

Introduction to REDCap for Electronic Data Collection

**Sherman
Centre**
for Digital Scholarship

Wednesday, February 4, 2026

4:00pm – 5:00pm (**Online**)

scds.ca

scds@mcmaster.ca

A joint initiative of McMaster's
Faculty of Humanities and
McMaster University Libraries

McMaster
University



**Sherman
Centre**
for Digital Scholarship

Introduction to REDCap for Electronic Data Collection

Presenter: Shubrandu Sanjoy

Title: PhD Candidate in Health Research Methodology

Date: February 4, 2026



A joint initiative of McMaster's
Faculty of Humanities and
McMaster University Libraries



Land Acknowledgement

McMaster University is located on the traditional Territories of the Mississauga and Haudenosaunee Nations, and within the lands protected by the “Dish With One Spoon” wampum agreement.

McMaster's
anities and
ity Libraries

McMaster
University



Sherman
Centre
for Digital Scholarship



Code of Conduct

The Sherman Centre and the McMaster University Libraries are committed to fostering a supportive and inclusive environment for its presenters and participants.

As a participant in this session, you agree to support and help cultivate an experience that is collaborative, respectful, and inclusive, as well as free of harassment, discrimination, and oppression. We reserve the right to remove participants who exhibit harassing, malicious, or persistently disruptive behaviour.

Please refer to our code of conduct webpage for more information: [**scds.ca/code-of-conduct/**](http://scds.ca/code-of-conduct/)

Session Recording and Privacy

This session is being recorded with the intention of being shared publicly via the web for future audiences. In respect of your privacy, participant lists will not be shared outside of this session, nor will question or chat transcripts.

Questions asked via the chat box will be read by the facilitator without identifying you. Note that you may be identifiable when asking a question during the session in an audio or visual format.

Book an Appointment with the DASH Team

Receive help from a member of the DASH team! DASH can assist with the following topics:

- Creating data visualizations, including charts, graphs, and scatter plots
- Figuring out which statistical tests to run (e.g., t-test, chi-square, etc.).
- Analyzing data with software including SPSS, Python, R, SAS, ArcGIS, MATLAB, and Excel
- Choosing which software package to use, including free and open-source software
- Troubleshooting problems related to file formats, data retrieval, and download
- Selecting methodology and type of data analysis to use in a thesis project

Book an appointment: <https://library.mcmaster.ca/services/dash>

Book an Appointment with the RDM Team

McMaster RDM Specialists are available to consult on and assist with a variety of research data management topics including:

- General consulting on data management needs
- Assisting researchers in creating Data Management Plans and in using the Portage Network DMP Assistant tool;
- Advising on issues related to research data storage and backup;
- Facilitating data sharing--whether by consulting on prospective discipline-specific data repositories or assisting with data deposit to general repositories such as McMaster Dataverse and the Federated Research Data Repository.
- Providing guidance on creating data documentation and metadata;

Learn more at: rdm.mcmaster.ca

Certificate Programs

The Sherman Centre for Digital Scholarship Certificate of Attendance

The Sherman Centre's certificate program recognizes attendance at our workshops. It complements degree training, supports the development of critical competencies in data analysis, research data management, and digital scholarship, and formalizes core skills fostered by our workshops.

Participants are invited to attend seven workshops and receive a certificate of attendance. To verify your participation in today's workshop, we will provide a code and additional instructions at the end of the session.

You can learn more about the certificate program at scds.ca/certificate-program

The Canadian Certificate for Digital Humanities

This workshop is also eligible for the Canadian Certificate for Digital Humanities. To learn more about the certificate, visit ccdhn.ca. You can also contact local liaison Alexis-Carlota Cochrane at scds@mcmaster.ca



Winter 2026: Upcoming Workshops

Data Analysis Support Hub

- February 5:** Visualizing Your Data: Creating Effective Plots with ggplot2 in R
- February 10:** Finding, Accessing, and Adding GIS Data to Your Project
- February 12:** Introduction to Python Programming
- March 4:** Designing Complex Surveys with REDCap

Research Data Management

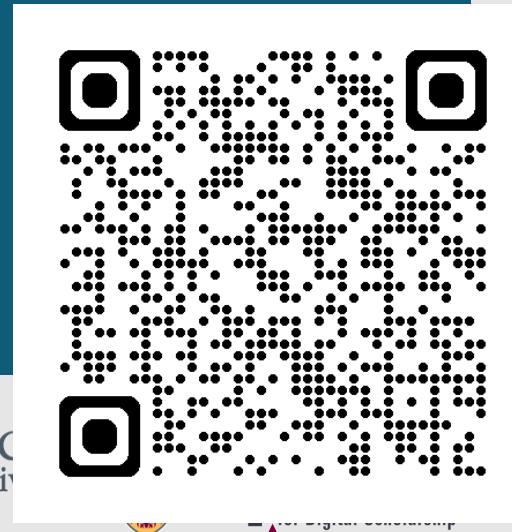
- February 19:** Communities Empowered by Data 101: Tools and Best Practices
- May 12:** Data Management Plan Bootcamp (In-Person)
- May 19:** Data Deposit Bootcamp (In-Person)

Digital Research

- February 11:** Visualizing Bibliometric Networks with VOSviewer

Do More with Digital Scholarship

- February 6:** Create a Digital Exhibition with Omeka S
- February 9:** Rethinking “Good” Data: Power, Vulnerability, and Queer Data Care



REDCap support

Web site: <https://projectredcap.org/>

FHS REDCap website: <https://redcap.healthsci.mcmaster.ca/>

To place a new REDCap request or to log a support ticket, users may do so via JIRA portal at : getredcap.mcmaster.ca

SCDS Links

Send SCDS an Email:

scds@mcmaster.ca

Subscribe to our Newsletter:

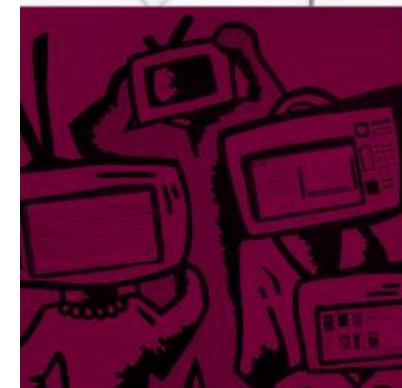
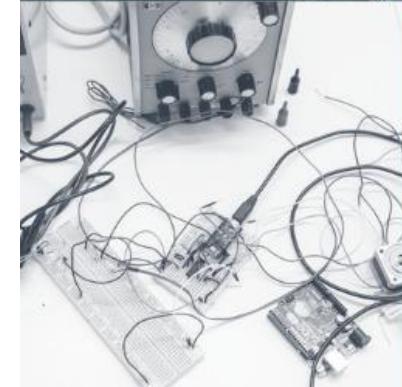
<https://u.mcmaster.ca/sign-up>

Register for a Workshop:

<https://u.mcmaster.ca/scds-workshops>

Schedule a Consultation:

<https://libcal.mcmaster.ca/appointments>



A joint initiative of McMaster's
Faculty of Humanities and
McMaster University Libraries



Learning Objectives

By the end of this workshop, you will:

- Describe the purpose and key features of REDCap for research data collection
- Build and customize a basic survey or data collection form
- Navigate core project settings and project workflows
- Distribute surveys using public links or automated invitations
- Perform basic data review and simple analysis within REDCap
- Export project data for analysis in R, SAS, SPSS, or Excel
- Recognize how REDCap supports secure, organized, and reproducible research workflows

What is REDCap?



- Research Electronic Data Capture
- Secure web-based platform
- Designed for academic and clinical research
- Used globally by thousands of institutions
- Supports surveys, and longitudinal studies

scds.ca
scds@mcmaster.ca

A joint initiative of McMaster's
Faculty of Humanities and
McMaster University Libraries

McMaster
University 

 Sherman
Centre
for Digital Scholarship

Why Use REDCap?



- High data security and privacy compliance
- Data validation and quality checks
- Role-based user access control
- Codebook and data dictionary generation
- Avoid missing responses and skipped questions

scds.ca
scds@mcmaster.ca

A joint initiative of McMaster's
Faculty of Humanities and
McMaster University Libraries



Common Field Types



- Text
- Multiple Choice
- Checkbox
- Date
- Yes/No
- Calculated Fields
- File Upload
- Signature

scds.ca
scds@mcmaster.ca

A joint initiative of McMaster's
Faculty of Humanities and
McMaster University Libraries



- Shows or hides questions based on previous answers
- Reduces unnecessary questions
- Saves participant time
- Conditional questions example

If “Do you smoke?” = Yes → show “How many cigarettes per day?”

If “No” → skip follow-up questions



Basic Statistical Analysis



- View summary statistics (counts, averages, %)
- Generate simple charts and graphs
- Create custom reports and filters
- Monitor missing data
- Quick data preview without exporting

scds.ca
scds@mcmaster.ca

A joint initiative of McMaster's
Faculty of Humanities and
McMaster University Libraries



Survey Distribution



- Public link
- Email invites
- QR codes
- Reminders

scds.ca
scds@mcmaster.ca

A joint initiative of McMaster's
Faculty of Humanities and
McMaster University Libraries



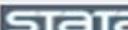
Basic User Rights



- Anybody, that has a user REDCap account can be added to your project as a user with a custom set of rights
- Give users only access to application they actually need

Basic Data Export

Choose export format

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

Participant Consent Collection



- Create online consent forms as surveys
- Electronic Signature field for participant signing
- Required acknowledgment checkboxes (e.g., “I agree”)
- Date & time stamping automatically recorded
- Works on computer, tablet, or phone

scds.ca
scds@mcmaster.ca

A joint initiative of McMaster's
Faculty of Humanities and
McMaster University Libraries



Live Demonstration Steps



- Overall navigation
- Project setup
- How to design your variables
- Testing your forms, user rights
- Data collection
- Exporting data

scds.ca
scds@mcmaster.ca

A joint initiative of McMaster's
Faculty of Humanities and
McMaster University Libraries



SCDS Links

Send SCDS an Email:

scds@mcmaster.ca

Register for a Workshop:

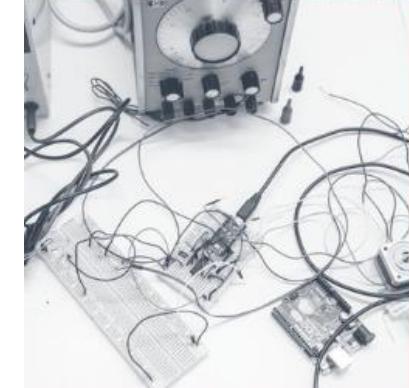
<https://u.mcmaster.ca/scds-workshops>

Subscribe to our Newsletter:

<https://u.mcmaster.ca/sign-up>

Schedule a Consultation:

<https://libcal.mcmaster.ca/appointments>



A joint initiative of McMaster's
Faculty of Humanities and
McMaster University Libraries