



Basic User Guide

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REDCap Overview

Logging into REDCap

Go to <https://redcap.upstate.edu>

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



Log In



Please log in with your user name and password. If you are having trouble logging in, please contact [IMT Help Desk | \(315\) 464-4115](#) | helpdesk@upstate.edu.

Username:

Password:

[Forgot your password?](#)

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

Helpful Terms

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

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

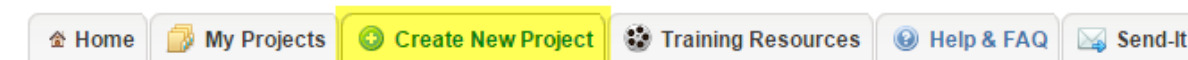
Record Status Dashboard – a table that lists all existing records and their status for every data collection instrument

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

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

Create a New REDCap Project

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



Project Title Enter a title for your project

- This can be changed later, if needed

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

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

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

Once ready, click Create Project

Home
My Projects
Create New Project
Training Resources
Help & FAQ
Send-It

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 button.

Project title:
Title to be displayed on project webpage

Purpose of this project:
(How will it be used?)

Start project from scratch or begin with a template?

Create an empty project (blank slate)

Use a template (choose one below)

★ **Choose a project template** (comes pre-filled with fields, forms/surveys, and other settings) Add templates (super user)

select template	Template title (sorted by title)	Template description
<input type="radio"/>	E-Consent - Permission but No Assent and Consent of Parent	Permission but No Assent and Consent of Parent (dependent on child's enrollment); Procedures include blood collection, randomization, survey, data collection.
<input type="radio"/>	Research Project with PHI to be Deleted Later	

Project Setup

Main project settings

Select your data collection type:

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

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

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

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

Project status: Development Completed steps 0 of 7

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.

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

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

Project status: Development Completed steps 1 of 7

Main project settings

Complete!

Not complete?

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

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

Modify project title, purpose, etc.

Design your data collection instruments

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

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

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

Project status: Development Completed steps 1 of 7

Main project settings

Complete!

Not complete?

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

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

Modify project title, purpose, etc.

Design your data collection instruments

Not started

I'm done!

Go to or

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

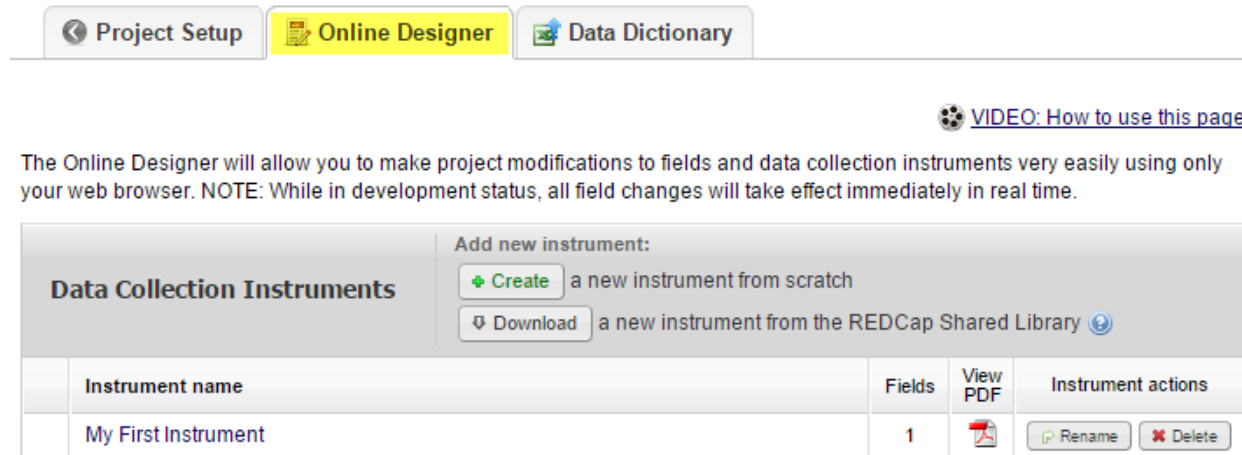
Have you checked the [Check For Identifiers](#) page to ensure all identifier fields have been tagged?

Online Designer

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

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

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



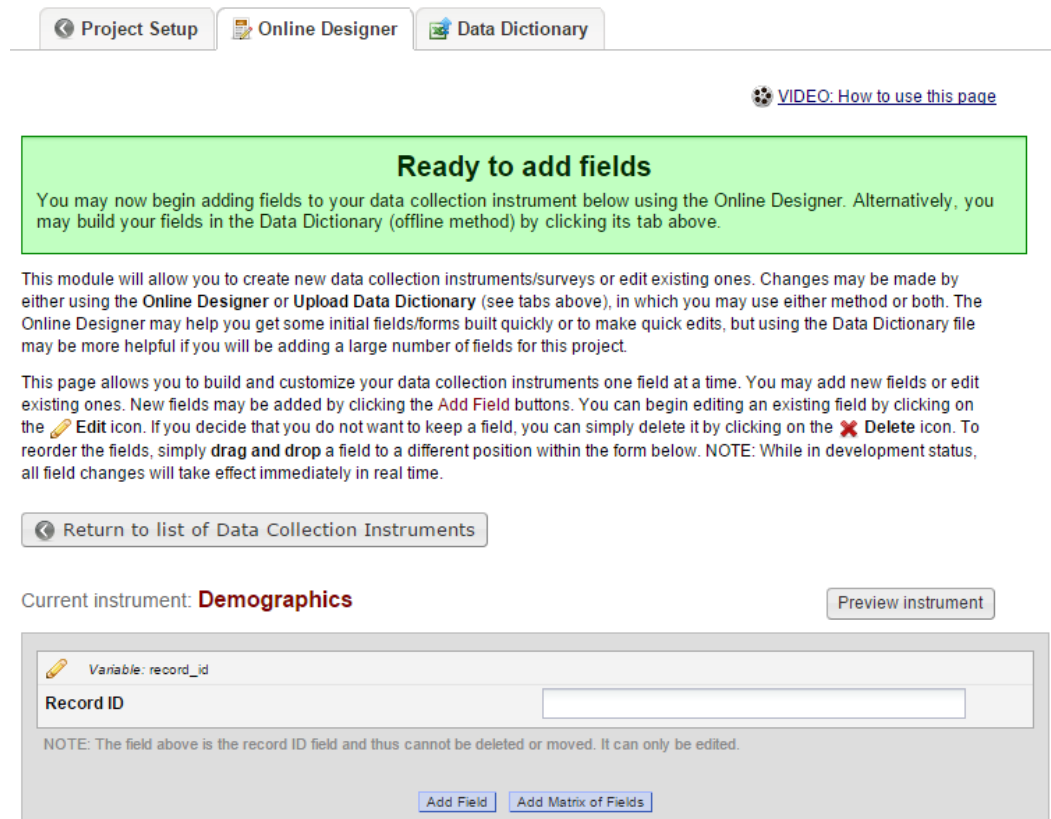
The screenshot shows the REDCap Online Designer interface. At the top, there are three tabs: 'Project Setup', 'Online Designer' (which is highlighted in yellow), and 'Data Dictionary'. Below the tabs, there is a video icon and a link: 'VIDEO: How to use this page'. The main content area is titled 'Data Collection Instruments' and contains two buttons: '+ Create' with the text 'a new instrument from scratch' and 'Download' with the text 'a new instrument from the REDCap Shared Library'. Below this is a table with the following structure:

Instrument name	Fields	View PDF	Instrument actions
My First Instrument	1		Rename Delete

Record Identifier

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

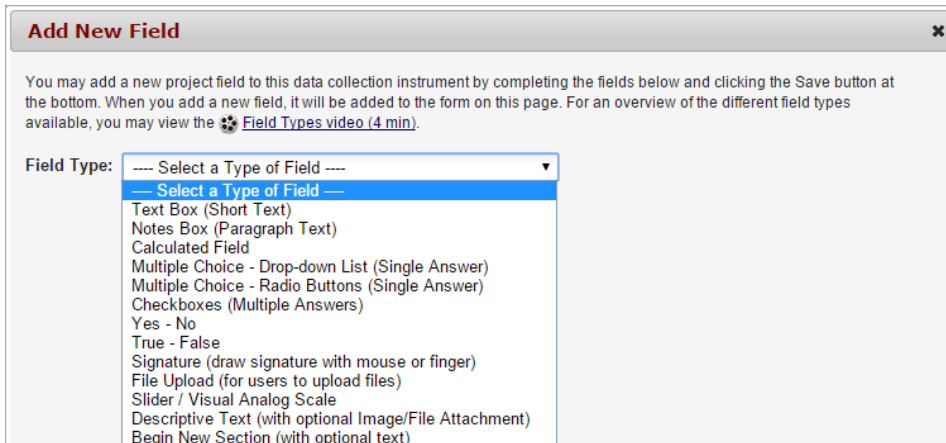
A good example of a unique record identifier would be the patient’s MRN. A bad example would be a participant’s last name since there can be several individuals with the same last name (e.g. Smith, Jones, etc.).



The screenshot shows the REDCap Online Designer interface. At the top, there are three tabs: 'Project Setup', 'Online Designer' (which is highlighted in yellow), and 'Data Dictionary'. Below the tabs, there is a video icon and a link: 'VIDEO: How to use this page'. The main content area is titled 'Ready to add fields' and contains a green box with the text: '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.' Below this is a paragraph of text: '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.' Below this is another paragraph: '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.' Below this is a button: 'Return to list of Data Collection Instruments'. Below this is a section titled 'Current instrument: Demographics' with a 'Preview instrument' button. Below this is a form with a pencil icon and the text 'Variable: record_id'. Below this is a text input field with the text 'Record ID'. Below this is a note: 'NOTE: The field above is the record ID field and thus cannot be deleted or moved. It can only be edited.' Below this are two buttons: 'Add Field' and 'Add Matrix of Fields'.

Add Fields to Your Data Collection Instruments

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



Add New Field ✕

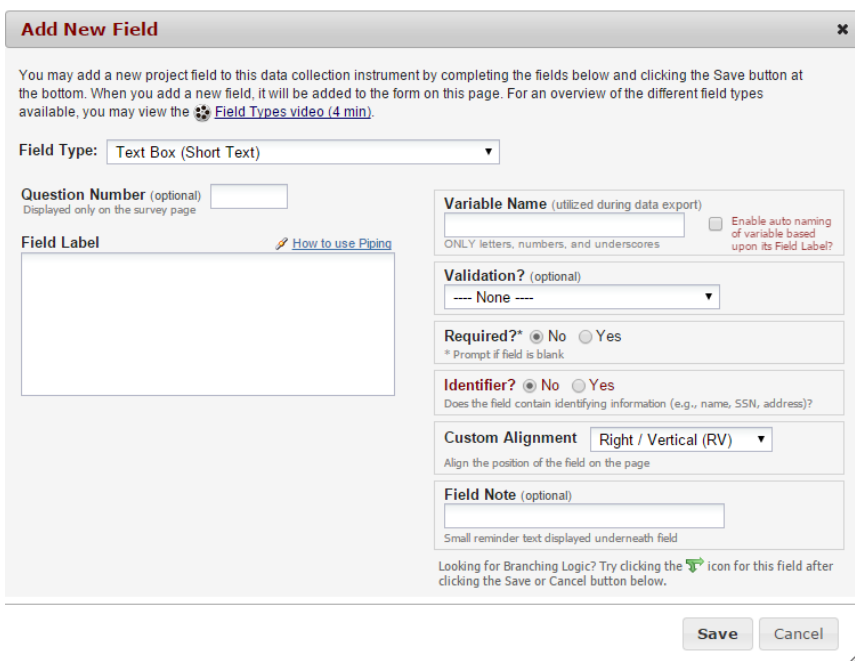
You may add a new project field to this data collection instrument by completing the fields below and clicking the Save button at the bottom. When you add a new field, it will be added to the form on this page. For an overview of the different field types available, you may view the [Field Types video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

Field Type: ---- Select a Type of Field ---- ▼

- 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/File Attachment)
- Begin New Section (with optional text)

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

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



Add New Field ✕

You may add a new project field to this data collection instrument 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) Enable auto naming of variable based upon its Field Label?
ONLY letters, numbers, and underscores


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.

Examples of field types

Text Box (Short Text)

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

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: Text Box (Short Text)

Question Number (optional)
Displayed only on the survey page

Field Label
Enter your first name: [How to use Piping](#)

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


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.

Enter your first name:

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

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

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: Text Box (Short Text)

Field Label
Date of Visit: [How to use Piping](#)

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


Validation? (optional)
Date (M-D-Y)
Minimum: 01-01-2015
Maximum: 12-31-2016

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)
Only dates between 2015-2016 are accepted
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.

Date of Visit: Today M-D-Y
* must provide value
Only dates between 2015-2016 are accepted!

Text Box (Short Text) with a validation of Email

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:

Question Number (optional)
Displayed only on the survey page

Field Label [How to use Piping](#)
Enter your email address:

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

Validation? (optional)


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

Looking for Branching Logic? Try clicking the  icon for this field after clicking the Save or Cancel button below.

Enter your email address:

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

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:

Question Number (optional)
Displayed only on the survey page

Field Label [How to use Piping](#)
What is your weight (in kg):

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

Validation? (optional)

Minimum:
Maximum:


Required?* No Yes
* Prompt if field is blank

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

Custom Alignment
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.

What is your weight (in kg):

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

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](#)
What is your age:

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

Validation? (optional)
Integer

Minimum:
Maximum:


Required?* No Yes
* Prompt if field is blank

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

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

Field Note (optional)

Small reminder text displayed underneath field

Looking for Branching Logic? Try clicking the  icon for this field after clicking the Save or Cancel button below.

Save **Cancel**

What is your age:

Notes Box (Paragraph Text)

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: Notes Box (Paragraph Text)

Question Number (optional)
Displayed only on the survey page

Field Label [How to use Piping](#)
List all 31 flavors of ice cream that Baskin Robbins sells

Variable Name (utilized during data export)
flavors 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 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**

List all 31 flavors of ice cream that Baskin Robbins sells

Expand

Calculated Field

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

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:

Question Number (optional)

Displayed only on the survey page

Field Label [How to use Piping](#)

Calculation between Start Time and End Time (in hours)

Calculation Equation [How do I format the equation?](#)

`datediff([end_time],[start_time],"h")`

Variable Name (utilized during data export)

Enable auto naming of variable based upon its Field Label?

Required?* No Yes

* Prompt if field is blank

Identifier? No Yes

Does the field contain identifying information (e.g., name, SSN, address)?

Custom Alignment

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.

Calculation between Start Time and End Time (in hours)

[View equation](#) [Disclaimer](#)

Multiple Choice – Drop Down List (Single Answer)

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

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:

Question Number (optional)

Displayed only on the survey page

Field Label [How to use Piping](#)

What is your favorite flavor of ice-cream?

Variable Name (utilized during data export)

Enable auto naming of variable based upon its Field Label?

Required?* No Yes

Raw values for choices were added automatically

The choices listed below did not appear to have a raw value listed but only had a label, so a raw value has been provided for them automatically. If you are not satisfied with these auto generated values, you may change them before saving your changes for this field. The choices in the 'Choices' text box have automatically been modified to reflect these changes.

1 was set as the raw value for **Chocolate**

2 was set as the raw value for **Strawberry**

3 was set as the raw value for **Vanilla**

4 was set as the raw value for **Butter Pecan**

5 was set as the raw value for **Mint Chocolate Chip**

Choices (one choice per line)

1, Chocolate

2, Strawberry

3, Vanilla

4, Butter Pecan

5, Mint Chocolate Chip

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:

Question Number (optional)

Displayed only on the survey page

Field Label [How to use Piping](#)

What is your favorite flavor of ice-cream?

Choices (one choice per line)

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

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

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

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.

What is your favorite flavor of ice-cream?

Multiple Choice – Radio Buttons (Single Answer)

This field will display your answer choices as radio buttons

Edit Field ✕

You may add a new project field to this data collection instrument 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:

Question Number (optional)

Displayed only on the survey page

Field Label [How to use Piping](#)

What is your favorite flavor of ice-cream?

Choices (one choice per line)

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

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

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

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.

What is your favorite flavor of ice-cream?

Chocolate
 Strawberry
 Vanilla
 Butter Pecan
 Mint Chocolate Chip

[reset](#)

Checkboxes (Multiple Answers)

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

Edit Field ✕

You may add a new project field to this data collection instrument 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: Checkboxes (Multiple Answers)

Question Number (optional)
Displayed only on the survey page

Field Label [How to use Piping](#)
What are your favorite flavors of ice-cream?

Choices (one choice per line)
1. Chocolate
2. Strawberry
3. Vanilla
4. Butter Pecan
5. Mint Chocolate Chip
[How do I manually code the choices?](#)

Variable Name (utilized during data export)
favorite_icecream 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 Right / Vertical (RV)

Align the position of the field on the page

Field Note (optional)
Check all that apply
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**

What are your favorite flavors of ice-cream?

Chocolate
 Strawberry
 Vanilla
 Butter Pecan
 Mint Chocolate Chip

Check all that apply

Yes – No

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

Edit Field ✕

You may add a new project field to this data collection 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: Yes - No

Question Number (optional)
Displayed only on the survey page

Field Label [How to use Piping](#)
Do you like ice-cream?

Choices (not modifiable)
1. Yes
0. No

Variable Name (utilized during data export)
like_icecream 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 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**

Do you like ice-cream?

Yes
 No

reset

True – False

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

Edit Field

You may add a new project field to this data collection instrument 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: True - False

Question Number (optional)
Displayed only on the survey page

Field Label
[How to use Piping](#)

You hate ice cream!

Choices (not modifiable)

1, True
0, False

Variable Name (utilized during data export)
hate_icecream
ONLY letters, numbers, and underscores

Required?* No Yes
* Prompt if field is blank


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

Custom Alignment Right / Vertical (RV)

Align the position of the field on the page

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

You hate ice cream!

True
 False

reset

Signature (draw signature with mouse or finger)

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

Edit Field

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

Field Type: Signature (draw signature with mouse or finger)

Question Number (optional)
Displayed only on the survey page

Field Label
[How to use Piping](#)

Sign your name:

Variable Name (utilized during data export)
signature
ONLY letters, numbers, and underscores

Required?* No Yes
* Prompt if field is blank


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

Custom Alignment Right / Vertical (RV)

Align the position of the field on the page


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

Sign your name:

 [Add signature](#)

File Upload (for users to upload files)

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

Edit Field

You may add a new project field to this data collection instrument 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: **File Upload (for users to upload files)**

Question Number (optional)
Displayed only on the survey page

Field Label [How to use Piping](#)
Please upload a picture of you eating ice cream


Variable Name (utilized during data export)
picture_eating_icecream 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 **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**

Please upload a picture of you eating ice cream

 [Upload document](#)

Slider Visual Analog Scale

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

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: **Slider / Visual Analog Scale**

Question Number (optional)
Displayed only on the survey page

Field Label [How to use Piping](#)
How often do you eat ice cream?


Variable Name (utilized during data export)
how_often_eat_icecream 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 **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.

Labels displayed above slider:
Left-hand label (if any): **Atleast Once a Year**
Middle label (if any): **Atleast Once a Mont**
Right-hand label (if any): **Atleast Once a Weel**
Display number value (0-100)?

Save **Cancel**

How often do you eat ice cream?

Atleast Once a Year Atleast Once a Month Atleast Once a Week

 28

[reset](#)

Descriptive Text (with optional Image/File Attachment)

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

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: Descriptive Text (with optional Image/File Attachment)


Question Number (optional)
Displayed only on the survey page

Field Label [How to use Piping](#)
The sundae is a sweet ice cream dessert. It typically consists of one or more scoops of ice cream topped with sauce or syrup, and in some cases other toppings including sprinkles and whipped cream.

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


Attach an image or file (optional)
[wallpaper-ice-cream-sundae.jpg](#) [X] Remove

If attachment is an image file, display as inline image or as link on page?
 Link
 Inline image
(Images wider than 600 pixels will be downsized to fit page.)

Looking for Branching Logic? Try clicking the  icon for this field after clicking the Save or Cancel button below.


Link:

The sundae is a sweet ice cream dessert. It typically consists of one or more scoops of ice cream topped with sauce or syrup, and in some cases other toppings including sprinkles and whipped cream.

Attachment:  [wallpaper-ice-cream-sundae.jpg](#) (0.19 MB)

Inline Image:

The sundae is a sweet ice cream dessert. It typically consists of one or more scoops of ice cream topped with sauce or syrup, and in some cases other toppings including sprinkles and whipped cream.



Begin New Section (with optional text)

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

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: Begin New Section (with optional text)

Field Label [How to use Piping](#)

Demographic Information

Save Cancel

With optional text:

Demographic Information

With no text:

Add Matrix of Fields

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

Add Field Add Matrix of Fields

Edit Matrix of Fields

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

Matrix Header Text (optional) *Note: Adding section header text here will start a new page on the survey.

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

Enable auto naming of variable based upon its Field Label?

Field Label	Variable Name <small>ONLY letters, numbers, and underscores</small>	Question Number <small>(optional)</small>	Required?
Chocolate	choc		<input type="checkbox"/>
Strawberry	straw		<input type="checkbox"/>
Vanilla	van		<input type="checkbox"/>
Butter Pecan	butpec		<input type="checkbox"/>
Mint Chocolate Chip	mintcc		<input type="checkbox"/>

[Add another row](#)

Matrix Column Choices

Choices (one choice per line)

1. Never
2. Rarely
3. Sometimes
4. Often
5. Always

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

Other Matrix Info

Answer Format: Single Answer (Radio Buttons)

Ranking: What is a ranked matrix of fields?

Allow only 1 choice to be selected per column (radio buttons only)

Matrix group name: ONLY letters, numbers, and underscores


icecream matrix What is a matrix group name?


Save Cancel


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


	Never	Rarely	Sometimes	Often	Always
Chocolate	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Strawberry	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Vanilla	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Butter Pecan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mint Chocolate Chip	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

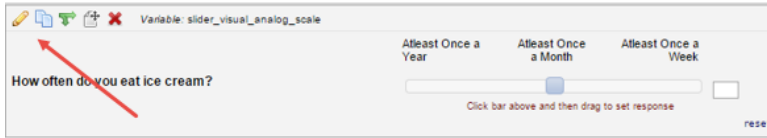
Edit/Copy/Move/Delete a Field

Edit: To edit a field, click on the pencil icon 


Copy: To copy a field, click on the double paper icon 

Move: To move a field, click on the paper with pointer icon 

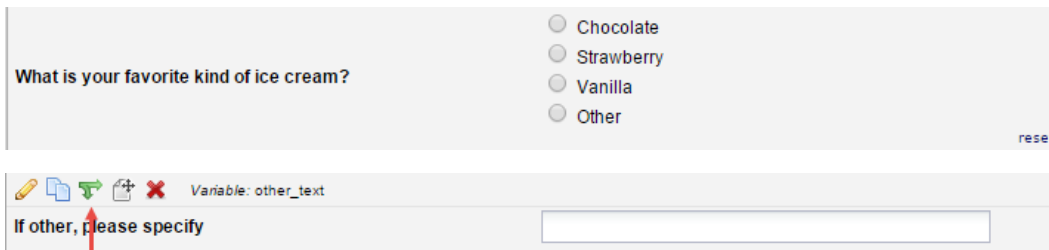
Delete: To delete a field, click on the red X icon 



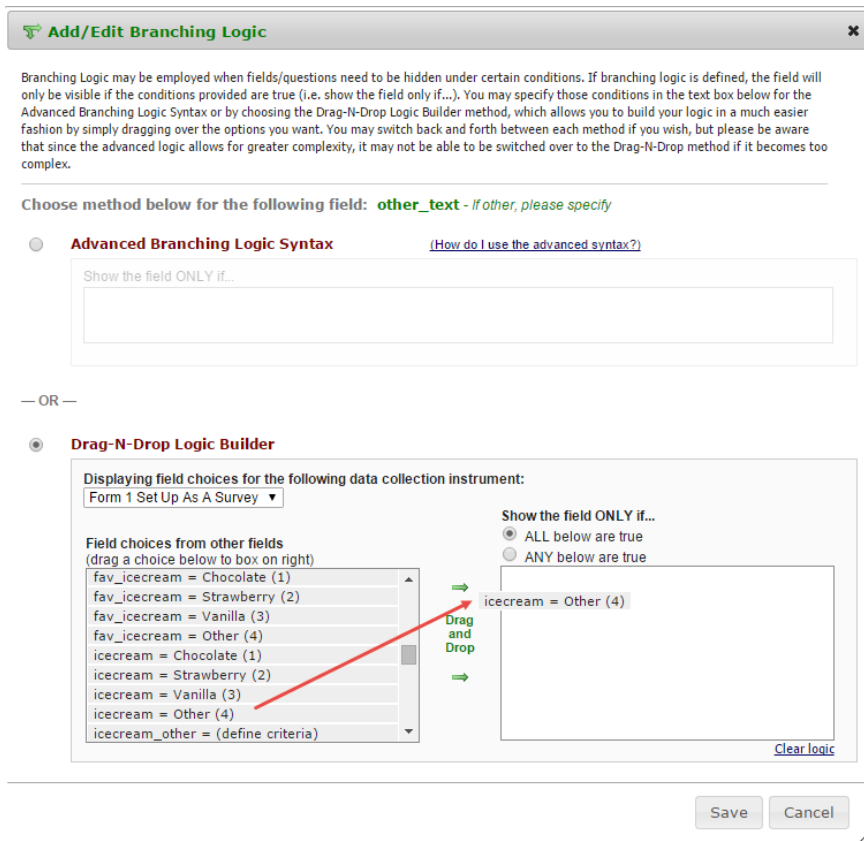
Add Branching Logic

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

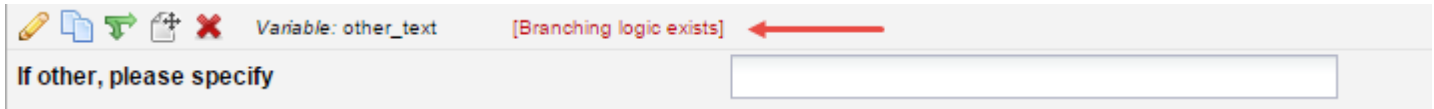
For an example, I only want the “If Other, please specify” field to show if the answer to the question above it was Other.



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



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

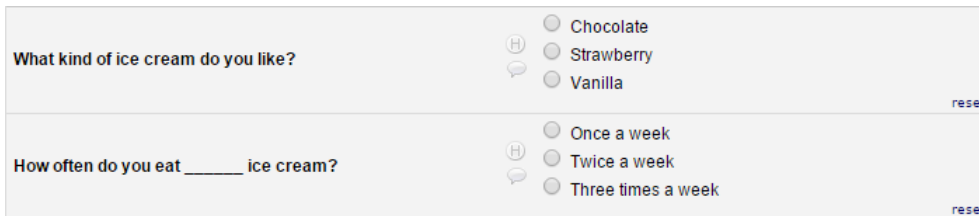


Add Piping Logic

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

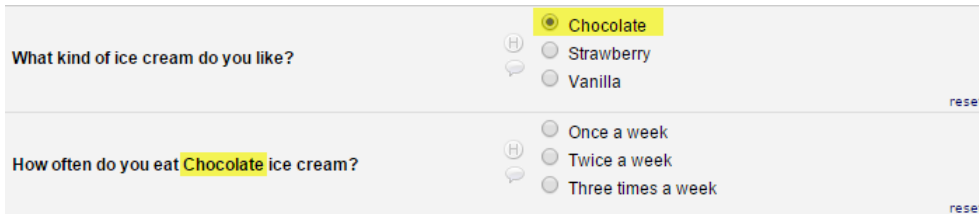
For an example, I have a field that asks the participant “What kind of ice cream do you like?”. I then have another field that asks the participant “How often do you eat ___ ice cream?”. I have added piping logic in my second question so that it will insert the answer from the first question.

Before:

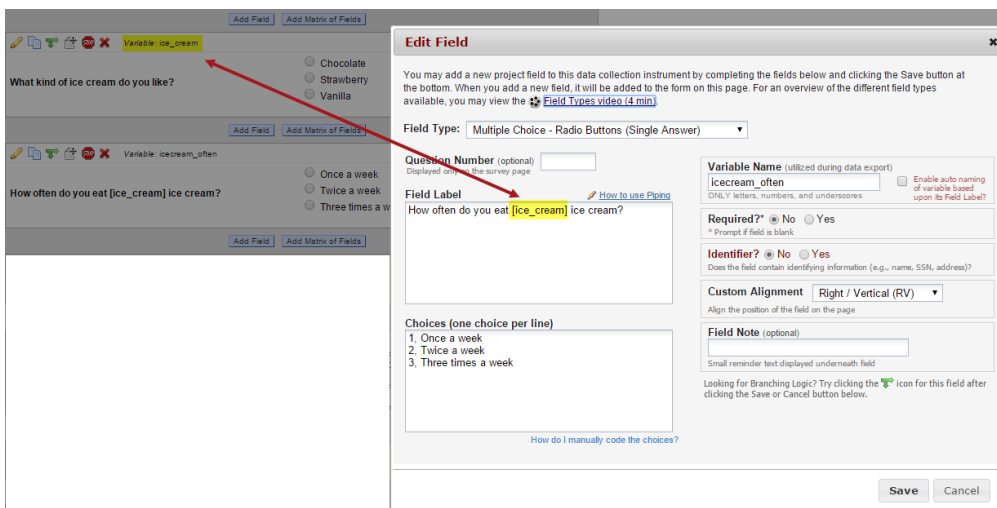


Once the participant answers the first question; the answer is then inserted into my next question.

After:



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

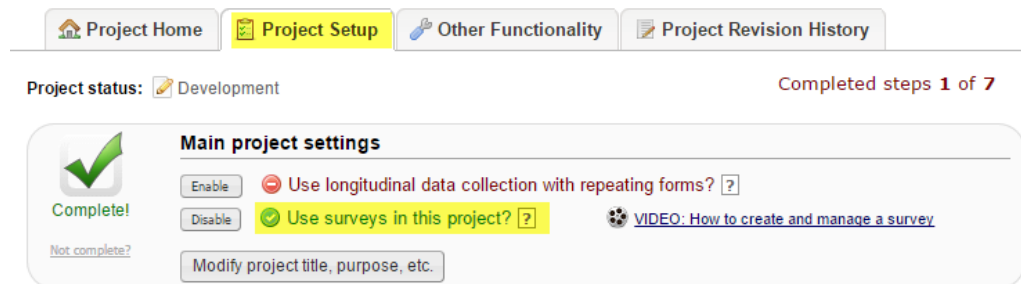


Piping can be used in many different places in REDCap such as:

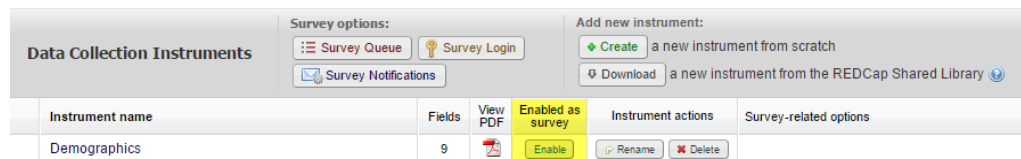
- Field Labels
- Field Notes
- Section Headers
- Survey Instructions & Survey Acknowledgement Text

Enable Your Instrument as a Survey

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



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



Survey Settings

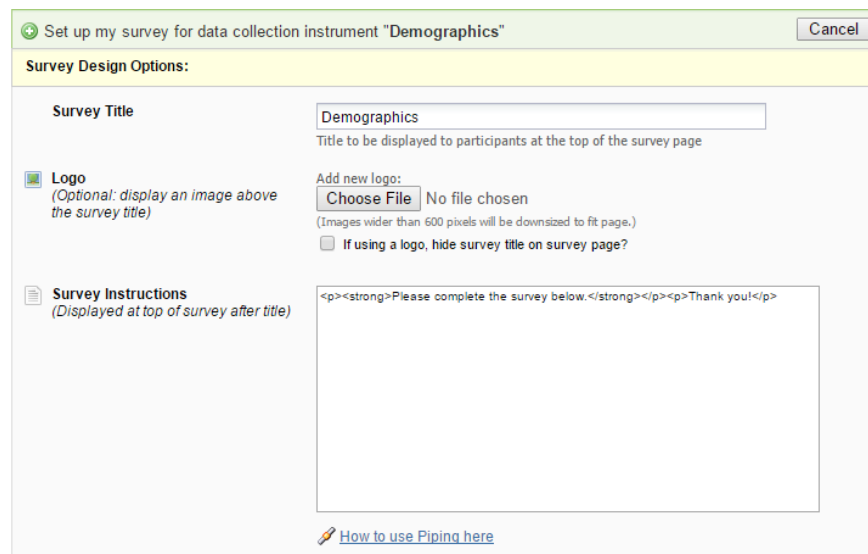
Once you enable your data collection instrument as a survey, the “Set up my Survey” page will appear.

Survey Design Options

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

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

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



Survey Customizations

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

Question Display Format –

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


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

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

Survey Customizations:

Question Numbering

Question Display Format
(One page or multiple pages?)
 Display page numbers at top of survey page

 **Allow survey respondents to view aggregate survey results after completing the survey?**
After completing the survey, participants can view ALL responses in aggregate graphical format and/or as descriptive statistics. Also, the individual respondent's answers will be highlighted in the results.

Additional settings:

Minimum number of responses required before participants are allowed to view aggregate data (recommended = 10).


Do not show plots for questions lacking diversity in response values?
([What does this mean?](#))

Survey Access


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

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

Survey Access:

 **Survey Expiration (optional)**
(Time after which the survey will become inactive.) ⓘ

The time must be for the time zone America/Chicago, in which the current time is 04/26/2015 13:28.

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

 Allow respondents to return and modify completed responses? ⓘ

Survey Termination Options

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

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

Survey Termination Options:

Redirect to a URL
(Redirect to a webpage when survey is completed)

Provide a full URL, e.g. <http://www.example.com/mypage.html>
[How to use Piping here](#)

— OR —

Survey Acknowledgement Text
(Displayed after survey is completed)

`<p>Thank you for taking the survey.</p><p>Have a nice day!</p>`

[How to use Piping here](#)

Public Survey Link

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

Record Status Dashboard

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

Record Status Dashboard (all records)

Displayed below is a table listing all existing records/responses and their status for every data collection instrument (and if longitudinal, for every event). You may click any of the colored buttons in the table to open a new 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 ● Incomplete (no data saved)
- Unverified ✔ Partial Survey Response
- Complete ✔ Completed Survey Response

Displaying record "1" through "5" of 5 records

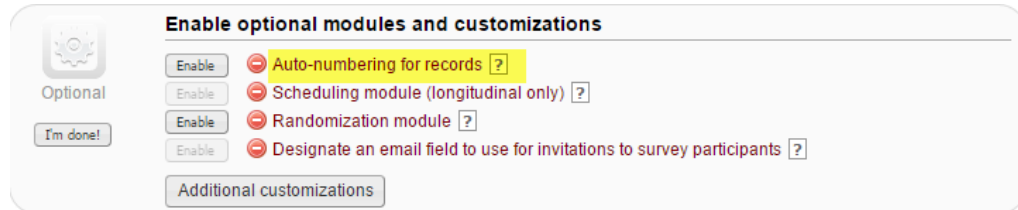
Displaying: [Instrument status only](#) | [Lock status only](#) | [All status types](#)

Study Id	Ice Cream Survey
1	✔
2	●
3	✔
4	●
5	●

Enable Optional Modules and Customizations

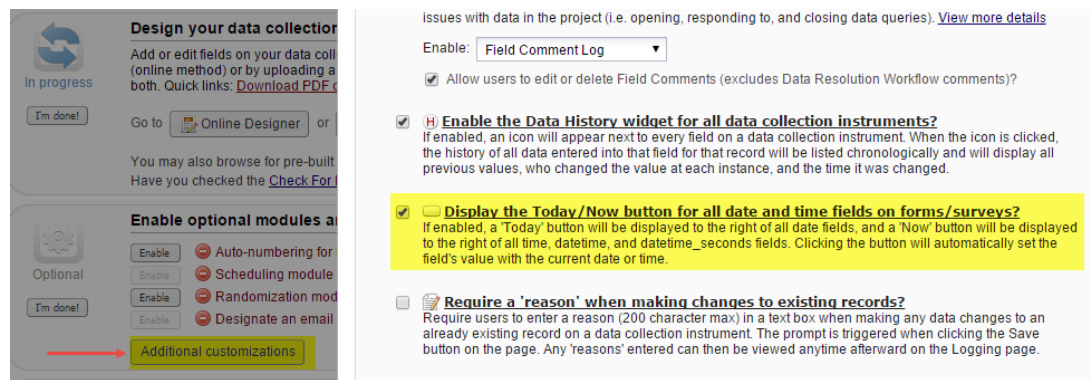
Auto-numbering for records

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



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

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



Applications

Data Exports, Reports and Stats

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

Data 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				

You may also create your own custom reports in which you can filter the report to specific fields, records, or events using a vast array of filtering tools to make sure you get the exact data you want. Once you have created a report, you may view it as a webpage, export it out of REDCap in a specified format (Excel, SAS, Stata, SPSS, R), or view the plots and descriptive statistics for that report.

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

STEP 1

User Access: Choose who can view this report

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

STEP 2

Fields to include in report Add all fields from selected instrument: -- choose instrument --

Field 1	Field 2	Field 3	Instrument	
record_id "Study Id"	mc_dropdown "Multiple Choice (Drop Dow	-- select a field --	Form 1 Set Up As A Survey	X

Additional fields to include in report (optional)

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

STEP 3

Filters (optional) Operator / Value

Filter 1: mc_dropdown "Multiple Choice (Drop Dow" = Chocolate X

AND

Filter 2: -- select a field -- =

Switch format: [Use advanced logic](#)

STEP 4

Order the Results (optional)

First by: record_id "Study Id" Ascending order

Then by: Type variable name or field label Ascending order

Then by: Type variable name or field label Ascending order

Logging

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

Logging [Download entire logging record to Microsoft Excel \(CSV\)](#)

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

Filter by event: All event types (excluding page views)

Filter by user name: All users

Filter by record: All records

Displaying events (by most recent): 1 - 28

Time / Date	Username	Action	List of Data Changes OR Fields Exported
04/26/2015 2:38pm	jahoitenga	Created Record 2	visit_date = '2015-04-27', daily_medication_list = 'Tylenol', email_address = 'wcteachout@cmh.edu', county(3) = checked, diabetes_indicator = '0', diabetes_if = '0', participant_signature = '16975', signed_consent_form = '16976', demographics_complete = '2', record_id = '2'
04/26/2015 2:38pm	[survey respondent]	Created Response 1	visit_date = '2015-04-26', daily_medication_list = 'None', email_address = 'jahoitenga@cmh.edu', county(1) = checked, diabetes_indicator = '0', diabetes_if = '0', participant_signature = '16973', signed_consent_form = '16974', record_id = '1', demographics_complete = '2'
04/26/2015 2:37pm	jahoitenga	Manage/Design	Set up survey
04/26/2015 2:36pm	jahoitenga	Manage/Design	Modify project settings
04/26/2015 2:29pm	jahoitenga	Manage/Design	Modify project settings
04/26/2015 1:26pm	jahoitenga	Manage/Design	Modify project settings
04/25/2015 1:47pm	jahoitenga	Manage/Design	Create project field
04/25/2015 1:45pm	jahoitenga	Manage/Design	Reorder project fields
04/25/2015 1:45pm	jahoitenga	Manage/Design	Create project field
04/25/2015 1:23pm	jahoitenga	Manage/Design	Create project field
04/25/2015 1:21pm	jahoitenga	Manage/Design	Create project field
04/25/2015 1:12pm	jahoitenga	Manage/Design	Edit project field

User Rights and Permissions

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

General Testing I

Project status: Development

Project status: Development

Main

In progress

Disabl

Disabl

I'm done!

Mod

Design

In progress

Add or Online either Quick

I'm done!

Go to

You m

Have :

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)

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

If the person is not found, this either means they do not have access to REDCap or they have not set up their user profile. If they are an Upstate employee, you can add them to your project by entering their Upstate username. You cannot add them by their email address.

Correct way: wsmith **Incorrect way:** wsmith@upstate.edu

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

Basic Rights

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

Add / Edit Reports

Stats & Charts

Other privileges:

Manage Survey Participants

Calendar

Data Import Tool

Data Comparison Tool

Logging

File Repository

Data Quality

API

Data Entry Rights

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

	No Access	Read Only	View & Edit	Edit survey responses
Form 1 Set Up As A Survey (survey)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>
Formatting Fun (survey)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>

New User Notification

Notify user of their project access via email?

Add user Cancel

Set Up Project Bookmarks

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

Test Your Project Thoroughly

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

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

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

The best way to test your project is to use it as if you were entering real production data, and it is always helpful to have colleagues (especially team members) take a look at your project to get a fresh set of eyes looking at it.

Move Your Project to Production

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

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

Intermediate Topics

Survey Topics

- Survey Queue
- Survey Login
- Survey Notifications
- Automated Invitations
- Stop Survey Action
- Participant List, Compose Survey Invitations & Survey Invitation Log

Define events and designate instruments

- Define events
- Designate Instruments for My Events

Enable optional modules and customizations

- Designate an email field to use for invitations to survey participants
- Set a custom record label
- Define a secondary unique field
- Order the records by another field
- Enable the Field Comment Log or Data Resolution Workflow (Data Quieres)
- Enable the Data History widget for all data collection instruments

- Require a 'reason' when making changes to existing records

Applications

- Calendar & Scheduling
- Field Comment Log
- File Repository
- User Rights and DAGs

Advanced Topics

Define events and designate instruments

- Create additional Arms

Enable optional modules and customizations

- Randomization module

Applications

- Data Import Tool
- Data Comparison Tool
- Record Locking Customization
- E-signature and Locking Mgmt
- Data Quality

Additional Training/Support Resources

If you have questions or need project consulting, please feel free to email Matthew Mahoney at mahonema@upstate.edu