



Introduction to REDCap™

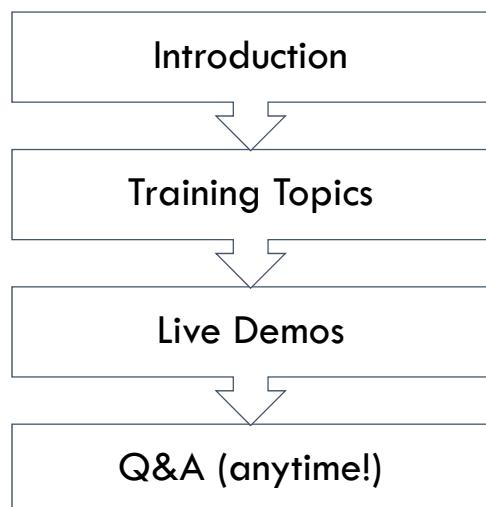
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Helix



AGENDA



REDCap Introduction



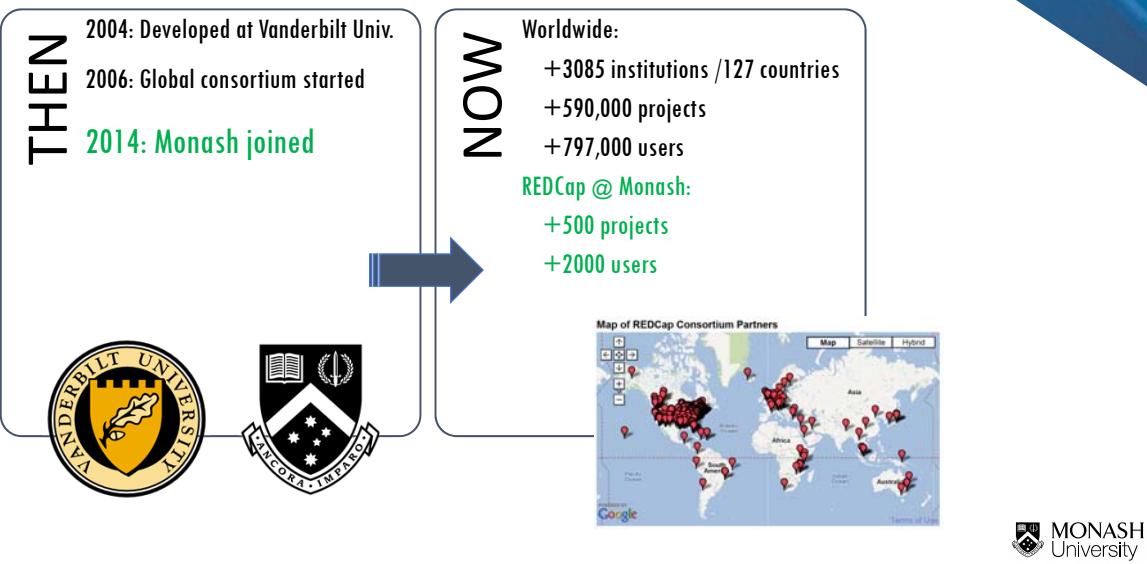
REDCap DEMO

Training Registration

- Go to the website and sign-in
<https://is.gd/monashredcaptraining>



Who Created REDCap and Who Uses it?



What is REDCap?

Web-based software used to create and manage research databases and/or participant surveys.

Developed as a tool to help researchers collect and manage data effectively and responsibly.

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

- includes user group, training, design guidance, troubleshooting



Training Topics

Project Setup

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

Using Surveys

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



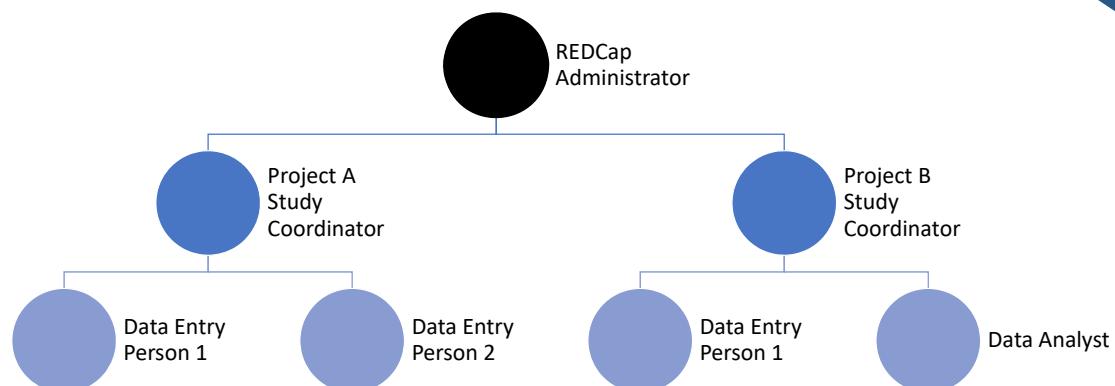
Training Topics

Applications & Tools

- Record status dashboard
- Project audit trail
- Field history
- Codebook
- Data export
- Data import
- Data quality



REDCap Users



REDCap Project Request

Monash University Research

The P.I. must be from Monash University

<https://is.gd/monashredcap>

Monash Health Translation Precinct (MHTP) Research

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

<https://is.gd/mhtpredcap>



Project Setup



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



[Log In](#)

This is a test 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 [Helix Team](#).

| | |
|-----------|--------------------------|
| Username: | <input type="text"/> |
| Password: | <input type="password"/> |

[Log In](#)

[Forgot your password?](#)



My Projects



[Home](#) [My Projects](#) [Help & FAQ](#) [Training Videos](#) [Messenger](#)

Logged in as
traininguser1 [My Profile](#) [Log out](#)

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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

REDCap Home My Projects Help & FAQ Training Videos Messenger Logged in as **traininguser1** My Profile Log out

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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](#).

| Project Title | Records | Fields | Instrument | Type | Status |
|----------------------------------|---------|--------|---------------------|------|--------|
| Training Project 1 | 0 | 5 | 3 forms | | |
| 01 - Instructor Training Project | 3 | 12 | 1 form 2 surveys | | |

REDCap 8.10.15 - © 2019 Vanderbilt University

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Step 1: Main Project Settings

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.

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Step 1: Main Project Settings

Project Home Project Setup Other Functionality Project Revision History

Project status: Development Completed steps 1 of 8

Main project settings

Complete!

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

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

[Not complete?](#)

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

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Step 2: Online Designer

Project Home Project Setup Other Functionality Project Revision History

Project status: Development Completed steps 1 of 8

Main project settings

Complete!

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

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](#).

Not started

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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Step 2: 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. NOTE: While in development status, all field changes will take effect immediately in real time.

| Instrument name | Fields | View PDF | Instrument actions |
|---------------------|--------|----------|--------------------|
| My First Instrument | 1 | | |

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Step 2: 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. NOTE: While in development status, all field changes will take effect immediately in real time.

| Instrument name | Fields | View PDF | Instrument actions |
|------------------|--------|----------|--------------------|
| Demographics | 1 | | |
| Diagnosis | 0 | | |
| Simple Questions | 0 | | |

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Step 2: Online Designer

The screenshot shows the 'Add New Field' dialog box overlaid on the main designer interface. The dialog box contains 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), and Begin New Section (with optional text). A red arrow points to the 'Add New Field' button at the top of the dialog box.



Step 2: Online Designer

The screenshot shows the 'Add New Field' dialog box with several fields highlighted by red arrows:

- Field Type:** Text Box (Short Text, Number, Date/Time, ...) (highlighted)
- Field Label:** First Name (highlighted)
- Variable Name:** first_name (highlighted)
- Action Tags / Field Annotation (optional):** (highlighted)
- Validation? (optional):** ---- None ---- (highlighted)
- Required?***: Yes (highlighted)
- Identifier?***: Yes (highlighted)

A red arrow also points to the 'Save' and 'Cancel' buttons at the bottom right of the dialog box.



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

Variable: first_name

First Name

* must provide value

Add Field Add Matrix of Fields

Variable: last_name

Last Name

* must provide value

Add Field Add Matrix of Fields

Variable: dob

DOB

* must provide value

Today D-M-Y

Add Field Add Matrix of Fields

Variable: gender

Gender

Male Female

reset

Add Field Add Matrix of Fields

Variable: email

Email

* must provide value

Add Field Add Matrix of Fields



Step 2: Edit/Copy/Move/Delete Fields

Variable: first_name

First Name

* must provide value



Step 2: Branching Logic

Current instrument: **Diagnosis**

[Preview instrument](#)

The screenshot shows the 'Diagnosis' instrument interface. At the top, there are buttons for 'Add Field' and 'Add Matrix of Fields'. Below this, a section titled 'Comorbidities' contains a note '* must provide value'. It lists several options with checkboxes: Diabetes, Renal Insufficiency, Myocardial, Other, and None of the above. Below this is another section with a red box around the 'Drag and Drop' icon. It contains a note 'If Other, please specify' and a note '* must provide value'. A text input field is present for specifying other conditions.

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The screenshot shows the 'Add/Edit Branching Logic' dialog box. It explains that branching logic is used to hide fields under certain conditions. It offers two methods: 'Advanced Branching Logic Syntax' and 'Drag-N-Drop Logic Builder'. A red arrow points from the text 'Branching Logic' in the 'Advanced Branching Logic Syntax' section to the 'Drag-N-Drop Logic Builder' section. The 'Drag-N-Drop Logic Builder' section shows a list of field choices from other fields: 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), and diagnosis_complete = Complete (2). It also shows a logic builder interface where 'comorb = Other (4)' is selected.

Step 2: Branching Logic

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Step 2: Action Tags

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 name variable based on 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): Small reminder text displayed underneath field

Action Tags / Field Annotation (optional): @NONEOFTHEABOVE="5"

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

Save **Cancel**

Step 2: Piping

Without Data

| | |
|---|----------------------|
| Record ID | 2 |
| Patient | _____ |
| Comorbidities | * must provide value |
| <input type="checkbox"/> Diabetes <input type="checkbox"/> Renal Insufficiency <input checked="" type="checkbox"/> Myocardial <input type="checkbox"/> Other <input type="checkbox"/> None of the above | |

With Piping Data

| | |
|---|----------------------|
| Patient | John Doe 02-10-1989 |
| Comorbidities | * must provide value |
| <input type="checkbox"/> Diabetes <input type="checkbox"/> Renal Insufficiency <input checked="" type="checkbox"/> Myocardial <input type="checkbox"/> Other <input type="checkbox"/> None of the above | |

Step 2: Piping

The screenshot shows a data collection interface with three fields:

- First Name**: Variable: first_name
- Last Name**: Variable: last_name
- DOB**: Variable: dob

A red arrow points from the 'first_name' variable to a central 'Edit Field' dialog. A blue arrow points from the 'last_name' variable to the same dialog. A dark blue arrow points from the 'dob' variable to the same dialog. The 'Edit Field' dialog contains the following text:

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

Field Type: Begin New Section (with optional text) ▾

Field Label:

```
Patient: [first_name] [last_name] [dob]
```

Step 2: Matrix Field

Current instrument: Simple Questions

Add Field Add Matrix of Fields

Matrix group: question_6

These questions are about how you feel and how things have been with you during the past 4 weeks. For each question, please give the one answer that comes closest to the way you have been feeling. How much of the time during the past 4 weeks...

| | All the time | Most of the time | Some of the time | A little of the time | None of the time |
|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| a. Have you felt calm and peaceful? * must provide value | <input type="radio"/> |
| b. Did you have a lot of energy? * must provide value | <input type="radio"/> |
| c. Have you felt downhearted and depressed * must provide value | <input type="radio"/> |

Add Field Add Matrix of Fields

Edit Matrix of Fields

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

Matrix Header Text (optional)
 These questions are about how you feel and how things have been with you during the past 4 weeks. For each question, please give the one answer that comes closest to the way you have been feeling. How much of the time during the past 4 weeks... Expand

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 | Required? | Field Annotation |
|--|---------------|-------------------------------------|--------------------------|
| a. Have you felt calm and peaceful? | calm | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| b. Did you have a lot of energy? | energy | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| c. Have you felt downhearted and depressed | depressed | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

[Add another row](#)

Matrix Column Choices

Choices (one choice per line)

- 4. All the time
- 3. Most of the time
- 2. Some of the time
- 1. A little of the time
- 0. None of the time

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

Other Matrix Info

Answer Format: Single Answer (Radio Buttons)

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

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

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Step 2: Matrix Field

Step 2: Data Dictionary: Bulk Edit

Design your data collection instruments

Not started I'm done!

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](#)

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

This module will allow you to create new data collection instruments/surveys or edit existing ones. Changes may be made by either using the Online Designer or Upload Data Dictionary (see tabs above), in which you may use either method or both. The Online Designer may help you get some initial fields/forms built quickly or to make quick edits, but using the Data Dictionary file may be more helpful if you will be adding a large number of fields to your project.

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

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

Need some help?
 If you wish to view an example of how your Data Dictionary may be formatted, you may download the [Data Dictionary demonstration file](#), or you may view the [Data Dictionary Tutorial Video \(19 min\)](#). For help setting up your Data Dictionary, you may also see the instructions listed on the [Help & FAQ](#).

Steps for making project changes:

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

Upload your Data Dictionary file (CSV file format only)
 Format for min/max validation values for date and datetime fields: DD/MM/YYYY or YYYY-MM-DD

No file chosen

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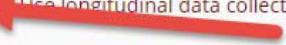
Step 2: Define Events

Project status: Development Completed steps 0 of 7

Main project settings

Not started VIDEO: How to create and manage a survey

VIDEO: How to create and manage a survey



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Step 3: Define Events

Project status: Development Completed steps 2 of 8

Main project settings

Complete! VIDEO: How to create and manage a survey

Complete! VIDEO: How to create and manage a survey

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 reusing data collection instruments and/or set up scheduling.

Go to or

In progress

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Step 3: Define My 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 <small>(optional)</small> | Unique event name <small>(auto-generated)</small> |
|--|---------|--------------------|--|---|
| | 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 |



Step 3: Designate Instruments

[Project Setup](#) [Define My Events](#) [Designate Instruments for My 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"/> |



Step 4: Enable optional Modules/Customisations

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](#)

[Not complete?](#)

Enable optional modules and customizations

Optional

I'm done!

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

[Additional customizations](#)



Step 4: Enable optional Modules/Customisations

Make additional customizations to your project

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

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 [], after which the data collected for those variables for that record will replace the variable in the text. **NOTE:** Since multiple events are defined for this project (i.e. it is longitudinal), **you must prepend the unique event name to the variable name** in brackets - e.g., [baseline_arm_1][last_name]. Smart Variables can also be used here - e.g., [first-event-name][last_name].

Custom record label:

Example: if ([last_name], [first_name]) where entered, then for record '102' it would display '102 (Doe, John)'.

Define a secondary unique field
 Specify a field as your secondary unique field, whose value will be displayed next to the record name when selecting or viewing records/responses in order to more easily identify a record/response. When entering data for the secondary unique field on a form or survey, its value will be checked in real time to ensure it does not duplicate the value from another record. Only 'text' fields may be used. **NOTE:** Since multiple events are defined for this project (i.e. it is longitudinal), the data will only be pulled from the first Event of the currently selected Arm.

| Record ID 1 | | Follow-up 3 Months | Follow-up 6 Months |
|----------------------------|----------------------------------|-----------------------|-----------------------|
| Data Collection Instrument | Baseline | | |
| Demographics | <input checked="" type="radio"/> | | |
| Diagnosis | <input type="radio"/> | | |
| Simple Questions | | <input type="radio"/> | <input type="radio"/> |
| Delete all data on event: | <input type="button" value="X"/> | | |

| Record ID 1 (Email john.liman@monash.edu) John Doe | | Follow-up 3 Months | Follow-up 6 Months |
|--|----------------------------------|-----------------------|-----------------------|
| Data Collection Instrument | Baseline | | |
| Demographics | <input checked="" type="radio"/> | | |
| Diagnosis | <input type="radio"/> | | |
| Simple Questions | | <input type="radio"/> | <input type="radio"/> |

Step 5: Project Bookmarks

Enable optional modules and customizations

| | |
|---------------------------|---|
| Enable | Repeatable instruments and events |
| Disable | Auto-numbering for records |
| Enable | Scheduling module (longitudinal only) |
| Enable | Randomization module |
| Enable | Designate an email field for sending survey invitations |
| Additional customizations | |

Settings displayed to Administrators only:

| | |
|--------|--|
| Enable | Twilio SMS and Voice Call services for surveys |
|--------|--|

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 | Delete |
|--------|------------------------|-----------------------------|----------------|--|-------------------------------------|---------------------------|--------------------------|--------|
| Add | Another REDCap project | Project title: Project Demo | REDCap Project | <input checked="" type="radio"/> All users <input type="radio"/> Selected users | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |

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

Another REDCap project

Help & Information

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

[Contact REDCap administrator](#)

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Step 6: User Rights and Permissions

REDCap

Logged in as John | Log out

My Projects or Control Center

Project Home or Project Setup

REDCap Messenger

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

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
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- API and API Playground
- REDCap Mobile App
- External Modules

Project Bookmarks

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Go to [Add or edit bookmarks](#)

User Rights and Permissions

You may grant other users access to this project or edit the user privileges of current users on this project by navigating to the User Rights page. Additionally, if you wish to limit user access 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](#)

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Step 6: 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.

←

(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 | ✓ | ✓ |
| Data Collector | [No users assigned] | | ✗ | ✗ | ✗ | ✗ | ✓ | ✓ |
| Project Manager | [No users assigned] | | ✓ | ✓ | ✓ | Full Data Set | ✓ | ✓ |



Step 6: 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.

←

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

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 | ✓ | ✓ |



Step 6: Assign User to Role

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

— OR —

Notify user via email?

Create new roles: Add new user roles to your project.

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

Data Collector
 Project Manager

User must exist – if not exist raise a request

| 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 Builder |
|---|--|--|--------------------------|-------------|--------------------|------------------|----------------|
| — | johnl (John Liman) | never | ✓ | ✓ | ✓ | Full Data Set | ✓ |
| Data Collector | [No users assigned] | | ✗ | ✗ | ✗ | ✗ | ✗ |
| Project Manager | [No users assigned] | | ✓ | ✓ | ✓ | Full Data Set | ✓ |



Step 6: Data Access Groups

REDCap

Logged in as Johnl | Log out

My Projects or Control Center

Project Home or Project Setup

REDCap Messenger

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

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

OR

Complete!

Not complete?

Set up project bookmarks (optional)

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

Go to or

User Rights and Permissions

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

Go to or

Optional

I'm done!

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Step 6: 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. | | | | | |
|--|----------------------|--|----|-----------------|---------------------------------------|
| | Enter new group name | <input type="button" value="Add Group"/> | | | |
| Assign user to a group: Users may be assigned to any data access group. | | | | | |
| | Assign user | – Select User – | to | [No Assignment] | <input type="button" value="Assign"/> |

| Data Access Groups | Users in group | Number of records in group | Unique group name (auto-generated) | Group ID number | 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 | | | |

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Step 7: 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.

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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](#)



Using Surveys



Two Type of Survey

Survey that starts with a Public Survey Link

User click on a
generic survey link

Data collection
starts based on the
entered survey
data

E.g. Training Registration Form



Two Type of Survey

Survey that starts with a Data Collection

Data collection
start

Send the **specific**
survey link to
collected data



Creating a Survey

1. Enable the survey feature

Main project settings

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

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

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

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

2. Enable the form as a survey

Data Collection Instruments

| Instrument name | Fields | View PDF | Enabled as survey | Instrument actions | Survey-related options |
|------------------|--------|----------|--|--|---|
| Demographics | 6 | | <input type="button" value="Enable"/> | <input type="button" value="Choose action"/> | <input type="button" value="Survey settings"/> <input type="button" value="Automated Invitations"/> |
| Diagnosis | 3 | | <input type="button" value="Enable"/> | <input type="button" value="Choose action"/> | |
| Simple Questions | 3 | | <input checked="" type="button" value=""/> | <input type="button" value="Choose action"/> | <input type="button" value="Survey settings"/> <input type="button" value="Automated Invitations"/> |

Survey options: [Survey Queue](#) [Survey Login](#)

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](#)



Creating a Survey

3. Designate an email field for sending survey invitations

Enable optional modules and customizations

Repeatable instruments and events [?](#)

Auto-numbering for records [?](#)

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

Randomization module [?](#)

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

Field currently designated: **email ("Email")**



Survey Settings

Set the status title, color, instructions, etc

Basic Survey Options:

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

Survey Instructions
(Displayed at top of survey after title)


[How to use Piping here](#)



Public Survey Link

Manage Survey Participants

 [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.

 **Public Survey not set up yet!**

The public survey has not been set up yet, so a public survey link cannot be displayed here. A public survey is when the first instrument in your project has been enabled as a survey. If you wish to enable a public survey, you may click the button below, after which you will be able to obtain your public survey link and utilize the Participant List for the public survey.

[Enable public survey](#)



Participant List

Manage Survey Participants

[Public Survey Link](#) [Participant List](#) [Survey Invitation Log](#)

The Participant List option allows you to **send a customized email** to anyone in your list and **track who responds to your survey**. It is also possible to identify an individual's survey answers, if desired, by providing an Identifier for each participant (this feature must first be enabled by clicking the 'Enable' button in the table below). [More details](#)

| Participant List belonging to "Simple Questions" - Baseline | | | | | | | |
|---|--------|------------------------|----------------------------------|-----------------------|--------------------------|--------------------------|---|
| Email | Record | Participant Identifier | Responded? | Invitation Scheduled? | Invitation Sent? | Link | Survey Access Code and QR Code |
| christopher.robyn@monash.edu | 2 | Disabled | <input checked="" type="radio"/> | - | <input type="checkbox"/> | <input type="checkbox"/> |  |
| Christopher.Mace@monash.edu | 8 | Disabled | <input checked="" type="radio"/> | - | <input type="checkbox"/> | <input type="checkbox"/> |  |
| John.Doe@monash.edu | 6 | Disabled | <input checked="" type="radio"/> | - | <input type="checkbox"/> | <input type="checkbox"/> |  |
| john.liiman@monash.edu | 1 | Disabled | <input checked="" type="radio"/> | - | <input type="checkbox"/> | <input type="checkbox"/> |  |
| Kelly.Hillman@monash.edu | 7 | Disabled | <input checked="" type="radio"/> | - | <input type="checkbox"/> | <input type="checkbox"/> |  |
| Kenny.Rogers@monash.edu | 5 | Disabled | <input checked="" type="radio"/> | - | <input type="checkbox"/> | <input type="checkbox"/> |  |
| michael.wong@monash.edu | 4 | Disabled | <input checked="" type="radio"/> | - | <input type="checkbox"/> | <input type="checkbox"/> |  |
| Michelle.Pullman@monash.edu | 9 | Disabled | <input checked="" type="radio"/> | - | <input type="checkbox"/> | <input type="checkbox"/> |  |
| sum.bar.dee@monash.edu | 3 | Disabled | <input checked="" type="radio"/> | - | <input type="checkbox"/> | <input type="checkbox"/> |  |



Application and Tools



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 Edit

- Calendar
- Data Exports, Reports, and Stats
- Data Import Tool
- Data Comparison Tool
- Logging View log entries
- 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.

Dashboard displayed: Default dashboard Create a custom dashboard

Displaying Data Access Group: ALL Change

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

Legend for status icons:

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

| Record ID | Baseline | | Follow-up 3 Months | Follow-up 6 Months |
|--|--------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| | Demographics | Diagnosis | | |
| 1 (Email john.liman@monash.edu) John Doe | ● | ○ | ○ | ○ |
| 2 (Email christopher.robyn@monash.edu) Christopher Robyn | ● | ● | ○ | ○ |
| 3 (Email sumbd@monash.edu) Sum Bar Dee | ● | ○ | ○ | ○ |

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

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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 Edit

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- Logging** View log entries
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- 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) Change

Filter by user name: All users Change

Filter by record: All records Change

Filter by records in a DAG: Change

Filter by time range from Change to Change

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

| 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', |

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Field Data History

DOB
* must provide value

Gender
* must provide value

Email
* must provide value

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 |

Close



Data Exports



Logged in as Johnl | Log out

My Projects or Control Center

Project Home or Project Setup

REDCap Messenger

Project status: Development

Data Collection

- Record Status Dashboard
- Add / Edit Records

Applications

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

Project Bookmarks

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 and/or events (all records) | Make custom selections | | |
| + Create New Report | | | |



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" | | Instrument: Demographics |
| Field 2 | first_name "First Name" | | Instrument: Demographics |
| Field 3 | last_name "Last Name" | | Instrument: Demographics |
| Field 4 | dob "DOB" | | Instrument: Demographics |



Create New Reports

STEP 3

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

Filters (optional)

| | | |
|----------|-----------------------------------|-------------|
| Filter 1 | demographics_complete "Complete?" | = Complete |
| in | All events | |

AND

| | | |
|----------|----------------------|--|
| Filter 2 | -- select a field -- | |
| in | All events | |

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] |
| Live Filter 2 | -- select a field -- |
| Live Filter 3 | -- select a field -- |

STEP 4

Order the Results (optional)

| | | |
|----------|-----------------------------------|-----------------|
| First by | record_id "Record ID" | Ascending order |
| Then by | Type variable name or field label | Ascending order |
| Then by | Type variable name or field label | Ascending order |

[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

- [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)

Ready for Follow-Up

| Record ID | Event Name | Data Access Group | First Name | Last Name | DOB | Gender | 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 |

Data Dictionary Codebook

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

Quick Tasks

- [Codebook](#) **Codebook**
- [Export data](#)
- [Create a report](#)
- [Check data quality](#)
- [User Rights](#)
- [Online Designer and Data Dictionary Upload](#)
- [Copy this project](#)
- [Data Access Groups](#)

Project is not used as a template [Add](#)

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

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

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

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

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](#)

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.

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.

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Data Dictionary 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: Demographics (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 1 Male 0 Female |
| | 6 | email | Email | text (email), Required, Identifier |

Data Import

Tips

- Perform All Data Export (raw data) and take a look on how it was structured
- Empty columns can be removed from the import file
- Always perform Data Quality check after import (next topic)

Data Import

REDCap™

Logged in as John | Log out

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

Data Collection Edit Instruments

- Record Status Dashboard
- Add / Edit Records

Applications

- Calendar
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- Data Comparison Tool
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- E-signature and Locking Mgmt
- Data Quality
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- REDCap Mobile App
- External Modules

Project Bookmarks

Data Import Tool

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

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

CSV import **CDISC ODM (XML) import**

Instructions:

- Click the link below to download your data import template as a CSV (comma delimited) file. Save it locally to your computer and then open it to begin filling it with the data you wish to import.
[Download your Data Import Template \(with records in rows\)](#) 
OR
[Download your Data Import Template \(with records in columns\)](#)
- In each column of the Data Import Template file that you downloaded, place the data for each record that you wish to import. Once all your data has been added, save the file.
 - Be sure not to change the Variables/Field Names in the file or an error may occur.
 - Also, for all of the 'dropdown' or 'radio' fields in the project, you must make sure that the numerical value (rather than the text value) is entered in those cells, or else it cannot be processed.
 - Any empty rows or columns in the file can be safely deleted before importing the file. Doing this reduces the upload processing time, especially for large projects.
- Click the 'Browse' or 'Choose File' button below to select the file on your computer, and upload it by clicking the 'Upload File' button.

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Data Import

Sample File

ProjectDemo_ImportTemplate_2018-10-08.csv - Excel

| | A | B | C | D | E | F | G | H | I |
|---|-----------|-------------------|--------------------------|-------------|-----------|------------|--------|-----------------------------|-----------------------|
| 1 | record_id | redcap_event_name | redcap_data_access_group | first_name | last_name | dob | gender | email | demographics_complete |
| 2 | 1 | baseline_arm_1 | alfred_hospital | Kenny | Rogers | 31/01/1990 | 1 | Kenny.Rogers@monash.edu | 2 |
| 3 | 2 | baseline_arm_1 | cabrini_hospital | John | Doe | 10/10/1980 | 1 | John.Doe@monash.edu | 2 |
| 4 | 3 | baseline_arm_1 | royal_melbourne_ho | Kelly | Hillman | 11/12/2000 | 0 | Kelly.Hillman@monash.edu | 2 |
| 5 | 4 | baseline_arm_1 | st_vincent_hospita | Christpoher | Mace | 15/02/1989 | 1 | Christpoher.Mace@monash.edu | 2 |
| 6 | 5 | baseline_arm_1 | | Michelle | Pullman | 5/05/1977 | 0 | Michelle.Pullman@monash.edu | 2 |

MONASH University

Data Import

How to assign records to Data Access Groups:

Since this project has Data Access Groups and since you are not in a group, you are able to assign or re-assign records to groups. You may assign records to groups by utilizing the 'redcap_data_access_group' field in your data import file, in which you will provide a **unique group name** for each record. A list of all the unique names for each Data Access Group are listed on the [Data Access Groups](#) page.

How to import records for events:

In order to import records for longitudinal projects such as this one, you must use the 'redcap_event_name' field in your data import file, in which you will provide a **unique event name** for each record. This will tell it which event that the data belongs to for that record. A list of all the unique names are listed on the [Define My Events](#) page. If the 'redcap_event_name' field is not specified for every record being imported, it will display an error.

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

Format for date and datetime values: DD/MM/YYYY or YYYY-MM-DD

Allow blank values to overwrite existing saved values? No, ignore blank values in the file (default)

Name the imported records automatically (force record auto-numbering)? No, use the record name provided

Upload your CSV file:

None chosen



Data Quality



Logged in as Johnl | Log out

or
 or

Project status: Development

Data Collection

- View data collection status of all records

- Create new records or edit/view existing ones

Applications

Data Quality

Project Bookmarks

Data Quality

This module will allow you to execute data quality rules upon your project data to check for discrepancies in your data. Listed below are some pre-defined data rules that you may utilize and run. You may also create your own rules or edit, delete, or reorder the rules you have already created. To find discrepancies for a given rule, simply click the Execute button next to it, or click the Execute All Rules button to fire all the rules at once. It will provide you with a total number of discrepancies found for each rule and will allow you to view the details of those discrepancies by clicking the View link next to each. [Read more detailed instructions.](#)

| Data Quality Rules | | | | | | |
|--------------------|---|--|---------------------|--|-----------------|----------------------|
| | | Execute rules: | | Apply to: | | |
| Rule # | Rule Name | Rule Logic (Show discrepancy only if...) | Real-time execution | Total Discrepancies | Alfred Hospital | Cabrini Hospital |
| A | Missing values* | - | | <input type="button" value="Execute"/> | | Royal Melbourne Hosp |
| B | Missing values* (required fields only) | - | | <input type="button" value="Execute"/> | | |
| C | Field validation errors (incorrect data type) | - | | <input type="button" value="Execute"/> | | |
| D | Field validation errors (out of range) | - | | <input type="button" value="Execute"/> | | |
| E | Outliers for numerical fields (numbers, integers, sliders, calc fields)** | - | | <input type="button" value="Execute"/> | | |
| F | Hidden fields that contain values*** | - | | <input type="button" value="Execute"/> | | |
| G | Multiple choice fields with invalid values | - | | <input type="button" value="Execute"/> | | |
| H | Incorrect values for calculated fields | - | | <input type="button" value="Execute"/> | | |

Data Quality

Date of birth must not be greater than today's date

Add Enter descriptive name for new rule (e.g., Participants below age 18)

Valid Enter logic for new rule (e.g., [age] < 18) `datediff([dob],"today","d","dm","y",true) < 0`

Execute in real time on data entry forms?

⚠ WARNING: Data Quality rules were violated!

The Data Quality rules listed below were found to have discrepancies for this record. Review the table below to see which rules were violated so that the data values for the fields involved can be corrected, if necessary. You may exclude a result in the table by clicking the 'Exclude' link on the right side, after which that rule will no longer be displayed for this record whenever the record is saved.

| Rule(s) violated | Fields involved | Exclude  |
|---|-----------------|---|
| Rule #1: Date of birth must not be greater than today's date <code>datediff([dob],"today","d","dm",true) < 0</code> | dob: 03-10-2018 | exclude |

[Close](#)



Help and Resources



Help Resources

Blue Button

[✉ Contact REDCap administrator](#)

Help Tab

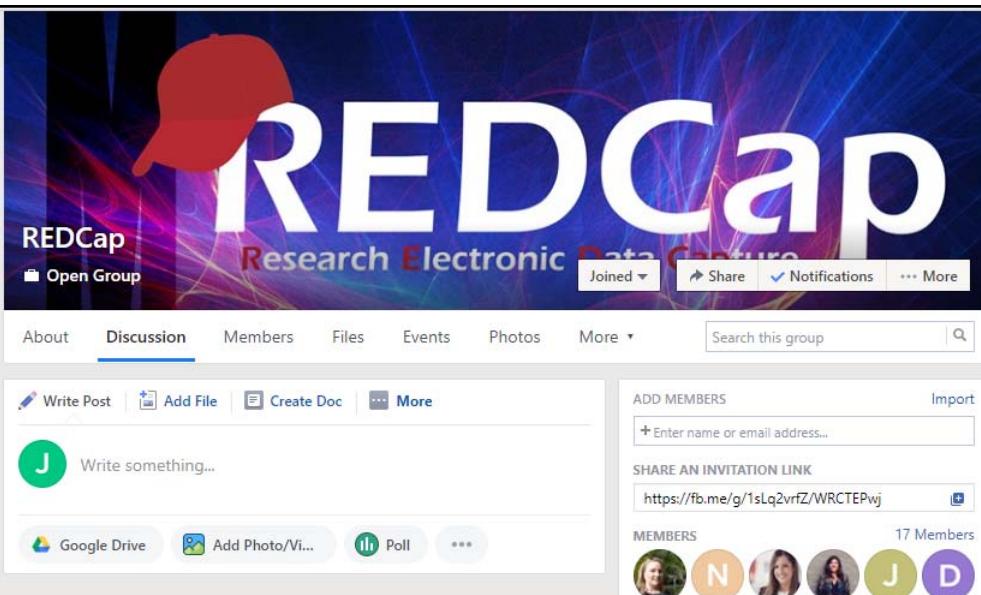


Email

- redcap@monash.edu

Workplace

- <https://monash.facebook.com/groups/monashredcap/>
- Regular User Group @ Monash

REDCap Group Workplace





REDCap Citation

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

¹REDCap (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.

¹Paul 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.

