



# REDCap 101 Training

Introduction to building projects in REDCap

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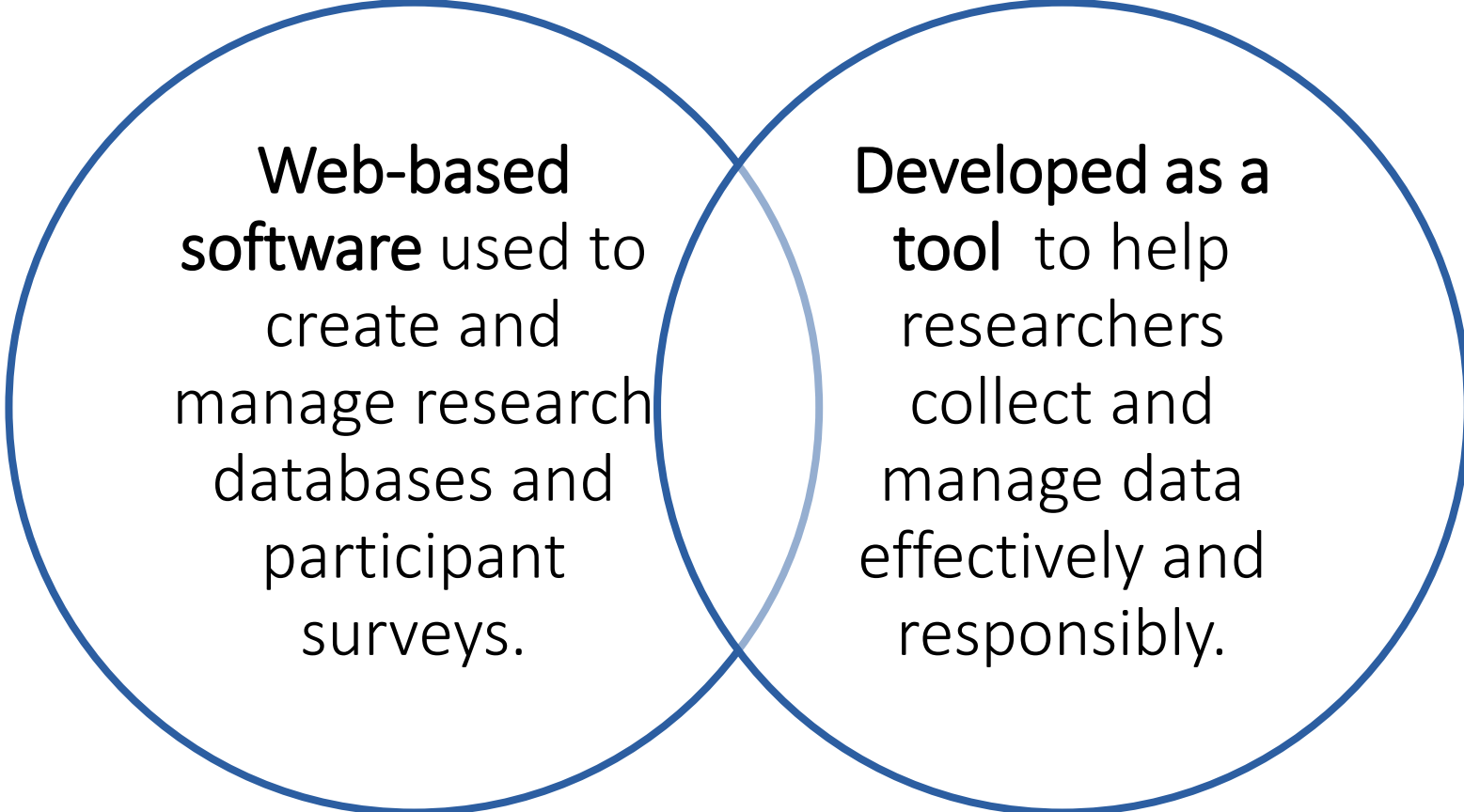


YALE UNIVERSITY  
SCHOOL OF  
MEDICINE

# Introduction and Learning Objective

- Learn how to set up a study account
- Learn where to access training materials
- Understand how to create a new REDCap project
- Learn how to manage user rights
- Demonstrate how to export data to statistical packages

# What is REDCap?



**Web-based software** used to create and manage research databases and participant surveys.

Developed as a **tool** to help researchers collect and manage data effectively and responsibly.

# How do I get set up in REDCap?



To request a new account, select **Request Study Account** on the REDCap@Yale portal website:

<https://portal.redcap.yale.edu/>

- Two REDCap implementations available at Yale:

REDCap at Yale University

Yale  
NewHaven  
Health



Yale Center for  
Clinical Investigation

# REDCap@Yale

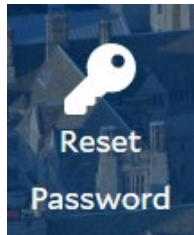
- What is a REDCap@Yale study account?  
*Principal Investigator (PI)*  
*HIC # (if human subjects research)*
- How do I add users?



<b>Step 1</b>	PI or primary contact requests someone be added as a user to REDCap@Yale (only if they do not have access already)
<b>Step 2</b>	New user activates REDCap account by logging in
<b>Step 3</b>	PI or primary contact adds user to their REDCap project

# REDCap@Yale

Yale NetID and password is required for login



- You CANNOT reset password in REDCap. Reset your Yale NETID password through Yale ITS

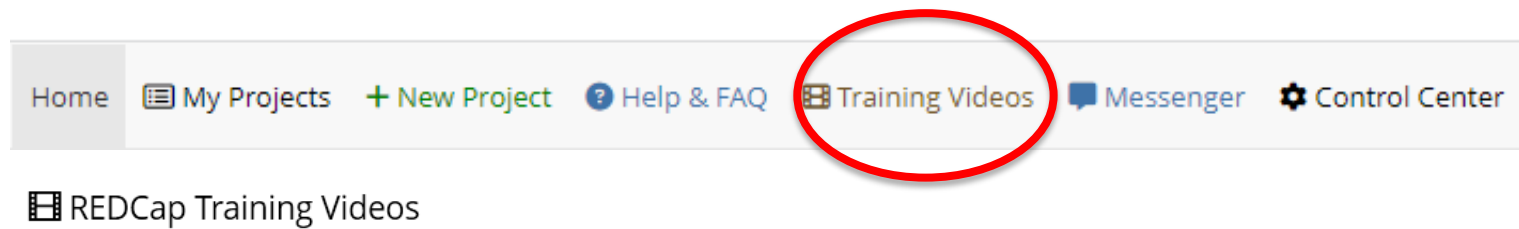
**Question:** *My project involves people outside Yale. How do they login?*

**Answer:** You can provide a Yale NET ID. Refer to the ITS website on how to obtain sponsored NetID for external collaborators.

QUESTIONS?

# Training Resources: Within REDCap

Training Videos: 26 training videos currently available






Home My Projects + New Project Help & FAQ **Training Videos** Messenger Control Center

REDCap Training Videos

## Just Getting Started?

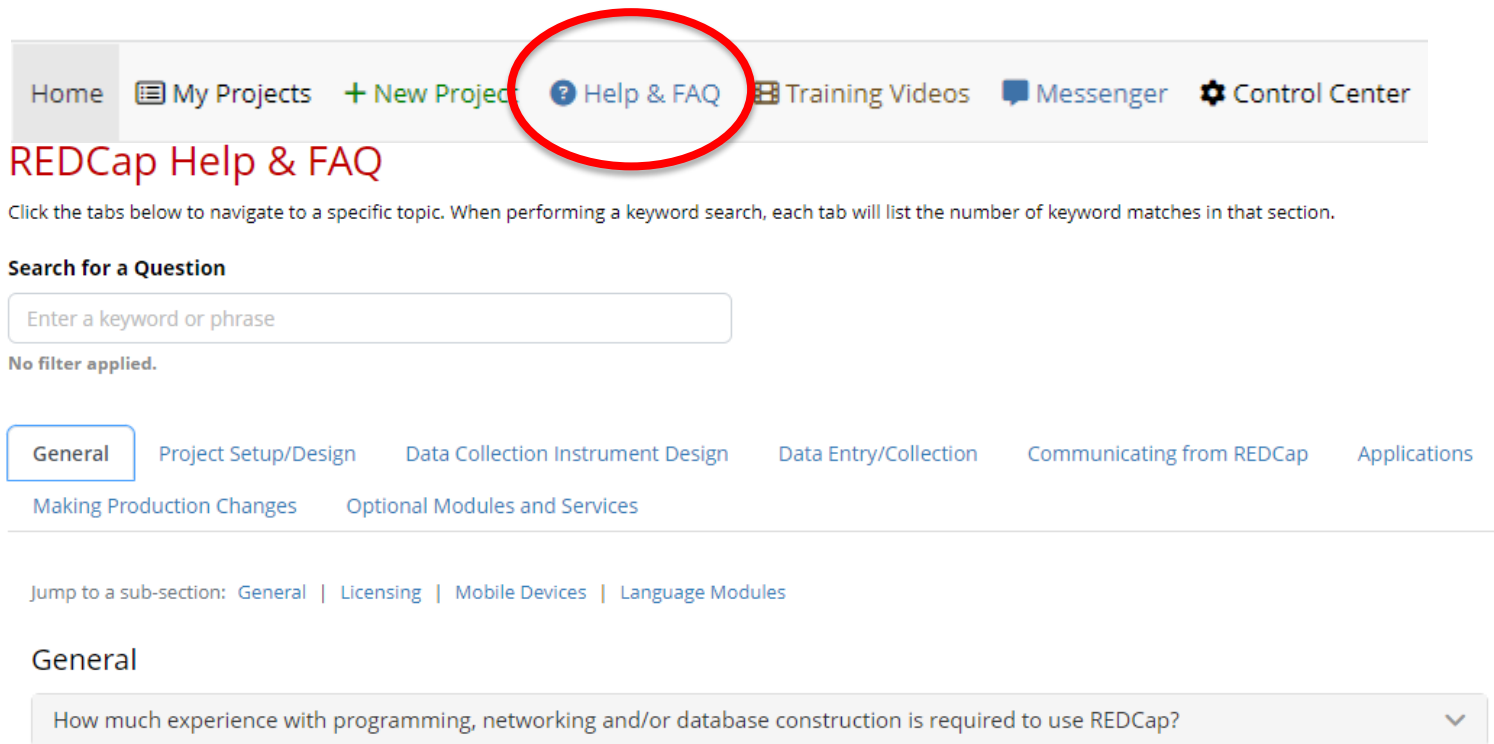
Explore these overviews of fundamental concepts and features.

Title	Description	Watch Video
<b>Brief Overview</b>	A quick summary of what REDCap is and what it can do.	 4 minutes
<b>Detailed Overview</b>	This video provides an overview of basic functions and features within a REDCap project. It will serve as a starting point for learning about the basic concepts of REDCap, what REDCap projects are, how to create them, and how to use them.	 14 minutes
<b>Data Entry Overview</b>	A focused exploration of basic data entry workflow. Suitable for training data entry staff.	 19 minutes



# Training Resources: Within REDCap

Help & FAQ: This is also a good place to look up syntax for calculated field, branching logics or piping.



Home My Projects + New Project **Help & FAQ** Training Videos Messenger Control Center

## REDCap Help & FAQ

Click the tabs below to navigate to a specific topic. When performing a keyword search, each tab will list the number of keyword matches in that section.

**Search for a Question**

No filter applied.

**General** Project Setup/Design Data Collection Instrument Design Data Entry/Collection Communicating from REDCap Applications

Making Production Changes Optional Modules and Services

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Jump to a sub-section: [General](#) | [Licensing](#) | [Mobile Devices](#) | [Language Modules](#)

### General

How much experience with programming, networking and/or database construction is required to use REDCap? ▾

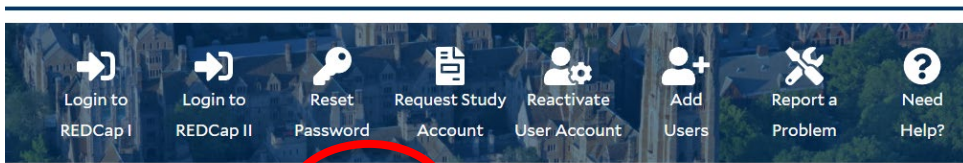
# Training Resources: Within REDCap

'How to' links throughout REDCap. For example, in online designer:

The screenshot displays the REDCap Online Designer interface. At the top, there are navigation tabs: Project Home, Project Setup, Online Designer (active), Data Dictionary, and Codebook. Below the tabs, there are buttons for 'VIDEO: How to use this page' and 'Create snapshot of instruments' with a 'Last snapshot: never' indicator. The main content area contains a paragraph explaining how to build and customize data collection instruments, including instructions on adding, editing, deleting, and reordering fields. Below this text are buttons for 'Return to list of instruments', 'Survey settings', and 'Next instrument'. The current instrument is identified as 'Participant Information', with a 'Preview instrument' button. A field configuration area shows a variable named 'record\_id' with a warning: '\* This field will NOT be displayed on the survey page. \* You should NOT use identifiers (e.g., MRN, SSN) for the record ID field.' Below this is a text input field labeled 'Record ID' and a note: 'NOTE: The field above is the record ID field and thus cannot be deleted or moved. It can only be edited.' At the bottom of the field configuration area are buttons for 'Add Field', 'Add Matrix of Fields', and 'Import from Field Bank'. On the right side, a sidebar contains several 'Learn how to use...' links, with the first one circled in red: 'Learn how to use...' with sub-links for 'Smart Variables', 'Piping', 'Action Tags', 'Field Embedding', and 'Special Functions'. Other sidebar links include 'How to embed a field elsewhere' and 'How to modify multiple fields together'.

# Training Resources: REDCap@Yale Website

Library of step-by-step tutorials to address commonly asked questions from our Yale end-users:



HOME GET HELP ABOUT US **RESOURCES** CONTACT US

HOME > RESOURCES > FAQs

## Frequently Asked Questions

Categories

- Any -

Search Keyword

APPLY

SHOW ALL

### Project Design

- ▶ New Project
- ▼ Appearance and Formatting

[How do I insert an image?](#)

[How do I insert a video?](#)

[How do I customize the appearance of REDCap?](#)



*How do I insert a video?*

*I want to include a video in the survey project I am using for eConsent.*

Videos can be inserted into a REDCap form or survey using the *Descriptive Text* field type and can appear within the form/survey page (inline) or in a separate window (popup). You must first obtain the URL (link) to the video that you want to insert. YouTube and Vimeo are compatible sources, but other video sources can be used as well.

To insert a video into a form/survey:

1. Within the 'Online Designer', add a new field to your form and select the 'Descriptive Text' field type.

#### Add New Field

You may add a new project field to this data collection instrument by completing the form below. When you add a new field, it will be added to the form on this page. For an overview you may view the [Field Types video \(4 min\)](#).

Field Type: Descriptive Text (with optional Image/Video/...

Field Label  Use the Rich Text Editor [?](#)

QUESTIONS?

# VERY BRIEF TOUR

# REDCap: Homepage

Yale University REDCap

## REDCap at Yale University

REDCap@Yale

### OUR MISSION

To promote excellence through empowerment, on an informatics platform that encourages innovation and collaboration.

### ADDITIONAL LINKS

[Check out our portal website](#)

[REDCap@Yale activity charts](#)

### Welcome to REDCap!

REDCap is a secure web platform for building and managing online databases and surveys. REDCap's streamlined process for rapidly creating and designing projects offers a vast array of tools that can be tailored to virtually any data collection strategy.

REDCap provides automated export procedures for seamless data downloads to Excel and common statistical packages (SPSS, SAS, Stata, R), as well as a built-in project calendar, a scheduling module, ad hoc reporting tools, and advanced features, such as branching logic, file uploading, and calculated fields.

Learn more about REDCap by watching a [brief summary video \(4 min\)](#). If you would like to view other quick video tutorials of REDCap in action and an overview of its features, please see the [Training Resources](#) page.

**NOTICE:** If you are collecting data for the purposes of human subjects research, review and approval of the project is required by your Institutional Review Board.

If you require assistance or have any questions about REDCap, please contact the REDCap@Yale team.

### REDCap Features

#### **Build online surveys and databases quickly and securely in your browser -**

Create and design your project using a secure login from any device. No extra software required. Access from anywhere, at any time.

**Fast and flexible** - Go from project creation to starting data collection in less than one day. Customizations and changes are possible any time, even after data collection has begun.

**Advanced instrument design features** - Auto-validation, calculated fields, file uploading, branching/skip logic, and survey stop actions.

**e-Consent** - Perform informed consent electronically for participants via survey.

**Diverse and flexible survey distribution options** - Use a list of email addresses or phone numbers for your survey respondents and automatically contact them with personalized messages, and track who has responded. Or

# REDCap: My Projects

Yale University REDCap



### OUR MISSION

To promote excellence through empowerment, on an informatics platform that encourages innovation and collaboration.

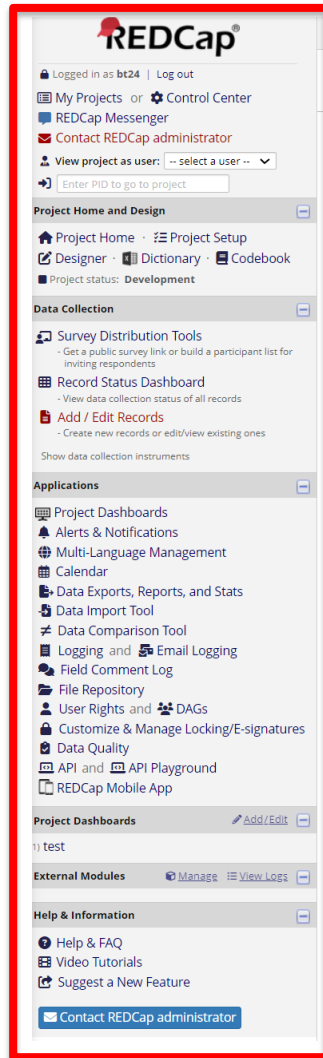
### ADDITIONAL LINKS

Check out our [portal website](#)  
REDCap@Yale [activity charts](#)

Listed below are the REDCap projects to which you currently have access. Click the project title to open the project. [Read more](#) To review which users still have access to your projects, visit the [User Access Dashboard](#).

My Projects		Organize	Collapse All	Filter projects by title		X	🗑️
Project Title	PID	Records	Fields	Instruments	Type	Status	
📁 Unorganized Projects (5)							
- TEST PROJECTS (1)							
Test project Neuro QOL	2362	4	53	1 form 5 surveys	■	🔧	
+ INSPIRE (1)							
+ U19 (12)							
+ PREDICT (1)							

# REDCap: Project Navigation Bar



Access to most parts of REDCap:

- Project design pages
- Data Collection
- Applications
- Reports and Dashboards
- Help and Training

Your Navigation Bar will vary based on your user rights



# REDCap: Project Setup

The screenshot displays the REDCap Project Setup interface for a project named "Test project Neuro QOL" (PID: 2362). The interface is divided into a left sidebar and a main content area. The sidebar contains navigation links for "Project Home and Design", "Data Collection", "Applications", "Project Dashboards", "External Modules", and "Help & Information". The main content area is titled "Test project Neuro QOL" and shows the "Project Setup" tab selected. The project status is "Development" and "Completed steps 0 of 7". The main content area is organized into several sections, each with a "Not started" status and an "I'm done!" button:

- Main project settings:** Includes options to "Use surveys in this project?", "Use longitudinal data collection with defined events?", and "Use the MyCap participant-facing mobile app?". A link for "VIDEO: How to create and manage a survey" is provided.
- Design your data collection instruments & enable your surveys:** Provides instructions on adding or editing fields and links to "Online Designer" and "Data Dictionary".
- Enable optional modules and customizations:** Lists various modules like "Repeating instruments", "Auto-numbering for records", "Scheduling module", "Randomization module", and "Designate an email field for communications".
- Set up project bookmarks (optional):** Explains how to create custom bookmarks to webpages.
- User Rights and Permissions:** Explains how to grant access to other users.

SETTING UP YOUR PROJECT:

WHERE DO I BEGIN?

# How do I create a new project in REDCap?



REDCap FAQ  
Project Design

Click the '+New Project' tab, complete the form  
- Remember to enter the PI and study information

Home My Projects **+ New Project** Help & FAQ Training Videos Messenger Control Center

### + 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?*

**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)

- After we verify you have a study account, we will create the project and notify you via email within 1-2 business days.

# Big Picture Questions

What type of project is needed?

- Classic Database

- Each form can only be completed at one time point
- One record per subject.

- Longitudinal

- Data collected multiple times per subject
- Fixed number of collection points that correspond to pre-defined events (e.g. baseline, 3mo. follow-up, 6mo. follow-up, 1yr follow-up)
- Optional scheduling via a project calendar
- Can have multiple study arms

# Big Picture Questions

How will you collect the data?

- Data Entry
  - Data entered by REDCap users (i.e. research staff)
  - Offline data collection available via mobile app
- Survey
  - Online survey completed by participants
  - Participants do not need to have a Yale NetID

A project can have both surveys and data entry forms.

# How to Set Up your Project

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

Project status: Development Completed steps **0** of **7**

**Not started**

**Main project settings**

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

Enable  Use longitudinal data collection with defined events? [?](#)

Enable  Use the MyCap participant-facing mobile app? [Learn more about MyCap](#)

[I'm done!](#)

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

**Not started**

**Design your data collection instruments**

Add or edit fields on your data collection instruments. This may be done by either using the Online Designer (online method) or by uploading a Data Dictionary (offline method). Quick links: [Download PDF of all instruments](#) OR [Download the current Data Dictionary](#)

[I'm done!](#)

Go to [Online Designer](#) or [Data Dictionary](#) Explore the [REDCap Instrument Library](#)

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

Learn how to use [Smart Variables](#) [Piping](#) [Action Tags](#) [Field Embedding](#) [Special Functions](#)

**Optional**

**Enable optional modules and customizations**

Modify  [Repeating instruments](#) [?](#)

Disable  [Auto-numbering for records](#) [?](#)

Enable  [Scheduling module \(longitudinal only\)](#) [?](#)

Enable  [Randomization module](#) [?](#)

Enable  [Designate an email field for communications \(including survey invitations and alerts\)](#) [?](#)

[Additional customizations](#)

Settings displayed to Administrators only:

Enable  [Twilio SMS and Voice Call services for surveys and alerts](#) [?](#)

Enable  [Mosio SMS services for surveys and alerts](#) [?](#)

Enable  [SendGrid Template email services for Alerts & Notifications](#) [?](#)

[I'm done!](#)

# Project Setup: Enable Settings

If applicable:

- Enable survey setting
- Enable longitudinal setting

Project Home | Project Setup | Other Functionality | Project Revision History | [Edit project sett](#)

Project status: Development Completed steps 0 of 7

### Main project settings

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

⊖ Use longitudinal data collection with defined events? [?](#)

# Project Setup: Build your Instruments

## Design your project instruments

Method 1: Online Designer

Method 2: Data Dictionary



Not  
started

I'm done!

### Design your data collection instruments

Add or edit fields on your data collection instruments. This may be done by either using the Online Designer (online method) or by uploading a Data Dictionary (offline method). Quick links: [Download PDF of all instruments](#) OR [Download the current Data Dictionary](#)

Go to [Online Designer](#) or [Data Dictionary](#) Explore the [REDCap Shared Library](#)

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

Learn how to use [Smart Variables](#) [Piping](#) [@ Action Tags](#) [Field Embedding](#)



# Project Set Up: Building with the Online Designer

## Online Designer

- Allows you to create/modify/delete data collection instruments and fields (questions) in your web browser.
- Changes are made in real time and available immediately for review and testing.

[Project Home](#) [Project Setup](#) [Online Designer](#) [Data Dictionary](#) [Codebook](#)

[VIDEO: How to use this page](#)

[Create snapshot of instruments](#)

Last snapshot: never [?](#)

The Online Designer will allow you to make project modifications to fields and data collection instruments very easily using only your web browser.

NOTE: While in development status, all field changes will take effect immediately in real time.

### Data Collection Instruments

- [+ Create](#) a new instrument from scratch
- [Import](#) a new instrument from the official [REDCap Instrument Library](#)
- [Upload](#) instrument ZIP file from another project/user or [external libraries](#)

### Form options:

[Form Display Logic](#)

### Survey options:

[Survey Queue](#)

[Auto Invitation options](#)

[Survey Login](#)

[Survey Notifications](#)

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey related options
Form 1	1	<a href="#">PDF</a>	<a href="#">Enable</a>	<a href="#">Choose action</a>	

# Project Set Up: Building with the Online Designer

[Project Home](#) [Project Setup](#) [Online Designer](#) [Data Dictionary](#) [Codebook](#)

[VIDEO: How to use this page](#) [Create snapshot of instruments](#) Last snapshot: never [?](#)

This page allows you to build and customize your data collection instruments one field at a time. You may add new fields or edit existing ones. New fields may be added by clicking the **Add Field** buttons. You can begin editing an existing field by clicking on the **Edit** icon. If you decide that you do not want to keep a field, you can simply delete it by clicking on the **Delete** icon. To reorder the fields, simply **drag and drop** a field to a different position within the form below. NOTE: While in development status, all field changes will take effect immediately in real time.

[Return to list of instruments](#) [Next instrument](#)

Current instrument: **Form 1** [Preview instrument](#)

**Record ID**

NOTE: The field above is the record ID field and thus cannot be deleted or moved. It can only be edited.

[Add Field](#) [Add Matrix of Fields](#) [Import from Field Bank](#)

This field's value can be auto-assigned by REDCap  
(Project Setup → Enable optional modules → Enable auto-numbering for records)

# Project Set Up: Building with the Online Designer

1. Edit field

2. Copy field

3. Specify branching logic

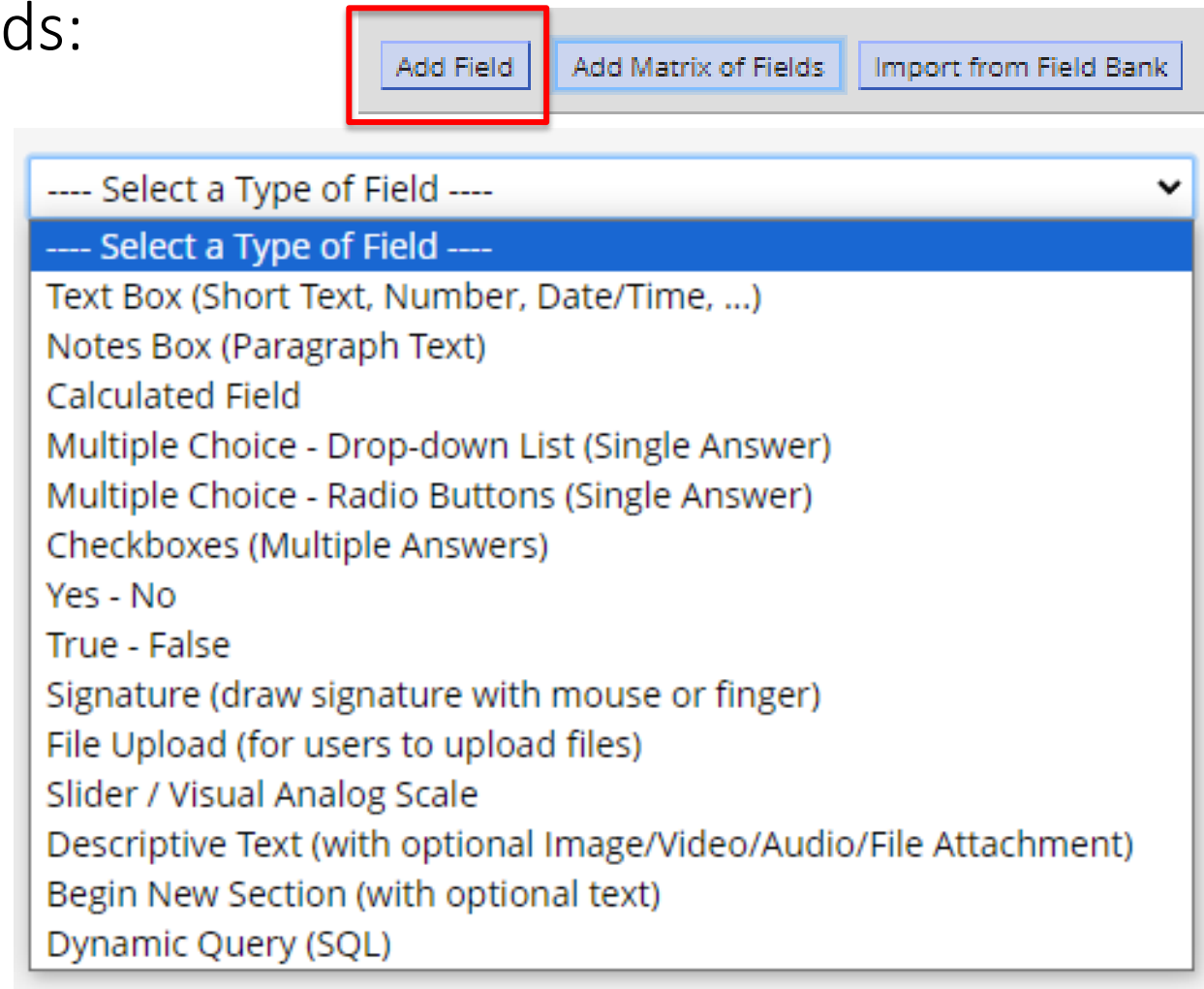
4. Move field (can move to other form)

The screenshot displays a configuration panel for a field named "Date of screening". At the top right of the panel are two buttons: "Add Field" and "Add Matrix of Fields". Below these buttons is a toolbar containing five icons: a pencil (edit), a document with a plus sign (copy), a green arrow (move), a document with a plus sign (add), and a red X (delete). The text "Variable: screendate" is positioned to the right of the toolbar. The main field configuration area includes the label "Date of screening" in bold, a red asterisk followed by the text "\* must provide value", an empty text input box, a calendar icon, a "Today" button, and the format "M-D-Y". At the bottom right of the panel are two more buttons: "Add Field" and "Add Matrix of Fields".

5. Delete field

# Building Forms: Field Types

Standard fields:

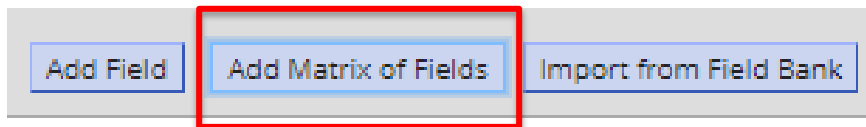


The screenshot shows the 'Add Field' button highlighted with a red box. Below it is a dropdown menu with the following options:

- Select a Type of Field ----
- Select a Type of Field ----
- Text Box (Short Text, Number, Date/Time, ...)
- Notes Box (Paragraph Text)
- Calculated Field
- Multiple Choice - Drop-down List (Single Answer)
- Multiple Choice - Radio Buttons (Single Answer)
- Checkboxes (Multiple Answers)
- Yes - No
- True - False
- Signature (draw signature with mouse or finger)
- File Upload (for users to upload files)
- Slider / Visual Analog Scale
- Descriptive Text (with optional Image/Video/Audio/File Attachment)
- Begin New Section (with optional text)
- Dynamic Query (SQL)

# Building Forms: Field Types

Matrix fields:



Please let us know your weekly schedule for the following:

	Monday	Tuesday	Wednesday	Thursday	Friday
6) Gym (Weight Training)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7) Aerobics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8) Eat Out (Dinner/Lunch)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9) Drink (Alcoholic Beverages)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# Building Forms: Field Name

- Each field name must be:
  - Unique
  - Lowercase
  - Contain fewer than 26 characters
  - Contain only letters, numbers, and underscores
- In general, field names should be as short in length as possible and maintain meaning.

Instead of 'demographics\_q1' or 'what\_was\_your\_sex\_at\_birth',  
use 'birth\_sex'!

# Building Forms: Drop Down Field

## 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:** Multiple Choice - Drop-down List (Single Ansv) ▼

**Field Label**

Race

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

1, White  
2, Black or African-American  
3, Asian  
4, American Indian or Alaskan Native

**Enable auto-complete for this drop-down** ?

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

**Action Tags / Field Annotation** (optional)

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

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

race  **Enable auto naming of variable based upon its Field Label?**

ONLY letters, numbers, and underscores

How to use [Smart Variables](#) [Piping](#)

**Required?\***  No  Yes  
\* Prompt if field is blank

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

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

**Field Note** (optional)   
Small reminder text displayed underneath field

# Building Forms: Using Field Validation

Validation is an important tool that can be used to prevent errors. It also helps when exporting data to statistical packages.

### Edit Field

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

**Field Type:** Text Box (Short Text, Number, Date/Time, ...) ▾

**Field Label**  
Date of screening

**Variable Name** (utilized in logic, calcs, and exports)  
screendate  Enable auto naming of variable based upon its Field Label?  
ONLY letters, numbers, and underscores

How to use [Smart Variables](#) [Piping](#)

**Validation?** (optional) Date (M-D-Y) ▾  
---- None ----  
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  
Number  
Number (1 decimal place)  
Number (2 decimal places)  
Phone (North America)  
Social Security Number (U.S.)  
Time (HH:MM)  
Time (MM:SS)

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

**Enable searching with**  
-- choose ontology to

**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

**Field Note** (optional)  
Small reminder text displayed



# Building Forms: Tagging Identifiers

Fields that constitute protected health information (PHI) can be marked as an “Identifier”

These fields can then be excluded on data export, allowing for analysis of “de-identified” data

Users can also be restricted in their ability to export Identifier fields based on access rights

The screenshot displays the configuration interface for a form field in REDCap. The field name is 'dob'. The validation is set to 'Date (D-M-Y)'. The 'Required?' field is set to 'No'. The 'Identifier?' field is set to 'No' and is highlighted with a red box. The 'Identifier?' field is labeled 'Identifier?' and has a radio button for 'No' (selected) and a radio button for 'Yes'. Below the radio buttons is the text 'Does the field contain identifying information (e.g., name, SSN, address)?'. The 'Required?' field is labeled 'Required?\*' and has a radio button for 'No' (selected) and a radio button for 'Yes'. Below the radio buttons is the text '\* Prompt if field is blank'. The 'Validation?' field is labeled 'Validation? (optional)' and has a dropdown menu set to 'Date (D-M-Y)'. Below the dropdown menu are input fields for 'Minimum:' and 'Maximum:'. Below these fields is a tip: 'Tip for min/max limits: You may pipe a value from another field to set dynamic range limits - e.g., [visit\_date] or [event\_1\_arm\_1][age]. You may also use the word today or now (not wrapped in quotes) for date/time fields.' Below the tip is the text '- OR -' and a dropdown menu set to '-- select ontology service --'. The 'Variable Name' field is labeled 'Variable Name (utilized in logic, calcs, and exports)' and has a text input field containing 'dob'. To the right of the text input field is a checkbox labeled 'Enable auto naming of variable based upon its Field Label?'. Below the text input field is the text 'ONLY letters, numbers, and underscores'. Below the text input field are three buttons: 'Smart Variables', 'Piping', and 'Field Embedding'. Below the buttons is the text 'How to use'.

QUESTIONS?

# Building Forms: Action Tags



REDCap FAQ  
Features-Basic

Action tags allow you to modify fields in very specific ways. Once applied, a corresponding action is performed.

In REDCap, action tags begin with the '@' sign and are placed inside a field's "Action Tags/Field Annotation" box.

**Field Label**

Test default value

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

1, Yes  
2, No

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

**Action Tags / Field Annotation (optional)**

@DEFAULT='2'

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

+ Adding new Participant ID code 1111

Event Name: **Flu Clinic (Arm 1: U19)**

Participant ID code	1111
test secondary unique field	<input type="text"/> (Secondary unique NOTE: Modifying th corresponding inst Repeating Instance
Test default value	<input type="radio"/> Yes <input checked="" type="radio"/> No

# Building Forms: Smart Variables

Allow reference information other than data fields (e.g., event, repeat instance, DAG or users)

Example: Set the default value of a field to be the value of the previous event.

Field Label	Event Name: <b>Event 1</b>
test1	Record ID 1 <small>To rename Record Ho</small>
	test1 <input type="text" value="1"/>
	Editing existing Record ID 1
Action Tags / Field Annotation (optional)	Event Name: <b>Event 2</b>
@DEFAULT='[previous-event-name][test1]'	Record ID 1 <small>To rename the record, see the Record Home Page.</small>
	test1 <input type="text" value="1"/>

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

# Building Forms: Smart Variables

Name of Smart Variable	Description	Example of Usage	
		Example input	Example output
<b>User</b>			
[user-name]	The current user's REDCap username.	[user-name]	jane_doe
[user-fullname]	The current user's first and last name (as listed on their My Profile page).	[user-fullname]	Jane Doe
[user-email]	The current user's primary email address (as listed on their My Profile page).	[user-email]	jane.doe@example.edu
[user-dag-name]	The Data Access Group (the unique group name) to which the current user belongs (blank if not in a DAG).	[user-dag-name]	vanderbilt_group
[user-dag-id]	The group ID number of the Data Access Group to which the current user belongs (blank if not in a DAG).	[user-dag-id]	324
[user-dag-label]	The name/label of the Data Access Group to which the current user belongs (blank if not in a DAG).	[user-dag-label]	Vanderbilt Group
<b>Record</b>			
[record-name]	The record name of the current record.	[record-name]	108
[record-dag-name]	The Data Access Group (the unique group name) to which the current record belongs (blank if not in a DAG).	[record-dag-name]	harvard_site
[record-dag-id]	The group ID number of the Data Access Group to which the current record belongs (blank if not in a DAG).	[record-dag-id]	96
[record-dag-label]	The name/label of the Data Access Group to which the current record belongs (blank if not in a DAG).	[record-dag-label]	Harvard Site
<b>Form</b>			
[is-form]	Detects if the current instrument is being viewed as a data entry form (returns 1 for True, 0 for False), as opposed to a survey.	[is-form]	1

[+] Smart Variables

Close

# Building Forms: Smart Variables Examples

- Survey duration  
[survey-duration-completed:demographics]
- Auto-capture user's name  
@DEFAULT='[user-name]'
- Branching logic based on event name  
[event-name]='baseline\_arm\_1'

# Building Forms: Branching Logic

Choose method below for the following field: **longcovid\_yn** - Long COVID?

**Advanced Branching Logic Syntax**    How to use [Branching Logic](#) [Smart Variables](#) [Special Functions](#)

Show the field ONLY if...

`[covid_yn] = '1'`

Test logic with a record: -- select record -- ▾

[Clear logic](#)

— OR —

**Drag-N-Drop Logic Builder**

Displaying field choices for the following data collection instrument:  
Form 1 ▾

**Field choices from other fields**  
(drag a choice below to box on right)

- sex = Female (1)
- sex = Male (2)
- age = (define criteria)
- pregnant = Yes (1)
- pregnant = No (0)
- covid\_yn = Yes (1)
- covid\_yn = No (0)
- sts = (define criteria)
- weight = (define criteria)

Drag and Drop

Show the field ONLY if...

ALL below are true  
 ANY below are true

covid\_yn = Yes (1) ✖

[Clear logic](#)

Save    Cancel

You can use fields on the current data entry form OR other forms

If fields from different events are used in branching logic, the field name needs to be preceded by an event name, e.g.  
`[screening_arm_1][field1]`

# Building Forms: Piping

## Without Piping:

What kind of ice cream do you like?	<input type="radio"/> Chocolate <input type="radio"/> Strawberry <input type="radio"/> Vanilla	reset
How often do you eat _____ ice cream?	<input type="radio"/> Once a week <input type="radio"/> Twice a week <input type="radio"/> Three times a week	reset

## With Piping:

What kind of ice cream do you like?	<input checked="" type="radio"/> Chocolate <input type="radio"/> Strawberry <input type="radio"/> Vanilla	reset
How often do you eat <b>Chocolate</b> ice cream?	<input type="radio"/> Once a week <input type="radio"/> Twice a week <input type="radio"/> Three times a week	reset



# Building Forms: Piping



REDCap FAQ  
Features-Basic

## How to use piping:

The screenshot shows the REDCap form editor interface. On the left, there are two form questions:

- Question 1: "What kind of ice cream do you like?" with radio button options: Chocolate, Strawberry, and Vanilla. The variable name is "ice\_cream".
- Question 2: "How often do you eat [ice\_cream] ice cream?" with radio button options: Once a week, Twice a week, and Three times a week. The variable name is "icecream\_ofTEN".



The "Edit Field" dialog box is open for the second question. It shows the following configuration:

- Field Type:** Multiple Choice - Radio Buttons (Single Answer)
- Question Number (optional):** [Empty field]
- Field Label:** How often do you eat [ice\_cream] ice cream? (The "[ice\_cream]" is highlighted in yellow, and a red arrow points to it from the main form editor.)
- Choices (one choice per line):**
  - Once a week
  - Twice a week
  - Three times a week
- Variable Name (utilized during data export):** icecream\_ofTEN
- Required?\***  No  Yes
- Identifier?**  No  Yes
- Custom Alignment:** Right / Vertical (RV)
- Field Note (optional):** [Empty field]



Buttons for "Save" and "Cancel" are visible at the bottom right of the dialog box.

# Building Forms: Field Embedding

Without field embedding:


<b>Test Date 1</b>	<input type="text"/>  Today M-D-Y	<b>↓ Field Embedding</b>
<b>Test Result 1A</b>	<input type="text"/>	
<b>Test Result 1B</b>	<input type="text"/>	
<b>Test Date 2</b>	<input type="text"/>  Today M-D-Y	
<b>Test Result 2A</b>	<input type="text"/>	
<b>Test Result 2B</b>	<input type="text"/>	

With field embedding:


Date	Test Result A	Test Result B
<input type="text"/>  Today M-D-Y	<input type="text"/>	<input type="text"/>
<input type="text"/>  Today M-D-Y	<input type="text"/>	<input type="text"/>

QUESTIONS?


# How to Set Up your Project

 **Complete!**  
Not complete?

### Main project settings

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

Use longitudinal data collection with defined events? [?](#)

 **Complete!**  
Not complete?


### Design your data collection instruments & enable your surveys

Add or edit fields on your data collection instruments (survey and forms). This may be done by either using the Online Designer (online method) or by uploading a Data Dictionary (offline method). You may then enable your instruments to be used as surveys in the Online Designer. Quick links: [Download PDF of all instruments](#) OR [Download the current Data Dictionary](#)

Go to  or  Explore the

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


Learn how to use

 **Complete!**  
Not complete?

### Define your events and designate instruments for them

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

Go to  or

 **Optional**

### Enable optional modules and customizations

Repeatable instruments and events [?](#)

Auto-numbering for records [?](#)

Scheduling module (longitudinal only) [?](#)

Randomization module [?](#)

Designate an email field for sending survey invitations [?](#)  
Field currently designated: **testemail** ("Test email")

# How to Define Events

**WARNING:**

Deleting any events below will result in data loss. Please proceed with caution.

Upload or download arms/events

Arm 1: U19    Arm 2: IMAGIN    +Add New Arm

Arm name: U19


[Rename Arm 1](#) | [Delete Arm 1](#)

	Event #	Days Offset	Offset Range Min / Max	Event Name	Custom Event Label (optional)	Unique event name (auto-generated)
	1	0	-0/+0	Flu Clinic		flu_clinic_arm_1
	2	2	-0/+2	Day 2-4 Blood Draw		day_24_blood_draw_arm_1
	3	7	-0/+0	Day 7 Blood Draw		day_7_blood_draw_arm_1
	4	28	-0/+0	Day 28 Blood Draw		day_28_blood_draw_arm_1
	5	70	-0/+0	Day 70 Blood Draw		day_70_blood_draw_arm_1
	6	100	-0/+0	Non-Flu Blood Draw		nonflu_blood_draw_arm_1
Add new event		<input type="text"/> Days	<input type="text"/> - <input type="text"/> + <input type="text"/>	<input type="text"/>	<input type="text"/>	
		<a href="#">Convert from other units</a>		Descriptive name for this event	Custom Event Label (optional) Example: [visit_date], [weight] kg	

Unique event name is auto-generated.

This is where you will find the event names for use in branching logic.

# How to Designate Instruments to Events

 Upload or download instrument mappings ▾

Arm 1: U19

Arm 2: IMAGIN

Arm name: U19

Begin Editing

Save

Select All | Deselect All

Data Collection Instrument	Flu Clinic (1)	Day 2-4 Blood Draw (2)	Day 7 Blood Draw (3)	Day 28 Blood Draw (4)	Day 70 Blood Draw (5)	Non-Flu Blood Draw (6)
Screening & Enrollment Form	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Phone Interview	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Blood Draw Form	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Frailty Assessment	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Study Withdrawal	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Genetic Data Repository Consent	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Additional Blood Draw Form (Non-Flu)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

The event list and instrument mappings can be downloaded from one project and uploaded to another project.

# SURVEYS

# Surveys

Not enabled as a survey:

My Projects or Control Center  
REDCap Messenger  
Contact REDCap administrator  
View project as user: -- select a user --  
Enter PID to go to project

**Project Home and Design**

Project Home · Project Setup  
Designer · Dictionary · Codebook  
Project status: **Development**

**Data Collection**

Survey Distribution Tools  
- Get a public survey link or build a participant list for inviting respondents

Record Status Dashboard  
- View data collection status of all records

Add / Edit Records  
- Create new records or edit/view existing ones

---

**Record ID 3** [Select other record](#)

Data Collection Instruments:

- Form 1
- Consent
- Neuro-QOL SF v1.0 - Fatigue**
- Tracking Form

## Neuro-QOL SF v1.0 - Fatigue

Invitation status:

Survey options

Editing existing Record ID 3.

Record ID	3
<b>In the past 7 days I felt tired</b>	<input type="radio"/> none of the time <input type="radio"/> a little bit of time <input type="radio"/> some of the time <input type="radio"/> most of the time <input type="radio"/> all of the time <a href="#">reset</a>
<b>In the past 7 days I had trouble starting things because I was too tired</b>	<input type="radio"/> none of the time <input type="radio"/> a little bit of time <input type="radio"/> some of the time <input type="radio"/> most of the time <input type="radio"/> all of the time <a href="#">reset</a>
<b>In the past 7 days I had trouble finishing things because I was too tired</b>	<input type="radio"/> none of the time <input type="radio"/> a little bit of time <input type="radio"/> some of the time <input type="radio"/> most of the time <input type="radio"/> all of the time <a href="#">reset</a>



# Enabled as a survey

## Neuro-QOL SF v1.0 - Fatigue

AAA

 [English](#)  

Please complete the survey below.

Thank you!

**In the past 7 days  
I felt tired**

- none of the time
- a little bit of time
- some of the time
- most of the time
- all of the time

[reset](#)

**In the past 7 days  
I had trouble starting things because I was too tired**

- none of the time
- a little bit of time
- some of the time
- most of the time
- all of the time

[reset](#)

**In the past 7 days  
I had trouble finishing things because I was too tired**






- none of the time
- a little bit of time
- some of the time
- most of the time
- all of the time

[reset](#)

# How to Set Up a Survey

Enable any form as a survey in Online Designer

- Open survey setting; configure the survey

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey related options
Participant Information	17		<a href="#">Enable</a>	<a href="#">Choose action</a> ▾	
Prior Study Data	41		<a href="#">Enable</a>	<a href="#">Choose action</a> ▾	
Communication Log	17		<a href="#">Enable</a>	<a href="#">Choose action</a> ▾	
Consent Form	0			<a href="#">Choose action</a> ▾	<a href="#">Survey settings</a> <a href="#">+ Automated Invitations</a>

Survey features:

- Schedule automated survey invitations
- Set up a survey queue
- Create unique login code for survey respondents
- Set up researcher notifications upon survey completion

# How to Send Surveys to Participants




REDCap FAQ  
Surveys


- Anonymous: Use the public survey link. Survey must be the first form; record will be created as each survey is completed.
- Non-anonymous: Designate an email field for sending survey (recommended method).

REDCap has many advanced features that can be used for setting up surveys. This will be covered in the survey development training.


# How to Set Up your Project

 **Complete!**  
Not complete?

### Main project settings

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

Use longitudinal data collection with defined events? [?](#)

 **Complete!**  
Not complete?


### Design your data collection instruments & enable your surveys

Add or edit fields on your data collection instruments (survey and forms). This may be done by either using the Online Designer (online method) or by uploading a Data Dictionary (offline method). You may then enable your instruments to be used as surveys in the Online Designer. Quick links: [Download PDF of all instruments](#) OR [Download the current Data Dictionary](#)

Go to  or  Explore the

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


Learn how to use

 **Complete!**  
Not complete?

### Define your events and designate instruments for them

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

Go to  or

 **Optional**

### Enable optional modules and customizations

Repeatable instruments and events [?](#)

Auto-numbering for records [?](#)

Scheduling module (longitudinal only) [?](#)

Randomization module [?](#)

Designate an email field for sending survey invitations [?](#)  
Field currently designated: **testemail** ("Test email")

QUESTIONS?

FINAL STEPS BEFORE IMPLEMENTATION:

USER RIGHTS AND TESTING

# Granting User Rights in REDCap: Individual Users



User access can be set up by “Custom Right” or “Role Based” access

- Best Practice: “Role Based” access

The screenshot shows the REDCap interface for managing user rights. On the left is a navigation sidebar with sections: My Projects (Project Home, Project Setup), Data Collection (Manage Survey Participants, Record Status Dashboard, Add/Edit Records), and Applications (Calendar, Data Exports, Reports, and Stats, Data Import Tool, Data Comparison Tool, Logging, Field Comment Log, File Repository, User Rights and DAGs, Record Locking Customization, E-signature and Locking Mgmt, Data Quality). The 'User Rights' tab is selected in the top navigation. The main content area has a heading: 'This page may be used for granting users access to this project and for managing the user privileges of those users. You may also create roles to which you may assign users (optional). User roles are useful when you will have several users with the same privileges because they allow you to easily add many users to a role in a much faster manner than setting their user privileges individually. Roles are also a nice way to categorize users within a project. In the box below you may add/assign users or create new roles, and the table at the bottom allows you to make modifications to any existing user or role in the project, as well as view a glimpse of their user privileges.' Below the text are two sections: 'Add new users: Give them custom user rights or assign them to a role.' with buttons for 'Add new user' and 'Add with custom rights', and 'Assign new user' and 'Assign to role'. The second section is 'Create new roles: Add new user roles to which users may be assigned.' with a button for 'Enter new role name' and 'Create role' (with an example: 'e.g., Project Manager, Data Entry Person').

# Granting User Rights in REDCap: Individual Users and User Roles

Basic Rights:  
Access to the Project

Viewing and Exporting Data:  
Access to Individual Forms

## Basic Privileges

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

### Highest level privileges:

- ☰ Project Design and Setup
- 👤 User Rights
- 👥 Data Access Groups

### Other privileges:

- 🗨️ Survey Distribution Tools
- 🔔 Alerts & Notifications
- 📅 Calendar
- 🔍 Add/Edit/Organize Reports   
Also allows user to view ALL reports (but not necessarily all data in the reports)
- 📊 Stats & Charts
- 📂 Data Import Tool
- ⚖️ Data Comparison Tool
- 📄 Logging
- 📁 File Repository
- 📄 Data Quality  Create & edit rules  
What is Data Quality?  Execute rules

## Privileges for Viewing and Exporting Data

Data Viewing Rights pertain to a user's ability to view or edit data on pages in the project (e.g., data entry forms, reports). Users with 'No Access' Data Viewing Rights for a given instrument will not be able to view that instrument for any record, nor will they be able to view fields from that instrument on a report. Data Export Rights pertain to a user's ability to export data from the project, whether through the Data Exports page, API, Mobile App, or in PDFs of instruments containing record data. Note: Data Viewing Rights and Data Export Rights are completely separate and do not impact one another.

	Data Viewing Rights				Data Export Rights			
	No Access (Hidden)	Read Only	View & Edit	Edit survey responses	No Access	De-Identified*	Remove All Identifier Fields	Full Data Set
Participant Information (survey)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Consent (survey)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Neuro-QOL SF v1.0 - Fatigue (survey)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Tracking Form	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

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

### 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.

- Announcement Banner\*
- Simple Ontology Module\*

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

Save Changes

Cancel

Remove user



# Granting User Rights in REDCap: Data Access Groups (DAGs)



REDCap FAQ  
Data Security  
& Protection

“Data Access Group” is an advanced feature that is useful for multi-center trials and collaborations, especially for HIPAA compliance.

- Users in a particular Data Access Group can only see records entered by other users in that Data Access Group

**Create new groups:** Add new data access groups to which users may be assigned.



**Assign user to a group:** Users may be assigned to any data access group.



Assign user



to



Data Access Groups	Users in group	Number of records in group	Unique group name (auto-generated)	Group ID number	Delete group?
test		5	test	42	
test2		1	test2	1823	
[Not assigned to a group]	 * Can view ALL records	134			

# Granting User Rights in REDCap: Assigning Users to multiple DAGs

Users can be assigned to more than one DAG using the DAG Switcher setting.

**⚙️ DAG Switcher: Enable multiple Data Access Groups for users** **Display options:**  Rows are DAGs  Rows are Users

Users assigned to Data Access Groups (DAGs) can optionally be assigned to multiple \*potential\* DAGs, in which they may be given the privilege of switching in and out of specific DAGs on their own whenever they wish. To assign a user to multiple DAGs, check the checkboxes below for that user. At least two DAGs must be checked for a user in order for them to use the DAG Switcher. NOTE: This does not override a user's current DAG assignment, as set above or on the User Rights page.

Show  entries

Data Access Groups	Users	
	<input type="checkbox"/>	<input type="checkbox"/>
[No Assignment]	<input type="checkbox"/>	<input type="checkbox"/>
test1	<input type="checkbox"/>	<input checked="" type="checkbox"/>
test2	<input type="checkbox"/>	<input checked="" type="checkbox"/>

# TEST YOUR PROJECT!



Not started

I'm done!

## Test your project thoroughly

It is important to test the essential components of your project before moving it into production. Try creating a few test records and entering some data for each to ensure that your data collection instruments look and behave how you expect, especially branching logic and calculations. Then review your test data by creating reports and exporting your data to view in Excel or a statistical analysis package. If you have surveys, complete the surveys as if you were a participant by using the Public Survey Link or Participant List by sending a survey invitation to yourself. If other project modules will be used regularly, test them out a bit too. The best way to test your project is to use it as if you were entering real production data, and it is always helpful to have colleagues (especially team members) take a look at your project to get a fresh set of eyes looking at it.

- Make sure you test your project thoroughly by entering test data.
- Have other users enter data or complete surveys.
- Export the test data to make sure the format can be used for data analysis.

# Moving your Project to Production



Not started

## 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.

Go to

### 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.
- 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.

QUESTIONS?

# Using Data Exports, Reports and Stats

# Exporting Data



REDCap FAQ  
Data Security  
& Protection

You can export the entire dataset or select forms/fields

## 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  (auto-generated)
A	<b>All data</b> (all records and fields)	View Report  Export Data  Stats & Charts		
B	<b>Selected instruments and/or events</b> (all records)	Make custom selections		
1	test (copy)	View Report  Export Data  Stats & Charts	Edit  Copy  Delete	1322
2	frailty assessment	View Report  Export Data  Stats & Charts	Edit  Copy  Delete	2

# Setting Up 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](#)

You may create a new report by selecting the fields/variables below that you want to include in the report. You may add as many fields to your report as you wish, and you can choose which users may view this report. You will also need to provide a name for your report, which will then be displayed on the project's left-hand menu for anyone to whom you have given access. You can filter the results returned in the report in a variety of ways, including using complex AND/OR logic. When you are finished, click the Save Report button at the bottom. The new report will then be added to your list of reports, after which you may immediately begin viewing them or exporting them.

**Name of Report:**

**Set as "public":** Enabling this feature below will auto-generate a public link for viewing the report without needing to log in to REDCap.  
 **Report is publicly viewable by anyone with the public link**

**Description (optional):**  
Displayed on page below report name

Paragraph

**Rich Text Editor:** Paragraph, Bold (B), Italic (I), Underline (U), Link, Unlink, Bulleted List, Numbered List, Indent, Outdent, Undo, Redo, Text Color, Background Color, Text Color, Background Color, Bold, Italic, Underline, Link, Unlink, Bulleted List, Numbered List, Indent, Outdent, Undo, Redo, Text Color, Background Color, Text Color, Background Color.

### 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

**Fields to include in report** [+ Quick Add](#)

Add all fields from selected instrument:

Field	Field Label	Instrument
Field 1	record_id "Record ID"	Participant Information
Field 2	Type variable name or field label	Instrument:

**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)
- Include the repeating instance fields (`redcap_repeat_instrument`, `redcap_repeat_instance`) in the report and data export?
- Remove line breaks/carriage returns from all text data values (only applicable for CSV Raw and CSV Label data exports)

In the report header, display the field label, variable, or both (not applicable for exports)?

In the report's data, display the field label, raw data value, or both for multiple choice fields (not applicable for exports)?

## Steps:

- Set user access
- Add fields
- Filter data
- Order results

Any report can be used to export data










# Exporting Data

## Exporting "All data (all records and fields)"

Select your export settings, which includes the export format (Excel/CSV, SAS, SPSS, R, Stata) and if you wish to perform de-identification on the data set.

### Choose export format

-  CSV / Microsoft Excel (raw data)
-  CSV / Microsoft Excel (labels)
-  SPSS Statistical Software
-  SAS Statistical Software
-  R Statistical Software
-  Stata Statistical Software
-  CDISC ODM (XML)

### De-identification options (optional)

The options below allow you to limit the amount of sensitive information that you are exporting out of the project. Check all that apply.

#### Known Identifiers:

- Remove all tagged Identifier fields (tagged in Data Dictionary)
- Hash the Record ID field (converts record name to an unrecognizable value)

#### Free-form text:

- Remove unvalidated Text fields (i.e. Text fields other than dates, numbers, etc.)
- Remove Notes/Essay box fields

#### Date and datetime fields:

- Remove all date and datetime fields
- OR —
- Shift all dates by value between 0 and 364 days  
(shifted amount determined by algorithm for each record) [What is date shifting?](#)
- Also shift all survey completion timestamps by value between 0 and 364 days  
(shifted amount determined by algorithm for each record)

[Deselect all options](#)

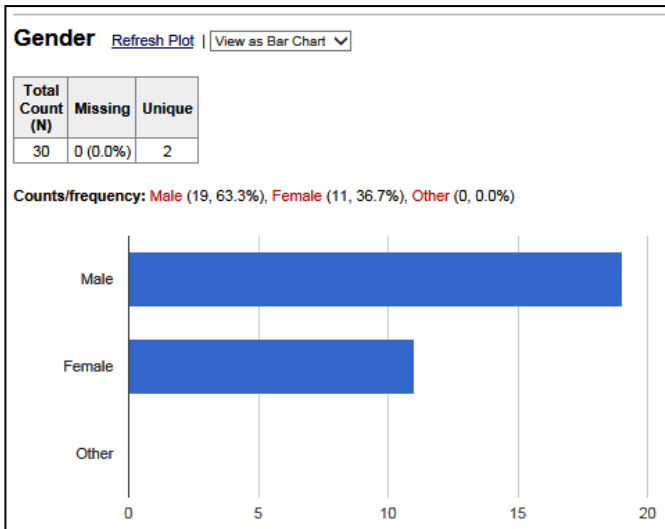
### Additional export options

- Export Data Access Group name for each record (if record is in a group)?
- Export survey identifier field and survey timestamp field(s)?

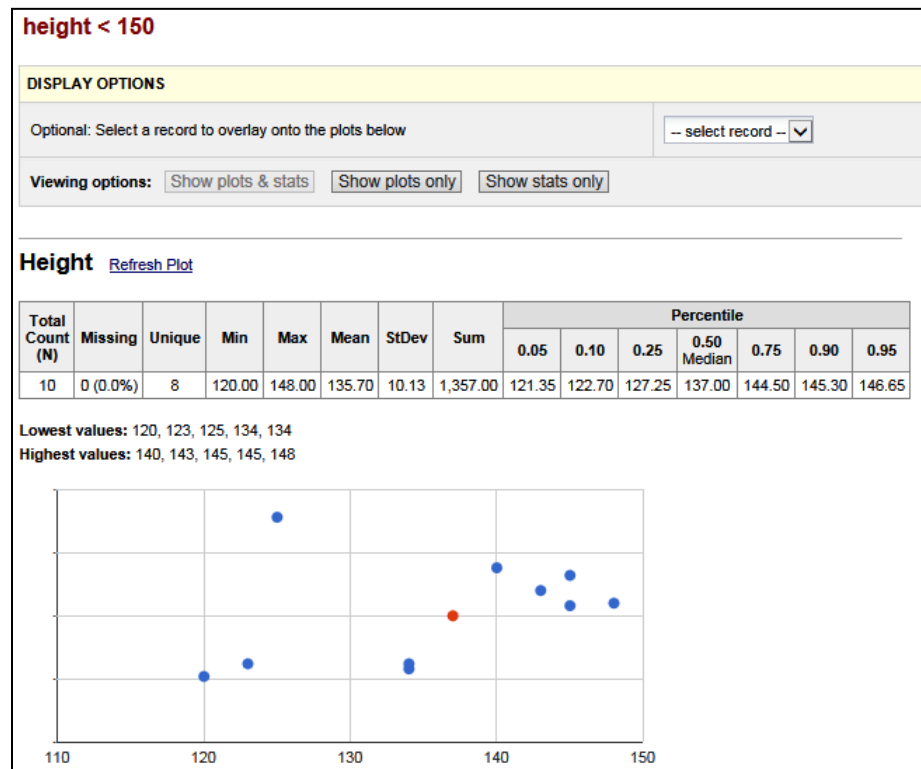
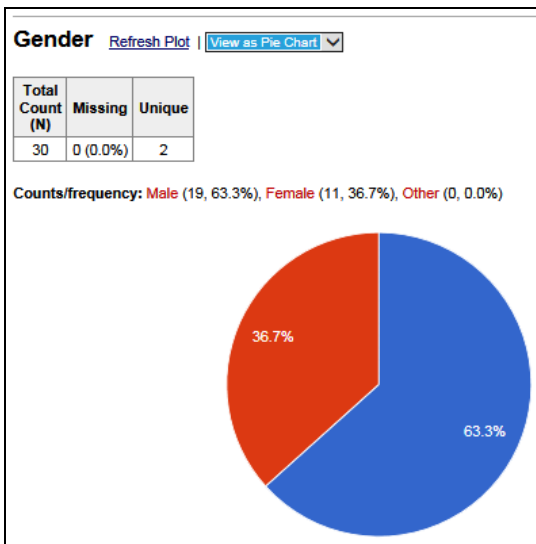
Export Data

Cancel

# Stats and Charts



Report name	View/Export Options
A All data (all records and fields)	<a href="#">View Report</a> <a href="#">Export Data</a> <span style="border: 2px solid red; padding: 2px;"><a href="#">Stats &amp; Charts</a></span>



# Data Dictionary Codebook

The Codebook is a 'human' readable, read-only version of the project data dictionary.

**Project Home and Design**

- Project Home
- Project Setup
- Designer
- Dictionary
- Codebook**

Project status: **Development**

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**Data Collection**

- Survey Distribution Tools**  
- Get a public survey link or build a participant list for inviting respondents
- Record Status Dashboard**  
- View data collection status of all records
- Add / Edit Records**  
- Create new records or edit/view existing ones

Print page

**Data Dictionary Codebook**

#	Variable / Field Name	Field Label <i>Field Note</i>	Field Attributes (Field Type, Validation, Choices, Calculations, etc.)
Instrument: <b>Demographics</b> (demographics)			
1	subjid	Subject ID	text (integer, Min: 8000, Max: 8999), Required
2	demo_date	Date Completed Demographics Form	text (date_mdy), Required
3	demo_init	Staff Initial	text, Required
4	age	Section Header: <i>Demographics Form</i> Age	text (integer, Min: 40), Required
5	sex	Gender	radio, Required 1 Male 0 Female
6	ethnic	Ethnicity	radio, Required 1 Hispanic or Latino 2 Not Hispanic or Latino 3 Unknown 4 Declined to answer
7	race	Race	radio, Required 1 American Indian or Alaskan Native 2 Asian 3 Black or African American 4 Native Hawaiian or Pacific Islander 5 White 6 Mixed race 7 Unknown