Edit](#)

## 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)	<a href="#">View Report</a> <a href="#">Export Data</a> <a href="#">Stats &amp; Charts</a>		
B	Selected instruments and/or events (all records)	<a href="#">Make custom selections</a>		
	<a href="#">+ Create New Report</a>			

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# Reports



# Create New Reports

## Data Exports, Reports, and Stats

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

 [Create New Report](#)

 [My Reports & Exports](#)

 [Other Export Options](#)

You may create a new report by selecting the fields/variables below 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.

Name of Report:

Ready for Follow-Up

### STEP 1

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

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

### STEP 2

 **Fields to include in report**

 [Quick Add](#)

Add all fields from selected instrument:

-- choose instrument -- ▾

Field 1	record_id "Record ID"	▼	 ABX	Instrument: Demographics	
Field 2	first_name "First Name"	▼	 ABX	Instrument: Demographics	
Field 3	last_name "Last Name"	▼	 ABX	Instrument: Demographics	
Field 4	dob "DOB"	▼	 ABX	Instrument: Demographics	



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# Create New Reports

## STEP 3

Show data for all events for each record returned [?](#) [How to use filters and AND/OR logic](#)

### Filters (optional)

#### Operator / Value

##### Filter 1

demographics\_complete "Complete?" [RBX](#)

= Complete



AND

##### Filter 2

-- select a field -- [RBX](#)

[?](#) [RBX](#)

### Live Filters (optional)

Live Filters can be selected on the report page for dynamically filtering data in real time. Only multiple choice fields can be used as Live Filters (as well as Events, if longitudinal, and Data Access Groups, if any exist).

#### Live Filter 1

[Data Access Groups] [RBX](#)

#### Live Filter 2

-- select a field -- [RBX](#)

#### Live Filter 3

-- select a field -- [RBX](#)

## STEP 4

### Order the Results (optional)

#### First by

record\_id "Record ID" [RBX](#)

Ascending order [RBX](#)

#### Then by

Type variable name or field label [RBX](#)

Ascending order [RBX](#)

#### Then by

Type variable name or field label [RBX](#)

Ascending order [RBX](#)

Save Report

Cancel

# Create New Reports

Project status: Development

Data Collection [Edit Instruments](#)

- [Record Status Dashboard](#)  
- View data collection status of all records
- [Add / Edit Records](#)  
- Create new records or edit/view existing ones

Applications

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

Project Bookmarks [Edit](#)

- [Another REDCap project](#)

Reports [Edit reports](#)

- [Ready for Follow-Up](#)

Help & Information [Edit](#)

- [Help & FAQ](#)

**Data Exports, Reports, and Stats**

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

[Create New Report](#) [My Reports & Exports](#) [Other Export Options](#) [View Report: Ready for Follow-Up](#)

**Number of results returned: 2**  
Total number of records queried: 3  
('records' = total available data across all designated events)

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

Live filters: [ Data Access Group ] ▾

**Ready for Follow-Up**

Record ID record_id	Event Name redcap_event_name	Data Access Group redcap_data_access_group	First Name first_name	Last Name last_name	DOB dob	Gender gender	Email email
1 (Email john.liman@monash.edu) John Doe	Baseline		John	Doe	02-10-1989	Male (1)	john.liman@monash.edu
2 (Email christopher.robyn@monash.edu) Christopher Robyn	Baseline		Christopher	Robyn	02-10-2018	Male (1)	christopher.robyn@monash.edu

# Breakout Room

10 mins

Reports

# Help and Resources





You are here

Repeating Instruments/Events

Randomisation

SMS

Mobile App

MyCap

External Modules

API



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[Log In](#)

<https://redcap.helix.monash.edu/index.php?action=training>

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

[Forgot your password?](#)

## REDCap Training Videos

### Just Getting Started?

Explore these overviews of fundamental concepts and features.

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

### Building a Project

Learn how to build and modify data collection instruments.

Title	Description	Watch Video
<a href="#">Introduction to</a>	An introduction to the Online Designer and Data Dictionary methods of instrument	

# Help Resources

The screenshot shows the REDCap Project Home and Design interface. At the top, it says "Logged in as jliman | Log out". Below that are links for "My Projects" and "REDCap Messenger" (with a red exclamation mark). The main menu includes "Project Home and Design", "Data Collection — Royal Prince Alfred Hospital", and "Applications". Under "Reports", there are two items: "Incomplete Transfer Worklist" and "Completed but ACFDR ID is not entered". The "Help & Information" section at the bottom contains three links: "Help & FAQ", "Video Tutorials", and "Suggest a New Feature". Two red arrows point from the text "Help Resources" in the previous slide to the "Help & FAQ" and "Video Tutorials" links.

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

The screenshot shows the REDCap group page on the Workplace platform. The header features a large, stylized red baseball cap icon above the word "REDCap" in white, bold letters. Below it, the text "Research Electronic Data Capture" is visible. On the left, a sidebar shows "REDCap" and "Open Group". The top right has buttons for "Joined", "Share", "Notifications", and "More". The main navigation bar includes "About", "Discussion" (which is underlined), "Members", "Files", "Events", "Photos", and "More". A search bar says "Search this group". Below the bar are buttons for "Write Post", "Add File", "Create Doc", and "More". A text input field says "Write something...". A "Google Drive" button is also present. On the right, there's a "ADD MEMBERS" section with a text input and an "Import" link, and a "SHARE AN INVITATION LINK" section with a URL input and a "+" button. The "MEMBERS" section shows 17 members with their profile pictures and initials: N, J, D.

# REDCap Group @Workplace

# Feedback and Questions



<https://docs.google.com/forms/d/e/1FAIpQLSdVzEUewlu78zK6KZFlyCFLP2y6ETz5tDfvZILLQ514fKPPUw/viewform>

**Study data was collected and managed using REDCap electronic data capture tools hosted and managed by Helix (Monash University).**

**<sup>1</sup>REDCap (Research Electronic Data Capture) is a secure, web-based application designed to support data capture for research studies, providing 1) an intuitive interface for validated data entry; 2) audit trails for tracking data manipulation and export procedures; 3) automated export procedures for seamless data downloads to common statistical packages; and 4) procedures for importing data from external sources.**

**<sup>1</sup>*Paul A. Harris, Robert Taylor, Robert Thielke, Jonathon Payne, Nathaniel Gonzalez, Jose G. Conde, Research electronic data capture (REDCap) - A metadata-driven methodology and workflow process for providing translational research informatics support, J Biomed Inform. 2009 Apr;42(2):377-81.***