



REDCap the Basics

Presenter

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Relationship Manager

Vanderbilt REDCap Team

Housekeeping Notes...



Today's slides...

...and a link to the User Guide will be emailed to you after this training



Via a REDCap Survey!!

History/REDCap
Support Model

Today

Project Design

Adding Data

Viewing Data

Collaborating/
Safeguarding
Your Data



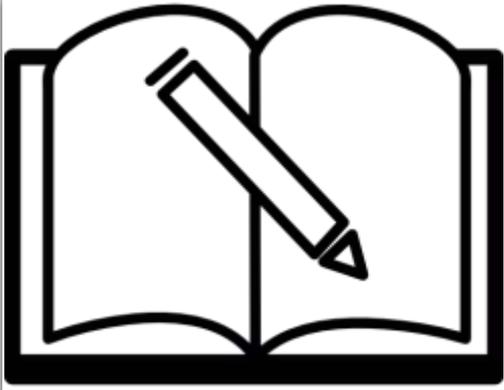
Different learning styles



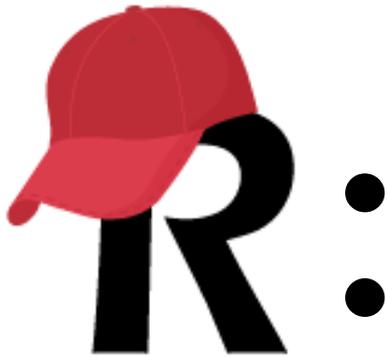
See

Hear

Do



History and Background



*A secure web
application for
managing your data
online*



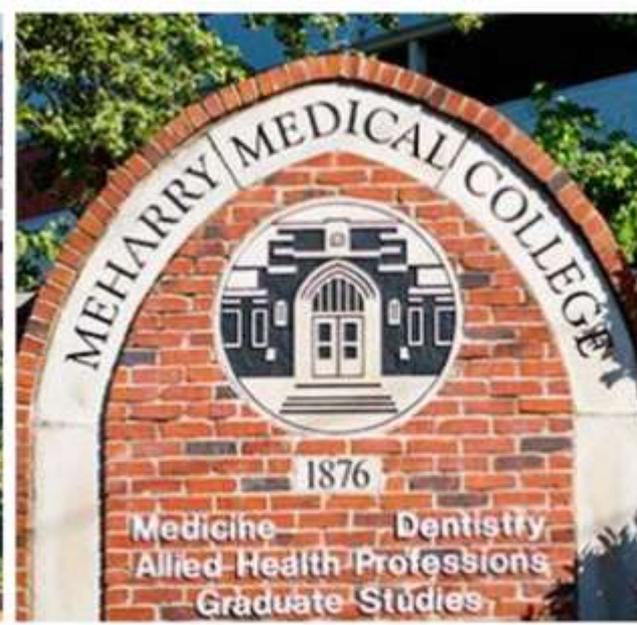
Est. 2004

VANDERBILT UNIVERSITY

- 29k end users
- 61k projects

- REDCap is licensed for free to non-profits around the world
- Currently over 3,400 REDCap installations worldwide





ADVANTAGES

Accessible

Customizable

Secure

Accurate

Free!



**What the
Vanderbilt Support Model
Means for You**



Free

REDCap at Vanderbilt



+

Generalized Support
Individualized Support

Instructional text



Main project settings

Disable

Use surveys in this project 

 [VIDEO: How to create and manage a survey.](#)

Enable

Use longitudinal data collection with defined events 

Modify project title, purpose, etc.

Help & FAQ/Training Videos



Home

My Projects

+ New Project

Help & FAQ

Training Videos

Send-It

Messenger

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 (UL1 TR000445 from NCATS/NIH).

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 Administrator](#).

REDCap User Guide

Adobe Acrobat Pro DC



Basic User Guide

For Vanderbilt/Meharry

end users

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Link to Resource page



Log In

VANDERBILT  UNIVERSITY

NEED HELP? Visit the following FAQ page for help with Vanderbilt/Meharry user accounts and other common issues:

<http://tinyurl.com/vandy-rc-faq>

Resource page for Vanderbilt/Meharry users

Vanderbilt/Meharry REDCap Users FAQ

How to use this page

Welcome to the Vanderbilt/Meharry REDCap user FAQ space.

Several pages are displayed to the right, in the "Vanderbilt/Meharry User FAQ Pages" section. You may access the frequently asked questions (FAQ) about each specific topic by clicking on the links in that section or by clicking on the topic category below.

The current content of these pages falls into the following categories:

- [Accessing REDCap](#): user access, login and account information, accessibility on mobile devices and offline
- [Project Development](#): getting started, system security, survey-specific features
- [Data Management](#): production mode, deleting and exporting data
- [e-Consent](#): electronic consent forms for human subjects research
- [Clinical Data Pull \(CDP\)](#): automated import from eStar data; formerly known as DDP on FHIR
- [Twilio Module](#): voice calling and text messaging services for surveys
- [External Modules](#): background about unofficial add-ons available in local REDCap projects
- [Help Resources](#)
- [User Guide](#)



Vanderbilt/Meharry User FAQ Pages:

[Vanderbilt/Meharry REDCap Users FAQ](#)
[Accessing REDCap](#)
[Project Development](#)
[Data Management](#)
[e-Consent](#)
[Clinical Data Pull from eStar \(DDP on FHIR\)](#)
[Twilio Module](#)
[External Modules](#)
[Help Resources](#)
[User Guide](#)



Powered by  VANDERBILT

Generalized Support - REDCap Trainings

- 
- 2 times/month on an ad hoc basis
 - Beginner
 - Intermediate/advanced

<https://is.gd/REDCapTrainings>

Individualized support - Email



redcap@Vanderbilt.edu



1-2

business days



Individualized support - REDCap Help Clinic

- 1st and 3rd Wednesdays
- 2nd and 4th Tuesdays

***Check the StarBRITE
Education Calendar**



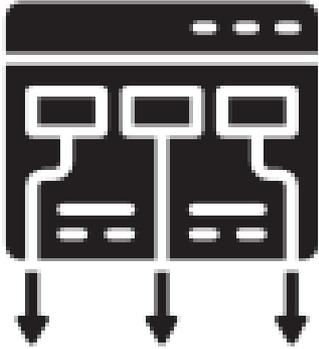
2525 West
End Ave



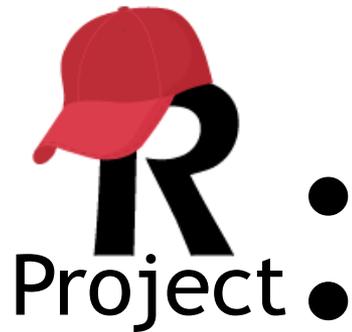
DataCore



Forms development, special programming and other services available on a fee-for-service basis. Email datacore@vumc.org for more info.



REDCap Framework



- The framework into which your data will be entered
- Contains tools to manage your data
- Contains an instrument

Instrument

Demographics

+ Adding new Study ID Test2

Study ID	Test2
Contact Information	
First Name	<input type="text"/>
Last Name	<input type="text"/>
Phone number	<input type="text"/> <small>Include Area Code</small>
E-mail	<input type="text"/>
Date of birth	<input type="text"/>  Y-M-D

?

?

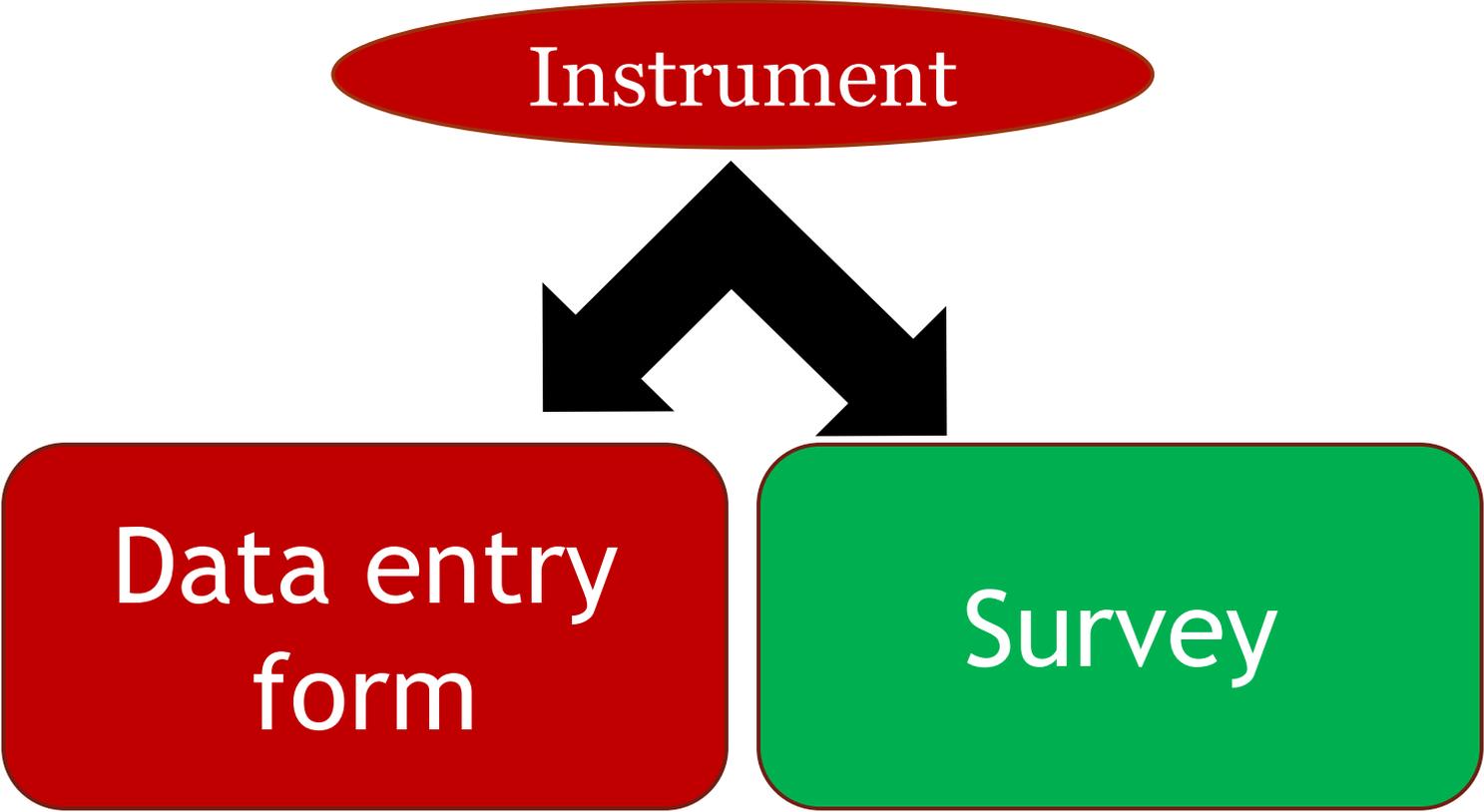
?

A

A

A

Instrument



```
graph TD; Instrument([Instrument]) --> DataEntryForm[Data entry form]; Instrument --> Survey[Survey];
```

Data entry
form

Survey

Data Entry Form - accessed by REDCap users

The screenshot displays the REDCap interface for a data entry form. On the left is a navigation sidebar with sections: 'Project Home and Design' (Project Home, Project Setup, Designer, Dictionary, Codebook, Project status: Development), 'Data Collection' (Survey Distribution Tools, Record Status Dashboard, Add / Edit Records, Record ID 84), and 'Applications' (Alerts & Notifications, Calendar, Data Exports, Reports, and Stats). The main area is titled 'Example Research Study' and shows 'Adding new Record ID 84'. It includes action buttons for 'Modify instrument' and 'Download PDF of instrument(s)', and a video link 'VIDEO: Basic data entry'. The form fields are: Record ID (84), Contact Information (First Name, Last Name, Phone number with 'Include Area Code' checkbox, E-mail), Date of birth (with a calendar icon and 'Y-M-D' label), Ethnicity (radio buttons for 'Hispanic or Latino', 'NOT Hispanic or Latino', 'Unknown / Not Reported'), Race (dropdown menu), Gender (radio buttons for 'Male', 'Female', 'non-binary'), and 'Has the patient given birth before?' (radio buttons for 'Yes', 'No'). A 'Screening information' section is partially visible at the bottom. On the right, there are three buttons: 'Save & Exit Form', 'Save & Stay', and 'Cancel'.

REDCap

Logged in as rc_fund | Log out

My Projects
REDCap Messenger

Project Home and Design

Project Home · Project Setup
Designer · Dictionary · Codebook
Project status: Development

Data Collection

Survey Distribution Tools
- Get a public survey link or build a participant list for inviting respondents

Record Status Dashboard
- View data collection status of all records

Add / Edit Records
- Create new records or edit/view existing ones

Record ID 84 [Select other record](#)

Data Collection Instruments:

Demographics

Baseline Data
Pain Management Survey - PRE
Intervention Data
Pain Management Survey - POST
Study Completion

Applications

Alerts & Notifications
Calendar
Data Exports, Reports, and Stats

Example Research Study

Actions: [Modify instrument](#) [Download PDF of instrument\(s\)](#) [VIDEO: Basic data entry](#)

Demographics

Adding new Record ID 84

Record ID 84

Contact Information

First Name

Last Name

Phone number Include Area Code

E-mail

Date of birth Y-M-D

Ethnicity Hispanic or Latino
 NOT Hispanic or Latino
 Unknown / Not Reported [reset](#)

Race

Gender Male
 Female
 non-binary [reset](#)

Has the patient given birth before? Yes
 No [reset](#)

Screening information

[Save & Exit Form](#)
[Save & Stay](#)
[Cancel](#)

Pain Management Survey - PRE

Please complete the survey below.

Thank you!

Are you in pain today?

Yes

No

reset

What do you think about these medication features?

	1 Not important to me	2	3 Neutral	4	5 Very important to me	
Pill size	<input type="radio"/>	reset				
Pill form (tablet, capsule, etc.)	<input type="radio"/>	reset				
How soon it takes effect	<input type="radio"/>	reset				
How long the effect lasts	<input type="radio"/>	reset				
How many times in a day I have to take it	<input type="radio"/>	reset				
Price	<input type="radio"/>	reset				

How has pain affected your life?

Expand

Submit

Save & Return Later

Survey -
completed
by a
participant

Record Home Page

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

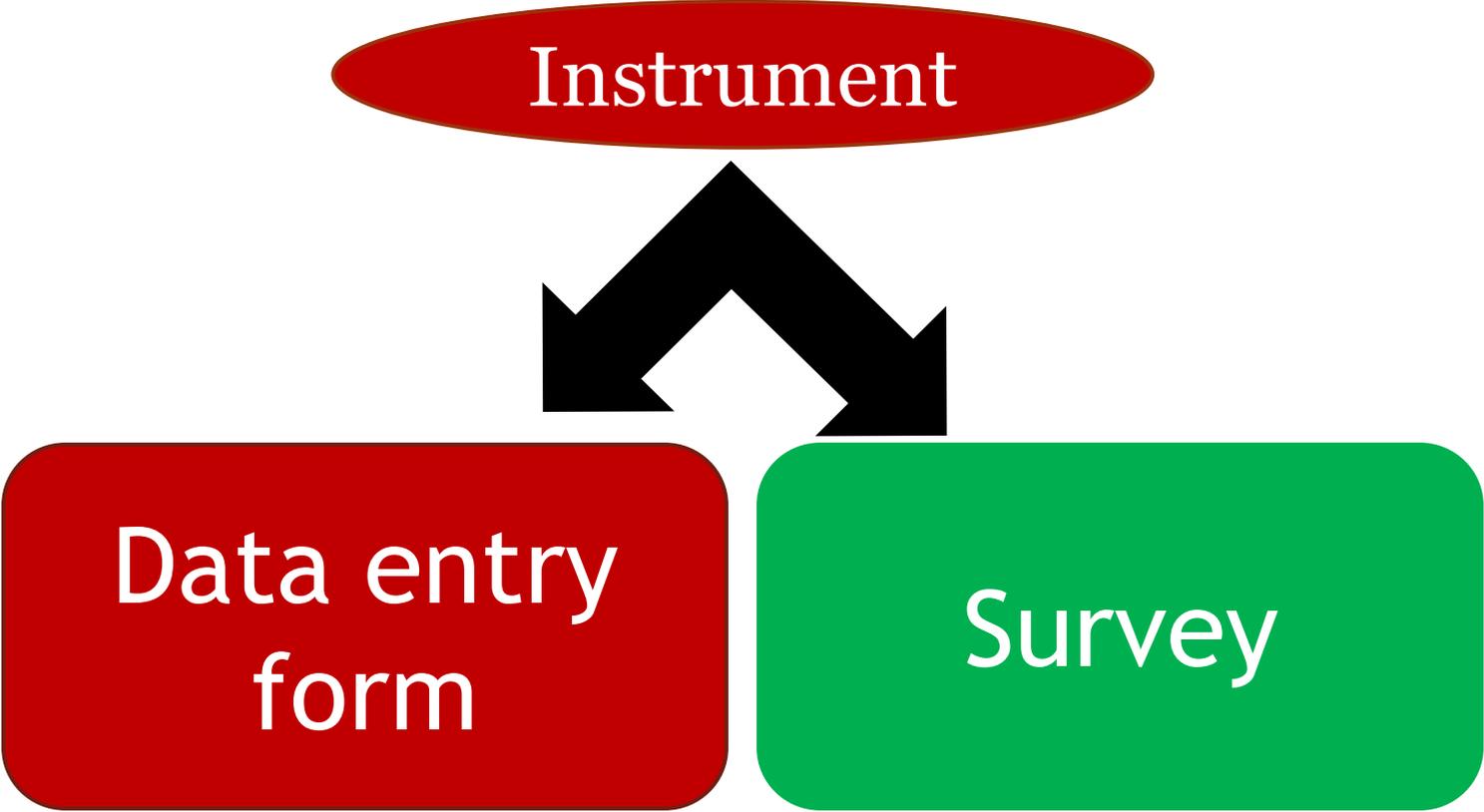
 Choose action for record ▾

Record ID **77** (Yellow, Yolanda)

 Data Collection Instrument	Status
Demographics	

Record ID	Demographics
77 (Yellow, Yolanda)	
78 (Purple, Patty)	
79 (Red, Roger)	
80 (Blue, Brad)	
81 (Celery, Catherine)	
82 (Azure, Aaron)	
83 (Ecru, Ellie)	

Instrument



```
graph TD; Instrument([Instrument]) --> DataEntryForm[Data entry form]; Instrument --> Survey[Survey];
```

Data entry
form

Survey

Instrument

Data entry
form

REDCap the Basics

On your
own



Individualized
Support



 Help & FAQ

(esp. Survey Wizard!)



Your role in a REDCap project



Design



Data
entry



Viewing/
Analyzing
Data

Create a project

Home My Projects **+ New Project** Help & FAQ Training Videos Send-It Messenger

Logged in as
red_0004

+ Create a new REDCap Project

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

Project title:

Title to be displayed on project webpage

Purpose of this project:

How will it be used?

--- Select One ---

- Select One ---
- Select One ---
- Practice / Just for fun**
- Operational Support
- Research
- Quality Improvement
- Other

Project notes (optional):

Comments describing the project's use or purpose that are displayed on the My Projects page.

Start project from scratch or begin with a template?

- Create an empty project (blank)
- Upload a REDCap project XML
- Use a template (choose one below)

Choose a project template (comes pre-filled with fields, forms, etc.) Use a template (choose one below)

select template	Template title (sorted by title)	Template description
	A Single Survey (demo of field	A single data collection instrument enabled as a survey. Demonstrates the most frequently-

Research project

Research ▼

Name of P.I. (if applicable):

First name MI Last name

Email of P.I. (if applicable)

Name of P.I. as cited in publications (if applicable):

(e.g., Harris PA)

VUnetID of P.I. (if applicable):

IRB number (if applicable):

Grant number (if applicable):

Please specify:

- Basic or bench research
- Clinical research study or trial
- Translational research 1 (applying discoveries to the development of trials and studies in humans)
- Translational research 2 (enhancing adoption of research findings and best practices into the community)
- Behavioral or psychosocial research study
- Epidemiology
- Repository (developing a data or specimen repository for future use by investigators)
- Other

Human Subjects Research

- IRB approval required
- Electronic consent framework is available

Vanderbilt/Meharry User FAQ Pages:

[Vanderbilt/Meharry REDCap Users FAQ](#)

[Accessing REDCap](#)

[Project Development](#)

[Data Management](#)

[e-Consent](#)

[Clinical Data Pull from eStar \(DDP on FHIR\)](#)

[Twilio Module](#)

[External Modules](#)

[Help Resources](#)

[User Guide](#)

*(Resource page for
Vanderbilt / Meharry users)*

Project Creation Options

Start project from scratch
or begin with a template?

- Create an empty project (blank slate)
- Upload a REDCap project XML file (CDISC O
- Use a template (choose one below)

★ Choose a project template (comes pre-filled with fields, forms/surveys, and o

select template	Template title (sorted by title)	Template de
<input type="radio"/>	A. Single Survey (demo of field types)	A single used f
<input type="radio"/>	B. Multiple Surveys	Examp study.
<input type="radio"/>	C. Demographics	A single data instrument us
<input type="radio"/>	D. Research Study	Example research collecting der results, and study completion data.

Create Project

Cancel

~20 templates:
Surveys
consent forms
regulatory binders
employee training
...

Project Setup Page



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

Project status: Development Completed steps 0 of 7

Main project settings

In progress

- Basic** Use longitudinal data collection with repeating forms? [?] [VIDEO: How to create and manage a survey](#)
- Advanced** Use surveys in this project? [?]
-

Design your data collection instruments

In progress

Add or edit fields on your data collection instruments. This may be done by either using the Online Designer (online method) or by uploading a Data Dictionary (offline method), in which you may use either method or both. Quick links: [Download PDF of all data collection instruments](#) OR [Download the current Data Dictionary](#)

Go to: or

You may also browse for pre-built data collection instruments in the [REDCap Shared Library](#)

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

Enable optional modules and customizations

Optional

- Basic** Auto-numbering for records [?]
- Advanced** Scheduling module (longitudinal only) [?]
- Basic** Randomization module [?]
- Advanced** Designate an email field to use for invitations to survey participants [?]

Set up project bookmarks (optional)

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:

User Rights and Permissions

Optional

You may grant other users access to this project or edit the user privileges of current users on the project by navigating to the User Rights page. Additionally, if you wish to limit user access to certain records/responses for this project, you may want to use Data Access Groups, in which only users within a given Data Access Group can access records created by users within that group.

Go to: or

Test your project thoroughly

Not started

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.

Move your project to production status

Not started

Move the project to production status so that real data may be collected. Once in production, you will not be able to edit the project fields in real time anymore. However, you can make edits in Draft Mode, which will then need to be approved by a REDCap administrator before taking effect.

Go to:

Design Data Collection Instruments

 **Not started**

Design 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 or

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

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

Online Designer

Current instrument: **Baseline Data**

Preview instrument

Add Field Add Matrix of Fields



Baseline Measurements

Add Field Add Matrix of Fields

Variable: date_visit_b

Date of baseline visit



Today

Y-M-D

Add Field Add Matrix of Fields

Variable: date_blood_b

Date blood was drawn



Today

Y-M-D

Add Field Add Matrix of Fields

Variable: alb_b

Serum Albumin (g/dL)

Add Field Add Matrix of Fields

Variable: prealb_b

Serum Prealbumin (mg/dL)

Add Field Add Matrix of Fields

Variable: creat_b

Creatinine (mg/dL)

Record Identifier

 Project Home

 Project Setup

 Online Designer

 Data Dictionary

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

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.

 [Return to list of instruments](#)

Current instrument: **Demographics**

[Preview instrument](#)

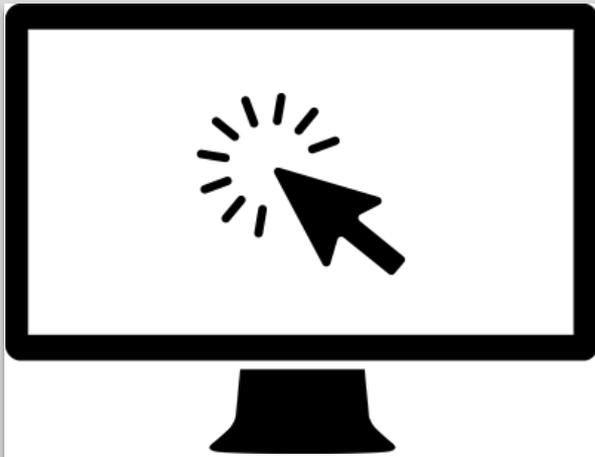
 Variable: record_id

Record ID

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

[Add Field](#)

[Add Matrix of Fields](#)



Hands-on Demo

- Build a project - test Employee Directory
- Learn how to navigate your project pages
- Rename instrument in Online Designer

Field (question) Types

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

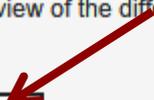
Signature (draw signature with mouse or finger)

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)



What form
will the answer
be in?



How will the
person
entering the
data enter
the answer?



When possible, select a field type that will collect data in a quantitative manner

Provide a list of choices rather than asking an open-ended question

If alpha-numeric text, add validation when possible to restrict the type of text entered

Instead of open-ended (text box field type)...

     Variable: insttext

With which institution are you affiliated?

With which institution are you affiliated? inst
Vandy
VUMC
VU
Vanderbilt
Med Ctr
Vanderbilt University Medical Center
Vandy
VUMC
Vandy
VU
Vanderbilt University

With which institution are you affiliated? (inst)

Total Count (N)	Missing
11	<u>1</u> (8.3%)

...use close-ended (multiple-choice):

     Variable: inst

With which institution are you affiliated?

Vanderbilt University

Vanderbilt University Medical Center

Meharry Medical College

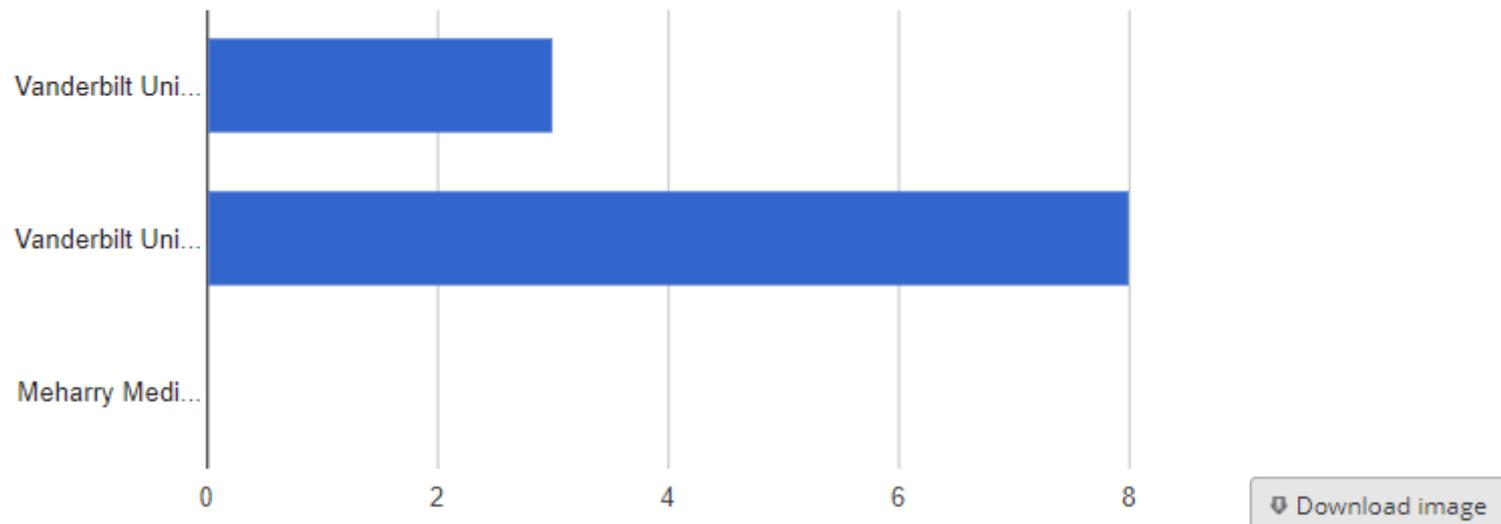
reset

Quantitative questions will yield graphical and statistical results

With which institution are you affiliated? (*inst*) [Refresh Plot](#) | [View as Bar Chart](#) ▼

Total Count (N)	Missing	Unique
11	8 (42.1%)	2

Counts/frequency **Vanderbilt University (3, 27.3%)** Vanderbilt University Medical Center (8, 72.7%), Meharry Medical College (0, 0.0%)



When collecting this type of data...

Date

Email

Integer

Number

Phone (North America)

Time

Vanderbilt MRN

Zip code (US)

Instead of open-ended (text box field type)...

     Variable: date

What is today's date?

- Today's date: regdate
- 12/6/2018
- December 4, 2018
- December 8, 2018
- 8/12/2018
- 08-12-2018
- December

...use a text box field type with validation

     Variable: date

What is today's date?  Today M-D-Y

- Today's date: regdate
- 12-08-2018
- 12-08-2018
- 12-08-2018
- 12-04-2018
- 12-06-2018

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

Field Label

[Empty text input field for Field Label]

Action Tags / Field Annotation (optional)

[Empty text input field for Action Tags / Field Annotation]

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

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

[Empty text input field for Variable Name]

Enable auto naming of variable based upon its Field Label?

ONLY letters, numbers, and underscores

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

Validation? (optional)

---- None ----

-- select ontology ser

Required?* No Yes
* Prompt if field is blank

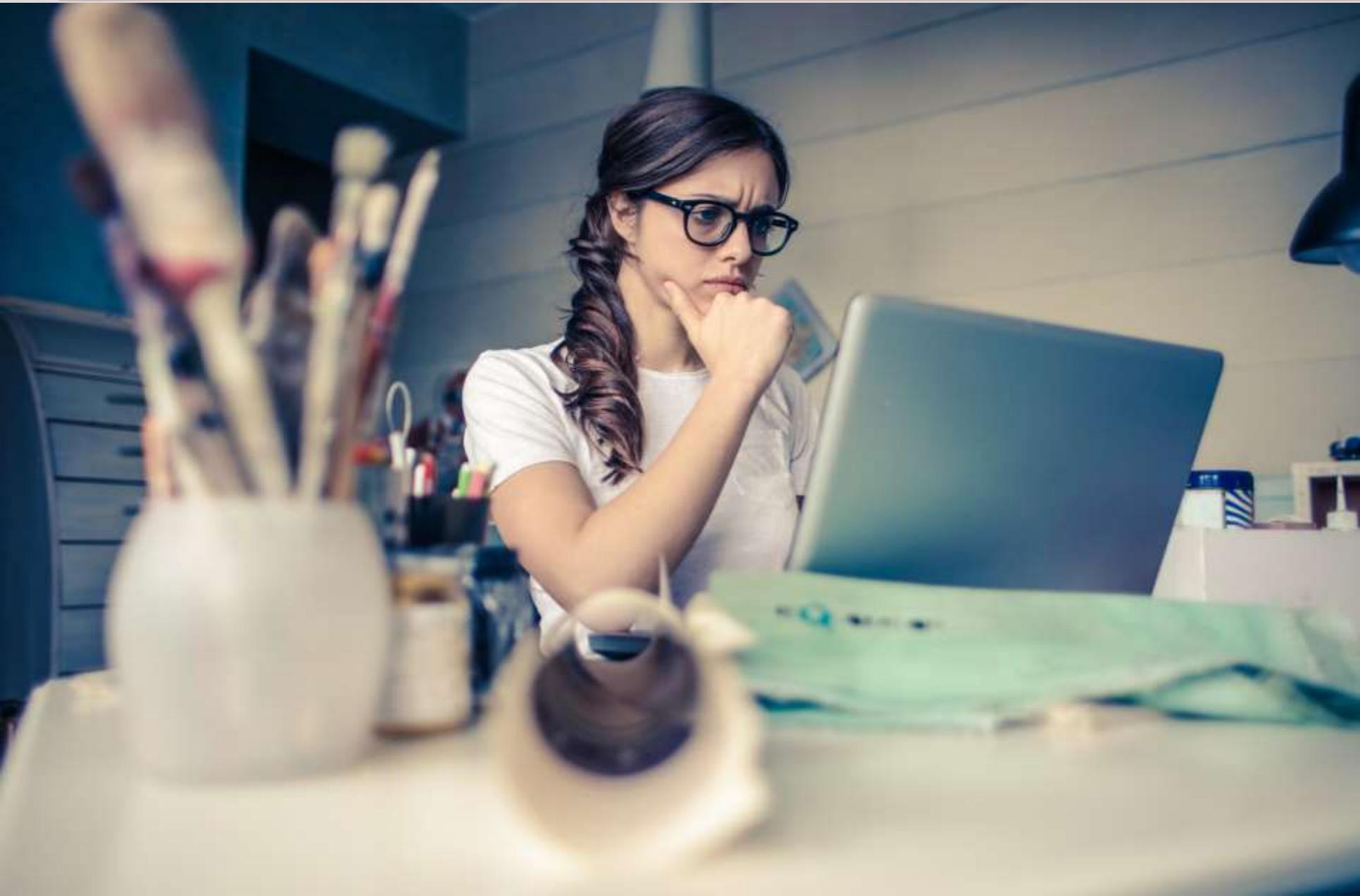
Identifier? No Yes
Does the field contain identify

Custom Alignment
Align the position of the field d

Field Note (optional)
Small reminder text displayed

- None ----
- None ----
- Date (D-M-Y)
- Date (M-D-Y)
- Date (Y-M-D)
- Datetime (D-M-Y H:M)
- Datetime (M-D-Y H:M)
- Datetime (Y-M-D H:M)
- Datetime w/ seconds (D-M-Y H:M:S)
- Datetime w/ seconds (M-D-Y H:M:S)
- Datetime w/ seconds (Y-M-D H:M:S)
- Email
- Integer
- Number
- Phone (North America)
- Time (HH:MM)
- Vanderbilt MRN
- Zipcode (U.S.)

BUT SOME FIELD TYPES ARE SIMILAR, THO...



Multiple Choice options

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)

Radio buttons - short list of choices

With which institution are you affiliated?

- Vanderbilt University
- Vanderbilt University Medical Center
- Meharry Medical College

reset

With which department are you affiliated?

How do you anticipate using REDCap?

- for databases
- for surveys
- for both surveys and databases

reset

Do you anticipate designing/building a REDCap project?

- Yes
- No

Drop-down list: Long list of choices

With which institution are you affiliated?

- Vanderbilt University
- Vanderbilt University Medical Center
- Meharry Medical College

reset

With which department are you affiliated?

- Allergy Pulmonary Critical Medicine
- Allied Health
- Arts & Sciences
- Biomed Research Edu and Training
- Cardiovascular Medicine
- Eskind Biomedical Library
- Executive Health and Wellness
- Finance
- General Internal Medicine
- Genetic Medicine
- HealthIT Clin Group
- HealthIT VHAN Analysis
- Health Services Research Center

reset

reset

Do you anticipate designing/building a REDCap project?

(Some people only enter data into existing projects and are not involved with the design of the project)

Do you anticipate entering data into a REDCap project?

- Yes
- No

reset

With which institution are you affiliated?

- Vanderbilt University
- Vanderbilt University Medical Center
- Meharry Medical College

reset

With which department are you affiliated?

How do you anticipate using REDCap?

- for databases
- for surveys
- for both surveys and databases

reset

Do you anticipate designing/building a REDCap project?

- Yes
- No

Checkboxes - to mark more than one choice

What REDCap topics would you like to see covered in future trainings?

- Action tags
- Piping
- Surveys
- Data Dictionary - when to use
- Using the Data Import Tool
- Optional Modules and Customizations
- Other

Group questions or provide information

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)

Screening information

Begin New Section

Which of the following medications is being taken? (check all that apply)

- Lexapro
- Celexa
- Prozac
- Paxil
- Zoloft
- Other
- None of the above

consult the [study protocol](#) for other examples of meds we need to document!

Height (cm)

(130-215)

Weight (kilograms)

(35-200)

BMI

[View equation](#)

Is the participant currently **ACTIVE** on the study?

- Yes
 No

[reset](#)

STOP!

Descriptive Text

This person is no longer on the study, so you need to **cancel any remaining visits or surveys**. Check the study protocol for detailed instructions. Enter the date below when you've completely finished with all their study close-out procedures.

Attachment:  [Study Protocol.docx](#) (0.01 MB)

Date removed from study

 Today Y-M-D

Comments

Alpha-numeric 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:

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)

Notes - more room

Do you have any suggestions for changes to the presentation?

This could be:

- the order in which the material was presented
- material that could have been omitted
- material that should have been presented that wasn't
- length of the session, etc.



Expand

Compared to text box...

Do you have any suggestions for changes to the presentation?

This could be:

- the order in which the material was presented
- material that could have been omitted
- material that should have been presented that wasn't
- length of the session, etc.



Signature

Please sign your name with your finger or mouse:

 [Add signature](#)

Add signature 

Please sign your name with your finger or mouse:

 SIGN HERE



Save signature

[reset](#)

Please sign your name with your finger or mouse:



[signature_2019-02-04_1353.png\(0.01 MB\)](#)

 [Remove file](#)

Field label = your question

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 [How to use Piping](#)

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

Explanatory notes - not displayed on any page [?](#)

Variable Name (utilized during data export)

 Enable auto naming of variable based upon its Field Label?
ONLY letters, numbers, and underscores

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

Choices

Edit Field

You may add a new project field to this data collection instrument by completing the fields below and clicking the Save button at the bottom. When you add a new field, it will be added to the form on this page. For an overview of the different field types available, you may view the [Field Types video \(4 min\)](#).

Field Type: Multiple Choice - Radio Buttons (Single Answ ▾)

Question Number (optional)
Displayed only on the survey page

Field Label
With which institution are you affiliated?

Choices (one choice per line) [Copy existing choices](#)

- 1, Vanderbilt University
- 2, Vanderbilt University Medical Center
- 3, Meharry Medical College

[How do I manually code the choices?](#)

Action Tags / Field Annotation (optional)

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

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

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

Required?* No Yes
* Prompt if field is blank

Identifier? No Yes
Does the field contain identifying information (e.g., name, SSN, address)?

Custom Alignment
Align the position of the field on the page

Field Note (optional)
Small reminder text displayed underneath field

Save **Cancel**

Variable Name

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 [How to use Piping](#)

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

Explanatory notes - not displayed on any page ?

Variable Name (utilized during data export)

Enable auto naming of variable based upon its Field Label?

ONLY letters, numbers, and underscores

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)?

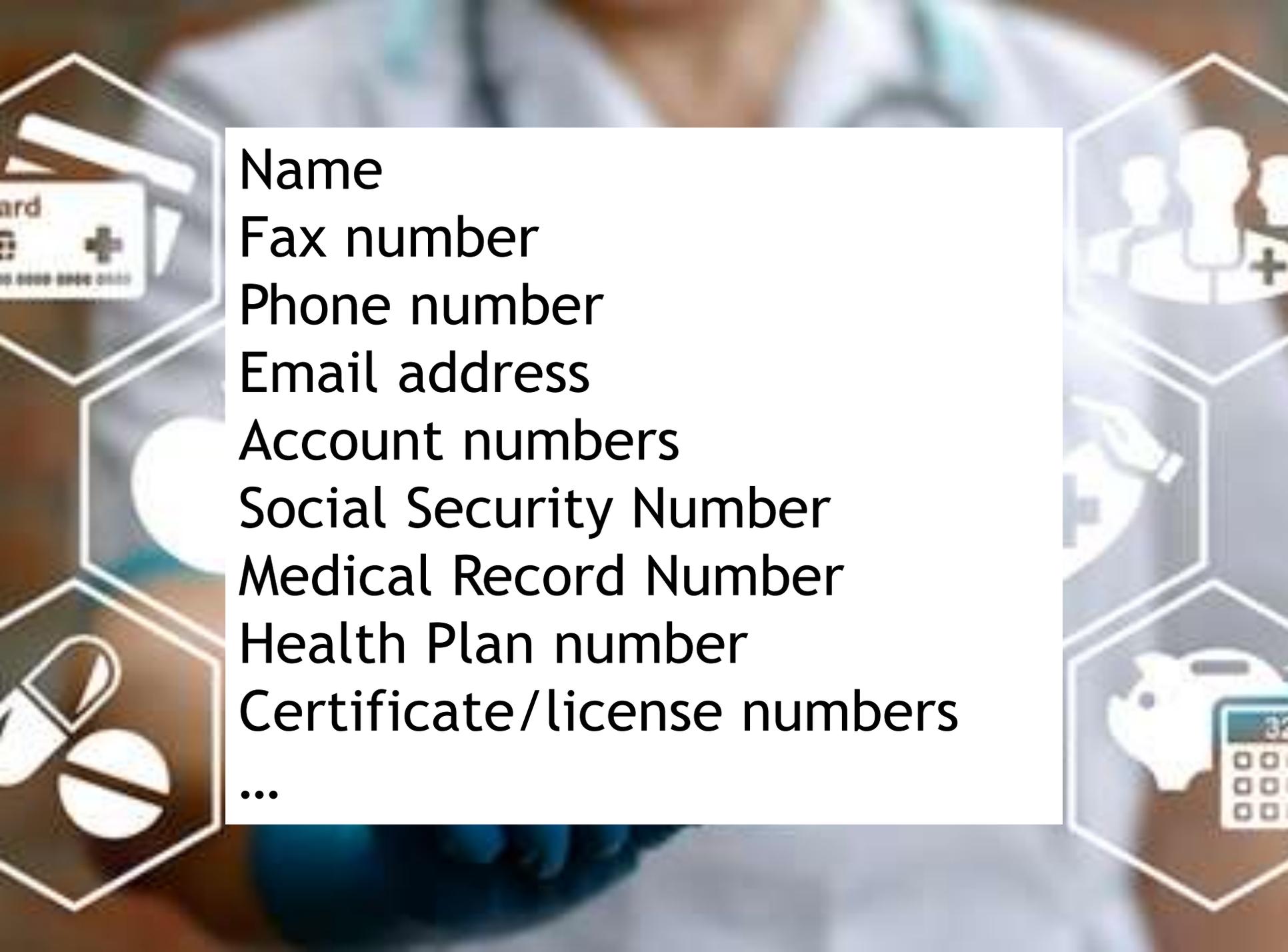
Custom Alignment Right / Vertical (RV) ▼

Align the position of the field on the page

Field Note (optional)

Small reminder text displayed underneath field

Save **Cancel**



Name
Fax number
Phone number
Email address
Account numbers
Social Security Number
Medical Record Number
Health Plan number
Certificate/license numbers
...

Identifier

Add ✕

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 [How to use Piping](#)

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

Explanatory notes - not displayed on any page ?

Variable Name (utilized during data export)

Enable auto naming of variable based upon its Field Label?

ONLY letters, numbers, and underscores

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**



Edit/Copy/Move/Delete fields

Variable: favorite_ice_cream

What is your favorite flavor of ice-cream?

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

Check all that apply.

Branching Logic

What is your favorite flavor ice cream?

- Chocolate
- Strawberry
- Vanilla
- Other

Please specify:

Apply Branching Logic to the follow-up question

     Variable: othericecream

Please specify:

Branching Logic Builder

➔ Add/Edit Branching Logic

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: **otherflavor** - *Please specify:*

Advanced Branching Logic Syntax

How to use

[Branching Logic](#)

[Smart Variables](#)

Show the field ONLY if...

[Clear](#)

Test logic with a record: -- select record -- ▾

— OR —

Drag-N-Drop Logic Builder

Field choices from other fields

(drag a choice below to box on right)

participant_id = (define criteria)	➔
name = (define criteria)	➔
flavor = Chocolate (1)	➔
flavor = Strawberry (2)	➔
flavor = Vanilla (3)	➔
flavor = Other (4)	➔
title = (define criteria)	➔
registrationdate = (define criteria)	➔
registrationdate = (define criteria)	➔
registrationdate = (define criteria)	➔

Drag
and
Drop

Show the field ONLY if...

ALL below are true

ANY below are true

[Clear](#)

Field choices from other fields

(drag a choice below to box on right)

participant_id = (define criteria)

name = (define criteria)

flavor = Chocolate (1)

flavor = Strawberry (2)

flavor = Vanilla (3)

flavor = Other (4)

Variable
Name

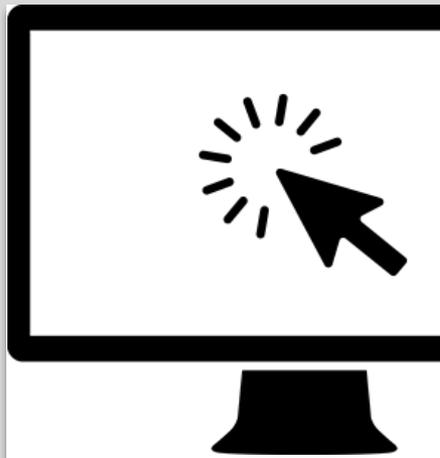
Raw
value



Variable: othericecream

Branching logic: [flavor] = '4'

Please specify:



— 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)

- Employee name
- Employment status
- Employee email address
- Name of employee's supervisor



Entering Data

Data Entry Form - accessed by REDCap users

The screenshot displays the REDCap interface for a data entry form. On the left is a navigation sidebar with sections: 'My Projects' (My Projects, REDCap Messenger), 'Project Home and Design' (Project Home, Project Setup, Designer, Dictionary, Codebook, Project status: Development), 'Data Collection' (Survey Distribution Tools, Record Status Dashboard, Add / Edit Records, Record ID 84), and 'Applications' (Alerts & Notifications, Calendar, Data Exports, Reports, and Stats). The main area is titled 'Example Research Study' and includes actions like 'Modify instrument', 'Download PDF of instrument(s)', and 'VIDEO: Basic data entry'. A 'Save & Exit Form' button is in the top right. The form is for 'Record ID 84' and is titled 'Demographics'. It contains the following fields: Record ID (84), Contact Information (First Name, Last Name, Phone number with 'Include Area Code' checkbox), E-mail, Date of birth (with a calendar icon and 'Y-M-D' label), Ethnicity (radio buttons for 'Hispanic or Latino', 'NOT Hispanic or Latino', and 'Unknown / Not Reported'), Race (dropdown menu), Gender (radio buttons for 'Male', 'Female', and 'non-binary'), and 'Has the patient given birth before?' (radio buttons for 'Yes' and 'No'). A 'Screening information' section is partially visible at the bottom.

REDCap

Logged in as rc_fund | Log out

My Projects
REDCap Messenger

Project Home and Design

Project Home · Project Setup
Designer · Dictionary · Codebook
Project status: Development

Data Collection

Survey Distribution Tools
- Get a public survey link or build a participant list for inviting respondents

Record Status Dashboard
- View data collection status of all records

Add / Edit Records
- Create new records or edit/view existing ones

Record ID 84 [Select other record](#)

Data Collection Instruments:

Demographics

Baseline Data
Pain Management Survey - PRE
Intervention Data
Pain Management Survey - POST
Study Completion

Applications

Alerts & Notifications
Calendar
Data Exports, Reports, and Stats

Example Research Study

Actions: [Modify instrument](#) [Download PDF of instrument\(s\)](#) [VIDEO: Basic data entry](#)

Demographics

Adding new Record ID 84

Record ID 84

Contact Information

First Name

Last Name

Phone number Include Area Code

E-mail

Date of birth Y-M-D

Ethnicity Hispanic or Latino
 NOT Hispanic or Latino
 Unknown / Not Reported [reset](#)

Race

Gender Male
 Female
 non-binary [reset](#)

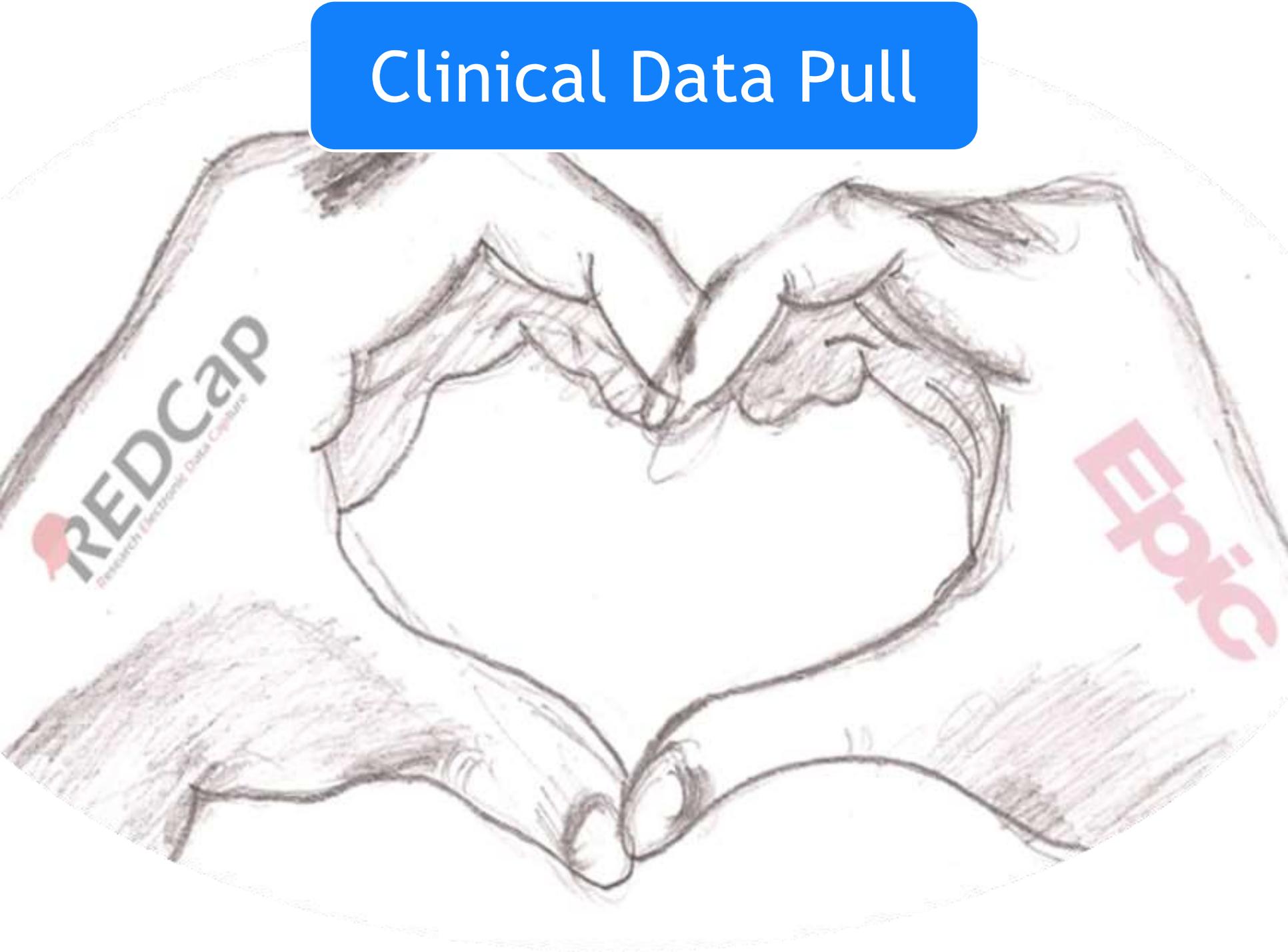
Has the patient given birth before? Yes
 No [reset](#)

Screening information

[Save & Exit Form](#)
[Save & Stay](#)
[Cancel](#)

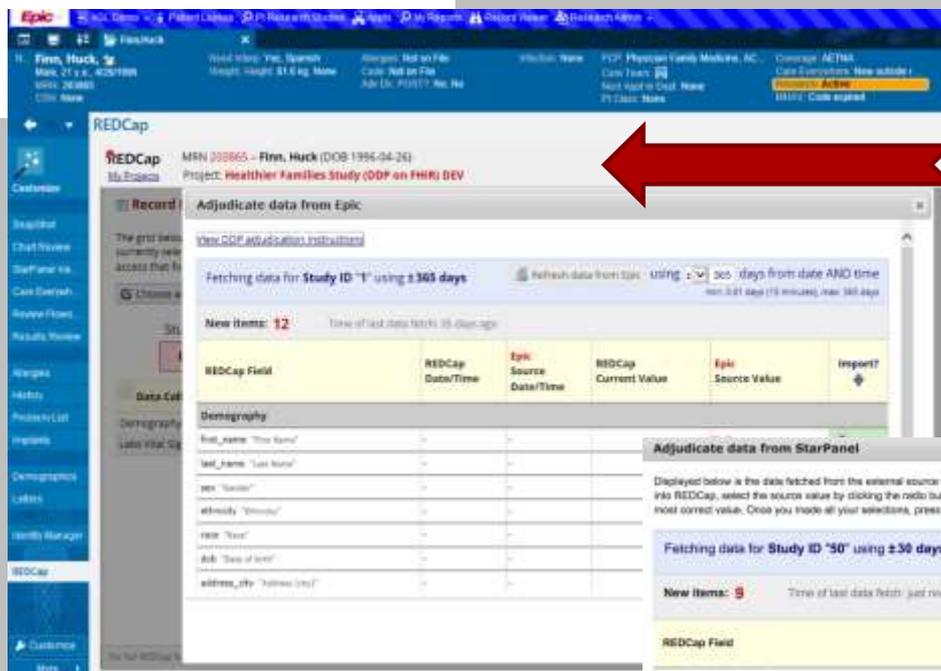


Clinical Data Pull



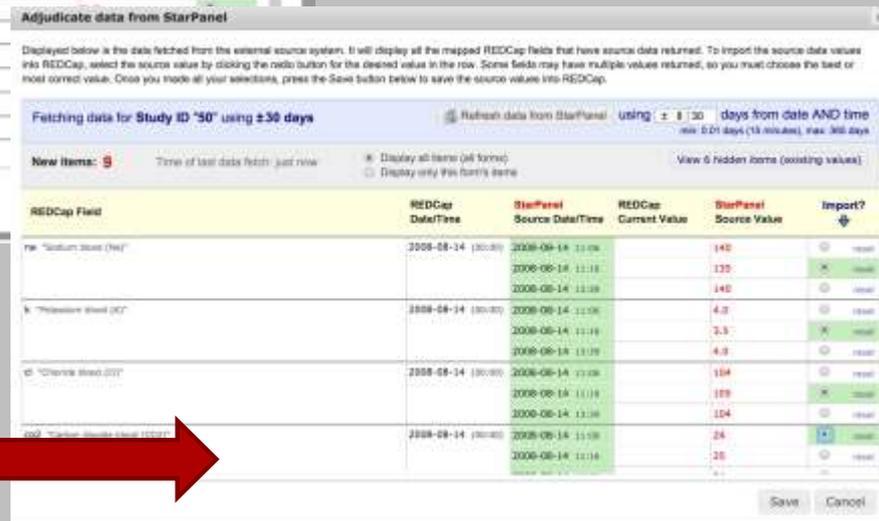


REDCap inside Epic



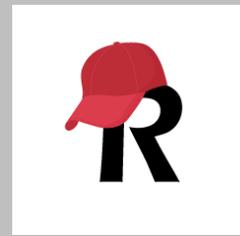
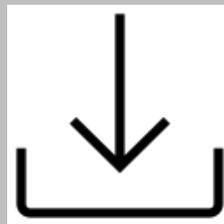
Adjudication Screen in Epic

Adjudication Screen in REDCap



Save Cancel

Epic



Demographics

Condition

Medications

Allergy Intolerance

Vital Signs

Laboratory

Resource page for Vanderbilt/Meharry users

Vanderbilt/Meharry REDCap Users FAQ

How to use this page

Welcome to the Vanderbilt/Meharry REDCap user FAQ space.

Several pages are displayed to the right, in the "Vanderbilt/Meharry User FAQ Pages" section. You may access the frequently asked questions (FAQ) about each specific topic by clicking on the links in that section or by clicking on the topic category below.

The current content of these pages falls into the following categories:

- [Accessing REDCap](#): user access, login and account information, accessibility on mobile devices and offline
- [Project Development](#): getting started, system security, survey-specific features
- [Data Management](#): production mode, deleting and exporting data
- [e-Consent](#): electronic consent forms for human subjects research
- [Clinical Data Pull \(CDP\)](#): automated import from eStar data; formerly known as DDP on FHIR
- [Twilio Module](#): voice calling and text messaging services for surveys
- [External Modules](#): background about unofficial add-ons available in local REDCap projects
- [Help Resources](#)
- [User Guide](#)



Vanderbilt/Meharry User FAQ Pages:

[Vanderbilt/Meharry REDCap Users FAQ](#)
[Accessing REDCap](#)
[Project Development](#)
[Data Management](#)
[e-Consent](#)
[Clinical Data Pull from eStar \(DDP on FHIR\)](#)
[Twilio Module](#)
[External Modules](#)
[Help Resources](#)
[User Guide](#)



Powered by  VANDERBILT

Before
you do
that...

Test your project!



Complete!

[Not complete?](#)

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.

Enter test data!



Why enter test data?

With which institution are you affiliated?

inst

Vandy

VUMC

VU

Vanderbilt

Med Ctr

Vanderbilt University Medical

Vandy

VUMC

Vandy

VU

Vanderbilt University

With which institution are you affiliated? (inst)

Total
count

Today's date
regdate

12/6/2018

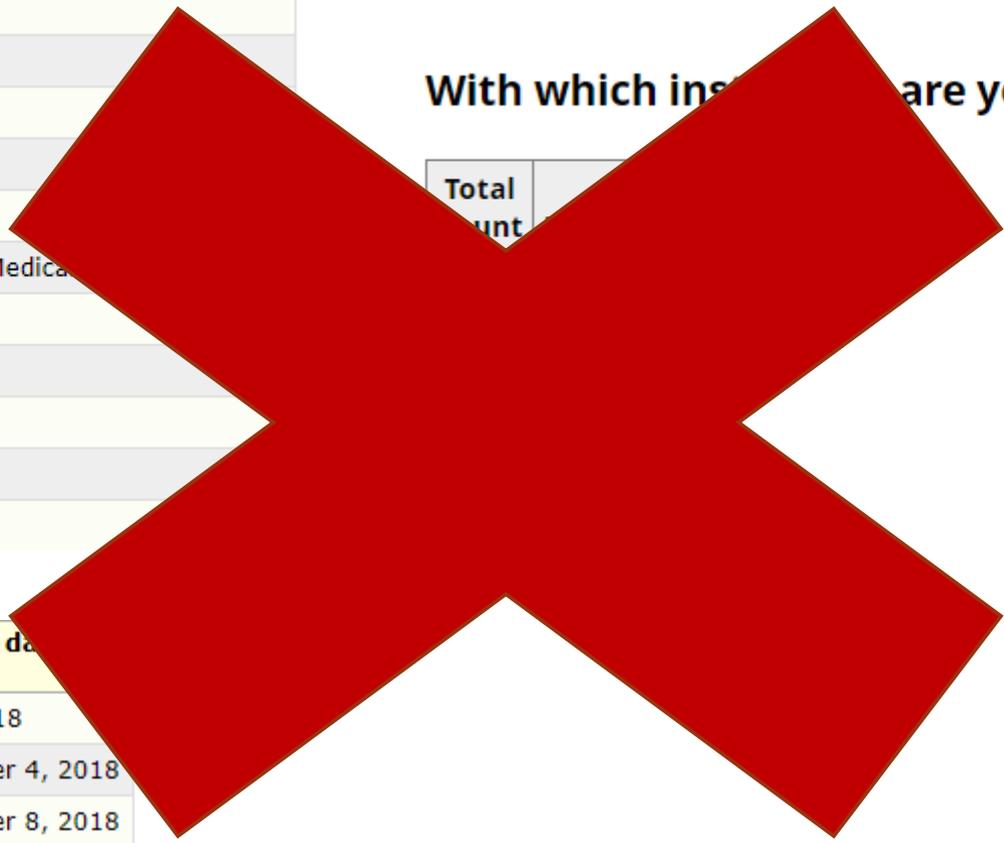
December 4, 2018

December 8, 2018

8/12/2018

08-12-2018

December



Add a test record

Logged in as **rc_fund** | Log out

My Projects
REDCap Messenger

Project Home and Design

Project Home · Project Setup
Designer · Dictionary · Codebook
Project status: **Development**

Data Collection

Survey Distribution Tools
- Get a public survey link or build a participant list for inviting respondents

Record Status Dashboard
- View data collection status of all records

Add / Edit Records
- Create new records or edit/view existing ones

Hide data collection instruments

Demographics
Baseline Data
Pain Management Survey - PRE
Intervention Data
Pain Management Survey - POST
Study Completion

Add / Edit Records

You may view an existing record/response by selecting it from the drop-down lists below. To create a new record, click the button below.

NOTICE: This project is currently in Development status. **Real data should NOT be entered** until the project has been moved to Production status.

Total records: **7**

Choose an existing Record ID

-- select record --

+ Add new record

Data Search

Choose a field to search
(excludes multiple choice fields)

All fields

Search query

Begin typing to search the project data, then click an item in the list to navigate to that record.

View
of
blank
record

Baseline Data

Adding new Study ID asdf345

Study ID asdf345

Baseline Measurements

Date of baseline visit Y-M-D

Date blood was drawn Y-M-D

Serum Albumin (g/dL)

Serum Prealbumin (mg/dL)

Creatinine (mg/dL)

Normalized Protein Catabolic Rate (g/kg/d)

Cholesterol (mg/dL)

Transferrin (mg/dL)

Kt/V

Dry weight (kilograms)

Collected Plasma 1?

Collected Plasma 2?

Collected Plasma 3?

Collected Serum 1?

Collected Serum 2?

Collected Serum 3?

Subject Global Assessment (score = 1-7)

Date patient begins supplement Y-M-D

Form Status

Complete?

Save & Exit Form

Save & Stay

-- Cancel --

Online Designer view of instrument

Current

Document

Add Field

Add Matrix of Fields



Baseline Measurements

Add Field

Add Matrix of Fields



Variable: date_visit_b

Date of baseline visit



Today

Y-M-D

Add Field

Add Matrix of Fields



Variable: date_blood_b

Date blood was drawn



Today

Y-M-D

Add Field

Add Matrix of Fields



Variable: alb_b

Serum Albumin (g/dL)

Add Field

Add Matrix of Fields



Variable: prealb_b

Serum Prealbumin (mg/dL)

Add Field

Add Matrix of Fields



Variable: creat_b

Creatinine (mg/dL)

Add Field

Add Matrix of Fields



🔒 Logged in as **rc_fund** | Log out

📄 My Projects

💬 REDCap Messenger

Project Home and Design

🏠 Project Home · ☰ Project Setup

✍️ **Designer** · 📖 Dictionary · 📄 Codebook

📄 Project status: **Development**

Data Collection

👤📄 Survey Distribution Tools

- Get a public survey link or build a participant list for inviting respondents

📅 Record Status Dashboard

- View data collection status of all records

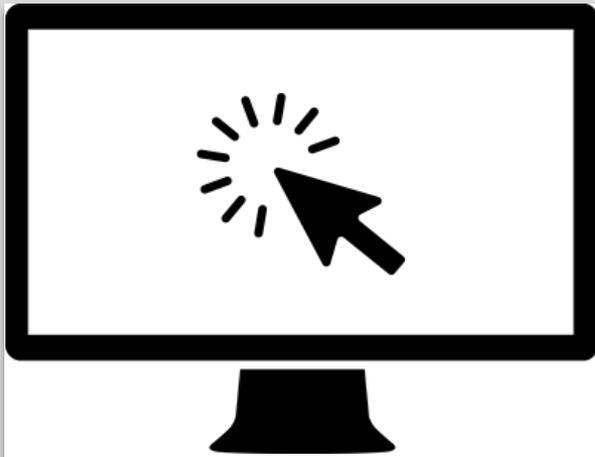
📄 **Add / Edit Records**

- Create new records or edit/view existing ones



Data Entry

- You can use the tab key to move from one question to the next
- Validation will force you to enter data enter a specific way
- Branching logic will determine what questions you see
- Required questions force you to enter an answer for those questions in order to save
- Each entry creates a record



Hands-on Demo

Add test data to your project

Viewing Data

- Individual records
- Aggregate Data
- Sub-sets of Data



Record Status Dashboard

Logged in as **rc_fund** | Log out

My Projects
REDCap Messenger

Project Home and Design

Project Home · Project Setup
Designer · Dictionary · Codebook
Project status: **Development**

Data Collection

Survey Distribution Tools
- Get a public survey link or build a participant list for inviting respondents

Record Status Dashboard
- View data collection status of all records

Add / Edit Records
- Create new records or edit/view existing ones

Show data collection instruments

Applications

Reports [Search](#) [Organize](#) [Edit](#)

Help & Information

Help & FAQ
Video Tutorials
Suggest a New Feature

Contact REDCap administrator

Record Status Dashboard (all records)

Displayed below is a table listing all existing records/responses and their status for every data collection instrument (and if longitudinal, for every event). You may click any of the colored buttons in the table to open a new tab/window in your browser to view that record on that particular data collection instrument. Please note that if your form-level user privileges are restricted for certain data collection instruments, you will only be able to view those instruments, and if you belong to a Data Access Group, you will only be able to view records that belong to your group.

Dashboard displayed: [Default dashboard] ▾

Create cu

Displaying record Page 1 of 1: "77" through "83" ▾ of 7 records

ALL (7) ▾

+ Add new record

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

Record ID	Demographics	Baseline Data	Pain Management Survey - PRE	Intervention Data	Pain Management Survey - POST	Study Completion
77 Yellow						
78 Purple						
79 Red						
80 Blue						
81 Celery						
82 Azure						
83 Ecrú						

Add/Edit Records

Logged in as **rc_fund** | Log out

- My Projects
- REDCap Messenger

Project Home and Design

- Project Home · Project Setup
- Designer · Dictionary · Codebook
- Project status: **Development**

Data Collection

- Survey Distribution Tools
- Get a public survey link or build a participant list for inviting respondents
- Record Status Dashboard
- View data collection status of all records
- Add / Edit Records**
- Create new records or edit/view existing ones

Show data collection instruments

Applications

Reports Search Organize Edit

Help & Information

- Help & FAQ
- Video Tutorials
- Suggest a New Feature

Contact REDCap administrator

Add / Edit Records

You may view an existing record/response by selecting it from the drop-down lists below. To create a new record, click the **+ Add new record** button below.

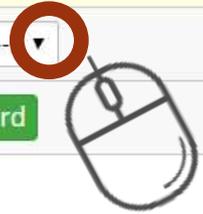
NOTICE: This project is currently in Development status. **Real data should NOT be entered** until the project has been moved to Production status.

Total records: **7**

Choose an existing Record ID

-- select record --

+ Add new record



Data Search

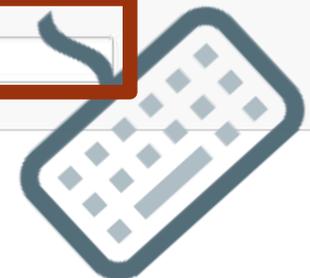
Choose a field to search

(excludes multiple choice fields)

All fields

Search query

Begin typing to search the project data, then click an item in the list to navigate to that record.



Record Home page

Record Home Page

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

 Choose action for record ▾

Study ID **EKG543** (Yellow, Yolanda)

 Data Collection Instrument	Status
Demographics	
Baseline Data	
Pain Management Survey - PRE (survey)	
Intervention Data	
Pain Management Survey - POST (survey)	
Study Completion	



Individual record

Baseline Data	
Editing existing Study ID EKG543 (Yellow, Yolanda)	
Study ID	EKG543
Baseline Measurements	
Date of baseline visit	<input type="text" value="2019-01-01"/> <input type="button" value="Today"/> Y-M-D
Date blood was drawn	<input type="text" value="2019-01-01"/> <input type="button" value="Today"/> Y-M-D
Serum Albumin (g/dL)	<input type="text" value="3"/>
Serum Prealbumin (mg/dL)	<input type="text" value="15"/>
Creatinine (mg/dL)	<input type="text" value="1"/>
Normalized Protein Catabolic Rate (g/kg/d)	<input type="text" value="1"/>
Cholesterol (mg/dL)	<input type="text" value="120"/>
Transferrin (mg/dL)	<input type="text" value="110"/>
Kt/V	<input type="text" value="2"/>
Dry weight (kilograms)	<input type="text" value="110"/>
Collected Plasma 1?	<input type="text" value="Yes"/>
Collected Plasma 2?	<input type="text"/>
Collected Plasma 3?	<input type="text"/>
Collected Serum 1?	<input type="text" value="Yes"/>
Collected Serum 2?	<input type="text"/>
Collected Serum 3?	<input type="text"/>
Subject Global Assessment (score = 1-7)	<input type="text" value="4"/>
Date patient begins supplement	<input type="text" value="2019-01-10"/> <input type="button" value="Today"/> Y-M-D
Form Status	
Complete?	<input type="text" value="Complete"/>
<input type="button" value="Save & Exit Form"/> <input type="button" value="Save & Stay"/>	

Viewing multiple records

Logged in as rc_fund | Log out

- My Projects
- REDCap Messenger
- Project Home and Design
- Data Collection
- Applications
- Alerts & Notifications
- Data Exports, Reports, and Stats**
- Data Comparison Tool
- Logging
- File Repository
- User Rights and DAGs
- Data Quality
- External Modules

Reports Search Organize Edit +

Data Exports, Reports, and Stats

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

[+ Create New Report](#)

[My Reports & Exports](#)

[Other Export Options](#)

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.

My Reports & Exports

Report name	View/Export Options	Management Options
A All data (all records and fields)	View Report Export Data Stats & Charts	
B Selected instruments (all records)	Make custom selections	



Sub-sets of Data

Example Research Study

Data Exports, Reports, and Stats

+ Create New Report

My Repo

Number of results returned **4**

Total number of records queried **7**

Female participants

Record ID record_id	First Name first_name	Last Name last_name
81 Celery	Catherine	Celery
83 Ecrú	Ellie	Ecrú
78 Purple	Patty	Purple
77 Yellow	Yolanda	Yellow

Create a custom report

Name of Report: Female participants

Description (optional):
Displayed on page below report name
HTML may be used in order to add links or to add style to text. [Expand](#)

STEP 1

User Access: Choose who can edit and view this report

View Access: Choose who sees this report on their left-hand project menu [?](#)

All users – OR – Custom user access (Choose specific users, roles, or data access groups who will have access)

Edit Access: Choose who can edit, copy, or delete this report (requires user to have 'Add/Edit/Organize Reports' privileges)

All users – OR – Custom user access (Choose specific users, roles, or data access groups who will have access)

STEP 2

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

Field	Field Name	Instrument
Field 1	record_id "Record ID"	Demographics
Field 2	first_name "First Name"	Demographics
Field 3	last_name "Last Name"	Demographics
Field 4	Type variable name or field label	

Additional report options (optional)

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

Combine checkbox options into single column of only the checked-off options (will be formatted as a text field when exported to stats packages)

STEP 3

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

Filter	Field	Operator	Value
Filter 1	gender "Gender"	=	Female
Filter 2	Type variable name or field label	=	

Switch format: [Use advanced logic](#)

Live Filters (optional) Live Filters can be selected on the report page for dynamically filtering data in real time. With the exception of the Record ID field, only multiple choice fields can be used as Live Filters (as well as Events, if longitudinal, and Data Access Groups, if any exist).

Live Filter 1	-- select a field --
Live Filter 2	-- select a field --
Live Filter 3	-- select a field --

STEP 4

Order the Results (optional)

First by	last_name "Last Name"	Ascending order
Then by	Type variable name or field label	Ascending order
Then by	Type variable name or field label	Ascending order

[Save Report](#) [Cancel](#)

Reports are bookmarked on the navigation bar

Logged in as rc_fund | Log out

- My Projects
- REDCap Messenger
- Project Home and Design
- Data Collection
- Applications
 - Alerts & Notifications
 - Calendar
 - Data Exports, Reports, and Stats
 - Data Import Tool
 - Data Comparison Tool
 - Logging
 - File Repository
 - User Rights and DAGs
 - Data Quality
 - External Modules
- Help & FAQ
- Video Tutorials
- Suggest a New Feature

- 1) All active participants
- 2) Only >200 cm height
- 3) Female participants

Data Exports, Reports, and Stats

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

[+ Create New Report](#)

[My Reports & Exports](#)

[Other Export Options](#)

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.

My Reports & Exports

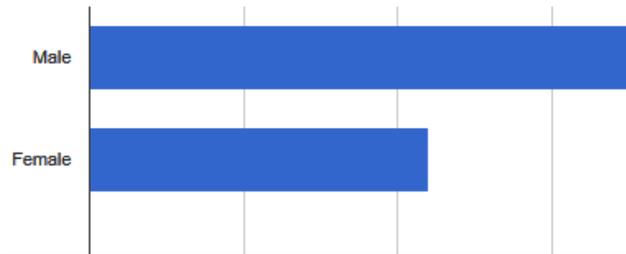
	Report name	View/Export Options	Management Options
A	All data (all records and fields)	View Report Export Data Stats & Charts	
B	Selected instruments (all records)	Make custom selections	
1	All active participants	View Report Export Data Stats & Charts	Edit Copy Delete
2	Only >200 cm height	View Report Export Data Stats & Charts	Edit Copy Delete
3	Female participants	View Report Export Data Stats & Charts	Edit Copy Delete
+ Create New Report			

Statistics and Graphs/Charts

Gender [Refresh Plot](#) | [View as Bar Chart](#) ▼

Total Count (N)	Missing	Unique
30	0 (0.0%)	2

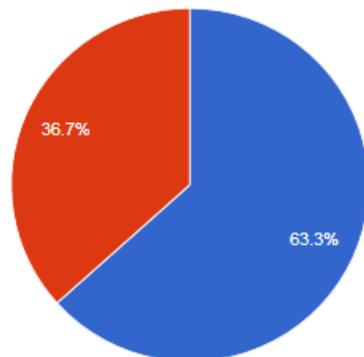
Counts/frequency: **Male** (19, 63.3%), **Female** (11, 36.7%), **Other** (0, 0.0%)



Gender [Refresh Plot](#) | [View as Pie Chart](#) ▼

Total Count (N)	Missing	Unique
30	0 (0.0%)	2

Counts/frequency: **Male** (19, 63.3%), **Female** (11, 36.7%), **Other** (0, 0.0%)



height < 150

DISPLAY OPTIONS

Optional: Select a record to overlay onto the plots below

-- select record -- ▼

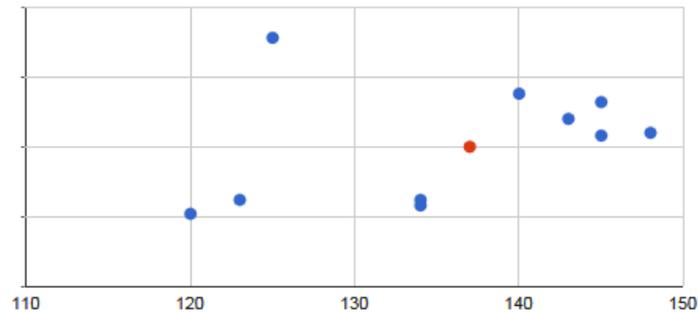
Viewing options: [Show plots & stats](#) [Show plots only](#) [Show stats only](#)

Height [Refresh Plot](#)

Total Count (N)	Missing	Unique	Min	Max	Mean	StDev	Sum	Percentile						
								0.05	0.10	0.25	0.50 Median	0.75	0.90	0.95
10	0 (0.0%)	8	120.00	148.00	135.70	10.13	1,357.00	121.35	122.70	127.25	137.00	144.50	145.30	146.65

Lowest values: 120, 123, 125, 134, 134

Highest values: 140, 143, 145, 145, 148



Export

Exporting "All data (all records and fields)"

Select your export settings, which includes the export format (Excel/CSV, SAS, SPSS, R, Stata) and whether or not to perform de-identification on the data set.

Choose export format

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

De-identification options (optional)

The options below allow you to limit the amount of sensitive information that you are exporting out of the project. Check all that apply.

Known Identifiers:

- Remove all tagged Identifier fields (tagged in Data Dictionary)
- Hash the Record ID field (converts record name to an unrecognizable value)

Free-form text:

- Remove unvalidated Text fields (i.e. Text fields other than dates, numbers, etc.)
- Remove Notes/Essay box fields

Date and datetime fields:

- Remove all date and datetime fields
- OR —
- Shift all dates by value between 0 and 364 days
(shifted amount determined by algorithm for each record) [What is date shifting?](#)

[Deselect all options](#)

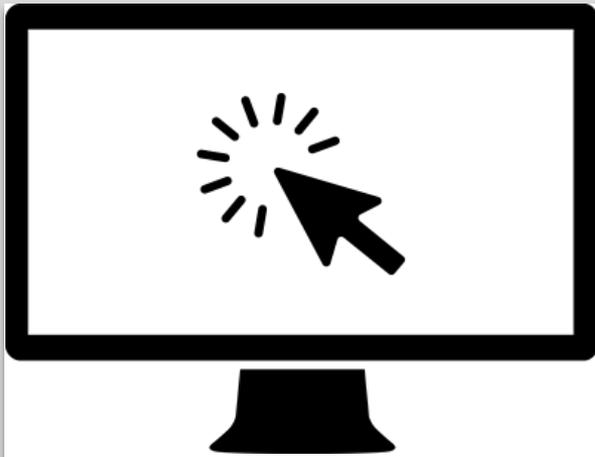
Export Data

Cancel





Viewing and
exporting reports is
a great way to TEST
YOUR PROJECT



Hands-on Demo

View data

Create Custom Report

Collaborating in REDCap



Project Access



User Rights

ss Groups



Logged in as rc_fund | Log out

My Projects

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Project Home and Design

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Applications

Alerts & Notifications

Calendar

Data Exports, Reports, and St

Data Import Tool

Data Comparison Tool

Logging

File Repository

User Rights and DAGs

Data Quality

External Modules

This page may be used for granting users access to this project and for managing the user privileges of those users. You can also create roles to which you may assign users (optional). User roles are useful when you will have several users with different 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 to 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 get 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)

Two quick notes:

1. To request an external user account (for someone outside Vanderbilt/Meharry), see instructions in User Guide
2. A REDCap administrator can create a REDCap account for someone, but it is the USER who adds their colleagues to the project

Defining Access Level

Basic Rights

Expiration Date (M/D/Y)
(if applicable)

Highest level privileges:

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

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

- Data Exports No Access →
- De-Identified* →
- Remove all tagged Identifier fields →
- Full Data Set →

* De-identified means that all free-form text fields will be removed, as well as any date/time fields and Identifier fields.

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

Other privileges:

- Survey Distribution Tools
- Calendar
- Data Import Tool
- Data Comparison Tool
- Logging
- File Repository

Data Entry Rights

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

	No Access	Read Only	View & Edit	Edit survey responses
Demographics	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Baseline Data	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	
Pain Management Survey - PRE (survey)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>
Intervention Data	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Pain Management Survey - POST (survey)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>
Study Completion	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	

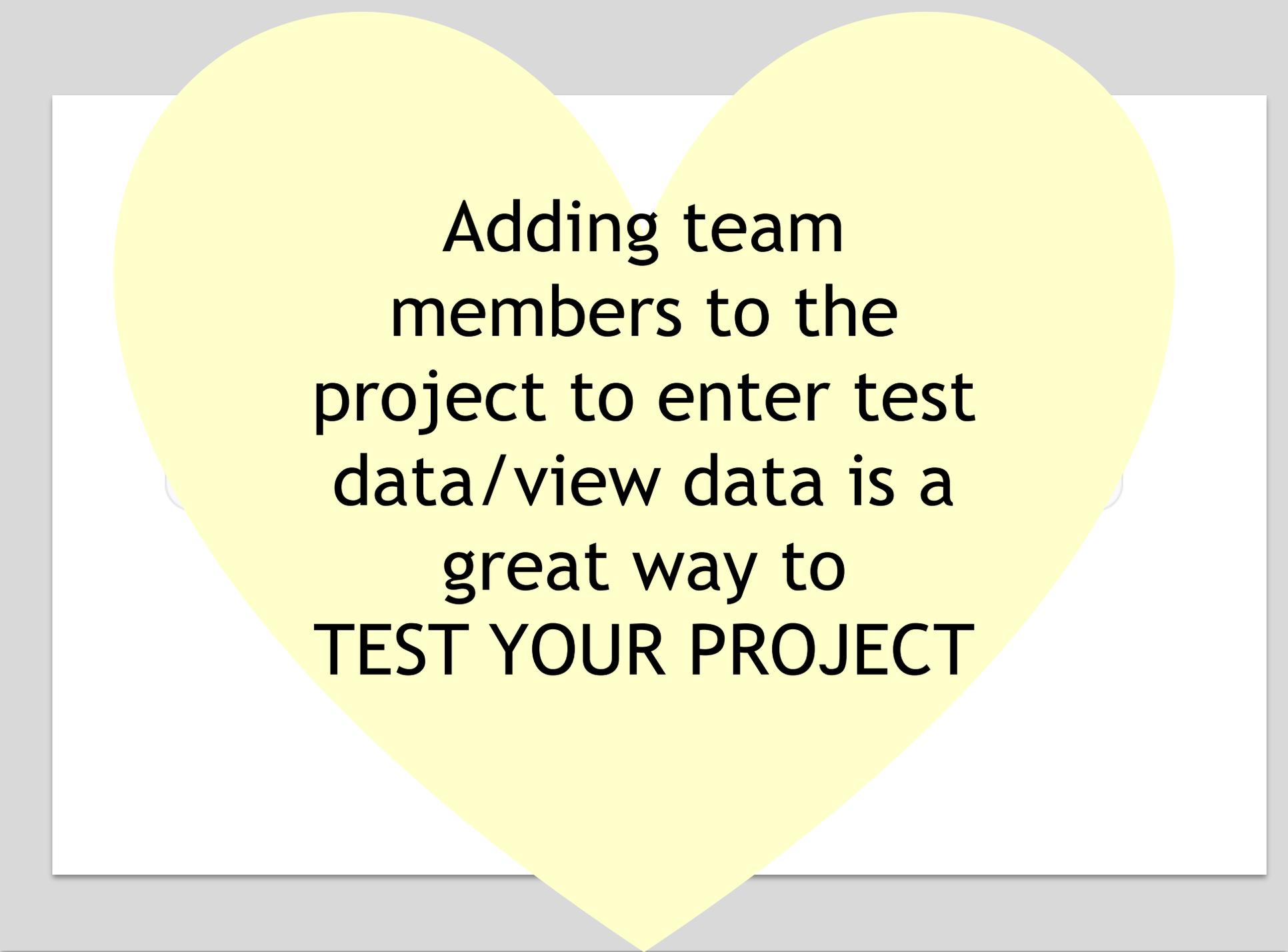
New User Notification

Notify user of their project access via email?

The case for multiple instruments

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

	No Access	Read Only	View & Edit	Edit survey responses
Camper Application (survey)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>
Camper application review	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	
Scholarship Application (survey)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
Scholarship Review	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Follow-Up Survey: Medical Information (survey)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
Nurse's Notes	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	



Adding team
members to the
project to enter test
data/view data is a
great way to
TEST YOUR PROJECT

Safeguarding your data





Move to Production



Not started

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.

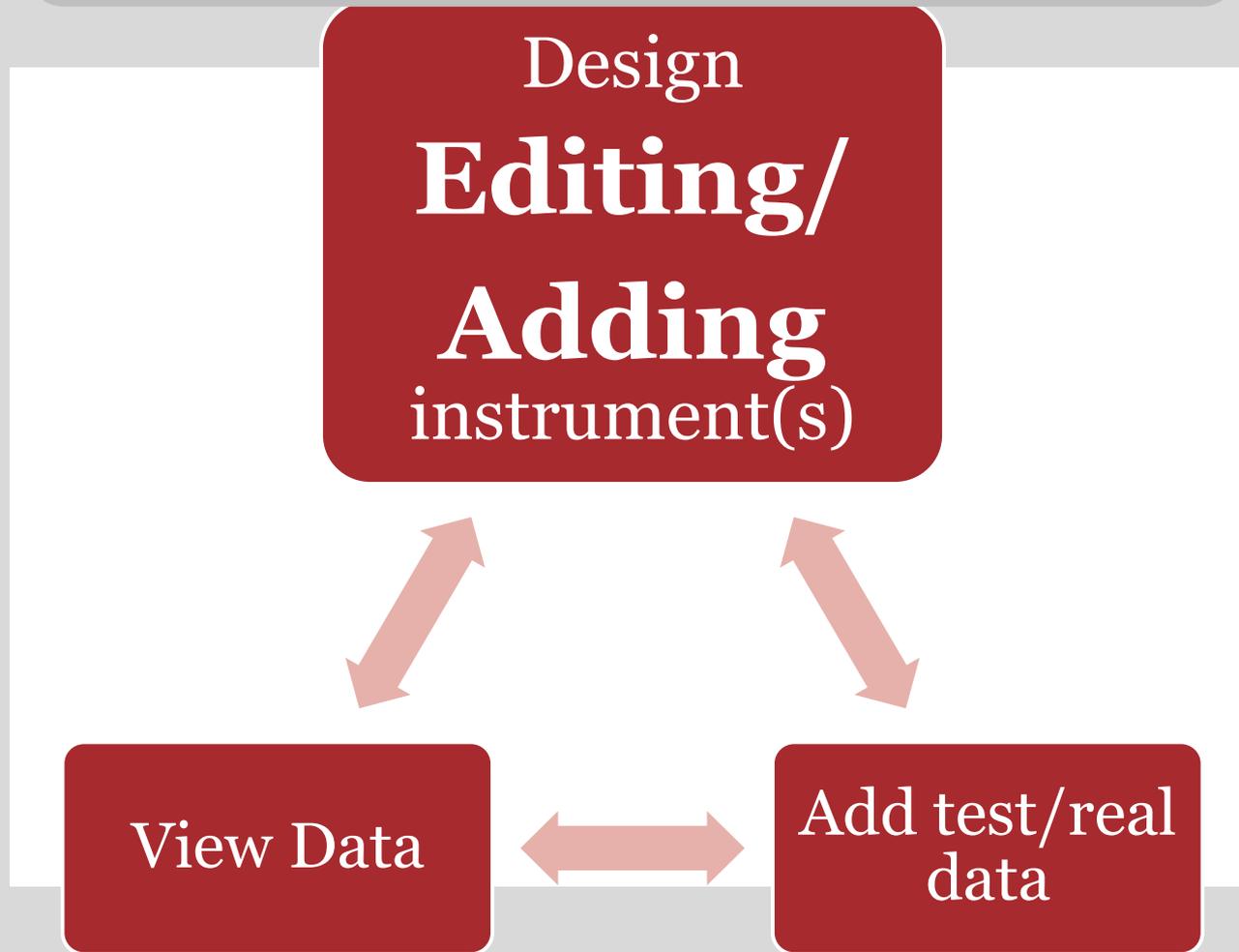
Go to [Move project to production](#)

Production mode puts into place safeguards to protect your real data against loss or damage

After moving to Production



Later stages of a project



Making changes in Production

Logged in as rc_fund | Log out

My Projects
REDCap Messenger

Project Home and Design

Project Home · Project Setup
Designer · Dictionary · Codebook
Project status: **Production**

Data Collection

Applications

Project Bookmarks Edit

Reports Search Organize Edit

Help & Information

Help & FAQ
Video Tutorials

Project Home Project Setup Online Designer Data Dictionary Codebook

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

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

Enter Draft Mode

Share your instruments with others via the REDCap Shared Library. 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. In order to make any modifications to your instruments listed below, you must first move the project into Draft Mode by clicking the 'Enter Draft Mode' button above. However, whether in Draft Mode or not, you are allowed to download the PDF or modify survey settings for any instruments below.

Submitting changes

The screenshot displays the REDCap user interface. On the left is a sidebar with navigation options: 'My Projects', 'REDCap Messenger', 'Project Home and Design', and 'Data Collection'. The 'Project Home and Design' section is expanded, showing 'Project Home', 'Project Setup', 'Designer', 'Dictionary', and 'Codebook'. The project status is 'Production'. At the top right, there are navigation buttons for 'Project Home', 'Project Setup', 'Online Designer', 'Data Dictionary', and 'Codebook'. A yellow warning banner is present, stating: 'In PRODUCTION, changes will not be made in real time. [Tell me more](#)'. Below this banner, a button labeled 'Submit Changes for Review' is highlighted with a red rectangular box. To the right of the button, the text reads: 'Fields to be added: 0 / Total resulting field count: 39' and 'Fields to be deleted: 0 / Existing field count: 39'. At the bottom of the banner, there are two links: 'Remove all drafted changes' and 'View detailed summary of all drafted changes'.

final

thoughts



Become a REDCap Mentor!

Upcoming Events – please tell your colleagues!

Name	Date	Time	Location	Registration
Put the CAP in REDCap	Thursday, May 30	9:30 am – 11:00 am	Eskind Library	Required: https://is.gd/REDCapTrainings
REDCap Basics+	Tuesday, June 4	9:30 am – 11:30 am	Eskind Library	Required: https://is.gd/REDCapTrainings
REDCap eStar Integration and Use	Friday, June 7	7-8 am OR 3-4 pm	Medical Center North	Required: http://j.mp/2RZf4Sh

Sign in if you haven't already!





These slides were adapted from a presentation developed by REDCap Administrator Julissa Acevedo of the University of Chicago and include content from REDCap administrator Jeff Hawley/Duke University