Text, logo

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**Beginner - Project Setup Page**

**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.



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

Icon

Description automatically generated with low confidenceGraphical user interface, text, application

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Description automatically generated

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

Diagram

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

Logo

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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 1Graphical user interface, text, application, email

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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

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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.



Step 3

Graphical user interface, text, application

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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

Graphical user interface, text, application

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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

Text

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Bookmarks to webpages can be setup within the project.

Step 6

Graphical user interface, text, application

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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

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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

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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.