REDCap Compact Cheat Sheet

Revised 09/25/2018

REDCap Project Modes

Development
REDCap is fully functional
Data not protected from accidental deletion.
Make changes at will.
This is the proper development and testing mode, prior to data collection.

Production
Required for IRB projects.
Best data protection.
Changes made in Draft Mode.
This is the proper mode while collecting/entering data.

Inactive
Data entry is disabled. No new records.
Can still *process* data: run reports, export data, etc.

Archived
Data entry and analysis is complete

Project Setup Page

Default page when you open a specific project

- Set your Main Project Settings, such as Project Title, Purpose, etc.
- Enable Survey and Longitudinal Functionalities
- Access your Online Designer or Data Dictionary
- Enable Optional Modules and Customizations
  - Repeatable Instruments
  - Enable/Disable Auto Numbering
  - Randomization
  - Set an "Email" field for Automated invitations
  - Other customizations
- Set up Project Bookmarks
- Access User Rights
- Move your project to Production Status

Other Useful Tools

Data Import Tool
---Access from Left Navigational menu
---Download import template for uploading records to that specific project
---Can preview results BEFORE committing records
---Can upload to projects already containing data

Data Comparison Tool
---View 2 records side by side for Data Quality

File Repository
---Upload files to the project to maintain as a library of documents regarding the project

Types of Projects you can Design >>>>

--Basic Project with internal forms
--Basic Single Survey
--Hybrid mix of internal forms and surveys
--Longitudinal Project
--Project with "customizations" (DDE, Randomization)

Methods of Deploying Surveys in Redcap

Basic single survey project utilizing the Public Survey URL

---The Public URL is only available for a survey in the first position (at the top) in your List of Instruments.

---Auto-integer (the default mode for numbering records) must be enabled when there is a survey in the first position (at the top of the list).

---Can send the URL to recipients from Outlook or another email application or post the URL on a web page and invite the public to take the survey.

Using a List of Participants in REDCap

---Accessed through the "Manage Survey Participants" link

---REDCap will track the progress of responses and automatically send reminders

---Participants are anonymous by default but a Participant Identifier can be set up in cases where identification is desired

Using Automated Invitations

---Can be used to send surveys to Participants when the first instrument is, itself, NOT a survey, although this method works when the first instrument is ALSO a survey.

---Requires collection of the participant's email address in the first instrument or survey.

---Requires enabling the customization "Designate an email field for sending survey invitations" and selecting the email variable name: enabled from the Project Setup page.

---Often utilized in longitudinal studies, the surveys can be sent out for any of your defined longitudinal events.

---Surveys sent out according to conditions that you define. (i.e. [send_survey]= '1')

Using the Survey Queue

---The link provided to participants will display a list of surveys available to the participant

---Surveys can be enabled/disabled according to conditions that you set

---Surveys can be set up to load automatically after the previous one is completed. They do not have to have the same behavior.

Other Survey functionalities

---Set up a Survey Login

Types of Variables You Can Create

Text Box: Maximum number of characters: 64. Used for short text inputs as well as numbers, integers, dates and times.

Notes Box: Used for long alphanumeric answers up to 3000 characters.

Calculated Field: Used to make calculations in Redcap. Currently the calculated field can only return a number.

Drop-down List: Categorical responses displayed in a drop-down control. Single Answer.

Radio Buttons: Categorical responses displayed next to a round button that can be selected. Single Answer.

Checkboxes: Categorical responses displayed next to a square button that can be toggled. Multiple Answers (Select all that apply).

Yes/No: Boolean selector. Returns a 1 for Yes and 0 for No.

True/False: Boolean selector. Returns a 1 for True and 0 for False.

Signature: Input for survey-takers to sign their name digitally.

File Upload: Provides a link where users can upload a single file to their record, such as a signed consent form or a photograph.

Slider / Visual Analog Scale:

Descriptive Text

Begin New Section (with optional text): Can be used to group variables in an instrument. The section can be named or unnamed. Surveys can be set to display one "section" at a time.

Online Designer Page

---Accessed from your Project Setup page
---GUI for creating your data-entry and survey instruments
---Create/Edit/Delete/Rename/Copy instruments
---Access "Draft Mode" for editing projects currently in Production
---Draft Mode's yellow banner is only present when a project is currently in Production status
---Contains your List of Instruments
---Rename, Copy, Delete & Download instruments from the Choose Action dropdown menu
---Enable instruments as surveys
---Access your survey settings (When using surveys, they must be enabled globally on the Project Setup page before you can enable them in the Online Designer.)
---Set up Automated invitations for surveys
---Set up the Survey Queue
---Set up the Survey Login
---Set up Survey Notifications
---Access the REDCap Shared Library of pre-defined surveys

Survey Settings Page

---Accessed from the List of Instruments page (or Online Designer)
---Edit "Survey Title", which appears at the top of the survey
---Edit "Survey Instructions", which appear at the top of the survey unless blank
---Set your survey design option settings:
>>>Survey Design options
+++Survey Customizations
+++Survey Access
+++Survey Termination options
+++Confirmation email
+++MUST explicitly "Save" the page any time you change your settings.
+++Delete survey settings option (at the bottom below "Save Changes")

Types of Variables You Can Create

These technologies can be used together (i.e. Piping can be used with Action Tags which can be used with Smart Variables, etc.)

- **Calculated Fields**
  - One of the field types you can add to an instrument.
  - Can run calculations resulting in <u>numerical values only</u>.
  - The returned value can subsequently be used to trigger branching logic or utilized in other calculated fields.
  - Available functions described in the Redcap FAQs under the Calculations heading.
- **Piping**
  - Can be used in field labels, the body of emails calculated fields or conditional statements. Example: *Dear Mr. [last_name]* would display as "Dear Mr. Smith".
  - In longitudinal projects, use the event variable in front of it: *Dear Mr. [enrollment_arm_1][last_name]*
- **Action Tags**
  - Begin with @ symbol, like @HIDDEN, @HIDE-CHOICE, @DEFAULT, etc.
  - Add functionality to fields.
  - Place in the "Action Tags / Field Annotation" box when editing a field.
- **Smart Variables**
  - Used similarly to piping, but you don't set the value: these are predefined
  - Return things like the current Redcap username, current event, current record number, current survey's URL, etc.
  - Examples: [user-name],[event-name], [record-name], [survey_queue_url]
- **Branching Logic**
  - Hides a field until some condition has been met
  - Simple Example: A list of choices where the final choice is "Other". When other is selected opens up a hidden field so the user can enter their "other" answer.
  - Can utilize multiple fields to create complex conditions
  - Advanced conditional statements possible

Modules & Customizations

---Enabled from the Project Setup page in your project
---Repeatable instruments and events
---Auto-numbering for records (Enabled by default)
---Scheduling module for longitudinal projects only
---Randomization module
---Email field for sending survey invitations
---Set a custom record label
---Define a secondary unique field
---Order records by another field
---Enable Field Comment Log or Data Queries (Field Comment Log enabled by default)
---More (click the "Additional customizations" button to see other choices)

Data Quality Tools

A variety of tools to assist you with monitoring your data

---**Data Quality Page**
---Access from Left Navigational Menu (item: Data Quality)
---Execute rules to check for missing data, incorrect values
---Create your own simple rules for checking records (i.e. [gender] <> '')

---**Field Comment Log**
---Attach comments regarding specific entered data
---Click grey H (with circle around it) next to field while looking at a record in any instrument
---History of comments is saved
---Comments can later be viewed/exported from Field Comment Log link in Left Navigational menu

---**Data Resolution Workflow**
---Transform the Field Comment Log into a Query-based system
---Use settings under Optional Modules and Customizations
---Queries can later be viewed/exported from "Resolve Issues" link in Left Navigational menu (appears only after Data Resolution Workflow is enabled)

---**Record Locking Management**
---Designated administrator can lock records to prevent tampering
---Can be locked for specific instruments or the entire record

---**E-Signature & Locking Management**
---Require an E-signature from user locking records
---An E-signature is simply entering one's username and password
---Display list of locked records from "E-signature" link in Left Navigational menu

Exports, Reports & Stats

---Accessed from "Data Exports, Reports and Stats" from Left Navigational Menu
---View ALL data as a report, a data export to a csv file, or "Stats & Charts"
---Make custom selections to view as a report or data export
---Use "advanced logic" for more complex AND/OR statements
---Stats & Charts can ONLY be viewed with ALL data (no subsets) at this time
---Save any report
---Reports saved in Left Navigational menu under "Reports"
---Does not appear until you have at least one user-

CODEBOOK

Your project "Codebook" is a human-readable version of your Data Dictionary: a good reference for your Data Analyst (under the "Project Home" tab when in the Project Setup page of your project.)

User Rights

---Accessed from button on the Project Setup page
---Add/Edit users' access to and permissions on your project
---The User MUST have a Redcap account BEFORE you can add them to your project
---Begin typing name in "Add new user" input box
---REDCap tries to autofill. If user does not come up in the list, make sure they have a REDCap account first
---Define specific permissions for each user or create "roles" to define common sets of permissions
---Can assign users to roles instead of defining specific permissions
---Set expiration dates for user access to your project