



The Basics

As of December 12, 2016

Accessing REDCap

1. To access REDCap, enter the URL into your internet browser: <https://redcap.wakehealth.edu/>
2. Login using your Medical Center ID and password
3. FAQ's and tutorial videos are available within the navigational bar by clicking on Help



Explore More at wakehealth.edu ▼



Home | Help

Welcome to REDCap

The Clinical and Translational Science Institute hosts 2 different REDCap systems, both of which serve a different purpose for our researchers. This website brings them together for you to more easily manage your projects. [Learn more about the different systems.](#)

Wake Health Users

To begin, enter your Wake Forest Medical Center username and password below.

If you do not have an @wakehealth.edu email address, please use the form to the right to access your projects.

User Name

Password

Login

Non-Wake Health Users

Enter your email address below for direct links to your projects.

Email

Proceed

Choosing the Correct System

The screenshot shows a web interface for creating a REDCap project. At the top is a navigation bar with links for Home, My Projects, Help, and Logout. Below this is the heading 'Create a REDCap Project' and a sub-heading 'Choose the right REDCap System'. A paragraph of text suggests visiting a comparison page or emailing support if there are questions. Two columns are presented: 'REDCap External' and 'REDCap Internal'. The External column lists two conditions: IRB approval for external collaborators and public surveys outside the network. The Internal column lists 'All other projects'. Each column has a corresponding 'Use REDCap' button. A footer note explains that Reynolda Campus is not part of the Wake Forest network and requires specific access.

Home | My Projects | Help | Logout

Create a REDCap Project

Choose the right REDCap System

If you have any questions about which system to use, please visit our [REDCap System Comparison](#) page or [email us](#).

REDCap External

- Your project has been approved by the IRB, and you will work with collaborators outside of the Wake Forest Baptist Health network ¹
- You have a public survey that will be completed outside of the Wake Forest Baptist Health network ¹

Use REDCap External

REDCap Internal

- All other projects

Use REDCap Internal

¹Reynolda Campus is not part of the Wake Forest Baptist Health network. Users from Reynolda Campus must have a Wake Forest Baptist Health login and VPN or Portal access.

- To create a new project, click on the *My Projects* tab then *New Project*. Navigate through the *REDCap Usage Agreement* to the System selection:
 - Internal System** - Internal projects that will be accessed only on the Wake Forest network.
 - External System** - Projects to be accessed outside of the Wake Forest network.
(For example, surveys that will be emailed to participants.)
- The *REDCap System Comparison* hyperlink will provide additional detail on the available systems.

Create a New Project

1. Enter a Title and Brief Description of the Project
2. Select the appropriate purpose for the Project
 - *Practice / Just for Fun* allows a user to enter practice projects
 - *Research* is for projects that have or will be receiving IRB approval. Additional fields will display with regards to the Principal Investigator, IRB Number, and Research Type
 - *Operational Support, Quality Improvement, and Other* are additional choices for operational-type tracking
3. Select a template type or create an empty project
 - *Templates* allow the user to add or remove fields from instruments created by REDCap. *Templates* are available for surveys, data collection forms, and other settings. A template may be customized with specific fields for a project.
 - *Create an empty project* allows the user to build their own instruments/fields.

Home | My Projects | Help | Logout

Create a REDCap External Project

You chose **REDCap External**

Now we'll set up the project within REDCap and make sure that you chose the right system. Please note that all fields are required.

Project Title

Brief Description

What is the purpose of this project?

Start project from scratch or begin with a template?

Use a template (choose one below)
 Create an empty project (blank slate)

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

Select Template	Template Title	Template Description
<input checked="" type="radio"/>	Basic Demography	Contains a single data collection instrument to capture basic demographic information.

Navigation (Tool) Bar

Once the project has been created, the Navigation (Tool) Bar will appear on the left side of the page.

Section 1:

- My Projects, Project Home, and Project Setup allow the user to navigate quickly to the major functionality of the project.
- Notifies the user of the project status.

Section 2 (Data Collection):

- Allows the user to enter new records or navigate to the existing records.
- Allows the user to edit the instruments, if still in development mode.
- Data Collection Instruments will appear as they are created.
- If the survey functionality has been enabled, a Manage Survey Participants hyperlink will appear. This is the location of the general survey link.

Section 3 (Applications):

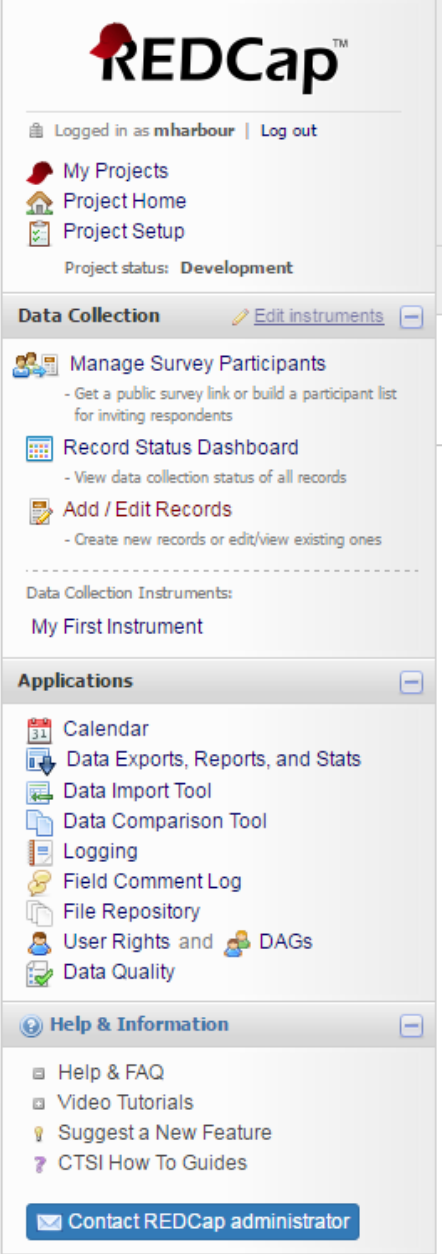
- Allows the user to navigate to the data export and reporting functionality as well as the User Rights section.

Section 4 (Reports)

- Custom reports created by a user (no reports in the screenshot to the right)

Section 5 (Help & Information)

- Tutorials and FAQs are available to users.



The screenshot displays the REDCap navigation bar. At the top, it shows the REDCap logo and the user's login status: "Logged in as mharbour | Log out". Below this, there are three main navigation options: "My Projects" (with a red cap icon), "Project Home" (with a house icon), and "Project Setup" (with a checklist icon). The current project status is "Development".

The "Data Collection" section is expanded, showing "Edit instruments" and a list of tools: "Manage Survey Participants" (with a group of people icon), "Record Status Dashboard" (with a calendar icon), and "Add / Edit Records" (with a document icon). Below this, it lists "Data Collection Instruments" with "My First Instrument".

The "Applications" section is also expanded, listing various tools: "Calendar", "Data Exports, Reports, and Stats", "Data Import Tool", "Data Comparison Tool", "Logging", "Field Comment Log", "File Repository", "User Rights and DAGs", and "Data Quality".

The "Help & Information" section is expanded, listing "Help & FAQ", "Video Tutorials", "Suggest a New Feature", and "CTSI How To Guides". A "Contact REDCap administrator" button is located at the bottom of the bar.

Project Home

The *Project Home* tab includes a **Quick Tasks** section with short-cut icons for frequently used REDCap tools.

The **Project Dashboard** lists the current users associated with the project, any upcoming calendar events that have been added, and basic project statistics.

The screenshot displays the REDCap Project Home interface. At the top, there are four navigation tabs: "Project Home" (selected), "Project Setup", "Other Functionality", and "Project Revision History". Below the tabs is a "Quick Tasks" section with a red header. It contains eight task cards, each with an icon and a description: "Codebook", "Export data", "Create a report", "Check data quality", "User Rights", "Online Designer and Data Dictionary Upload", "Copy this project", and "Data Access Groups". Below this is the "Project Dashboard" section, also with a red header. It includes a paragraph of text and three main components: a "Current Users" table, a "Project Statistics" table, and an "Upcoming Calendar Events" table. The "Current Users" table shows one user with an expiration of "never". The "Project Statistics" table shows 0 records, most recent activity on 08/10/2015 at 2:52pm, 0.00 MB space usage, and a "Development" project status. The "Upcoming Calendar Events" table shows no events for the next 7 days.

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

Quick Tasks

- Codebook**: The Codebook is a human-readable, read-only version of the project's Data Dictionary and serves as a quick reference for viewing field attributes.
- Export data**: Export your data from REDCap to open or view in Excel or various stats packages.
- Create a report**: Build custom reports for quick views of your data, and export reports to Excel/CSV.
- Check data quality**: Build or execute data quality rules to find discrepancies and errors in your project data.
- User Rights**: Grant new users access to this project or modify user privileges for current users.
- Online Designer and Data Dictionary Upload**: Create new fields/questions on your data collection instruments or modify existing ones using the Online Designer or by uploading a Data Dictionary. Quick link: [Download the current Data Dictionary](#)
- Copy this project**: Create an exact duplicate of this project, which copies over all data collection instruments, any surveys that exist, as well as the option to copy all users and reports to the new project.
- Data Access Groups**: Create groups of users to limit user access to certain records/responses, in which only users within a given Data Access Group can access records created by users within that group.

Project Dashboard

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

Current Users	
User	Expires
	never

Project Statistics	
Records in project	0
Most recent activity	08/10/2015 2:52pm
Space usage for docs	0.00 MB
Project status	Development


Upcoming Calendar Events (next 7 days)		
Time	Date	Description
		No upcoming events

Project Setup

The *Project Setup* tab contains progress tools to assist in designing a project.

Project Home Project Setup Other Functionality Project Revision History

Project status: Development Completed steps 0 of 7





Not started

I'm done!

Main project settings

Use longitudinal data collection with repeating forms? [?](#)

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



Not started

I'm done!


Design your data collection instruments

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

Go to 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?



Optional

I'm done!


Enable optional modules and customizations

Auto-numbering for records [?](#)

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

Randomization module [?](#)

Designate an email field to use for invitations to survey participants [?](#)




Optional

I'm done!

Set up project bookmarks (optional)

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

Go to



Optional

I'm done!

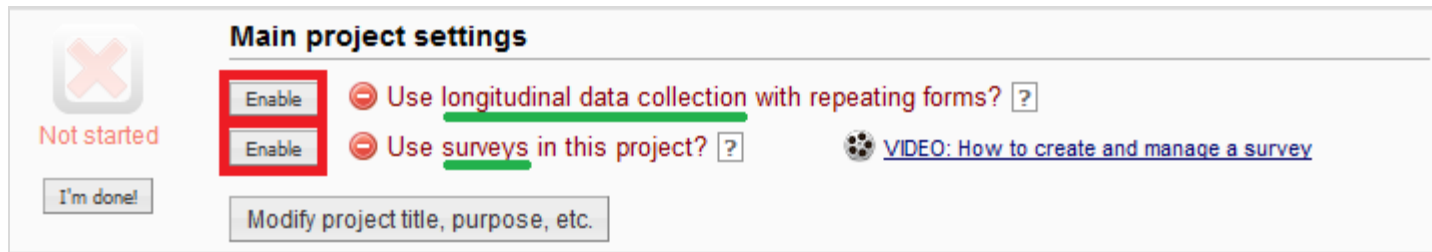
User Rights and Permissions

You may grant other users access to this project or edit the user privileges of current users on this 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

Project Setup - Main Project Settings

- Enabling **surveys** allows the user to send a form/questionnaire via email or post as a link. Additional information regarding surveys will follow later in the presentation.
- Enabling **longitudinal data collection** will allow the user to utilize the same form(s) at multiple events (time points).
 - For example, a user may create a demographics form which would be used at Baseline. The project may also include questionnaires that would be used at Events 1, 2, and 3. If a form will be used multiple times for a participant, enabling longitudinal data collection is beneficial.
 - When the longitudinal data collection is enabled, the user will have a step on their project setup screen that will allow the user to define their events and subsequently designate the forms to be used at each event.
 - ❖ When defining events, the user will be able to add event names.
 - ❖ Once the user has defined the events, they must then designate instruments for the events. This process includes checking the boxes for the forms to be included within an event. If a box is not checked for a form, then the form will not appear when entering data. Each form must be attached to at least one event.



Main project settings

Not started

I'm done!


Enable Use longitudinal data collection with repeating forms? ?

Enable Use surveys in this project? ?

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

Modify project title, purpose, etc.

Project Setup - Designing the Data Collection Instruments



Not started

[I'm done!](#)

Design your data collection instruments

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


Go to [Online Designer](#) or [Data Dictionary](#)


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

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

Three sources for creating the Data Collection Instruments:

- The Online Designer is a simple way to develop project questions from scratch. The user can select how the questions are formatted, etc. Creating the questions using the Online Designer is covered in the subsequent slides.
- A Data Dictionary is an Excel version of the forms. This option is most effective when the user has already created forms within REDCap that will be used for multiple projects. The Data Dictionary can be downloaded from one project and then uploaded into another project. REDCap will use the data dictionary to create the forms and questions within the project.
- The REDCap Shared Library contains pre-designed forms that a user can download into their project. The REDCap Consortium adds to and updates the Shared Library.

 Online Designer

 Data Dictionary

[REDCap Shared Library](#)

Creating/Editing Data Collection with the Data Dictionary Upload

- The Data Dictionary allows a user to upload previously created forms into other REDCap projects.
- The Data Dictionary files must be saved in the CSV format.
- If it is a new project and you have not created any fields, then the Data Dictionary upload will create the fields.
- If the project has existing forms, this will replace anything you may have previously created within the project.
- To add a form to what is already existing within REDCap, first download the data dictionary of the current project. Second, merge the excel files to include what is already in your project and the new forms you want to add. Third, upload the newly created file. Note the message that is prompted after the new file has been uploaded. The message will alert the user of how many fields are being added.

Design your data collection instruments & enable your surveys

Add or edit fields on your data collection instruments (survey and forms). This may be done by either using the Online Designer (online method) or by uploading a Data Dictionary (offline method), in which you may use either method or both. You may then enable your instruments to be used as surveys in the Online Designer. 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?

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

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

This module may be used for making changes to the project, such as adding new fields or modifying existing fields, by using an offline method called the Data Dictionary. The Data Dictionary is a specifically formatted CSV (comma delimited) file within which you may construct your project fields and afterward upload the file here to commit the changes to your project.

Click the 'Browse' or 'Choose File' button below to select the file on your computer, and upload it by clicking the 'Upload File' button. Once your file has been uploaded, changes will NOT immediately be made but will be displayed and checked for errors to ensure that all the formatting in your Data Dictionary is correct before official changes are made to the project.

Need some help?

If you wish to view an example of how your Data Dictionary may be formatted, you may download the [Data Dictionary demonstration file](#), or you may view the [Data Dictionary Tutorial Video \(10 min\)](#). For help setting up your Data Dictionary, you may also see the instructions listed on the [Help & FAQ](#).

Steps for making project changes:

- 1.) [Download the current Data Dictionary](#)
- 2.) Edit the Data Dictionary (see the [Help & FAQ](#) for help)
- 3.) Upload the Data Dictionary using the form below
- 4.) The changes will be made to the project after the Data Dictionary has been checked for errors

Upload your Data Dictionary file (CSV file format only)

No file chosen

Choose the file and upload. The system will alert the user if there are any errors that need to be fixed and how many fields will be replaced, if any.

Data Dictionary Upload

- The message below will display once the user has uploaded a csv file containing a data dictionary.
- In this example, the data dictionary upload contained two new forms with 50 fields. The project already contained two forms with 12 fields. The notice below indicates the two forms with 12 fields will be replaced by the two new forms and 50 fields. If the results are accurate, then select the button to commit the changes.

Project Setup Online Designer Data Dictionary

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

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

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

- No errors or warnings were found in the document.
- The uploaded data dictionary **contains 50 fields**, which will replace the 12 fields that currently exist in the project (excluding 'Form Status' fields, which are automatically generated by REDCap).

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

Commit Changes


This box will alert the user to what is being replaced. If this is a new project without pre-existing forms, then the value will be 0 fields. If the user is adding or amending the project, ensure the values are correct (as in the example presented).

(If you are only adding additional forms, make sure the data dictionary contains more fields than the current project.)

* It is very important to always include what is currently in your project along with additions and corrections you have made in the data dictionary when uploading.

Creating/Editing Data Collection Instruments with the Online Designer

Online Designer



Not started

Design your data collection instruments

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

Go to 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?

Create, Edit, and Print Data Collection Instruments/Forms

Data Collection Instruments

Add new instrument:

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

Instrument name	Fields	View PDF	Instrument actions
Demographics 	6		<input type="button" value="Choose action"/> <ul style="list-style-type: none"><input type="button" value="Rename"/><input type="button" value="Copy"/><input type="button" value="Delete"/><input type="button" value="Download instrument ZIP"/>

To edit an existing data collection instrument

Modify Data Collection Instruments

From the Online Designer tab, the user will click on the pencil icon to edit the Instruments.

Note: The first field on the first form will be the Record ID. This field is an identifier that will connect all the instruments to a single participant/record. You cannot delete this field or move it to another location within the instrument.

The user may add questions to the form by choosing Add Field.

Data Collection Instruments

Add new instrument:

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

Instrument name	Fields	View PDF	Instrument actions
Demographics	6		Choose action ▾

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

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

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](#)

Essential Steps for Creating a new Field

Field Type: **1a** --- Select a Type of Field ---

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

Add New Field

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

1 Field Type: Text Box (Short Text)

2 Field Label

3 Variable Name (utilized during data export)

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

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

-- or --

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

-- choose ontology to search --

Required?* No Yes
* Prompt if field is blank

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

Custom Alignment Right / Vertical (RV) ▾
Align the position of the field on the page

Field Note (optional)

Small reminder text displayed underneath field

Field Annotation [Learn about Action Tags](#)

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

Save **Cancel**

1. FIELD TYPE: The field type is the style of question to be asked. **1a** reflects the drop-down options.
2. FIELD LABEL: The question to be asked on the Instrument. For example, "What is your gender?"
3. VARIABLE NAME: This field is used for advanced functionality, data exports, and reporting. Variable names cannot be duplicated or begin with a number. The variable name is limited to 26 characters. An example variable name would be 'gender'.

Customizing Steps for Creating a New Field

4a

Validation? (optional) ---- 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
- Letters only
- Number
- Number (1 decimal place)
- Number (2 decimal places)
- Number (3 decimal places)
- Number (4 decimal places)
- Phone (North America)
- Social Security Number (U.S.)

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)

Field Label [How to use Piping](#)

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

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

-- or --

Enable searching within a biomedical ontology [?](#)
-- choose ontology to search --

Required?* No Yes
* Prompt if field is blank

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

Custom Alignment Right / Vertical (RV)
Align the position of the field on the page

Field Note (optional)
Small reminder text displayed underneath field

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

Save Cancel

4. **VALIDATION:** The validation option is only available for Text Box field types. This allows you to validate the response for a date, time, number, integer, email, phone number, or zip code (options listed in 4a). Minimums and maximums are also an available feature within validation. This ensures accurate responses and is highly recommended if it is applicable to your question.
5. **REQUIRED:** If a field is designated as “Required?”, REDCap will prompt a notification if the question is not answered. Survey respondents will NOT be able to submit their survey without answering required fields, although the data they entered will be saved.
6. **IDENTIFIER:** If the question is one of the 18 HIPAA identifiers, the user must select “yes” that it is an identifier. This also allows for exporting of de-identified information.
7. **CUSTOM ALIGNMENT:** Allows the user to choose how the question is positioned within the Instrument.
8. **FIELD NOTE:** A small reminder that will display underneath the answer options.
9. **FIELD ANNOTATION:** Can be used to add explanatory notes or commentary about a given field. Can also use action tags. This field is not displayed on a page, it is merely for reference.

Customizing Steps for Creating a New Field

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) ▼

Question Number (optional)
Displayed only on the survey page

Field Label [How to use Piping](#)

Variable Name (utilized during data export)

ONLY letters, numbers, and underscores

Enable auto naming of variable based upon its Field Label?

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  icon for this field after clicking the Save or Cancel button below.

Save **Cancel**

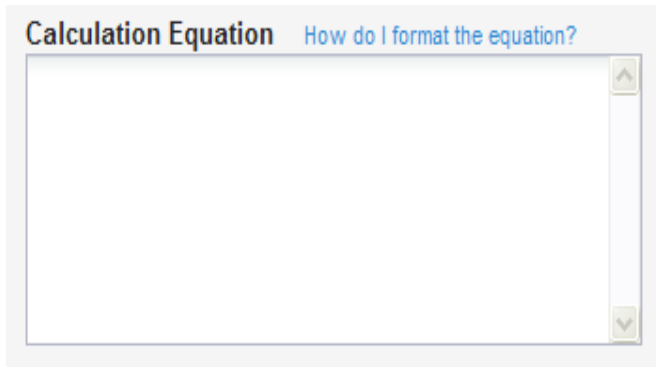
10

10. **QUESTION NUMBER:** If the Instrument is a survey and the user has selected custom question numbering within survey settings, then the user also has the option to assign a number to the field. The assigned number will only display on public surveys. **The numbers do not adjust for branching logic.**

Additional Steps for Calculated Field

In addition to the fields that were discussed on the *Essential Steps and Customizing Steps for Creating a New Field* slides, the following field information is required for a Calculated Field:

Calculated Field:



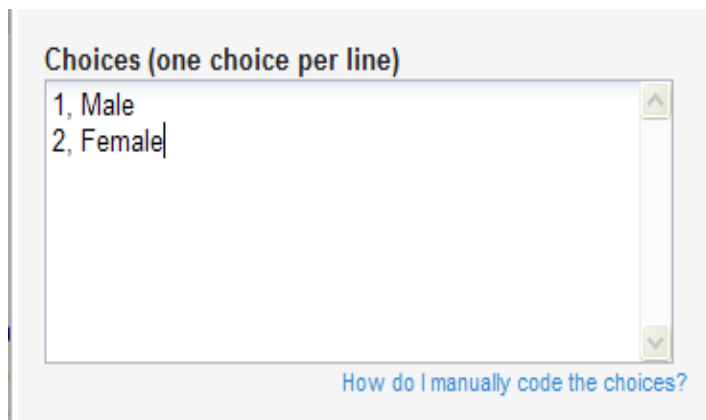
The image shows a user interface element for entering a calculation equation. It consists of a text input area with a light blue border. Above the input area, the text "Calculation Equation" is displayed in a bold font, followed by a smaller, blue, clickable link that says "How do I format the equation?". The input area itself is currently empty and has a vertical scrollbar on the right side.

- The user will be required to enter a calculation using variable names in the correct order of operations.
- To get started with formatting the equation, select the link 'How do I format the equation?'
- This field can be used for basic calculations (ex: calculating a person's BMI), but can also be used to determine a score based on respondents' answers.
- Calculated fields will also do rounding, date differencing, and conditional logic.
- Ex: calculating BMI →
$$[\text{weight}] * 10000 / ([\text{height}] * [\text{height}])$$

Additional Steps for Multiple Choice and Checkboxes

In addition to the fields that were discussed on the *Essential Steps and Customizing Steps for Creating a New Field* slides, the following field information is required for a Multiple Choice or Checkbox Field:

Multiple Choice and Checkboxes:



Choices (one choice per line)

1, Male
2, Female

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

- List each answer option on a separate line.
- REDCap will automatically assign a coded value to the answer options.
- If the user has specific values they would like assigned to an answer, the user may manually enter them. An explanation of how to manually code is available in the *'How do I manually code the choices?'* link.
- While the two multiple choice options (radio button and drop-down list) only allow for one response, the checkbox option allows the respondent to select multiple answers.

Additional Steps for Slider / Visual Analog Scale

In addition to the fields that were discussed on the *Essential Steps and Customizing Steps for Creating a New Field* slides, the following field information is required for a Slider /Visual Analog Scale Field:

Slider / Visual Analog Scale:

Labels displayed above slider:

Left-hand label (if any):

Middle label (if any):

Right-hand label (if any):

Display number value (0-100)?

- Produces a slider mechanism that is similar to an “Agree or Disagree” style question. Respondents can slide the bar to the appropriate location to answer the question.
- REDCap will assign this a value from 0 to 100 in the system background; however, if the user would like for this value to be displayed, then select the option to ‘Display number value (0-100)?’
- Labels can be added to appear above the slider mechanism. Labels aid the respondent in knowing how their response is defined.

Additional Features – Descriptive Text Field

- The Descriptive Text Field Type allows the user to insert extra instructions within their form. This also allows the user to attach an image, file, or embedded audio or video.
- If a file is attached, REDCap will include a link for the respondent to open and view the file.
- If an image is attached, REDCap gives the user the option to include a link, but it also gives them the option to display it as an inline image. If the user selects the inline image option, the image will appear within REDCap (the respondent will not need to open an attachment).

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:

Field Label [How to use Piping](#)

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

Optional file attachment, image, audio, or video:

Embed an external video (provide video URL) [?](#)

e.g. <https://youtube.com/watch?v=E1cCuWMUpz0>,
<https://vimeo.com/62730261>, <http://example.com/movie.mp4>

Display format of video: Inline Inside popup

– or –

Attach an image, file, or embedded audio

[Upload document](#)

Display format of attachment on page:

Link
 Inline image
 Audio file (play in embedded player on page)

(Images wider than 600 pixels will be downsized to fit page.)

Field Annotation [Learn about Action Tags](#)

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

VIDEOS: The user will enter the video's URL (web address) in the "Embed an external video" text box. The video can be set to full-screen mode. The video is not hosted by REDCap, but will be hosted on another server elsewhere on the web and streamed to the user's web browser. YouTube and Vimeo videos are the most compatible video streaming services.

Additional Features – Signature Field

The Signature Field allows a participant to sign with a mouse, stylus, or finger (depending on the type of computer). The signature is saved and will print on the completed form.

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:

Field Label [How to use Piping](#)

Variable Name (utilized during data export)
 Enable auto naming of variable based upon its Field Label?
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

Field Note (optional)

Small reminder text displayed underneath field

Field Annotation [Learn about Action Tags](#)

Explanatory notes - not displayed on any page

Signature

Add signature

Signature (signature)

SIGN HERE

[reset](#)

Signature or


signature_2015-10-13_1147.png (0.01 MB)

Matrix of Fields

Please let us know your weekly schedule for the following:

	Monday	Tuesday	Wednesday	Thursday	Friday
6) Gym (Weight Training)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7) Aerobics					
8) Eat Out (Dinner/Lunch)					
9) Drink (Alcoholic Beverages)					

Matrix Header Text (optional)

Please provide the patient's weekly schedule for the activities below.

Matrix Rows Enable auto naming of variable based upon its Field Label?

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

Field Label	Variable Name <small>ONLY letters, numbers, and underscores</small>	Question Number <small>(optional)</small>	Required?*
Gym (Weight Training)	gym		<input type="checkbox"/> ❌
Aerobics	aerobics		<input type="checkbox"/> ❌
Eat Out (Dinner/Lunch)	eat		<input type="checkbox"/> ❌
Drink (Alcoholic Beverages)	drink		<input type="checkbox"/> ❌
<input type="button" value="Add another row"/>			

Matrix Column Choices

Choices (one choice per line)

0, Monday
1, Tuesday
2, Wednesday
3, Thursday
4, Friday

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

Other Matrix Info

Answer Format:
Multiple Answers (Checkboxes) ▼

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

Matrix group name: ONLY letters, numbers, and underscores
weekly_schedule [What is a matrix group name?](#)

The field labels will be the items listed in the rows of the matrix

These will display as columns in the matrix

REDCap can display a matrix group of fields as either Single Answer (Radio Buttons) or Multiple Answers (Checkboxes).

1. To start click the "Add Matrix of Fields" button that will appear either above or below each field.
2. If desired, provide a text in the "Matrix Header Text (optional)" box to display a section header above the matrix.
3. Provide the field label and variable name for each field in the matrix. Assign a question number and designate a question as a required field, if needed.
4. Designate the matrix choice columns in the "Matrix Column Choices" box. Then set the answer format for the matrix, either Single Answer (Radio Buttons) or Multiple Answers (Checkboxes).
5. Provide a matrix group name for your matrix of fields. The matrix group name is a tag that is used to group all the fields together in a single matrix group.

Begin New Section


- The Begin New Section Field Type allows the user to create headers within the Instrument. The headers will appear in a different color.
- An option exists for the survey functionality, which allows the Begin New Section field type to indicate a new page of questions.
- To add a section header, the user must first create their next field. Once that field is created, return to the place where the header is to be located and then add the new field.

Edit Field [Close]

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 \(4 min\)](#).

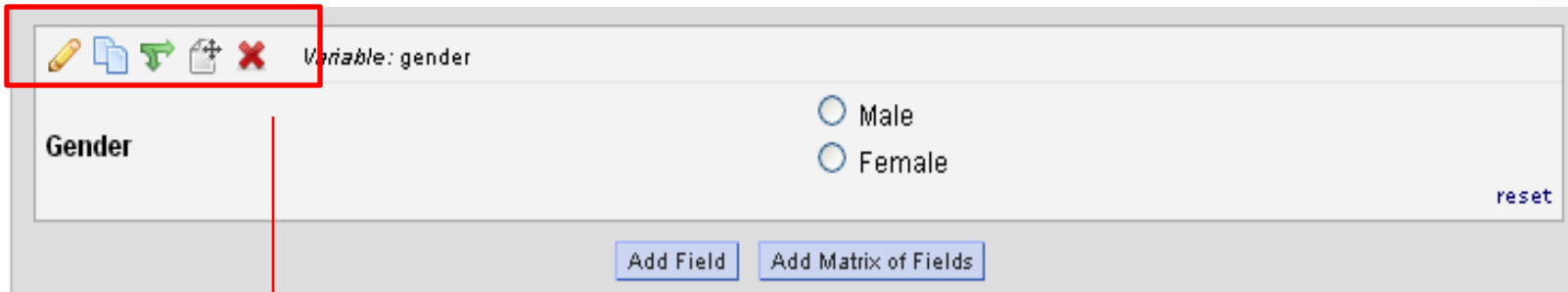
Field Type:

Field Label [How to use Piping](#)

 **New Section for this Instrument**






Tool Options after a Question is Created

- Once a question is created, the question box contains Question Tools. As seen in the image below, a user can edit the question once it has been created.



The screenshot shows a question editor interface. At the top, there is a toolbar with five icons: a pencil (edit), two overlapping pages (copy), a green arrow pointing right (branching logic), a document with a plus sign (move), and a red X (delete). These icons are highlighted with a red box. Below the toolbar, the question text 'Gender' is displayed on the left, and the variable 'Variable: gender' is on the right. The question content consists of two radio button options: 'Male' and 'Female'. A 'reset' button is located at the bottom right of the question area. Below the question area, there are two buttons: 'Add Field' and 'Add Matrix of Fields'.

Question Tools:

-  Edit the question
-  Copy the question
-  Add Branching Logic to the question (demonstrated on next slide)
-  Move the question to a new form or different place on the same form
-  Delete the question

Practice

creating a project and adding fields to an instrument

Branching Logic

With branching logic, the creator can choose between two different methods:

- The Drag-N-Drop Logic Builder is automatically selected. This method makes it very simple to apply branching logic to the form, although only less complex branching logic is available this way.
- With the Advanced Branching Logic Syntax, the creator will have to enter a specific formula for branching logic. Complex branching logic can be developed utilizing this tool. Notice the [How do I use the advanced Syntax?](#) tutorial hyperlink.

If advanced branching is not required, it is recommended to utilize the Drag-N-Drop Logic Builder to reduce error when adding branching logic.

Choose method below for the following field: **are_you_pregnant** - *Are you pregnant?*

Advanced Branching Logic Syntax [\(How do I use the advanced syntax?\)](#)

Show the field ONLY if...

[gender] = '1'

[Clear logic](#)

- Basic format for Logic Syntax: [variable name] = "coded value"
- The above example shows [gender]="1" which means "Are you pregnant?" will only be displayed if the response to "What is your gender?" is '1, Female'

Drag-N-Drop Logic Builder

Field choices from other fields
(drag a choice below to box on right)

- participant_id = (define criteria)
- gender = Female (1)
- gender = Male (2)
- survey_complete = Incomplete (0)
- survey_complete = Unverified (1)
- survey_complete = Complete (2)

Show the field ONLY if...

ALL below are true
 ANY below are true

gender = Female (1)

[Clear logic](#)

Choose between ALL or ANY responses dragged below are true

Correct field choice is moved to the logic field

This example shows that the question "Are you pregnant?" will only be asked if someone answers "Female" to the question "What is your gender?"

Includes all possible answer choices

Practice

branching logic

Project Setup - Enable the Survey Functionality

- If the instruments/forms need to become surveys, the user will need to enable the use of surveys in the project. Clicking enable surveys will allow you to then designate which forms will be used as surveys.

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

Project status: Development Completed steps 0 of 7

Main project settings

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

Use longitudinal data collection with repeating forms? [?](#)

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

Main project settings

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

Use longitudinal data collection with repeating forms? [?](#)

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

Online Designer – Survey Functionality

- Once the survey functionality has been enabled on the Project Setup tab, navigate to the Online Designer tab to enable the survey functionality on a particular instrument.
- Survey Options:
 - ❖ Survey Settings – allows the user to customize the survey including title, directions, automatically numbering.
 - ❖ Automated Invitations – allows the user to set up survey invitations and have them sent automatically depending on specified conditions.
 - ❖ Survey Notifications – allows the user to select a user of the project to be notified via email every time a survey is completed. Multiple people may be selected.

The screenshot shows the 'Data Collection Instruments' section with a table listing instruments. The 'Survey options' section includes 'Survey Queue', 'Survey Login', and 'Survey Notifications'. The 'Add new instrument' section has 'Create' and 'Download' buttons. Below the table are navigation tabs: 'Project Setup', 'Online Designer', and 'Set Up My Survey'.

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Enrollment Information	17		<input type="button" value="Enable"/>	<input type="button" value="Rename"/> <input type="button" value="Delete"/>	
Monthly Visit Form	9		<input type="button" value="Enable"/>	<input type="button" value="Rename"/> <input type="button" value="Delete"/>	

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

The dialog box is titled 'Set up my survey for data collection instrument "Enrollment Information"'. It has a 'Cancel' button. Under 'Survey Design Options:', the 'Survey Title' is set to 'Enrollment Information'. A note below the title reads: 'Title to be displayed to participants at the top of the survey page'.

Complete the Survey Design Options and click Save.

This screenshot shows the 'Data Collection Instruments' table with annotations. A purple oval highlights the 'Survey Notifications' button in the 'Survey options' section. Another purple oval highlights the 'Survey settings' and '+Automated Invitations' buttons in the 'Survey-related options' column of the table. The 'Enrollment Information' row shows a green checkmark in the 'Enabled as survey' column.

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Enrollment Information	17		<input checked="" type="checkbox"/>	<input type="button" value="Rename"/> <input type="button" value="Delete"/>	<input checked="" type="button" value="Survey settings"/> <input type="button" value="+Automated Invitations"/>
Monthly Visit Form	9		<input type="button" value="Enable"/>	<input type="button" value="Rename"/> <input type="button" value="Delete"/>	

User Rights and Permissions

Basic Rights

Highest level privileges:

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

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

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

Other privileges:

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

Settings pertaining to project records: [Explain these settings](#)

- Create Records
- Rename Records
- Delete Records

Settings pertaining to record locking and E-signatures:

- Record Locking Customization
- Lock/Unlock Records
 - Disabled
 - Locking / Unlocking
 - Locking / Unlocking with E-signature authority
 - [What is an E-signature?](#)
- Users with locking privileges also have access to the E-signature and Locking Mgmt page on the left-hand Applications menu.
 - [Watch video about locking](#)
- Allow locking of all forms at once for a given record?

Data Entry Rights

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

	No Access	Read Only	View & Edit	Edit survey responses
Demo Demographics Form (survey)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>
Monthly Clinical Data (survey)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>
Completion Data	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>

The Basic Rights tab allows the user to customize rights for each user in the project.

- User Rights is an application on the left side toolbar and also a step in the Project Setup screen that allows a user to add additional users to the project.
- Only users with a MEDCTR ID can be added to your project. If you need to add an outside user you must request that they get a username from the CTSI REDCap Team by using the “External User Request Form” located on the first page after logging into REDCap.
- You can add them with specific rights such as just data entering, or just exporting data or give them a role within the project that allows them to have certain rights.

Project Setup **User Rights** **Data Access Groups**

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

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

-
- OR —
-

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

-
- (e.g., Project Manager, Data Entry Person)

To enter the Basic Rights tab, first enter a user for your project by entering only their user name (WFBH credentials).

Development to Production

Development

- All project set-up changes happen immediately
- The user can enter “test data” to test all the functionality of the project (flow of questions, branching logic, calculated fields, etc.)

Production

- Any test data that was entered during the Development stage will be deleted prior to entering the production mode.
- Project design changes can still be made; however, the changes do not happen immediately. The project is placed into a ‘Draft Mode,’ changes are made and then are submitted to the CTSI REDCap Team for review. This is to ensure that any design changes do not delete/change any real data.

Move Project To Production Status? ✕

Are you sure you wish to leave the DEVELOPMENT stage? If you proceed, the project will be moved to PRODUCTION status so that real data may be collected. If you select the 'Delete ALL data' option below, all current collected data, calendar events, and uploaded documents will be deleted, otherwise all will remain untouched as the project is moved to production.

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

Keep existing data or delete?

Keep ALL data saved so far.

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

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

To Begin the Data Collection Process

- To enter data, click the Add/Edit Records button on the left side of the screen. The project type (basic, survey, or longitudinal) will dictate a slight change in the appearance of the data entry screen.
 - ❖ The beginning of the data entry screen also has a data search feature that allows the user to search records based on the fields added to the project.
- Click on 'Add New Record' to begin entering data.

Data Collection [Edit instruments](#)

- Manage Survey Participants**
- 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 existing ones

Data Collection Instruments:
[Enrollment Information](#)
[Monthly Visit Form](#)

Total records: 4 / Total survey responses: 2 / Last survey response: 09/09/2015 4:35pm

Partial Responses (0)	-- select response --
Complete Responses (4)	-- select response --

Add new record

[Show Unverified Records above](#)

Data Search

Choose a field to search
(excludes multiple choice fields)

-- select search field --

Search query

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

Enrollment Information

Adding new Participant ID 6

Participant ID 6

What is your name?
Last Name, First Name

What is your gender?

Do you:

- Smoke
- Drink
- Neither

Data Collection Entries

Project Home
Project Setup

Data Collection

Study ID 1
Data Collection Instruments:
Demographics
Lock all forms

Data Collection

Study ID 2
Data Collection Instruments:
Demographics
Lock all forms

Applications

- Calendar
- Data Export Tool
- Data Import Tool
- Data Comparison Tool
- Logging
- File Repository
- Record Locking Customization
- E-signature and Locking Mgmt
- Graphical Data View & Stats
- Report Builder

Help & Information

- General Help
- Video Tutorials

If you are experiencing problems, please contact your [project administrator](#).

Adding new Study ID 1

Study ID 1
(To rename this record, modify the value immediately below.)

Study ID

Gender Yes No [reset value](#)

Demographics Information

First Name

Last Name

Date of Birth Today

Gender

Street, City, State, ZIP

Phone number

Form Status

Complete?

Lock this record for this form?
If locked, no user will be able to edit this record on this form someone with Lock/Unlock privileges unlocks it.

Lock

E-signature [\(What is this?\)](#)

Marking a survey incomplete, unverified, or complete allows you to keep track of the form's status for each record.

The Save or Save and Continue buttons allow you to save the data you have entered and give you options on where to go next.

Record Status Dashboard

- The Record Status Dashboard is located on the left side of the screen, above the Add/Edit Records button. This feature provides the user an overview of the records and the status of the forms or surveys.

My Projects
 Project Home
 Project Setup
 Project status: **Development**

Data Collection [Edit instruments](#)

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

Scheduling
 - Generate schedules for the calendar using your defined events

Record Status Dashboard
 - View data collection status of all records

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

Record Status Dashboard (all records)

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

Legend for status icons:

- Incomplete
- Unverified
- Complete
- Partial Survey Response
- Completed Survey Response

Displaying record "1" through "4" of 4 records

Participant ID	Pre-Screening Survey Initial Data	Participant Info Survey Initial Data	Participant Morale Questionnaire Week 1	Participant Morale Questionnaire Week 2	Participant Morale Questionnaire Week 3	Participant Morale Questionnaire Week 4	Completion Data (to be entered by study personnel only) Final Data
1	Complete	Partial Survey Response	Complete	Incomplete	Unverified	Incomplete	Incomplete
2	Incomplete	Complete	Incomplete	Incomplete	Incomplete	Incomplete	Incomplete
3	Incomplete	Incomplete	Incomplete	Incomplete	Incomplete	Incomplete	Incomplete
4	Complete	Incomplete	Incomplete	Incomplete	Incomplete	Incomplete	Incomplete

Practice

entering test data

Applications – Calendar

- An additional application associated with a Project is the Calendar.
- A user can add calendar events that are associated with their Project.
- The user can add general calendar events, but can also connect a specific calendar event with a Study ID.

The screenshot illustrates the process of adding a calendar event. On the left, the 'Applications' menu is shown with 'Calendar' highlighted by a red circle. A blue arrow points from this menu item to a calendar view for 'Wednesday' where a '+ New' button is also circled in red. A second blue arrow points from the '+ New' button to the 'Add New Calendar Event' dialog box on the right. The dialog box contains the following fields:

- Date:** 09/02/2015 (Wednesday)
- Time:** (optional) HH:MM (24-hr format)
- Notes:**
- Participant ID:** - not applicable - Select from drop-down if calendar event is for existing Participant ID


At the bottom of the dialog is an 'Add Calendar Event' button. A 'Close' button is located in the top right corner of the dialog.

Applications - Data Export Tool

Applications


- Calendar
- Data Exports, Reports, and Stats**
- Data Import Tool
- Data Comparison Tool
- Logging
- Field Comment Log
- File Repository
- User Rights and DAGs
- Record Locking Customization
- E-signature and Locking Mgmt
- Data Quality
- API

Data Exports, Reports, and Stats

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







 Create New Report

 My Reports & Exports

 PDF & 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	Report ID  (auto-generated)
A	All data (all records and fields)	 View Report  Export Data  Stats & Charts		
B	Selected instruments (all records)	 Make custom selections		
		 Create New Report		

Applications – Create New Report (within Data Export Tools)

- The Report Builder allows the user to run real-time queries of all data within the project.
- Begin by naming the report and selecting which fields to be queried. All fields within the project can be included in the report. Depending on the specific Field Type, operators and values can also be added.
- Example: You only want to view the female responses.
 - Select the field to be “What is your gender?” and change the operator to “=” and the value to “female.”
 - This will only pull responses where someone selected that they were female.
- All reports will be quickly accessible on the left-hand toolbar.
- All reports can be edited, copied, and deleted at any time. Changes will not effect any data you have collected.
- When viewing a report, it will appear in a chart format with rows and columns. All reports can be exported to Excel.

Name of Report:

STEP 1

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


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

STEP 2

 **Fields to include in report** [+ Quick Add](#)

Add all fields from selected instrument:

Field 1	<input type="text" value="record_id 'Record ID'"/>	<input type="button" value="RBD"/>	Instrument: My First Instrument	<input type="button" value="X"/>
Field 2	<input type="text" value="Type variable name or field label"/>	<input type="button" value="v"/>		

 **Additional fields to include in report** (optional)

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

STEP 3

 **Filters** (optional)

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

Filter 1 Operator / Value

 Switch format: [Use advanced logic](#)

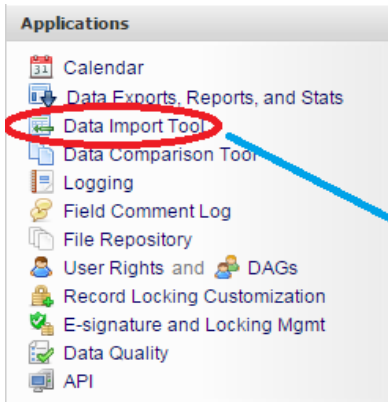
 **Live Filters** (optional)

Live Filters can be selected on the report page for dynamically filtering data in real time. Only multiple choice fields can be used as Live Filters (as well as Events, if longitudinal, and Data Access Groups, if any exist).

Live Filter 1	<input type="text" value="-- select a field --"/>
Live Filter 2	<input type="text" value="-- select a field --"/>
Live Filter 3	<input type="text" value="-- select a field --"/>

Applications – Data Import

- The Data Import Tool (located under Applications) allows the user to import data from an excel file.
- The user can locate the format and import data by downloading the data import template, adding in the data to the template, and then uploading into the project.



Instructions:

1.) Click the link below to download your data import template as a CSV (comma delimited) file. Save it locally to your computer and then open it to begin filling it with the data you wish to import.

 [Download your Data Import Template](#) (with records in rows)
OR

 [Download your Data Import Template](#) (with records in columns)

Template for
Excel format

2.) In each column of the Data Import Template file that you downloaded, place the data for each record that you wish to import. Once all your data has been added, save the file.


- Be sure not to change the Variables/Field Names in the file or an error may occur.
- Also, for all of the 'dropdown' or 'radio' fields in the project, you must make sure that the numerical value (rather than the text value) is entered in those cells, or else it cannot be processed.
- Any empty rows or columns in the file can be safely deleted before importing the file. Doing this reduces the upload processing time, especially for large projects.

3.) Click the 'Browse' or 'Choose File' button below to select the file on your computer, and upload it by clicking the 'Upload File' button.

4.) Once your file has been uploaded, the data will NOT be immediately imported but will be displayed and checked for errors to ensure that all the data is in correct format before it is finally imported into the project.

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

Format for date and datetime values:

 Upload your CSV file:

No file chosen

Upload a file with data:

- Must be CSV file
- Column headers must match variable names in project
- Only can use coded values for multiple choice questions

More Information about REDCap

For general REDCap information, visit the CTSI Website:

ctsi.wakehealth.edu/redcap

For specific questions, contact a REDCap Administrator:

ctsiredcap@wakehealth.edu