



Session 3: Build a project from scratch

Biostatistics Research and Support Unit (BRU)

IGTP

November, 2025

User Rights and DAGs

1. User Rights
1. DAGs



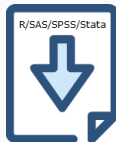
Data visualization

1. Reports
2. View all available data
3. View a subset of the data



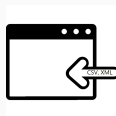
Data exports

1. Export
2. Formats
3. Confidentiality and Data Protection
4. Advanced options
5. Additional options



Data import

1. Access
2. Formats
3. CSV/EXCEL import



User Rights and DAGs

User Rights and DAGs

1. User Rights



Definition



Access



Functionalities



Access to the project



Rights



Visualization

2. DAGs



Definition



Access



Functionalities

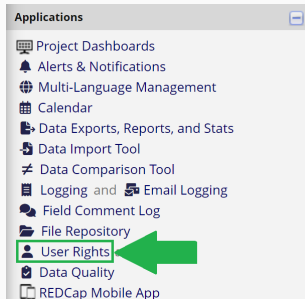


Definition

They are used to grant users access to a project and manage personalised privileges and rights.

Access

They can be found in the Project setup




Functionalities

- Grant access to users
- Define user rights
- View user table:


Upload or Download Users ?

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

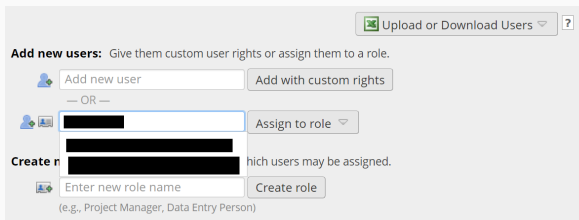
(e.g., Project Manager, Data Entry Person)

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
—		never	✓	✓	✓

Access to the Project

Steps to give a user access to your project:

1. Create the user in the institution's REDCap:
 - This step is only necessary if the user has never been registered in the institution's REDCap.
 - An email address is required.
 - Only administrators can create users.
2. Assign the user to the project using the "Add new users" function:



The screenshot shows the 'Add new users' interface in REDCap. At the top right, there is a button labeled 'Upload or Download Users' with a dropdown arrow and a help icon. Below this, the text 'Add new users: Give them custom user rights or assign them to a role.' is displayed. The interface is divided into two main sections by an 'OR' separator. The first section, 'Add new user', includes a text input field and a button labeled 'Add with custom rights'. The second section, 'Assign to role', includes a text input field (containing a redacted name), a dropdown menu labeled 'Assign to role', and a button labeled 'Create role'. Below the 'Assign to role' section, there is a text input field labeled 'Enter new role name' and a button labeled 'Create role'. A note at the bottom states '(e.g., Project Manager, Data Entry Person)'.

User Rights



REDCap allows you to customize user rights for each project. There are two options for setting rights:

1. **Individually** .

Add new users >> Search user>> Add with custom rights and define the rights you want the user to have.

2. **Roles**: This is useful when multiple users require the same set of rights. This allows you to quickly assign users to a predefined role.

Create new roles >> Write name of the role >> Create role and define which rights this role will have.

A screenshot of the REDCap User Rights management interface. At the top right, there is a button labeled "Upload or Download Users" with a green icon and a question mark. Below this, the text "Add new users: Give them custom user rights or assign them to a role." is displayed. The interface is divided into two main sections. The first section, "Add new user", has a text input field and a button labeled "Add with custom rights". Below this is a separator "— OR —". The second section, "Assign to role", has a text input field with a dropdown arrow and a button labeled "Assign to role". Below this is another separator "— OR —". The third section, "Create new role", has a text input field and a button labeled "Create role". Below this is a text input field for the role name, followed by the text "(e.g., Project Manager, Data Entry Person)".

Permissions

Rights can be grouped into three types:

1. Basic Privileges
2. Privileges for Viewing and Exporting Data
3. External modules rights

User Rights



Rights

1. **Basic Privileges:** Refer to general project-level access. For example: creating/renaming/deleting records, accessing statistics, etc.

Basic Privileges

Expiration Date
(If applicable)

(M-D-Y)

Highest level privileges:

Project Design and Setup

☐

User Rights

☐

Data Access Groups

☐

Other privileges:

Alerts & Notifications

☐

Calendar

☒

Add/Edit/Organize Reports
Also allows user to view ALL reports (but not necessarily all data in the reports)

☒

Stats & Charts

☒

Data Import Tool

☐

Data Comparison Tool

☐

Logging

☐

File Repository

☒

Data Quality
[What is Data Quality?](#)

☐ Create & edit rules
☐ Execute rules

API
[What is the REDCap API?](#)

☐ API Export
☐ API Import/Update

Settings pertaining to the REDCap Mobile App:

REDCap Mobile App
[What is the REDCap Mobile App?](#)

☐ Allows user to collect data offline in the mobile app

☐ Allow user to download data for all records to the app?

☐

Settings pertaining to project records: [Explain these settings](#)

Create Records

☒

Rename Records

☐

Delete Records

☐

* Includes ability to delete all data on an instrument or on a repeating event.

Settings pertaining to record locking and E-signatures:

Record Locking Customization

☐

Lock/Unlock Records (instrument level)

☒ Disabled

☐ Locking / Unlocking

☐ Locking / Unlocking with E-signature authority
[What is an E-signature?](#)

Watch video about locking

Lock/Unlock *Entire* Records (record level)

☐

NOTE: It is important to note that instrument level locking and record level locking are independent features that are governed by separate user privileges (as seen above). You must have explicit permission to either one in order to perform that specific locking action. Also, record locking is a higher-level locking than instrument locking, which means that an entire record may be locked or unlocked while one or more instruments are currently locked, but an instrument cannot be locked or unlocked while the entire record is locked.

Rights

2. **Privileges for Viewing and Exporting Data:** Refer to access for specific instruments within the project. The rights are divided into:
 1. Visualization rights
 2. Data export rights

These rights are entirely independent of one another.

Privileges for Viewing and Exporting Data

Data Viewing Rights pertain to a user's ability to view or edit data on pages in the project (e.g., data entry forms, reports). Users with 'No Access' Data Viewing Rights for a given instrument will not be able to view that instrument for any record, nor will they be able to view fields from that instrument on a report. Data Export Rights pertain to a user's ability to export data from the project, whether through the Data Exports page, API, Mobile App, or in PDFs of instruments containing record data. Note: Data Viewing Rights and Data Export Rights are completely separate and do not impact one another.



Rights

2.1 Visualization rights:

Allow an instrument to be:

- Completely hidden
- Viewed only
- Viewed and edited

	Data Viewing Rights		
	No Access (Hidden)	Read Only	View & Edit
Demography	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>



Rights

2.2. Data export rights:

Ability to export data from an instrument:

- Not allowed
- Remove all free text fields, dates, and identifiers
- Remove fields marked as identifiers
- Full data export

Data Export Rights			
No Access	De-Identified*	Remove All Identifier Fields	Full Data Set
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>



3. External modules rights:

This allows you to specify whether users can configure or modify the settings of an external enabled module in the project.

External Modules: Configuration Permissions

Privileges may be defined regarding whether the user can set or modify the configuration of an External Module that has been enabled on this project. Below are the currently enabled modules. NOTE: Only administrators may modify the module configuration permissions here.

- ☒ Auto Record Generation*
- ☒ Form Field Tooltip Module*
- ☒ REDCap CSS Injector*
- ☒ Save Randomization Date*
- ☒ Shazam*

*Permissions based on user's Project Design/Setup rights



Remarks

- The following are the currently enabled modules
- Only administrators can modify external module configuration permissions
- Depend on the user's basic project rights



User visualizations

The **user table's** shows all users in your project along with their individual rights or assigned roles.

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 date to edit)	Data Access Group (click DAG to assign user)	Project Design and Setup	User Rights	Data Access Groups
—	[REDACTED]	never	—	✓	✓	✓
—	[REDACTED]	never	Hospital 1	✗	✗	✗



Definition

DAGs (Data Access Groups) are used to limit access to specific records. Only users assigned to a particular DAG can access records created by users within the same group.

DAGs are useful for multicenter projects, as they ensure that users from one centre cannot access data from another centre.



Remarks

- For data security reasons, your user account does not have access to the User Rights section.

Access

They are found in the Project setup



Functionalities


Create DAGs

Add users to a DAG

DAG table

DAG Switcher

Allows to add a user to more than one DAG

 Upload or download DAGs/User-DAG assignments

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

Assign user to a group: Users may be assigned to any data access group. To assign users to multiple groups, use the DAG Switcher at the bottom.

Assign user to

Data Access Groups	Users in group	Number of records in group	Unique group name (auto-generated)	Group ID number	Delete group?
[Not assigned to a group]	* Can view ALL records	1			

DAG Switcher: Enable multiple Data Access Groups for users

Display options:
☒ Rows are DAGs
☐ Rows are Users

Users assigned to Data Access Groups (DAGs) can optionally be assigned to multiple *potential* DAGs, in which they may be given the privilege of switching in and out of specific DAGs on their own whenever they wish. To assign a user to multiple DAGs, check the checkboxes below for that user. At least two DAGs must be checked for a user in order for them to use the DAG Switcher. NOTE: This does not override a user's current DAG assignment, as set above or on the User Rights page.

Data visualization

Data visualization

1. Reports



Definition

2. View all available data



Definition



Access



Visualization



Functionalities

3. View a subset of the data



Definition



Access



Visualization



Functionalities



Activity



Definition

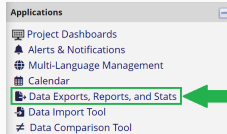
Reports in REDCap allow you to view the data in real time, either in table format or as basic descriptive and graphical statistics. You can:

- View **all available data**.
- Create custom reports to view a **personalised selection of the data**.


View all available data

Access

1. Project setup
2. Data Exports, Reports, and Stats.



3. All data » View report

My Reports & Exports		
	Report name	View/Export Options
A	All data (all records and fields)	 View Report Export Data Stats & Charts



Visualization

The fields are the columns and the individual records are the rows.

Number of results returned: 3

Total number of records queried: 3

Report execution time: 0 seconds

Stats & Charts

Export Data

Print Page

Live filters: [Record ID]

All data (all records and fields)

Search

Record ID record_id	Weight weight	Height height	Registry creation date date_registry	Date of birth date_birth	Sex sex	Medication medication	BMI bmi	Age age	Age > 65 age_65	Hypertension hta	COPD copd	Diabetes mellitus dm	Complete? basic_demography_form_complete
1	60	150	10-05-2024	18-05-1994	Male (1)	Anticoagulants (1)	27	29	0	Yes (1)	No (0)	No (0)	Incomplete (0)
2									0				Unverified (1)
3									0				Complete (2)



Functionalities

- You can sort the table by the value of a variable using the tabs on the side of the field.

Record ID record_ id	Weight weight	Height height	Registry creation date date_ registry	Date of birth date_ birth	Sex sex	Medication medication	BMI bmi	Age age
1	60	150	10-05-2024	18-05-1994	Male (1)	Anticoagulants (1)	27	29
2								
3								

Functionalities

- Access the *Stats & Charts* module to obtain basic and graphical descriptions.

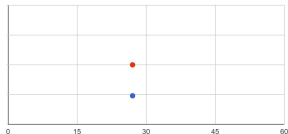
Numerical variables: Basic descriptive statistics and dot plots.

BMI (bmi) [Refresh Plot](#)

Total Count (N)	Missing*	Unique	Min	Max	Mean	StDev	Sum	Percentile						
								0.05	0.10	0.25	0.50 Median	0.75	0.90	0.95
1	2 (66.7%)	1	27	27	27	nan	27	27	27	27	27	27	27	27

Lowest values: 27

Highest values: 27



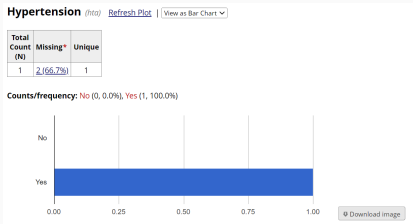
 Download image



Stats & Charts also provides links to records with missing data, and to those with the highest and lowest values.

Functionalities

Categorical variables: Frequencies and bar graphs.



Stats & Charts provides links to records with missing values.

View a subset of the data

Access

1. Project setup
2. Data Exports, Reports, and Stats.



3. Create New Report

My Reports & Exports					
	Report name	View/Export Options	Management Options	Report ID (auto-generated)	Unique report name (auto-generated)
A	All data (all records and fields)	View Report Export Data Stats & Charts			
B	Selected instruments (all records)	Make custom selections			
	+ Create New Report				

View a subset of the data

Functionalities

- **Fields:** Select which fields will be displayed in your report. You can add as many fields as you want.

STEP 2

Fields to include in report [+ Quick Add](#) Add all fields from selected instrument: -- choose instrument --

Field 1	<input type="text" value="record_id 'Record ID'"/>	<input type="button" value="v"/>	Instrument: Demography	<input type="button" value="X"/>
Field 2	<input type="text" value="Type variable name or field label"/>	<input type="button" value="v"/>	Instrument:	

Additional report options (optional)

☐ Combine checkbox options into single column of only the checked-off options (will be formatted as a text field when exported to stats packages)

☒ Remove line breaks/carriage returns from all text data values (only applicable for CSV Raw and CSV Label data exports)

In the report header, display the field label, variable, or both (not applicable for exports)? Both

In the report's data, display the field label, raw data value, or both for multiple choice fields (not applicable for exports)? Both

- **Filters:** you can filter the data in different ways, including complex logic and/or dynamic filters.

STEP 3

[How to use filters and AND/OR logic](#)

Filters (optional) Operator / Value

Filter 1	<input type="text" value="Type variable name or field label"/>	<input type="button" value="v"/>	=	<input type="text"/>
----------	--	----------------------------------	---	----------------------

[Switch format: Use advanced logic](#)

Live Filters (optional) Live Filters can be selected on the report page for dynamically filtering data in real time. With the exception of the Record ID field, 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	-- select a field --
Live Filter 2	-- select a field --
Live Filter 3	-- select a field --



Functionalities

- **Order:** you can sort the report according to selected fields.

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 ▼



Activity: Construction of a personalised report

Create a report named *BMI - females*. The report should display only the identifier and BMI of female participants. It must be visible to all project users and sorted from lowest to highest BMI.

View a subset of the data

Solution

1. Report name: BMI - females

Name of Report:	BMI - <u>females</u>
Set as "public":	Enabling this feature below will auto-generate a public link for viewing the report without needing to log in to REDCap. <input type="checkbox"/> Report is publicly viewable by anyone with the public link
Description (optional): <small>Displayed on page below report name.</small>	<div>Paragraph ▾ B <i>I</i> <u>U</u> A ▾ </div> <div> </div> <div></div>

2. User access: All users

STEP 1	
User Access: Choose who can edit and view this report	
View Access: Choose who sees this report on their left-hand project menu ?	
<input checked="" type="radio"/> All users	- OR - <input type="radio"/> Custom user access (Choose specific users, roles, or data access groups who will have access)
<hr/>	
Edit Access: Choose who can edit, copy, or delete this report (requires user to have 'Add/Edit/Organize Reports' privileges)	
<input checked="" type="radio"/> All users	- OR - <input type="radio"/> Custom user access (Choose specific users, roles, or data access groups who will have access)

View a subset of the data

Solution

3 Fields: Record ID and BMI

STEP 2

Fields to include in report [+ Quick Add](#) Add all fields from selected instrument: [--choose instrument--](#)

Field 1	record_id "Record ID"	[icon]	Instrument: Demography	×
Field 2	bmi "BMI"	[icon]	Instrument: Demography	×
Field 3	-- select a field --	[icon]		

Additional report options (optional)

☐ Combine checkbox options into single column of only the checked-off options (will be formatted as a text field when exported to stats packages)

☒ Remove line breaks/carriage returns from all text data values (only applicable for CSV Raw and CSV Label data exports)

In the report header, display the field label, variable, or both (not applicable for exports)? [Both](#)

In the report's data, display the field label, raw data value, or both for multiple choice fields (not applicable for exports)? [Both](#)

4 Filters: Females

STEP 3

Filters (optional) [How to use filters and AND/OR logic](#)

Operator / Value

Filter 1	sex "Sex"	[icon]	=	Female	×
AND					
Filter 2	-- select a field --	[icon]			

[Switch format: Use advanced logic](#)

Live Filters (optional)

Live Filters can be selected on the report page for dynamically filtering data in real time. With the exception of the Record ID field, 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	-- select a field --
Live Filter 2	-- select a field --
Live Filter 3	-- select a field --




View a subset of the data

Solution

5 Order: from lowest to highest BMI

STEP 4

↓↕ Order the Results (optional)

First by	<input type="text" value="bmi 'BMI'"/>		Ascending order ▼
Then by	<input type="text" value="Type variable name or field label"/>		Ascending order ▼
Then by	<input type="text" value="Type variable name or field label"/>		Ascending order ▼

Data exports

Data exports

1. Export



Access



Functionalities

2. Formats



Options



Activity

3. Confidentiality and Data Protection



Definition



Options

4. Advanced options



Definition

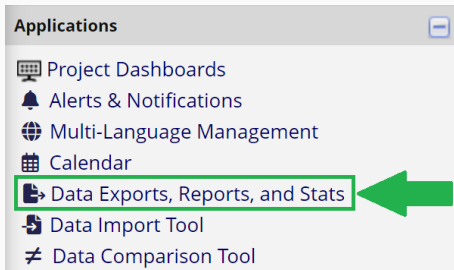
5. Additional options



Definition

Access

1. Project setup
2. Data Exports, Reports, and Stats.







Data exports





Access

3 You can export:










a. **All data** (all records): All data >> Export data

My Reports & Exports		
	Report name	View/Export Options
A	All data (all records and fields)	   

b. **Selected instruments**: Selected instruments >> Export data

B	Selected instruments (all records)	Select one or more instruments below for all records.
		<div>Instruments -- All instruments -- Demography</div>  <div>  </div>

c. **Personalized reports**: Newly created or pre-existing.

		  based on the selections above	 New creation
1	BMI - females	Preexisting   	  



Functionalities








Formats

Confidentiality and Data Protection options

Advanced format options

Select your export settings, which includes the export format (Excel/CSV, SAS, SPSS, R, Stata) and if you wish to perform de-identification on the data set.

Choose export format

- ☐  CSV / Microsoft Excel (raw data)
- ☐  CSV / Microsoft Excel (labels)
- ☐  SPSS Statistical Software
- ☐  SAS Statistical Software
- ☐  R Statistical Software
- ☐  Stata Statistical Software
- ☐  CDISC ODM (XML)

De-identification options (optional)

The options below allow you to limit the amount of sensitive information that you are exporting out of the project. Check all that apply.

Known Identifiers:

- ☐ Remove All Identifier Fields (tagged in Data Dictionary)
- ☐ Hash the Record ID field (converts record name to an unrecognizable value)

Free-form text:

- ☐ Remove unvalidated Text fields (i.e. Text fields other than dates, numbers, etc.)
- ☐ Remove Notes/Essay box fields

Date and datetime fields:

- ☐ Remove all date and datetime fields
- OR —
- ☐ Shift all dates by value between 0 and 364 days (shifted amount determined by algorithm for each record)
[What is date shifting?](#)

[Deselect all options](#)

Advanced data formatting options

Export blank values for gray Form Status?

All Form Status fields with a gray status icon can be exported either as a blank value or as "0" (Incomplete). Hint: Blank values are recommended if the data will be imported back into REDCap, in which this preserves the gray status icons for all the imported records.

Export gray Form Status fields with value of "0"

Set CSV delimiter character

Set the delimiter used to separate values in the CSV data file (only valid for CSV Raw Data and CSV Labels export formats):

, (comma) - default

Force all numbers into a specified decimal format?

You may choose to force all data values containing a decimal to have a specified decimal character (comma or period/full stop). This will be applied to all calculations and number-validated text values in the export file.

Use fields' native decimal format (default)

NOTE: Your data formatting selections above will be remembered in the future and will be pre-selected upon your next export.



Options

CSV / Excel (raw values)

CSV / Excel (labels)

SPSS

SAS

R

Stata

CDISC ODM (XML)

Choose export format

☐



CSV / Microsoft Excel (raw data)

☐



CSV / Microsoft Excel (labels)

☐



SPSS Statistical Software

☐



SAS Statistical Software

☐



R Statistical Software

☐



Stata Statistical Software

☐



CDISC ODM (XML)



Activity: Formats

1. Download the data in *CSV / Excel (raw values)* format and *CSV / Excel (labels)*. What is the difference?
2. Download the data in *R* format. What do you observe? Do you see a similar scenario when downloading in *SPSS* format?



Solution

- 1 Download the data in *CSV / Excel (raw values)* format and *CSV / Excel (labels)*. What is the difference?

- Data in *CSV / Excel (raw values)* format:

A	B	C	D	E	F	G	H	I	J	K	L
record_id	date_record	weight	height	date_birth	sex	menopause	medication_0	medication_1	medication_2	type_statins	bmi
1	16/10/2025	69	150	12/12/1996		1	0	0	0		30,6666667
2	09/10/2025	78	180	10/08/1950		0	1	0	0		24,0740741
3	09/10/2025	91	170	10/01/1940		1		0	0		31,4878893

In the category variables it returns the number assigned to each category.



Solution

- 1 Download the data in *CSV / Excel (raw values)* format and *CSV / Excel (labels)*. What is the difference?

- Data in *CSV / Excel (Labels)* format:

Record ID	Creation date of the record	Weight	Height	Date of birth	Sex	Menopause	Medication (choice=Statins)	Medication (choice=Anticoagulants)
1	16/10/2025	69	150	12/12/1996	Male		Unchecked	Unchecked
2	09/10/2025	78	180	10/08/1950	Female	Yes	Unchecked	Unchecked
3	09/10/2025	91	170	10/01/1940	Male		Unchecked	Unchecked
4							Unchecked	Unchecked

In the category variables it returns the labels of the categories.



Remarks

- You may notice that decimals are not displayed correctly: REDCap uses a dot for decimals (English format) by default, while Excel often uses a comma (Spanish format).
- Later, you will learn how to change the decimal point from a dot to a comma.
- For now, try opening the file in Notepad.

Solution

2 Download the data in *R* format. What do you observe?

- When downloading the data in *R* format, REDCap provide us with two files:
(1) *CSV / Excel (raw values)* and
(2) *R* with code for the labels.



R Statistical Software

Instructions: Use command `read.csv('filename')` to read in data file.

Click icon(s) to download:



 [Send file?](#)

Solution

2 Do you see a similar scenario when downloading in *SPSS* format?

- When we download the data in *SPSS* format, REDCap provides us with three files:

- (1) *CSV / Excel (raw values)*,
- (2) *SPSS* with code for the labels and
- (3) *Pathway Mapper* required for reading data in *SPSS*



SPSS Statistical Software

Download and save all 3 files on the right to a common location. First, double-click on the Pathway Mapper (.bat) file, which will run quickly and invisibly. (If you are not using a Windows operating system, such as Mac or Linux, please see the *Additional Instructions*.) Now double-click on the *.sps file, which will open SPSS. When the file is loaded and displayed, choose Run-->All from the top menu options. This action will launch the script that will automatically read in all data and manipulate data fields with labels, option values, etc.

[Additional instructions](#)

Click icon(s) to download:



 [Send file?](#)

R Package: REDCapDM

REDCapDM is an R package with a set of tools for managing data exported from a REDCap project.

REDCapDM 0.9.9.2000

Get started

Reference

Articles ▾

Changelog

REDCapDM

CRAN 0.9.9

R CMD check passing

downloads 381/month

downloads 12k



REDCapDM is an R package that allows users to manage data exported directly from REDCap or through an API connection. This package includes several functions designed for preprocessing data, generating reports on queries like outliers or missing values, and performing a follow-up of each identified query. 'REDCap' (Research Electronic Data CAPture; <https://projectredcap.org>) is a web application developed at Vanderbilt University, designed for creating and managing online surveys and databases. The REDCap API serves as an interface allowing external applications to connect to REDCap remotely, and is used to programmatically retrieve or modify project data or settings within REDCap, such as importing or exporting data.

The [REDCapDM website](#) has a description of the package functions as well as access to the package vignettes.

Here you can access the published article in BMC Medical Research Methodology: [REDCapDM: An R package with a set of data management tools for a REDCap project](#)

Installation

The *release* version can be installed from [CRAN](#).

```
install.packages("REDCapDM")
```

The *development* version can be installed from [GitHub](#) after installing the `remotes` package.

```
install.packages("remotes") # Run this line if the 'remotes' package isn't installed alr
remotes::install_github("bruigtp/REDCapDM")
```

Links

[View on CRAN](#)
[Browse source code](#)
[Report a bug](#)

License

[Full license](#)
MIT + file [LICENSE](#)

Citation

[Citing REDCapDM](#)

Developers

João Carmezim
Author, maintainer

Pau Satorra
Author

Judith Peñafiel
Author

Esther García
Author

Natàlia Pallarès
Author

Cristian Tebé
Author

<https://bruigtp.github.io/REDCapDM>



Definition

REDCap offers robust features for protecting confidential information and personal data. These features are essential for complying with current data protection legislation, such as the GDPR. They are also critical for safeguarding indirect identifiers (or quasi-identifiers). For instance, combining data such as date of birth, sex and profession could potentially allow an individual to be identified if the resulting group size is below a specified minimum number (e.g. fewer than 10 people meet those criteria).



Warning

- Do not enter personal data directly: Names, Surnames, E-mails, ID numbers, Clinical History Number and any other personal identifier.



Confidentiality

1. The project can be configured so that indirect personal data or any other data that the user wishes to keep confidential is not exported outside the project.
2. The project can be configured so that such data is automatically replaced with alternative values that remain useful for analysis within the study, thus avoiding the use of indirect personal data.



Options

Known identifiers

Delete fields tagged as identifiers.

Encode identifier

Free-form text

Delete unvalidated fields

Delete comments

Fields data

Delete date fields.

Delete date fields
but keep the time intervals.

De-identification options (optional)

The options below allow you to limit the amount of sensitive information that you are exporting out of the project. Check all that apply.

Known Identifiers:

- ☐ Remove all tagged Identifier fields (tagged in Data Dictionary)
- ☐ Hash the Record ID field (converts record name to an unrecognizable value)

Free-form text:

- ☐ Remove unvalidated Text fields (i.e. Text fields other than dates, numbers, etc.)
- ☐ Remove Notes/Essay box fields

Date and datetime fields:

- ☐ Remove all date and datetime fields

— OR —

- ☐ Shift all dates by value between 0 and 364 days (shifted amount determined by algorithm for each record) [What is date shifting?](#)

[Deselect all options](#)

Confidentiality and Data Protection



Options

Identifier fields: REDCap allows you to tag any field as an identifier.

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

How to use **[f]** Smart Variables **/** Piping **+** Field Embedding

Validation? (optional) Date (D-M-Y)

Minimum:

Maximum: 10-05-2006

Tip for min/max limits: You may pipe a value from another field to set dynamic range limits - e.g., [visit_date] or [event_1_arm_1][age]. You may also use the word **today** or **now** (not wrapped in quotes) for date/time fields.

– OR –

-- select ontology service --

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)
Align the position of the field on the page

Field Note (optional)
Small reminder text displayed underneath field





Confidentiality and Data Protection



Options

Date fields: With REDCap, you can download dates shifted by a number between 0 and 365 days. By applying the same shift to all dates within a record, the differences between dates in that record remain unchanged.

Real data:

Registry creation date		10-05-2024		Today	D-M-Y
Date of birth		06-03-1979		Today	D-M-Y

Displaced data:

record_id	weight	height	date_registry	date_birth
1	60	150	15/8/2023	22/8/1993



Definition

REDCap allows you to customize how values in blank fields of instruments marked as “grey” (incomplete) are exported. You can also modify the characters used as CSV separators and the default decimal symbol.

Values in blank fields of grey instruments

These can be exported as either blank values or as ‘0’ (indicating incomplete).

Advanced data formatting options

Export blank values for gray Form Status?

All Form Status fields with a gray status icon can be exported either as a blank value or as “0” (Incomplete). Hint: Blank values are recommended if the data will be imported back into REDCap, in which this preserves the gray status icons for all the imported records.

Export gray Form Status fields with blank value ▼

Export gray Form Status fields with value of “0”

Export gray Form Status fields with blank value



Remarks

- Exporting blank values is recommended if you plan to import the data back into REDCap, since the grey status icons will be preserved.

Advanced options



Definition

CSV separator

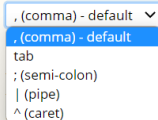
You can change the delimiter used to separate variables/columns in the CSV file.

Decimal separator

You can change the symbol that indicates the decimals.

Set CSV delimiter character

Set the delimiter used to separate values in the CSV data file (only valid for CSV Raw Data and CSV Labels export formats):

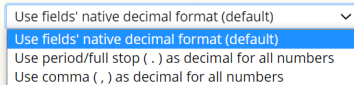


Force all numbers into a specified decimal format?

You may choose to force all data values containing a decimal to have a specified decimal character (comma or period/full stop). This will be applied to all calculations and number-validated text values in the export file.

Force all numbers into a specified decimal format?

You may choose to force all data values containing a decimal to have a specified decimal character (comma or period/full stop). This will be applied to all calculations and number-validated text values in the export file.



your next export.



Definition

REDCap allows you to choose whether or not to export the name of the Data Access Group (DAG) associated with each record.

Additional export options

- ☒ Export Data Access Group name for each record (if record is in a group)?

Data import

Data import

1. Access



Access

2. Formats



Options

3. CSV/EXCEL import



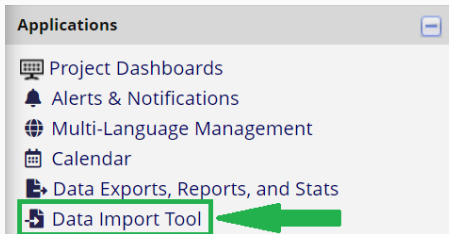
Instructions



Advanced options

Access

1. Project setup
2. Data Import Tool.





Options

CSV / Excel

CDISC ODM (XML)



CSV import



CDISC ODM (XML) import



Remarks

- In this course you will only work with the CSV/EXCEL format.
- Actual data must not be entered until the project has been completed and moved to production status.

CSV/EXCEL import



Instructions

1. Download the template

You can download the data import template as a CSV file. Click on one of the two links.

1.) Click the link below to download your data import template as a CSV file. Save it locally to your computer and then open it to begin filling it with the data you wish to import.

[Download your Data Import Template](#) (with records in rows)

OR

[Download your Data Import Template](#) (with records in columns)

There are two options for downloading the template:

1. Records per row

	A	B	C	D	E	F	G	H	I	J	K	L
1	record_id	weight	height	date_registry	date_birth	sex	medication	hta	copd	dm	demography_complete	
2												
3												

2. Records per column

	A	B	C	D	E	F	G	H
1	Variable / Field	Record	Record	Record	Record	Record	Record	Record
2	record_id							
3	weight							
4	height							
5	date_registry							
6	date_birth							
7	sex							
8	medication							
9	hta							
10	copd							
11	dm							
12	demography_complete							



Instructions

2. Enter the data in the template.

The following conditions must be met:

- Do not change variable names
- All structured fields must use encoded values (not labels).

	A	B	C	D	E	F	G	H	I	J	K
1	record_id	weight	height	date_registry	date_birth	sex	medication	hta	copd	dm	demography
2	1	60	150	1/3/2024	5/19/2000	0	1	1	0	1	0



Warning

- To reduce import time, delete any empty rows or columns before importing.
- Using statistical software to prepare the data can be very useful.



Instructions

3. Data import

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

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

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

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

Choose the delimiter for the uploaded file: Comma (,) ▼

☒ **Upload your CSV file:**

Seleccionar archivo Ninguno a...ivo selec.

Upload File



Instructions

4. Verification of data.

Once the file is uploaded, the data will not be imported immediately. Instead, it will be displayed and checked for errors to ensure that all the data is in the correct format before it is imported into the project.

✔ Your document was uploaded successfully and is ready for review.

You are now required to view the Data Display Table below to approve all the data before it is officially imported into the project. Follow the instructions below.

Instructions for Data Review

The data you uploaded from the file is displayed in the Data Display Table below. Please inspect it carefully to ensure that it is all correct. After reviewing it, **click the 'Import Data' button at the bottom of this page** to import this data into the project.

KEY for Data Display Table below

Black text = New Data

Gray text = Existing data (will not change)

(Red text) = Data that will be overwritten

DATA DISPLAY TABLE

record_id	weight	height	date_registry	date_birth	sex	medication	hta	copd	dm	demography_complete
1 (existing record)	60	150	2024-01-03 (2024-05-10)	2000-05-19 (1994-05-18)	0 (1)	1	1	0	1 (0)	0

Do you wish to import the new data (displayed above) into the project?

(Click the button below to import the data.)

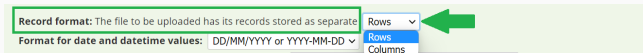
Import Data

Cancel

Advanced options

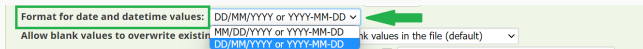
The data import options are:

1. Record format: Rows or columns



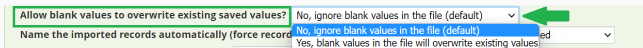
The screenshot shows the 'Record format' dropdown menu. The text 'Record format: The file to be uploaded has its records stored as separate' is visible. The dropdown is open, showing three options: 'Rows' (highlighted in blue), 'Columns', and 'Columns'. A green arrow points to the 'Rows' option.

2. Format of dates and times



The screenshot shows the 'Format for date and datetime values' dropdown menu. The text 'Format for date and datetime values:' is visible. The dropdown is open, showing three options: 'DD/MM/YYYY or YYYY-MM-DD' (highlighted in blue), 'MM/DD/YYYY or YYYY-MM-DD', and 'DD/MM/YYYY or YYYY-MM-DD'. A green arrow points to the 'DD/MM/YYYY or YYYY-MM-DD' option.

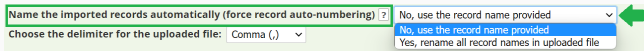
3. Allow or disallow blank values to overwrite existing values



The screenshot shows the 'Allow blank values to overwrite existing saved values?' dropdown menu. The text 'Allow blank values to overwrite existing saved values?' is visible. The dropdown is open, showing three options: 'No, ignore blank values in the file (default)' (highlighted in blue), 'No, ignore blank values in the file (default)', and 'Yes, blank values in the file will overwrite existing values'. A green arrow points to the 'No, ignore blank values in the file (default)' option.

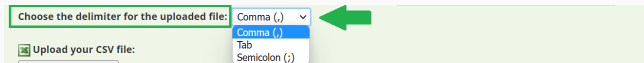
Advanced options

- 4 Automatically rename identifiers or use the ones provided in the file.



Name the imported records automatically (force record auto-numbering) ? No, use the record name provided
Choose the delimiter for the uploaded file: Comma (,) No, use the record name provided
Yes, rename all record names in uploaded file

- 5 Choose the separator: comma (,), tab, or semicolon (;).



Choose the delimiter for the uploaded file: Comma (,) Comma (,) Tab Semicolon (;)
Upload your CSV file:

**Thank you and see you
tomorrow!**

