

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.'

The screenshot shows the REDCap Project Setup interface. At the top, there are navigation tabs: 'Project Home', 'Project Setup', 'Other Functionality', and 'Project Revision History'. Below the tabs, the project status is 'Development' and it shows 'Completed steps 0 of 7'. The main content area is divided into two sections, both marked as 'Not started' with a red 'X' icon and an 'I'm done!' button.

Main project settings

- 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

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](#)

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

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 the tabs, there is a video link: [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	randomizi	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