



REDCap Features, Tips, & Tricks

Learning Objectives

I. Customize Data Entry Experience

- Piping
- Field Embedding
- Matrix of Fields
- Field Validation
- Quasi Required Fields
- Action Tags

II. Customize Researcher Experience

- Data Structure - Wide vs Long format
- Alerts & Notifications
- Custom Record Label
- Custom Record Dashboard
- Reports in REDCap

III. General Advice & Suggestions

- Move to Production
- Copy Project to explore
- Prevent Abandoned Projects
- Delete old projects
- Disable auto-fill
- Q & A

[Piping]

Piping is a way (using square brackets) to essentially take a data value and display it somewhere else, i.e., email, field label

Piping Example Project Template

+ Create a new REDCap Project

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

Project title:
Title to be displayed on project webpage

Purpose of this project:
How will it be used?

Assign project to a Project Folder?

Project notes (optional):
Comments describing the project's use or purpose that are displayed on the My Projects page.

Start project from scratch or begin with a template?

- Create an empty project (blank slate)
- Upload a REDCap project XML file (CDISC ODM format) [?](#)
- Use a template (choose one below)

<input type="radio"/>	Multiple Surveys (longitudinal)	Contains three surveys and a data entry form. Includes a pre-screening survey followed by two follow-up surveys, one of which is a questionnaire taken weekly to capture participant information longitudinally over a period of... Show more
<input checked="" type="radio"/>	Piping Example Project	Contains a single data collection instrument enabled as a survey, which contains questions to demonstrate the Piping feature.
<input type="radio"/>	Progress Bars	Demonstrates examples of how HTML can be incorporated into Section Headers to generate progress bars.
<input type="radio"/>	Project Tracking Database	Contains fifteen data entry forms dedicated to recording the attributes of and tracking and progress of projects/studies.
<input type="radio"/>	Randomized Clinical Trial	Contains seven data entry forms for collecting data for a randomized clinical trial. Includes a short demographics form followed by a form where randomization is performed. An example randomization model has already been set up.... Show more

Piping Demonstration

Variable: first_name [How to embed a field elsewhere](#)

Your first name
* must provide value

Add Field Add Matrix of Fields

Variable: last_name [How to embed a field elsewhere](#)

Your last name
* must provide value

Add Field Add Matrix of Fields

Variable: date_today [How to embed a field elsewhere](#)

[first_name], please enter today's date?

Add Field Add Matrix of Fields

Variable: confirm_name [How to embed a field elsewhere](#)

Please confirm your name

[first_name] Harris
 [first_name] [last_name]
 [first_name] Taylor
 [first_name] deGrasse Tyson

reset

Add Field Add Matrix of Fields

Blank Form

Piping Demo

Completed Form

Section 1

Your first name
* must provide value

Your last name
* must provide value

____, please enter today's date?

What is your favorite ice cream?
* must provide value

Chocolate
 Vanilla
 Strawberry

Section 2

How much do you like ____ ice cream?

Hate it Indifferent

Change the slider above to set

Enter your favorite number

Your favorite number above multiplied by 4 is:

View equation

____ x 4 = ____

Please confirm your name

____ Harris

 Taylor
 deGrasse Tyson

Review answers

Review your answers below:

Date: ____
Name: ____
Favorite ice cream: ____
Favorite number multiplied by 4: ____

If all your responses look correct and you did not leave any blank, then click the Submit button below.

Section 1

Your first name
* must provide value Jeff

Your last name
* must provide value Richardson

Jeff, please enter today's date? 10-07-2021 Today M-D-Y

What is your favorite ice cream?
* must provide value

Chocolate
 Vanilla
 Strawberry

Section 2

How much do you like Vanilla ice cream?

Hate it Indifferent

Change the slider above to set

Enter your favorite number 5

Your favorite number above multiplied by 4 is: 20 View equation

Please confirm your name

Jeff Harris
 Jeff Richardson
 Jeff Taylor
 Jeff deGrasse Tyson

Review answers

Review your answers below:

Date: 10-07-2021
Name: Jeff Richardson
Favorite ice cream: Vanilla
Favorite number multiplied by 4: 20



If all your responses look correct and you did not leave any blank, then click the Submit button below.

{ Field Embedding }

A feature which (using curly brackets) gives you greater control over the look & feel of your data collection instruments.




Unlike piping which deals with a data value, with field embedding, you're moving the entire field element itself, to somewhere else on the same page.

Field Embedding Use Case #1

    Variable: fname_mom How to embed a field elsewhere



Mother's First Name

[Add Field](#) [Add Matrix of Fields](#)

    Variable: lname_mom How to embed a field elsewhere


Mother's Last Name

[Add Field](#) [Add Matrix of Fields](#)

    Variable: email_mom How to embed a field elsewhere


Mother's Email

[Add Field](#) [Add Matrix of Fields](#)

    Variable: age_mom How to embed a field elsewhere

Mother's Age

[Add Field](#) [Add Matrix of Fields](#)

    Variable: fname_dad How to embed a field elsewhere


Father's First Name

[Add Field](#) [Add Matrix of Fields](#)

    Variable: lname_dad How to embed a field elsewhere




Father's Last Name

[Add Field](#) [Add Matrix of Fields](#)

    Variable: email_dad How to embed a field elsewhere



Father's Email

[Add Field](#) [Add Matrix of Fields](#)

    Variable: age_dad How to embed a field elsewhere




Father's Age

[Add Field](#) [Add Matrix of Fields](#)

    Variable: fname_child How to embed a field elsewhere

Child's First Name

[Add Field](#) [Add Matrix of Fields](#)

    Variable: lname_child How to embed a field elsewhere

Child's Last Name

Demographics

Please complete the survey below.

Thank you!

Mother's First Name	<input type="text"/>
Mother's Last Name	<input type="text"/>
Mother's Email	<input type="text"/>
Mother's Age	<input type="text"/>
Father's First Name	<input type="text"/>
Father's Last Name	<input type="text"/>
Father's Email	<input type="text"/>
Father's Age	<input type="text"/>
Child's First Name	<input type="text"/>
Child's Last Name	<input type="text"/>
Child's Email	<input type="text"/>
Child's Age	<input type="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 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/Video/Audio/File Attachment) ▾

Question Number (optional)
Displayed only on the survey page

Field Label

Use the Rich Text Editor ?

Paragraph ▾ **B** *I*          











     ▾  ▾  ▾   

Table
Cell
Row
Column
Table properties
Delete table

4x3

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/Video/Audio/File Attachment) ▾

Question Number (optional)
Displayed only on the survey page

Field Label

Use the Rich Text Editor ?

Paragraph ▾ **B** *I*        

	First	Last	Email Address	Age
Mother	{fname_mom}	{lname_mom}	{email_mom}	{age_mom}
Father	{fname_dad}	{lname_dad}	{email_dad}	{age_dad}
Child	{fname_child}	{lname_child}	{email_child}	{age_child}


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

Enable auto naming of variable based upon its Field Label?

ONLY letters, numbers, and underscores

How to use  Smart Variables  Piping  Field embedding

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/62730281>, <http://example.com/movie.mp4>

Display format of video: Inline Inside popup

- or -

 Attach an image, file, or embedded audio

 [Upload file](#)

Display format of attachment on page:

- Link
 Inline image
 Audio file (play in embedded player on page)
[Compatibility notice for embedded audio](#)

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

Action Tags / Field Annotation (optional)

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

Save

Cancel

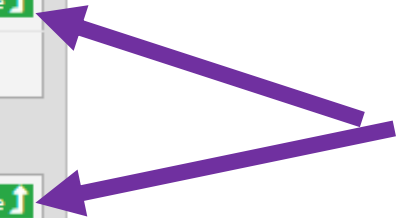
Variable: fname_mom Field is embedded elsewhere on page ↑

Mother's First Name

[Add Field](#) [Add Matrix of Fields](#)

Variable: lname_mom Field is embedded elsewhere on page ↑

Mother's Last Name



Demographics RESIZE TITLE + -

Please complete the survey below.

Thank you!

	First	Last	Email Address	Age
Mother	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Father	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Child	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Submit

Field Label Use the Rich Text Editor ?

Paragraph B I [List Icons] [Undo/Redo] [Fullscreen]

[List Icons] [List Icons] [Table Icon] A [Color Picker] Q <> I_x

	First	Last	Email Address	Age
Mother	{fname_mom}	{lname_mom}	{email_mom}	{age_mom}
Father	{fname_dad}	{lname_dad}	{email_dad}	{age_dad}
Child	{fname_child}	{lname_child}	{email_child}	{age_child}

Copy Ctrl+C

Paste Ctrl+V

Link... Ctrl+K

Table >

Cell >

- Cell properties
- Merge cells
- Split cell

Row >

Column >

Delete table

Action Tags / F

Cell Properties X

General Advanced

Width

Height

Cell type

Scope

H Align

V Align

Cell Properties ✕


General Border width

[Advanced](#)


Border style

Hidden ▼

Border color



Background color



	First	Last	Email Address	Age
Mother	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Father	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Child	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Cell Properties ✕


General Border width

[Advanced](#)


Border style

Solid ▼

Border color



Background color



	First	Last	Email Address	Age
Mother	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Father	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Child	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Field Embedding Use Case #2

Variable: fav_pie

How to embed a field elsewhere

- Apple Pie
- Chocolate Cream Pie
- Banana Cream Pie
- Cherry Pie,
- Lemon Meringue Pie
- Blueberry Pie
- Pumpkin Pie
- Pecan Pie
- Mud Pie
- Coconut Cream Pie
- Other Pie

Favorite Pie

Add Field Add Matrix of Fields

Variable: pie_oth Branching logic: [fav_pie(11)] = '1'

How to embed a field elsewhere

Other Pie

Add Field Add Matrix of Fields

Variable: fav_pizza

How to embed a field elsewhere

- Pepperoni
- Sausage
- Mushroom
- Onion
- Green Pepper
- Extra Cheese
- Pineapple
- Buffalo Chicken
- Barbeque Chicken
- Olive
- Other

Favorite Pizza Topping

Add Field Add Matrix of Fields

Variable: pizza_oth Branching logic: [fav_pizza(11)] = '1'

How to embed a field elsewhere

Other Pizza

Add Field Add Matrix of Fields

Favorite Pie

- Apple Pie
- Chocolate Cream Pie
- Banana Cream Pie
- Cherry Pie,
- Lemon Meringue Pie
- Blueberry Pie
- Pumpkin Pie
- Pecan Pie
- Mud Pie
- Coconut Cream Pie
- Other Pie

Other Pie

Favorite Pizza Topping

- Pepperoni
- Sausage
- Mushroom
- Onion
- Green Pepper
- Extra Cheese
- Pineapple
- Buffalo Chicken
- Barbeque Chicken
- Olive
- Other

Other Pizza

Favorite Pie

Choices (one choice per line)

[Copy existing choices](#)

5, Lemon Meringue Pie
6, Blueberry Pie
7, Pumpkin Pie
8, Pecan Pie
9, Mud Pie
10, Coconut Cream Pie
11, Other Pie {pie_oth}

Field Label

Use the Rich Text Editor ?

Favorite Pizza Topping

Choices (one choice per line)

[Copy existing choices](#)

5, Green Pepper
6, Extra Cheese
7, Pineapple
8, Buffalo Chicken
9, Barbeque Chicken
10, Olive
11, Other {pizza_oth}

Favorite Pie

- Apple Pie
- Chocolate Cream Pie
- Banana Cream Pie
- Cherry Pie,
- Lemon Meringue Pie
- Blueberry Pie
- Pumpkin Pie
- Pecan Pie
- Mud Pie
- Coconut Cream Pie
- Other Pie

Favorite Pizza Topping

- Pepperoni
- Sausage
- Mushroom
- Onion
- Green Pepper
- Extra Cheese
- Pineapple
- Buffalo Chicken
- Barbeque Chicken
- Olive
- Other

Field Type: Descriptive Text (with optional Image/Video/Audio/File Attachment) ▾

Question Number (optional)
Displayed only on the survey page

Field Label Use the Rich Text Editor ?

Paragraph ▾ **B** *I*

▾ A ▾ ▾ 🔍 <> *I*

Favorite Pie	Favorite Pizza Topping
{fav_pie}	{fav_pizza}
{pie_oth}	{pizza_oth}

Favorite Pie	Favorite Pizza Topping
<input type="checkbox"/> Apple Pie	<input type="checkbox"/> Pepperoni
<input type="checkbox"/> Chocolate Cream Pie	<input type="checkbox"/> Sausage
<input type="checkbox"/> Banana Cream Pie	<input type="checkbox"/> Mushroom
<input type="checkbox"/> Cherry Pie,	<input type="checkbox"/> Onion
<input type="checkbox"/> Lemon Meringue Pie	<input type="checkbox"/> Green Pepper
<input type="checkbox"/> Blueberry Pie	<input type="checkbox"/> Extra Cheese
<input type="checkbox"/> Pumpkin Pie	<input type="checkbox"/> Pineapple
<input type="checkbox"/> Pecan Pie	<input type="checkbox"/> Buffalo Chicken
<input type="checkbox"/> Mud Pie	<input type="checkbox"/> Barbeque Chicken
<input type="checkbox"/> Coconut Cream Pie	<input type="checkbox"/> Olive
<input checked="" type="checkbox"/> Other Pie	<input checked="" type="checkbox"/> Other
<input type="text"/>	<input type="text"/>

****Remember, you must first create the fields before they can be embedded elsewhere!****

Field Embedding Example

Project Template

+ Create a new REDCap Project

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


Project title:
Title to be displayed on project webpage

Purpose of this project:
How will it be used?

Assign project to a Project Folder?

Project notes (optional):
Comments describing the project's use or purpose that are displayed on the My Projects page.

Start project from scratch or begin with a template?

- Create an empty project (blank slate)
- Upload a REDCap project XML file (CDISC ODM format) [?](#)
- Use a template (choose one below) 

<input type="radio"/>	DEMO email to TEXT	template shows how text to a participant's cell phone number using the email functionality. Note this technology is not specific to REDCap. A cell phone number can be texted to from Outlook using the same approach.
<input type="radio"/>	DEMO: Participant Management and Tracking	Use of a call log, internal email reminders (Alerts & Notifications) for patient visits, use of numerous emails per record (parent and child), field embedding
<input type="radio"/>	e-Consent template	This is a modular template for building an E-consent process for your study. The template contains built-in instructions fields to understand how to use the template and how to digitally sign a document as a researcher.
<input checked="" type="radio"/>	Field Embedding Example Project	Contains a single data collection instrument to demonstrate the Field Embedding feature.
<input type="radio"/>	Human Cancer Tissue Biobank	Contains five data entry forms for collecting and tracking information for cancer tissue.
<input type="radio"/>	Longitudinal Database (1 arm)	Contains nine data entry forms (beginning with a demography form) for collecting data longitudinally over eight different visits.



Matrix of Fields

Using a field matrix can help to prevent a user from experiencing 'Survey Fatigue', especially on lengthy instruments. It takes up less space and makes it faster and easier to answer each question

Gad7 No Matrix

Please complete the survey below.

Thank you!

Over the last 2 weeks, how often have you been bothered by the following problems?

- | | |
|--|--|
| 1) 1. Feeling nervous, anxious, or on edge | <input type="radio"/> Not at all |
| | <input type="radio"/> Several Days |
| | <input type="radio"/> Over half the days |
| | <input type="radio"/> Nearly every day |
| 2) 2. Not being able to stop or control worrying | <input type="radio"/> Not at all |
| | <input type="radio"/> Several Days |
| | <input type="radio"/> Over half the days |
| | <input type="radio"/> Nearly every day |
| 3) 3. Worrying too much about different things | <input type="radio"/> Not at all |
| | <input type="radio"/> Several Days |
| | <input type="radio"/> Over half the days |
| | <input type="radio"/> Nearly every day |
| 4) 4. Trouble relaxing | <input type="radio"/> Not at all |
| | <input type="radio"/> Several Days |
| | <input type="radio"/> Over half the days |
| | <input type="radio"/> Nearly every day |

5) 5. Being so restless that it's hard to sit still

- Not at all
- Several Days
- Over half the days
- Nearly every day

6) 6. Becoming easily annoyed or irritable

- Not at all
- Several Days
- Over half the days
- Nearly every day

7) 7. Feeling afraid as if something awful might happen

- Not at all
- Several Days
- Over half the days
- Nearly every day

Example survey not using matrix of fields. Requires a lot of scrolling. Can be especially burdensome when 10, 20+ questions

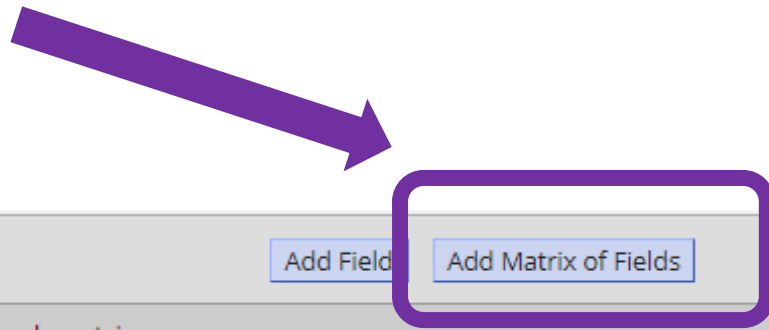
Example: Matrix of Fields

- Same survey as prior but takes up about 1/4th the space

Over the last 2 weeks, how often have you been bothered by the following problems?				
	Not at all sure	Several days	Over half the days	Nearly every day
1. Feeling nervous, anxious, or on edge	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
				reset
2. Not being able to stop or control worrying	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
				reset
3. Worrying too much about different things	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
				reset
4. Trouble relaxing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
				reset
5. Being so restless that it's hard to sit still	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
				reset
6. Becoming easily annoyed or irritable	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
				reset
7. Feeling afraid as if something awful might happen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
				reset
<input type="submit" value="Submit"/>				

Add a Matrix of Fields

- To get started, within the Online Designer, click 'Add Matrix of Fields'



Matrix group: gad_matrix

Over the last 2 weeks, how often have you been bothered by the following problems?

Variable: gad1 [How to embed a field elsewhere](#)

	Not at all sure	Several days	Over half the days	Nearly every day
1. Feeling nervous, anxious, or on edge	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

reset

Here you can set the

- Matrix header text (optional)
- Field Labels
- Variable Names
- Column Choices
- Other Matrix Info including Answer format
- Ranked matrix? Only 1 choice allowed per column
- Must include matrix group name

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 provide 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)

Over the last 2 weeks, how often have you been bothered by the following problems? Expand

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?*	Field Annotation ?
1. Feeling nervous, anxious, or on edge	sc_gad1		<input type="checkbox"/>	<input type="text"/> ✖
2. Not being able to stop or control worrying	sc_gad2		<input type="checkbox"/>	<input type="text"/> ✖
3. Worrying too much about different things	sc_gad3		<input type="checkbox"/>	<input type="text"/> ✖
4. Trouble relaxing	sc_gad4		<input type="checkbox"/>	<input type="text"/> ✖
5. Being so restless that it's hard to sit still	sc_gad5		<input type="checkbox"/>	<input type="text"/> ✖
6. Becoming easily annoyed or irritable	sc_gad6		<input type="checkbox"/>	<input type="text"/> ✖
7. Feeling afraid as if something awful might happen	sc_gad7		<input type="checkbox"/>	<input type="text"/> ✖

Matrix Column Choices [Copy existing choices](#)

Choices (one choice per line)

0, Not at all sure
1, Several days
2, Over half the days
3, Nearly every day

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

Other Matrix Info

Answer Format: Single Answer (Radio Buttons) ▼

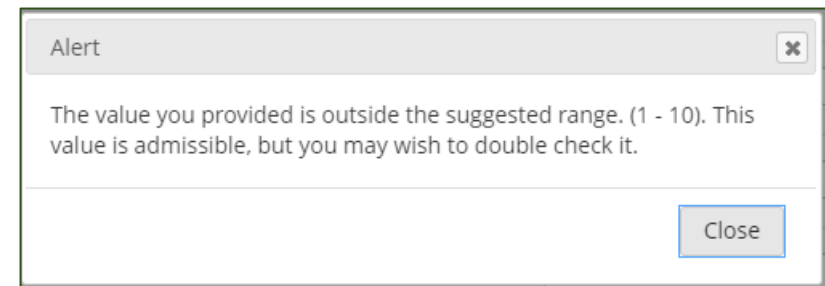
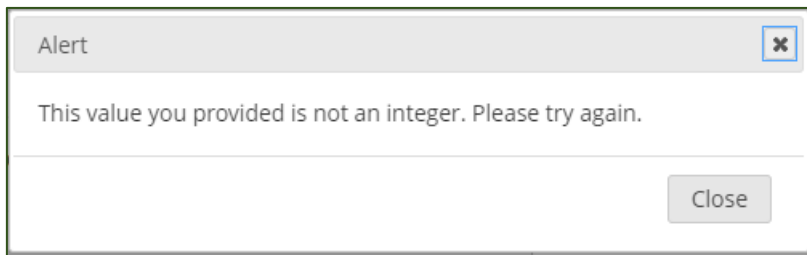
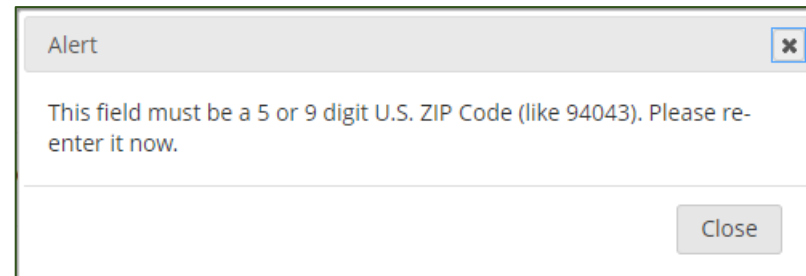
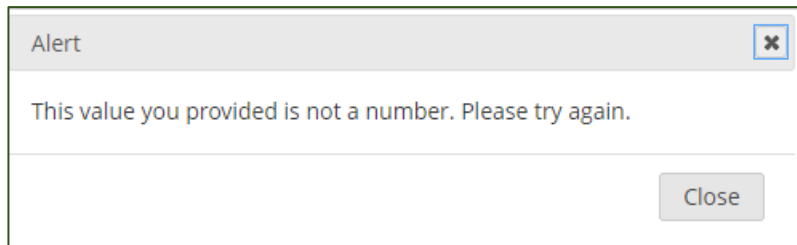
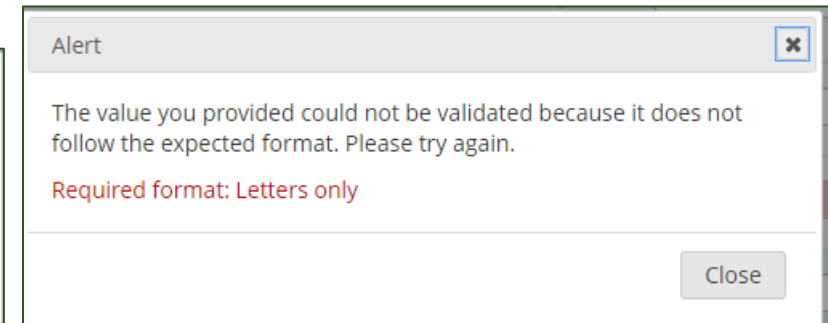
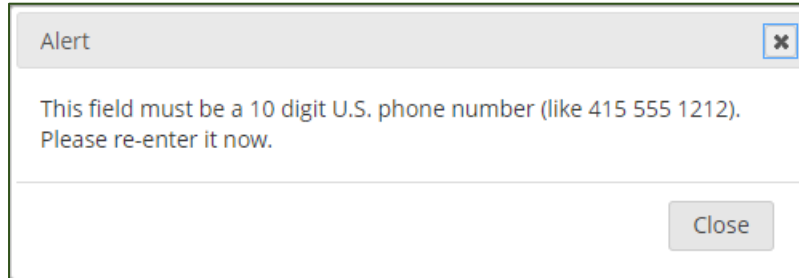
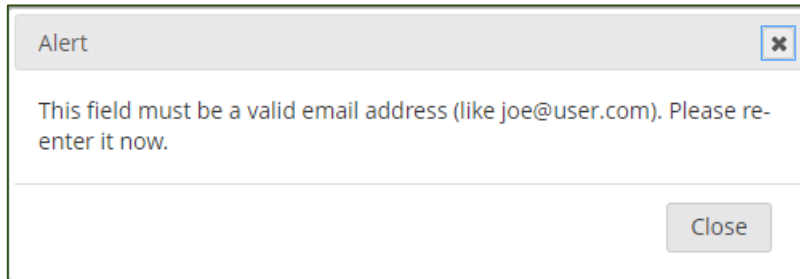
Ranking: [What is a ranked matrix of fields?](#)
 Allow only 1 choice to be selected per column (radio buttons only)

Matrix group name: ONLY letters, numbers, and underscores
gad_sc

Field Validation

An easy way to avoid un-necessary data collection errors is to utilize field validation whenever possible.

Field validation ensures that for certain fields, a user doesn't enter incorrect data type. If they do, an error message will pop up and ask that the mistake is corrected.



When to validate?

- Dates & Times
- Email Address
- Numbers & Integers
- Letters Only
- MRN
- Phone Numbers
- Zip Codes

The image shows a software interface for field validation. A dropdown menu is open, displaying a list of validation types. The menu is currently set to 'None'. The list includes:

- None ---
- Date (D-M-Y)
- Date (M-D-Y)
- Date (Y-M-D)
- Datetime (M-D-Y H:M)
- Datetime (Y-M-D H:M)
- Datetime w/ seconds (M-D-Y H:M:S)
- Datetime w/ seconds (Y-M-D H:M:S)
- Email
- Integer
- Letters only
- MRN (10 digits)
- MRN (generic)
- Number
- Number (1 decimal place - comma as decimal)
- Number (1 decimal place)
- Number (2 decimal places - comma as decimal)
- Number (2 decimal places)
- Number (3 decimal places - comma as decimal)
- Number (3 decimal places)
- Number (4 decimal places - comma as decimal)
- Number (4 decimal places)
- Phone (North America)
- Time (HH:MM)
- Time (MM:SS)
- Zipcode (U.S.)

Background controls visible include:

- Validation?** (optional) --- None ---
- Required?*** No Yes
* Prompt if field is blank
- Identifier?** No Yes
Does the field contain identifying information?
- Custom Alignment**
Align the position of the field on the page
- Field Note** (optional)
Small reminder text displayed when the field is blank

Quasi-Required Fields

REDCap has the ability to make certain fields required but sometimes due to the sensitive nature of a question, it may be inappropriate to force an answer. What do you do when you have a sensitive question and **really want participants to answer** but don't want to make the field mandatory?

Quasi-Required Fields

Suppose we really want to know about alcohol abuse in the household but we're not going to make it a required field. We just want to be sure that people don't mistakenly/unintentionally skip that question

One solution is to add a new descriptive text field with branching logic set so that it only appears if the alcohol question is blank while the question that follows is not blank

The screenshot shows a survey form with three question sections. The first section is titled "Sex" and includes a red asterisk and the text "* must provide value". It has two radio buttons: "Female" (selected) and "Male". A "reset" link is on the right. The second section is titled "Does anyone in the household abuse alcohol?" and has two radio buttons: "Yes" and "No". A "reset" link is on the right. The third section is highlighted in light green and contains a red warning message: "Wait!!! Did you intend to leave the prior question blank? If not, please answer. Thank you!". Below the message is a question "Are there any pets in the house?" with two radio buttons: "Yes" and "No" (selected). A "reset" link is on the right. At the bottom center is a "Submit" button.

Quasi-Required Fields

Variable: fname

First Name

Add Field

Variable: lname

Last Name

Add Field

Variable: sex

Sex

* must provide value

Female Male

Add Field

Variable: alc

Does anyone in the household abuse alcohol?

Yes No

Add Field

Variable: pets

Are there any pets in the house?

Yes No

Advanced Branching Logic Syntax

Show the field ONLY if...

```
[pets] <> "" and [alc] = ""
```



Variable: lname

Last Name

Add Field Add Matrix of Fields

Variable: sex

Sex

* must provide value

Female Male

reset

Add Field Add Matrix of Fields

Variable: alc

Does anyone in the household abuse alcohol?

Yes No

reset

Add Field Add Matrix of Fields

Variable: warn Branching logic: [pets] <> "" and [alc] = ""

Wait!!! Did you intend to leave the prior question blank? If not, please answer. Thank you!

Add Field Add Matrix of Fields

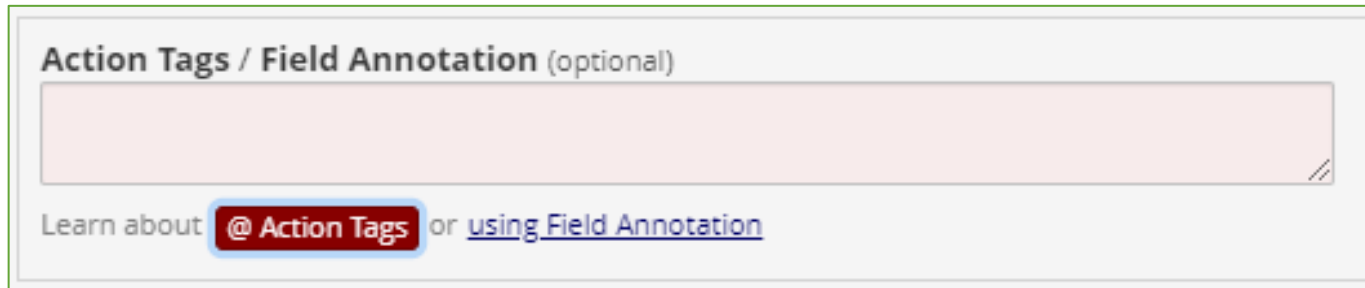
Variable: pets

Are there any pets in the house?

Yes No

Action Tags are an excellent way to customize the data entry experience for surveys and forms. They are special terms that begin with the '@' sign that can be placed inside a field's Field Annotation when adding or editing a field. Each action tag has a corresponding action that is performed for the field when displayed on data entry forms and survey pages.

@ Action Tags



The screenshot shows a form field titled "Action Tags / Field Annotation (optional)". The field is a large, empty, light pink rectangular box with a small double-slash icon in the bottom right corner. Below the field, there is a link that says "Learn about @ Action Tags or using Field Annotation". The "@ Action Tags" part of the link is highlighted with a red background and white text.

Types of Action Tags

Auto Fill Tags - Pre-fill a variable with a value

Cosmetic Tags - Change the look and feel of a variable without impacting the data

Entry Limit Tags - limit what can be entered in a variable

External Module Tags - added by an external module

Mobile App Tags - only useful when using the mobile app

Concealing Tags - either outright hide a variable or make it uneditable

Action Tags

Auto Fill

@DEFAULT
@LATITUDE
@LONGITUDE
@NOW
@TODAY
@USERNAME

Cosmetic

@PASSWORDMASK
@PLACEHOLDER
@RANDOMORDER
@HIDEBUTTON

Entry Limits

@CHARLIMIT
@WORDLIMIT
@MAXCHECKED
@NONEOFTHEABOVE
@MAXCHOICE
@HIDECHOICE

Concealing

@HIDDEN
@HIDDEN-FORM
@HIDDEN-SURVEY
@READONLY
@READONLY-FORM
@READONLY-SURVEY

Action Tag Examples

Edit Field

You may add a new project field to this data collection instrument form on this page. For an overview of the different field types available

Field Type:

Field Label

What is your favorite flavor of ice cream?

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

- 1, Chocolate
- 2, Coffee
- 3, Strawberry
- 4, Vanilla
- 5, Cookies & Cream
- 6, Peanut Butter Cup
- 7, Mint Chocolate Chip
- 8, I don't like ice cream

Action Tags / Field Annotation (optional)

```
@MAXCHECKED=4  
@NONEOFTHEABOVE=8
```

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

@MAXCHECKED

What is your favorite flavor of ice cream?

- Chocolate
- Coffee
- Strawberry
- Vanilla
- Cookies & Cream Cannot select choice! The maximum number of choices has been selected.
- Peanut Butter
- Mint Chocolate Chip
- I don't like ice cream

@NONEOFTHEABOVE

What is your favorite flavor of ice cream?

- Chocolate
- Coffee
- Strawberry
- Vanilla
- Cookies & Cream
- Peanut Butter Cup
- Mint Chocolate Chip
- I don't like ice cream

Incompatible checkbox selection

The option "I don't like ice cream" can only be selected by itself. Selecting this option will clear your previous selections for this checkbox field. Are you sure?

Yes, clear other selections

Cancel

II. Customizing the Researcher Experience

- Data Structure - Wide vs Long format
- Alerts & Notifications
- Custom Record Label
- Custom Record Dashboard
- Creating Reports

Case Study



Suppose we're conducting a research project that collects some demographic data and administers a survey at baseline. We also want to administer the same survey again at 1 month & 3 months to each participant...

You might be tempted to set up your project like this

- One instrument to collect demographic data
- 3 versions of the same survey, to be administered at each of the different timepoints – baseline, 1month and 3months
- Longitudinal data collection has not been enabled.

Setting up your project in this manner stores your data in a wide format.

Data Collection Instruments		Survey options:		Add new instrument:		
		Survey Queue	Survey Login	Create	a new instrument from scratch	
		Survey Notifications		Import	a new instrument from the official REDCap Shared Library ?	
		Upload or download Auto Invitations		Upload	instrument ZIP file from another project/user or external libraries ?	
Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options	
Demographics	4			Choose action ▾	Survey settings	+ Automated Invitations
GAD7 Baseline Survey	8			Choose action ▾	Survey settings	+ Automated Invitations
GAD7 1 Month Survey	8			Choose action ▾	Survey settings	+ Automated Invitations
GAD7 3 Month Survey	8			Choose action ▾	Survey settings	+ Automated Invitations

Main project settings

Disable Use surveys in this project? ?

Enable Use longitudinal data collection with defined events? ?

[Modify project title, purpose, etc.](#)

Record ID	Demographics	GAD7 Baseline Survey	GAD7 1 Month Survey	GAD7 3 Month Survey
1				

Wide Data Format

There is 1 row per participant and repeat columns are used to handle the repeated measures.

A survey with just 8 questions, administered 3x, would have 36 columns when data is exported and would reach to column AK in MS Excel.

Pros:

- Can work well with certain study designs
 - Pre-post design measuring 1 outcome before & after an intervention

Cons:

- Outcomes live in numerous columns – hard to summarize
- Quickly gets clunky and difficult to manage with many outcomes over many events – can be limitations to analysis

An alternative, superior way of setting up the same project is to create your demographics instruments and only include 1 copy of the survey you intend to administer. Longitudinal data collection with defined events must be enabled. Events have been defined and instruments have been designated for each event. The demographics instrument is only administered at baseline. The survey is administered during each event.

Data Collection Instruments

Survey options: [Survey Queue](#) [Survey Login](#) [Survey Notifications](#) [Upload or download Auto Invitations](#)

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	Enabled as survey	Instrument actions	Survey-related options
Demographics	4			Choose action	<input checked="" type="checkbox"/> Survey settings + Automated Invitations
GAD7 Survey with Events	8			Choose action	<input checked="" type="checkbox"/> Survey settings + Automated Invitations

Main project settings

Use surveys in this project?

Use longitudinal data collection with defined events?

Define your events and designate instruments for them

Create events for re-using data collection instruments and/or set up scheduling.

Go to [Define My Events](#) or [Designate Instruments for My Events](#)

	Event #	Event Name	Custom Event Label (optional)	Unique event name (auto-generated)
	1	Baseline		baseline_arm_1
	2	Month 1		month_1_arm_1
	3	Month 3		month_3_arm_1
Add new event		<input type="text"/>	<input type="text"/>	
		<small>Descriptive name for this event</small>	<small>Custom Event Label (optional) Example: [visit_date], [weight] kg</small>	

[Begin Editing](#) [Save](#)

Data Collection Instrument	Baseline (1)	Month 1 (2)	Month 3 (3)
Demographics (survey)			
GAD7 Survey with Events (survey)			

Long Data Format

Pros of Long Format:

- Just 1 column per outcome – easier to summarize over time
- Adding another visit requires only adding a new row (rather than adding many new columns)
- Fast & Flexible
- In most cases is the Gold standard for data collection

All data (all records and fields)

Record ID record_id	Event Name redcap_event_name	Survey Identifier redcap_survey_identifier	Survey Timestamp demographics_timestamp	Name name	Primary Language lang_prim	Other Language lang_oth	Complete? demographics_complete	Survey Timestamp gad7_survey_with_events_timestamp	Date date_baseline1	1. Feeling nervous, anxious, or on edge gad1	2. Not being able to stop or control worrying gad2	3. Worrying too much about different things gad3	4. Trouble relaxing gad4	5. Being so restless that it's hard to sit still gad5	6. Becoming easily annoyed or irritable gad6	7. Feeling afraid as if something awful might happen gad7	Complete? gad7_survey_with_events_complete
<u>1</u>	Baseline		09-11-2021 16:24	Joe	English (1)		Complete (2)	09-11-2021 16:24	2021-09-11	Not at all sure (0)	Several days (1)	Several days (1)	Over half the days (2)	Over half the days (2)	Nearly every day (3)	Several days (1)	Complete (2)
<u>1</u>	Month 1							09-11-2021 16:24	2021-10-11	Not at all sure (0)	Not at all sure (0)	Several days (1)	Several days (1)	Over half the days (2)	Over half the days (2)	Nearly every day (3)	Complete (2)
<u>1</u>	Month 3								2021-12-11	Several days (1)	Over half the days (2)	Several days (1)	Not at all sure (0)	Several days (1)	Over half the days (2)	Nearly every day (3)	Complete (2)

Given the chance, longitudinal study design with designated events to create output in long format is ideal



Alerts & Notifications



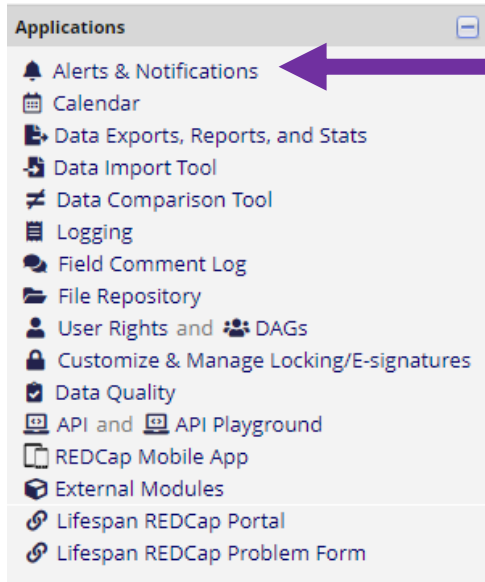
Allows you to construct alerts and send customized notifications. These notifications may be sent to one or more recipients and can be triggered or scheduled when a form/survey is saved and/or based on conditional logic whenever data is saved or imported.

While similar in many respects to Automated Survey Invitations, Alerts & Notifications allow for greater complexity and have more capabilities. For example, alerts apply to both data entry forms and surveys, and they also allow for more options regarding who can be the recipient of a notification (project users, survey participants, etc.).

Create New Alert

Step 1

- Triggering the Alert



Applications

- Alerts & Notifications
- Calendar
- Data Exports, Reports, and Stats
- Data Import Tool
- Data Comparison Tool
- Logging
- Field Comment Log
- File Repository
- User Rights and DAGs
- Customize & Manage Locking/E-signatures
- Data Quality
- API and API Playground
- REDCap Mobile App
- External Modules
- Lifespan REDCap Portal
- Lifespan REDCap Problem Form

Alerts & Notifications

The Alerts & Notifications feature allows you to construct an alert and can be triggered or scheduled when a form/survey is saved. To create an alert, you will need to 1) set how the alert gets triggered, 2) set the recipient, sender, message text, and other settings for the alert, and 3) set the field variables (including Smart Variables), and uploading a notification template.

My Alerts

Notification Log

+ Add New Alert

Create new alert

You may define the settings for your alert in Steps 1-3 below. After clicking the Save button at the bottom, your alert will immediately become active and may be triggered at any time thereafter. If you would like to remove or stop using an alert, it may be deactivated at any time. You may modify an existing alert at any time, even after some notifications have already been sent or scheduled.

Title of this alert:

STEP 1: Triggering the Alert

- A) How will this alert be triggered?
- When a record is saved on a specific form/survey*
 - When a record is saved on a specific form/survey with conditional logic*
 - Using conditional logic during a data import or data entry

B) Trigger the alert...

when is saved with any form status (excludes data imports)

C) Trigger Limit: Trigger the alert...

(The trigger limit determines where and to what extent within a record that the alert will be triggered.)

* The alert will not be re-triggered if the form/survey is saved again, unless it is set to send Every time in Step 2 below.

Step 2

- Set up alert schedule

STEP 2: Set the Alert Schedule

When to send the alert?

- Send immediately
- Send on next at time H:M
- Send the alert days hours minutes
 the alert has been triggered
- Send at exact date/time:

Send it how many times?

- Just once
- Every time the form/survey in Step 1B is
(excludes data imports)
- Multiple times on a recurring basis:
 - Send every days after initially being sent.
 - Send up to times total (including the first time sent). *Leave blank to continue sending forever.*

Alert expiration:
(optional)

This alert will be auto-deactivated at the specified date/time above. Note: This will cause any already-scheduled notifications not to be sent after the expiration time.

Step 3

- Message settings

STEP 3: Message Settings

Email From:
* must provide value

Display name (optional)

Email To:
* must provide value

Select recipients

+ [Show more options](#)

Or manually enter emails:

Subject:
* must provide value

Message:
* must provide value

Prevent piping of data for Identifier fields [?](#)

Paragraph **B** *I*

Example Alert

Postpartum Depression Scale Resize font: |

Please complete the survey below.

Thank you!

Over the past two weeks, how often have you

	Never	Rarely	Some of the time	Often	All of the time
1) Had trouble sleeping?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2) Had trouble staying awake?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3) Felt hopeless?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4) Felt confident?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5) Felt suicidal?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

[Submit](#)

B) Trigger the alert...

when "Postpartum Depression Scale"

while the following logic is true:

[pp_suic] = "5"

× [staff_email] "Staff Email"

Or manually enter emails: jane@example.com; john@mysite.org

Follow-up Required

Paragraph

B

I

Please follow up with record ID [record_id] and ensure that everything is okay

My Alerts | **Notification Log**

Notification Log
(in ascending order by time sent)

View past notifications | View future notifications

Displaying 1 - 1 of 1

Begin time: End time: 10/24/2021 19:13 (M/D/Y H:M)

Display: All alerts | Display: All records | Apply filters | Reset

Notification send time	Alert	View Notification	Record	Recipient	Subject
10/24/2021 11:45am	#1		2	jrichardson7@lifespan.org	Follow-up Required

Follow-up Required

Label: Inbox

R

redcapsupport@lifespan.org

Sun 10/24/2021 11:45 AM

To: Richardson, Jeffrey

Please follow up with record ID 2 and ensure that everything is okay

[Reply](#)

[Forward](#)

Custom Record Label


Append other data and/or static text next to any record name. Allows you to view additional information from within the record status dashboard.

Create a Custom Record Label

[+ Add new record](#)

Displaying: Instrument status only

Record ID	Survey
1	<input type="radio"/>
2	<input type="radio"/>
3	<input type="radio"/>
4	<input type="radio"/>
5	<input type="radio"/>
6	<input type="radio"/>
7	<input type="radio"/>
8	<input type="radio"/>
9	<input type="radio"/>
10	<input type="radio"/>
11	<input type="radio"/>
12	<input type="radio"/>
13	<input type="radio"/>
14	<input type="radio"/>
15	<input type="radio"/>
16	<input type="radio"/>
17	<input type="radio"/>
18	<input type="radio"/>

 **Enable optional modules and customizations**

Optional

- Repeatable instruments [?](#)
- Auto-numbering for records [?](#)
- Scheduling module (longitudinal only) [?](#)
- Randomization module [?](#)
- Designate an email field for sending survey invitations [?](#)

←

Additional customizations

You may use the options below to make customizations to the project. When done, click Save to s

Set a Custom Record Label

You may append other data and/or static text to any record name (e.g., Study ID) as the instruments, such as inside the drop-down lists when choosing a record and at the top the text you wish to display below, and place any variable names inside square bracket variables for that record will replace the variable in the text.

Custom Record Label:

Example: if ([last_name], [first_name]) where entered, then for record '102' it would display '102 (Doe, Jon)'.

[+ Add new record](#)









Displaying: Instrument status only

Record ID	Survey
1	Group C, Female <input type="radio"/>
2	Group B, Female <input type="radio"/>
3	Group A, Male <input type="radio"/>
4	Group B, Male <input type="radio"/>
5	Group C, Male <input type="radio"/>
6	Group A, Male <input type="radio"/>
7	Group C, Male <input type="radio"/>
8	Group C, Male <input type="radio"/>
9	Group C, Female <input type="radio"/>
10	Group B, Female <input type="radio"/>
11	Group A, Male <input type="radio"/>
12	Group B, Female <input type="radio"/>
13	Group A, Female <input type="radio"/>
14	Group B, Female <input type="radio"/>
15	Group C, Female <input type="radio"/>
16	Group A, Male <input type="radio"/>
17	Group C, Male <input type="radio"/>
18	Group B, Male <input type="radio"/>
19	Group B, Male <input type="radio"/>

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
-  Many statuses (mixed)
-  Inco
-  Part
-  Com
- 

Dashboard displayed: [Default dashboard]

[Create custom dashboard](#)

Displaying record Page 1 of 1: "1" through "19" of 19 records

ALL (19) records per page

Custom Record Dashboard

- Include/exclude specific instruments
- Filter the records displayed based on conditional logic
- Sort the records by the value of a specific field

Custom Record Dashboard

Dashboard displayed: [Default dashboard] Create custom dashboard

Displaying record Page 1 of 1: "1" through "19" of 19 records ALL (19) records per page

Custom Record Dashboard

You may create your own custom version of the Record Status Dashboard by setting up the configuration options below. Only users with Project Setup/Design privileges will be able to create custom dashboards. Once a custom dashboard has been created, it will be viewable to all users in the project.

Dashboard title: Group C Females over 50

Description / instructions:
(Optional) Displayed near top of page

Header orientation: Horizontal (default) Use 'Vertical' to transpose headers for a more compact display.

Select instruments:

Filter logic: [sex] = '2' and [grp] = '3' and [age] >= 50
(Optional) Filter the records displayed based on conditional logic
(e.g., [age] > 30 and [sex] = "1")
Valid

Sort by: record_id "Record ID" in Descending order
Sort the records by the value of a specific field in either ascending or descending order

Save dashboard [Cancel](#)

Group C Females over 50

Dashboard displayed: Group C Females over 50 Modify

Displaying record Page 1 of 1: "15" through "1" of 3 records

+ Add new record

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

Record ID	Survey
15 Group C, Female	●
9 Group C, Female	●
1 Group C, Female	●

Group C Females over 50

Dashboard displayed: Group C Females over 50 Modify

Displaying record Page 1 of 1: "[Default dashboard]" through "1" of 3 records
Group C Females over 50

REDCap Reports

A decorative graphic consisting of a solid green horizontal bar that spans the width of the slide. Below this bar, on the right side, there are several horizontal lines of varying lengths and colors, including a light green line, a white line, and a thin dark green line, creating a layered, stepped effect.

Create Reports in REDCap

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

[+ Create New Report](#) [My Reports & Exports](#) [Other Export Options](#)

This module allows you to easily view reports of your data, inspect plots and descriptive statistics of your data, as well as export your data to Microsoft Excel, SAS, Stata, R, or SPSS for analysis (if you have such privileges). If you wish to export your *entire* data set or view it as a report, then Report A is the best and quickest way. However, if you want to view or export data from only specific instruments (or events) on the fly, then Report B is the best choice. You may also create your own custom reports below (if you have such privileges) in which you can filter the report to specific fields, records, or events using a vast array of filtering tools to make sure you get the exact data you want. Once you have created a report, you may view it as a webpage, export it out of REDCap in a specified format (Excel, SAS, Stata, SPSS, R), or view the plots and descriptive statistics for that report.

My Reports & Exports				
	Report name	View/Export Options	Management Options	Report ID <small>(auto-generated)</small>
A	All data (all records and fields)	View Report Export Data Stats & Charts		
B	Selected instruments (all records)	Make custom selections		
+ Create New Report ←				

4 Step Process

Step 1: User Access

Step 2: Choose Fields

Step 3: Choose Filters

Step 4: Order the Results

Create Reports in REDCap

Step 1: User Access

STEP 1

+ User Access: Choose who can edit and view this report

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

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

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

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

Step 2: Choose Fields

STEP 2

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

Field 1	record_id "Record ID"		Instrument: Survey	
Field 2	fname "First Name"		Instrument: Survey	
Field 3	lname "Last Name"		Instrument: Survey	
Field 4	Type variable name or field label			

Additional Report Options

STEP 2

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

Field 1	record_id "Record ID"		Instrument: Survey	
Field 2	fname "First Name"		Instrument: Survey	
Field 3	lname "Last Name"		Instrument: Survey	
Field 4	flavor "What is your favorite flavor of ice"		Instrument: Visit Data	
Field 5	Type variable name or field label			

Additional report options (optional)

- Include the survey identifier field and survey timestamp field(s)
- Combine checkbox options into single column of only the checked-off options (will be formatted as a text field when exported to stats packages)
- Remove line breaks/carriage returns from all text data values (only applicable for CSV Raw and CSV Label data exports)

Combine Checkbox Options

REDCap Reports



Additional report options (optional)

- Include the survey identifier field and survey timestamp field(s)?
- Combine checkbox options into single column of only the checked-off options (will be formatted as a text field when exported to stats packages)
- Remove line breaks/carriage returns from all text data values (only applicable for CSV Raw and CSV Label data exports)

First Name fname	Last Name lname	What is your favorite flavor of ice cream?							
		Chocolate flavor__1	Coffee flavor__2	Strawberry flavor__3	Vanilla flavor__4	Cookies & Cream flavor__5	Peanut Butter Cup flavor__6	Mint Chocolate Chip flavor__7	I don't like ice cream flavor__8
Marie	Curie	Checked (1)	Checked (1)	Unchecked (0)	Unchecked (0)	Unchecked (0)	Unchecked (0)	Unchecked (0)	Checked (1)
Carolyn	Porco	Checked (1)	Unchecked (0)	Checked (1)	Unchecked (0)	Unchecked (0)	Checked (1)	Checked (1)	Unchecked (0)
Richard	Feynman	Checked (1)	Unchecked (0)	Checked (1)	Checked (1)	Unchecked (0)	Unchecked (0)	Checked (1)	Unchecked (0)
Louis	Debroglie	Unchecked (0)	Checked (1)	Unchecked (0)	Unchecked (0)	Unchecked (0)	Unchecked (0)	Unchecked (0)	Unchecked (0)
George	Gamow	Unchecked (0)	Checked (1)	Unchecked (0)	Unchecked (0)	Unchecked (0)	Unchecked (0)	Unchecked (0)	Unchecked (0)



Additional report options (optional)

- Include the survey identifier field and survey timestamp field(s)?
- Combine checkbox options into single column of only the checked-off options (will be formatted as a text field when exported to stats packages)
- Remove line breaks/carriage returns from all text data values (only applicable for CSV Raw and CSV Label data exports)

First Name fname	Last Name lname	What is your favorite flavor of ice cream? flavor
Marie	Curie	Chocolate, Coffee, I don't like ice cream (1, 2, 8)
Carolyn	Porco	Chocolate, Strawberry, Peanut Butter Cup, Mint Chocolate Chip (1, 3, 6, 7)
Richard	Feynman	Chocolate, Strawberry, Vanilla, Mint Chocolate Chip (1, 3, 4, 7)
Louis	Debroglie	Coffee (2)
George	Gamow	Coffee (2)

Create Reports in REDCap

Step 3: Choose Filters

STEP 3

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

Filters (optional)

Filter 1	Operator / Value
<input type="text" value="-- select a field --"/>	<input type="text"/>

Switch format: [Use advanced logic](#)

Step 4: Order the Results

STEP 4

Order the Results (optional)

First by	<input type="text" value="age 'Age'"/>	<input type="text" value="Descending order"/>
Then by	<input type="text" value="Type variable name or field label"/>	<input type="text" value="Ascending order"/>
Then by	<input type="text" value="Type variable name or field label"/>	<input type="text" value="Ascending order"/>

✓ Your report has been saved!

The report named "Group C Females Over 50" has been successfully saved.

[View report](#)

[Return to My Reports & Exports](#)

[Continue editing report](#)

Group C Females Over 50

Record ID record_id	First Name fname	Last Name lname	Age age	Sex sex	Group grp
15 Group C, Female	Vera	Rubin	77	Female (2)	Group C (3)
1 Group C, Female	Marie	Curie	55	Female (2)	Group C (3)
9 Group C, Female	Lisa	Randall	51	Female (2)	Group C (3)

III. General Advice & Suggestions

- Move to Production
- Copy project prior to making changes
- Prevent abandoned projects
- Delete old projects
- Disable auto-fill settings
- Q & A

Moving your project to Production once you start collecting study data ensures you're maintaining data accuracy and integrity. The post-production change control process provides an additional check to ensure that data which has already been collected is not deleted, re-coded or overwritten unintentionally.

Move your project into production

To prevent yourself from making any catastrophic changes, move your project into production once you have completed setting everything up and are ready for data collection to begin

Production vs Development



Complete!

Move your project to production status

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

You can still move your project to production, even if data collection has already begun as REDCap will give you the option to keep the existing data or delete it:

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. (1 records)

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 be auto-approved or else might need to be approved by a REDCap administrator before taking effect.

Quiz... Is the following statement True or False?

- *If I move my project into production, I will no longer be able to make changes to it....* **FALSE!**

Changes can be made to your project once in Production by going to the Online Designer and entering Draft Mode.

Once in Draft Mode, you can make whatever changes you need. Once submitted, if the changes won't affect any existing data, they'll be approved automatically. If the changes may affect your existing data in any way, they'll be routed to the REDCap Admin team for review and approval.

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

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

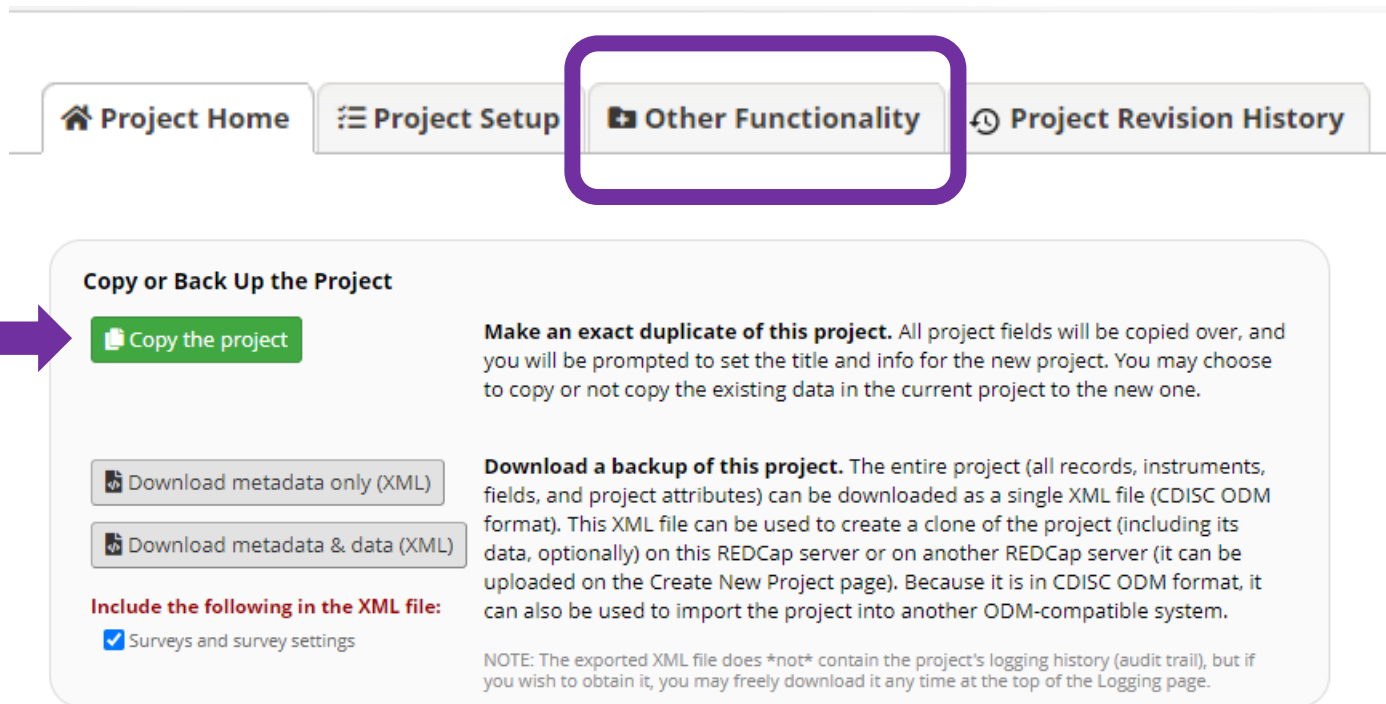
Enter Draft Mode

Copy project prior to making changes

Suppose we want to make a change to our project but we're not sure if there will be any unforeseen consequences. We can make a copy of our project to experiment in while leaving our original project untouched.


Dilemma

- Will the changes I want to make alter the data I've already collected?





The screenshot shows the 'Other Functionality' menu in REDCap. The menu items are: Project Home, Project Setup, Other Functionality (highlighted with a purple box), and Project Revision History. Below the menu, the 'Copy or Back Up the Project' section is visible. A purple arrow points to the 'Copy the project' button. The 'Copy the project' button is green and contains a document icon. Below it are two buttons for downloading XML files: 'Download metadata only (XML)' and 'Download metadata & data (XML)'. There is also a section for 'Include the following in the XML file:' with a checked checkbox for 'Surveys and survey settings'. A note at the bottom states: 'NOTE: The exported XML file does *not* contain the project's logging history (audit trail), but if you wish to obtain it, you may freely download it any time at the top of the Logging page.'

Copy or Back Up the Project

 **Copy the project**

Make an exact duplicate of this project. All project fields will be copied over, and you will be prompted to set the title and info for the new project. You may choose to copy or not copy the existing data in the current project to the new one.

 **Download metadata only (XML)**

 **Download metadata & data (XML)**

Include the following in the XML file:

Surveys and survey settings

NOTE: The exported XML file does *not* contain the project's logging history (audit trail), but if you wish to obtain it, you may freely download it any time at the top of the Logging page.

Make a Copy of the Project

To make an exact duplicate of the current project ("Events vs Instruments Wide"), set the details below for the new project you are creating, and click the button at the bottom. This will copy over all project forms and their fields, and optionally, you may also copy the current users and any reports that have been created.

Project title:

Title to be displayed on project webpage

Purpose of this project:

How will it be used?

Project notes (optional):

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

Also copy the following:
(optional)

- All records/responses (**19 records total**)
- All users and user rights
- All users roles
- All reports
- All report folders
- All data quality rules
- All Project Folders
- All settings for Survey Queue and Automated Survey Invitations
- Note: Automated Invitations will all be set to 'Not Active' status in the new project.
- All project bookmarks
- All custom record status dashboards
- All settings for External Modules (modules will be disabled by default)
- All alerts & notifications
- Note: Alerts & Notifications will all be set to 'Deactivated' status in the new project.

[Select All](#) | [Deselect All](#)


Prevent Abandoned Projects

Frequently people request access to a project but the PI has moved on to another institution and no other users were added, or they're gone as well.


Best Practice:

- Always *at least* 2 people with setup & design rights


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

 Add new user

— OR —

 Assign new user

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

 Enter new role name

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

- Applications**
- Alerts & Notifications
 - Calendar
 - Data Exports, Reports, and Stats
 - Data Import Tool
 - Data Comparison Tool
 - Logging
 - Field Comment Log
 - File Repository
 - User Rights and DAGs**
 - Customize & Manage Locking/E-signatures
 - Data Quality

Role name (click role name to edit role)	Username or users assigned to a role (click username to edit or assign to role)	Expiration (click expiration to edit)	Project Design and Setup	User Rights	Data Access Groups
—	jrichardson7 (Jeffrey Richardson)	never	✓	✓	✓

Highest level privileges:

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

Add Users to your project

Adding new user "jseanrich"

Basic Rights

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

Highest level privileges:

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

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

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

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

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

Stats & Charts

Other privileges:

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

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
Demographics (survey)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>
GAD7 Baseline Survey (survey)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>
GAD7 1 Month Survey (survey)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>
GAD7 3 Month Survey (survey)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>

External Modules: Configuration Permissions

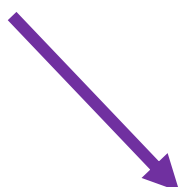
Privileges may be defined regarding whether the user can set or modify the configuration of an External Module that has been enabled on this project. Below are the currently enabled modules. NOTE: Only administrators may modify the module configuration permissions here.

Email Alerts*

*Permissions based on user's Project Design/Setup rights

New User Notification

Notify user of their project access via email?



Delete Old Unused Projects

In order to increase space on the server and to reduce the frequency of unanticipated downtime relating to shortage of disk space, please review and DELETE any old or unused projects. Deleting unused projects should be performed routinely.

Delete Old Unused Projects

The screenshot shows a project management interface with a navigation bar at the top containing: Project Home, Project Setup, Other Functionality (highlighted with a purple box), Project Revision History, and Edit project settings. Below the navigation bar is a 'Project Status Management' section with a flow diagram: Development (current) → Production → Analysis/Cleanup. A button 'Mark project as Completed' is shown with a description: 'If you are finished with a project and wish to make it completely inaccessible, you may mark the project as 'Completed'. Doing so will take it offline and remove it from everyone's project list, after which it can only be seen again by clicking the Show Completed Projects link at the bottom of the My Projects page. Read more'. Below this is a 'Data Management' section with three options: 'Delete the project' (highlighted with a purple arrow), 'Erase all data', and 'Clear the Record List Cache'. Each option has a corresponding description of its function.

Project Home Project Setup **Other Functionality** Project Revision History Edit project settings

Project Status Management

Development (current) → Production → Analysis/Cleanup

Mark project as Completed If you are finished with a project and wish to make it completely inaccessible, you may mark the project as 'Completed'. Doing so will take it offline and remove it from everyone's project list, after which it can only be seen again by clicking the [Show Completed Projects](#) link at the bottom of the *My Projects* page. [Read more](#)

Data Management

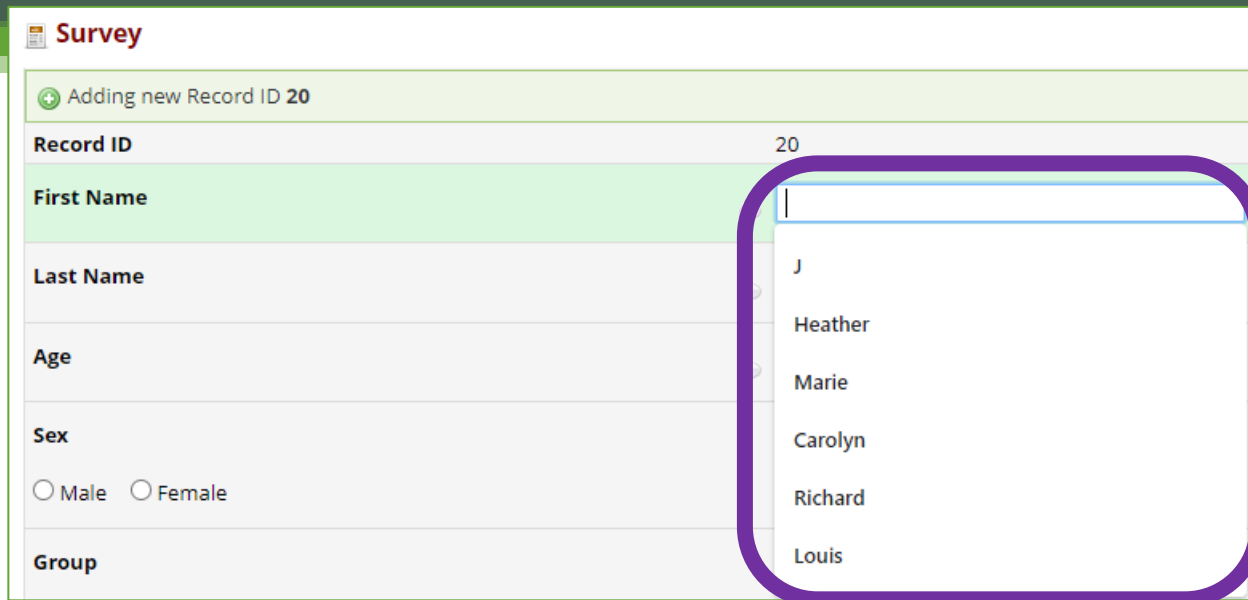
Delete the project You may completely remove this project, in which all its data will be permanently deleted also.

Erase all data You may erase all currently collected data in the project, which includes all calendar events, documents uploaded for records/responses, survey responses (if applicable), and any logging events pertaining to data collection.

Clear the Record List Cache (Administrators only) If there appear to be records missing from the project (in reports, record status dashboards, or elsewhere), then the Record List Cache (a secondary list of all record names) might be out of sync and thus might need to be cleared. Clearing the cache will cause the Record List Cache to regenerate and bring back records that appear to be orphaned/missing in the project. (NOTE: This is normally not needed.)

Multiple compliance issues have been reported recently relating to the inadvertent disclosure of PHI caused by enabled autofill, auto sign-in, and password save web browser settings. Specifically, when research participants were entering data into REDCap survey fields, identifying information belonging to other research participants were populating. This issue is not a REDCap issue, rather an issue caused by having enabled settings on your web browser.

Turn off Auto-fill, Saved Passwords, and Auto Sign-In Settings



Survey

Adding new Record ID 20

Record ID 20

First Name

Last Name

Age

Sex
 Male Female

Group

J
Heather
Marie
Carolyn
Richard
Louis

Action required per Lifespan Office of Research and Lifespan Compliance!

- Ensure autofill, saved passwords, and auto sign-in settings are all disabled.
- Consider using an alternate web-browser for participant surveys, again please first ensure the features described above are disabled.
- It is strongly encouraged to have specific research devices when administering participant surveys.



Thank you!

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