

REDCap – How to add a User to a project

- Navigate to the User Rights hyperlink, located on the left side of the project screen. This hyperlink will open the User Rights tab.
- In the 'Add with Custom Rights' text box, enter the username of the individual you want to add to the project. For example, if the individual's email is: jdoe@gwu.edu, you will enter **jdoe** into the text box. Please do not enter the full email address.
- Click 'Add with Custom Rights.'

The screenshot shows the REDCap interface for managing user rights. On the left is a sidebar with navigation options like 'Data Collection' and 'Applications'. The main content area has three tabs: 'Project Setup', 'User Rights' (highlighted with a red box), and 'Data Access Groups'. Below the tabs is a descriptive paragraph about user management. Underneath, there are three sections: 'Add new users' (highlighted with a red box), 'Assign new user', and 'Create new roles'. The 'Add new users' section contains a text input field with 'jdoe' and an 'Add with custom rights' button. The 'Create new roles' section contains a text input field for a role name and a 'Create role' button.

- Note: If the user has not logged into REDCap previously, their full name will not appear when you are typing in their username. It is okay to continue typing in their username and then selecting their specific rights. Once the new user logs into REDCap, the project will appear on their My Projects list.
- An 'Adding New User' popup box will appear. Designate the appropriate rights for the individual. Click 'Add User' when completed.

You may set the rights for the user below by checking the boxes next to the application tools to which you wish to grant them access. You may also grant them or deny them access to individual data collection instruments, if so desired. To save your selections, click the "Add user" button at the bottom of the page.

Adding new user " **jdoe** "

Basic Rights

Expiration Date (MM/DD/YY)
(if applicable)

Highest level privileges:

Project Design and Setup

User Rights

Data Access Groups

Privileges for data exports (including PDFs and API exports), reports, and stats:

Data Exports No Access
* De-identified means that all free-form text fields will be removed, as well as any date/time fields and Identifier fields.
 De-Identified*
 Remove all tagged Identifier fields
 Full Data Set

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

Stats & Charts

Other privileges:

Manage Survey Participants

Calendar

Data Import Tool

Data Entry Rights

NOTE: The data entry rights *only* pertain to a user's ability to view or edit data on a web page in REDCap (e.g., data entry forms, reports). It has no effect on data imports or data exports.

	No Access	Read Only	View & Edit	Edit survey responses
Demographics (survey)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>
Patient Data (survey)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>
Ctsi Service Request Form	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>

New User Notification

Notify user of their project access via email?

- If the user has logged into REDCap before, you will have the option to send them an email, notifying them of their project access. If they have not yet logged into REDCap, you will not see this option
- The new user will appear in the Username list on the User Rights tab. A summary of their access will appear as well.

Role name <small>(click role name to edit role)</small>	Username or users assigned to a role <small>(click username to edit or assign to role)</small>	Expiration <small>(click expiration to edit)</small>	Data Access Group <small>(click DAG to assign user)</small>	
				D

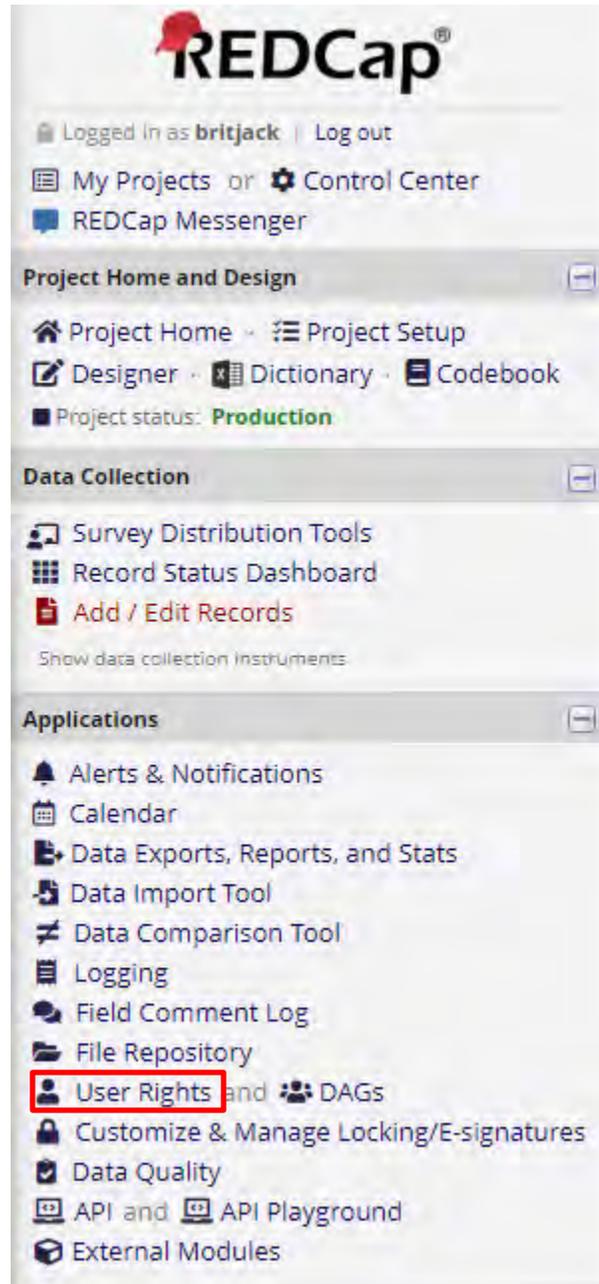
2 | Page
Last Updated: 6/25/2018 10:06 AM

REDCap - How To Enable an Email Notification for Survey Responses

Individual users may be added to receive survey notifications each time a participant completes a survey.

Generic email accounts (i.e. tsiredcap) may also be added to receive notifications as well.

- To add a user as a survey notification recipient, first add them as a User to the project.
 - Navigate to the Tool Bar on the left-hand side of the screen. Select User Rights.



- Enter the username or name of the individual into the first text box and click Add with Custom Rights

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)

- The User Rights pop-up will appear where you can designate rights to the user. Click Add User.

Adding new user "tsiredcap"

You may set the rights for the user below by checking the boxes next to the application tools to which you wish to grant them access. You may also grant them or deny them access to individual data collection instruments, if so desired. To save your selections, click the "Add user" button at the bottom of the page.

Basic Rights

Expiration Date (if applicable) (MM/DD/YY)

Highest level privileges:

- Project Design and Setup
- User Rights
- Data Access Groups

Privileges for data exports (including PDFs and API exports), reports, and stats:

- Data Exports
 - No Access
 - De-Identified*
 - Remove all tagged Identifier fields
 - Full Data Set
- Add / Edit Reports
Also allows user to view ALL reports (but not necessarily all data in the reports)
- Stats & Charts

Other privileges:

- Manage Survey
- Participants
- Calendar
- Data Import Tool
- Data Comparison Tool
- Logging
- File Repository
- Data Quality
[What is Data Quality?](#)
- API
[What is the REDCap API?](#)
- Create & edit rules
- Execute rules
- API Export
- API Import

Data Entry Rights

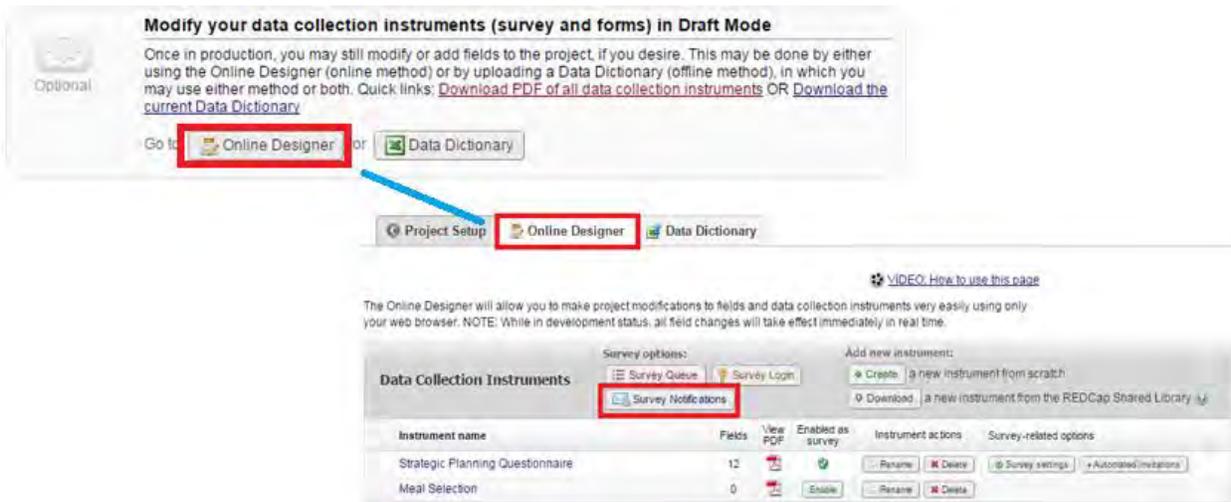
*NOTE: The data entry rights *only* pertain to a user's ability to view or edit data on a web page in REDCap (e.g., data entry forms, reports). It has no effect on data imports or data exports.*

	No Access	Read Only	View & Edit	Edit survey responses
Strategic Planning Questionnaire (survey)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>
Meal Selection	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>

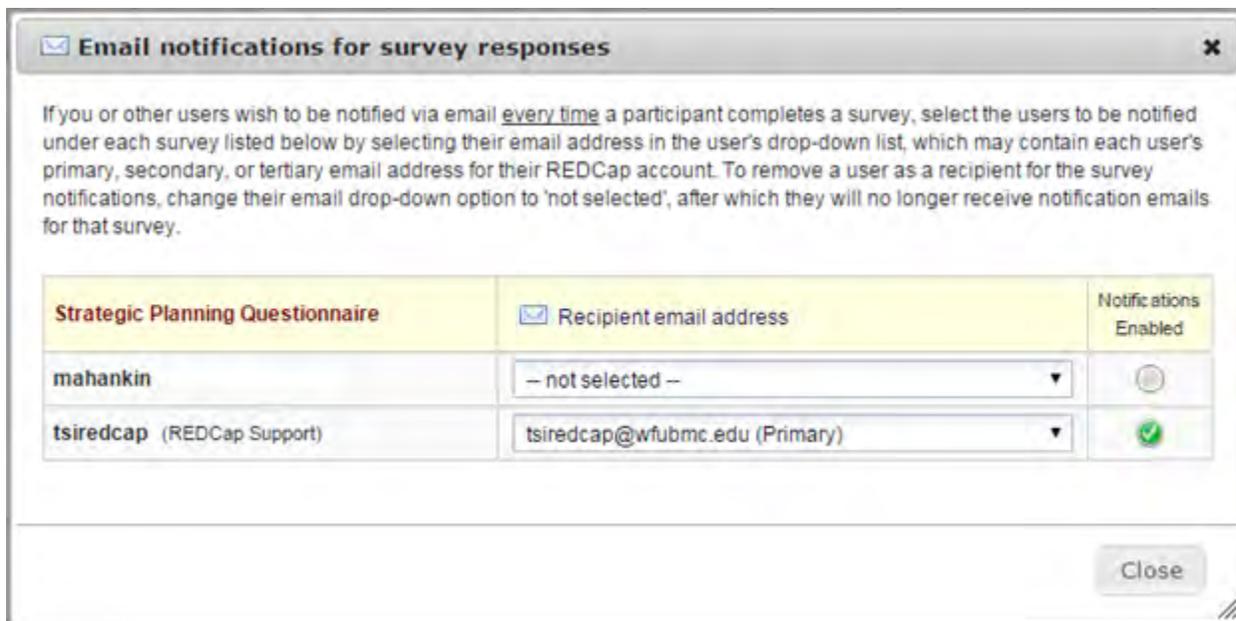
New User Notification

Notify user of their project access via email?

- Navigate to the Project Set-Up tab and click on the Online Designer. This will open the Online Designer tab. Click on the Survey Notifications button.



- Select the email address next to the recipient you would like to receive email notifications.



- If the account (or individual user) has not logged into REDCap prior to this event, which may happen at times with generic email addresses, please first log the account/user into REDCap using the account's/user's credentials. (If you are unsure of the account password, contact IT for this information.) Once the account/user has been logged into REDCap, the email address should appear on the Email Notification for Survey Responses email selection pop-up.

REDCap – How to Archive or Delete a Project

- From the Project Home page, select 'Other Functionality.'

The screenshot shows the top navigation bar with four tabs: 'Project Home', 'Project Setup', 'Other Functionality', and 'Project Revision History'. The 'Other Functionality' tab is highlighted with a red box. Below the navigation bar is the 'Quick Tasks' section, which lists several tasks with icons and descriptions:

- Codebook**: 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.
- Manage Survey Participants**: Invite participants to complete your survey by emailing a public survey link or building a participant list for batch notification.
- Export data**: Export your data from REDCap to open or view in Excel or various stats packages.
- Create a report**: Build custom reports for quick views of your data, and export reports to Excel/CSV.
- Check data quality**: Build or execute data quality rules to find discrepancies and errors in your project data.
- User Rights**: Grant new users access to this project or modify user privileges for current users.
- Online Designer and Data Dictionary Upload**: 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](#)

- To delete the project:** Under Project Management, select 'Delete the project.' A pop-up window will display. Type "DELETE" in the text box and hit the 'Delete the project' button.
 - Note: This will permanently delete the project, and you will not be able to retrieve any data or forms from this project once it has been deleted.*

The screenshot shows the top navigation bar with four tabs: 'Project Home', 'Project Setup', 'Other Functionality', and 'Project Revision History'. The 'Other Functionality' tab is highlighted. Below the navigation bar is the 'Project Management' section, which contains three main areas:

- What is the REDCap API?**: The REDCap API is an interface that allows external applications to connect to REDCap remotely, and is used for programmatically retrieving or modifying data or settings within REDCap, such as performing automated data imports/exports from a specified REDCap project. For details on the capabilities of the REDCap API and how to use it, please see the [REDCap API documentation](#).
NOTE: If you wish to obtain an API token, which will allow you to make API requests, then someone must first grant you API user privileges on the User Rights page, after which you will then see a link called 'API' on the left-hand menu. That API page will provide instructions on how to request an API token.
- Copy or Back Up the Project**:
 - Copy the project**: **Make an exact duplicate of this project.** All project fields will be copied over, and you will be prompted to set the title and info for the new project. You may choose to copy or not copy the existing data in the current project to the new one.
 - Download metadata only (XML)**: **Download a backup of this project.** The entire project (all records, instruments, fields, and project attributes) can be downloaded as a single XML file (CDISC ODM format). This XML file can be used to create a clone of the project (including its data, optionally) on this REDCap server or on another REDCap server (it can be uploaded on the Create New Project page). Because it is in CDISC ODM format, it can also be used to import the project into another ODM-compatible system.
 - Download metadata & data (XML)**: **NOTE:** The exported XML file does "not" contain the project's logging history (audit trail), but if you wish to obtain it, you may freely download it any time at the top of the Logging page.
- Project Management**:
 - Delete the project**: You may completely remove this project, in which all its data will be permanently deleted also. This can only be done while the project is still in development or you can send a request to delete the project while in production to a REDCap administrator.
 - Erase all data**: You may erase all currently collected data in the project, which includes all calendar events, documents uploaded for records/responses, survey responses (if applicable), and any logging events pertaining to data collection. This can only be done while the project is still in development or you can send a request to delete the project while in production to a REDCap administrator.
 - Archive the project**: You may archive the project if you do not wish to use it any longer. Archiving the project will take it offline and remove it from your list of projects. It can only be accessed again by clicking the *Show Archived Projects* link at the bottom of the *My Projects* page. You will be able to un-archive the project at any time and bring it back online simply by accessing it again and returning to this page.

- **To archive the project:** Under Project Management, select ‘Archive the project.’
 - *Note: You can still access archived projects from the My Projects page by scrolling to the bottom of your projects list and selecting ‘Show Archived Projects.’*

Project Home
 Project Setup
 Other Functionality
 Project Revision History

What is the REDCap API?

The REDCap API is an interface that allows external applications to connect to REDCap remotely, and is used for programmatically retrieving or modifying data or settings within REDCap, such as performing automated data imports/exports from a specified REDCap project. For details on the capabilities of the REDCap API and how to use it, please see the [REDCap API documentation](#).

NOTE: If you wish to obtain an API token, which will allow you to make API requests, then someone must first grant you API user privileges on the User Rights page, after which you will then see a link called ‘API’ on the left-hand menu. That API page will provide instructions on how to request an API token.

Copy or Back Up the Project

Copy the project

Download metadata only (XML)

Download metadata & data (XML)

Make an exact duplicate of this project. All project fields will be copied over, and you will be prompted to set the title and info for the new project. You may choose to copy or not copy the existing data in the current project to the new one.

Download a backup of this project. The entire project (all records, instruments, fields, and project attributes) can be downloaded as a single XML file (CDISC ODM format). This XML file can be used to create a clone of the project (including its data, optionally) on this REDCap server or on another REDCap server (it can be uploaded on the Create New Project page). Because it is in CDISC ODM format, it can also be used to import the project into another ODM-compatible system.

NOTE: The exported XML file does “not” contain the project’s logging history (audit trail), but if you wish to obtain it, you may freely download it any time at the top of the Logging page.

Project Management

Delete the project

Erase all data

Archive the project

You may completely remove this project, in which all its data will be permanently deleted also. This can only be done while the project is still in development or you can send a request to delete the project while in production to a REDCap administrator.

You may erase all currently collected data in the project, which includes all calendar events, documents uploaded for records/responses, survey responses (if applicable), and any logging events pertaining to data collection. This can only be done while the project is still in development or you can send a request to delete the project while in production to a REDCap administrator.

You may archive the project if you do not wish to use it any longer. Archiving the project will take it offline and remove it from your list of projects. It can only be accessed again by clicking the *Show Archived Projects* link at the bottom of the *My Projects* page. You will be able to un-archive the project at any time and bring it back online simply by accessing it again and returning to this page.

REDCap – Automated Survey Invitations

Automated survey invitations allow a user to send invitations immediately or at a designated time in the future when certain conditions have been met.

Option 1: Using the public survey link to initiate a Record ID in the project

Step 1:

- To create automatic survey invitations, first enable the forms to be used as surveys

Step 2:

- The initial survey will need to capture email addresses of participants in order for the automated survey invitations to send. Please create a field on the initial survey for email addresses. Ensure the validation for that field is set for 'email.'

The screenshot shows the 'Add New Field' form in REDCap. The 'Field Type' is set to 'Text Box (Short Text, Number, Date/Time, ...)'. The 'Variable Name' is 'email'. The 'Field Label' is 'Email'. The 'Validation?' dropdown menu is open, showing a list of validation options. The 'Email' option is highlighted with a red box. Other options include 'None', 'Date (D-M-Y)', 'Date (M-D-Y)', 'Date (Y-M-D)', 'Datetime (D-M-Y H:M)', 'Datetime (M-D-Y H:M)', 'Datetime (Y-M-D H:M)', 'Datetime w/ seconds (D-M-Y H:M:S)', 'Datetime w/ seconds (M-D-Y H:M:S)', 'Datetime w/ seconds (Y-M-D H:M:S)', 'Integer', 'Letters only', 'Number', 'Number (1 decimal place)', 'Number (2 decimal places)', 'Number (3 decimal places)', 'Number (4 decimal places)', and 'Phone (North America)'.

Step 3:

- Navigate to the Project Setup tab and locate the 'Enable optional modules and Customizations' bubble. Click Enable for the 'Designate an email field to use for invitations to survey participants.'

The screenshot displays the 'Project Setup' interface with three main sections:

- Main project settings:** Includes a 'Not started' status, 'Disable' and 'Enable' buttons, and options for 'Use surveys in this project?' (checked) and 'Use longitudinal data collection with defined events?' (unchecked). A video link 'VIDEO: How to create and manage a survey' is also present.
- Design your data collection instruments & enable your surveys:** Provides instructions on using the Online Designer or Data Dictionary, with quick links for downloading PDFs and the current Data Dictionary. It also includes buttons for 'Online Designer', 'Data Dictionary', and 'REDCap Shared Library', along with a 'Check For Identifiers' link.
- Enable optional modules and customizations:** Lists several modules with 'Enable' or 'Disable' buttons. The 'Designate an email field for sending survey invitations' option is highlighted with a red box.

The 'Enable' button will open a pop-up box where you will select the variable name used for the 'Email' field.

The pop-up box is titled 'Designate an email field for sending survey invitations'. It contains the following text:

Choose an email field to use for invitations to survey participants:

-- select a field --
-- select a field --
Demographics
email "Email"

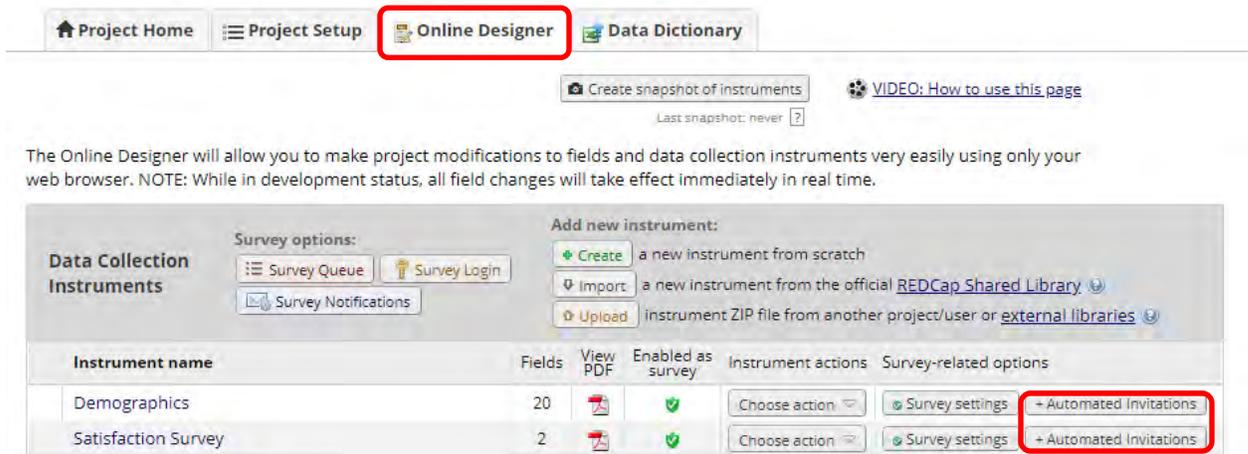
mail addresses for sending invitations to your survey participants by designating a field in address captured for that particular field will have that email address show up as the participant's email address in the Participant List (unless an email address has already been entered for that participant in the Participant List directly).

Using the designated email address field can be especially valuable when your first data collection instrument is not enabled as a survey while one or more other instruments have been enabled as surveys. Since email addresses can only be entered into the Participant List directly for the first data collection instrument, the designated email field provides another opportunity to capture the email address of survey participants.

Please be aware that designating an email field means that survey responses can NEVER BE ANONYMOUS because of the fact that the participant's email address can be viewed on a data entry form, which means it is easy to identify the record/response to which the email address belongs.

Step 4:

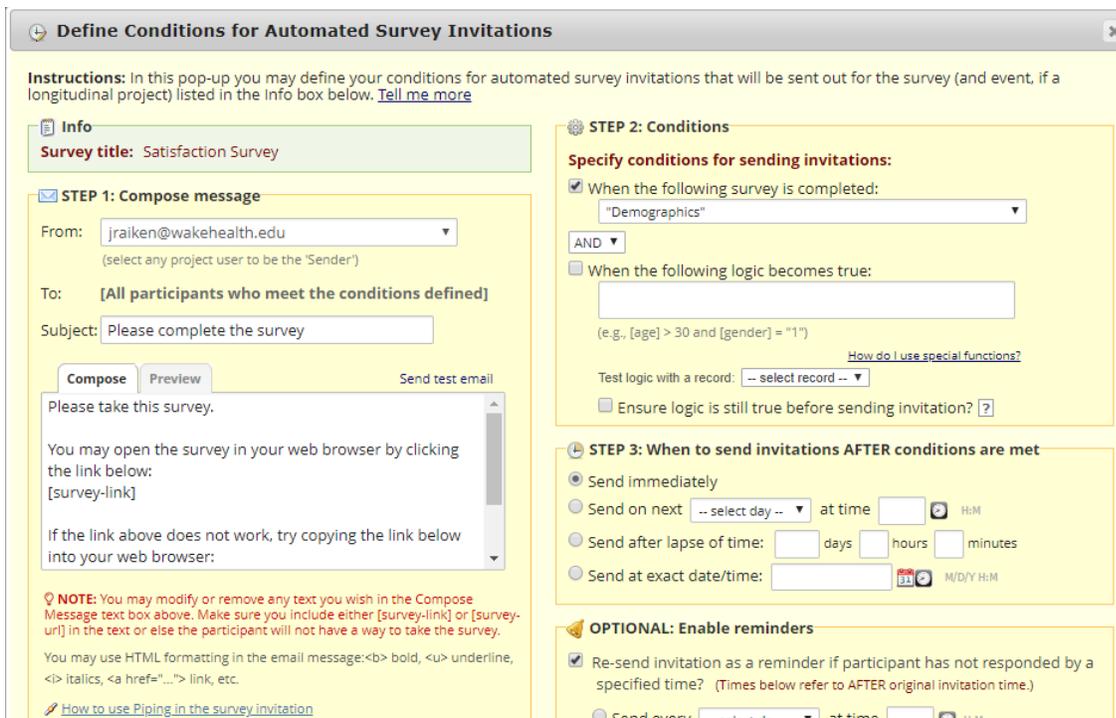
- On the Online Designer tab, click on 'Automated Invitations' for the first survey to be sent with the automated invitation.



Step 5:

- Define the conditions for the survey – Compose the message, define the conditions, set the time for the invitation to be sent, optional: enable reminders to be sent if the survey is not completed, and finally activate the survey invitation.

In this example, we will send the Satisfaction Survey immediately after the Demographics Survey is completed.



Observations:

- As participants complete the initial survey and provide their email address, the Participant List will begin to fill with the email addresses. Notice that the individuals Record ID number will appear beside their name.

Manage Survey Participants

Public Survey Link Participant List Survey Invitation Log

The Participant List option allows you to **send a customized email** to anyone in your list and **track who responds to your survey**. It is also possible to identify an individual's survey answers, if desired, by providing an Identifier for each participant (this feature must first be enabled by clicking the 'Enable' button in the table below). Note: All survey responses collected are considered anonymous unless you 1) are using Participant Identifiers or 2) have enabled the designated email field for invitations. [More details](#)

Participant List belonging to [Initial survey] "Demographics" Remove all participants

Displaying 1 - 1 of 1 Add participants Compose Survey Invitations Export list

Email	Record	Participant Identifier	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
jraiken@wakehealth.edu	1	<input type="checkbox"/> Enable	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- On the Survey Invitation Log, we can see that the 'view past invitations' show the automatic email invitation for the Satisfaction Survey has been sent.

Manage Survey Participants

Public Survey Link Participant List **Survey Invitation Log**

Listed below are the survey invitations that have already been sent or have been scheduled to be sent to survey participants in this project. For each invitation it displays the participant email, participant identifier (if exists), survey name, and the date/time in which the invitation was (or will be) sent. You may even view the invitation email itself by clicking the icon in the 'View Email' column. Please note that all times below correspond to the time zone "America/New_York", in which the current time is 07/31/2018 9:54am.

Survey Invitation Log (in ascending order by time sent) View past invitations View future invitations

Begin time: 07/31/2018 09:54 End time: (M/D/Y H:M)

Display All invitation types and All response statuses

Display All surveys

Display All records

Display invitation reminders?

Apply filters Reset Download log (as seen below) Delete all selected

Invitation send time	View Invite	Participant Email	Record	Participant Identifier	Survey	Survey Link	Responded?	Errors (if any)
09/03/2018 9:00am		jraiken@wakehealth.edu	1		Satisfaction Survey		<input type="checkbox"/>	<input type="checkbox"/>

- In this example, we set the original email to send immediately after Demographics Survey was submitted. Example email based on our email composition input:

To  Jennifer R. Aiken

Please take this survey.

You may open the survey in your web browser by clicking the link below:
[Satisfaction Survey](#)

If the link above does not work, try copying the link below into your web browser:
http://redcapint.wakehealth.edu/redcap_int/surveys/?s=w6TTWQYwHW

This link is unique to you and should not be forwarded to others.

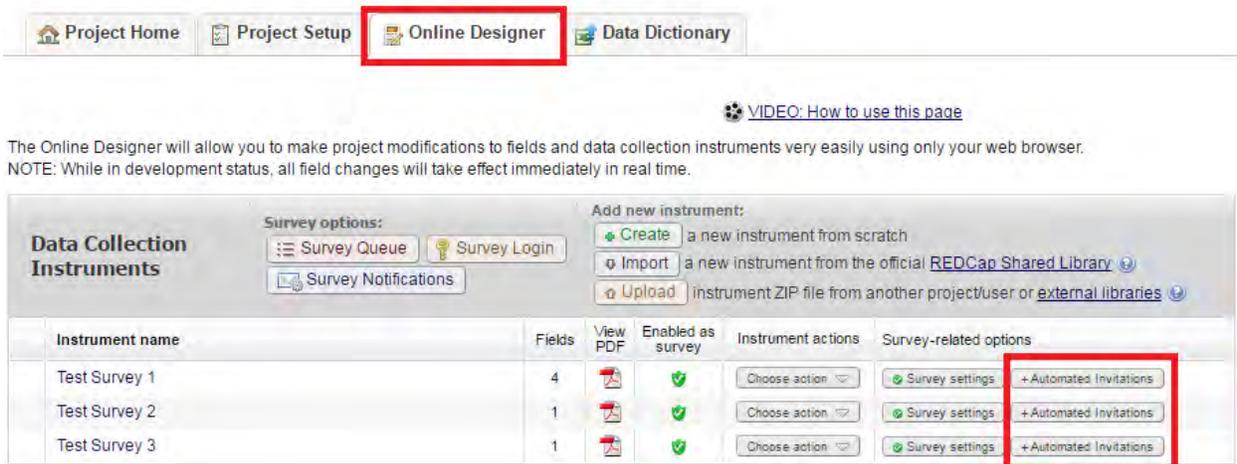
Option 2: Using the participant list to begin the automatic survey invitations

Step 1:

- To create automatic survey invitations, first enable the forms to be used as surveys.

Step 2:

- On the Online Designer tab, click on 'Automated Invitations' for the first survey to be sent with the automated invitation.



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.

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Test Survey 1	4			Choose action	Survey settings + Automated Invitations
Test Survey 2	1			Choose action	Survey settings + Automated Invitations
Test Survey 3	1			Choose action	Survey settings + Automated Invitations

Step 3:

- Define the conditions for the survey – Compose the message, define the conditions, set the time for the invitation to be sent, optional: enable reminders to be sent if the survey is not completed, and finally activate the survey invitation.

In this example, we will send the Satisfaction Survey immediately after the Demographics Survey is completed.

Step 4:

- Navigate to the *Manage Survey Participants* link, then the *Participant List* tab. Click on 'Add Participants' to begin building the participant list.

Step 5: Enter the email addresses, one per line.

- Note: If you want to enable the Participant Identifier option, click on 'enable' before entering the email addresses. As you are entering emails, you can add an identifier behind the email address using a comma as the separator. For example: **ctsiredcap@gwu.edu, REDCap Admin**

Add Emails to Participant List



Copy and paste your list of participant email addresses, **one per line**.

```
ctsiredcap@wakehealth.edu  
test@test.com  
abc@abc.com
```

Each participant starting on a new line

Example #1: john.williams@hotmail.com

Example #2: jimtaylor@yahoo.com

Example #3: putnamtr@gmail.com

Add participants

Cancel

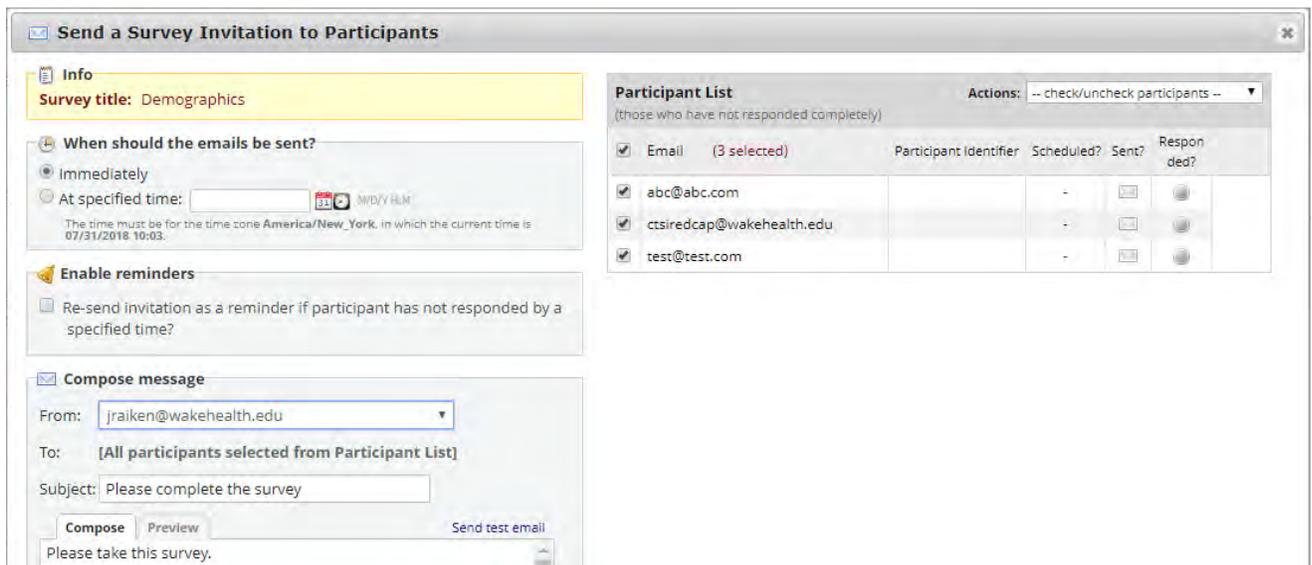
The names will then appear in the Participant List chart.

Email	Record	Participant Identifier Enable	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
abc@abc.com		Disabled		-			remove
ctsiredcap@wakehealth.edu		Disabled		-			remove
test@test.com		Disabled		-			remove

Step 6:

- Click on 'Compose Survey Invitations.' This will open a pop-up box where you can complete the invitation information.

Note: When using the Participant List to email survey links, the link is specific to the participant. Please encourage the participants **not** to forward their emails with the link to other participants.



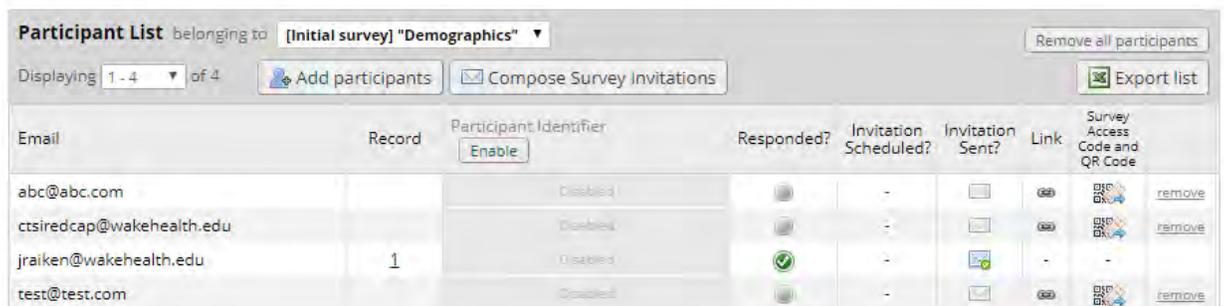
Observations:

- As participants complete the initial survey, the Participant List will have a green bubble with a checkmark in the 'Responded?' column.

Manage Survey Participants



The Participant List option allows you to **send a customized email** to anyone in your list and **track who responds to your survey**. It is also possible to identify an individual's survey answers, if desired, by providing an Identifier for each participant (this feature must first be enabled by clicking the 'Enable' button in the table below). Note: All survey responses collected are considered anonymous unless you 1) are using Participant Identifiers or 2) have enabled the designated email field for invitations. [More details](#)



- On the Survey Invitation Log, we can see that the 'view past invitations' show the automatic email have been sent.

Manage Survey Participants

- [Public Survey Link](#)
[Participant List](#)
[Survey Invitation Log](#)

Listed below are the survey invitations that have already been sent or have been scheduled to be sent to survey participants in this project. For each invitation it displays the participant email, participant identifier (if exists), survey name, and the date/time in which the invitation was (or will be) sent. You may even view the invitation email itself by clicking the icon in the 'View Email' column. Please note that all times below correspond to the time zone "America/New_York", in which the current time is 07/31/2018 10:16am.

Survey Invitation Log
(in ascending order by time sent)

Displaying 1 - 2 of 2

[View past invitations](#)

[View future invitations](#)

Begin time: End time: 07/31/2018 10:16 (M/D/Y H:M)

Display: All invitation types and All response statuses

Display: All surveys

Display: All records

Display invitation reminders?

[Apply filters](#) [Reset](#) [Download log \(as seen below\)](#) [Delete all selected](#)

Invitation send time	View Invite	Participant Email	Record	Participant Identifier	Survey	Survey Link	Responded?	Errors (if any)	
07/31/2018 10:13am		jraiken@wakehealth.edu	1		Demographics	-			
07/31/2018 10:14am		jraiken@wakehealth.edu	1		Satisfaction Survey				

REDCap – How to enable and use the Biomedical Ontology Field

An ordinary text field on a survey or data entry form can have a special feature enabled that provides auto-suggest functionality for real-time searching within biomedical ontologies, such as RxNorm, ICD-9, ICD-10, Snomed CT, LOINC, etc.

To enable a field for the Biomedical Ontology use:

1. Create a Text Box Field.
2. Enable searching within a biomedical ontology: select the ontology you would like to use from the drop-down list. Once a selection is made from this drop-down list, the only values that will be saved in this field will be values from the search list. You will not be able to type any free-form text into this field unless it is a valid value from the search list.

Add New 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: Text Box (Short Text, Number, Date/Time, ...)

Field Label

Diagnosis

Variable Name (utilized in logic, calcs, and exports)

diagnosis Enable auto naming of variable based upon its Field Label?

ONLY letters, numbers, and underscores

How to use [Smart Variables](#) [Piping](#)

Validation? (optional) ---- None ----

- or -

Enable searching within a biomedical ontology [?](#)

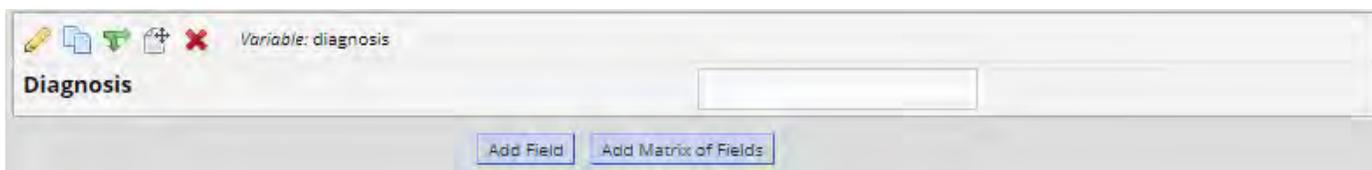
-- choose ontology to search --

-- choose ontology to search --

- AAO - Amphibian Gross Anatomy Ontology
- AAT - Art & Architecture Thesaurus
- ABA-AMB - Allen Brain Atlas (ABA) Adult Mouse Brain Ontolc
- ABD - Anthology of Biosurveillance Diseases
- ACGT-MO - Cancer Research and Management ACGT Master
- ADALAB - AdaLab ontology
- ADALAB-META - AdaLab-meta ontology
- ADAR - Autism DSM-ADI-R ontology
- ADMIN - Nurse Administrator
- ADO - Alzheimer's disease ontology
- ADW - Animal Natural History and Life History Ontology
- AEO - Anatomical Entity Ontology
- AERO - Adverse Event Reporting Ontology
- AGRO - AGRonomy Ontology

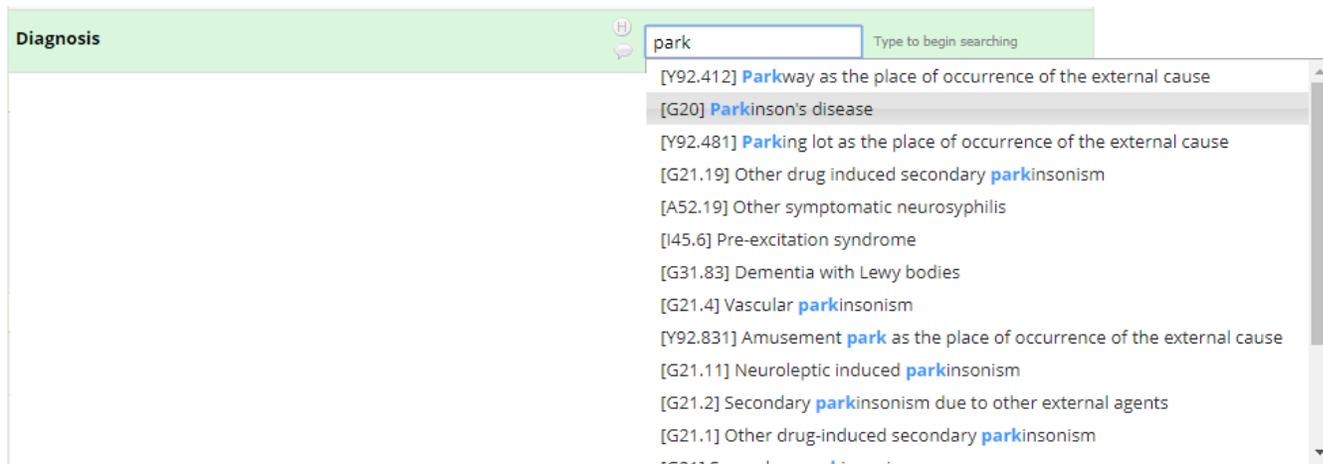
Some commonly used biomedical ontologies are:

- a. CPT
 - b. ICD 9 CM
 - c. ICD 10 CM
 - d. ICD 10 PCS
 - e. LOINC
 - f. NCFRT
 - g. RxNORM
 - h. SNOMEDCT
3. **Field Label:** Name the field with a label or question that best represents the ontology selected. For example, you could name the field as the selected ontology or with a question such as, “What is the patient diagnosis?”
 4. **Variable name:** Provide a variable name that describes what you are capturing, but try to keep the variable name as short as possible. For example, you could use the ontology name (ex: rxnorm) as the variable name.
 5. Click on **Save** for the field type.



6. The new field is now a dynamic field. When you begin typing in a keyword into the field, the system will automatically generate a drop down of selections based on the ontology and keyword.

For example, the ICD10CM ontology was selected for the field below. When entering a keyword of ‘*park*’ for Parkinson’s disease into this field, notice the drop-down list that begins to generate.



When the selection is made for Parkinson’s disease, the field will prefill with the disease in red letters with the correct code.

Data Entry view:

Diagnosis	<input type="text" value="Parkinson's disease"/>	G20
------------------	--	------------

7. The data export Excel fields will appear as this:

- CSV/Microsoft Excel (labels) output:

	A	J
1	Record ID	Diagnosis
3	2	Parkinson's disease

- CSV/Microsoft Excel (raw data) output:

The raw value that is saved for the field is the 'notation' (often an alpha-numeric code) for the given ontology.

	A	J
1	record_id	diagnosis
3	2	G20

REDCap – How to Copy Instruments from One Project to Another

If you have an instrument in Project #1 that you have created and would like to use in Project #2, you can copy the instrument from your original project via downloading the instrument ZIP file and then uploading that file into your new project.

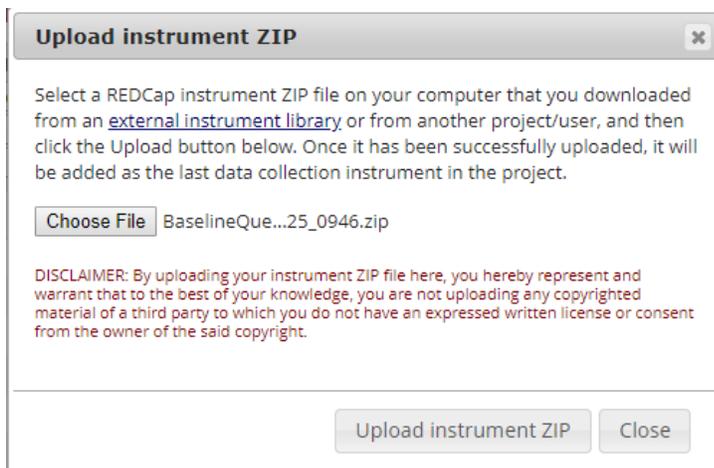
- Navigate to the Online Designer in Project #1, and click on the “Choose action” dropdown button next to the instrument you would like to copy. In the example below, we are copying in the instrument, “Baseline Questionnaire.” Select “Download Instrument ZIP.”



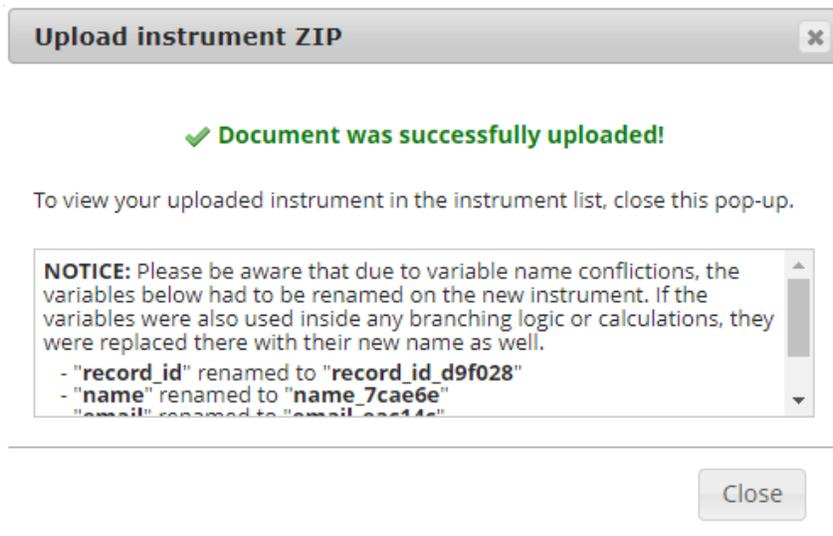
- Save the ZIP file to your computer and note the folder that you saved it in.
- Open Project #2, and navigate to the Online Designer. Click on the “Upload” button under the “Add new Instrument” header.



- A popup window will appear. Select the “Choose File” button, and locate the ZIP file that you previously saved to your computer.



- After selecting your ZIP file, click “Upload instrument ZIP.” You should then see a popup window that says the document was successfully uploaded. If there were any variables name in your uploaded instrument that already existed in Project #2, REDCap will automatically rename those variables and will notify you here.



- The instrument will appear at the bottom of your list of instruments, but you can drag it to appear anywhere in the list.
- Note: If the copied instrument was a survey, the survey settings will not copy over to the new project. You will need to re-enable the survey functionality and set the appropriate survey settings in the new project.

REDCap – How to create a new project using a Data Dictionary from another project

To create a project using a Data Dictionary from another REDCap project:

- Create the shell of a Project by entering and selecting the appropriate information then click “Save & Proceed.”
Note: Be sure to select “Create an empty project (blank slate)” for the Start Project question.

Project Title

Brief Description

What is the purpose of this project?

Start project from scratch or begin with a template?
 Use a template (choose one below)
 Create an empty project (blank slate)

Are you working with external collaborators who need access to this project? (please note that you can import/export data with REDCap so external collaborators may not need direct access to REDCap)

OR

- From the Project Setup tab, click on the Data Dictionary.

Project Home | **Project Setup** | Other Functionality | Project Revision History

Project status: Development Completed steps 0 of 7

Design your data collection instruments

Not started 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), in which you may use either method or both. Quick links: [Download PDF of all data collection instruments](#) OR [Download the current Data Dictionary](#)

Go to or

You may also browse for pre-built data collection instruments in the

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

- Once on the Data Dictionary tab, select “Choose File” and then select the Data Dictionary from your saved files.
Note: Please be sure the Data Dictionary is saved in a .csv format prior to upload.

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

This module will allow you to create new data collection instruments/surveys or edit existing ones. Changes may be made by either using the **Online Designer** or **Upload Data Dictionary** (see tabs above), in which you may use either method or both. The Online Designer may help you get some initial fields/forms built quickly or to make quick edits, but using the Data Dictionary file may be more helpful if you will be adding a large number of fields for this project.

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.

Need some help?

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](#) 
- 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:

Data Diction... 1 test.csv

- Review the notification box for any warnings or errors. Once these are addressed, click "Commit Changes" to complete the upload process.

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

This module will allow you to create new data collection instruments/surveys or edit existing ones. Changes may be made by either using the **Online Designer** or **Upload Data Dictionary** (see tabs above), in which you may use either method or both. The Online Designer may help you get some initial fields/forms built quickly or to make quick edits, but using the Data Dictionary file may be more helpful if you will be adding a large number of fields for this project.

 **Your document was uploaded successfully and awaits your confirmation below.**

- No errors or warnings were found in the document.
- The uploaded data dictionary **contains 10 fields**, which will replace the 1 fields that currently exist in the project (excluding 'Form Status' fields, which are automatically generated by REDCap).

Are you ready to commit the changes to the project from the uploaded Data Dictionary?

(Click the button below to submit the changes.)

- A successful message will display if the commitment was successful.
- Return to the Project Setup tab to continue creating or editing the project.

REDCap – Data Access Groups (DAG)

Data Access Groups (DAGs) restrict viewing of data within a database. A typical use of DAGs is a multi-site study where users at each site should only be able to view data from their site but not any other sites. Users at each site are assigned to a group and will only be able to see records created by users within their group.

- To create a Data Access Group, go to the *User Rights* application and then click on the “Data Access Groups” tab.
- Enter the Group Name and select ‘Add Group.’
- The Group Name will then appear in the Data Access Groups table. You can add as many DAGs as needed.



 [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.



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

 Assign user to

Data Access Groups	Users in group	Number of records in group	Unique group name (auto-generated)	Delete group?
Test Group A		0	test_group_a	
[Not assigned to a group]	mahankin (Meredith Hankins) * Can view ALL records	3		

Adding a user to a DAG:

- All users must first be added to the project on the *User Rights* page. Once the users have been added to the project, you can then assign them to a Data Access Group. To assign a user, navigate back to the “Data Access Groups” tab and click on the dropdown beside ‘Assign User.’ Select the appropriate username and then select the appropriate Data Access Group from the next dropdown list. Then click on “Assign.”
- The username will then appear within the ‘Users in group’ column of the Data Access Group table.

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

Enter new group name

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

Assign user to

Data Access Groups	Users in group	Number of records in group	Unique group name (auto-generated)	Delete group?
Test Group A	mharbour (Mary Beth Barrack)	0	test_group_a	X
[Not assigned to a group]	mahankin (Meredith Hankins) * Can view ALL records	3		

- If you are a Data Access Group member and are creating a record, the record will automatically be assigned to your Group.
- If you are a Global User (i.e., you are not assigned to a DAG) and are creating a record but need to add that record to a Data Access Group, select the group from the 'Assign a record to a Data Access Group?' dropdown list. Complete the record information and click 'Save Record.'

Basic Demography Form

Assign record to a Data Access Group?

Adding new Study ID 557

Study ID 557

Contact Information

First Name

Last Name

Additional Information:

- Any user not assigned to a group has global access within the project. This type of unassigned user can access all records in the project.
 - Global Access User - To see a list of the records within a Data Access Group, navigate to the Record Status Dashboard. Select a group from the dropdown list for 'Displaying Data Access Group.' The Dashboard will reflect only those records within the specified Data Access Group.
 - Group Member - If you are a DAG group member, the records on this page will include only those within the group you are assigned.
- Record creation:

If the project has record auto-numbering enabled, then when a DAG member creates a record, a unique DAG ID is prepended to the record number.

 - In the example below, records 1-6 were created by a Global Access User.
 - A DAG member of Test Group A created the bottom two records. Notice on the Global Access record list that those records have a unique ID appended to the record ID as compared to the records entered by the Global Access User.

- The DAG member can only see records that were created by him/herself, records that were created by other members of the same DAG, or records that were created by the Global Access User AND were assign to his/her DAG.
- The Global Access User can see ALL project records, regardless of DAG.

Displaying Data Access Group **-- ALL --** ▼
 Displaying record "1" through "122-2" ▼ of 8 records

Displaying Data Access Group **Test Group A** ▼
 Displaying record "122-1" through "122-2" ▼ of 2 records

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

Record ID	My First Instrument	My Second Instrument
1		
2		
3		
4		
5		
6		
122-1		
122-2		

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

Record ID	My First Instrument	My Second Instrument
122-1		
122-2		

- As noted above, Global Access Users can manually assign a record to a Data Access Group.
 - To assign a record, open the record’s instrument and select the DAG in the top right corner.
 - The record ID will remain the same. However, the Global Access User can change the record ID to add the prepended Data Access Group ID. Note: The Global Access User must have the appropriate user rights to “Rename Records” in order to change the record ID.
 - A Data Access Group ID is created for each group. Ensure the correct prepended ID is used when editing the record ID.

Record Home Page

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

Choose action for record ▼

- Download PDF of record data for all instruments
- Download PDF of record data for all instruments (compact)
- Lock all instruments across all events
- Unlock all instruments across all events
- Assign to Data Access Group
- Rename record
- Delete record (all forms)

Legend for status icons:

- Incomplete Incomplete (no data saved) ?
- Unverified
- Complete

Rename record "557"



Rename record "557" to the following record name:

122-7

Rename record

Cancel

REDCap – How to import data from an Excel file

- Create the project and fields/questions within REDCap.
 - Note: Before importing real data, move the project to PRODUCTION status.
- Once the project is in Production, navigate to the *Data Import Tool*.
- Please review the detailed instructions on the Data Import Tool page.

Project status: **Production**

Data Collection

- Manage Survey Participants
- Record Status Dashboard
- Add / Edit Records
- Show data collection instruments ▼

Applications

- Calendar
- Data Exports, Reports, and Stats
- Data Import Tool**
- Data Comparison Tool
- Logging
- Field Comment Log
- File Repository
- User Rights and DAGs
- Data Quality
- External Modules

Reports [Edit reports](#)

- 1) Test Report

Help & Information

- Help & FAQ
- Video Tutorials
- Suggest a New Feature
- CTSI How To Guides

[Contact REDCap administrator](#)

Data Import Tool

This module may be used for importing data into this project from a CSV (comma delimited) file or alternatively from an XML file in CDISC ODM format. Below are the steps you will need to follow in order to import your data successfully into this project.

CSV import CDISC ODM (XML) import

Instructions:

- 1.) Click the link below to download your data import template as a CSV (comma delimited) 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 \(with records in columns\)](#)
- 2.) In each column of the Data Import Template file that you downloaded, place the data for each record that you wish to import. Once all your data has been added, save the file.
 - Be sure not to change the Variables/Field Names in the file or an error may occur.
 - Also, for all of the 'dropdown' or 'radio' fields in the project, you must make sure that the numerical value (rather than the text value) is entered in those cells, or else it cannot be processed.
 - Any empty rows or columns in the file can be safely deleted before importing the file. Doing this reduces the upload processing time, especially for large projects.
- 3.) Click the 'Browse' or 'Choose File' button below to select the file on your computer, and upload it by clicking the 'Upload File' button.
- 4.) Once your file has been uploaded, the data will NOT be immediately imported but will be displayed and checked for errors to ensure that all the data is in correct format before it is finally imported into the project.

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

Format for date and datetime values:

Allow blank values to overwrite existing saved values?

Name the imported records automatically (force record auto-numbering) ?

Upload your CSV file:

No file chosen

- Download the Data Import Template.
- Save the Data Import Template locally to your computer. Begin completing the template with the data to be imported.
 - Note: Each record will need a RECORD ID before the data can be imported.
 - Save the file in the **.CSV (comma delimited)** format.

To follow is an example:

	A	B	C	D	E	F	G	H	I	J
1	record_id	date	report	receive_time	dispatch_time	enroute_time	onscene_time	incident_close	disposition	location
2	1abc	1/5/2015	Emergency	1/5/2015 9:39	9:40:00 AM	9:49:00 AM	9:52:00 AM	10:00:00 AM	No treatment, No Transport	2
3	2abc	1/19/2015	Non-Emergency	1/19/2015 12:07	12:08:00 PM	12:12:00 PM	12:18:53 PM	12:43:24 PM	No treatment, No Transport	2
4	3abc	2/1/2015	Emergency	2/1/2015 11:57	11:57:00 AM	12:00:00 PM	12:04:00 PM	12:45:00 PM	No treatment, No Transport	2
5	4abc	2/5/2015	Emergency	2/5/2015 12:42	12:42:30 PM	12:46:00 PM	12:48:00 PM	1:15:15 PM	No treatment, No Transport	2
6	5	2/9/2015	Emergency	2/9/2015 9:16	9:16:30 AM	9:24:00 AM	9:28:00 AM	10:49:42 AM	No treatment, No Transport	2
7	6	2/9/2015	Non-Emergency	2/9/2015 9:16	9:16:30 AM	9:24:00 AM	9:28:00 AM	10:49:42 AM	No treatment, No Transport	2
8	7	2/18/2015	Emergency	2/18/2015 16:53	4:55:00 PM	5:08:00 PM	5:10:00 PM	5:46:00 PM	No treatment, No Transport	2
9	8	2/19/2015	Emergency	2/19/2015 20:40	8:40:00 PM	8:55:38 PM	8:57:41 PM	9:14:57 PM	No treatment, No Transport	2
10	9	2/23/2015	Non-Emergency	2/23/2015 18:19	6:20:00 PM	6:27:00 PM	6:30:00 PM	6:46:00 PM	No treatment, No Transport	2
11	10	2/24/2015	Non-Emergency	2/24/2015 8:15	8:16:00 AM	8:22:00 AM	8:26:00 AM	9:00:00 AM	No treatment, No Transport	2

- Once the data is ready to be imported, navigate back to the *Data Import Tool*. Click on ‘Choose File.’
 - Select the file then and select Upload File.
- Review the import for any errors.

✔ 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
- Red box = error
- Orange box = warning

DATA DISPLAY TABLE									
record_id	date	report	receive_time	dispatch_time	enroute_time	onscene_time	incident_close	disposition	location
1abc (new record)	1/5/2015	Emergency	1/5/2015 9:39	9:40:00 AM	9:49:00 AM	9:52:00 AM	10:00:00 AM	No treatment, No Transport	2
								No	

- When you have finished reviewing, click on ‘Import Data.’

Do you wish to import the new data (displayed above) into the project?
(Click the button below to import the data.)

Best Practices when importing:

- When importing date fields, ensure all dates for the variable are in the same format.
- Text can only be imported into Text Box (Short Text) or Notes Box (Paragraph Text) fields.
- When importing multiple choice (Single Answer radio button or dropdown), ensure the **raw value** that correlates to the appropriate text selection is in the field associated with the variable name. You cannot import the text (label) values into multiple choice fields.

REDCap – Creating a report

The Report Builder allows a user to create customized reports that are queried in real time.

How to create a report:

- Click on the “Data Exports, Reports, and Stats” hyperlink located on the left navigation bar.
- Click on “Create New Report.”
 - Enter a Name for the Report.
 - User Access:
 - All Users refers to all users that have access to the project.
 - Custom User Access allows a user to restrict viewing access to certain users.
 - Note: If a particular report’s access is restricted **from** a user who has ‘Add/Edit Reports’ rights on the User Rights section, then that user will still be able to view and edit the report.

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)

- Fields to include: Select the fields to be included in the report. There are three (3) ways to add fields to the report:
 - Quick Add is a checklist format of all the fields/variables within the project. A user can check the boxes for the variables individually.
 - Add all fields from the selected instrument is a quick way to add **all** the fields/variables from a particular form.
 - Dropdown list: click on the blue arrow, then the field to the left becomes a dropdown list of all the variables within the project.
 - Surveys: if you would like the survey identifier (if used) and survey timestamp fields included in the report, then click the checkbox.

In this example, we want to see the following fields on the report:

Study ID, Name, Date of Birth, Gender, Pregnant, and Candy

STEP 2

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

Field 1	study_id "Study ID"	[REDACTED]	Instrument: Demographics	X
Field 2	name "Name"	[REDACTED]	Instrument: Demographics	X
Field 3	dob "Date of Birth"	[REDACTED]	Instrument: Demographics	X
Field 4	gender "Gender"	[REDACTED]	Instrument: Demographics	X
Field 5	preg "Pregnant?"	[REDACTED]	Instrument: Demographics	X
Field 6	candy "What is your favorite type of candy?"	[REDACTED]	Instrument: Test 3	X
Field 7	Type variable name or field label	[REDACTED]		

Additional fields to include in report (optional)

Include the survey identifier field and survey timestamp field(s)?

- Filters (optional): This section allows a user to filter the report for certain information.
 - Example: We only want individuals born on 8/22/2016 and 8/23/2016.

Filters:

STEP 3

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

Filters (optional) **Operator / Value**

Filter 1	dob "Date of Birth"	[REDACTED]	=	08-22-2016	[31] M-D-Y	X	
OR	Filter 2	dob "Date of Birth"	[REDACTED]	=	08-23-2016	[31] M-D-Y	X
AND							
Filter 3	-- select a field --	[REDACTED]					

Switch format: [Use advanced logic](#)

Results:

Demographics

Study ID (study_id)	Name (name)	Date of Birth (dob)	Gender (gender)	Pregnant? (preg)	What is your favorite type of candy? (candy)
5	5	08-23-2016	Male (1)		Hershey's Kisses (3)
Johnson, Joe	Johnson, Joe	08-22-2016	Male (1)		Snickers (1)
test	test	08-22-2016	Male (1)		M&Ms (5)
Test	Test	08-23-2016	Female (2)	No (0)	
test 2	test 2	08-22-2016	Female (2)	No (0)	Three Musketeers (2)
Test Form	Test Form	08-23-2016	Male (1)		Three Musketeers (2)
Test Test	Test Test	08-22-2016	Female (2)	No (0)	
Testing	Testing	08-23-2016	Female (2)	No (0)	

- Live Filters (optional): Live filters can be used on the report page for filtering data in real time. Only multiple choice fields can be used with these filters. Up to three (3) live filters can be assigned.
 - In this example, we have assigned 'Gender' and 'What is your favorite candy?'

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	gender "Gender" ▼
Live Filter 2	candy "What is your favorite type of candy?" ▼
Live Filter 3	-- select a field -- ▼

- Order the Results (optional): The results will automatically order by Record ID unless indicated otherwise.
 - In this example, we selected the order by 'Name'

STEP 4

Order the Results (optional)

First by	name "Name" ▼	ABX	Ascending order ▼
Then by	Type variable name or field label		Ascending order ▼
Then by	Type variable name or field label		Ascending order ▼

- Click on 'Save' for the report.
- Based on the examples in this guide, here is the report.

Number of results returned: **8**
Total number of records queried: 11

[Stats & Charts](#)
[Export Report](#)
[Print Page](#)
[Edit Report](#)

Live filters: [Gender] ▼ [What is your favorite type of candy? ▼]

Demographics

Study ID (study_id)	Name (name)	Date of Birth (dob)	Gender (gender)	Pregnant? (preg)	What is your favorite type of candy? (candy)
5	5	08-23-2016	Male (1)		Hershey's Kisses (3)
Johnson, Joe	Johnson, Joe	08-22-2016	Male (1)		Snickers (1)
test	test	08-22-2016	Male (1)		M&Ms (5)
Test	Test	08-23-2016	Female (2)	No (0)	
test 2	test 2	08-22-2016	Female (2)	No (0)	Three Musketeers (2)
Test Form	Test Form	08-23-2016	Male (1)		Three Musketeers (2)
Test Test	Test Test	08-22-2016	Female (2)	No (0)	
Testing	Testing	08-23-2016	Female (2)	No (0)	

- The live filters allow a user to further filter the report results. For example, of the results, we only want to see individuals who like Three Musketeers.

Number of results returned: 2
Total number of records queried: 11

[Stats & Charts](#) [Export Report](#) [Print Page](#) [Edit Report](#)

Live filters: [Gender] **Three Musketeers** [Reset](#)

Demographics

Study ID (study_id)	Name (name)	Date of Birth (dob)	Gender (gender)	Pregnant? (preg)	What is your favorite type of candy? (candy)
5 test 2	test 2	08-22-2016	Female (2)	No (0)	Three Musketeers (2)
8 Test Form	Test Form	08-23-2016	Male (1)		Three Musketeers (2)

REDCap – How to Download the Data Dictionary

- Navigate to the Project Setup tab, click on the Data Dictionary.



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 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

- Once on the Data Dictionary tab, select 'Download the current Data Dictionary.'

 Project Home  Project Setup  Online Designer  Data Dictionary

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

This module will allow you to create new data collection instruments/surveys or edit existing ones. Changes may be made by either using the **Online Designer** or **Upload Data Dictionary** (see tabs above), in which you may use either method or both. The Online Designer may help you get some initial fields/forms built quickly or to make quick edits, but using the Data Dictionary file may be more helpful if you will be adding a large number of fields for this project.

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.

Need some help?

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](#) 
- 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:

No file chosen

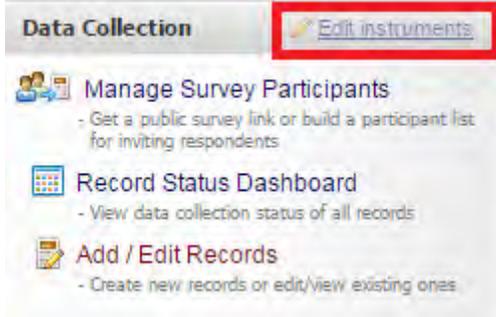
- The file will download in a .csv format.

REDCap – Edit a field

- If the project is in development mode, please follow the steps below.
- If the project is in production mode, please refer to the the *Making Changes while in Production Guide*.

Step 1:

- Click on Edit Instruments



- Select the instrument to edit and then click on the pencil icon



- Select the pencil icon on the field you would like to edit.



- The field will open in edit mode where the question and any details may be edited. Make the necessary changes and click save.

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: Text Box (Short Text, Number, Date/Time, ...) ▼

Question Number (optional)
Displayed only on the survey page.

Field Label

Action Tags / Field Annotation (optional)

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

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

How to use [Smart Variables](#) [Piping](#)

Validation? (optional) ---- None ---- ▼
 – OR –

Enable searching within a biomedical ontology [?](#)
 ▼

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

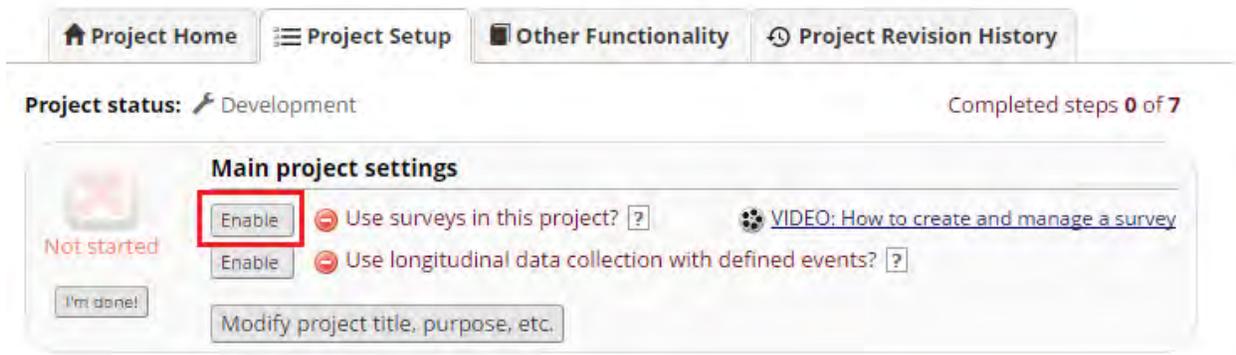
- The pop-up box will close and return to the list of fields for the instrument.

✎
📄
📌
✚
✖
Variable: pass

Did the student pass the test?

REDCap – Enable an Instrument as a Survey

- Step 1: On the Project Setup page and under “Main project settings,” select the Enable button next to “Use surveys in this project?”



- Step 2: Create your data collection instrument. Once you have created your instrument, go to the Online Designer and select the Enable button next to your instrument name, under the “Enabled a survey” column header.

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.



- This will bring you into the Survey Settings, where you can give your survey a title, add survey instructions, edit the survey design options, and add other survey customizations.

You may utilize any data collection instrument as a survey by enabling the instrument on this page. Data may still be collected on the instrument via normal data entry on the form, but enabling it as a survey allows for the additional option of collecting data via survey by respondents.

Set up my survey for data collection instrument "Demographics" Cancel

Basic Survey Options:

Survey Title
My First Instrument
Title to be displayed to participants at the top of the survey page

Survey Instructions
(Displayed at top of survey after title)
Please complete the survey below.
Thank you!

Survey Design Options:

Logo
(Optional: display an image above the survey title)
Add new logo:
 No file chosen
(Images wider than 600 pixels will be downsized to fit page.)
 If using a logo, hide survey title on survey page?

- When you are finished editing your survey settings, scroll down to the bottom of the page and select "Save Changes." Your instrument is now enabled as a survey.

Send confirmation email (optional)?
(Email the respondent when they complete the survey)

REDCap – How to import documents from the REDCap Shared Library (Adaptive Instruments)

- Click on the Project Setup tab and select ‘Online Designer.’

Project status: Development Completed steps 0 of 7

Main project settings

Not started [VIDEO: How to create and manage a survey](#)

Use surveys in this project? [?](#)

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

Design your data collection instruments & enable your surveys

Not started

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 or Explore the

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

Learn how to use

- Select ‘Import’ under ‘Add new instrument.’

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

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

Survey options:

Add new instrument:

- a new instrument from scratch
- a new instrument from the official [REDCap Shared Library](#)
- Instrument ZIP file from another project/user or [external libraries](#)

- Enter keywords into the search box then click on ‘Search the library.’

Logged in as **Meredith Hankins** (Wake Forest School of Medicine)

Keyword search:

Search options:

Minimum downloads:

Recent additions:

Curated by REDLOC?

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 >>

Shared Library

Library Metrics

-
-
-

REDLOC

-

- Select the correct form from the list then click on 'Import into my REDCap project.'

The screenshot shows the details for the instrument 'Neuro-QOL Bank v1.0 - Ability to Part. in SRA'. The page includes a 'Downloads' column with the number '25'. The 'Details' section contains the following information:

- Institution:** REDLOC
- Contact:** Brenda Minor
- Contact email:** brenda.minor@vanderbilt.edu
- Submitted by:** Brenda Minor
- Description:** Neuro-QOL Bank v1.0 - Ability to Part. in SRA
For information on how to interpret CAT scores, see [Scoring Manuals](#).
- Acknowledgement:** Acknowledgment: David Cella, Assessment CenterSM, and the PROMIS Health Organization on behalf of the National Institute for Neurological Disorders and Stroke (NINDS) [View full acknowledgment](#)
- Terms of use:** TERMS AND CONDITIONS FOR USE OF NEURO-QOL INSTRUMENTS 6/24/2013

Neuro-QoL instruments measuring a variety of domains are available for adult and pediatric self-report in English and Spanish (see www.neuroqol.org).

ANY PUBLICATION OR PRESENTATION OF RESULTS OBTAINED FROM STUDIES CONDUCTED USING THESE INSTRUMENTS SHOULD INCLUDE A STATEMENT THAT INDICATES WHICH NEURO-QOL INSTRUMENTS WERE USED, AND REFERENCE THE NEURO-QOL WEBSITE (WWW.NEUROQOL.ORG) FOR FURTHER INFORMATION.

PERMISSION TO USE NEURO-QOL INSTRUMENTS DOES NOT GRANT PERMISSION TO MODIFY THE WORDING OR LAYOUT OF ITEMS, TO DISTRIBUTE TO OTHERS, OR TO TRANSLATE ITEMS INTO ANY OTHER LANGUAGE. SUCH PERMISSION TO MODIFY, DISTRIBUTE, OR TRANSLATE MUST BE REQUESTED FROM THE NEURO-QOL WEBSITE.

COPYRIGHT NOTICE
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- Last updated:** May 1, 2015

On the right side, there are links for 'View as web page' and 'View as PDF'. A red box highlights the 'Import into my REDCap project' button.

- Read the Shared Content Agreement then at the bottom, click on the 'I agree with the terms of use' and click 'I Agree.'

The screenshot shows a 'Shared Content Agreement' dialog box. The text inside the dialog box is identical to the 'Terms of use' section in the previous screenshot. At the bottom of the dialog box, there is a checkbox labeled 'I agree with the terms of use' which is checked. A red box highlights this checkbox. Below the checkbox, there are two buttons: 'I agree' and 'I do not agree'. The 'I agree' button is highlighted with a red box.

- Review the REDCap Notice that no changes can be made to the document. You can adjust the name of the document for your project. Click on 'Add.'

Importing instrument from the REDCap Shared Library

You have chosen to load a data collection instrument from the REDCap Shared Library. Please provide a name for your instrument and click the *Add* button to complete the import process, after which the instrument will be added to this REDCap project.

NOTE: This data collection instrument has been previously downloaded from the REDCap Shared Library. Proceeding with this process will result in a new duplicate copy being downloaded from the library and added as a new instrument in the project.

Add

the imported instrument with the name

Neuro-QOL Bank v1.0 - Ability to Part. in SRA

NOTICE: The instrument you are downloading from the Shared Library is a **computer adaptive test (CAT)**, which means that its questions are generated dynamically using previous answers. Adaptive instruments behave a little differently in REDCap than traditional instruments. For instance, once the instrument has been downloaded, you will not be able to modify any fields on the instrument at any time. The instrument will also be automatically enabled as a survey in this project, and if surveys have not yet been enabled for use in this project, then that too will be enabled. This adaptive instrument can only be taken in survey form. If the data entry form is viewed for this instrument, all fields will be displayed as read-only.

If you do NOT wish to import the instrument, you may return back to the [REDCap Shared Library](#).

Cancel

- You should receive an import successful notice. Click on 'Return to Previous Page' to return to the Online Designer.

Importing instrument from the REDCap Shared Library

The instrument was successfully imported from the REDCap Shared Library.

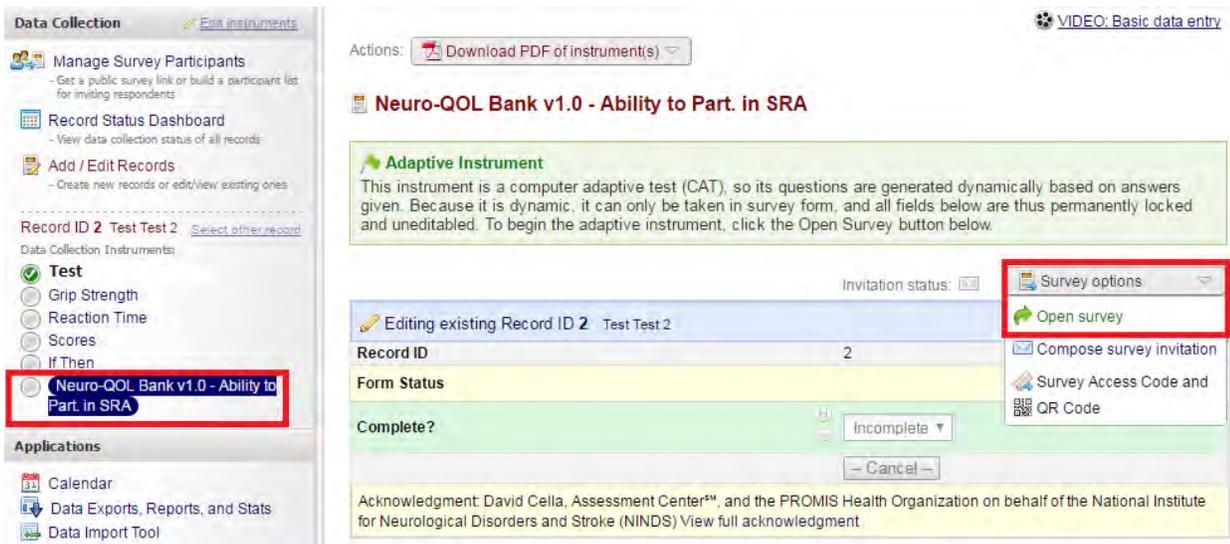
Click the link below to refresh your instrument list on the left.

[RETURN TO PREVIOUS PAGE](#)

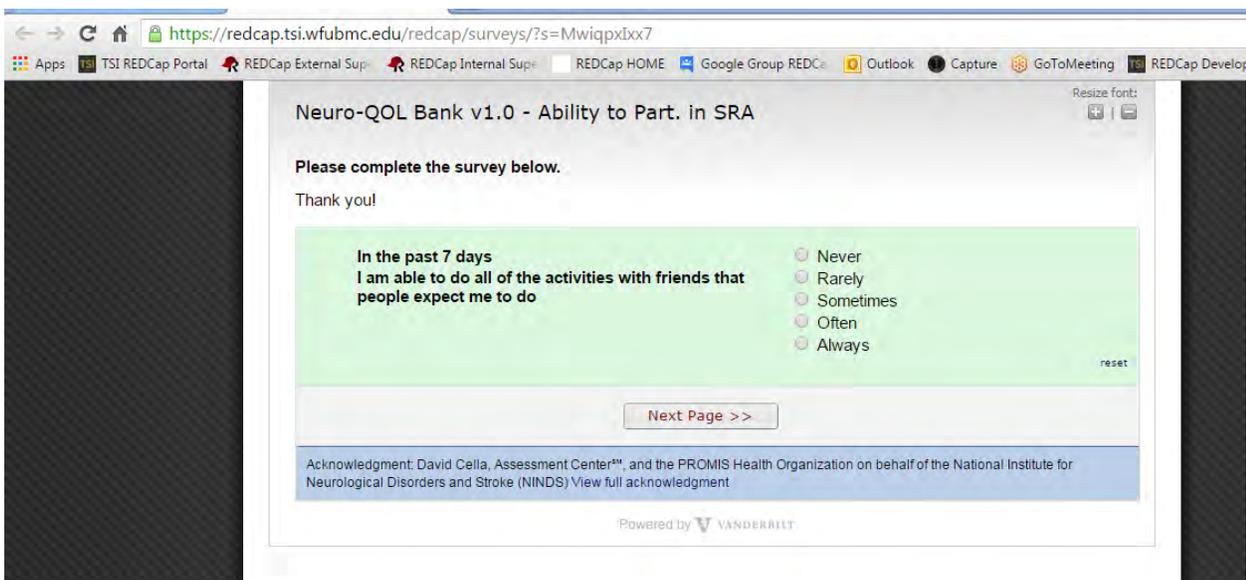
- Once you have returned to the Online Designer, you should see the imported instrument in the list.

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Test	134			Choose action	Survey settings + Automated Invitations
Grip Strength	4		Enable	Choose action	
Reaction Time	8		Enable	Choose action	
Scores	9		Enable	Choose action	
If Then	6			Choose action	Survey settings + Automated Invitations
Neuro-QOL Bank v1.0 - Ability to Part. in SRA (Adaptive)	182			Choose action	Survey settings + Automated Invitations

- The Adaptive Scoring instruments are imported as surveys and cannot be edited. To open this document for data entry, locate the patient and click on their form. In the right corner, click on Survey Options then click on Open Survey.



- The Open Survey will open the form in the Survey Format where the data entry may begin.



Longitudinal Projects in REDCap

Consider these 3 questions:

1. Will you be collecting the same data multiple times over time throughout the project?
2. Is this a structured study where participants will have a definite amount of visits over a defined period time?
3. How do you want your data to look when you export them?

Question #1: Will you be collecting the same data multiple times overtime throughout the project?

If you will be asking the same questions over a period of time, you may want to consider using the longitudinal module.

In this project, the “Monthly Clinical Data” questionnaire would be asked during all four visits/events of the study so the longitudinal study module was a good fit for this project. If the longitudinal module were not used, the fields/questions on this questionnaire would have needed to be created four times in the online designer or data dictionary in order to allow for these data to be collected.

Study ID 1 Hall, Timothy

Data Collection Instrument	Baseline (1)	Month 1 (2)	Month 2 (3)	Month 3 and Final Visit (4)
Demo Demographics Form (survey)	<input checked="" type="checkbox"/>			
Monthly Clinical Data (survey)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Completion Data				<input checked="" type="checkbox"/>

The questions on the “Monthly Clinical Data” instrument needed to be collected during all four visits/events

Question #2: Is this a structured study where participants will have a definite amount of visits over a defined period time?

- Longitudinal projects are best used for studies that are very structured and don't go on indefinitely.
- This is especially the case when the Longitudinal module is used in conjunction with the Scheduling feature.
- All events are created and defined during project development. Once a project has been moved into "Production Mode" longitudinal events cannot not be created or redefined without the assistance of a REDCap administrator.

Question #3: How do you want your data to look when you export them?

In the **traditional data collection model**, each project record is stored independently as a separate row of data, which can be seen when exported.

Below shows a spreadsheet of data for sleep variables that were collected at four time points. The sleep variables needed to be created four times within the REDCap project. Thus, each sleep variable has its own column in the data export.

Notice that the same sleep variables were repeated four times for each event

	A	D	E	K	M	N	T	V	W	AC	AE	AF	AL
				insomnia_severity	falling_staying_index_c	asleep_asleep_complete	insomnia_severity	falling_staying_index_c	asleep_asleep_complete	insomnia_severity	falling_staying_index_c	asleep_asleep_complete	insomnia_severity
1	record_id	asleep	asleep	complete	2	asleep_2	2	3	3	3	4	4	4
2	1	2	0	2	2	1	2	2	0	2	2	0	2
3	2	1	1	2	1	1	2	1	1	2	1	1	2
4	3	3	2	2	3	2	2	3	2	2	3	2	2
5	4	1	0	2	1	0	2	1	0	2	1	0	2
6													
7													

Notice that there is one row for each record

Question # 3 How do you want your data to look when you export them? *(cont.)*

For **longitudinal projects**, each row of data actually represents that particular time-point (event) per database record.

For example, if four events are defined for the project, one record will have four separate rows of data when exported. The data export will include a column "redcap_event_name" indicating the unique event name for each row.

This question in particular should be discussed with the statistician or the person carrying out the data analysis.

	A	B	E	F	L
1	record_id	redcap_event_name	falling_asleep	staying_asleep	insomnia_severity_index_complete
2	1	baseline_arm_1	2	0	2
3	2	baseline_arm_1	1	1	2
4	3	baseline_arm_1	3	2	2
5	4	baseline_arm_1	1	0	2
6	1	visit_1_arm_1	2	1	2
7	2	visit_1_arm_1	1	1	2
8	3	visit_1_arm_1	3	2	2
9	4	visit_1_arm_1	1	0	2
10	1	visit_2_arm_1	2	0	2
11	2	visit_2_arm_1	1	1	2
12	3	visit_2_arm_1	3	2	2
13	4	visit_2_arm_1	1	0	2
14	1	final_arm_1	2	0	2
15	2	final_arm_1	1	1	2
16	3	final_arm_1	3	2	2
17	4	final_arm_1	1	0	2
18					

Notice that the same sleep variables are only displayed once in the spreadsheet

Notice that there are multiple rows for each record

This column indicates the unique event name

Longitudinal Setup

Enabling longitudinal data collection will allow you to use the same form or survey at multiple events. For instance, you may create a demographics form which you will use at Baseline but then a questionnaire that you may want to use at V1, V2, and V3. If there is one form or survey that will be used multiple times for a participant, you would want to enable longitudinal data collection use.

When you enable the longitudinal data collection, you will have a step on your project setup screen that will allow you to define your events and then designate the forms you will be using at each event.

Click enable if you want a longitudinal database



When enabling longitudinal data collection, you will see this as an option. You must define your events and then designate the instruments at each event.



The screenshot shows the REDCap Project Setup interface. At the top, there are navigation tabs: Project Home, Project Setup (active), Other Functionality, and Project Revision History. Below the tabs, the project status is 'Development' and 'Completed steps 0 of 8'. The 'Main project settings' section is in progress and includes a 'Use longitudinal data collection with repeating forms?' checkbox which is checked and labeled 'Enable'. Other options include 'Use surveys in this project?' (checked 'Enable') and a video link 'VIDEO: How to create and manage a survey'. The 'Design your data collection instruments' section is also in progress and offers options to go to the 'Online Designer' or 'Upload Data Dictionary'. It also mentions the 'REDCap Shared Library' and a 'Check For Identifiers' page. The 'Define your events and designate instruments for them' section is not started and offers options to 'Define My Events' or 'Designate Instruments for My Events'.

Define your Events and Designate Instruments

After you have defined your events, you must designate instruments for events. Check the boxes where you want each form to appear. If you do not check a box for a form, it will not appear when you are entering data. Each form must be attached to at least one event.

Upload or download arms/events

Arm 1: Arm 1 +Add New Arm

Arm name: Arm 1 [Rename Arm 1](#)

	Event #	Event Name	Unique event name (auto-generated)
	1	Baseline	baseline_arm_1
	2	Month 1	month_1_arm_1
	3	Month 2	month_2_arm_1
	4	Month 3 and Final Visit	month_3_and_final_arm_1

Descriptive name for this event

Define your Events:

- Title the Event
- Create multiple arms if your project requires this



Designate Instruments for Events:
Select which Data Collection Instrument is used at each Event



|

Data Collection Instrument	Baseline (1)	Month 1 (2)	Month 2 (3)	Month 3 and Final Visit (4)
Demo Demographics Form (survey)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Monthly Clinical Data (survey)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Completion Data	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

REDCap – How to Make Changes in Production

- Step 1
 - Navigate to the Project Setup tab for the project.
 - Click on 'Online Designer' under 'Design your data collection instruments & enable your surveys.'



Complete!

[Not complete?](#)

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**

Learn how to use  **Smart Variables**  **Piping**  **Action Tags**

- Step 2
 - The system will navigate the user to the Online Designer tab.
 - Click on 'Enter Draft Mode.'

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

NOTE: The project is currently in PRODUCTION status, and thus changes cannot be made in real time to the project as when in Development status. However, changes to the project may be drafted in DRAFT MODE, after which such changes will be reviewed and approved by a REDCap administrator. Once those changes are approved, you will then receive an email confirmation informing you that those changes have taken effect on your production project.

Would you like to enter DRAFT MODE to begin drafting changes to the project?

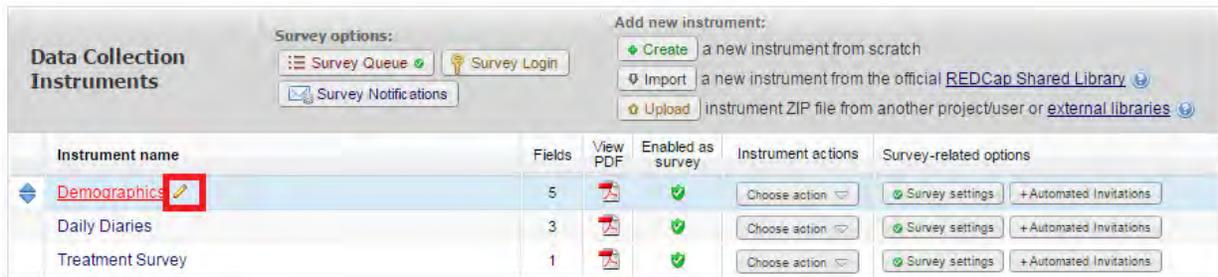
Enter Draft Mode

The system will provide a green Success notification that you have entered the Draft Mode.

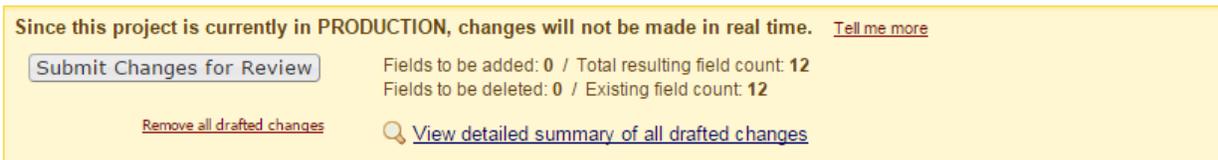
 **Success!**

The project is now in Draft Mode. When you have finished making changes to your instruments, click the 'Submit Changes for Review' button so that your changes may be approved.

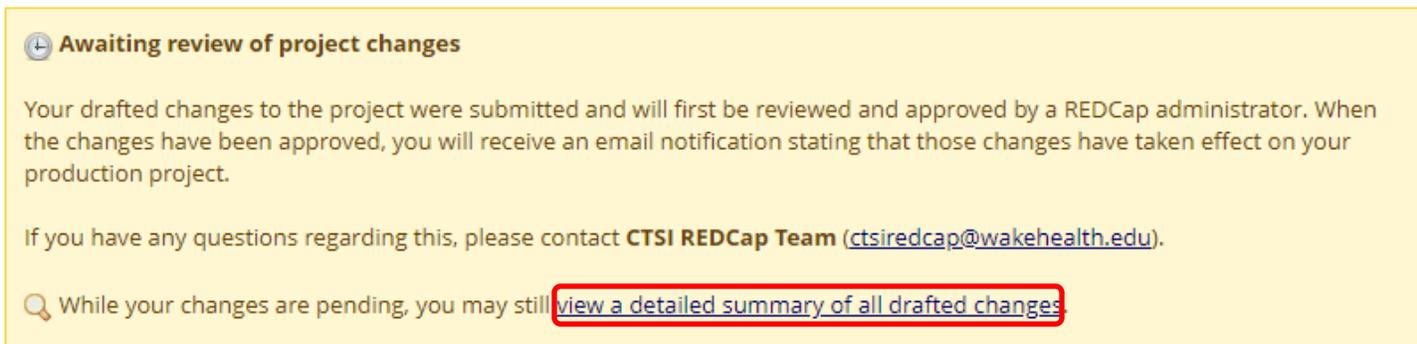
- Step 4
 - Begin making any changes to the Forms/Instruments by hovering over the Form/Instrument and clicking on the pencil icon.



- Step 5
 - Once all changes have been made. Click on ‘Submit Changes for Review.’ This selection will automatically email the CTSI REDCap Administrators and notify them that project changes have been requested.



- Step 6
 - The status of the Online Designer will change to ‘Awaiting review of project changes.’
 - The user may review the summary of submitted changes by clicking on ‘View a detailed summary of all drafted changes.’



- Step 7
 - If the CTSI REDCap Administrator has any questions regarding the changes, they will reach out to the submitter via email.
 - Once the CTSI REDCap Administrator has committed the changes, the user will be notified via email.

REDCap – How to Use the Data Dictionary (within a project)

This guide will assist with merging multiple forms (instruments) within one project into one single form (instrument).

- Step 1
 - Navigate to the Project setup tab and select 'Data Dictionary.'

Project status: Development Completed steps 0 of 7

Main project settings

Not started [VIDEO: How to create and manage a survey](#)

Use surveys in this project? [?](#)

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

Design your data collection instruments & enable your surveys

Not started

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 or Explore the

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

Learn how to use

- Step 2
 - Download the Data Dictionary and save it to your computer as a .csv file.

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

- This module will allow you to create new data collection instruments/surveys or edit existing ones. Changes may be made by either using the **Online Designer** or **Upload Data Dictionary** (see tabs above), in which you may use either method or both. The Online Designer may help you get some initial fields/forms built quickly or to make quick edits, but using the Data Dictionary file may be more helpful if you will be adding a large number of fields for this project.
- 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.
- **Need some help?** 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](#).
- 2.) Edit the Data Dictionary (see the [Help & FAQ](#) for help)
- 3.) Upload the Data Dictionary using the form below

- Step 3
 - In the "Form Name" column, the current list reflects the names of the different forms.

- To move all the variables from the various forms to one form, edit this column to reflect the form name you want to retain.
 - In this example, we want to retain the 'test' form and move all the variables from the other forms to the 'test' form.

Before

Variable / Form Name	Section	Field Type	Field Label	Choices, C	Field Note	Text Valid	Text Valid	Text Valid	Text Valid	Identifier	Branching	Required	Custom A	Question	Matrix Gr	Matrix Rai	Field Annotation
record_id	my_first_instrument	text	Record ID														
name	my_first_instrument	text	Name of participant:														
mrn	my_first_instrument	text	MRN#														
gender	my_first_instrument	radio	gender	0, male 1, female													
email	my_first_instrument	text	Email											email			
pass	my_first_instrument	radio	Did the st	1, Yes 2, No 3, Maybe 99, Retake													
where	my_first_instrument	radio	Where?	1, Classroom 2, Gym										[pass] <> '1'			
group	my_first_instrument	radio	randomiz	1, group a 2, group b													
approved	approval	yesno	approved?														
calendar2	approval	file	[calendar]														
statistics	test	yesno	statistics?														
active	test	yesno	active project?														
date	test	text	If yes, date?											[active] = '1'			
negative	test	radio	testing ne	-1, No 0, Yes -9, Maybe													
active2	test2	descriptiv	Active Project?	[august_arm_1][active]													
active3	test2	descriptiv	If yes, date?	[august_arm_1][date]													

After

Variable / Form Name	Section	Field Type	Field Label	Choices, C	Field Note	Text Valid	Text Valid	Text Valid	Text Valid	Identifier	Branching	Required	Custom A	Question	Matrix Gr	Matrix Rai	Field Annotation
record_id	test	text	Record ID														
name	test	text	Name of participant:														
mrn	test	text	MRN#														
gender	test	radio	gender	0, male 1, female													
email	test	text	Email											email			
pass	test	radio	Did the st	1, Yes 2, No 3, Maybe 99, Retake													
where	test	radio	Where?	1, Classroom 2, Gym										[pass] <> '1'			
group	test	radio	randomiz	1, group a 2, group b													
approved	test	yesno	approved?														
calendar2	test	file	[calendar]														
statistics	test	yesno	statistics?														
active	test	yesno	active project?														
date	test	text	If yes, date?											[active] = '1'			
negative	test	radio	testing ne	-1, No 0, Yes -9, Maybe													
active2	test	descriptiv	Active Project?	[august_arm_1][active]													
active3	test	descriptiv	If yes, date?	[august_arm_1][date]													

- Save the changes to your computer as a .csv file.
- Step 4
 - Return to the Data Dictionary tab and select "Choose File." Select the revised .csv file and then click on "Upload File."

Upload your Data Dictionary file (CSV file format only)

Format for min/max validation values for date and datetime fields:

No file chosen

- Step 5
 - The system will return a notification of your changes. If the changes are acceptable, click on "Commit Changes."

✔ Your document was uploaded successfully and awaits your confirmation below.

- No errors or warnings were found in the document.
- The uploaded data dictionary **contains 16 fields**, which will replace the 16 fields that currently exist in the project (excluding 'Form Status' fields, which are automatically generated by REDCap).

Are you ready to commit the changes to the project from the uploaded Data Dictionary?
(Click the button below to submit the changes.)

Commit Changes

If the changes were committed, a Successful message will then appear.

- Step 6
 - Navigate to the Online Designer. Review and confirm the variables moved to the appropriate instrument.

Project Setup Online Designer Data Dictionary

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

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

Survey options: Survey Queue Survey Login Survey Notifications

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

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
test	16			Choose action	Survey settings +Automated Invitations

REDCap – How to Move a Project to Production

Before moving a project from development mode into production mode, please ensure you have tested the project thoroughly. Once the project is in production mode, changes can still be made but must be submitted to a CTSI REDCap Administrator to be committed to the project. Please refer to the *REDCap - Making Changes while in Production* Guide for more information.

- Step 1
 - Navigate to the Project Setup tab for the project. The last checklist item is “Move your project to production status.” Click on ‘Move project to production.’
- Step 2

Move your project to production status

Not started

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](#)

- A pop-up notice will appear with the red box pre-checked to ‘Delete ALL data, calendar events, documents uploaded for records/responses, and (if applicable) survey responses’. If you have entered test data that needs to be deleted prior to moving to production, please leave this box checked. *Real data should not be entered while in development mode. If you have accidentally entered real data, then you should select ‘Keep All Data saved so far.’*
- Click on ‘Yes, Move to Production Status.’

Move Project To Production Status?

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?

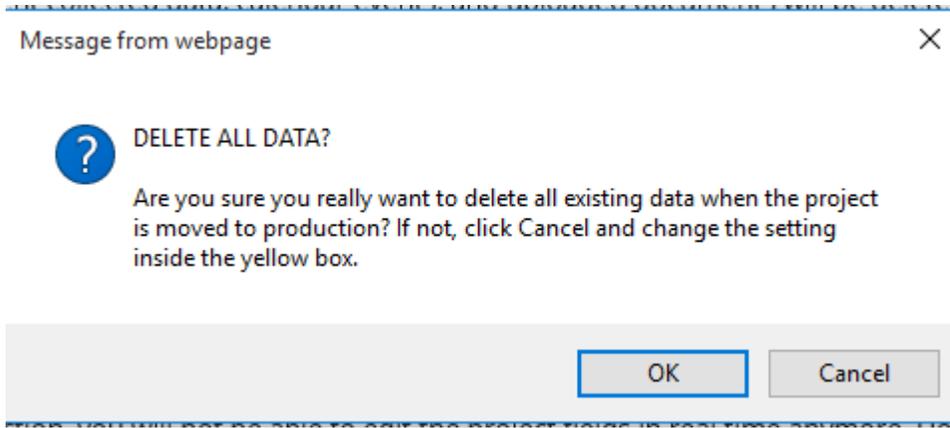
Keep ALL data saved so far.

Delete ALL data, calendar events, documents uploaded for records/responses, survey responses (if applicable), and any logging events pertaining to data collection.

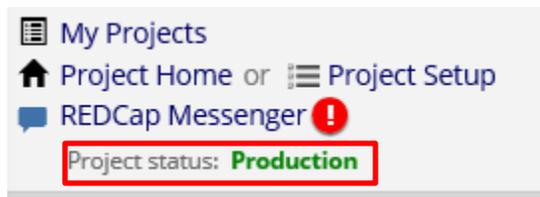
Once in production, you will not be able to edit the project fields in real time anymore. However, you can make edits in Draft Mode, which will be auto-approved or else might need to be approved by a REDCap administrator before taking effect.

[YES, Move to Production Status](#) [Cancel](#)

- Step 3
 - If you have selected to delete all the data, then another warning will appear.
 - After reviewing the box, make the appropriate selection.



- Step 4
 - The system will provide a notification that the project has been moved to Production status. You may confirm the status by referring to the top-left corner of the screen:



REDCap - Steps to move a record from one project to another project

For the process detailed below, the variable names and form names must be identical

Before beginning this process, confirm the record number being transferred does NOT already exist in the new project

Step 1

- Within the project containing the record currently, create a report for the specific record (to include all the fields to be transferred with the record). Add a filter to the report to only pull in the information for the record to be transferred. Once the report is created, click Save.

Data Exports, Reports, and Stats [VIDEO: How to use Data Exports, Reports, and Stats](#)

[+ Create New Report](#) [My Reports & Exports](#) [PDF & Other Export Options](#)

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.

Name of Report: Data Transfer of Record #7

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

Field	Field Name	Instrument	Action
Field 1	record_id "Login Identification"	Demographics	X
Field 2	name "Full Name"	Demographics	X
Field 3	email "email address"	Demographics	X
Field 4	dob "DOB"	Demographics	X
Field 5	candy "What kind of candy do you like?"	Demographics	X
Field 6	demographics_complete "Complete?"	Demographics	X
Field 7	date "Date"	Daily Diaries	X

STEP 3

Show data for all events for each record returned [?](#) [How to use filters and AND/OR logic](#)

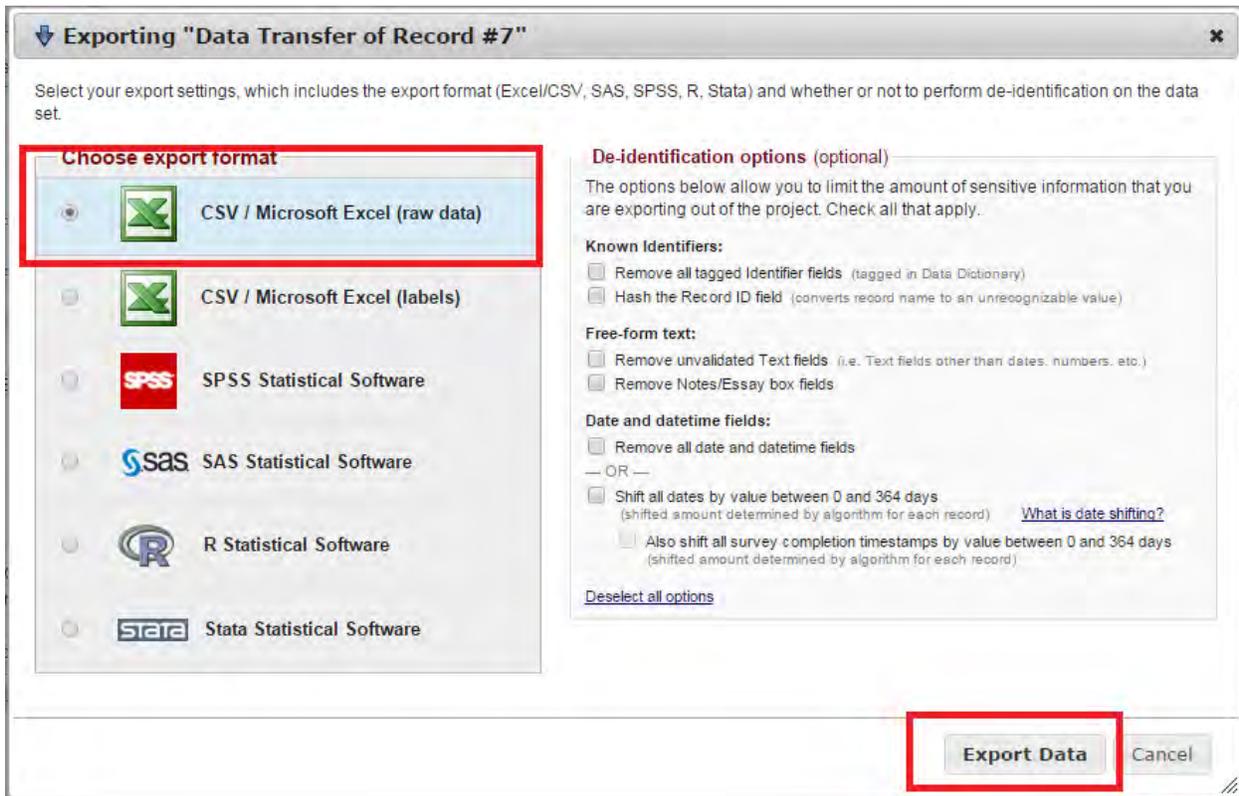
Filters (optional)

Filter	Field	Operator	Value	Action
Filter 1	record_id "Login Identification"	=	7	X
	in All events			
Filter 2	-- select a field --	=		
	in All events			

Switch format: [Use advanced logic](#)

Step 2

- Once the Report is saved, click on *Export* and download the report in raw format. Save the data to your computer.



Step 3

- Log into the project that the data will be transferred into. Click on the *Data Import Tool*. Please note the instructions.



Step 4

- If the project that the data is being transferred from has the same variable names and form names as the project the data is being transferred into, then click on *choose file* to upload the data you extracted in Step 2. Once the file is selected, click on *upload file*.

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

Format for date and datetime values:

Allow blank values to overwrite existing saved values?

Unload your CSV file:

No file chosen

Step 5

- You should receive a notice saying: ‘Your document was uploaded successfully and is ready for review.’ The Instructions for data review are noted on this REDCap screen. Review the import of data and confirm the import is to the correct variable names.

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
- Red box = error
- Orange box = warning

DATA DISPLAY TABLE

record_id	redcap_event_name	name	email	dob	candy	demographics_complete	date	sleep	leg	daily
7 (new record)	baseline_arm_1	Data Transfer Test Record 7	abc@342.com	8091945	5	2				
7 (new record)	12_day_prior_to_su_arm_1									
7 (new record)	2_week_post_surger_arm_1									

Do you wish to import the new data (displayed above) into the project?
(Click the button below to import the data.)

Step 6

- If the import is correct, click on *Import Data* to complete the process.

Do you wish to import the new data (displayed above) into the project?
 (Click the button below to import the data.)

If the import was successful, you will receive a successful notice.

 **Import Successful!** 3 records were created or modified during the import.

The data you uploaded from the file was successfully imported into the project. If you wish to import more data, you may use the box above to select another file on your computer.

Step 7

- Navigate to the Record Status Dashboard and locate the imported record. Verify the information was imported to the correct variable names and forms.

Data Collection

- Manage Survey Participants
- Scheduling
- 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

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
- Incomplete (no data saved)
- Unverified
- Complete
- ✔ Partial Survey Response
- ✔ Completed Survey Response

Displaying record: "1" through "mmh8541" of 14 records

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

Login Identification	Demographics Baseline	Treatment Survey Baseline	Treatment Survey 1-2 day prior to surgery	Daily Diaries 1	Daily Diaries 2	Daily Diaries 3	Daily Diaries 4	Treatment Survey 2 week post surgery
1 Mary Heart	●	●	●	●	●	●	●	●
2 Abc	●	●	●	●	●	●	●	●
3 Mary Moore	●	●	●	●	●	●	●	●
4	●	●	●	●	●	●	●	●
5 All In One	●	●	●	●	●	●	●	●
6 Data Transfer Test	●	●	●	●	●	●	●	●
7 Data Transfer Test Record 7	●	●	●	●	●	●	●	●

Contact REDCap@gwu.edu immediately if the information was imported incorrectly.

REDCap - How To Make a Survey Inactive

- Navigate to the Project Setup tab and then to the Online Designer.

Design your data collection instruments & enable your surveys

Not started

I'm done!

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 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](#)

- Click on Survey Settings next to the survey you would like to make inactive.

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Service Request	95			Choose action	Survey settings + Automated Invitations

- Click on the Survey Status – change to Survey “Offline.” This will prevent users from being able to access the survey. Click “Save Changes” at the bottom of the page to save this setting.

Project Home Project Setup Online Designer **Modify survey settings**

You may edit the survey's basic information by modifying the fields below and clicking the Save Changes button.

Modify survey settings for data collection instrument "Service Request" Cancel

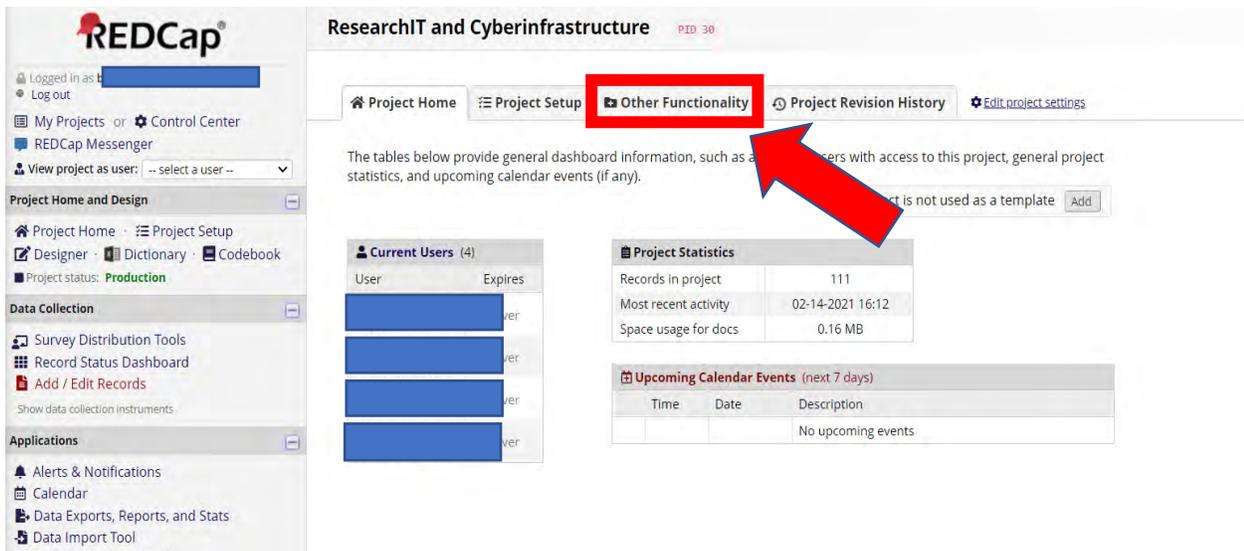
Survey Status Survey Offline

If offline, respondents will not be able take the survey.

Basic Survey Options:

REDCap: How to migrate project from CTSI to GWU

- Login to CTSI (or any REDCap system where the project you want to move is located).
- Choose the project you want to migrate/move from the project list.
- Once you are at the project home page, click “Other Functionality”



ResearchIT and Cyberinfrastructure PID 30

Project Home | Project Setup | **Other Functionality** | Project Revision History | Edit project settings

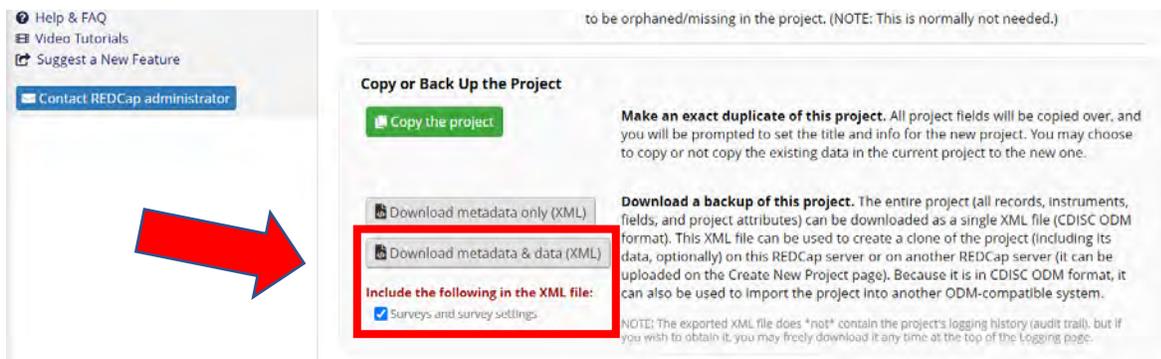
The tables below provide general dashboard information, such as a list of users with access to this project, general project statistics, and upcoming calendar events (if any).

User	Expires
[Redacted]	ver

Records in project	111
Most recent activity	02-14-2021 16:12
Space usage for docs	0.16 MB

Time	Date	Description
		No upcoming events

- On the “other functionality” page, scroll down to “Copy or Backup Project” section.



to be orphaned/missing in the project. (NOTE: This is normally not needed.)

Copy or Back Up the Project

[Copy the project](#)

[Download metadata only \(XML\)](#)

Download metadata & data (XML)

Include the following in the XML file:

- Surveys and survey settings

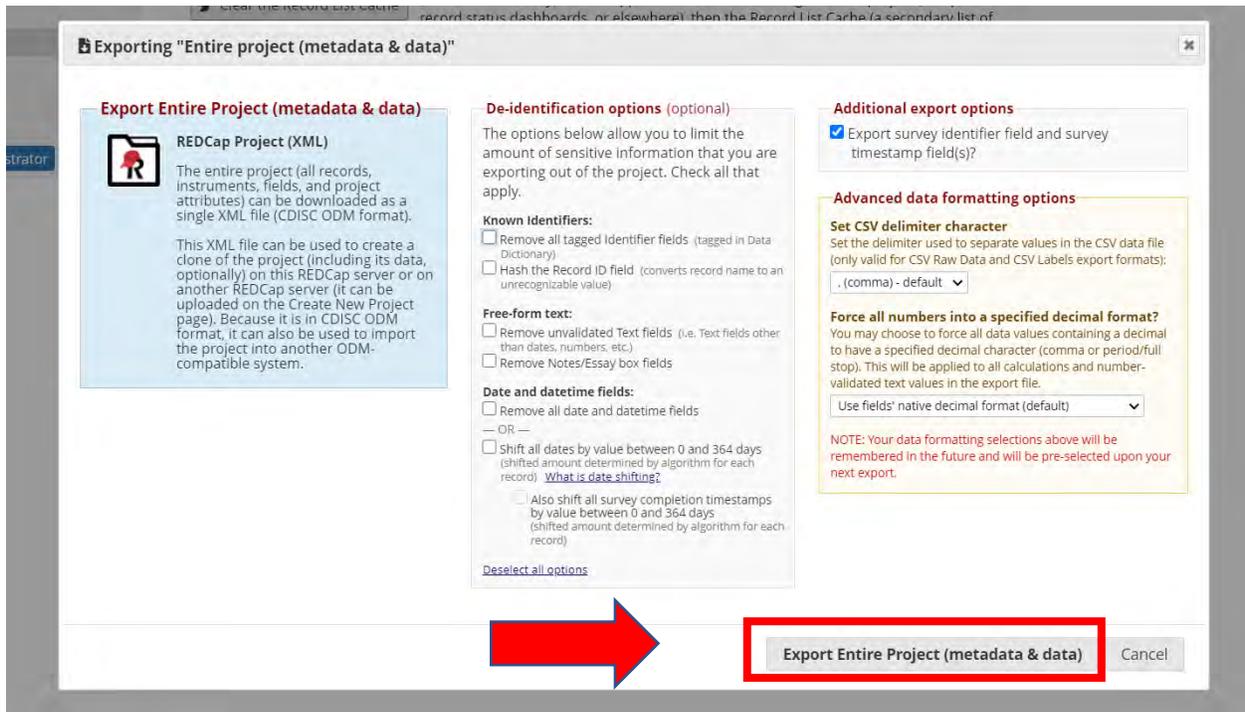
Make an exact duplicate of this project. All project fields will be copied over, and you will be prompted to set the title and info for the new project. You may choose to copy or not copy the existing data in the current project to the new one.

Download a backup of this project. The entire project (all records, instruments, fields, and project attributes) can be downloaded as a single XML file (CDISC ODM format). This XML file can be used to create a clone of the project (including its data, optionally) on this REDCap server or on another REDCap server (it can be uploaded on the Create New Project page). Because it is in CDISC ODM format, it can also be used to Import the project into another ODM-compatible system.

NOTE: The exported XML file does *not* contain the project's logging history (audit trail), but if you wish to obtain it, you may freely download it any time at the top of the Logging page.

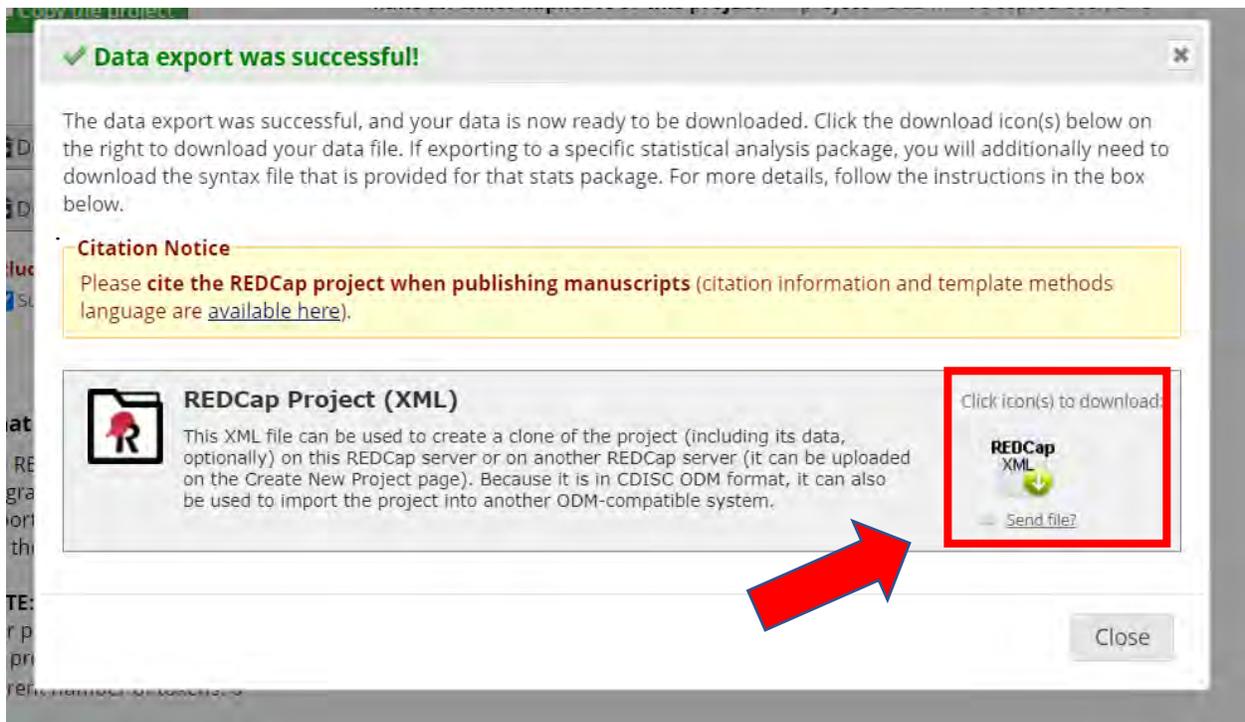
NOTE: There are many options here for exporting your project. We recommend selecting “Download metadata & data” and also selecting “Survey and survey settings” if your project has a survey(s).

- Once you select “Download metadata & data” this screen will appear.

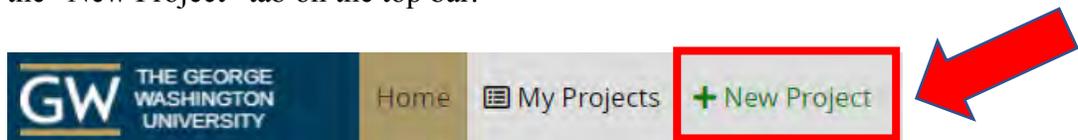


NOTE: There are many options for de-identification if you choose to use them.

- When everything looks acceptable, select “Export Entire Project (metadata & data)” in the bottom right



- This will be the next screen alerting that your file is ready for download. Select the icon to the right to download the file.
 - Keep this file in a safe place, we will need it again.
- Go and login to GWU REDCap (or the instance where you are moving the project)
- Click the “New Project” tab on the top bar.



- Once on the New Project page, select “Upload a REDCap Project XML File”
 - Then select the XML file we downloaded in the above steps.

+ Create a new REDCap Project

You may begin the creation of a new REDCap project on your own by completing the form below and clicking the Create Project button at the bottom.

Project title:
Title to be displayed on project webpage

Purpose of this project: How will it be used?

Project notes (optional): Comments describing the project's use or purpose that are displayed on the My Projects page.

Start project from scratch or begin with a template?

Create an empty project (blank slate)

Upload a REDCap project XML file (CDISC ODM format) 

Use a template (choose one below)

NOTE: You will have to re-enter the project title and purpose again before proceeding.

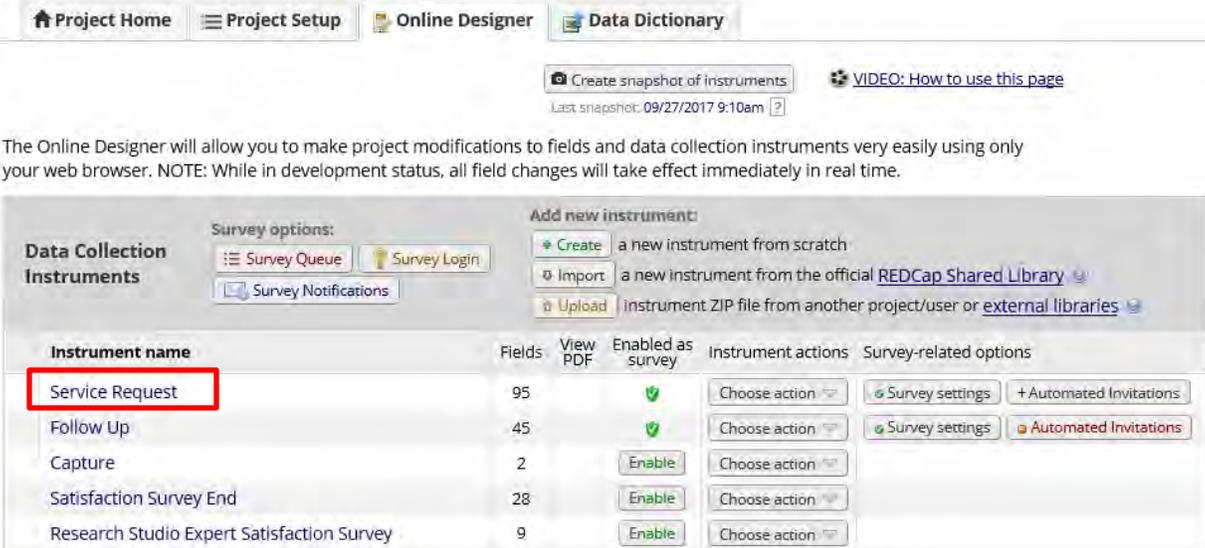
Your project should now be available in the new REDCap instance.

TIPS:

- Review your project to make sure everything migrated safely.
- If you used or use any external modules in the CTSI REDCap instance that you would also want available in the GWU instance, please reach out to an administrator at REDCap@gwu.edu.

REDCap – Obtain the Public Survey Link to a Survey

The Public Survey Link is **only to the first instrument/form** in the REDCap project. If you have multiple surveys that need a Public Link, you will have to create separate REDCap projects for each.

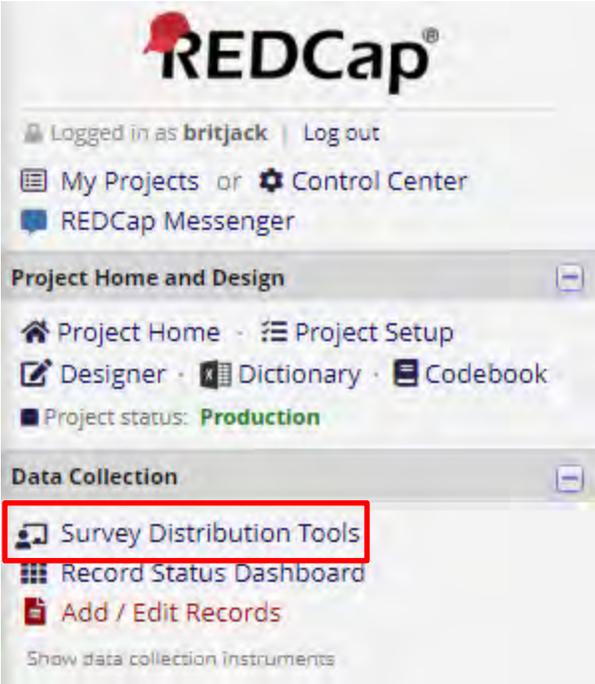


The screenshot shows the REDCap Online Designer interface. At the top, there are navigation tabs: Project Home, Project Setup, Online Designer, and Data Dictionary. Below these are buttons for 'Create snapshot of instruments' and a video link 'VIDEO: How to use this page'. A note states: 'The Online 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.'

The main content area is titled 'Data Collection Instruments' and includes 'Survey options' (Survey Queue, Survey Login, Survey Notifications) and 'Add new instrument' options (Create, Import, Upload). Below this is a table of instruments:

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Service Request	95		✓	Choose action	Survey settings, + Automated Invitations
Follow Up	45		✓	Choose action	Survey settings, Automated Invitations
Capture	2		Enable	Choose action	
Satisfaction Survey End	28		Enable	Choose action	
Research Studio Expert Satisfaction Survey	9		Enable	Choose action	

- Step 1
 - To obtain the public link to the first instrument/form/survey, click on 'Survey Distribution Tools.'



The screenshot shows the REDCap user interface. At the top, there is the REDCap logo and a user login bar: 'Logged in as britjack | Log out'. Below this are navigation links: 'My Projects or Control Center' and 'REDCap Messenger'. A section titled 'Project Home and Design' contains links for 'Project Home', 'Project Setup', 'Designer', 'Dictionary', and 'Codebook', along with 'Project status: Production'. A section titled 'Data Collection' contains the 'Survey Distribution Tools' link, which is highlighted with a red box, and other options like 'Record Status Dashboard' and 'Add / Edit Records'.

- Step 2
 - This will open the Public Survey Link tab.

- To obtain the general link to the survey, highlight and copy the link located in the Public Survey URL box. You can alternatively select “Send me URL via email” to have REDCap email you the public survey link.
- To open the survey, click on “Open Public Survey.” This will open the survey in a format in which the survey can be taken.

Survey Distribution Tools

 Public Survey Link

 Participant List

 Survey Invitation Log

Using a public survey link is the simplest and fastest way to collect responses for your survey. You may obtain the survey link below to email it to your participants. Responses will be collected anonymously (unless the survey contains questions asking for identifying data from the participant). **NOTE:** Since this method uses a single survey link for all participants, it allows for the possibility of participants taking the survey multiple times, which may be necessary in some cases.

To obtain the survey link, copy the URL below and paste it into the body of an email message in your own email client. Your email recipient(s) can then click the link to begin taking your survey.

Public Survey URL:

http://redcapint.wakehealth.edu/redcap_int/surveys/?s=ANLT...



Link Actions

 Open public survey

 Open public survey +  Log out

 Send me URL via email

 Survey Access Code or  QR Code

Link Customizations

 Get Short Survey Link

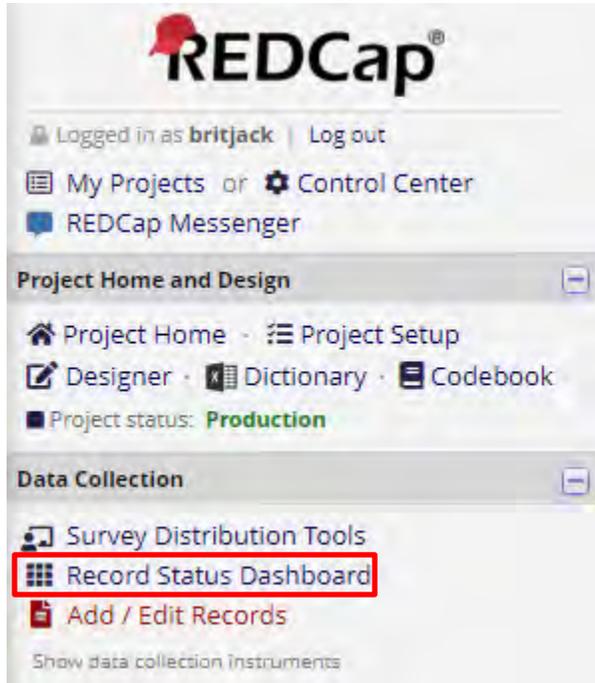
 Create Custom Survey Link

 Get Embed Code

REDCap – How to Open a Follow-Up Survey

Ensure the follow-up forms have been enabled as surveys. For assistance on enabling the survey functionality, please refer to the *How to enable the survey functionality* guide.

- Step 1
 - To open a follow-up survey for a participant, navigate to the Record Status Dashboard



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
- Incomplete (no data saved) ?
- Unverified
- Partial Survey Response
- Complete
- Completed Survey Response

Dashboard displayed: [Default dashboard] v

Displaying record Page 1 of 1: "1" through "5" v of 5 records

ALL (5) v records per page

[Create custom dashboard](#)

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

Record ID	Service Request	Follow Up	Capture	Satisfaction Survey End	Satisfaction Survey
1	●	○	○	○	○
2	●	●	○	○	○
3	●	○	○	○	○
4	●	○	○	○	○
5	●	○	○	○	○

- Step 2
 - Locate the Record for which the next survey needs to be completed.

- Click on the grey bubble under the appropriate Survey header.
- This will open the Data Entry Form for that record's survey.

Displaying: Instrument status

Record ID	Service Request	Follow Up
1		

Follow Up

Invitation status: Survey options

Editing existing Record ID 1

Record ID 1

Initial Follow-Up Email Sent
* must provide value Today

CTSI employee that initiated follow-up / triaged request
* must provide value

General Comments

Expand

Request Status
* must provide value Active

Form Status

Complete? Incomplete

Save & Exit Form Save & ...

-- Cancel --

- Step 3
 - Once in the Data Entry view, click on the “Survey Options” dropdown and then select “Open Survey.”
 - This will open the form in the Survey view where the participant may enter and submit their information.

Follow Up

Invitation status: !

Editing existing Record ID 1

Record ID 1

Initial Follow-Up Email Sent
* must provide value

CTSI employee that initiated follow-up / triaged request
* must provide value phenders

General Comments

Request Status
* must provide value Active

Form Status

Complete? Incomplete

Save & Exit Form Save & ...

Cancel

Survey options

Open survey

Log out + Open survey

Compose survey invitation

Survey Access Code and QR Code

Survey

Henderson, Tripp, Please complete the survey below.
Thank you!

Initial Follow-Up Email Sent
* must provide value

CTSI employee that initiated follow-up / triaged request
* must provide value [survey respondent]

General Comments

Request Status
* must provide value Active

Submit

REDCap – Piping

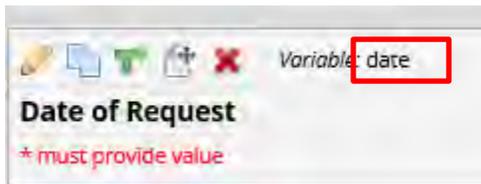
Piping allows a user to insert previously collected data into a form or survey within the same REDCap project.

Piping can be used to insert data **into** text in the following places:

- Field Label
- Field Note
- Section Header
- Matrix field column headers
- Option labels for multiple choice fields (radio, drop-down, checkbox)
- Slider field labels (i.e. text displayed above slider bar)
- Custom record locking text (if defined, displayed at bottom of form)
- Survey Instructions
- Survey Completion Text
- Survey invitation emails (sent via Participant List or Automated Invitations) - includes both subject and message
- Custom text displayed at top of Survey Queue
- Inside the URL for a survey's 'Redirect to a URL' setting

To pipe in previously collected data, insert the variable name in brackets where you want the collected data to appear.

For example, if the information you want to pipe in is a patient's date of birth, you will use the assigned variable name for that question within brackets:

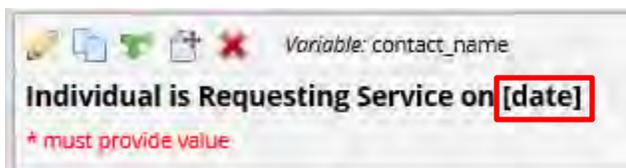


Variable: date

Date of Request

* must provide value

Collected Data Variable

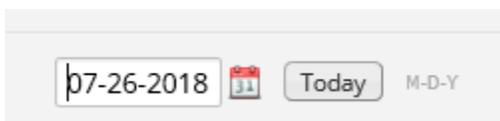


Variable: contact_name

Individual is Requesting Service on [date]

* must provide value

Variable inserted into a question



07-26-2018 Today M-D-Y

Response to question



Individual is Requesting Service on 07-26-2018

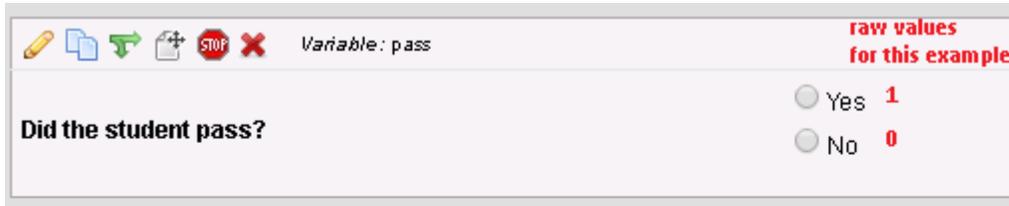
* must provide value

The response to the question is piped into another question

Data can be piped **into** the places from the bulleted list above **from** any types of fields.

If you are piping data **from** a multiple choice field (i.e. radio or dropdown), the response will appear as the text (label) value, not the raw data value.

In this example, we are piping in the data associated with the question, “Did the student pass?” (variable name=*pass*). The piped field will appear as:



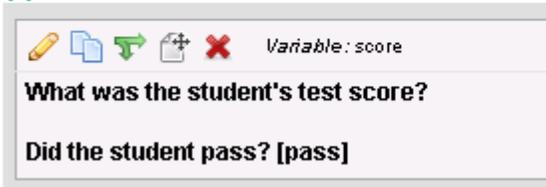
Variable: *pass* **raw values for this example**

Did the student pass?

Yes **1**

No **0**

The response associated with the [*pass*] variable is piped in as:

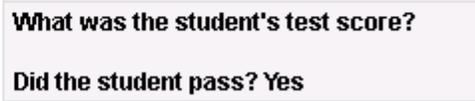


Variable: *score*

What was the student's test score?

Did the student pass? [*pass*]

The response of the piped in variable appears as:

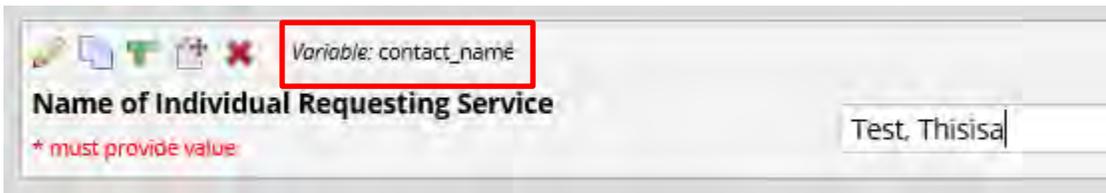


What was the student's test score?

Did the student pass? Yes

If you are piping data **from** a non-multiple choice field type (i.e. notes field or text field), the response will appear as the literal value.

In this example, we are piping in the data associated with the field, “Name of Individual Requesting Service” (variable name=*contact_name*). The data is being piped into the survey completion text:



Variable: *contact_name*

Name of Individual Requesting Service

* must provide value

Test, Thisisa



Survey Title: Survey

Survey Instructions: ([*contact_name*], Please complete the survey below. Thank you!)

Survey

Test, Thisisa, Please complete the survey below.
Thank you!

To cross-event pipe in longitudinal projects, include the event name in brackets before the variable name in brackets. The event name is located on the ‘Define My Events’ page.

For example, "What is your name?" is included in Event 1, but you are working in a form within another Event. The piping should appear as: `[event_1_arm_1][name]`

[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 (optional)	Unique event name (auto-generated)
1	Event 1		event_1_arm_1
2	Event 2		event_2_arm_1

[Add new event](#)

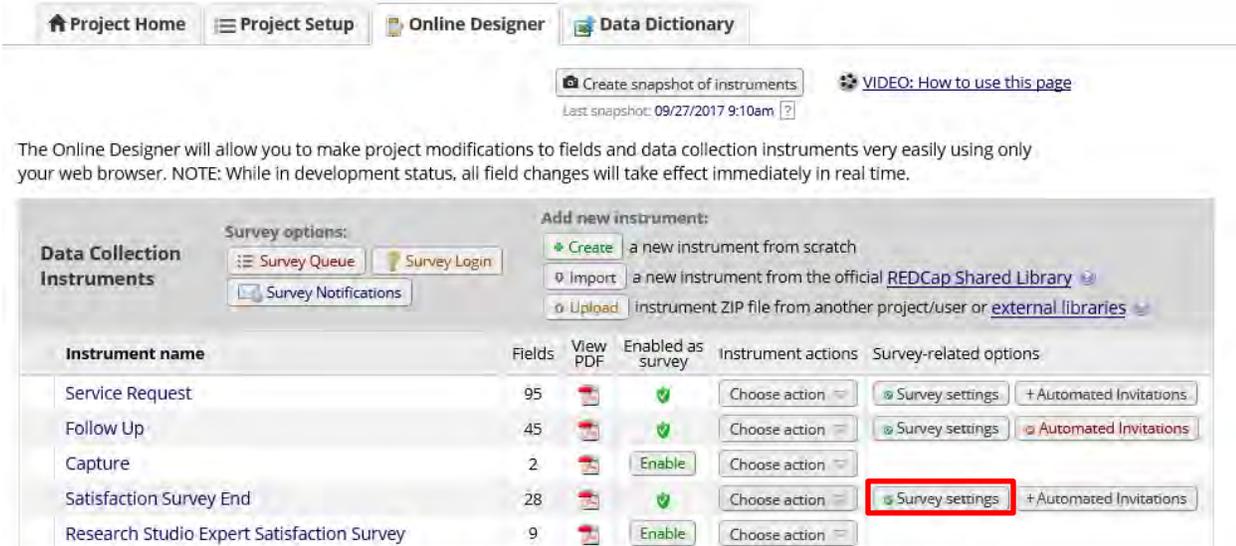
Descriptive name for this event

Custom Event Label (optional)
Example: [visit_date], [weight] kg

REDCap – How to remove the Survey functionality and return the instrument back to basic data entry

To remove the survey functionality, complete the following steps:

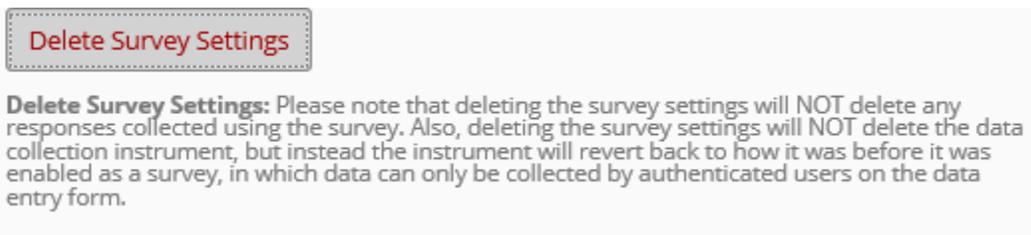
- Navigate to the Online Designer tab. Click on “Survey Settings” next to the instrument that you no longer want to be a survey.



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.

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Service Request	95			Choose action	Survey settings + Automated Invitations
Follow Up	45			Choose action	Survey settings Automated Invitations
Capture	2		Enable	Choose action	
Satisfaction Survey End	28			Choose action	Survey settings + Automated Invitations
Research Studio Expert Satisfaction Survey	9		Enable	Choose action	

- This will open the Modify Survey Settings page. Navigate to the bottom of the page and locate the “Delete Survey Settings” button. Notice the disclaimer underneath the button.



Delete Survey Settings

Delete Survey Settings: Please note that deleting the survey settings will NOT delete any responses collected using the survey. Also, deleting the survey settings will NOT delete the data collection instrument, but instead the instrument will revert back to how it was before it was enabled as a survey, in which data can only be collected by authenticated users on the data entry form.

- Click on the “Delete Survey Settings” button. A second disclaimer will appear. If you are certain you want to remove the survey functionality, click on Delete Survey.
- Note: This will not delete the instrument. It will only remove the survey functionality.

Delete this instrument's survey settings? ✕

Please note that deleting the survey settings will NOT delete any responses collected using the survey. Also, deleting the survey settings will NOT delete the data collection instrument, but instead the instrument will revert back to how it was before it was enabled as a survey, in which data can only be collected by authenticated users on the data entry form.

NOTICE: If this survey is deleted, all participants will be removed from your Participant Lists associated with this survey, and all survey links and return codes will cease to function for this survey. Any email invitations that have been scheduled to be sent for this survey will be deleted. Additionally, all survey responses will have their 'survey completion' timestamp removed, as seen in a data export file or on the data entry form. If you choose to delete the survey, you may enable the data collection instrument as a survey again, but you will still lose all the survey-related information mentioned thus far.

- The user will receive a successful deletion notice.

Survey successfully deleted! ✕

The survey has been successfully deleted. You will now be redirected back to the Online Designer.

- Once the user clicks on “Close,” the system will return the user to the Online Designer tab. Notice the survey functionality is no longer enabled.

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

[VIDEO: How to use this page](#)
Last snapshot: 09/27/2017 9:10am

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

Survey options:

Add new instrument:

- a new instrument from scratch
- a new instrument from the official [REDCap Shared Library](#)
- instrument ZIP file from another project/user or [external libraries](#)

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Service Request	95			Choose action	<input type="button" value="Survey settings"/> <input type="button" value="+ Automated Invitations"/>
Follow Up	45			Choose action	<input type="button" value="Survey settings"/> <input type="button" value="Automated Invitations"/>
Capture	2		<input type="button" value="Enable"/>	Choose action	
Satisfaction Survey End	28		<input type="button" value="Enable"/>	Choose action	<input type="button" value="Survey settings"/>
Research Studio Expert Satisfaction Survey	9		<input type="button" value="Enable"/>	Choose action	

REDCap – Repeating Events

- Before enabling the repeating event functionality, first build all of your forms in either the Online Designer or Data Dictionary and then create your events and designate your forms to your events.
- Once all forms have been built and designated to the appropriate events, navigate to the Project Setup page. Under “Enable optional modules and customizations,” select the Enable button next to “Repeatable instruments and events.”



- A window will pop up where you will select the event(s) that you want to repeat. You also have the option of repeating instruments within the events. Finally, if you are repeating instruments, you can pipe in field(s) from that instrument to create a custom label for each repeat instance on the Record Home Page (not shown in the screenshot below). When finished, select “Save.”

Repeatable instruments and events ✕

An excellent way to collect repeating data in REDCap is to use repeatable instruments and/or repeatable events. This is sometimes called one-to-many data collection. Some examples may include but are not limited to the following: data from multiple visits or observations, concomitant medications, adverse events, or repetitive surveys (daily, weekly, etc.).

Below you can specify a data collection instrument or a whole event of instruments to be infinitely repeatable, in which each repeating instrument or event can be repeated a different number of times for each record. You may set any event in the project to be repeatable *or* alternatively set selected instruments to be repeatable within an event. **The 'Repeat Entire Event' option means that all the event's instruments will repeat together and stay connected, whereas the 'Repeat Instruments' option implies that the instruments will repeat separately and independently from each other on that event.** Once an instrument or event is set to repeat, you will see options on the Record Home Page to add another instance of the instrument/event for the currently selected record.

Event Name	Repeat entire event or selected instruments?	Instrument name (select instruments to repeat)	Custom label for repeating instruments (optional) ⓘ Example: [visit_date], [weight] kg
Screening Visit	-- not repeating --	<input type="checkbox"/> Baseline Questionnaire <input type="checkbox"/> Vitals	<input type="text"/> <input type="text"/>
✓ Follow-Up Visit	Repeat Entire Event (repeat	<input checked="" type="checkbox"/> Vitals <input checked="" type="checkbox"/> Follow-Up Form	<input type="text" value="W"/> <input type="text" value="W"/>
Final Visit	-- not repeating --	<input type="checkbox"/> Vitals <input type="checkbox"/> Close-Out Form	<input type="text"/> <input type="text"/>

- You have now successfully enabled the repeating event functionality. The Record Home Page will display the repeating events as shown in the table on the next page.

Record Home Page

The grid below displays the form-by-form progress of data entered for the currently selected record. You may click on the colored status icons to access that form/event. If you wish, you may modify the events below by navigating to the [Define My Events](#) page.

[Choose action for record](#)

Legend for status icons:

- Incomplete
- Incomplete (no data saved)
- Unverified
- Complete
- Many statuses (all same)
- Many statuses (mixed)

Record ID 1 successfully edited

Record ID 1

Data Collection Instrument	Screening Visit	Follow-Up Visit			Final Visit
		(#1)	(#2)	(#3)	
Baseline Questionnaire					
Vitals					
Follow-Up Form					
Close-Out Form					

- In order to add a new instance of your repeating event, you can click the “Add new” button above the final instance (in this example, #3).

REDCap – Repeating Instruments

- Before enabling the repeating instrument functionality, first build all of your forms in either the Online Designer or Data Dictionary.
- Once all forms have been built, navigate to the Project Setup page. Under “Enable optional modules and customizations,” select the Enable button next to “Repeatable instruments.”

Enable optional modules and customizations

Optional

I'm done!

Enable Repeatable instruments ?

Disable Auto-numbering for records ?

Enable Scheduling module (longitudinal only) ?

Enable Randomization module ?

Enable Designate an email field to use for invitations to survey participants ?

Additional customizations

- A window will pop up where you will select the instrument(s) that you want to repeat. You also have the option of piping in field(s) from that instrument to create a custom label for each repeat instance on the Record Home Page. When finished, select “Save.”

Repeatable instruments

An excellent way to collect repeating data in REDCap is to use repeatable instruments and/or repeatable events. This is sometimes called one-to-many data collection. Some examples may include but are not limited to the following: data from multiple visits or observations, concomitant medications, adverse events, or repetitive surveys (daily, weekly, etc.).

Below you can specify a data collection instrument to be infinitely repeatable, which means that an instrument can be repeated over and over again (a different number of times for each record) even without enabling REDCap's longitudinal module. Once an instrument is set to repeat, you will see options on the Record Home Page to add another instance of the instrument for the currently selected record. All instances of a repeating instrument will then be displayed as a table near the bottom of the Record Home Page, thus allowing viewing of the instances and easy navigation within them.

Repeat this instrument?	Instrument name	Custom label for repeating instruments (optional) ⓘ Example: [visit_date], [weight] kg
<input type="checkbox"/>	Baseline Questionnaire	
<input type="checkbox"/>	Visit 1	
<input type="checkbox"/>	Visit 2	
<input checked="" type="checkbox"/>	Medications	[medname]

Save Cancel

- You have now successfully enabled the repeating instrument functionality. The Record Home Page will display the repeating instrument(s) below the main instrument list with the custom label (in this example it is the medication name).

Record Home Page

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

 Choose action for record 

Legend for status icons:

 Incomplete  Incomplete (no data saved) 
 Unverified    Many statuses (all same)
 Complete    Many statuses (mixed)

 Record ID 1 successfully edited

Record ID 1

Data Collection Instrument	Status
Baseline Questionnaire	
Visit 1	
Visit 2	
Medications	   

Repeating Instruments

Medications		
1		Advil
2		Zyrtec
3		Zoloft
 Add new		

- In order to add a new instance of your repeating instrument, you can click the (+) icon next to the stacked bubbles in the first table or click the “Add new” button below the list of repeating instruments in the second table.

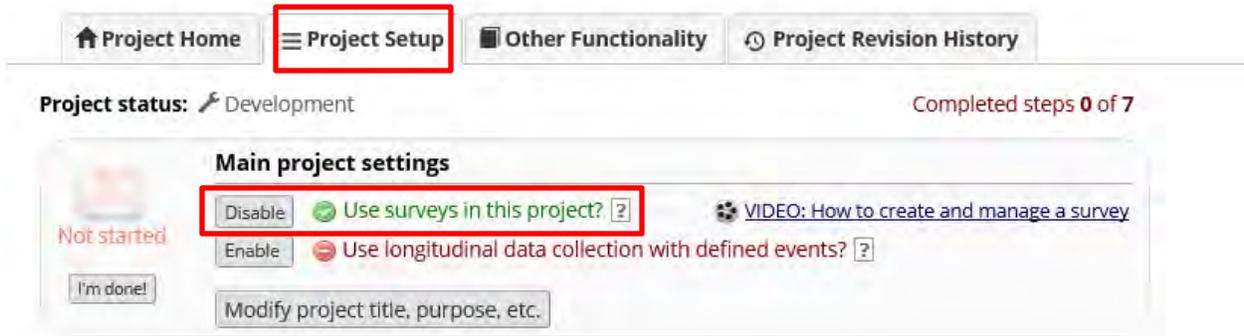
REDCap – Survey Participant List

If responses do not need to be anonymous, you may use the participant list to capture email addresses to send participants multiple surveys and have the data linked. Below are three (3) options.

Option 1: The project's first instrument is a survey and you want to use the public URL to capture email addresses for follow-up surveys

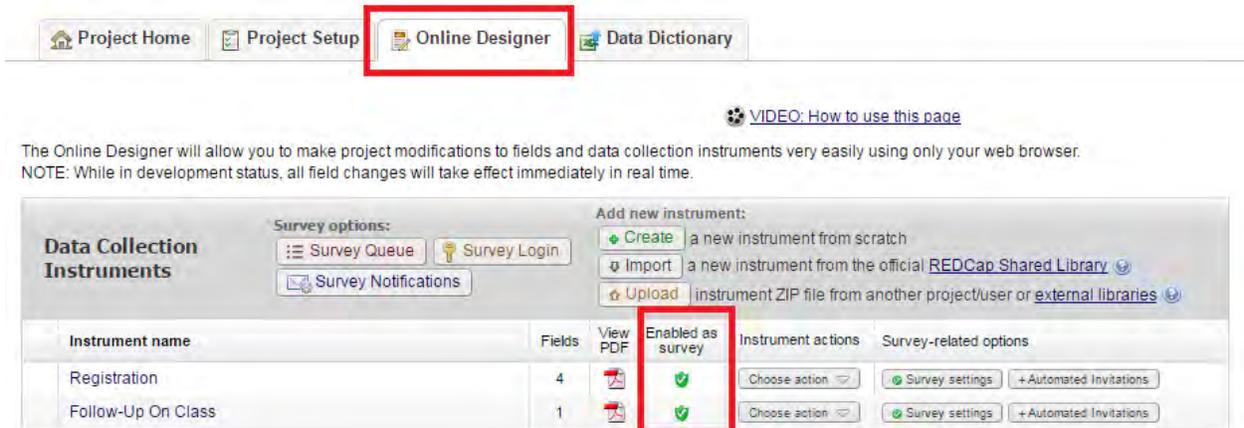
Step 1: Ensure the survey functionality is enabled:

#1) On the Project Setup tab



The screenshot shows the 'Project Setup' tab in REDCap. The 'Project status' is 'Development' and 'Completed steps 0 of 7'. Under 'Main project settings', the 'Use surveys in this project?' checkbox is checked and highlighted with a red box. Other options include 'Use longitudinal data collection with defined events?' (unchecked), 'I'm done!', and 'Modify project title, purpose, etc.'. A video link 'VIDEO: How to create and manage a survey' is also visible.

#2) Each individual form that will be a survey is also enabled on the Online Designer tab



The screenshot shows the 'Online Designer' tab in REDCap. The 'Data Collection Instruments' section is visible. The 'Enabled as survey' checkbox for the 'Registration' instrument is checked and highlighted with a red box. The 'Follow-Up On Class' instrument is also checked. The table below shows the details of the instruments.

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Registration	4		<input checked="" type="checkbox"/>	Choose action	Survey settings + Automated Invitations
Follow-Up On Class	1		<input checked="" type="checkbox"/>	Choose action	Survey settings + Automated Invitations

Step 2: If you want to use the public URL to capture email addresses of participants in order for subsequent surveys to be sent to the same participants, then create a field on the initial survey for email addresses. Ensure the validation for that field is set for 'Email.'

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: Text Box (Short Text, Number, Date/Time, ...)

Field Label: Email address

Field Annotation (optional): [Learn about Action Tags](#)

Variable Name (utilized during data export): email

Validation? (optional): **Email**

Required?* No

Identifier? No

Custom Alignment

Field Note (optional)

Step 3: Navigate to the Project Setup tab and locate the 'Enable optional modules and Customizations' bubble. Click Enable for the 'Designate an email field to use for invitations to survey participants.'

Project Home **Project Setup** Other Functionality Project Revision History

Project status: Development Completed steps 0 of 7

Main project settings

Not started VIDEO: How to create and manage a survey

Disable Use surveys in this project? ?

Enable Use longitudinal data collection with defined events? ?

I'm done!

Design your data collection instruments & enable your surveys

Not started

I'm done! 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 or Explore the

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

Learn how to use

Enable optional modules and customizations

Optional

I'm done!

Enable Repeatable instruments ?

Disable Auto-numbering for records ?

Enable Scheduling module (longitudinal only) ?

Enable Randomization module ?

Enable Designate an email field for sending survey invitations ?

Enable Twilio SMS and Voice Call services for surveys ?

The 'Enable' button will open a pop-up box where you will select the variable named used for the 'Email' field.

Designate an email field for sending survey invitations

Choose an email field to use for invitations to survey participants:

-- select a field --

You can capture email addresses for sending invitations to your survey participants by designating a field in your project. If a field is designated for that purpose, then any records in your project that have an email address captured for that particular field will have that email address show up as the participant's email address in the Participant List (unless an email address has already been entered for that participant in the Participant List directly).

Using the designated email address field can be especially valuable when your first data collection instrument is not enabled as a survey while one or more other instruments have been enabled as surveys. Since email addresses can only be entered into the Participant List directly for the first data collection instrument, the designated email field provides another opportunity to capture the email address of survey participants.

Please be aware that designating an email field means that survey responses can NEVER BE ANONYMOUS because of the fact that the participant's email address can be viewed on a data entry form, which means it is easy to identify the record/response to which the email address belongs.

NOTE: If the participant's email address has already been captured directly in the Participant List, then that email address will supersede the value of the email field here when survey invitations are sent to the participant. Also, if the email invitation field exists on multiple longitudinal events, on a repeating instrument, or on a repeating event, the field's value will be synchronized across all instances/events so that changing it in one location will change the value across all events/instances where the field appears.

Survey-specific email invitation field: While the email invitation field discussed here is a project-level setting, it is helpful to know that there also exists a survey-level email invitation field option that can be utilized for particular surveys in the project (whereas the project-level field would be applied to ALL surveys). A survey-specific email invitation field can be enabled for any given survey, in which you can designate any email field in your project to use for sending survey invitations for that particular survey. Thus, you can collect several email addresses (e.g., for a student, a parent, and a teacher) and utilize each email for a different survey in the project. Then you can send each person an invitation to their own survey, after which all the survey responses get stored as one single record in the project. See the 'Survey Settings' page in the Online Designer for this survey-level setting.

Save

Cancel

Step 4: As participants complete the initial survey and provide their email address, the Participant List will begin to fill with the email addresses. Notice that the individuals Record ID number will appear beside their name.

Manage Survey Participants

Public Survey Link Participant List Survey Invitation Log

The Participant List option allows you to **send a customized email** to anyone in your list and **track who responds to your survey**. It is also possible to identify an individual's survey answers, if desired, by providing an Identifier for each participant (this feature must first be enabled by clicking the 'Enable' button in the table below). Note: All survey responses collected are considered anonymous unless you 1) are using Participant Identifiers or 2) have enabled the designated email field for invitations. [More details](#)

Participant List belonging to: [Initial survey] "Service Request"

Remove all participants

Displaying 1 - 5 of 5

Add participants Compose Survey Invitations Export list

Email	Record	Participant Identifier (optional)	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
a@wakehealth.edu	5	Disable		-			
1) mharbour@wakehealth.edu	2			-			
2) mharbour@wakehealth.edu	3			-			
3) mharbour@wakehealth.edu	4			-			
phenders@wakehealth.edu	1			-			

Step 5: To send the individuals the follow-up survey, navigate to the Participant List and select the 'Participant List belonging to' from the drop down then click on 'Compose Survey Invitations.'

Manage Survey Participants

Public Survey Link **Participant List** Survey Invitation Log

The Participant List option allows you to **send a customized email** to anyone in your list and **track who responds to your survey**. It is also possible to identify an individual's survey answers, if desired, by providing an Identifier for each participant (this feature must first be enabled by clicking the 'Enable' button in the table below). Note: All survey responses collected are considered anonymous unless you 1) are using Participant Identifiers or 2) have enabled the designated email field for invitations. [More details](#)

Participant List belonging to: [Initial survey] "Service Request" [Remove all participants]

Displaying 1 - 5 of 5 [Add participants] **Compose Survey Invitations** [Export list]

Email	Record	Participant Identifier (optional)	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
a@wakehealth.edu	5	<input type="checkbox"/> Disable	<input type="checkbox"/>	-	<input type="checkbox"/>		
1) mharbour@wakehealth.edu	2		<input checked="" type="checkbox"/>	-	<input type="checkbox"/>	-	-
2) mharbour@wakehealth.edu	3		<input checked="" type="checkbox"/>	-	<input type="checkbox"/>	-	-
3) mharbour@wakehealth.edu	4		<input checked="" type="checkbox"/>	-	<input type="checkbox"/>	-	-
phenders@wakehealth.edu	1		<input type="checkbox"/>	-	<input type="checkbox"/>		

Complete the information and then click 'Send Invitations.'

Note: When using the Participant List to email survey links, the link is specific to the participant. Please encourage the participants **not** to forward their emails with the link to other participants.

Only the names of individuals who completed the prior survey will be in this list. The system will pre-check the names of the individuals. If you decide against sending a follow-up survey to an individual, you can uncheck their name manually.

Option 2: A project's first instrument is a survey and you want to use the participant list

This option is available when you have a list of participant emails and you want to send them a link to the survey within REDCap. Using this option, you can choose to keep the survey(s) anonymous.

Step 1: The first form must be enabled as a survey. Refer to [Option 1, Step 1](#) above to ensure the forms have been enabled as surveys.

Step 2: Navigate to *Manage Survey Participants* and then the *Participant List* tab. Click on 'Add Participants' to begin building the participant list.

Manage Survey Participants

Public Survey Link **Participant List** Survey Invitation Log

The Participant List option allows you to **send a customized email** to anyone in your list and **track who responds to your survey**. It is also possible to identify an individual's survey answers, if desired, by providing an Identifier for each participant (this feature must first be enabled by clicking the 'Enable' button in the table below). Note: All survey responses collected are considered anonymous unless you 1) are using Participant Identifiers or 2) have enabled the designated email field for invitations. [More details](#)

Email	Record	Participant Identifier (optional)	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
a@wakehealth.edu	5			-			
1) mharbour@wakehealth.edu	2		✓	-			
2) mharbour@wakehealth.edu	3		✓	-			
3) mharbour@wakehealth.edu	4		✓	-			
phenders@wakehealth.edu	1			-			

Step 3: Enter the email addresses, one per line.

Note: If you want to enable the Participant Identifier option, click on 'enable' before entering the email addresses. As you are entering emails, you can add an identifier behind the email address using a comma as the separator. For example, **REDCap@gwu.edu, REDCap Admin**. **If you do not enable the Participant Identifier, the survey(s) will be anonymous.**

Add Emails to Participant List

Copy and paste your list of participant email addresses, **one per line**. If you are importing Identifiers for any participant, separate them by commas following the guidelines below.

```
ctsiredcap@wakehealth.edu  
test@test.com
```

Each participant starting on a new line

Field Order: Email, Participant Identifier (optional)

Example #1: john.williams@hotmail.com
Example #2: jimtaylor@yahoo.com, Jim Taylor
Example #3: putnamtr@gmail.com, ID 4930-72

Add participants Cancel

The names will then appear in the Participant List chart.

Step 4: Click on 'Compose Survey Invitations.' This will open a pop-up box where you can complete the invitation information.

Note: When using the Participant List to email survey links, the link is specific to the participant. Please encourage the participants **not** to forward their emails with the link to other participants.

Send a Survey Invitation to Participants

Info
Survey title: Service Request

When should the emails be sent?
 Immediately
 At specified time: [Time Picker] (Every 1, 1)

The time must be for the time zone America/New_York, in which the current time is 07/23/2018 09:32.

Enable reminders
 Re-send invitation as a reminder if participant has not responded by a specified time?

Compose message
From: phenders@wakehealth.edu
To: [All participants selected from Participant List]
Subject: [Text Box]

Compose | Preview | Send test email

Please take this survey.

You may open the survey in your web browser by clicking the link below:
[survey-link]

If the link above does not work, try copying the link below into your web browser:

NOTE: You may modify or remove any text you wish in the Compose Message text box above. Make sure you include either [survey-link] or [survey-ur] in the text or else the participant will not have a way to take the survey.

You may use HTML formatting in the email message: bold, <u> underline, <i> italics, link, etc.

[How to use Piping in the survey invitation](#)

Participant List (those who have not responded completely) Actions: -- check/uncheck participants --

<input checked="" type="checkbox"/>	Email (2 selected)	Participant Identifier	Scheduled?	Sent?	Respond
<input checked="" type="checkbox"/>	a@wakehealth.edu	(ID 5)	-	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	phenders@wakehealth.edu	(ID 1)	-	<input type="checkbox"/>	<input type="checkbox"/>

Send Invitations | Cancel

If a period of time has passed and participants have not completed the survey, you can use the 'Compose Survey Invitations' button to re-send the request.

Step 5: To send the individuals the follow-up survey, navigate to the Participant List and select the 'Participant List belonging to' from the drop down then click on 'Compose Survey Invitations.'

Manage Survey Participants

Public Survey Link **Participant List** Survey Invitation Log

The Participant List option allows you to **send a customized email** to anyone in your list and **track who responds to your survey**. It is also possible to identify an individual's survey answers, if desired, by providing an identifier for each participant (this feature must first be enabled by clicking the 'Enable' button in the table below). Unless an Identifier is used, all survey responses collected are considered anonymous. [More details](#)

Participant List belonging to [Initial survey] "Registration" Remove all participants

Displaying 1 - 3 of 3 Add participants **Compose Survey Invitations** Export list

Email	Participant Identifier	<input type="button" value="Enable"/>	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
mahankin@wakehealth.edu (ID 1)			<input checked="" type="checkbox"/>	-	<input type="checkbox"/>	-	-
mharbour@wakehealth.edu (ID 2)			<input checked="" type="checkbox"/>	-	<input type="checkbox"/>	-	-
mpah_wolfpack@yahoo.com (ID 3)			<input checked="" type="checkbox"/>	-	<input type="checkbox"/>	-	-

Complete the information and then click 'Send Invitations.'

NOTE: Only the names of individuals who completed the prior survey will be in this list. The system will pre-check the names of the individuals. If you decide against sending a follow-up survey to an individual, you can uncheck their name manually.

Send a Survey Invitation to Participants

Info
Survey title: Service Request

When should the emails be sent?
 Immediately
 At specified time: (YYYYMM)
The time must be for the time zone America/New_York, in which the current time is 07/23/2018 09:32

Enable reminders
 Re-send invitation as a reminder if participant has not responded by a specified time?

Compose message
From: phenders@wakehealth.edu
To: [All participants selected from Participant List]
Subject:

Please take this survey.

You may open the survey in your web browser by clicking the link below:
[survey-link]

If the link above does not work, try copying the link below into your web browser:

NOTE: You may modify or remove any text you wish in the Compose Message text box above. Make sure you include either [survey-link] or [survey-url] in the text or else the participant will not have a way to take the survey.

You may use HTML formatting in the email message: bold, <u> underline, <i> italics, link, etc.

[How to use Piping in the survey invitation](#)

Participant List (those who have not responded completely) **Actions:** -- check/uncheck participants --

<input checked="" type="checkbox"/>	Email (2 selected)	Participant Identifier	Scheduled?	Sent?	Respond
<input checked="" type="checkbox"/>	a@wakehealth.edu (ID 5)		-	<input type="checkbox"/>	<input type="button" value="Respond"/>
<input checked="" type="checkbox"/>	phenders@wakehealth.edu (ID 1)		-	<input type="checkbox"/>	<input type="button" value="Respond"/>

If you want to send the follow-up survey to participants even though they did not complete the initial survey, then you will need to create a separate REDCap project.

Option 3: The project's first instrument is a Data Entry form, but you want to use the participant list to send a survey that is an additional form

If you know the participant email addresses and want the participants to complete a survey at some point within the project, then you can complete the following steps to upload the email addresses to the Participant List for a future survey within the project.

Step 1: Ensure the forms to be used as surveys have been enabled. Refer to [Option 1, Step 1](#) above to ensure the appropriate forms have been enabled as surveys.

Step 2: Create a field on the data collection form for email addresses. Ensure the validation for that field is set for 'Email.'

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: Text Box (Short Text, Number, Date/Time, ...)

Field Label: Email address [How to use Piping](#)

Field Annotation (optional) [Learn about Action Tags](#)
Explanatory notes - not displayed on any page: ?

Variable Name (utilized during data export): email Enable auto naming of variable based upon its Field Label?
ONLY letters, numbers, and underscores

Validation? (optional): **Email**

Enable searching with: -- choose ontology to

Required?* No Yes
* Prompt if field is blank

Identifier? No Yes
Does the field contain identifying information?

Custom Alignment: Integer, Letters only, Number, Number (1 decimal place), Number (2 decimal places), Number (3 decimal places), Number (4 decimal places), Phone (North America), Social Security Number (U.S.)

Field Note (optional): Small reminder text displayed

Step 3: Navigate to the Project Setup tab and locate the 'Enable optional modules and Customizations' bubble. Click Enable for the 'Designate an email field to use for invitations to survey participants.'

Project Home **Project Setup** Other Functionality Project Revision History

Project status: Development Completed steps 0 of 7

Main project settings

Not started

I'm done!

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

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

Modify project title, purpose, etc.

Design your data collection instruments & enable your surveys

Not started

I'm done!

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 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](#)

Enable optional modules and customizations

Optional

I'm done!

Enable Repeatable instruments [?](#)

Disable Auto-numbering for records [?](#)

Enable Scheduling module (longitudinal only) [?](#)

Enable Randomization module [?](#)

Enable Designate an email field for sending survey invitations [?](#)

Enable Twilio SMS and Voice Call services for surveys [?](#)

Additional customizations

The 'Enable' button will open a pop-up box where you will select the variable named used for the 'Email' field.

Designate an email field for sending survey invitations
✕

Choose an email field to use for invitations to survey participants:

— select a field —

You can capture email addresses for sending invitations to your survey participants by designating a field in your project. If a field is designated for that purpose, then any records in your project that have an email address captured for that particular field will have that email address show up as the participant's email address in the Participant List (unless an email address has already been entered for that participant in the Participant List directly).

Using the designated email address field can be especially valuable when your first data collection instrument is not enabled as a survey while one or more other instruments have been enabled as surveys. Since email addresses can only be entered into the Participant List directly for the first data collection instrument, the designated email field provides another opportunity to capture the email address of survey participants.

Please be aware that designating an email field means that survey responses can NEVER BE ANONYMOUS because of the fact that the participant's email address can be viewed on a data entry form, which means it is easy to identify the record/response to which the email address belongs.

NOTE: If the participant's email address has already been captured directly in the Participant List, then that email address will supersede the value of the email field here when survey invitations are sent to the participant. Also, if the email invitation field exists on multiple longitudinal events, on a repeating instrument, or on a repeating event, the field's value will be synchronized across all instances/events so that changing it in one location will change the value across all events/instances where the field appears.

Survey-specific email invitation field: While the email invitation field discussed here is a project-level setting, it is helpful to know that there also exists a survey-level email invitation field option that can be utilized for particular surveys in the project (whereas the project-level field would be applied to ALL surveys). A survey-specific email invitation field can be enabled for any given survey, in which you can designate any email field in your project to use for sending survey invitations for that particular survey. Thus, you can collect several email addresses (e.g., for a student, a parent, and a teacher) and utilize each email for a different survey in the project. Then you can send each person an invitation to their own survey, after which all the survey responses get stored as one single record in the project. See the 'Survey Settings' page in the Online Designer for this survey-level setting.

Save Cancel

Step 4: When creating a record for the participant, make sure to complete the email address field that was created above in Steps 2 and 3.

Service Request

invitation status: Survey options

Editing existing Record ID 1

Record ID	1
Date of Request <small>* must provide value</small>	09-29-2017
Name of Individual Requesting Service <small>* must provide value</small>	Henderson, Tripp
Email <small>* must provide value</small>	phenders@wakehealth.edu
Department (Organization if outside of Wake Forest) <small>* must provide value</small>	CTSI
Position <small>* must provide value</small>	Research Support Staff

Optional: Navigate to the Participant List tab and confirm the email address appears in the chart.

Manage Survey Participants

Public Survey Link Participant List Survey Invitation Log

The Participant List option allows you to **send a customized email** to anyone in your list and **track who responds to your survey**. It is also possible to identify an individual's survey answers, if desired, by providing an Identifier for each participant (this feature must first be enabled by clicking the 'Enable' button in the table below). Note: All survey responses collected are considered anonymous unless you 1) are using Participant Identifiers or 2) have enabled the designated email field for invitations. [More details](#)

Email	Record	Participant Identifier (optional) Disable	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
a@wakehealth.edu	5			-			
1) mharbour@wakehealth.edu	2		✓	-			
2) mharbour@wakehealth.edu	3		✓	-			
3) mharbour@wakehealth.edu	4		✓	-			
phenders@wakehealth.edu	1			-			

Step 5: When you are ready to send the survey(s) to the participants, navigate to the Participant List and select the 'Participant List belonging to' from the drop down then click on 'Compose Survey Invitations.'

Manage Survey Participants

Public Survey Link **Participant List** Survey Invitation Log

The Participant List option allows you to **send a customized email** to anyone in your list and **track who responds to your survey**. It is also possible to identify an individual's survey answers, if desired, by providing an Identifier for each participant (this feature must first be enabled by clicking the 'Enable' button in the table below). Note: All survey responses collected are considered anonymous unless you 1) are using Participant Identifiers or 2) have enabled the designated email field for invitations. [More details](#)

Email	Record	Participant Identifier (optional) Disable	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
a@wakehealth.edu	5			-			
1) mharbour@wakehealth.edu	2		✓	-			
2) mharbour@wakehealth.edu	3		✓	-			
3) mharbour@wakehealth.edu	4		✓	-			
phenders@wakehealth.edu	1			-			

Complete the information and then click 'Send Invitations.'

NOTE: If you decide against sending a survey to a participant, you can uncheck their name manually.

When using the Participant List to email survey links, the link is specific to the participant. Please encourage the participants **not** to forward their emails with the link to other participants.

✉ **Send a Survey Invitation to Participants**
⌵

Info
Survey title: Service Request

When should the emails be sent?
 Immediately
 At specified time: (W/E/V/T/M)
The time must be for the time zone America/New_York, in which the current time is 07/23/2018 09:32.

Enable reminders
 Re-send invitation as a reminder if participant has not responded by a specified time?

Compose message
 From: phenders@wakehealth.edu
 To: [All participants selected from Participant List]
 Subject:

Compose
Preview
Send test email

Please take this survey.

You may open the survey in your web browser by clicking the link below:
[survey-link]

If the link above does not work, try copying the link below into your web browser:

NOTE: You may modify or remove any text you wish in the Compose Message text box above. Make sure you include either [survey-link] or [survey-ur] in the text or else the participant will not have a way to take the survey.

You may use HTML formatting in the email message: bold, <u> underline, <i> italics, link, etc.

[How to use Piping in the survey invitation](#)

Participant List
(those who have not responded completely)

Actions: -- check/uncheck participants --

	Email (2 selected)	Participant Identifier	Scheduled?	Sent?	Respond
<input checked="" type="checkbox"/>	a@wakehealth.edu (ID 5)		-	-	-
<input checked="" type="checkbox"/>	phenders@wakehealth.edu (ID 1)		-	-	-

NOTE: Please be sure to test the project thoroughly to ensure the Survey Participant List is functioning correctly. Once you have tested the project, please place the project into production before collecting any real data. If the project requires IRB/IACUC approval, please ensure you have approvals before collecting any real data.

REDCap – Survey Queue

The Survey Queue displays a list of surveys to a participant on a single page. The queue contains the survey's **to be** completed as well as the surveys that have **already been** completed. Surveys are set to appear in the Survey Queue based on conditions set by a user, such as when a particular survey has been completed and/or if certain conditions have been met.

Section A: If the project forms are surveys

Step 1:

- To create a Survey Queue, first enable the forms to be used as surveys.
- Navigate to the Online Designer and click on Survey Queue.

In this example, all forms are surveys.

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.

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Demographics	6			Choose action	Survey settings + Automated Invitations
Test 1	0			Choose action	Survey settings + Automated Invitations
Test 2	0			Choose action	Survey settings + Automated Invitations
Test 3	10			Choose action	Survey settings + Automated Invitations

Step 2:

- At the top of the Survey Queue box, a User can click on [Add custom text to display at top of survey queue](#) to add any custom text to the top of the queue.

Custom text to display at top of survey queue (optional) – If no custom text is provided, then [this text](#) will be displayed by default. [Hide]

You may use Piping or HTML formatting in the custom text: `` bold, `<u>` underline, `<i>` italics, `` link, etc. [How to use Piping](#)

Step 3:

- Activate the survey(s) you want included in the queue then complete the 'Display survey in the Survey Queue when...' section for each survey.
 - The surveys can be displayed in the queue based on a) another survey being completed and/or b) based on a logic statement of variables with the project (this is covered in Section B below).
- If you want the survey to automatically start as soon as the condition is met, then click on the 'Auto Start?' checkbox.

In this example, we want the Test 1 survey to appear in the queue once the Demographics survey has been completed. Additionally, in this example, we want to automatically start the Test 1 survey as soon as the Demographics survey has been completed.

Custom text to display at top of survey queue (optional) – If no custom text is provided, then [this text](#) will be displayed by default. [Hide]

Please complete the surveys below. Please contact ABC with any questions. Thank you

You may use Piping or HTML formatting in the custom text: bold, <u> underline, <i> italics, link, etc. [How to use Piping](#)

Activated?	Survey Title	Display survey in the Survey Queue when...	Auto start?
 Activated <input type="button" value="Deactivate"/>	"Test 1"	<input checked="" type="checkbox"/> When the following survey is completed: "Demographics" AND ▾ <input type="checkbox"/> When the following logic becomes true: How to use this <input type="text"/> (e.g., [age] > 30 and [gender] = "1")	<input checked="" type="checkbox"/>

Step 4:

- Continue activating the remaining surveys that will be used in the queue.

To continue with the example, we will want Test 2 and Test 3 to appear once the previous surveys have been completed, but we do not want the auto start functionality for these surveys.

Set up Survey Queue

The Survey Queue displays a list of your surveys to a participant all on a single page. In which the queue comprises all surveys that are to be completed (like a 'to-do' list) as well as the surveys that the participant has already completed. [Tell me more](#)

NOTE: The first instrument survey is not displayed below because it does not have a survey that comes before it for which to set conditions.

Custom text to display at top of survey queue (optional) – If no custom text is provided, then [this text](#) will be displayed by default. [Hide]

Please complete the surveys below. Please contact ABC with any questions. Thank you

You may use Piping or HTML formatting in the custom text: bold, <u> underline, <i> italics, link, etc. [How to use Piping](#)

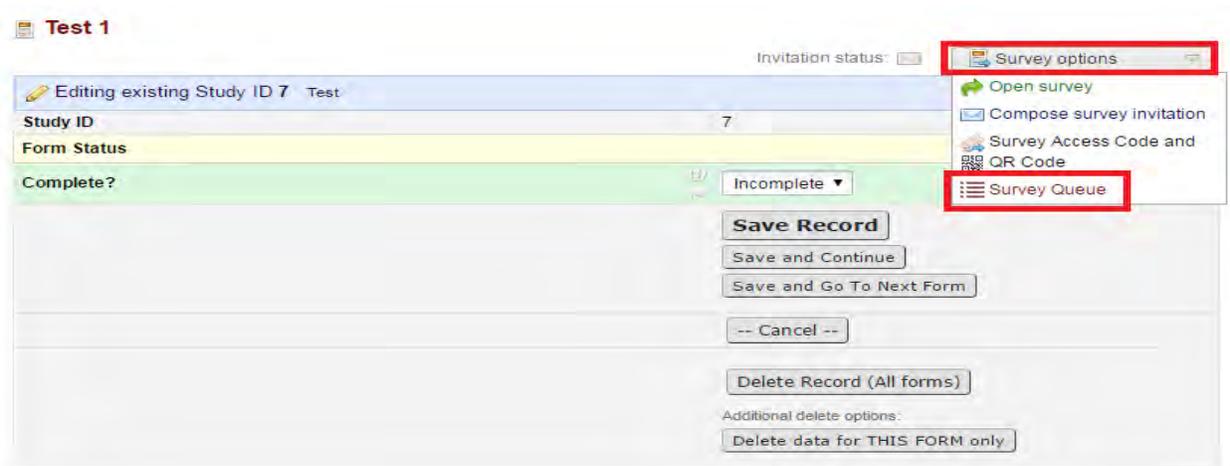
Activated?	Survey Title	Display survey in the Survey Queue when...	Auto start?
 Activated <input type="button" value="Deactivate"/>	"Test 1"	<input checked="" type="checkbox"/> When the following survey is completed: "Demographics" AND ▾ <input type="checkbox"/> When the following logic becomes true: How to use this <input type="text"/> (e.g., [age] > 30 and [gender] = "1")	<input checked="" type="checkbox"/>
 Activated <input type="button" value="Deactivate"/>	"Test 2"	<input checked="" type="checkbox"/> When the following survey is completed: "Test 1" AND ▾ <input type="checkbox"/> When the following logic becomes true: How to use this <input type="text"/> (e.g., [age] > 30 and [gender] = "1")	<input type="checkbox"/>
 Activated <input type="button" value="Deactivate"/>	"Test 3"	<input checked="" type="checkbox"/> When the following survey is completed: "Test 2" AND ▾ <input type="checkbox"/> When the following logic becomes true: How to use this <input type="text"/> (e.g., [age] > 30 and [gender] = "1")	<input type="checkbox"/>

- Once you have the queue created, click on 'Save.'

Step 5:

- To open a participant's survey queue and to provide them with their Survey Queue URL, navigate to a survey form within an individual's record.

- In the top right of the form, open the drop down selections for ‘Survey Options.’
- Click on ‘Survey Queue.’
- Note: The queue URL is specific to the participant. Please encourage the participants not to forward their URLs to other participants.



- The survey queue can act as a checklist for the participant. The individual is able to see the list of surveys that have been completed and the surveys that are remaining to be completed (Image 1).
- To obtain the participant’s survey queue URL, click the ‘Get link to my survey queue’ button. This will open the options to a) copy the URL or b) to enter the participant’s email address to automatically send the URL (Image 2).

Image 1

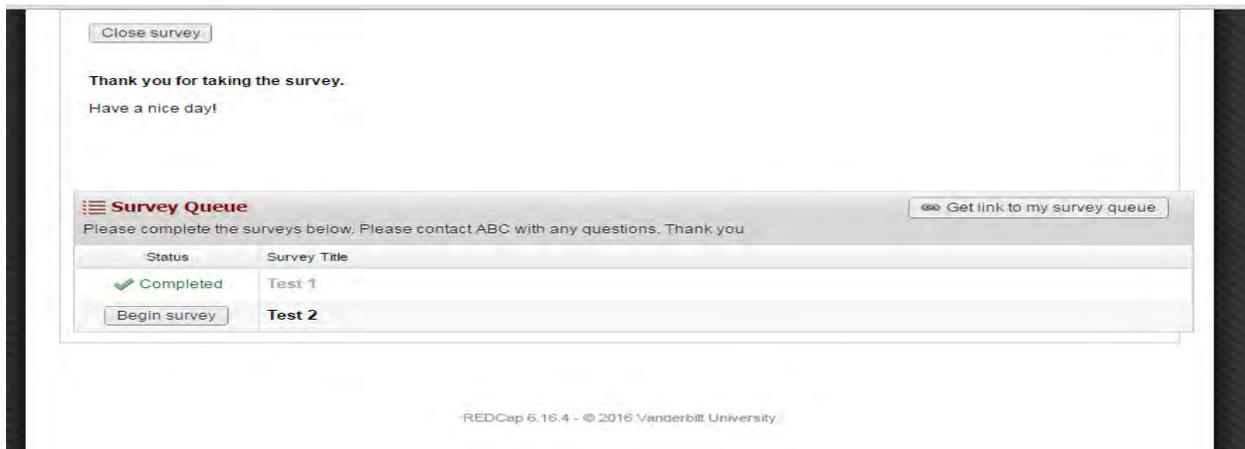


Image 2

Get link to my survey queue [X]

To obtain your survey queue link, which will allow you to return to your survey queue in the future, you may copy and paste the link displayed in the text box below, or you may have it emailed to you at your email address.

Copy and paste the survey queue link

— OR —

Send the survey queue link in an email

* Your email address will not be stored

Section B: If the project contains traditional data collection forms and surveys

If the project contains traditional data collection forms and surveys, and the survey queue is dependent upon certain data collection forms (or variables within other forms) being completed prior to a survey appearing in the Survey Queue, then the 'Display the survey in the Survey Queue when...' section will utilize the 'when the following logic becomes true' option.

Step 1:

- Enable any forms that will be used as surveys (instead of as data collection instruments).
- If various forms will be traditional data collection instruments instead of surveys, please do not change them to surveys.
- Navigate to the Online Designer and click on Survey Queue.

In this example, the Demographics form and the Test 2 form will be traditional data collection forms.

Project Home | Project Setup | **Online Designer** | Data Dictionary

VIDEO: How to use this page

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

Survey options: **Survey Queue** | Survey Login | Survey Notifications

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

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Demographics	6		Enable	Choose action	Survey settings +Automated Invitations
Test 1	0		Enable	Choose action	Survey settings +Automated Invitations
Test 2	0		Enable	Choose action	Survey settings +Automated Invitations
Test 3	10		Enable	Choose action	Survey settings +Automated Invitations

Step 2:

- At the top of the Survey Queue box, a User can click on  [Add custom text to display at top of survey queue](#) to add any custom text to the top of the queue.

Custom text to display at top of survey queue (optional) – If no custom text is provided, then [this text](#) will be displayed by default. [Hide]

You may use Piping or HTML formatting in the custom text: bold, <u> underline, <i> italics, link, etc. [How to use Piping](#)

Step 3:

- Activate the survey(s) you want included in the queue then complete the ‘Display survey in the Survey Queue when...’ section for each survey.
- If you want the survey to automatically start as soon as the condition is met, then click on the ‘Auto Start?’ checkbox.

In this example, we want the

a) Test 1 survey to appear in the queue once the Demographics form has been completed.
and

b) Test 3 survey to appear in the queue once the Test 2 form has been completed.

Since the Demographics form and the Test 2 form are traditional data collection instruments, we will need to use the ‘when the following logic becomes true’ option.

For the purposes of this example, we want the Test 1 survey and the Test 2 survey to appear when the Demographics form and Test 2 form are marked ‘Complete.’

1. Navigate to the codebook to determine the variable names for the complete variables. The codebook can be found on the Project Home page.

In this example, here are our variables from the codebook

7	demographics_complete	Section Header: <i>Form Status</i> Complete?	dropdown 0 Incomplete 1 Unverified 2 Complete
9	test_2_complete	Section Header: <i>Form Status</i> Complete?	dropdown 0 Incomplete 1 Unverified 2 Complete

2. Return to the Survey Queue and enter the logic statement into the ‘Display Survey when...’ section. Click on Save.

Custom text to display at top of survey queue (optional) – If no custom text is provided, then [this text](#) will be displayed by default. [Hide]

Please complete the surveys below. Please contact ABC with any questions. Thank you

You may use Piping or HTML formatting in the custom text: bold, <u> underline, <i> italics, link, etc. [How to use Piping](#)

Activated?	Survey Title	Display survey in the Survey Queue when...	Auto start?
 Activated <input type="button" value="Deactivate"/>	"Test 1"	<input type="checkbox"/> When the following survey is completed: --- select a survey --- AND ▾ <input checked="" type="checkbox"/> When the following logic becomes true: How to use this <input 2\""="" type="text" value="[demographics_c_complete]=\"/> <small>(e.g., [age] > 30 and [gender] = \"1\")</small>	<input type="checkbox"/>
 Activated <input type="button" value="Deactivate"/>	"Test 3"	<input type="checkbox"/> When the following survey is completed: --- select a survey --- AND ▾ <input checked="" type="checkbox"/> When the following logic becomes true: How to use this <input 2\""="" type="text" value="[test_2_complete]=\"/> <small>(e.g., [age] > 30 and [gender] = \"1\")</small>	<input type="checkbox"/>

Continue with Step 5 above for obtaining the Survey Queue URL for the participant.

NOTE: Please be sure to test the project thoroughly to ensure the Survey Queue is functioning correctly. Once you have tested the project, please place the project into production before collecting any real data. If the project requires IRB/IACUC approval, please ensure you have approvals before collecting any real data.