



Introduction to REDCap™

EI Leemann

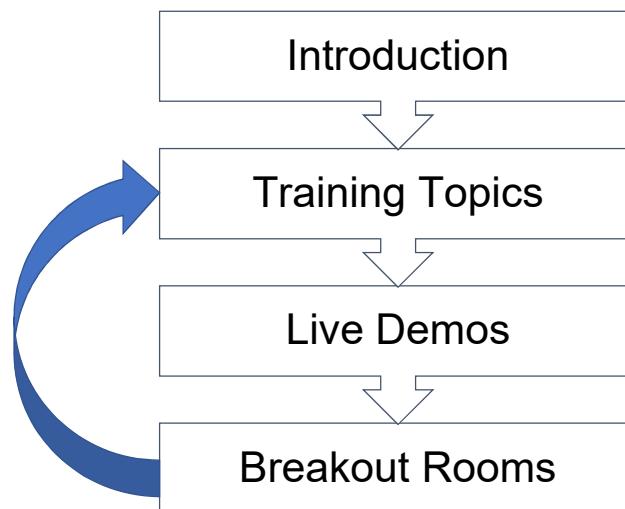
REDCap Administrator

Helix

redcap@monash.edu



Course Approach



History and Background



Who Created REDCap and Who Uses it?

THEN

2004: Developed at Vanderbilt Univ.
2006: Global consortium started
2014: Monash joined

NOW

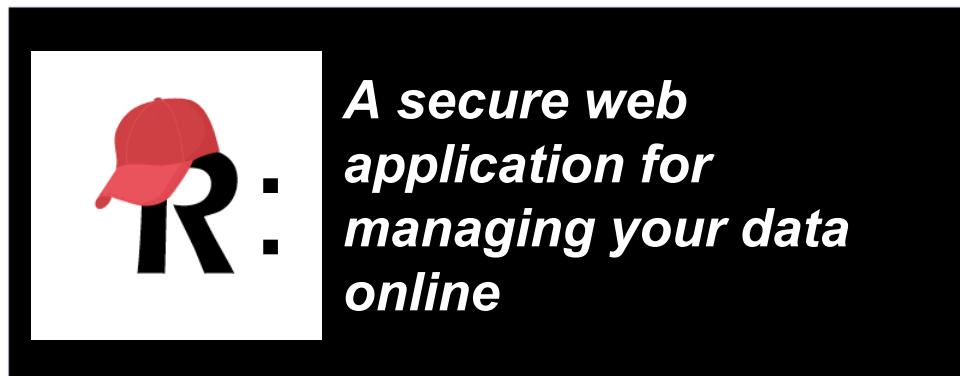
Worldwide:
+5890 institutions /146 countries
+1.3M projects
+2M users
REDCap @ Monash:
+1000 projects
+3700 users



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



What is REDCap?



REDCap Acronym

Research
Electronic
Data
Capture

Redcap
RedCap
Redcap
RedCAP
REDCap ✓

What is it for?

Use Cases



Clinical Research
and Clinical Trials



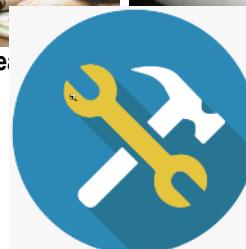
Community Research



Scientific Research



Global Health



Operational Support



Advantages of REDCap

Accessible

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

Customisable

- fast and flexible to design
- modifications at anytime

Accurate

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

Secure

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

Supported

- User group and training



REDCap @Monash

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

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

The screenshot shows the Monash HELIX website with a blue header bar. The main content area has a white background with a sidebar on the left. The sidebar is titled 'Capabilities' and lists several items under 'Monash REDCap', including 'Monash SoRIP', 'CapBook', 'Review - Publishing and Data Transfer', 'Application Development', 'Data Governance', and 'Clinical Trials and Clinical Registry'. The main content area is titled 'Monash REDCap' and contains two sections of text. The first section describes REDCap as a web-based application for collecting data from participants in research studies. It highlights features like secure access and remote, electronic data capture via a web browser or mobile device, and the ability to collect data via various methods (e.g., paper, mobile devices). The second section discusses the integration of REDCap with other systems, mentioning its compatibility with SPSS, SAS, Stata, R, and Python, as well as its use in project calendar, scheduling, reporting, and analysis modules. At the bottom of the main content area, there is a section titled 'Key Features and Benefits' with three bullet points: 'Web-based access (on or off campus)', 'Access to multiple databases', and 'Fast and flexible to design'.

REDCap @Monash

How do I get access to REDCap?

Monash University Research

The P.I. must be from Monash University

<https://redcap.link/monashredcap>

Monash Health Translation Precinct (MHTP) Research

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

<https://redcap.link/mhtpredcap>



REDCap @Monash



and
Individualised Support
(cost recovery basis)



Training Topics

Project Setup

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



Training Topics

Applications & Tools

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



Training project

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

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



Project Setup



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



[Log In](#)

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



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

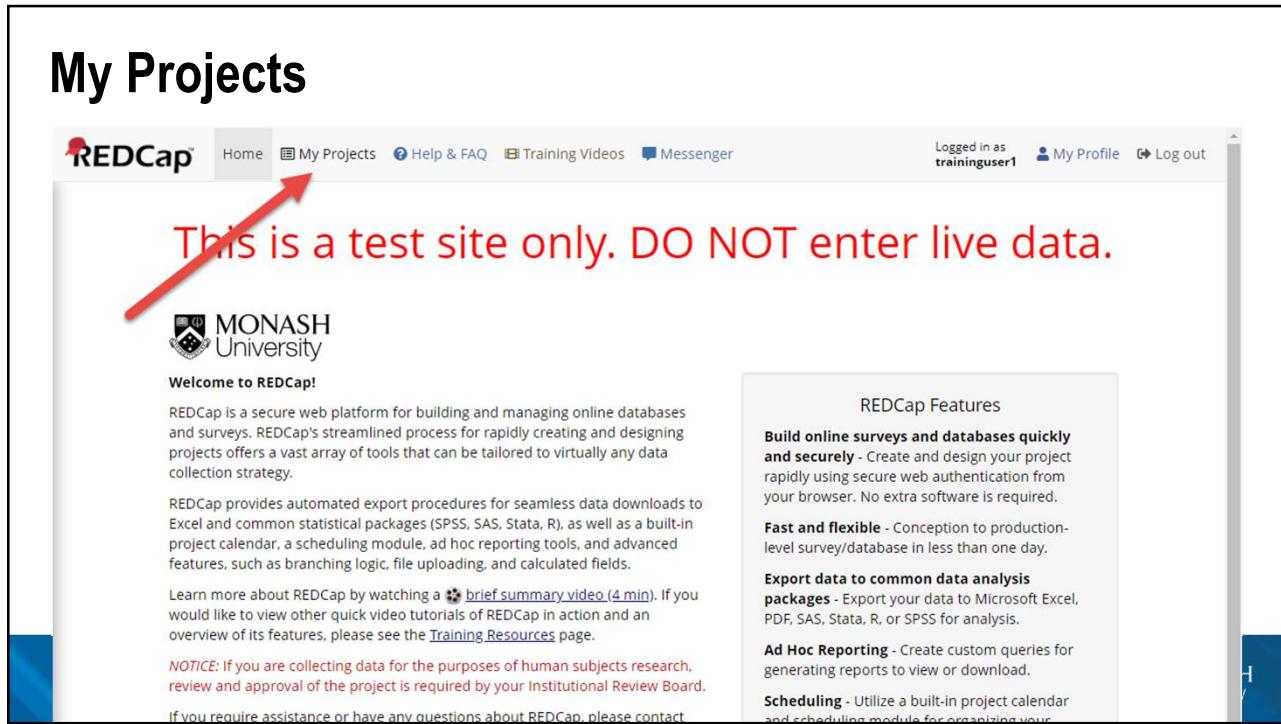
Username:	traininguserXX	←
Password:	*****	←

→ [Forgot your password?](#)



My Projects

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



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.

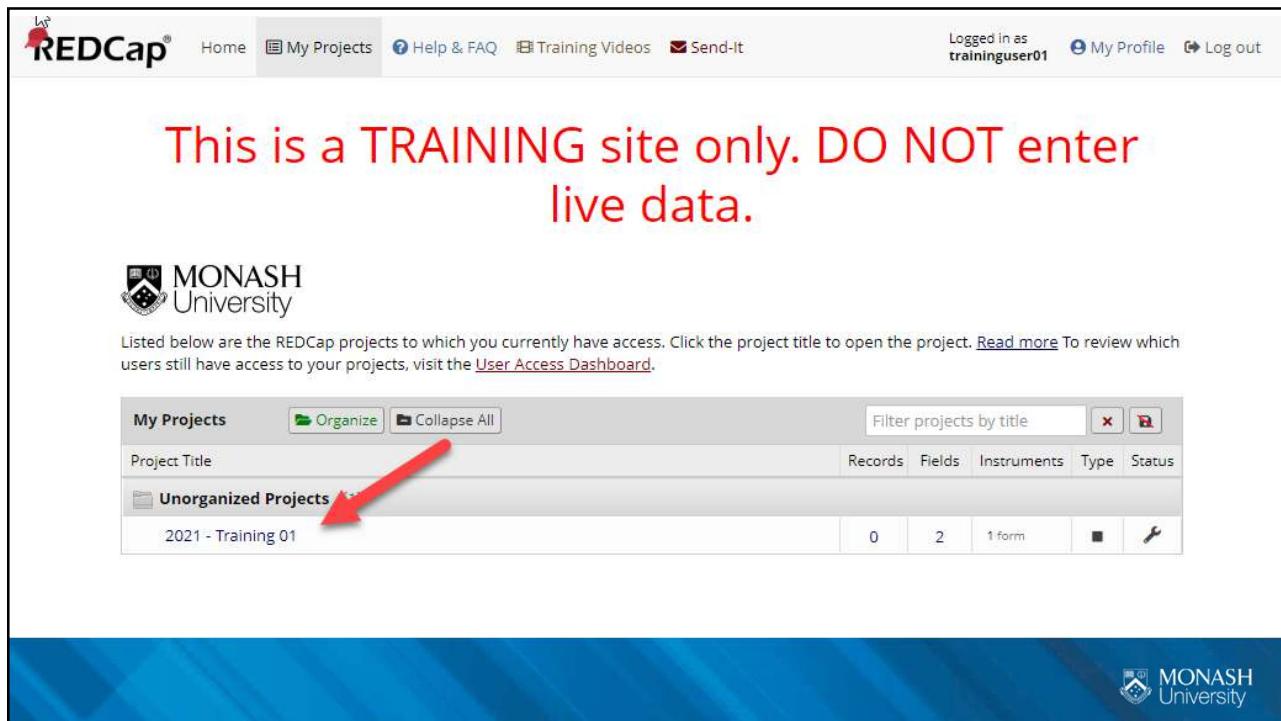
NOTICE: If you are collecting data for the purposes of human subjects research, review and approval of the project is required by your Institutional Review Board.

If you require assistance or have any questions about REDCap, please contact [support](#).

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 work.

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



Welcome to REDCap!

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	Instruments	Type	Status
Unorganized Projects	0	2	1 form		
2021 - Training 01	0	2	1 form		

MONASH University

Monash University

2021 - Training 01 PID: 731

Project status: Development Completed steps 0 of 7

Main project settings

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

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

Learn how to use [Smart Variables](#) [Piping](#) [@ Action Tags](#) [Field Embedding](#) [Special Functions](#)

Enable optional modules and customizations

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

Set up project bookmarks (optional)

Training Site

MONASH University

Online Designer

Project status: Development Completed steps 1 of 8

Main project settings

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

MONASH University

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.

Data Collection Instruments

Add new instrument:

- Create a new instrument from scratch
- Import a new instrument from the official REDCap Instrument Library
- Upload instrument ZIP file from another project/user or external libraries

Instrument name	Fields	View PDF	Instrument actions
My First Instrument	1		 Rename Copy Delete Download instrument ZIP

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.

Data Collection Instruments

Add new instrument:

- Create a new instrument from scratch
- Import a new instrument from the official REDCap Instrument Library
- Upload instrument ZIP file from another project/user or external libraries

Instrument name	Fields	View PDF	Instrument actions
Demographics	1		 Add instrument here
Diagnosis	0		 Add instrument here
My Survey	0		 Add instrument here

Online Designer

The screenshot shows the 'Record ID' field in the main interface. Below it is the 'Add New Field' dialog box. A red arrow points to the 'Add New Field' button in the dialog box. The dialog box contains instructions and a list of field types.

Field Type:

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



Step 2: Online Designer

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

- Action Tags / Field Annotation (optional)**: An arrow points to the 'choose ontology to search...' dropdown.
- Required?**: An arrow points to the radio button for 'Yes'.
- Identifier?**: An arrow points to the radio button for 'Yes'.

The dialog box also includes sections for Variable Name, Validation, Custom Alignment, and Field Note.



Step 2: Online Designer

The screenshot shows the Online Designer interface. On the left, there is a form builder with various fields: Record ID, Date of registration, First name, Last name, DOB, gender, Email, and Age at registration. Each field has associated icons for edit, delete, and import from field bank. On the right, there is a table titled "Instrument: Demographics (demographics)" with the following data:

#	Variable / Field Name	Field Label	Field Attributes (Field Type, Validation, Choices, Calculations, etc.)
1	record_id	Record ID	text
2	reg_date	Date of registration	text (date_dmy), Required
3	first_name	First name	text, Required
4	last_name	Last name	text, Required
5	dob	DOB	text (date_dmy), Required
6	gender	Gender	radio, Required 1 Male 0 Female 99 Other
7	email	Email	text (email), Required
8	age	Age at registration	calc Calculation: datediff([reg_date], [dob], "y")
9	demographics_complete	Section Header: Form Status Complete?	dropdown 0 Incomplete 1 Unverified 2 Complete

University

Design vs Data Entry

The screenshot compares two modes of the application: Design Mode and Data Entry Mode.

Design Mode: The left side shows the form builder with fields: Record ID, Date of registration, First name, Last name, DOB, gender, Email, and Age at registration. Each field has associated icons for edit, delete, and import from field bank.

Data Entry Mode: The right side shows the data entry form with the following fields and validation messages:

- Demographics** section:
 - Record ID: Adding new Record ID 2
 - Date of registration: * must provide value
 - First name: * must provide value
 - Last name: * must provide value
 - DOB: * must provide value
 - gender: * must provide value
 - Email: * must provide value
 - Age at registration: View equation
- Form Status** section:
 - Complete?: Incomplete

Buttons at the bottom include Save & Exit Form, Save & ..., and Cancel.

Data Entry Mode

Monash University
2021 - Training 01 PID 731

Record Status Dashboard (all records)

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

Legend for status icons:

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

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

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

Add new record

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

Record ID	Demographics	Diagnosis	My Survey
1	●	○	○

MONASH University

Calculated Field

Based on Today's date (dynamic)

VS

Based on a fixed date

MONASH University

Edit Field

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

Field Type: Calculated Field 

Field Label: Age Use the Rich Text Editor 

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

How to use:  Smart Variables  Piping  Field Embedding

Required? 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

Field Note (optional): Small reminder text displayed underneath field

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

Test calculation with a record:

Action Tags / Field Annotation (optional): 

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

 Save  Cancel 

Edit Field

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

Field Type: Calculated Field

Field Label: Age Use the Rich Text Editor

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

How to use:  Smart Variables  Piping  Field Embedding

Required? Yes * Prompt if field is blank.

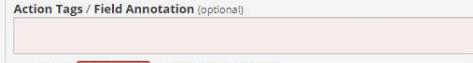
Identifier? No Yes Does the field contain identifying information (e.g., name, SSN, address)?

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

Field Note (optional): Small reminder text displayed underneath field

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

Test calculation with a record:

Action Tags / Field Annotation (optional): 

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

 Save  Cancel 

Breakout Room

Exercise - 12 minutes

Create demographics forms

Age calculation



Step 2: Edit/Copy/Move/Delete Fields

A screenshot of a form editor interface. At the top, there is a toolbar with icons for edit, copy, move, and delete. To the right of the toolbar, the text "Variable: first_name" is displayed. Below the toolbar, there is a field labeled "First name" with a red border around it. To the right of the field is a small input box. Below the input box, the text "* must provide value" is shown in red. The entire interface is set against a light gray background.

Improving Form Layout

Field Embedding

The left screenshot shows a standard form with separate input fields for First Name, Last Name, Date of Birth, Gender, and Email Address. The right screenshot shows the same information where the First Name, Last Name, and Date of Birth fields are embedded into a single composite field.



Improving Form Layout

Field Embedding continued

How to embed a field/s

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

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

The screenshot shows the 'Edit Field' dialog box in a rich text editor. It displays a table structure with variable names {first_name}, {last_name}, and {dob} placed within the cells. The 'Rich Text Editor' button is circled in red.



Improving Form Layout

Design Mode

Current Instrument: Demographics

Record ID

NOTE: This 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: Field is embedded elsewhere on page [3]

Last Name: Field is embedded elsewhere on page [3]

Date of Birth: Today | Daily | Add Field | Add Matrix of Fields

First Name: Last Name: DOB:

Gender: Female Male Other

email address: * must provide value

Form Status: Complete? Complete In Progress

Lock this instrument? Lock

Add Field | Add Matrix of Fields

Data Entry Mode

Demographics

Data Access Group: [No Assignment] [?]

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

Event Name: Baseline

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	DOB: 18-02-1985	<input type="button" value="Today"/> <input type="button" value="D.M.Y."/>
-------------------	------------------	-----------------	--

Gender: Female Male Other

email address:

Form Status: Complete? Complete In Progress

Lock this instrument? Lock

Delete data for THIS FORM only

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



Breakout Room

Exercise - 9 minutes

Field embedding

Step 2: Branching Logic

Current instrument: **Diagnosis**

[Preview instrument](#)

Comorbidities
* must provide value

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

If Other, please specify
* must provide value

MONASH University

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'

Test logic with a record [- select record ...](#)

[Clear logic](#)

— 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](#)

MONASH University

Step 2:
Branching Logic

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: comorb

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**

Action Tags (self)

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. For an overview of the different field types available, you may view the [Field Types video \(4 min\)](#).

Field Type: Multiple Choice - Radio Buttons (Single)

Field Label: Gender

Choices (one choice per line): 1. Male, 0. Female, 99. Other

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

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

@ Action Tags

Action Tags are an excellent way to customize the data entry experience for surveys and forms. They are special terms that begin with the '@' sign that can be placed inside a field's Field Annotation when adding or editing a field. Each action tag has a corresponding action that is performed for the field when displayed on data entry forms and survey pages. Below is a comprehensive list of all available action tags that you may use. You can use as many as you want for a single field, but if you do use more than one tag for a field, make sure to put a space or line break between them. Because the action tags are used as part of the Field Annotation, they are not displayed anywhere on the page. To start using Action Tags, navigate to the Online Designer In a project and when adding or editing a field, add the tag into the Action Tag/Field Annotation text box in the Edit Field popup.

All available action tags and their descriptions:

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

ONASH University

Breakout Room

Exercise - 12 mins

Create diagnosis form

Branching Logic

Action Tags



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](#)

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

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

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

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

Self study material*

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

Steps for making project changes:

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

Upload your Data Dictionary file (CSV file format only)

Format for min/max validation values for date and datetime fields: DD/MM/YYYY or YYYY-MM-DD

Choose the delimiter for the uploaded file: [Comma \(,\)](#)

[Choose file](#) No file chosen [Upload File](#)



Longitudinal Study: Define Events

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

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

Use longitudinal data collection with defined events? [VIDEO: How to create and manage a survey](#)

MONASH University

Longitudinal Study: Define Events

Project Home Project Setup Other Functionality Project Revision History

Project status: Development Completed steps 2 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? [VIDEO: How to create and manage a survey](#)

Design your data collection instruments

Complete!

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 complete?

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

In progress

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

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

MONASH University

Longitudinal Study: Define Events

[Project Setup](#) [Define My Events](#) [Designate Instruments for My Events](#)

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

STEP #1:
To add new events below, provide an **Event Name** for that event, and then click the *Add new event*. Once events have been added, you can easily change their order by dragging and dropping the event using the up-down arrow icon on the far left for a given row in the table.

STEP #2:
Once you have defined your events on this page, you may navigate to the [Designate Instruments for My Events](#) page, where you may select which data collection instruments that you wish to utilize for each event you defined.

Upload or download arms/events				
Arm 1: Arm 1		+Add New Arm		
Arm name: Arm 1 Rename Arm 1				
	Event #	Event Name	Custom Event Label <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

MONASH University

Longitudinal Study: Define Events

[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.

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

MONASH University

Enable Optional Modules/Customisations

Optional

Enable optional modules and customizations

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

[Additional customizations](#)



Auto Numbering vs Self Numbering

Add / Edit Records

You may view an existing record/response by selecting it from the drop-down lists below. To create a new record, enter information in the text box below and hit Tab or Enter. To quickly find a record without using the drop-downs, the text box contains existing record names as you begin to type in it, allowing you to select it.

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

Auto Numbering Mode

Choose an existing Record ID [-- select record --](#)

[+ Add new record](#)

Data Search

Choose a field to search (excludes multiple choice fields) [All fields](#)

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

Add / Edit Records

You may view an existing record/response by selecting it from the drop-down lists below. To create a new record, enter information in the text box below and hit Tab or Enter. To quickly find a record without using the drop-downs, the text box contains existing record names as you begin to type in it, allowing you to select it.

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

Self Numbering

Total records: 1

Choose an existing Record ID [-- select record --](#)

Enter a new or existing Record ID

Data Search

Choose a field to search (excludes multiple choice fields) [All fields](#)

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



Enable Optional Modules/Customisations

Optional

Enable optional modules and customizations

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

I'm done!

Additional customizations

MONASH
University

Step 4: Enable optional Modules/Customisations

Additional customizations

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

Set a Custom Record Label
You may append other data and/or static text to any record name (e.g., Study ID) as the record is displayed on your data collection instruments, such as inside the drop-down lists when choosing a record and at the top of the page after being selected. Simply provide the text you wish to display below, and place any variable names inside square brackets [] which the data collected for those variables for that record will replace the variable in the text.
Custom Record Label:
Example: If [[last_name]] were entered, then for record '102' it would display '102 (Doe, Jon)'.

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

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

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

Record ID 1

Data Collection Instrument	Follow-up 3 Months	Follow-up 6 Months
Demographics		
Diagnosis		
Questions		
data on event:		

Record Home Page

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

Choose action for record

Record ID 1 John Liman

Data Collection Instrument	Status
Demographics	
Diagnosis	
My Survey	

MONASH University

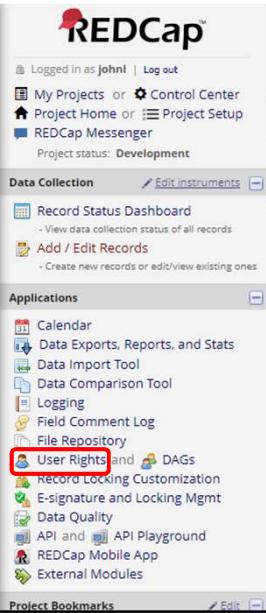
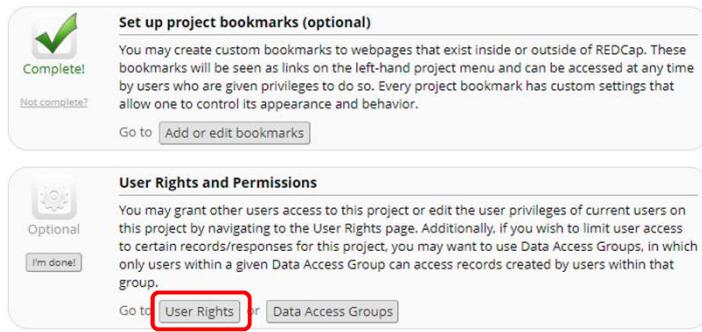
Breakout Room

Exercise - 10 mins

- Create events
- Designate instruments to the events
- Auto-numbering vs Self numbering
- Customise label

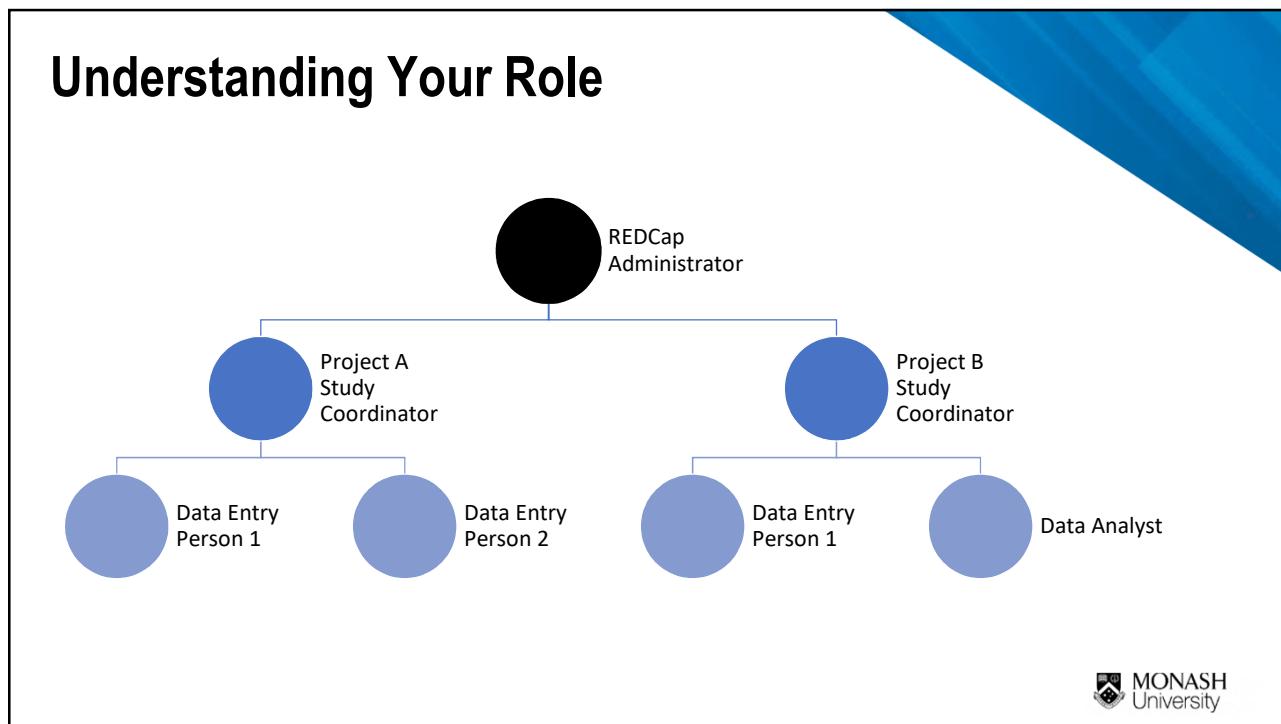


User Rights and Permissions

 OR 

The screenshot shows the REDCap dashboard. On the left, there's a sidebar with links like 'Data Collection', 'Applications', and 'Project Bookmarks'. In the main area, there are two callout boxes. The top one is titled 'Set up project bookmarks (optional)' and contains text about creating custom bookmarks. The bottom one is titled 'User Rights and Permissions' and contains text about granting access to the project. Both boxes have 'Optional' and 'I'm done!' buttons. At the bottom of the 'User Rights and Permissions' box, there are buttons for 'User Rights' and 'Data Access Groups', with 'User Rights' also highlighted with a red box.





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) [No users assigned]	never	✓	✓	✓	Full Data Set	✓	✓
Data Collector	[No users assigned]		✗	✗	✗	✗	✓	✓
Project Manager	[No users assigned]		✓	✓	✓	Full Data Set	✓	✓

MONASH University

The screenshot shows the REDCap Project Home interface. On the left, the 'Data Collector' section is expanded, showing 'Record Status Dashboard' and 'Add/Edit Records'. In the center, a 'Creating new role' dialog box is open for a role named 'Secret'. The dialog box contains sections for 'Basic Rights', 'Data Viewing Rights', and 'External Modules: Configuration Permissions'. A red callout box with the text 'Refer to the Help & FAQ for the definitions of each access' points to the 'Data Viewing Rights' section.

User Role

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

The screenshot shows the 'User Rights' section of the REDCap interface. It highlights two problematic approaches: 1) Directly assigning a user ('johnl') to a role without creating a role first. 2) Creating a role ('Data Collector') but failing to assign any users to it. A red arrow points from the 'johnl' entry in the 'Data Collector' row to the 'Assign to role' dropdown. Another red arrow points from the 'Data Collector' row to the 'Create role' button.

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) [No users assigned]	never	✓	✓	✓	Full Data Set	✓	✓
Data Collector	[No users assigned]		✗	✗	✗	✗	✓	✓
Project Manager	[No users assigned]		✓	✓	✓	Full Data Set	✓	✓

MONASH University

Assign User to Role

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

— 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 at <https://redcap.link/monashredcapaccount>

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

 MONASH University

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
-
- 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

 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

 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

 MONASH University

Data Access Group

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

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

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

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

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

[Add Group](#)

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

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

Data Access Groups	Users in group	Number of records in group	Unique group name	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			



Breakout Room

Exercise 7 mins

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



Test Your Project!!



[Complete!](#)

[Not complete?](#)

Test your project thoroughly

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



Step 8: Move to Production



[Not started](#)

Move your project to production status

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

Go to [Move project to production](#)

Move Project To Production Status?

x

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](#)



Application and Tools



Record Status Dashboard

REDCap™

Logged in as JohnI | Log out

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

Data Collection Edit Instruments

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

Applications

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

Project Bookmarks Edit

Record Status Dashboard (all records)

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

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

Legend for status icons:

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

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

Record ID	Baseline Demographics	Diagnosis	Follow-up 3 Months	Follow-up 6 Months
1 (Email john.liiman@monash.edu) John Doe	Green	Grey	Grey	Grey
2 (Email christopher.robyn@monash.edu) Christopher Robyn	Green	Red	Grey	Grey
3 (Email sumbd@monash.edu) Sum Bar Dee	Red	Grey	Grey	Grey

MONASH University

Project Log/Audit Trail

REDCap™

Logged in as johnl | Log out

My Projects or Control Center

Project Home or Project Setup

REDCap Messenger

Project status: Development

Data Collection Edit Instruments

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

Applications

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

Project Bookmarks Edit

Logging

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

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

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)	comorbid1 = 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',

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

MONASH University

Field Data History

DOB
* must provide value

Gender
* must provide value

Email
* must provide value

02-10-1999 Today D-M-Y

Male Female

sum.bd@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

MONASH University

Data Exports

Data Exports, Reports, and Stats

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.

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			

My Reports & Exports

Project Bookmarks

MONASH University

Create New Reports

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.

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

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

[Quick Add](#) Add all fields from selected instrument: [-- choose instrument --](#)

MONASH University

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?"	Operator / Value	= 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**

MONASH University

Create New Reports

Project status: Development

Data Collection [Edit instruments](#)

- 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 [Edit](#)

- Another REDCap project

Reports [Edit reports](#)

- Ready for Follow-Up

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

Stats & Charts **Export Report** **Print Page** **Edit Report**

Live filters: [Data Access Group]

Breakout Room

10 mins

Reports



Data Dictionary Codebook

Project Home Project Setup Other Functionality Project Revision History

Quick Tasks

- Codebook** (highlighted with a red box)
- Export data
- Create a report
- Check data quality
- User Rights
- Online Designer and Data Dictionary Upload
- Copy this project
- Data Access Groups

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.



Data Dictionary Codebook

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

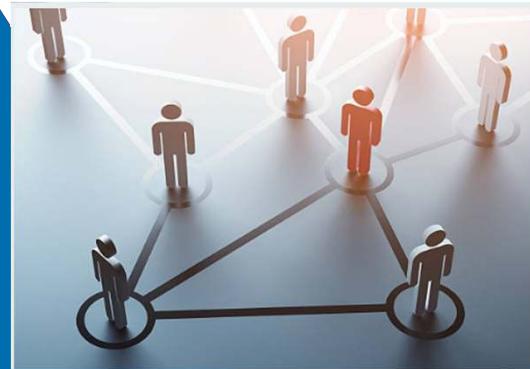
The Codebook is a human-readable, read-only version of the project's Data Dictionary and serves as a quick reference for viewing the attributes of any given field in the project without having to download and interpret the Data Dictionary. Note: Checkbox fields have their coded values displayed both 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](#)

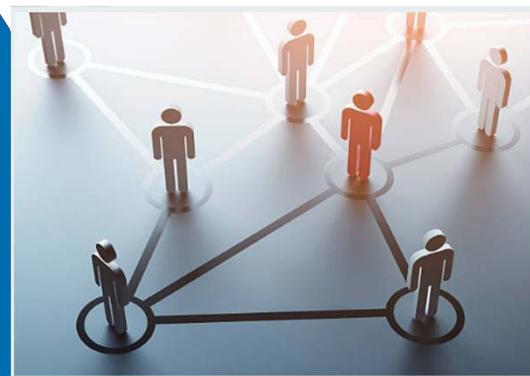
Data Dictionary Codebook

#	Variable / Field Name	Field Label Field Note	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				

Feedback



Help and Resources



REDCap®

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:
 Password:
 [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 interface with a sidebar menu. The 'Help & Information' section is expanded, displaying three items: 'Help & FAQ', 'Video Tutorials', and 'Suggest a New Feature'. Two red arrows point to the first two items in this list.



REDCap Group @Workplace

MONASH University

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.

MONASH University