


# Project Setup Page- REDCap – How-To Guide

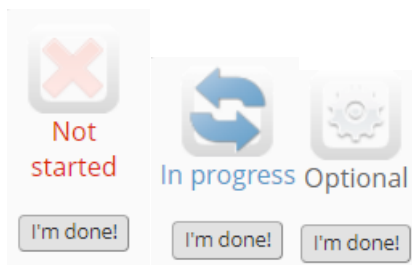
## Project Setup Page

The **Project Setup Page** is designed as a checklist to help users get started on their projects. The page details the **Project status**, and up to eight steps users should follow in order to create their projects exactly as they like before requesting a move to production.

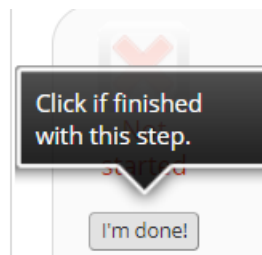
**Project status:**  Development

Completed steps **0** of **8**

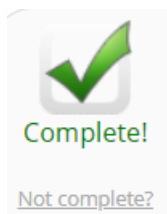
Each step has an icon to the left that will reflect the status of the task.



Once the step is completed, the user can click *I'm done!*




This will mark the step complete. (By clicking *Not complete?*, this can be reverted back if necessary)



It's good practice to go through each section and mark the steps complete to help ensure a total evaluation of the project's setup. The eight steps REDCap would like you to review are as follows:

## Step 1

  
Not started

### Main project settings

Disable

✔ Use surveys in this project? [?](#)

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

Disable


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


I'm done!

Modify project title, purpose, etc.

The **Main project settings** allow you to select whether the project utilizes surveys or supports longitudinal data collection. In this section, you can update the project's title, type, and notes.

## Step 2


  
Not started




### Design your data collection instruments & enable your surveys

Add or edit fields on your data collection instruments (survey and forms). This may be done by either using the Online Designer (online method) or by uploading a Data Dictionary (offline method). You may then enable your instruments to be used as surveys in the Online Designer. Quick links: [Download PDF of all instruments](#) OR [Download the current Data Dictionary](#)


Go to

 Online Designer

or

 Data 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](#)


I'm done!


This step provides users with links to the project's **Online Designer** and **Data Dictionary**. These pages are used to build and edit the project's data collection instruments. Users can also explore the **REDCap Instrument Library** which acts as a shared repository for instruments created by REDCap partners. These instruments can be created within the project.

In addition to linking to helpful notes on REDCap's most used features (i.e. Smart Variables, Piping, Action Tags, Field Embedding, and Special Functions), this section provides a link to a module that will help you tag identifiers. All identifiers must be marked before a project is moved to production.

[Check For Identifiers](#)

## Step 3

  
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!

If a project is longitudinal, you'll use this step to define events and select which instruments belong to one or more events.

## Step 4



Optional

I'm done!

### ⚙️ Enable optional modules and customizations

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Modify

✔️ Repeatable Instruments and events ?

Disable

✔️ Auto-numbering for records ?

Disable

✔️ Scheduling module (longitudinal only) ?

Enable

❌ Randomization module ?

Enable

❌ Designate an email field for communications (including survey invitations and alerts) ?

🔗 Additional customizations

Settings displayed to Administrators only:

Enable

❌ Clinical Data Pull from AHEpic ?

Enable

❌ Twilio SMS and Voice Call services for surveys and alerts ?

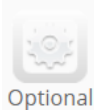
This step is highly involved with customizing the project based on special and specific features, including selecting whether the following are enabled:

- repeatable instruments and events
- the scheduling module
- randomization
- an email field for invitations and alerts
- clinical data pulls
- Twilio

With additional customizations, you can also select or enable:

- whether records will automatically be provided a record ID or manually named
- custom record labels
- secondary unique fields
- record order by fields
- the field comment log or the data resolution workflow
- PDF customizations
- missing data codes
- data history
- file version history for file upload fields
- Today/Now button
- how branching logic operates
- reasons for updating records
- protected email mode
- the data entry trigger

Step 5



Optional

I'm done!

### Set up project bookmarks (optional)

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

Go to [Add or edit bookmarks](#)

Bookmarks to webpages can be setup within the project.

## Step 6



Optional

I'm done!

### 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](#)

User rights will need to be provided for every user working within the project. Each user should be given rights appropriate to their role within the project; permissions for special features should be limited to the users who need them. Data access groups can also be selected within this step.

## Step 7



Not started

I'm done!

### 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.

Ideally, all projects in development should be tested with a minimum of 10 records before moving to production. This will decrease the chances for needing to make changes to the project while in production. It will also help users to determine if their projects are setup in the most efficient and relevant way. Test records should be regularly cleared to help maintain the database.

## Step 8



Not started

### Move your project to production status

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

Go to [Move project to production](#)

Once your project is ready and tested, it's time to move it to production! The final step of the **Project Setup** page allows users to request that their projects are moved to production. After the request is made, a REDCap administrator will review your project design for appropriate use, project security, and policy compliance.