

## **Basic User Guide**



Seton Healthcare Family Use Only

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## REDCap Usage Guide and Considerations

WARNING: REDCap is a secure system. However, the use of REDCap does not automatically ensure that your project meets regulatory or privacy requirements. Users are responsible for using REDCap in an appropriate manner and for a purpose that will be in compliance with any applicable requirements. Guidance is included below to help users determine if REDCap is the appropriate tool for their project/study.

- 1. Is your project related to human subjects research?
  - a. If yes, review and approval of the study by Seton's Research Administration is required. They will help ensure that the required administrative and regulatory functions essential to the conduct of research at Seton are covered.
- 2. Will there be any protected health information (PHI) included in your project data?
  - a. If so, access to PHI must be limited to only those project team members that have a need-to-know for project purposes.
  - b. Periodic user access reviews should be performed to determine that access is still appropriate.
  - c. Patient email addresses are PHI, as they could be used to identify the patient. Seton must have written consent from patients to use email as a communication method.
  - d. If your data containing PHI is exported to another program (excel, etc.), you are responsible for securing the data from unauthorized access.
  - e. PHI sent via email must be encrypted.
  - f. NEVER use cloud storage (Google drive, Dropbox, etc.) to store PHI. These are not secure or HIPAAcompliant storage options.
- REDCap should NEVER be used as a documentation substitute for patient treatment or an extension of patient treatment received in a Seton facility. The appropriate medical record system must be utilized (COMPASS, Athena, etc.).
- Questions related to conducting research at Seton should be directed to the Research Administration Office either by phone (512-324-8389) or through the intranet <u>http://intranet.seton.org/v2/research-</u> <u>enterprise/contact-us/</u>
- 5. Questions related to HIPAA compliance should be directed to both:
  - a. Michael Brown, Seton's Information Security Officer (512-324-9999 ext. 18796)
  - b. Vickie Paterra, Sr. Director of Corporate Responsibility & HIPAA Privacy Officer (512-324-3280)

## **REDCap Overview**

## Logging into REDCap

There are two ways to get to REDCap:

- 1. Type directly into your browser: <u>https://redcap.seton.org</u>
- 2. From Seton's Intranet click on "Web Apps" then "REDCap"

As a Seton employee, you will always use your Seton Network Username and Password. When you change your network password, it will automatically be updated in REDCap.



Username:	***
Password:	***

The first time you log in, you will need to fill out the Basic Information Form. You will then receive a confirmation email. Once you have confirmed your account, you may start using REDCap.

#### Helpful Terms

Data Collection Instrument - a form or survey created for capturing data

Record ID - a unique identifier for each record in your database

Record Status Dashboard – a table that lists all existing records and their status for every data collection instrument

Data Dictionary - a spreadsheet containing the data entry fields for your project

Variable – the name of the field or answer choice that is stored in the database

## Create a New REDCap Project

Once logged into REDCap, click on the Create New Project tab:

## NOTE: If you do not see the "Create New Project" tab, go to <u>www.seton.net/redcap/quick-start-guide</u> and follow the instructions for gaining access to Create New Projects.



Project Title Enter a title for your project

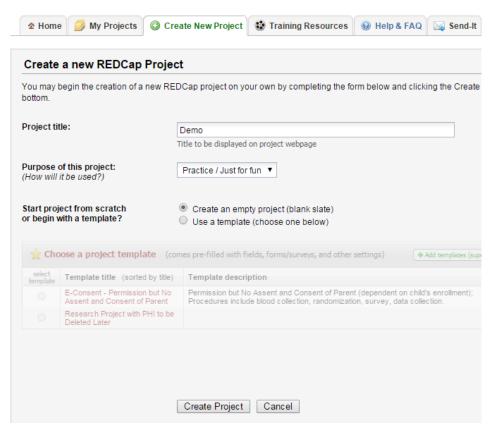
• This can be changed later, if needed

Purpose of this project Use the drop down and select the purpose

- **Practice/Just for Fun** use this if you are creating a practice project
- **Operational Support** use this for tracking specific department information processes
- **Research** if this is an IRB approved project, you must enter your PI information, your IRB # and specify the type of research you are doing
- Quality use this for any projects that help with goals and performance improvement
- Other if you choose this option, please specify the purpose

Start project from scratch or begin with a template: until you become familiar with REDCap, select "Create an empty project (blank state)"

#### Once ready, click Create Project



## Project Setup

## Main project settings

Select your data collection type:

**Use longitudinal data collection with repeating forms:** Click Enable if your project will contain instruments that will be used to collect data numerous times. For an example, you are going to collect lab results over ten visits for the same participant. This is considered an intermediate feature of REDCap and will be discussed in more detail in a later class.

Use surveys in this project: Click Enable if your project will contain surveys.

Modify project title, purpose, etc: Click this icon if you would like to change your project title or purpose.



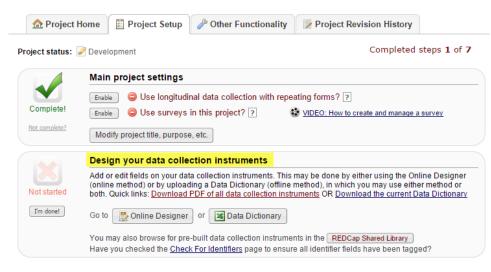
Once you are finished with your main project settings, click "I'm done!". This will serve as a visual check mark that this section is completed. **Note:** You can always go back and change your settings while in Development mode.

⚠ Project H	Home 🔋 Project Setup	🤌 Other Functionality	Project Revision History	
Project status:	🖉 Development		Completed	steps 1 of 7
	Main project settings			
	Enable 🥥 Use longitudi	nal data collection with repe	ating forms? ?	
Complete!	Enable 🔤 Use surveys	in this project? ?	VIDEO: How to create and manage a	survey
Not complete?	Modify project title, purpose	e, etc.		

#### Design your data collection instruments

Online Designer: Click Online Designer to start building your data collection instruments

**Data Dictionary:** Alternatively, you may upload your data dictionary via an Excel csv file in order to build your data collection instruments. **Note:** This is considered an advanced step and should not be used unless you are an experienced user.



## **Online Designer**

REDCap will begin your project with a data collection instrument titled "My First Instrument". To change the title, click the Rename icon.

To add additional data collection instruments, click on the Create icon. Click on Add Instrument here and enter a name for the new instrument.

To begin building your data collection instrument, click on the instrument name.

Project Setup	🗒 Online Designer	🗃 Data Dictionary	
	-		Solution 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.

D	ata Collection Instruments	Add new instrument: Create a new instrument from scratch Download a new instrument from the R	EDCap S	Shared	Library 🕑
	Instrument name		Fields	View PDF	Instrument actions
	My First Instrument		1	7	P Rename X Delete

#### **Record Identifier**

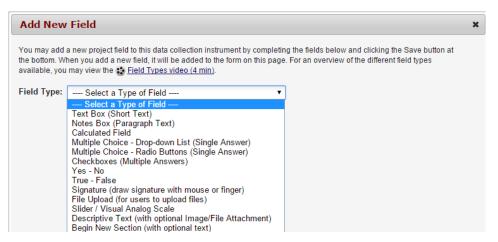
The very first field in the first data collection instrument must be used as the record identifier and must be <u>unique</u>. The record identifiers can be automatically sequentially-generated or user-entered. The record identifier field cannot be deleted however you may rename this field by clicking on the pencil icon.

A good example of a unique record identifier would be the patient's MRN. A bad example would be a participant's last name since there can be several individuals with the same last name (e.g. Smith, Jones, etc.).

	Project Setup	🛃 Online Designer	國 Data Dictionary		
					D: How to use this page
				elow using the Online Desigr	ner. Alternatively, you
ei O	ither using the Online De Inline Designer may help	signer or Upload Data Di	ctionary (see tabs above s/forms built quickly or to	or edit existing ones. Change e), in which you may use eithe make quick edits, but using the ject.	r method or both. The
e: th re	xisting ones. New fields r ne 🅜 Edit icon. If you de eorder the fields, simply d	may be added by clicking t cide that you do not want t	the Add Field buttons. Y to keep a field, you can s different position within t	s one field at a time. You may a ou can begin editing an existin imply delete it by clicking on th ne form below. NOTE: While in	g field by clicking on e 💥 Delete icon. To
	Return to list of	Data Collection Instru	uments		
С	Current instrument: De	emographics			Preview instrument
	Variable: record_id				
	Record ID				
	NOTE: The field above is	the record ID field and thus c	annot be deleted or moved	It can only be edited.	
			Add Field Add Matrix	of Fields	

## Add Fields to Your Data Collection Instruments

Click Add Field and select one of the several field types available:



Once you have selected your field type, you can then enter the following fields:

- Field Label: This is how you would format your question or data field
- Variable Name: This is the name of your Field Label that is stored in the database and can be used in reports, exports and analysis. The variable names may contain letters, numbers and underscores but no spaces or special characters. If you decided to change the name of a variable prior to moving your project into production, you must change it everywhere that it is being used such as calculations, branching logic, etc.
- Validation: The Field Type of Text Box (Short Text) will give you the opportunity to select a validation. If you would like to indicate how this field should be entered, use this drop down and select an option.
- Range Checks (Minimum and Maximum): Validation types of Date and Time, Integer and Number give you the ability to enter range checks.
- **Required:** Indicate if your field is going to be required. The default setting for all fields is set to No.
- Identifier: Indicate if your field is an identifier. All fields that could potentially identify a person should be marked as an identifier, regardless of who will be accessing your data.
- **Custom Alignment:** Select the alignment for your field. The default setting is Right/Vertical.
- Field Note: Use this field to enter any notes, reminders or instructions for your field.

Add New Field	×
You may add a new project field to this data collection instrument the bottom. When you add a new field, it will be added to the form available, you may view the state Field Types video (4 min). Field Type: Text Box (Short Text)	
Question Number (optional)         Displayed only on the survey page         Field Label         Image: Provide the survey page	Variable Name (utilized during data export) CNLY letters, numbers, and underscores UNLY letters, numbers, and underscore, numbers, and underscore, numbers, and underscore, numbers, and nu
	Validation? (optional) None
	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
	Looking for Branching Logic? Try clicking the ${\bf T}$ icon for this field after clicking the Save or Cancel button below.
	Save Cancel

## Examples of field types

## Text Box (Short Text)

This field can be used for text, dates, numbers, email addresses, phone numbers etc. Use the Validation drop down to restrict how data should be entered.

u may add a new project field to this data collection instrument by completing the fields below and clicking the Save button at 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 allable, you may view the Seried Types video (4 min).	Question Number (optional)
	Looking for Branching Logic? Try clicking the 🚏 icon for this field after clicking the Save or Cancel button below.
Looking for Branching Logic? Try clicking the 🍞 icon for this field a	clicking the Save or Cancel button below.

## Text Box (Short Text) with a validation of Date (M-D-Y)

I've set this field up with range checks (minimum and maximum fields). I've also made this field required and I've added a field note.

You may add a new project field to his data collection instrument by completing the fields below and clicking the Save but not a statistic. you write whe by Efficient break added 16 min.         Field Type:       Text Box (Short Text)         Field Label       Image: Statistic you write the get Efficient Statistic you write you w	Edit Field	×
Date of Visit: Today M-D-Y	You may add a new project field to this data collection instrument the bottom. When you add a new field, it will be added to the form available, you may view the 🏠 <u>Field Types video (4 min)</u> . Field Type: Text Box (Short Text) Field Label 🥢 How to use Piping	t by completing the fields below and clicking the Save button at to no this page. For an overview of the different field types Variable Name (utilized during data export)       Enable auto naming of or hole back         Visi_date       Enable auto naming of or hole back         ONL Y letters, numbers, and underscores       upon to Field Laber?         Validation? (optional)       Imaximum:         Date (M-D-Y)       Imaximum:         Minimum:       01-01-2015         Maximum:       12-31-2016         Required?*       No         Verified is blank         Identifier?       No         Does the field contain identifying information (e.g., name, 55N, address)?         Custom Alignment       Right / Vertical (RV)         Algn the poston of the field on the page         Field Note (optional)         Only dates between 2015-2016 are acccep         Small reminder text dipalayed underneath field         Looking for Branching Logic? Try clicking the \$\$" toon for this field after
ix iter		
'must provide value Only dates between 2015-2016 are accepted!	Date of Visit: ' must provide value	

## Text Box (Short Text) with a validation of Email

ield Type: Text Box (Short Text)	T
Question Number (optional) Displayed only on the survey page Field Label Field Label Finter your email address:	Variable Name (utilized during data export)       Enable auto naming of variable based upon its Field Label?         Validation? (optional)       Email         Email       ▼         Required?* ● No ● Yes       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       Looking for Branching Logic? Try clicking the <b>T</b> icon for this field after clicking the Save or Cancel button below.

## Text Box (Short Text) with a validation of Number (allows decimals)

Text Box (Short Text)	T
Question Number (optional)         Isplayed only on the survey page         ield Label         What is your weight (in kg):	Variable Name (utilized during data export) weight ONLY letters, numbers, and underscores Validation? (optional) Number Minimum: Maximum: Maximum: 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) v
	Align the position of the field on the page           Field Note (optional)           Small reminder text displayed underneath field
	Looking for Branching Logic? Try clicking the $\overline{{f v}}$ icon for this field after clicking the Save or Cancel button below.

## Text Box (Short Text) with a validation of Integer (a whole number)

valiable, you may view the 😵 <u>Field Types video (4 min)</u> .	•
isplayed only on the survey page	Variable Name (utilized during data export) age CNLY letters, numbers, and underscores upon its Field Label
What is your age:	Validation? (optional) Integer Minimum: Maximum:
	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
	Looking for Branching Logic? Try clicking the $\overline{\mathbf{v}}$ icon for this field after clicking the Save or Cancel button below.

What is your age:

## Notes Box (Paragraph Text)

Question Number (optional) Displayed only on the survey page Field Label // How to use Piping List all 31 flavors of ice cream that Baskin Robbins sells	Variable Name (utilized during data export)         flavors       off variable based         ONLY letters, numbers, and underscores       of variable based         Required?*
	Align the position of the field on the page          Field Note (optional)         Small reminder text displayed underneath field         Looking for Branching Logic? Try clicking the Try icon for this field after clicking the Save or Cancel button below.
	Save Cancel

Expand

## Calculated Field

This field can perform real-time calculations based on the data from other fields. For an example, you could create a calculation based off of the birth date field and visit date field in order to find out how old the participant was at the time of visit.

## Multiple Choice – Drop Down List (Single Answer)

This field will display your answer choices as a drop down list. When a field contains multiple answer choices, you must give each answer choice a variable name. If you do not, REDCap will automatically assign them for you.

	eld, it will be added to the form	t by completing the fields below and clicking the Save button at n on this page. For an overview of the different field types
	Drop-down List (Single Answ	ver) 🔻
Question Number (optional)         Displayed only on the survey page         Field Label         What is your favorite flavor of ic	How to use Piping	Variable Name (utilized during data export)  Variable Name (utilized during data export)  ONLY letters, numbers, and underscores  Required?*  No Yes
Choices (one choice per line)	The choices listed below so a raw value has been these auto generated va	thoices were added automatically w did not appear to have a raw value listed but only had a label, provided for them automatically. If you are not satisfied with alues, you may change them before saving your changes for this 'Choices' text box have automatically been modified to reflect
1, Chocolate 2, Strawberry 3, Vanilla 4, Butter Pecan 5, Mint Chocolate Chip		value for Strawberry
How de		Close

Add New Field	×
You may add a new project field to this data collection instrumen the bottom. When you add a new field, it will be added to the form available, you may view the state field Types video (4 min). Field Type: Multiple Choice - Drop-down List (Single Answ	n on this page. For an overview of the different field types
Question Number (optional)         Displayed only on the survey page         Field Label         What is your favorite flavor of ice-cream?	Variable Name (utilized during data export) favorite icecream ONLY letters, numbers, and underscores Enable auto naming of variable based upon its Field Label? 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
Choices (one choice per line) 1. Chocolate 2. Strawberry 3. Vanilla 4. Butter Pecan 5. Mint Chocolate Chip	Field Note (optional) Small reminder text displayed underneath field Looking for Branching Logic? Try clicking the 🐨 icon for this field after clicking the Save or Cancel button below.
How do I manually code the choices?	
	Save Cancel
What is your favorite flavor of ice-	cream?

## Multiple Choice – Radio Buttons (Single Answer)

This field will display your answer choices as radio buttons

Edit Field	×
You may add a new project field to this data collection instrument the bottom. When you add a new field, it will be added to the forn available, you may view the Steld Types video (4 min). Field Type: Multiple Choice - Radio Buttons (Single Answ Question Number (optional) Displayed only on the survey page Field Label Phone Monte Stellar What is your favorite flavor of ice-cream? What is your favorite flavor of ice-cream? Choices (one choice per line) 1. Chocolate 2. Strawberry 3. Vanilla 4. Butter Pecan 5. Mint Chocolate Chip How do I manually code the choices?	n on this page. For an overview of the different field types
	Save Cancel
What is your favorite flavor of ice-cream?	<ul> <li>Chocolate</li> <li>Strawberry</li> <li>Vanilla</li> <li>Butter Pecan</li> <li>Mint Chocolate Chip</li> </ul>

reset

## Checkboxes (Multiple Answers)

This field will display your answer choices as check boxes and will allow more than one answer. **Note:** I added a field note that states "Check all that apply".

Edit Field	×
You may add a new project field to this data collection instrument if he bottom. When you add a new field, it will be added to the form available, you may view the  Pield Type: Checkboxes (Multiple Answers)  Question Number (optional) Deplayed only on the survey page  Field Label	
	Save Cancel
What are your favorite flavors of ice-cream?	<ul> <li>Chocolate</li> <li>Strawberry</li> <li>Vanilla</li> <li>Butter Pecan</li> <li>Mint Chocolate Chip</li> <li>Check all that apply</li> </ul>

### Yes – No

This field will display Yes and No as radio button answer choices.

Edit Field	×
You may add a new project field to this data collection instrumen he bottom. When you add a new field, it will be added to the form available, you may view the the Field Types video (4 min). Field Type: Yes - No Question Number (optional) Deplayed only on the survey page Field Label	Variable Name (utilized during data export) Ilike_icecream ONLY letters, numbers, and underscores 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
Choices (not modifiable) 1, Yes 0, No	Field Note (optional) Small reminder text displayed underneath field Looking for Branching Logic? Try clicking the 🗊 icon for this field after clicking the Save or Cancel button below.
	Save Cancel
)o you like ice-cream?	◯ Yes ◯ No

reset

## True – False

This field will display True and False as radio button answer choices.

Edit Field	×	
You may add a new project field to this data collection instrument the bottom. When you add a new field, it will be added to the form available, you may view the string Field Types video (4 min). Field Type: True - False Question Number (optional) Displayed only on the survey page Field Label  How to use Piping You hate ice cream! Choices (not modifiable) 1, True 0, False	by completing the fields below and clicking the Save button at	
You hate ice cream!	clicking the Save or Cancel button below.  Save Cancel	
	False	reset

## Signature (draw signature with mouse or finger)

This field will allow the participant to add their signature using their mouse or the finger (if using a tablet or touch screen device)

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 Signature (draw signature with mouse or finger).
Question Number (optional)         Variable Name (utilized during data export)           Displayed only on the survey page         Enable auto naming
Signature         Enable auto naming of variable based           Pield Label         Phow to use Piping         ONLY letters, numbers, and underscores         upon its Field Label?
Sign your name:       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       Small reminder text displayed underneath field         Looking for Branching Logic? Try dicking the \$\$ icon for this field after dicking the Save or Cancel button below.       Field after
Save Cancel

## File Upload (for users to upload files)

## This field gives the participant the ability to upload a file or image

Edit Field	×	
You may add a new project field to this data collection instrument the bottom. When you add a new field, it will be added to the form available, you may view the Selection field Types video (4 min). Field Type: File Upload (for users to upload files)		
Question Number (optional)       Displayed only on the survey page       Field Label	Variable Name (utilized during data export) picture_eating_icecream ONLY letters, numbers, and undersoores ONLY letters, numbers, and undersoores	
Please upload a picture of you eating ice cream	Required?*   No  Yes * Prompt f 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 Looking for Branching Logic? Try dicking the 💱 icon for this field after clicking the Save or Cancel button below.	
	Save Cancel	
Please upload a picture of you eating ice	cream	O Upload docum

## Slider Visual Analog Scale

This field gives you a scale with three answer choices. If you select "Display number value (0-100)", it will code the answer given.

You may add a new project field to this data collection instrument by completing the fields below and clicking the Save button at the different field types valuable; you may we we the Seled Types video (4 min):         Field Type:       Sider / Visual Analog Scale         Oursplayed advow the sarvey page       Variable Name (utiliced during data export)         Field Label       Ptow to use Point         Now often do you eat ice cream?       Variable Name, (utiliced during fields below         Labels displayed above silder:       Required? No Yes         Midde label (ff any):       Atleast Once a Verei)         Field Label       Field Note (optional)         Signty-main dabel (ff any):       Atleast Once a Verei)         Signty-main label (ff any):       Atleast Once a Werei         <	Edit Field	×	
Labels displayed above slider:         Left-hand label (if any):       Atleast Once a Year         Middle label (if any):       Atleast Once a Mont         Right-hand label (if any):       Atleast Once a Weei         Display number value (0-100)?       Image: Cancel Save Cancel	the bottom. When you add a new field, it will be added to the available, you may view the selection field Types video (4 min). Field Type: Slider / Visual Analog Scale Question Number (optional) Displayed only on the survey page Field Label / How to use Pipin	torm on this page. For an overview of the different field types      Variable Name (utilized during data export)     how_often_eat_icecream     ONLY letters, numbers, and underscores     Upon its Field Label?      Required?*      No      Yes     * Prompt if field is blank      Identifier?      No      Yes	
	Left-hand label (if any):     Atleast Once a Ye       Middle label (if any):     Atleast Once a Me       Right-hand label (if any):     Atleast Once a We	Align the position of the field on the page Field Note (optional) ar Small reminder text displayed underneath field Looking for Branching Logic? Try clicking the Try icon for this field after	
			 Atleast Once a

## Descriptive Text (with optional Image/File Attachment)

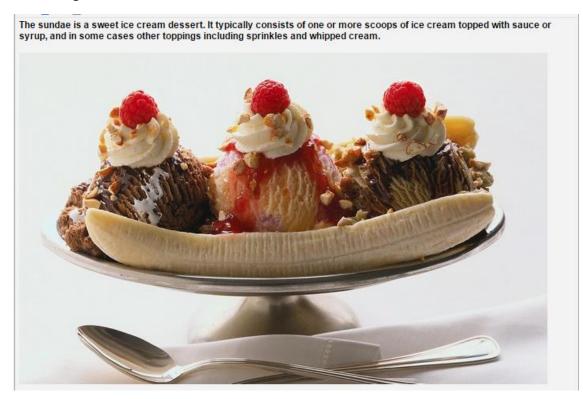
This field will allow you to add text such as instructions or additional information. It also gives you the option to add an image as a link or as an inline image.

You may add a new project field to this data collection instrumen he bottom. When you add a new field, it will be added to the forn available, you may view the 🎲 <u>Field Types video (4 min)</u> .	
Field Type: Descriptive Text (with optional Image/File Atta	achment) 🔻
Question Number (optional)           Displayed only on the survey page           Field Label	Variable Name (utilized during data export) sundae image ONLY letters, numbers, and underscores ONLY letters, numbers, and underscores
The sundae is a sweet ice cream dessert. It typically consists of one or more scoops of ice cream topped with sauce or syrup, and in some cases other toppings including sprinkles and whipped cream.	Attach an image or file (optional) wallpaper-ice-cream-sundae.jpg [X] Remove If attachment is an image file, display as inline image or as link on page? Link Inline image (Images wider than 600 pixels will be downsized to fit page.)
	Looking for Branching Logic? Try clicking the $\overline{v}$ icon for this field after clicking the Save or Cancel button below.

#### Link:



#### Inline Image:



#### Begin New Section (with optional text)

This field is used as a section header. You can add text or leave blank.

Edit Field	d						×
the bottom. W		w field, it will be	lection instrument added to the form <u>eo (4 min)</u> .				
Field Type:	Begin New Se	ction (with optio	onal text)	۲			
Field Label		🖋 <u>Ho</u> r	w to use Piping				
Demograph	ic Information						
						Save	Cancel
Vith op	otional te	xt:				Save	Cancel
	otional te					Save	
	nic Information					Save	

## Add Matrix of Fields

If you have a group of questions that all have the same answer choices, you can create a Matrix of Fields. Instead of clicking Add Field, you would click Add Matrix of Fields. You would add an optional header, your field labels and variable names, indicate which fields are required, add your answer choices and select whether these fields should be a single answer (radio button) or multiple answers (checkboxes). If you would like only one answer choice to be selected per column, enable ranking. You must also give your matrix a group name.

g Edit Matrix of Fields			×						
ou may add or edit a matrix (i.e. grid) of project fields on this d Il necessary info below and clicking Save, the new matrix of fia me must be provide for each field in the matrix, and you must Single Answer vs. Multiple Answers) for the entire matrix. <u>View</u>	elds will be added to the form on this p also set the Choices (i.e. matrix colu	age. A Field Label and Varial mn headers) and answer forn	le						
Matrix Header Text (optional) *Note: Adding section header	r text here will start a new page on the survey	ı.							
How often do you eat the following flavors of ice cream?									
Matrix Rows Each row represents a different field with its own label and variable name. Field Label	Enable auto namin Variable Name ONLY letters, numbers, and underscores	g of variable based upon its Field Labe Question Number (optional) Required?*		en do you eat the following f	avore of ico croam?				
Chocolate	choc			en do you eat the following f	avors of ice creatil?				
Strawberry	straw		77 🚥	Variable: choc					
Vanilla	van				Never	Rarely	Sometimes	Often	Always
Butter Pecan	butpec		Chocol	ate	$\odot$	$\bigcirc$	$\bigcirc$	$\bigcirc$	$\bigcirc$
Mint Chocolate Chip	mintcc								res
Add another row			77 🐨	Variable: straw		-	-	-	
Matrix Column Choices	Other Matrix Info		Strawb	erry	$\bigcirc$	$\odot$	$\bigcirc$	$\bigcirc$	O res
	Answer Format:		<b>T</b>	Variable: van					162
Choices (one choice per line) 1. Never 2. Rarely 3. Sometimes	Answer Format: Single Answer (Radio Buttons) Ranking: What is a ranked n		Vanilla	variatore, vari	0	0	0	0	) res
4, Often 5, Always	Allow only 1 choice to be selected pe	r column (radio buttons only)	<b>T</b>	Variable: butpec					
	Matrix group name: ONLY letters,	numbers, and underscores at is a matrix group name?	Butter	Pecan	0	0	0	0	O
	icecream matrix Wh	acis a matrix group name?							
How do I manually code the choices?	icecream matrix Wh	at is a matrix group name?		Variable: mintoo					re
How do I manually code the choices?	icecream matrix Wh	Save Cancel	<b>T</b>	Variable: mintco	0	0	0	0	re

## Edit/Copy/Move/Delete a Field

Edit: To edit a field, click on the	pencil ico	n 🥖					
Copy: To copy a field, click on the double paper icon 🕒							
Move: To move a field, click on the paper with pointer icon							
	ine puper	with poi		200			
<b>Delete:</b> To delete a field, click or							

# How often do you eat ice cream?

## Add Branching Logic

Branching logic is used when you have a field/question that you would only like to appear when a specific answer is given. To enable branching logic, click on the double green arrows on the field you want to hide.

For an example, I only want the "If Other, please specify" field to show if the answer to the question above it was Other.

What is your favorite kind of ice cream?	<ul> <li>Chocolate</li> <li>Strawberry</li> <li>Vanilla</li> <li>Other</li> </ul>
🥜 🛅 🐨 🚰 🗶 Variable: other_text	
If other, please specify	

After clicking on the double green arrows, scroll through the list of field choices and drag and drop the field you want to base your branching logic on. Click Save once finished.

27) A	dd/Edit Branching Logic			>
only b Advan fashio	ing Logic may be employed when fields/questions need e visible if the conditions provided are true (i.e. show th ced Branching Logic Syntax or by choosing the Drag-N-D n by simply dragging over the options you want. You ma nee the advanced logic allows for greater complexity, it ex.	eld only if). You may specify Logic Builder method, which al witch back and forth between e	those conditions in the text box below for the sllows you to build your logic in a much easier each method if you wish, but please be aware	
Cho	ose method below for the following field:	ther_text - If other, pleas	e specify	
$\bigcirc$	Advanced Branching Logic Syntax	(How do I use the adva	anced syntax?)	
	Show the field ONLY if			
- OF	Drag-N-Drop Logic Builder			
- OF		collection instrument:		
- OF	Drag-N-Drop Logic Builder Displaying field choices for the following dat	Show the	e field ONLY if	
- OF	Drag-N-Drop Logic Builder Displaying field choices for the following dat Form 1 Set Up As A Survey ▼ Field choices from other fields	Show the	below are true	
- OF	Drag-N-Drop Logic Builder Displaying field choices for the following dat Form 1 Set Up As A Survey ▼ Field choices from other fields (drag a choice below to box on right)	Show the		
• OF	Drag-N-Drop Logic Builder Displaying field choices for the following dat Form 1 Set Up As A Survey ▼ Field choices from other fields (drag a choice below to box on right) fav_icecream = Chocolate (1)	Show the ● ALL t ● ANY	below are true below are true	
- OF	Drag-N-Drop Logic Builder Displaying field choices for the following dat 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)	Show the and Any cceream =	below are true	
- OF	Drag-N-Drop Logic Builder Displaying field choices for the following dat 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 = trawberry (2) fav_icecream = Vanilla (3)	Show the ● ALL t ● ANY	below are true below are true	
- OF ●	Drag-N-Drop Logic Builder Displaying field choices for the following dat 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)	Show the a ALL t ANY icecream = Drag	below are true below are true	
● OF	Drag-N-Drop Logic Builder Displaying field choices for the following dat 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 = Other (4)	Show the Show the ALL to ANY icecream = and	below are true below are true	
● OF	Drag-N-Drop Logic Builder Displaying field choices for the following dat 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 = Chocolate (1) icecream = Chocolate (1)	Show the Show the ALL b ANY icecream = and Drop	below are true below are true	
<ul> <li>− OF</li> <li> </li> </ul>	Drag-N-Drop Logic Builder Displaying field choices for the following dat 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 = Other (4) icecream = Chocolate (1) icecream = Strawberry (2)	Show the Show the ALL b ANY icecream = and Drop	below are true below are true	
- OF	Drag-N-Drop Logic Builder Displaying field choices for the following dat 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 = Other (4) icecream = Other (4) icecream = Strawberry (2) icecream = Vanilla (3)	Show the Show the ALL b ANY icecream = and Drop	below are true below are true = Other (4)	
● OF	Drag-N-Drop Logic Builder Displaying field choices for the following dat 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 = Vanilla (3) fav_icecream = Other (4) icecream = Vanilla (3) icecream = Other (4)	Show the Show the ALL b ANY icecream = and Drop	below are true below are true	qic
● OF	Drag-N-Drop Logic Builder Displaying field choices for the following dat 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 = Vanilla (3) fav_icecream = Other (4) icecream = Vanilla (3) icecream = Other (4)	Show the Show the ALL b ANY icecream = and Drop	below are true below are true = Other (4)	qic
• •	Drag-N-Drop Logic Builder Displaying field choices for the following dat 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 = Vanilla (3) fav_icecream = Other (4) icecream = Vanilla (3) icecream = Other (4)	Show the Show the ALL b ANY icecream = and Drop	below are true below are true = Other (4)	gic
- OF	Drag-N-Drop Logic Builder Displaying field choices for the following dat 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 = Vanilla (3) fav_icecream = Other (4) icecream = Vanilla (3) icecream = Other (4)	Show the Show the ALL b ANY icecream = and Drop	below are true below are true = Other (4)	_

The field now alerts me that branching logic exists. If I want to view or modify the existing branching logic, I would click on the double green arrows.

🥒 🛅 🐨 🖆 🗶	Variable: other_text	[Branching logic exists]	
If other, please spec	ify		

## Add Piping Logic

Piping gives you the ability to insert answers and place it in various places within REDCap.

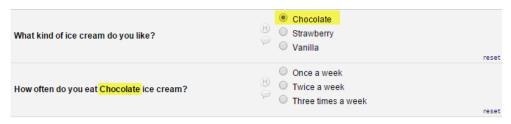
For an example, I have a field that asks the participant "What kind of ice cream do you like?". I then have another field that asks the participant "How often do you eat \_\_\_\_\_ ice cream?". I have added piping logic in my second question so that it will insert the answer from the first question.

#### **Before:**

What kind of ice cream do you like?	H P	Chocolate Strawberry Vanilla	eset
How often do you eat ice cream?	H P	Once a week ○ Twice a week ○ Three times a week	eset

One the participant answers the first question; the answer is then inserted into my next question.

#### After:



To add piping, all you have to do is add the variable name of the field you want to pipe in. The variable name must be inserted into square brackets [].

	Add Field Add Matrix of Fields		
🖉 🛅 🐨 付 🚳 🗶 Verieble: ice_cream		Edit Field	×
What kind of ice cream do you like?	<ul> <li>Chocolate</li> <li>Strawberry</li> <li>Vanilla</li> </ul>	You may add a new project field to this data collection instrumen the bottom. When you add a new field, it will be added to the forr available, you may view the state field Types video (4 min)	
	Add Field Add Matrix of Fields	Field Type: Multiple Choice - Radio Buttons (Single Answ	ver) 🔻
The second	Conce a week Trice a week Trice a week Trice a week Trice a week Add Felt Add Matty of Pelts	Cuestion Number (optional) Dealer and the same page  Pied Labe How often do you eat [ice_cream] ice cream?  How often do you eat [ice_cream] ice cream?  Choices (one choice per line) 2. Twice a week 3. Three times a week	Variable Name (utilized during data export) Iscream often OTL Vietnes, Runde undersones OTL Vietnes, Rundersones OTL Vietnes, Rundersones Required? No Ves Prompt field is laberk Indentifier? No Ves Cost of field costan identifying information (s.g., name, 558, address)? Custom Alignment Right / Vertical (RV) Age the position of the field on the page Field Note (optional) Small reminder that displayed undersmath field Looking of Personical Lución (SV), Vietnes (SV), vietnes field after Cicking the Save or Cancel button below.
			Save Cancel

Piping can be used in many different places in REDCap such as:

- Field Labels
- Field Notes
- Section Headers
- Survey Instructions & Survey Acknowledgement Text

## Enable Your Instrument as a Survey

Once you have enabled the "Use surveys in this project" setting under Project Setup, you will want to indicate which data collection instruments are going to be used as surveys.

🏫 Project	t Home	📓 Project Setup	🥜 Other Functional	ity 📄 📝 Pr	oject Revision History	
Project status:	🖉 Devel	opment			Completed	steps 1 of 7
	Mair	n project settings				
	Enab	🗉 🥥 Use longitudi	inal data collection with	repeating for	ms? ?	
Complete!	Disab	le 🥑 Use surveys	in this project? ?		: How to create and manage a	survey
Not complete?	Mod	dify project title, purpos	e, etc.			

Under Online Designer, click Enable next to the data collection instrument you want to use as a survey.

Data Collection Instruments       Survey options:         Image: Survey Queue       Image: Survey Login         Image: Survey Queue       Image: Survey Collections			n (	Add new instrument:		
Instrument name		Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Demographics		9	7	Enable	P Rename Relete	

## Survey Settings

Once you enable your data collection instrument as a survey, the "Set up my Survey" page will appear.

#### Survey Design Options

Survey Title: Enter a survey title. It does not have to be the same name as your form.

Logo: Click Choose File and add a logo. If you add a logo, you have the option of hiding the survey title.

**Survey Instructions:** Enter any instructions you wish to give to the participant. The default instructions are "Please complete the survey below. Thank You!"

Set up my survey for data collection	instrument "Demographics"	Cancel
Survey Design Options:		
Survey Title	Demographics Title to be displayed to participants at the top of the survey page	
Logo (Optional: display an image above the survey title)	Add new logo: Choose File No file chosen (Images wider than 600 pixels will be downsized to fit page.) If using a logo, hide survey title on survey page?	
Survey Instructions (Displayed at top of survey after title)	<strong>Please complete the survey below.</strong> Thank you!	
	How to use Piping here	

#### Survey Customizations

Question Numbering: REDCap can auto number your questions for you or you may custom number your questions.

#### **Question Display Format –**

All on one page: Select this if you would like all of your questions placed on one page.

**One section per page (multiple pages):** Select this option if you would like to like to break your survey up into sections by your section headers (the yellow banner bars). If you select this option, you can display the page numbers at the top of the survey page.

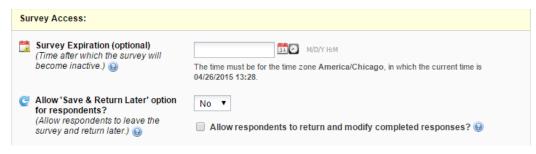
Allow survey respondents to view aggregate survey results after completing the survey: The default setting is disabled. Otherwise you may choose to display Graphical Plots, Descriptive Statistics or both plots and statistics. If you enable this setting, you can choose the minimum number of responses before participants are allowed to view the aggregate data.

Survey Customizations:	
Question Numbering	Auto numbered 🔹
Question Display Format (One page or multiple pages?)	One section per page (multiple pages) ▼
	Display page numbers at top of survey page
Allow survey respondents to view aggregate survey results after completing the survey?	Disabled <b>v</b>
After completing the survey, participants can view	Additional settings:
ALL responses in aggregate graphical format and/or as descriptive statistics. Also, the individual respondent's answers will be	10 Minimum number of responses required before participants are allowed to view aggregate data (recommended = 10).
highlighted in the results.	Do not show plots for questions lacking diversity in response values? (What does this mean?)

#### Survey Access

Survey Expiration (optional): You may enter a date/time you would like for your survey to expire.

Allow 'Save & Return Later' option for respondents: You may enable this option if you would like your participants to be able to come back and finish taking their survey. If enabled, the participant will receive a generated code they must enter in order to continue. You may also indicate if you would like your participants to be able to return and modify their completed responses.



#### Survey Termination Options

**Redirect to a URL:** If you would like the participant to be redirected to another URL after they have completed their survey, enter the full URL.

**Survey Acknowledgement Text:** Enter any text you wish to display after the participant has finished taking your survey. The default text is "Thank you for taking the survey. Have a nice day!"

Survey Termination Options:	
Redirect to a URL     (Redirect to a webpage when survey     is completed)     — OR —	Provide a full URL, e.g. http://www.example.com/mypage.html
<ul> <li>Survey Acknowledgement Text (Displayed after survey is completed)</li> </ul>	<strong>Thank you for taking the survey.</strong> <phave a="" day!<="" nice="" p=""></phave>
	Save Changes

## Public Survey Link

Using a public survey link is the simplest and fastest way to collect responses for your survey. Responses are collected anonymously. To set up the public survey link, you must make your first instrument a survey.

Project Home     Project Setup     Project status: Development	👫 Manage Survey Participants	
Data Collection 🥒 Edit instruments		
Get a public survey Participants - Get a public survey link or build a participant list for inviting respondents	@ Public Survey Link Servey Invitation Log	
Record Status Dashboard     - View data collection status of all records     Add / Edit Records     - Create new records or edit/view existing ones	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 identifying data from the participant). <b>NOTE:</b> 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.	
Data Collection Instruments:	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 e recipient(s) can then click the link to begin taking your survey. Get embed code to place link on a webpage.	mail
My First Instrument Test1	Public Survey URL: https://cmhredcap.cmh.edu/surveys/?s=LDPCRE9DK3	
Applications	Popen public survey Send me URL via email 🔗 Survey Access Code or 🎇 QR Code	

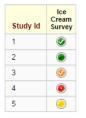
## Record Status Dashboard

This is a table that lists all existing records/responses and the status for every data collection instrument. You may click on one of the icons in order to open the data collection instrument for a specific record.

#### 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 tablwindow 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
Displaying record "1" through "5" V of 5 records	





## Enable Optional Modules and Customizations

## Auto-numbering for records

If the first form in your project is a survey, auto-numbering will automatically be enabled. Otherwise if you would like REDCap to generate a new unique record name, you may enable this feature manually.

	Enable optional modules and customizations	
	Enable Auto-numbering for records ?	
Optional	Enable Scheduling module (longitudinal only) ?	
	Enable 🤤 Randomization module ?	
I'm done!	Enable 🕒 Designate an email field to use for invitations to survey participants ?	
	Additional customizations	

## Display the Today/Now button for all date and time fields on forms/surveys

If you do not wish to have the Today icon appear next to your date fields, you may turn this setting off by clicking on Additional Customizations. Uncheck the box next to "Display the Today/Now button for all date and time fields on forms/surveys".

In progress I'm done!	Design your data collection Add or edit fields on your data coll (online method) or by uploading a both. Quick links: <u>Download PDF c</u> Go to Collection or or You may also browse for pre-built Have you checked the <u>Check For I</u>	۲	issues with data in the project (i.e. opening, responding to, and closing data queries). <u>View more details</u> Enable: Field CommentLog  ■ Allow users to edit or delete Field Comments (excludes Data Resolution Workflow comments)?   (H) Enable the Data History widget for all data collection instruments? If enabled, an icon will appear next to every field on a data collection instruments? If enabled, an icon will appear next to every field on a data collection instruments? If enabled, who changed the value at each instance, and the time it was changed.
	Enable optional modules an Enable © Auto-numbering for		Display the Today/Now button for all date and time fields on forms/surveys? If enabled, a Today button will be displayed to the right of all date fields, and a Now button will be displayed to the right of all time, datetime, and datetime_seconds fields. Clicking the button will automatically set the field's value with the current date or time.
Optional I'm done!	Enable Scheduling module Enable Randomization mod Enable Designate an email Additional customizations		Require a 'reason' when making changes to existing records? Require users to enter a reason (200 character max) in a text box when making any data changes to an already existing record on a data collection instrument. The prompt is triggered when clicking the Save button on the page. Any 'reasons' entered can then be viewed anytime afterward on the Logging page.

## Applications

## Data Exports, Reports and Stats

This will allow you to easily view reports of your data as well as export your data to Microsoft Excel, SAS, Stata, R or SPSS for analysis. If you wish to export your \*entire\* data set or view it as a report, then Report A is the best and quickest way. If you want to view or export data from only specific instruments (or events) on the fly, then Report B is the best choice.

Data E	Exports, Reports	, and Stats	VIDEO: How to use Data Exports, I	Reports, and Stats	
<b>+</b> C	Create New Report	Reports & Exports	PDF & Other Export Options		
Excel, S/ is the be: choice. Y events u: webpage	AS, Stata, R, or SPSS fi st and quickest way. H /ou may also create yo sing a vast array of filte	or analysis (if you have such pr owever, if you want to view or e ur own custom reports below (i ring tools to make sure you get	pect plots and descriptive statistics of your data, as well as ivileges). If you wish to export your *entire* data set or viev xport data from only specific instruments (or events) on the fyou have such privileges) in which you can filter the report the exact data you want. Once you have created a report, SAS, Stata, SPSS, R), or view the plots and descriptive st	v it as a report, then Report A e fly, then Report B is the best rt to specific fields, records, or you may view it as a	
	Report name	v	iew/Export Options	Management Options	Report ID 🥹 (auto-generated)
4	All data (all recor	ds and fields)	View Report Export Data		
E	Selected instrum	eents (all records)	☆ Make custom selections		
	+ Create New Re	port			

You may also create your own custom reports 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.

Manua	Dements	List of Participants Who Like Obs		lata la		10.0m		
Name of	кероп:	List of Participants Who Like Cho		nate ic	e C	ream		
STEP 1								
		and the second size of the income of						
<ul> <li>All user</li> </ul>		<ul> <li>Oose who can view this report</li> <li>Custom user access (Choose speci</li> </ul>	fic 1	eere rol	lee or	data accese groupe i	udo will have access)	
() All user	<b>0</b>			19619,10		data access groups t		
STEP 2								
🚳 Fields	to include	e in report		Add all	fields	from selected instrum	ent: choose instrument	
Field 1		record_id "Study Id"	۲	RBI		nstrument: Form 1 Se	t Up As A Survey	×
Field 2		mc_dropdown "Multiple Choice (Drop Dow	•	ABI	1	nstrument: Form 1 Se	t Up As A Survey	×
Field 3		select a field	۲	ABI	1	nstrument:		
📎 Additic	onal fields	to include in report (optional)						
	the current i	dentifier field and survey timestamp field(s)?						
	ule sulvey i	denuier liefd and survey unestamp liefd(s)?						
STEP 3							How to use filters and AND.	OR logic
Tilters	(optional)					Operator / Value	e	
-	Filter 1	mc_dropdown "Multiple Choice (Drop Dow	۲	ABI		= •	Chocolate <b>T</b>	×
	AND 🔻							
	Filter 2	select a field	Ŧ	ABI		= •		
~								
Switch f	ormat: Use	advanced logic						
STEP 4								
🛃 Order t	he Result	s (optional)						
First by		record_id "Study Id"	Ŧ	ABI		Ascending order	¥	
Then by		Type variable name or field label				Ascending order	•	
Then by		Type variable name or field label				Ascending order	¥	
		Save Re	ро	rt	Can	cel		

## Logging

This will list the date and time and user that made changes made to the project. This includes data exports, data changes and the creating or deletion of users. **Note:** It does not give you the details of the changes made.

Logging			Download entire logging record to Microsoft Excel (CS)
is module lists all changes	s made to this proje	ct, including data expo	rts, data changes, and the creation or deletion of users.
Filte	r by event: All ev	ent types (excluding)	page views) 🔻
Filter by i	user name: All us	ers T	
· · · · · · · · · · · · · · · · · · ·	by record: All re		
	· ·		
Displaying events (by mo	ost recent): 1 - 28		
Time / Date	Username	Action	List of Data Changes OR Fields Exported
04/26/2015 2:38pm	jahoitenga	Created Record 2	<pre>visit_date = '2015-04-27', daily_medication_list = Tylenol', email_address = 'wcteachout@cmh.edu', county(3) = checked, diabetes_indicator = '0', diabetes_ind' = '0', participant_signature = '16975', signed_conset_form = '16976', demographics_complete = '2', record_id = '2'</pre>
04/26/2015 2:38pm	[survey respondent]	Created Response	<pre>visit_date = '2015-04-26', daily_medicaton_list = 'None', email_address = 'jahoitenga@cmh.edu', county(1) = checked, diabetes_indicator = '0', diabetes_indicator = '0', diabetes_indicator = '16973', signed_conset_form = '16974', record_id = 1', demographic_complete = '2'</pre>
04/26/2015 2:37pm	jahoitenga	Manage/Design	Set up survey
04/26/2015 2:36pm	jahoitenga	Manage/Design	Modify project settings
04/26/2015 2:29pm	jahoitenga	Manage/Design	Modify project settings
04/26/2015 1:26pm	jahoitenga	Manage/Design	Modify project settings
04/25/2015 1:47pm	jahoitenga	Manage/Design	Create project field
04/25/2015 1:45pm	jahoitenga	Manage/Design	Reorder project fields
04/25/2015 1:45pm	jahoitenga	Manage/Design	Create project field
04/25/2015 1:23pm	jahoitenga	Manage/Design	Create project field
04/25/2015 1:21pm	jahoitenga	Manage/Design	Create project field
04/25/2015 1:12pm	jahoitenga	Manage/Design	Edit project field

## User Rights and Permissions

If you would like to grant other users access to your project, click on User Rights and DAGs.

My Projects Project Home	General Testing I	
Project Setup Project status: Development		
Data Collection / Edit instruments		Service Setup
Manage Survey Participants - Get a public survey link or build a participant list for inviting respondents Becord Status Dashboard - View data collection status of all records Med / Edit Records - Oreate new records or edit/view existing ones	Project Home Project status: Develc      Main Disable Disable Disable Disable Disable	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.
Applications	I'm done!	
Calendar Data Exports, Reports, and Stats	Mod	Add new users: Give them custom user rights or assign them to a role.
Data Import Tool	Desig	Add new user Add with custom rights
Data Comparison Tool Logging Field Comment Log	Add or Online either Quick	— OR — Assign new user Assign to role ♥
File Repositive Strain Provide Action Provided Action Provi	Go to	Create new roles: Add new user roles to which users may be assigned.
Record Locking Customization E-signature and Locking Mgmt Data Quality	You m Have t	Enter new role name (e.g., Project Manager, Data Entry Person) Create role

Enter the person's last name in the Add new user field. If the person is found, click on their name and then click on Add with custom rights.

If the person is not found, this simply means they have not set up their REDCap user profile. If they are a Seton employee, you can add them to your project by entering their Seton Network username. You cannot add them by their email

## address.

#### Correct way: wsmith Incorrect way: wsmith@seton.org

Once you click Add with custom rights, you will now choose what you want the user to have access to. Select the appropriate rights and then click Add User.

Basic Rights		Data Entry Rights				
Expiration Date (if applicable)	(M/D/Y)	NOTE: The data entry ability to view or edit d (e.g., data entry forms data imports or data e	lata on a 5, report	web p	age in F	REDCap
lighest level privileges:			No Access	Read Only	View & Edit	Edit surve
Project Design and Setup		From 1 Cabilly As A	Access	Uniy	or Edit	responses
S User Rights		Form 1 Set Up As A Survey (survey)	0	$\bigcirc$	۲	
Sata Access Groups		Formatting Fun (survey)	0	$\bigcirc$	۲	
Privileges for data exports (including eports, and stats:	PDFs and API exports),	New User Notificatio	n			
Data Exports	No Access	🖂 Notify user of their p	project a	ccess v	ia email	? 🕑
* De-identified means that all free-form text fields will be removed, as well as any date/time fields and Identifier fields.	<ul> <li>De-Identified*</li> <li>Remove all tagged Identifier fields</li> </ul>					
Add / Edit Reports	<ul> <li>Full Data Set</li> <li>✓</li> </ul>					
Add / Edit Reports						
Add / Edit Reports Also allows user to view ALL reports (but not necessarily all data in the reports) Stats & Charts						
Add / Edit Reports Also allows user to view ALL reports (but not necessarily all data in the reports)						
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Add / Edit Reports Also allows user to view ALL reports (but not necessarily all data in the reports) Stats & Charts Other privileges: Common Manage Survey Participants	8					
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Add / Edit Reports Also allows user to view ALL reports (but not necessarily all data in the reports) Stats & Charts Stats & Charts Stats & Charts Stats & Charts Calendar Calendar Data Import Tool Data Comparison Tool Logging File Repository	× ×					

Add user Cancel

## Set Up Project Bookmarks

You can create custom bookmarks to webpages that exist inside or outside of REDCap. Bookmarks will be seen as links on the left hand project menu and can be accessed by those who have access to your project.

## Test Your Project Thoroughly

It is extremely important to test your project before moving it into production!

Try creating a few test records and enter some data to ensure that your data collection instruments look and behave how you expect, especially branching logic and calculations. You can do this by clicking Add/Edit Records. If you have surveys, complete the surveys as if you were a participant by using the Public Survey Link.

Once you have some test records entered, review them by going to your Record Status Dashboard; create reports and export your data and view in Excel or one of the statistical analysis packages; review your Stats.

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.

## Move Your Project to Production

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.

You are strongly encouraged to test your project thoroughly before you move your project into Production. Once you have ensured your project is capturing all of the fields you need and has all of the design elements, click on the Move project to production icon.

For **Research** projects, your IRB must be in approved status and your REDCap data fields must match those approved in MARS.

## Additional Training/Support Resources

If you have questions or need project consulting, please feel free to email <u>redcap@seton.org</u>.

If you have questions or need additional help, we also hold weekly REDCap Office Hours. For more information on scheduling, please visit <u>www.seton.org/redcap/training</u>.