

REDCap Step By Step

May 24, 2017

- First, create your project
 - Click the “Create New Project” and make a new REDCap project. Give it any name you want.
 - Select the “purpose” of the project to be “Practice / Just for fun”.
 - Choose to create an empty project (blank slate).
 - Click “Create Project”
- Second, define your project level settings
 - Make sure the main project settings are correct and complete (i.e. don’t call it a Research project and neglect to enter your IRB information.) These settings can be updated at any time.
 - Enable surveys or longitudinal functionalities as needed: For now, let’s leave these disabled.
 - Enable any optional modules and customizations. Auto-numbering is selected by default. (There are more customizations behind the “Additional customizations” button—some selected by default.) For now, let’s just leave the defaults.
- Third, define your User Rights
 - Add users who will be able to access your account from User Rights & Permissions
 - Reserve the “Highest Level Privileges” for only those who need them.
 - Remember that if “User Rights” is checked in someone’s permissions, they actually have ALL permissions because they can go in and upgrade their own permissions at any time.
 - Define the user’s form-level Data Entry Rights (you can revoke a user’s access to any instrument(s)).
- Fourth, begin to design your data collection instruments
 - Click the “Online Designer” button
 - Rename the default instrument “My First Instrument” to “Screening” using the “Choose Action” drop down at the right side of the list of instruments.
 - We will add a few more instrument as well to serve as placeholders for future design. Click “Create” from the list of buttons on top of the list of instruments
 - Click the “Add instrument here” button in the location you want to create the instrument. These can be moved around later if you change your mind about the order of things.
 - Give the new instrument a name, such as “Interview” and click the “Create” button next to the text box.
 - Repeat the steps to add instruments called “Lab Results” and “Follow-up”
- Fifth: Adding fields to your instruments (this exercise will just add fields to “Screening”).
 - Click the “Screening” form to open it for editing
 - Leave the Record ID field where it is. (You can’t delete it. This field will always need to stay at the top of the first instrument. If the first instrument is a survey, the field WILL NOT be visible of survey-takers.)
 - Click the “Add Field” button in the location where you want to create the field.
 - Select the type of field you want to create from the “Field Type” drop-down list. (For additional information about field types, [please refer to the FAQ section](#)).
 - Variable names may only contain letters, numbers or underscores (no spaces), and must be 26 characters or less; and the first character cannot be a number. Shorter is better if possible because these names will become headers for your data sets.

1. We are pleased about your interest in our study. Please watch the video and then answer the survey questions below to be considered for enrollment. If you are selected for participation you will be sent a consent survey, which you must complete and sign in order for you to be able to work with us. Thank you for your time and consideration.
(Descriptive Text field with "inline" embedded video: <https://youtube.com/watch?v=E1cCuWMupz0>)
2. First Name _____
(Text box with 32character string validation)
3. Thank you [f_name]. Now tell us your Last Name _____
(Text box with 32 character string validation. Pipe the First Name value into the label of the Last name using the First Name variable in square brackets)
4. Date of Birth _____
(Text Box with MDY validation)
5. Phone Number _____
(Text Box with phone validation)
6. Zip Code _____
(Text Box with phone validation)
7. Mailing Address
(Notes box for paragraph text (up to 3000 characters))
8. What is your favorite color?
Red
Green
Blue
Yellow
Other
(radio buttons (multiple-choice, single answer))
9. Favorite Color
Red
Green
Blue
Yellow
Other
(drop-down list (multiple-choice, single answer; hint: you can copy the previous field and make adjustments as needed.)
10. Favorite Color
Red
Green
Blue
Yellow
Other
(checkboxes (multiple-choice, multiple answer; hint: you can copy the previous field and make adjustments as needed.)

11. If favorite color is “other”, enter your favorite color here.
 (Text Box with 32 character string validation; branching logic to hide the field unless “Favorite Color: Other” is selected)

12. Age _____
 (Calculated field using DateDiff function: `datediff ([dob], "today", "y", "MDY", true)`. If your function returns too many decimal places, you can wrap the `rounddown()` function around it like this: `rounddown(datediff ([dob], "today", "y", "MDY", true), 0)` That will round it down to the nearest whole number. [Refer to calculations FAQs in Redcap here](#). We want this hidden in survey view, so we’ll use the @HIDDEN-SURVEY Action Tag to do this.)

13. Move the slider to self-describe your personality on a spectrum.
 (Slider field with Left Label verbiage, “Laid back/Quiet”, and Right Label verbiage, “Energetic/Excitable”)

14. Generally, what is your overall mood at these times of day:

	Very Depressed	Depressed	Neither depressed nor happy	Happy	Very Happy
When you get up in the morning	1	2	3	4	5
When you go to bed at night	1	2	3	4	5
In the middle of the day	1	2	3	4	5

(Use the Matrix of Fields button)

15. I agree to be screened and considered for enrollment in this project. Yes/No
 (Yes/No field)

16. Please provide an electronic signature
 (Signature field)

Data Entry for a Basic (non-longitudinal) Project

As is, your project could be used for basic data entry. But, in any case, we want to test our project’s functionality by entering some fake records. To Add or Edit your records click the [“Add/Edit Records”](#) link in the left side navigation list under “Data Collection.” Click the button to “Add new record”. (If you have auto-numbering turned off you will be presented with a text box where you will enter your record number and hit RETURN. All record numbers must be unique.

That will direct you to the Record Status Dashboard where you will see the record number, all the instruments, and the instrument status: incomplete, unverified or complete. Click in the “Status” bubble to enter data into that instrument. (If you only have one instrument in your project, adding a new record will take you directly to that instrument to begin entering data.)

Once you have entered data into the instrument, you always have to explicitly set your record status (incomplete, unverified, or complete) as well as explicitly SAVE your data using the buttons at the bottom of the form.

Here are the basic steps to set up the Screening instrument as a survey:

- In the “Project Setup” tab, under “Main project settings”, click the “Enable” button for using surveys in the project.
- Then click the “Online Designer” button.
- In the “Online Designer” click the “Enable” button in the column “Enabled as survey”.

- That takes you to the “Survey Settings” where you can make various setting changes regarding the functionality and appearance of your survey.
- You MUST click the SAVE button at the bottom of the Survey Settings page in order for any changes to be saved.
- Go back into the “Online Designer”
- In the list of data collection instruments, under the “Enabled as Survey” column, the “Enable” button has been replaced with an icon of a little green shield. If you see the shield, the instrument is already enabled and clicking the shield will take you back into the Survey Settings. (If you click “Delete” in your survey settings, your survey will be disabled but you will not be deleting the instrument that you created.)
- You can now go into the “Manage Survey Participants” page (left side menu) to manage a list of survey recipients or get a public URL to the survey.

You can also set up this project to be a survey PLUS longitudinal data forms. This will allow us to use any instrument in the project multiple times. So, for example, let’s say that after our user completes the Screening survey, we determine whether or not they qualify for further participation in the study. If they qualify, we invite them back for three visits, one month apart. Here are the basic steps to set this up:

- In the “Project Setup” tab, under “Main project settings”, click the “Enable” button for using longitudinal data with repeating forms.
- Then click the “Define My Events” button
- The first event already exists, but we want to change the name to suit our purposes, so, click the pencil icon at the left side of the event number to edit the event.
- Change the “Event Name” to “Qualify”
- Save the event by clicking the “Save” button at the left.
- In the next row, we will be adding a new event. Enter “Month One” for the Event Name.
- Click the “Add New Event” button.
- Add another event with an Event Name of “Month Two”.
- Add another event with an Event Name of “Month Three”.
- Add another event with an Event Name of “Follow-up”.
- Now that your events are defined, click on the “Designate Instruments for My Events” tab.
- Click the button to “Begin Editing”
- Using the checkboxes array, assign the Screening form to the “Qualify” event and assign Interview and Lab Results to “Month One”, “Month Two”, and “Month Three”.
- Click the “Save” button
- Assign the Follow-up instrument to the Follow-up event
- Click “Add/Edit Records” from the Left Nav menu.
- Click the button to add a new record. You should see the record’s “Event Grid”.
- Now, when you enter records you will have the choice of entering exam results for any one of the three exam visits.

TEST YOUR PROJECTS THOROUGHLY BEFORE MOVING INTO PRODUCTION!

AFTER you have thoroughly tested your project with fake records and are satisfied that it functions according to your expectations, you can move the project into production and begin the process of collecting genuine data.

To Move the Project Into Production:

- Navigate to your Project Setup page
- At the bottom of the page, click the “Move to production” button
- You will be given a choice to either keep all data saved so far (if you tested with real records rather than fake records), or deleting all the test data and starting with a clean slate.

- The request comes to the Redcap Support Team for approval
- At this point, if you are an IRB study and have not submitted your IRB documents to use, we will request them of you and will put the project into production once we receive them.
- You will be notified by Redcap that your project is in Production

Moving into Production prohibits you from making further changes in real time. This protects your data from accidental deletion. But you CAN make changes to your project after you have moved to Production. You do this in DRAFT mode.

To Move your Project into DRAFT mode for making changes while in Production:

- From the Project Setup page, click the button to your Online Designer
- Since you are already in Production, a yellow banner at the top of your Online Designer explains that you may enter “Draft Mode” to make changes to your project.
- Click the “Enter Draft Mode” button
- Once in Draft mode, you may make changes to your instruments that will not immediately affect your project.
- When you have completed making changes to your instruments, return to the yellow banner at the top of the Online Designer page and click the link to “View detailed summary of all drafted changes.” This report will let you know if Redcap suspects that a change you made might adversely affect your data. This is the same information that will be sent to the Redcap administrator. Based on the information you get, you can make more changes or submit the changes for approval.
- The Changes will get reviewed by the Redcap administrator. If the changes are benign and won’t affect your data, the administrator will approve the changes and they will be applied to your project. Otherwise they will be applied to your project and you will be notified by REDCap that the changes have been completed.