REDCap Features, Tips, & Tricks

Lifespan Biostatistics, Epidemiology, and Research Design Core
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
I. Customizing the Data Entry Experience

- Piping
- Field Embedding
- Matrix of Fields
- Field Validation
- Quasi Required Fields
- Action Tags
Piping is a way (using square brackets) to essentially take a data value and display it somewhere else, i.e., email, field label.
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:** Piping Demo

**Purpose of this project:** Practice / Just for fun

**Assign project to a Project Folder?**

**Project notes (optional):**

**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)

- **Piping Example Project**
  - Contains single data collection instrument enabled as a survey, which contains questions to demonstrate the Piping feature.

- **Progress Bars**
  - Demonstrates examples of how HTML can be incorporated into Section Headers to generate progress bars.

- **Project Tracking Database**
  - Contains fifteen data entry forms dedicated to recording the attributes of and tracking and progress of projects/studies.

- **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

Create Project  Cancel
### Piping Demonstration

<table>
<thead>
<tr>
<th>Variable: first_name</th>
<th>How to embed a field elsewhere</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your first name</td>
<td>* must provide value</td>
</tr>
<tr>
<td></td>
<td>Add Field</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Variable: last_name</th>
<th>How to embed a field elsewhere</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your last name</td>
<td>* must provide value</td>
</tr>
<tr>
<td></td>
<td>Add Field</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Variable: data_today</th>
<th>How to embed a field elsewhere</th>
</tr>
</thead>
<tbody>
<tr>
<td>[first_name], please enter today’s date?</td>
<td>Add Field</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Variable: confirm_name</th>
<th>How to embed a field elsewhere</th>
</tr>
</thead>
<tbody>
<tr>
<td>Please confirm your name</td>
<td>Add Field</td>
</tr>
<tr>
<td>[first_name] Harris</td>
<td></td>
</tr>
<tr>
<td>[first_name] [last_name]</td>
<td></td>
</tr>
<tr>
<td>[first_name] Taylor</td>
<td></td>
</tr>
<tr>
<td>[first_name] deGresse Tyson</td>
<td></td>
</tr>
</tbody>
</table>
Piping Demo

**Blank 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?
- Chocolate
- Vanilla
- Strawberry

Section 2
How much do you like ___ ice cream?

Enter your favorite number

Your favorite number above multiplied by 4 is:

Please confirm your name
- Horns
- 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.

**Completed Form**

Section 1
Your first name
* must provide value

Your last name
* must provide value

Jeff, please enter today's date?

What is your favorite ice cream?
- Vanilla

Section 2
How much do you like Vanilla ice cream?

Enter your favorite number

Your favorite number above multiplied by 4 is:

Please confirm your name
- Horns
- Richardson
- Taylor
- 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

Demographics

Please complete the survey below.

Thank you!

Mother's First Name
Mother's Last Name
Mother's Email
Mother's Age
Father's First Name
Father's Last Name
Father's Email
Father's Age
Child's First Name
Child's Last Name
Child's Email
Child's Age
You may add a new project field to this data collection instrument by completing the fields below and clicking the Save button to form on this page. For an overview of the different field types available, you may view the Field Types video (3 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

- Use the Rich Text Editor
- Table
- Cell
- Row
- Column
- Table properties
- Delete table
<table>
<thead>
<tr>
<th></th>
<th>First</th>
<th>Last</th>
<th>Email Address</th>
<th>Age</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mother</td>
<td>(fname_mom)</td>
<td>(lname_mom)</td>
<td>(email_mom)</td>
<td>(age_mom)</td>
</tr>
<tr>
<td>Father</td>
<td>(fname_dad)</td>
<td>(lname_dad)</td>
<td>(email_dad)</td>
<td>(age_dad)</td>
</tr>
<tr>
<td>Child</td>
<td>(fname_child)</td>
<td>(lname_child)</td>
<td>(email_child)</td>
<td>(age_child)</td>
</tr>
</tbody>
</table>
Demographics

Please complete the survey below.

Thank you!

<table>
<thead>
<tr>
<th></th>
<th>First</th>
<th>Last</th>
<th>Email Address</th>
<th>Age</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mother</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Father</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Child</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cell Properties</td>
<td>General</td>
<td>Advanced</td>
<td></td>
<td></td>
</tr>
<tr>
<td>-----------------</td>
<td>---------</td>
<td>----------</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Width</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Height</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cell type</td>
<td>Cell</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Scope</td>
<td>None</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>H Align</td>
<td>None</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>V Align</td>
<td>None</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Table Content**

<table>
<thead>
<tr>
<th>Field Label</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>First</td>
<td>(fname)</td>
</tr>
<tr>
<td>Last</td>
<td>(lname)</td>
</tr>
<tr>
<td>Email Address</td>
<td>(email)</td>
</tr>
<tr>
<td>Age</td>
<td>(age)</td>
</tr>
</tbody>
</table>

**Table Structure**

- **Father**
  - First: (fname_dad)
  - Last: (lname_dad)
  - Email: (email_dad)
  - Age: (age_dad)

- **Mother**
  - First: (fname_mom)
  - Last: (lname_mom)
  - Email: (email_mom)
  - Age: (age_mom)

- **Child**
  - First: (fname_child)
  - Last: (lname_child)
  - Email: (email_child)
  - Age: (age_child)
<table>
<thead>
<tr>
<th>Mother</th>
<th>First</th>
<th>Last</th>
<th>Email Address</th>
<th>Age</th>
</tr>
</thead>
<tbody>
<tr>
<td>Father</td>
<td>First</td>
<td>Last</td>
<td>Email Address</td>
<td>Age</td>
</tr>
<tr>
<td>Child</td>
<td>First</td>
<td>Last</td>
<td>Email Address</td>
<td>Age</td>
</tr>
</tbody>
</table>
Field Embedding Use Case #2

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
- Barbecue Chicken
- Olive
- Other

Other Pizza
- Favorite Pizza Topping
- Pepperoni
- Sausage
- Mushroom
- Onion
- Green Pepper
- Extra Cheese
- Pineapple
- Buffalo Chicken
- Barbecue Chicken
- Olive
- Other
**Remember, you must first create the fields before they can be embedded elsewhere!**
Field Embedding Example Project Template
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.
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 $\frac{1}{4}$th the space
Add a Matrix of Fields

- To get started, within the Online Designer, click ‘Add Matrix of Fields’
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
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
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.
Quasi-Required Fields

- **Advanced Branching Logic Syntax**
  - Show the field ONLY if...
  - \([\text{pets}] \neq \"\" \) and \([\text{alc}] = \"\")

- **Sex**
  - *must provide value*
  - Female ○ Male

- **Does anyone in the household abuse alcohol?**
  - Yes ○ No

- **Are there any pets in the house?**
  - Yes ○ No

---

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

@MAXCHECKED

@NONEOFTHEABOVE
II. Customizing the Researcher Experience

- Data Structure - Wide vs Long format
- Alerts & Notifications
- Custom Record Label
- Custom Record Dashboard
- Creating Reports
Data structure – how the rows and columns of a dataset are organized to handle your specific study design.

Wide data vs long data format
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 it 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, 1 month and 3 months
• Longitudinal data collection has not been enabled.

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

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

 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

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: add optional title

**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: choose an instrument/survey... is saved with any form status... (excludes data imports)

C) Trigger Limit: Trigger the alert...
only once per record (i.e., never re-trigger)

(The trigger limit determines when 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 Day at time
- Send the alert days hours minutes after the alert has been triggered
- Send at exact date/time: MM/DD/YYYY HH:MM

**Send it how many times?**

- Just once
- Every time the form/survey in Step 1B is saved (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:**

- MM/DD/YYYY HH:MM

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
Example Alert

Postpartum Depression Scale

Please complete the survey below.

Thank you!

Over the past two weeks, how often have you

1) Had trouble sleeping? Never Rarely Sometimes Often All of the time
2) Had trouble staying awake? Never Rarely Sometimes Often All of the time
3) Felt hopeless? Never Rarely Sometimes Often All of the time
4) Felt confident? Never Rarely Sometimes Often All of the time
5) Felt suicidal? Never Rarely Sometimes Often All of the time

Submit

B) Trigger the alert...

when "Postpartum Depression Scale"
while the following logic is true:

[pp_suic] = "5"

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

Follow-up Required

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

Additional customizations

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

- Set a Custom Record Label

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

Custom Record Label: [gpop]. [sex]
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 title: Group C Females over 50

Filter logic: (Optional) Filter the records displayed based on conditional logic. Example: (sex = 'F' and [grp] = '3' and [age] > 50)

Sort by: Sort the records by the value of a specific field in either ascending or descending order.

Dashboard displayed: Group C Females over 50

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

Group C Females over 50

Dashboard displayed: Group C Females over 50

Displaying record: Page 1 of 15 through 1 of 3 records
Create Reports in REDCap

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

- **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
- **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

Step 2: Choose Fields

- **Fields to include in report:**
  - Field 1: record_id "Record ID" (Instrument: Survey)
  - Field 2: f_name "First Name" (Instrument: Survey)
  - Field 3: i_name "Last Name" (Instrument: Survey)
  - Field 4: Type variable name or field label

Additional Report Options

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

**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)

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>What is your favorite flavor of ice cream?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marie</td>
<td>Curie</td>
<td>Chocolate Flavor 1, Coffee Flavor 2, I don’t like ice cream (1, 2, 8)</td>
</tr>
<tr>
<td>Carolyn</td>
<td>Porco</td>
<td>Chocolate, Strawberry, Peanut Butter Cup, Mint Chocolate Chip (1, 3, 5, 7)</td>
</tr>
<tr>
<td>Richard</td>
<td>Feynman</td>
<td>Chocolate, Strawberry, Vanilla, Mint Chocolate Chip (1, 3, 4, 7)</td>
</tr>
<tr>
<td>Louis</td>
<td>Debrie</td>
<td>Coffee (2)</td>
</tr>
<tr>
<td>George</td>
<td>Gemow</td>
<td>Coffee (2)</td>
</tr>
</tbody>
</table>
Create Reports in REDCap

Step 3: Choose Filters

- **Filters (optional)**
  - **Filter 1**
    - Operator / Value
  - **Switch format:** Use advanced logic

- Include the survey identifier field and survey timestamp fields.
- Combine checkbox options into a single column of only the checked-off options (will be formatted as a text field when exported to Excel or PDF).
- Remove line breaks or carriage returns from all text data values (only applicable for CSV, RAW, and CSV Label data exports).

Group C Females Over 50

<table>
<thead>
<tr>
<th>Record ID</th>
<th>First Name</th>
<th>Last Name</th>
<th>Age</th>
<th>Sex</th>
<th>Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>15</td>
<td>Vera</td>
<td>Rubin</td>
<td>77</td>
<td>Female</td>
<td>Group C (3)</td>
</tr>
<tr>
<td>1</td>
<td>Marie</td>
<td>Cune</td>
<td>55</td>
<td>Female</td>
<td>Group C (3)</td>
</tr>
<tr>
<td>9</td>
<td>Lisa</td>
<td>Randall</td>
<td>51</td>
<td>Female</td>
<td>Group C (3)</td>
</tr>
</tbody>
</table>
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
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.

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.
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:
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.
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?
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: Copy of Events vs Instruments Wide
Title to be displayed on project webpage

Purpose of this project: Practice / Just for fun

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

Copy project | Cancel
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 Users to your project
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

Project Status Management

- Development (current)
- Production
- Analysis/Cleanup

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
- Erase all data
- Clear the Record List Cache

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

(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**
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!

Lifespan Biostatistics, Epidemiology, and Research Design Core
redcapsupport@lifespan.org
www.lifespanberd.com