INTRODUCTION TO REDCap

Presenter: Troy Moon, MD, MPH

PEER Liberia Research Capacity Building Workshop
TODAY’S AGENDA

- History & Background
- Seminar Topics
- Live Demos
- Q&A (anytime!)
History & Background
WHO CREATED REDCAP & WHO USES IT?

**THEN**
- 2004: Developed at Vanderbilt Univ.
- 2006: Global consortium started
- 200?: (YOUR INSTITUTION) joined
- 200?: (YOUR GROUP) created

**NOW**
- Worldwide:
  - +2400 institutions / 115 countries
  - +430,000 projects
  - +559,000 users
WHAT IS REDCAP?

**Web-based software** used to create and manage research databases and participant surveys.

**Developed as a tool** to help researchers collect and manage data effectively and responsibly.
WHAT ARE THE ADVANTAGES?

**Accessible**
- web-based access
- access for multi-site collaborations

**Customizable**
- fast and flexible to design
- modifications at anytime

**Accurate**
- ensures consistent and accurate data entry
- data quality checks to look for errors

**Secure**
- user authentication
- nightly backups, weekly vulnerability scans

**Free**
- includes training, design guidance, troubleshooting
SEMINARS TOPICS

**Project Setup**
- Creating a project
- Adding and editing fields
- Optional modules and customizations
- Testing your project
- Moving to production

**Using Surveys**
- Enabling surveys
- Settings & customizations
- Public link vs private links

**Applications & Tools**
- Record status dashboard
- Project change log
- Exports and reports
- Data dictionary
- File repository
Project Setup
Please log in with your user name and password. If you are having trouble logging in, please contact REDCap Support.
Welcome to REDCap!

REDCap is a mature, secure web application for building and managing online surveys and databases. Using REDCap's stream-lined process for rapidly developing projects, you may create and design projects using 1) the online method from your web browser using the Online Designer; and/or 2) the offline method by constructing a 'data dictionary' template file in Microsoft Excel, which can be later uploaded into REDCap. Both surveys and databases (or a mixture of the two) can be built using these methods.

REDCap provides automated export procedures for seamless data downloads to Excel and common statistical packages (SPSS, SAS, Stata, R), as well as a built-in project calendar, a scheduling module, ad hoc reporting tools, and advanced features, such as branching logic, file uploading, and calculated fields.

Learn more about REDCap by watching a brief summary video (4 min). If you would like to view other quick video tutorials of REDCap in action and an overview of its features, please see the Training Resources page.

Please note that any publication that results from a project utilizing REDCap should cite grant support (NIH CTSA UL1 TR000430).

NOTICE: If you are collecting data for the purposes of human subjects research, review and approval of the project is required by your Institutional Review Board.

If you require assistance or have any questions about REDCap, please contact REDCap Support.
CREATE A PROJECT

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:  
Training Demo  
Title to be displayed on project webpage

Purpose of this project:  
Practice / Just for fun

Assign project to a Project Folder?  

Project notes (optional):  
training

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)

Choose a project template  
(comes pre-filled with fields, forms/surveys, and other settings)

<table>
<thead>
<tr>
<th>Template title (sorted by title)</th>
<th>Template description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic Demography</td>
<td>Contains a single data collection instrument to capture basic demographic information.</td>
</tr>
<tr>
<td>Classic Database</td>
<td>Contains six data entry forms, including forms for demographics and baseline data, three monthly data forms, and concludes with a completion data form.</td>
</tr>
<tr>
<td>Human Cancer Tissue Biobank</td>
<td>Contains five data entry forms for collecting and tracking information for cancer tissue.</td>
</tr>
<tr>
<td>Longitudinal Database (1 arm)</td>
<td>Contains nine data entry forms (beginning with a demographic form) for collecting data longitudinally over eight different events.</td>
</tr>
<tr>
<td>Longitudinal Database (2 arms)</td>
<td>Contains nine data entry forms (beginning with a demographic form) for collecting data on two different arms (arms A and arms B) with each arm containing eight different events.</td>
</tr>
</tbody>
</table>

Create Project  
Cancel
PROJECT SETUP STEPS

1. Main project settings
   - Use longitudinal data collection with repeating forms?
   - Use surveys in this project?
   - Modify project title, purpose, etc.

2. Design your data collection instruments
   - Add or edit fields in your data collection instruments. This may be done by either using the Online Designer (interactive method) or by uploading a Data Dictionary (offline method), to which you may refer either method or both.
   - Quick links: Download PDF of all data collection instruments OR Download the current Data Dictionary

3. Enable optional modules and customizations
   - Auto-numbering for records?
   - Scheduling records (longitudinal only)?
   - Additional customizations

4. Set up project bookmarks (optional)
   - You may create custom bookmarks to workarounds that exist inside or outside of REDCap. These bookmarks will be listed on the left-hand project menu and can be accessed at any time by users who are given privileges to do so. Every project bookmark has custom settings that allow one to control its appearance and behavior.

5. User Rights and Permissions
   - You may grant other users access to this project or allow the privileges of current users on this project by navigating to the User Rights page. Additionally, you may want to set user access to certain user segments for this project, which may need to use Data Access Groups, in which only users within a given Data Access Group can access records created by users within that group.

6. Test your project thoroughly
   - It is important to test the essential components of your project before moving it into production. Try creating a few test records and entering some data for each to ensure that your data collection instruments work and behave how you expect. Additionally, always test and ensure that reports and exporting data to take in SIS or a statistical analysis package. If you have surveys, complete the surveys in FY23; if you are a researcher, complete the surveys in FY23; and if you are a participant, send the survey invitation to yourself. Other project modules will be used regularly, test them out and test them out.
   - The best way to test your project is to go live with it or if you are entering test production data, and it is always helpful to test with colleagues (especially learns members) before a production test.

7. Move your project to production status
   - Move the project to production status so that real data can be collected. Once in production, you will not be able to edit the project fields in real-time anymore. However, you can access edits in Draft Mode, which will then need to be approved by a REDCap administrator before being applied.
STEP 1: PROJECT SETUP

Main project settings

- Use longitudinal data collection with repeating forms? [Enable]
- Use surveys in this project? [Enable]  
  VIDEO: How to create and manage a survey

Modify project title, purpose, etc.
STEP 2: DATA COLLECTION INSTRUMENTS

Main project settings

- Enable Use longitudinal data collection with repeating forms? [ ]
- Enable Use surveys in this project? [ ]

*VIDEO: How to create and manage a survey*

Modify project title, purpose, etc.

Design your data collection instruments

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 Online Designer or Data Dictionary

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

Have you checked the Check For Identifiers page to ensure all identifier fields have been tagged?
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

<table>
<thead>
<tr>
<th>Instrument name</th>
<th>Fields</th>
<th>View PDF</th>
<th>Instrument actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Demographics</td>
<td>1</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

**Add instrument here**
Ready to add fields

You may now begin adding fields to your data collection instrument below using the Online Designer. Alternatively, you may build your fields in the Data Dictionary (offline method) by clicking its tab above.

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 page allows you to build and customize your data collection instruments one field at a time. You may add new fields or edit existing ones. New fields may be added by clicking the Add Field buttons. You can begin editing an existing field by clicking on the Edit icon. If you decide that you do not want to keep a field, you can simply delete it by clicking on the Delete icon. To reorder the fields, simply drag and drop a field to a different position within the form below. NOTE: While in development status, all field changes will take effect immediately in real time.

Current instrument: Demographics

<table>
<thead>
<tr>
<th>Variable: record_id</th>
</tr>
</thead>
<tbody>
<tr>
<td>Record ID</td>
</tr>
</tbody>
</table>

NOTE: The field above is the record ID field and thus cannot be deleted or moved. It can only be edited.
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:

---- Select a Type of Field ----
- Text Box (Short Text, Number, Date/Time, ...)
- Notes Box (Paragraph Text)
- Calculated Field
- Multiple Choice - Drop-down List (Single Answer)
- Multiple Choice - Radio Buttons (Single Answer)
- Checkboxes (Multiple Answers)
- Yes - No
- True - False
- Signature (draw signature with mouse or finger)
- File Upload (for users to upload files)
- Slider / Visual Analog Scale
- Descriptive Text (with optional Image/Video/Audio/File Attachment)
- Begin New Section (with optional text)
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

Variable Name (utilized during data export)

ONLY letters, numbers, and underscores

Enable auto naming of variable based upon its Field Label?

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

-- OR --

Enable searching within a biomedical ontology?

-- choose ontology to search --

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

Save Cancel
How often do you eat the following flavors of ice cream?

<table>
<thead>
<tr>
<th></th>
<th>Never</th>
<th>Rarely</th>
<th>Sometimes</th>
<th>Often</th>
<th>Always</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chocolate</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Strawberry</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vanilla</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Butter Pecan</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mint Chocolate Chip</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

NOTE: The field above is the record ID field and thus cannot be deleted or moved. It can only be edited.
### Add Matrix of Fields

You may add or edit a matrix (i.e. grid) of project fields on this data collection instrument by completing the fields below. By providing all necessary info below and clicking Save, the new matrix of fields will be added to the form on this page. A Field Label and Variable name must be provide for each field in the matrix and you must also set the Choices (i.e. matrix column headers) and answer format (Single Answer vs. Multiple Answers) for the entire matrix. View a matrix example or Read more about matrix fields on the Help & FAQ.

Matrix Header Text (optional)
How often do you eat the following flavors of ice cream?

<table>
<thead>
<tr>
<th>Field Label</th>
<th>Variable Name</th>
<th>Required?</th>
<th>Field Annotation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chocolate</td>
<td>choc</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Strawberry</td>
<td>straw</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vanilla</td>
<td>van</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Butter Pecan</td>
<td>butpec</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mint Chocolate Chip</td>
<td>mintcc</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Matrix Rows
Each row represents a different field with its own label and variable name.

Matrix Column Choices
Choices (one choice per line)
1. Never
2. Rarely
3. Sometimes
4. Often
5. Always

Other Matrix Info
Answer Format:
- Single Answer (Radio Buttons)

Ranking: What is a ranked matrix of fields?
- Allow only 1 choice to be selected per column (radio buttons only)

Matrix group name: ONLY letters, numbers, and underscores
- icecream matrix

Save  Cancel
What is your favorite flavor of ice-cream?

- Chocolate
- Strawberry
- Vanilla
- Butter Pecan
- Mint Chocolate Chip

Check all that apply
What is your favorite kind of ice cream?
- Chocolate
- Strawberry
- Vanilla
- Other

If other, please specify
Branching Logic may be employed when fields/questions need to be hidden under certain conditions. If branching logic is defined, the field will only be visible if the conditions provided are true (i.e., show the field only if...). You may specify those conditions in the text box below for the Advanced Branching Logic Syntax or by choosing the Drag-N-Drop Logic Builder method, which allows you to build your logic in a much easier fashion by simply dragging over the options you want. You may switch back and forth between each method if you wish, but please be aware that since the advanced logic allows for greater complexity, it may not be able to be switched over to the Drag-N-Drop method if it becomes too complex.

Choose method below for the following field: other_text - If other, please specify

- Advanced Branching Logic Syntax
  Show the field ONLY if...

- OR -

- Drag-N-Drop Logic Builder
  Displaying field choices for the following data collection instrument:
  Form 1 Set Up As A Survey
  Field choices from other fields (drag a choice below to box on right):
  fav_icecream = Chocolate (1)
  fav_icecream = Strawberry (2)
  fav_icecream = Vanilla (3)
  fav_icecream = Other (4)
  icecream = Chocolate (1)
  icecream = Strawberry (2)
  icecream = Vanilla (3)
  icecream = Other (4)
  icecream_other = (define criteria)
  Show the field ONLY if...
  • ALL below are true
  • ANY below are true
  Drag and Drop
  Clear logic
**Without Piping:**

What kind of ice cream do you like?
- Chocolate
- Strawberry
- Vanilla

How often do you eat _____ ice cream?
- Once a week
- Twice a week
- Three times a week

**With Piping:**

What kind of ice cream do you like?
- Chocolate
- Strawberry
- Vanilla

How often do you eat Chocolate ice cream?
- Once a week
- Twice a week
- Three times a week
PIPING LOGIC

What kind of ice cream do you like?
- Chocolate
- Strawberry
- Vanilla

How often do you eat [ice cream] ice cream?
- Once a week
- Twice a week
- Three times a week

Field Type: Multiple Choice - Radio Buttons (Single Answer)

Field Label: How often do you eat [ice cream] ice cream?

Choices (one choice per line):
1. Once a week
2. Twice a week
3. Three times a week

Field Note (optional)
STEP 3: OPTIONAL MODULES & CUSTOMIZATIONS

Enable optional modules and customizations

- Auto-numbering for records
- Scheduling module (longitudinal only)
- Randomization module
- Designate an email field to use for invitations to survey participants

Additional customizations
**STEP 4: PROJECT BOOKMARKS**

Set up project bookmarks (optional)

You may create custom bookmarks to webpages that exist inside or outside of REDCap. These bookmarks will be seen as links on the left-hand project menu and can be accessed at any time by users who are given privileges to do so. Every project bookmark has custom settings that allow one to control its appearance and behavior.

Go to Add or edit bookmarks

<table>
<thead>
<tr>
<th>Link #</th>
<th>Link Label</th>
<th>Link URL / Destination</th>
<th>Link Type</th>
<th>User Access</th>
<th>Opens new window</th>
<th>Append record info to URL</th>
<th>Append project ID to URL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add</td>
<td>Asthma Center</td>
<td><a href="http://asthma.bsd.uchicago.edu/">http://asthma.bsd.uchicago.edu/</a></td>
<td>Simple Link</td>
<td>All users</td>
<td>√</td>
<td>[]</td>
<td>[]</td>
</tr>
</tbody>
</table>
STEP 5: USER RIGHTS

This page may be used for granting users access to this project and for managing the user privileges of those users. You may also create roles to which you may assign users (optional). User roles are useful when you will have several users with the same privileges because they allow you to easily add many users to a role in a much faster manner than setting their user privileges individually. Roles are also a nice way to categorize users within a project. In the box below you may add/assign users or create new roles, and the table at the bottom allows you to make modifications to any existing user or role in the project, as well as view a glimpse of their user privileges.

Add new users: Give them custom user rights or assign them to a role.

- Add new user
  - Add with custom rights
  - OR

- Assign new user
  - Assign to role

Create new roles: Add new user roles to which users may be assigned.

- Enter new role name
  - Create role

(e.g., Project Manager, Data Entry Person)
STEP 5: USER RIGHTS

**Basic Rights**

- **Expiration Date** (if applicable)
- **Project Design and Setup**
- **User Rights**
- **Data Access Groups**

**Highest level privileges:**

- **Data Exports**
  - "De-Identified means that all free-form text fields will be removed, as well as any data/time fields and identifier fields.

- **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?

**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.

<table>
<thead>
<tr>
<th>Form 1 Set Up As A Survey (survey)</th>
<th>No Access</th>
<th>Read Only</th>
<th>View &amp; Edit</th>
<th>Edit Survey responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Formatting Fun (survey)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**New User Notification**

- Notify user of their project access via email? [✓]

[Add user] [Cancel]
STEP 6: TEST YOUR PROJECT

Test your project thoroughly

It is important to test the essential components of your project before moving it into production. Try creating a few test records and entering some data for each to ensure that your data collection instruments look and behave how you expect, especially branching logic and calculations. Then review your test data by creating reports and exporting your data to view in Excel or a statistical analysis package. If you have surveys, complete the surveys as if you were a participant by using the Public Survey Link or Participant List by sending a survey invitation to yourself. If other project modules will be used regularly, test them out a bit too. The best way to test your project is to use it as if you were entering real production data, and it is always helpful to have colleagues (especially team members) take a look at your project to get a fresh set of eyes looking at it.
STEP 7: MOVE TO PRODUCTION

Move your project to production status

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 then need to be approved by a REDCap administrator before taking effect.

Go to Move project to production
Live Demo
Using Surveys
ENABLING SURVEYS

Step 1:

Main project settings

- Enable
- Disable

Use surveys in this project?

Use longitudinal data collection with repeating forms?

Modify project title, purpose, etc.

Video: How to create and manage a survey

Step 2:

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

<table>
<thead>
<tr>
<th>Instrument name</th>
<th>Fields</th>
<th>View PDF</th>
<th>Enabled as survey</th>
<th>Instrument actions</th>
<th>Survey-related options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Demographics</td>
<td>20</td>
<td></td>
<td>Enable</td>
<td>Choose action</td>
<td></td>
</tr>
</tbody>
</table>
**Survey Design Options**

**Logo**
(Optional: display an image above the survey title)

**Size of survey text**

**Font of survey text**

**Survey theme**

Survey design preview (sample survey):

This is the survey title

Your survey instructions will go here. The instructions can tell your survey participant about the purpose of the survey once they have completed the survey. Below is a listing of various question types that might be displayed on your survey.

This is a section header to divide the survey page into sections.

What is your first name?

What days of the week do you work? (check all that apply)
**Survey Customizations**

**Question Numbering**
- Auto numbered

**Question Display Format**
- All on one page
- Display page numbers at top of survey page
- Hide the 'Previous Page' button (i.e., Back button) on the survey page (prevents respondents from going back to previous pages)

**For 'Required' fields, display the red 'must provide value' text on the survey page?**
- Yes

**Allow survey respondents to view aggregate survey results after completing the survey?**
- Disabled

**Additional settings:**
- Minimum number of responses required before participants are allowed to view aggregate data (recommended = 10).
- Do not show plots for questions lacking diversity in response values? (What does this mean?)

**Text-To-Speech functionality**
- Disabled

**NOTICE:** All text that is spoken is sent to a service hosted at Vanderbilt University that utilizes the AT&T Text-to-Speech API service. Be advised that if the survey utilizes piping, for privacy concerns, data piped from identifier fields will *not* be sent to the service with the rest of the text but will instead be redacted.

*Super users: How to disable this feature*
Survey Access:

- **Survey Expiration (optional)**
  
  *Time after which the survey will become inactive.*
  
  The time must be in the time zone America/Chicago, in which the current time is 08/11/2016 13:18.

- **Allow 'Save & Return Later' option for respondents?**
  
  *Allow respondents to leave the survey and return later.*

- **Allow respondents to return and modify completed responses?**
  
  No

Survey Termination Options:

- **(Optional) Auto-continue to next survey:** Automatically start the next survey instrument after finishing this survey.

- **Redirect to a URL:**
  Redirect to a webpage when survey is completed.
  - Provide a full URL, e.g., `http://www.example.com/mypage.html`.
  - [How to use Piping here](#)

- **Survey Completion Text:**
  Displayed after survey is completed as 'thank you' text or as acknowledgement text.
  - Thank you for taking the survey.
  - Have a nice day!
  - [How to use Piping here](#)

- **Send confirmation email (optional)?**
  Email the respondent when they complete the survey.
  - No✅

[Save Changes]
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. [Get shorter survey link](https://redcap.uchicago.edu/surveys/?s=8v66iUVcg) or [Get embed code to place link on a webpage](http://tinyurl.com/1HLs7Yi).

**Public Survey URL:** https://redcap.uchicago.edu/surveys/?s=8v66iUVcg

**OR**

**Short Public Survey URL:** http://tinyurl.com/1HLs7Yi

Copy the HTML in the text box below to place it within the HTML code of any webpage. It will show up as a link on that webpage so that anyone can easily click the link to begin taking your survey.

**Embed HTML code <>**

```
<a href="https://redcap.uchicago.edu/surveys/?s=8v66iUVcg..." CONTACT COPY TO CLIPBOARD
```

[Open public survey](https://redcap.uchicago.edu/surveys/?s=8v66iUVcg)  [Send me URL via email](http://tinyurl.com/1HLs7Yi)
PRIVATE SURVEY LINKS

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]

<table>
<thead>
<tr>
<th>Email</th>
<th>Participant Identifier (optional)</th>
<th>Link</th>
<th>Invitation Scheduled?</th>
<th>Invitation Sent?</th>
<th>Responded?</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="mailto:arodrigu1@bsd.uchicago.edu">arodrigu1@bsd.uchicago.edu</a></td>
<td>Alex Rodriguez</td>
<td>☐</td>
<td>-</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td><a href="mailto:braumann@bsd.uchicago.edu">braumann@bsd.uchicago.edu</a> (ID 2)</td>
<td>Bonnie Trumann</td>
<td>☐</td>
<td>-</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td><a href="mailto:braumann@ci.uchicago.edu">braumann@ci.uchicago.edu</a> (ID 3)</td>
<td>Brenda Starr</td>
<td>-</td>
<td>-</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td><a href="mailto:brigitte_raumann@yahoo.com">brigitte_raumann@yahoo.com</a></td>
<td>Brigitte Raumann</td>
<td>☐</td>
<td>-</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td><a href="mailto:demoore82@gmail.com">demoore82@gmail.com</a></td>
<td>Derrick Moore</td>
<td>☐</td>
<td>-</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td><a href="mailto:jmtaylor@yahoo.com">jmtaylor@yahoo.com</a></td>
<td>Jim Taylor</td>
<td>☐</td>
<td>-</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td><a href="mailto:john.williams@hotmail.com">john.williams@hotmail.com</a></td>
<td>John Williams</td>
<td>☐</td>
<td>-</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td><a href="mailto:kie@bsd.uchicago.edu">kie@bsd.uchicago.edu</a></td>
<td>Kevin Le</td>
<td>☐</td>
<td>-</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td><a href="mailto:nbahroos@bsd.uchicago.edu">nbahroos@bsd.uchicago.edu</a></td>
<td>Neil Bahroos</td>
<td>☐</td>
<td>-</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td><a href="mailto:putnamtr@gmail.com">putnamtr@gmail.com</a></td>
<td>ID 4930-72</td>
<td>☐</td>
<td>-</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>
Applications & Tools
**Record Status Dashboard**

- **Form Status**
  - **Complete?**
    - Complete

- **Save Record**
  - Save and Continue

---

**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 or 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](iconIncomplete.png)
- ![Incomplete (no data saved)](iconIncompleteNoDataSaved.png)
- ![Unverified](iconUnverified.png)
- ![Partial Survey Response](iconPartialSurveyResponse.png)
- ![Complete](iconComplete.png)
- ![Completed Survey Response](iconCompletedSurveyResponse.png)

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

<table>
<thead>
<tr>
<th>Study Id</th>
<th>Ice Cream Survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>✅</td>
</tr>
<tr>
<td>2</td>
<td>✅</td>
</tr>
<tr>
<td>3</td>
<td>✅</td>
</tr>
<tr>
<td>4</td>
<td>❌</td>
</tr>
<tr>
<td>5</td>
<td>☢️</td>
</tr>
</tbody>
</table>
### PROJECT CHANGE LOG

**Logging**

This module lists all changes made to this project, including data exports, data changes, and the creation or deletion of users.

Filter by event: All event types (excluding page views)
Filter by user name: All users
Filter by record: All records
Displaying events (by most recent): 1 - 28

<table>
<thead>
<tr>
<th>Time / Date</th>
<th>Username</th>
<th>Action</th>
<th>List of Data Changes OR Fields Exported</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/25/2015 2:38pm</td>
<td>jahotenga</td>
<td>Created Record 1</td>
<td>visit_date = '2015-04-27', daily_medication_list = 'Tylenol', email_address = '<a href="mailto:jahotenga@cmh.edu">jahotenga@cmh.edu</a>',</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>county(1) = checked, diabetes_indicator = '0', diabetes_tf = '0', participant_signature = '16975',</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>signed_consent_form = '16676', demographics_complete = '2', record_id = '2'</td>
</tr>
<tr>
<td>04/25/2015 2:38pm</td>
<td>[survey</td>
<td>Created Response 1</td>
<td>visit_date = '2015-04-26', daily_medication_list = 'None', email_address = '<a href="mailto:jahotenga@cmh.edu">jahotenga@cmh.edu</a>', county(1) = checked, diabetes_indicator = '0', diabetes_tf = '0', participant_signature = '16973', signed_consent_form = '16674', demographics_complete = '2', record_id = '1'</td>
</tr>
<tr>
<td></td>
<td>respondent]</td>
<td></td>
<td></td>
</tr>
<tr>
<td>04/25/2015 2:37pm</td>
<td>jahotenga</td>
<td>Manage/Design</td>
<td>Set up survey</td>
</tr>
<tr>
<td>04/25/2015 2:36pm</td>
<td>jahotenga</td>
<td>Manage/Design</td>
<td>Modify project settings</td>
</tr>
<tr>
<td>04/25/2015 2:29pm</td>
<td>jahotenga</td>
<td>Manage/Design</td>
<td>Modify project settings</td>
</tr>
<tr>
<td>04/25/2015 2:25pm</td>
<td>jahotenga</td>
<td>Manage/Design</td>
<td>Modify project settings</td>
</tr>
<tr>
<td>04/25/2015 1:47pm</td>
<td>jahotenga</td>
<td>Manage/Design</td>
<td>Create project field</td>
</tr>
<tr>
<td>04/25/2015 1:45pm</td>
<td>jahotenga</td>
<td>Manage/Design</td>
<td>Record project fields</td>
</tr>
<tr>
<td>04/25/2015 1:45pm</td>
<td>jahotenga</td>
<td>Manage/Design</td>
<td>Create project field</td>
</tr>
<tr>
<td>04/25/2015 1:23pm</td>
<td>jahotenga</td>
<td>Manage/Design</td>
<td>Create project field</td>
</tr>
<tr>
<td>04/25/2015 1:23pm</td>
<td>jahotenga</td>
<td>Manage/Design</td>
<td>Create project field</td>
</tr>
<tr>
<td>04/25/2015 1:21pm</td>
<td>jahotenga</td>
<td>Manage/Design</td>
<td>Create project field</td>
</tr>
<tr>
<td>04/25/2015 1:12pm</td>
<td>jahotenga</td>
<td>Manage/Design</td>
<td>Edit project field</td>
</tr>
</tbody>
</table>
### Data History for variable "first_name" for record "1"

Listed below is the history of all data entered for the variable "first_name" for Record ID "1". The data history results are sorted from earliest to most recent.

<table>
<thead>
<tr>
<th>Date/Time of Change</th>
<th>User</th>
<th>Data Changes Made</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/11/2016 1:36pm</td>
<td>kstewart</td>
<td>Jane</td>
</tr>
<tr>
<td>08/11/2016 1:38pm</td>
<td>kstewart</td>
<td>Susan</td>
</tr>
</tbody>
</table>
This module allows you to easily view reports of your data, inspect plots and descriptive statistics of your data, as well as export your data to Microsoft Excel, SAS, Stata, R, or SPSS for analysis (if you have such privileges). If you wish to export your "entire" data set or view it as a report, then Report A is the best and quickest way. However, if you want to view or export data from only specific instruments (or events) on the fly, then Report B is the best choice. You may also create your own custom reports below (if you have such privileges) in which you can filter the report to specific fields, records, or events using a vast array of filtering tools to make sure you get the exact data you want. Once you have created a report, you may view it as a webpage, export it out of REDCap in a specified format (Excel, SAS, Stata, SPSS, R), or view the plots and descriptive statistics for that report.

<table>
<thead>
<tr>
<th>Report name</th>
<th>View/Export Options</th>
<th>Management Options</th>
<th>Report ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>A All data (all records and fields)</td>
<td>![View Report] ![Export Data] ![Stats &amp; Charts]</td>
<td></td>
<td></td>
</tr>
<tr>
<td>B Selected instruments (all records)</td>
<td>![Make custom selections]</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

+ Create New Report
DATA EXPORTS, REPORTS, AND STATS

**Name of Report:** List of Participants Who Like Chocolate Ice Cream

**STEP 1**

**User Access:** Choose who can view this report
- All users
- Custom user access

**STEP 2**

**Fields to include in report**

<table>
<thead>
<tr>
<th>Field 1</th>
<th>Field 2</th>
<th>Field 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>record_id &quot;Study Id&quot;</td>
<td>mc_droplem &quot;Multiple Choice (Drop Down)&quot;</td>
<td>select a field</td>
</tr>
</tbody>
</table>

Add all fields from selected instrument: 

**STEP 3**

**Filters (optional)**

<table>
<thead>
<tr>
<th>Filter 1</th>
<th>Filter 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>mc_droplem &quot;Multiple Choice (Drop Down)&quot;</td>
<td>select a field</td>
</tr>
</tbody>
</table>

Operator / Value

- = Chocolate

**STEP 4**

**Order the Results (optional)**

<table>
<thead>
<tr>
<th>First by</th>
<th>Then by</th>
</tr>
</thead>
<tbody>
<tr>
<td>record_id &quot;Study Id&quot;</td>
<td>Type variable name or field label</td>
</tr>
<tr>
<td>Ascending order</td>
<td>Ascending order</td>
</tr>
</tbody>
</table>

**Save Report**

**Cancel**
<table>
<thead>
<tr>
<th>#</th>
<th>Variable / Field Name</th>
<th>Field Label</th>
<th>Field Attributes (Field Type, Validation, Choices, Branching Logic, Calculations, etc.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>record_id</td>
<td>Study ID</td>
<td>text</td>
</tr>
<tr>
<td>2</td>
<td>first_name</td>
<td>First Name</td>
<td>text, Identifier</td>
</tr>
<tr>
<td>3</td>
<td>last_name</td>
<td>Last Name</td>
<td>text, Identifier</td>
</tr>
<tr>
<td>4</td>
<td>address</td>
<td>Street, City, State, ZIP</td>
<td>notes, Identifier</td>
</tr>
<tr>
<td>5</td>
<td>telephone</td>
<td>Phone number</td>
<td>text (phone), Identifier</td>
</tr>
<tr>
<td>6</td>
<td>email</td>
<td>E-mail</td>
<td>text (email), Identifier</td>
</tr>
<tr>
<td>7</td>
<td>dob</td>
<td>Date of birth</td>
<td>text (date_ymd), Identifier</td>
</tr>
<tr>
<td>8</td>
<td>age</td>
<td>Age (years)</td>
<td>calc: Calculation: rounddown(datediff([dob], today;&quot;,y&quot;)</td>
</tr>
<tr>
<td>9</td>
<td>ethnicity</td>
<td>Ethnicity</td>
<td>radio</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>0  Hispanic or Latino</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>1  NOT Hispanic or Latino</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>2  Unknown / Not Reported</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Custom alignment: LH</td>
</tr>
<tr>
<td>10</td>
<td>race</td>
<td>Race</td>
<td>dropdown</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>0  American Indian/Alaska Native</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>1  Asian</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>2  Native Hawaiian or Other Pacific Islander</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>3  Black or African American</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>4  White</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>5  More Than One Race</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>6  Unknown / Not Reported</td>
</tr>
</tbody>
</table>
**File Repository**

This page may be used for storing and retrieving files and documents used for this project. You may upload files here to save for retrieval later, or you may download previously uploaded files in the file list below. Whenever a data export is performed, the resulting data and syntax files are stored here also.

<table>
<thead>
<tr>
<th>User Files</th>
<th>Data Export Files</th>
<th>Upload New File</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Filter by file type: ALL</th>
<th>Action</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th><strong>IRB Protocol current</strong></th>
<th><img src="download.png" alt="Download" /></th>
<th><img src="delete.png" alt="Delete" /></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th><strong>Consent Form</strong></th>
<th><img src="download.png" alt="Download" /></th>
<th><img src="delete.png" alt="Delete" /></th>
</tr>
</thead>
<tbody>
<tr>
<td>File name: Consent_Form_IRB49857479.docx</td>
<td>Date uploaded: 07/27/2010</td>
<td>File size: 9.7 KB</td>
</tr>
</tbody>
</table>
Questions
HELP RESOURCES

- Blue Button
  - Contact REDCap administrator

- Help Tab
  - Help & FAQ

- Email

- Website
Thank you!