

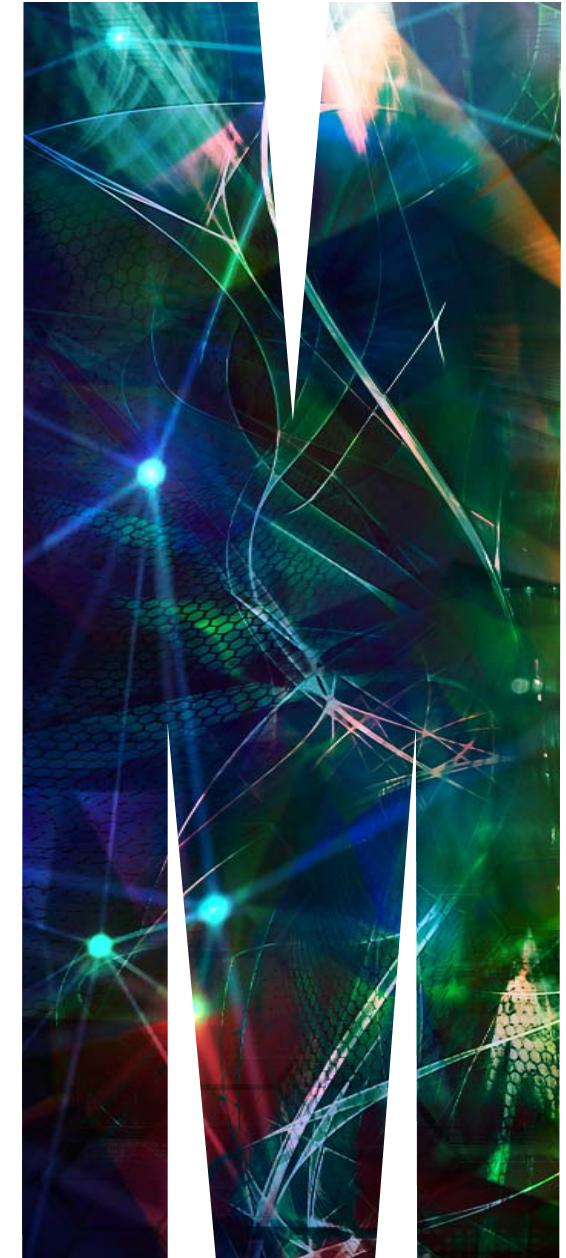
Introduction to REDCap™

John Liman

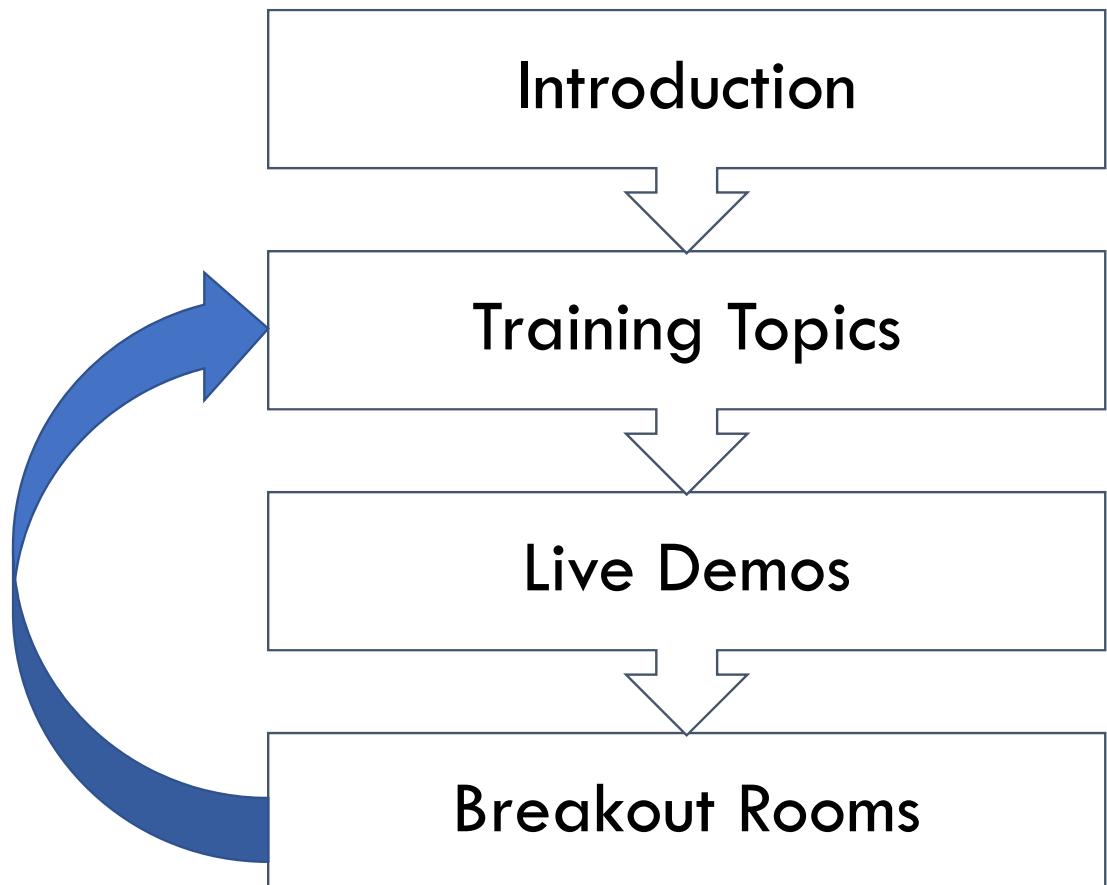
REDCap Administrator

redcap@monash.edu

27 Sept 2020



Course Approach



REDCap Introduction



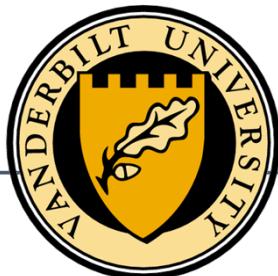
Who Created REDCap and Who Uses it?

THEN

2004: Developed at Vanderbilt Univ.

2006: Global consortium started

2014: Monash joined



NOW

Worldwide: (Aug 2020)

+4456 institutions /138 countries

+983,000 projects

+1,400,000 users

REDCap @ Monash:

+680 projects

+3500 users



REDCap Project Request

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://is.gd/mhtpredcap>

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

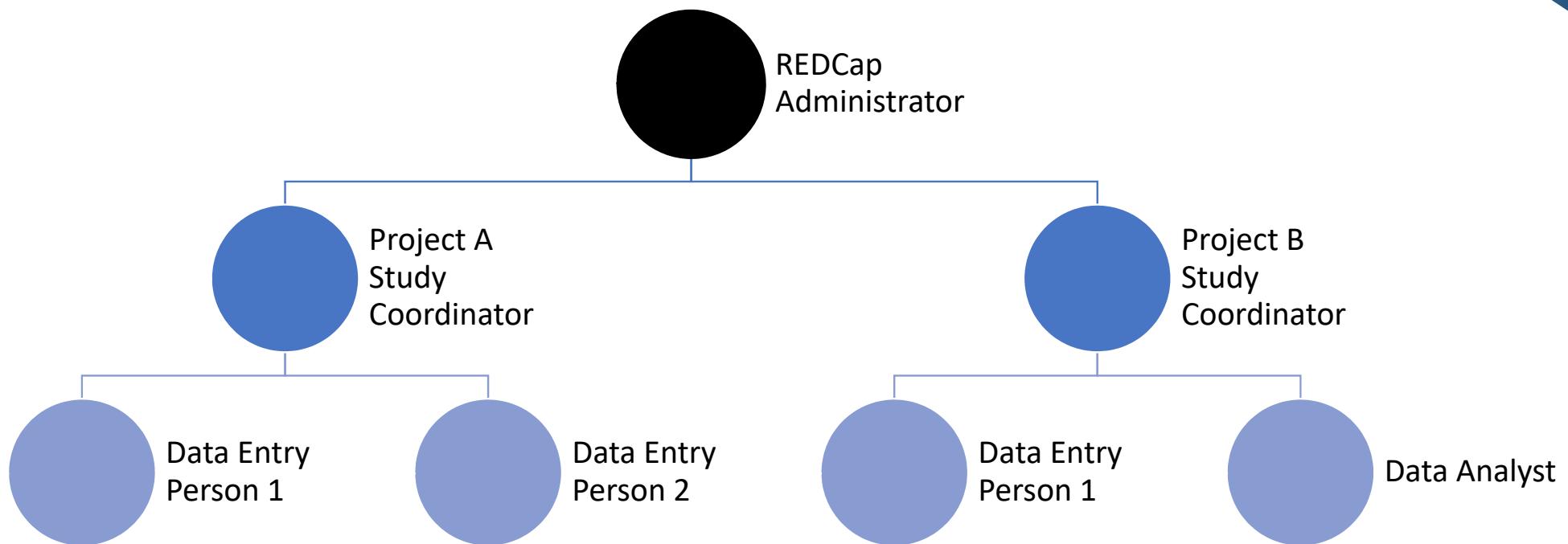
- Enabling surveys
- Settings & customisations
- Public link vs private links

Training Topics

Applications & Tools

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

REDCap Users



Training project

My Project Study ID : _____

Demographics Form Date : _____

Study ID:	
First name:	
Last Name:	
DOB: (dd-mm-yyyy)	
Gender: (M, F, Other)	
Email:	

1

My Project Study ID : _____

Diagnosis Form Date : _____

Primary Diagnosis: _____

Comorbidities:

(Tick all that apply, or 'none of the above')

Diabetes

Renal Insufficiency

Myocardial

Other/s

If Other/s, please specify _____

None of the above

My Project Study ID : _____

Initial Survey Date : _____

Please tell us about your feelings and experiences during the last 4 Weeks.
(one tick response only for each question)

	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?					
b. Did you have a lot of energy?					
c. Have you felt downhearted and depressed?					

My Project Study ID : _____

Survey - 3-Month Follow-up Date : _____

Please tell us about your feelings and experiences during the last 4 Weeks.
(one tick response only for each question)

	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?					
b. Did you have a lot of energy?					
c. Have you felt downhearted and depressed?					

My Project Study ID : _____

Survey - 6-Month Follow-up Date : _____

Please tell us about your feelings and experiences during the last 4 Weeks.
(one response for each question)

	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?					
b. Did you have a lot of energy?					
c. Have you felt downhearted and depressed?					

Project Setup



Logging on to training System

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

Your user name is:

Your allocated number from the google registration sheet.
Eg. traininguser01, traininguser24

Your password for today is:

20200928

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:	<input type="text"/>
Password:	<input type="password"/>

[Log In](#)

[Forgot your password?](#)

My Projects

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

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

 MONASH University

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 test 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	Filter projects by title				
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



Logged in as dbrown | Log out

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

[REDCap Messenger](#)

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

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

Help & Information

- [Help & FAQ](#)

Monash University

2020 - Training Project 00

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

Project status:  Development

Completed steps 0 of 7

Main project settings

- Not started
- Enable [Use surveys in this project?](#) [VIDEO: How to create and manage a survey](#)
- Enable [Use longitudinal data collection with defined events?](#)
- [I'm done!](#)
- [Modify project title, purpose, etc.](#)

Design your data collection instruments

Click if finished with this step.

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

[I'm done!](#)

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

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

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

Enable optional modules and customizations

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

[Additional customizations](#)

Settings displayed to Administrators only:

Step 1: Main Project Settings

 Project Home

 Project Setup

 Other Functionality

 Project Revision History

Project status:  Development

Completed steps 0 of 7



Not started

I'm done!

Main project settings

 Enable

 Use surveys in this project? 



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

 Enable

 Use longitudinal data collection with defined events? 

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

Step 1: Main Project Settings

 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.](#)

Step 2: Online Designer

Project status:  Development Completed steps 1 of 8

 Complete!

[Not complete?](#)

Main project settings

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

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

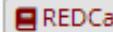
[Modify project title, purpose, etc.](#)

 Not started

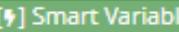
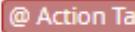
[I'm done!](#)

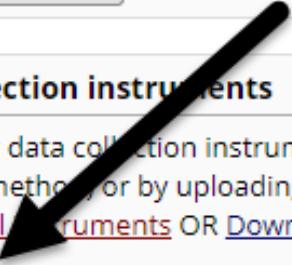
Design your data collection instruments

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](#)



Step 2: Online Designer

The screenshot shows the REDCap Online Designer interface. At the top, there are four tabs: Project Home, Project Setup, Online Designer (which is selected), and Data Dictionary. Below the tabs are two buttons: "Create snapshot of instruments" and "VIDEO: How to use this page". A note indicates "Last snapshot: never".

The main content area is titled "Data Collection Instruments" and contains three options for adding new instruments: "Create a new instrument from scratch", "Import a new instrument from the official REDCap Shared Library", and "Upload instrument ZIP file from another project/user or external libraries".

A table lists existing instruments:

Instrument name	Fields	View PDF	Instrument actions
My First Instrument	1		

Step 2: Online Designer

Project Home Project Setup Online Designer Data Dictionary

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.

	Instrument name	Fields	View PDF	Instrument actions
	Demographics	1	[edit]	Choose action ▾
	Diagnosis	0	[edit]	Choose action ▾
	Simple Questions	0	[edit]	Choose action ▾

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

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 **Edit icon**. If you decide that you do not want to keep fields, simply **drag and drop** a field to a different location and 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

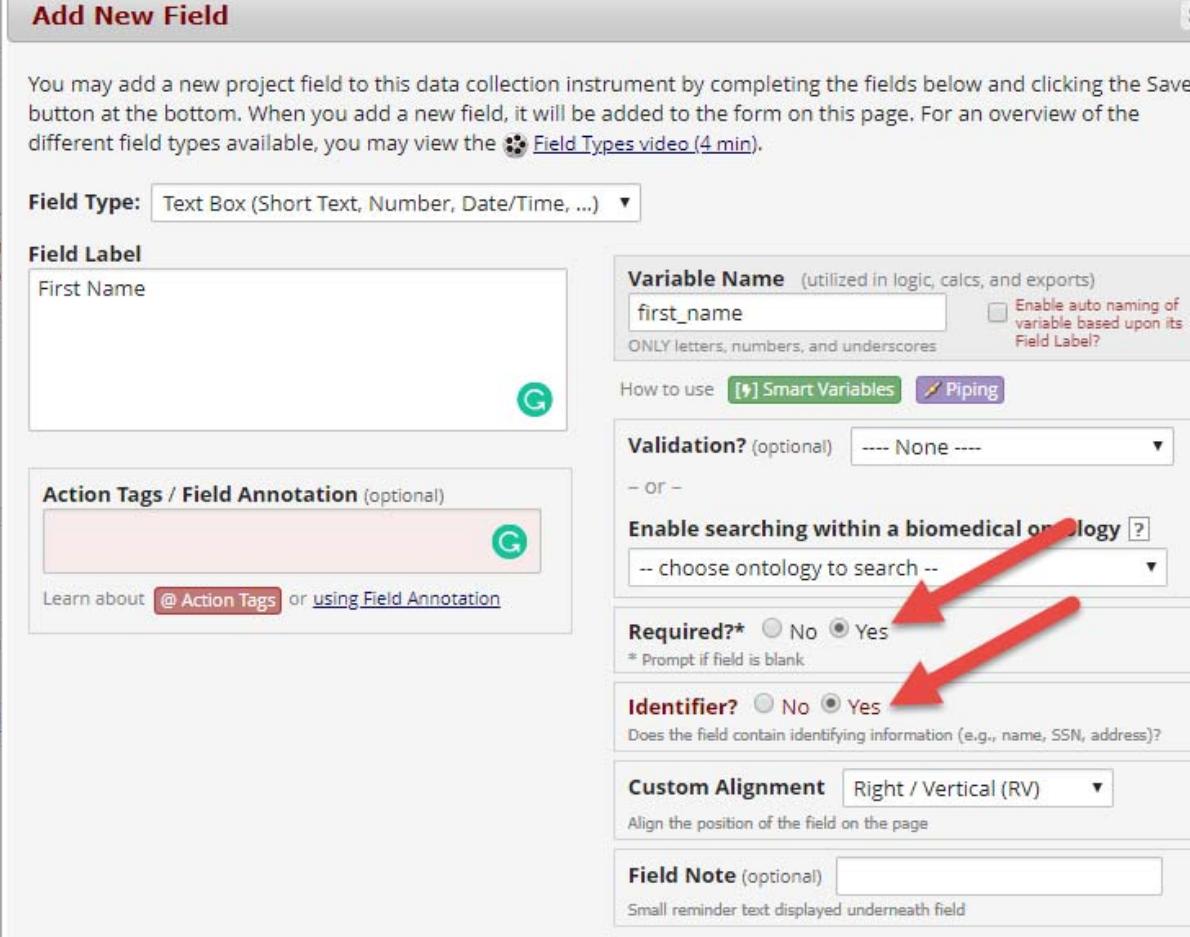
Identifier? Yes No
Does the field contain identifying information (e.g., name, SSN, address)?

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**



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 31 Today D-M-Y * must provide value

Add Field Add Matrix of Fields

Variable: gender

Gender Male Female [reset](#)

Add Field Add Matrix of Fields

Variable: email

Email * must provide value

Step 2: Edit/Copy/Move/Delete Fields

The screenshot shows a user interface for managing form fields. At the top, there is a toolbar with several icons: a pencil (Edit), a blue folder (Copy), a green arrow (Move), a white document with a plus sign (New), and a red X (Delete). The icon for 'Delete' is highlighted with a red box. To the right of the toolbar, the text 'Variable: first_name' is displayed. Below the toolbar, the field name 'First Name' is shown in bold black text. Underneath the field name, a red asterisk indicates a required field: '* must provide value'. To the right of the field name is a large, empty rectangular input box.

Improving Form Layout

Field Embedding (new feature of version 10)

Demographics

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

Data Access Group: [No Assignment] ?

Event Name: Baseline

Record ID 1 To rename the record, see the record action drop-down at top of the Record Home Page.

First name:	David
Last Name:	Jones
Date of Birth:	18-02-1985 Today D-M-Y
Gender:	<input type="radio"/> Female <input checked="" type="radio"/> Male <input type="radio"/> Other
email address	david.brown@monash.edu
* must provide value	
Form Status	
Complete?	Complete
Lock this instrument?	<input type="checkbox"/> 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 & Exit Form"/> <input type="button" value="Save & 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

Data Access Group: [No Assignment] ?

Event Name: Baseline

Record ID 1 To rename the record, see the record action drop-down at top of the Record Home Page.

First Name	Last Name	DOB:
David	Jones	18-02-1985 <input type="button" value="Today"/> <input type="button" value="D-M-Y"/>
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	
* must provide value		
Form Status		
Complete?	Complete	
Lock this instrument?	<input type="checkbox"/> 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 & Exit Form"/> <input type="button" value="Save & 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.		

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.

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: Descriptive Text (with optional Image/Video/Audio/File Attachment) Use the Rich Text Editor

Field Label:

First Name	Last Name:	DOB:
{first_name}	{last_name}	{dob}

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

How to use Smart Variables Piping Field embedding

Optional file attachment, image, audio, or video:
Embed an external video (provide video URL)
e.g. <https://youtube.com/watch?v=E1cCuWMupz0>, <https://vimeo.com/62730281>, <http://example.com/movie.mp4>

Display format of video: Inline Inside popup
- or -

Attach an image, file, or embedded audio
 Upload file

Display format of attachment on page:
 Link
 Inline image
 Audio file (play in embedded player on page)
[Compatibility notice for embedded audio](#)

(Images wider than 600 pixels will be downsized to fit page.)

Action Tags / Field Annotation (optional)

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

Save **Cancel**

Improving Form Layout

Design Mode

Current instrument: Demographics

Preview instrument

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

First name: Variable: first_name Field is embedded elsewhere on page

Last Name: Variable: last_name Field is embedded elsewhere on page

Date of Birth: Today D-M-Y Variable: dob Field is embedded elsewhere on page

First Name Last Name: DOB: Variable: demo How to embed a field elsewhere

Gender: Female Male Other

email address: * must provide value Variable: email How to embed a field elsewhere

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.

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

Gender: Female Male Other

email address:

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.

Lock

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.



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University

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: [-- select record --](#)

— OR —

Drag-N-Drop Logic Builder

Displaying field choices for the following data collection instrument:

Diagnosis ▾

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

Step 2: 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 Enable auto naming variable based upon Field Label?

ONLY letters, numbers, and underscores

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

Required?* Yes No * 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): (optional)
@NONEOTHEABOVE="5"

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

Save Cancel

Step 2: Piping

Without Data

Record ID	2
Patient	<input type="text"/>
Comorbidities	<p>* must provide value</p> <ul style="list-style-type: none"><input type="checkbox"/> Diabetes<input type="checkbox"/> Renal Insufficiency<input type="checkbox"/> Myocardial<input type="checkbox"/> Other<input type="checkbox"/> None of the above

With Piping Data

Patient	John Doe 02-10-1989
Comorbidities	<p>* must provide value</p> <ul style="list-style-type: none"><input type="checkbox"/> Diabetes<input type="checkbox"/> Renal Insufficiency<input 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 on the left and an 'Edit Field' dialog on the right.

Fields on the Left:

- First Name:** Variable: first_name. A blue arrow points from this field to the 'Field Label' input in the 'Edit Field' dialog.
- Last Name:** Variable: last_name. A red arrow points from this field to the 'Field Label' input in the 'Edit Field' dialog.
- DOB:** Variable: dob. A blue arrow points from this field to the 'Field Label' input in the 'Edit Field' dialog.

Edit Field Dialog (Right):

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**

[Preview instrument](#)

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...

Variable: calm

	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?	<input type="radio"/>				

* must provide value [reset](#)

Variable: energy

	All the time	Most of the time	Some of the time	A little of the time	None of the time
b. Did you have a lot of energy?	<input type="radio"/>				

* must provide value [reset](#)

Variable: depressed

	All the time	Most of the time	Some of the time	A little of the time	None of the time
c. Have you felt downhearted and depressed	<input type="radio"/>				

* must provide value [reset](#)

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 provided for each field in the matrix, and you must also set the Choices (i.e. matrix column headers) and answer format (Single Answer vs. Multiple Answers) for the entire matrix. [View a matrix example](#) or [Read more about matrix fields on the Help & FAQ](#).

Matrix Header Text (optional)

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?

Variable Name

ONLY letters,
numbers, and
underscores

Required?*Field Annotation [?](#)

Field Label

a. Have you felt calm and peaceful?

calm



b. Did you have a lot of energy?

energy



c. Have you felt downhearted and depressed

depressed



[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

question_6

[What is a matrix group name?](#)

Step 2: Matrix Field

Step 2: Data Dictionary: Bulk Edit

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 I'm done!

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

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

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

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

 [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 for this 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 \(10 min\)](#). 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](#)
- 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:

No file chosen

Step 2: Define Events

Project status:  Development Completed steps **0 of 7**

[Edit project settings](#)

Main project settings

 Not started

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

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

Modify project title, purpose, etc.



Step 3: Define Events

Project status:  Development Completed steps 2 of 8

 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? [?](#)

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

 Complete!

Design your data collection instruments

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

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

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

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

 In progress

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!](#)

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>?</small> (optional)	Unique event name <small>?</small> (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

Step 3: Designate Instruments



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.

The screenshot shows a table for mapping data collection instruments to events. The table has columns for 'Data Collection Instrument' and 'Baseline (1)', 'Follow-up 3 Months (2)', and 'Follow-up 6 Months (3)'. The rows list 'Demographics', 'Diagnosis', and 'Simple Questions'. Checkmarks indicate which instrument is assigned to which event. Buttons for 'Begin Editing', 'Save', and 'Select All / Deselect All' are visible at the top of the table.

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

 Complete!

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?](#)

 Optional

[I'm done!](#)

Enable optional modules and customizations

<input type="button" value="Enable"/>	<input checked="" type="radio"/> Repeatable instruments and events ?
<input type="button" value="Disable"/>	<input checked="" type="checkbox"/> Auto-numbering for records ?
<input type="button" value="Enable"/>	<input checked="" type="radio"/> Scheduling module (longitudinal only) ?
<input type="button" value="Enable"/>	<input checked="" type="radio"/> Randomization module ?
<input type="button" value="Enable"/>	<input checked="" type="radio"/> 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 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 [], 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, Jon)'.

 **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

Data Collection Instrument	Baseline	Follow-up 3 Months	Follow-up 6 Months
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

Data Collection Instrument	Baseline	Follow-up 3 Months	Follow-up 6 Months
Demographics	<input checked="" type="radio"/>		
Diagnosis	<input type="radio"/>		
Simple Questions		<input type="radio"/>	<input type="radio"/>

Step 5: Project Bookmarks

 Complete!

 Not complete?

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 [?](#)

Settings displayed to Administrators only:

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

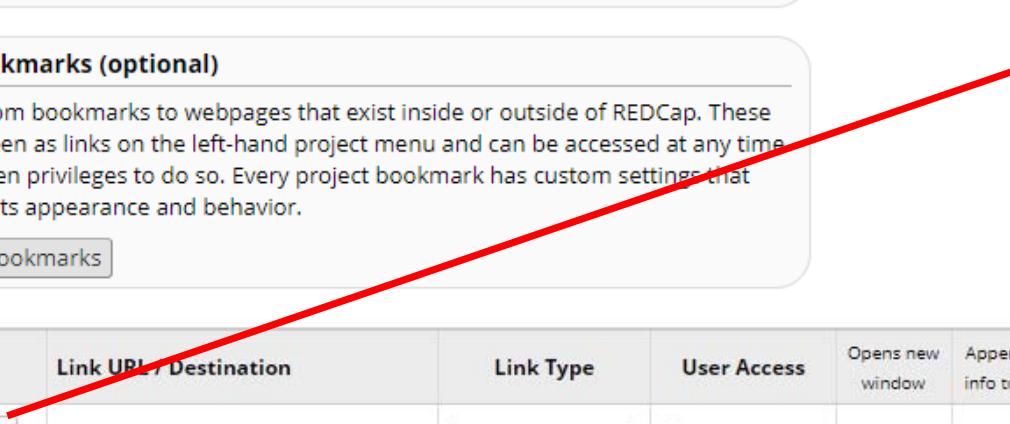
 Optional

 I'm done!

Set up project bookmarks (optional)

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

Go to



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

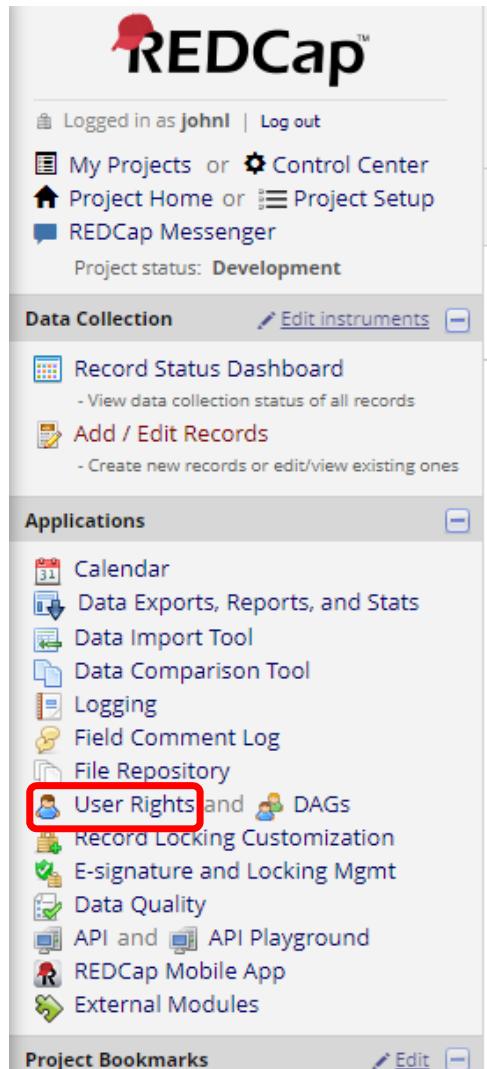
Help & Information

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

 Contact REDCap administrator

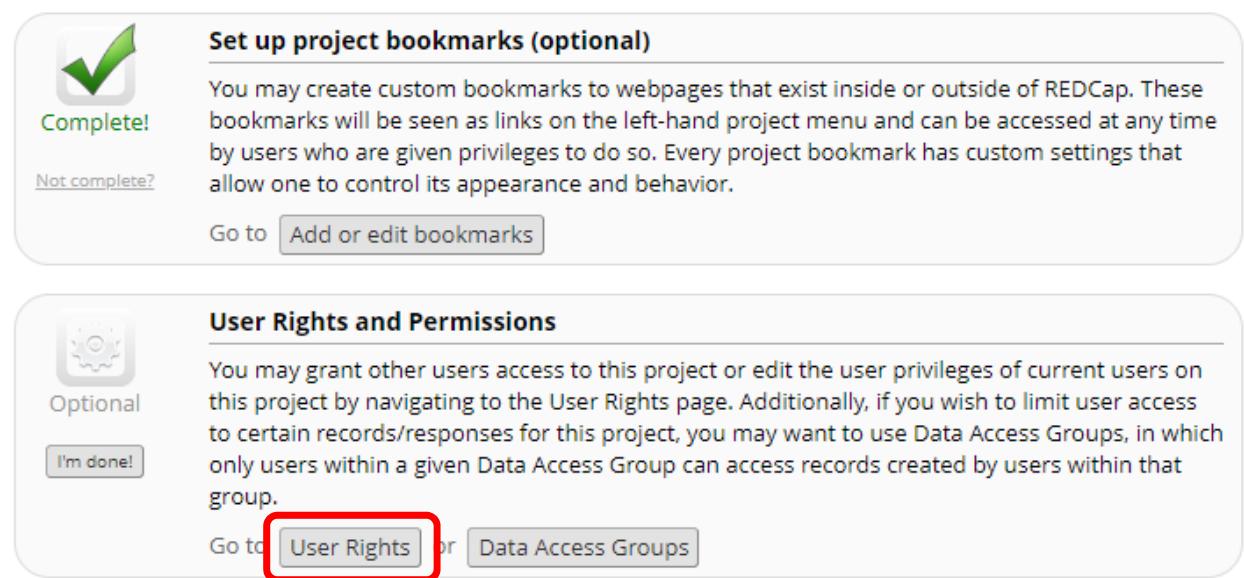
Link #	Link Label	Link URI / Destination	Link Type	User Access	Opens new window	Append record info to URL 	Append project ID to URL 	Delete
<input type="button" value="Add"/>	<input type="text" value="Another REDCap project"/> Enter the label for the link as it is seen on the left-hand menu	Project title: Project Demo	<input type="button" value="REDCap Project"/> 	<input checked="" type="radio"/> All users <input type="radio"/> Selected users	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Delete"/>

Step 6: User Rights and Permissions



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". A message "Project status: Development" is displayed. Under "Data Collection", there are links for "Record Status Dashboard" and "Add / Edit Records". Under "Applications", there are links for "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 is a "Project Bookmarks" section with a "Edit" button.

OR



The screenshot shows two optional steps. The first step, "Set up project bookmarks (optional)", has a "Complete!" button with a green checkmark and a "Not complete?" link. The second step, "User Rights and Permissions", has an "Optional" button with an "I'm done!" link. Both steps have "Go to" buttons: "Add or edit bookmarks" for the first and "User Rights" and "Data Access Groups" for the second. The "User Rights" button in the second section is highlighted with a red box.

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](#)

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](#)

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.

 [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	✓	✓
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.

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.

Add new user Add with custom rights
— OR —

n.hay Notify user via email?

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

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	Rep Rep Bui
—	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

The screenshot shows the REDCap Project Home interface. At the top, it says "Logged in as johnl | Log out". Below that is a navigation bar with links: "My Projects" (highlighted), "Control Center", "Project Home" (highlighted), "Project Setup", and "REDCap Messenger". A message "Project status: Development" is displayed. The main content area has sections for "Data Collection" (with "Edit instruments" link) and "Applications". Under "Applications", there are several tools: Calendar, Data Exports, Reports, and Stats, Data Import Tool, Data Comparison Tool, Logging, Field Comment Log, File Repository, User Rights and DAGs (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 is a "Project Bookmarks" section with an "Edit" link.

OR

The image shows two optional steps for setting up project bookmarks or Data Access Groups. The first step, "Set up project bookmarks (optional)", features a green checkmark icon and a "Complete!" button. It includes a "Not complete?" link and a "Go to Add or edit bookmarks" button. The second step, "User Rights and Permissions", features a gear icon and an "Optional" button. It includes an "I'm done!" link and a "Go to User Rights or Data Access Groups" button. The "Data Access Groups" button is highlighted with a red box.

Step 6: Data Access Group



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

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

Assign user to

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			

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.

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



Creating a Survey

1. Enable the survey feature

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.

2. Enable the form as a survey

Data Collection Instruments

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

Add new instrument:

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

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

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

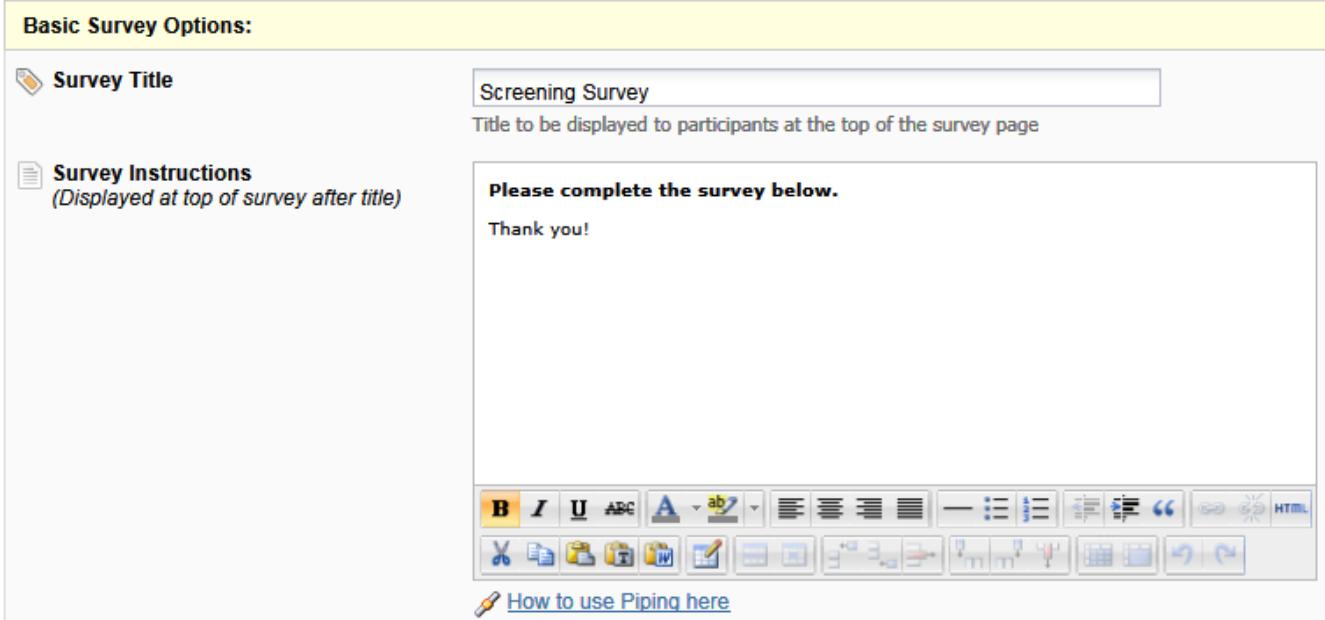
Basic Survey Options:

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

Survey Instructions
(Displayed at top of survey after title)

Please complete the survey below.
Thank you!

HTML Editor Tools:



[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"/>	-				
Christpoher.Mace@monash.edu	8	Disabled	<input checked="" type="radio"/>	-				
John.Doe@monash.edu	6	Disabled	<input checked="" type="radio"/>	-				
john.liman@monash.edu	1	Disabled	<input checked="" type="radio"/>	-				
Kelly.Hillman@monash.edu	7	Disabled	<input checked="" type="radio"/>	-				
Kenny.Rogers@monash.edu	5	Disabled	<input checked="" type="radio"/>	-				
michael.wong@monash.edu	4	Disabled	<input checked="" type="radio"/>	-				
Michelle.Pullman@monash.edu	9	Disabled	<input checked="" type="radio"/>	-				
sum.bar.dee@monash.edu	3	Disabled	<input checked="" type="radio"/>	-				

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 [+]

- Calendar
- Data Exports, Reports, and Stats
- Data Import Tool
- Data Comparison Tool
- Logging
- Field Comment Log
- File Repository
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- 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 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	●	○	○	○
2 (Email christopher.robyn@monash.edu) Christopher Robyn	●	●	○	○
3 (Email sumbd@monash.edu) Sum Bar Dee	●	○	○	○

Legend for status icons:

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

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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](#)

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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',

Field Data History

DOB * must provide value	<input type="text"/> 02-10-1999 <input type="button" value="Today"/> D-M-Y
Gender * must provide value	<input type="radio"/> Male <input checked="" type="radio"/> Female
Email * must provide value	<input type="text"/> 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

Data Exports

REDCap™

Logged in as johnl | Log out

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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)	View Report Export Data Stats & Charts		
B	Selected instruments and/or events (all records)	Make custom selections		
	+ Create New Report			

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Create New Reports

Data Exports, Reports, and Stats

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



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

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		Operator / Value	
demographics_complete "Complete?"	RB	=	Complete
in	All events		X

AND ▾

Filter 2			
-- select a field --	RB		
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"	RB	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

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Reports [Edit reports](#)

- [1\) 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](#)

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

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

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

Data Dictionary Codebook

Project Home Project Setup Other Functionality Project Revision History

Quick Tasks

Codebook (highlighted with a red box)

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.

Create 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.

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 <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				

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 johnl | Log out

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Project Bookmarks Edit

Data Import Tool

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

NOTICE:

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



[CSV import](#)



[CDISC ODM \(XML\) import](#)

Instructions:

- 1.) Click the link below to download your data import template as a CSV (comma delimited) file. Save it locally to your computer and then open it to begin filling it with the data you wish to import.
[Download your Data Import Template \(with records in rows\)](#) ↗
[Download your Data Import Template \(with records in columns\)](#)
- 2.) In each column of the Data Import Template file that you downloaded, place the data for each record that you wish to import. Once all your data has been added, save the file.
 - Be sure not to change the Variables/Field Names in the file or an error may occur.
 - 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.
- 3.) Click the 'Browse' or 'Choose File' button below to select the file on your computer, and upload it by clicking the 'Upload File' button.

Data Import

Sample File

The screenshot shows a Microsoft Excel spreadsheet titled "ProjectDemo_ImportTemplate_2018-10-08.csv - Excel". The ribbon menu is visible at the top, showing tabs for File, Home, Insert, Page Layout, Formulas, Data, Review, and View. The "Home" tab is selected. The status bar at the bottom indicates the cell address "C12".

	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
7										

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

Format for date and datetime values:

Allow blank values to overwrite existing saved values?

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

Upload your CSV file:
 No file chosen

Data Quality

REDCap™

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Project Bookmarks [Edit](#)

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

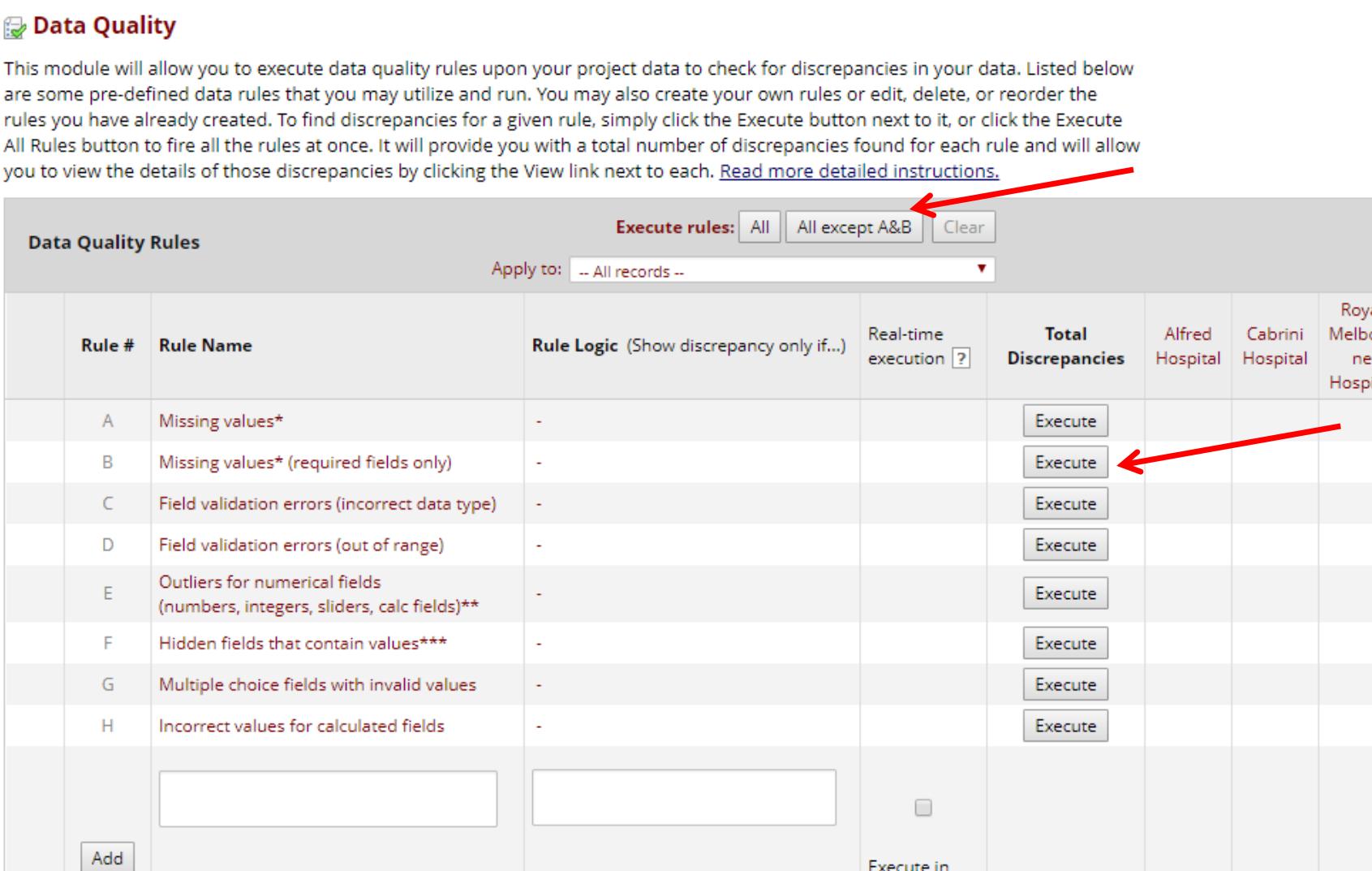
Rule #	Rule Name	Rule Logic (Show discrepancy only if...)	Real-time execution	Total Discrepancies	Alfred Hospital	Cabrini Hospital	Royal Melbourne Hospi
A	Missing values*	-	<input type="checkbox"/>	Execute			
B	Missing values* (required fields only)	-	<input type="checkbox"/>	Execute			
C	Field validation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

Execute rules: [All](#) [All except A&B](#) [Clear](#)

Apply to: [-- All records --](#)

Add

Execute in



Data Quality

Date of birth must not be greater than today's date
datediff([dob],"today","d","dm^y",true) < 0

Add Enter descriptive name for new rule (e.g., Participants below age 18)
Enter logic for new rule (e.g., [age] < 18)
[How do I use special functions?](#)

✓ Valid 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 datediff([dob],"today","d","dm ^y ",true) < 0	dob: 03-10-2018	exclude

Close

Feedback



Help and Resources







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](#).

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

[Log In](#)

[Forgot your password?](#)

REDCap Training Videos

Just Getting Started?

Explore these overviews of fundamental concepts and features.

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

Building a Project

Learn how to build and modify data collection instruments.

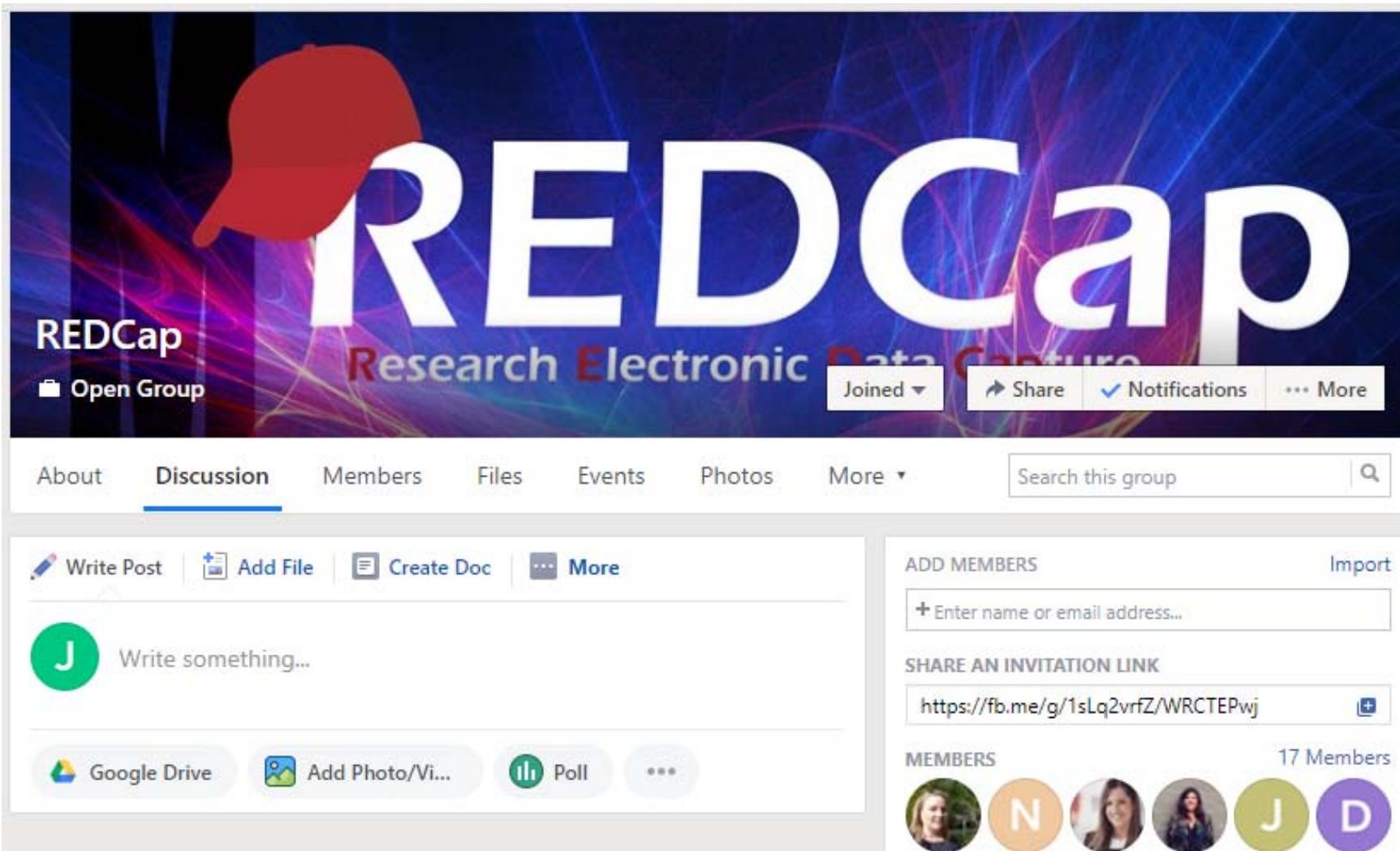
Title	Description	Watch Video
Introduction to	An introduction to the Online Designer and Data Dictionary methods of instrument	

Help Resources

The screenshot shows the REDCap application interface. At the top, there is a navigation bar with links for 'My Projects' and 'REDCap Messenger' (which has a red notification bubble). Below this is a 'Project Home and Design' section with links for 'Project Home' and 'Codebook', and a status message 'Project status: Production'. The main content area is titled 'Data Collection — Royal Prince Alfred Hospital'. It contains sections for 'Record Status Dashboard' (with a link to 'View / Edit Records'), 'Applications' (listing 'Calendar', 'Data Exports, Reports, and Stats', 'Field Comment Log', and 'File Repository'), 'Reports' (with a search bar and organize/edit buttons), and a 'Help & Information' section. The 'Help & Information' section includes links for 'Help & FAQ', 'Video Tutorials', and 'Suggest a New Feature'. Two red arrows point from the text below to the 'Help & FAQ' and 'Video Tutorials' links.

Help & Information

- 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 "REDCap" logo with a red baseball cap icon. Below the logo, the text "Research Electronic Data Capture" is visible. The top navigation bar includes links for "Joined", "Share", "Notifications", and "More". The main menu below the header offers options like "About", "Discussion" (which is currently selected), "Members", "Files", "Events", "Photos", and "More". A search bar is also present. On the left, there's a post area with a placeholder "Write something..." and various sharing options (Google Drive, Add Photo/Vid, Poll). On the right, there's a "ADD MEMBERS" section with an input field for names or emails, a "SHARE AN INVITATION LINK" field containing a URL, and a "MEMBERS" section showing profile icons for 17 members.

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.