

REDCap Beginner Training





Mathias ANTUNES

Data Manager
REDCap Referent



Rikia BOUCHELLIG

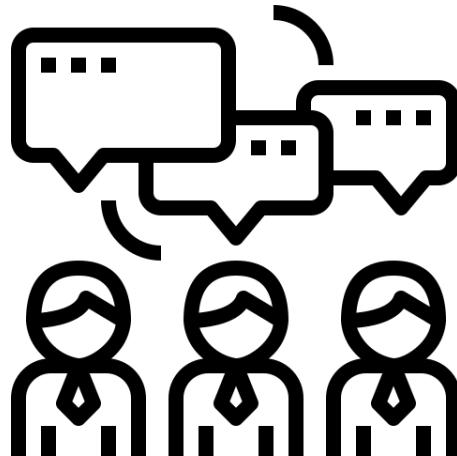
Data Manager

Official DataCore DM Team web page

<https://dac.institutducerveau-icm.org/service/data-management/>

Introduce yourselves !

Hi !



- **Introduction**

- Think data management before REDCap
- Quick REDCap introduction
- Who and How to REDCap ?

- **Practice overview**

- Basics, first connexion & designer
- Project types, structure your data
- User management
- Export & Report
- More

Think data management



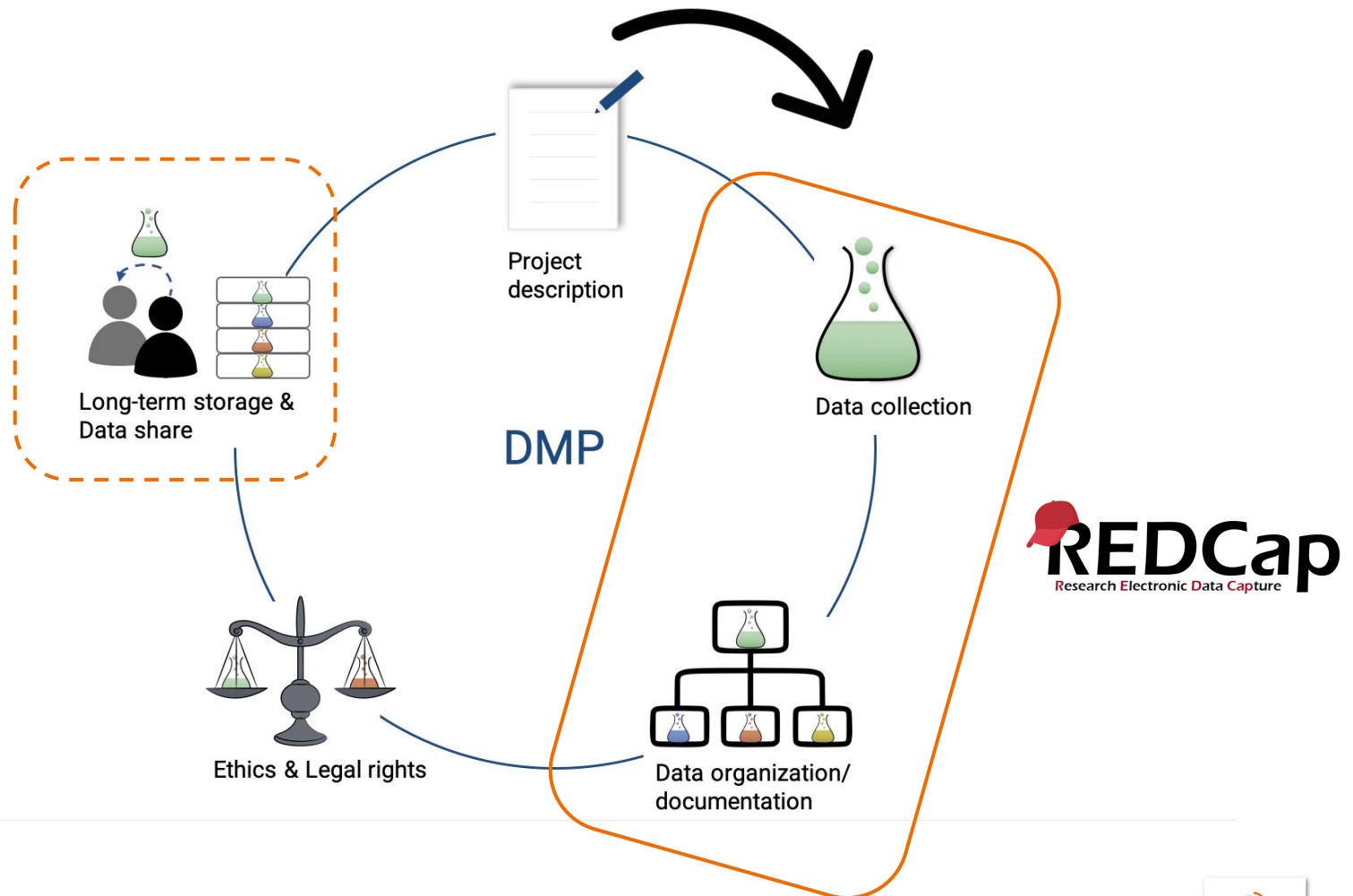
CHERCHER, TROUVER, GUÉRIR, POUR VOUS & AVEC VOUS.

Data Management Plan

A **data management plan** or DMP is a formal document that outlines how data are to be handled both during and after a research project

- It is important for the IT to help you store your data
- Will be mandatory for all researchers at ICM
- Templates are available on dmp.opidor.fr
- Trainings are available at ICM

Data Management Plan



FINDABLE

Unique identifiers and metadata are used to allow data to be located quickly and efficiently



ACCESSIBLE

Data is open, free and universally available for research discovery efforts



INTER-OPERABLE

A common programming language is used to allow use in a broad range of applications



REUSABLE

All data is clearly described and outlines associated data-use standards



XNAT

Labguru

Data systems used at the
ICM

OMERO

Identity
Manager

REDCap








Lustre

TumoroteK

Conclusion

ICM

Our scientific data ecosystem

		 			
Biological Sample	Electronic Lab Notebook (ELN)	Clinical and personal data	Microscopy images	MRI	Files (Video, images, Big data, OMICS)
Always ask information to your local IT correspondents					
Sylvie FORLANI (Biobank)	Mehdi Sophien (DSI)	Mathias Antunes (DAC)	Alix D (DSI)	Alix D (DSI)	DSI ticket
tumorotek.icm-institute.org	cle.inserm.fr/users/sign_in	redcap-icm.icm-institute.org	omero-prod.icm-institute.org	xnat.icm-institute.org	/network/lustre/

DAC Data Management Services

- Revu d'eCRF REDCap en développement (Variables, intégrité des données,...)
- Création d'un eCRF à partir d'un CRF papier
- Création de queries à partir d'un DVP
- Exécution de queries et génération d'un rapport
- Revu d'un eCRF en production avec les données saisies
- Rédaction/Revue d'un DMP
- Recherche/Intégration de fonctionnalités spécifiques
- etc

The REDCap project

The goal



CHERCHER, TROUVER, GUÉRIR, POUR VOUS & AVEC VOUS.



The goal of REDCap

eCRF

Paper questionnaire

Disparition des tumeurs depuis la dernière consultation : Oui (Y) Non (N)

Alcool : Non (Y) Grade 1 (Y) Grade 2 (Y) Grade 3 (Y) Grade 4 (Y)

Vomissements : Non (Y) Grade 1 (Y) Grade 2 (Y) Grade 3 (Y) Grade 4 (Y)

Autre : Oui (Y) Non (Y)

Sexe (préciser) : _____

Date de la visite : 1 2 3 4 5 6 7 8 9 10 11 12

PREMIERE CONSULTATION : _____

DEUXIEME CONSULTATION : _____

Noms et signature du médecin : _____

Examens	Quelques examens	Quelques examens	Quelques examens	Quelques examens
Niveau	Examen	Examen	Examen	Examen
Vomissements	Examen	Examen	Examen	Examen

Secure and collaborative interface

Editing existing Study ID 001

Study ID: 001

First Name: _____

Last Name: _____

Phone number: _____

Date of birth: _____ Today Y-M-D

Age (years): _____ View equation

Gender: ☐ Female ☒ Male

Form Status: _____

Complete?: ☐ Incomplete ☐ Complete

Lock this record for this form? ☐ Lock

Save & Exit Form Save & Go To Next Form



Worksheet	Field	Field Description and Instructions	Allowable Values	Required
CRF	CRF_NAME	Enter the name of your case report form (CRF) here. It must be between 1 and 255 characters long. This is a required field.	Text	Y
	VERSION	Enter the name of this version of the case report form (CRF) here. It must be between 1 and 255 characters long. This is a required field.	Text	Y
	VERSION_DESCRIPTION	Enter a description of this version of the case report form (CRF) here. It must be between 1 and 3999 characters long.	Text	Y
	REVISION_NOTES	Enter revision notes for this version of the case report form (CRF) here. The revision notes must be between 1 and 255 characters long.	Text	Y
Sections	SECTION_LABEL	Enter a label for each section of the CRF. It must be between 1 and 255 characters long, and can have spaces. Each section must have a valid section_label, and the CRF must have at least one section. Each item in the CRF must be assigned to a section.	Alphanumeric text, no spaces	Y
	SECTION_TITLE	Enter a name for each section of your case report form (CRF) here. It must be between 1 and 2000 characters long. This is a required field.	Text	Y
	SUBTITLE	Enter a subtitle and/or header text that should be shown at the top of the section. It must be between 1 and 2000 characters long. This field is optional. In addition to a subtitle for the section, you may add instructions to show at the top of the section. The instructions	Text	N

Excel

Record Status Dashboard

Add / Edit Records

Study ID 13 Doe, John* Select other record

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
- Randomization
- Data Quality
- API and API Playground
- REDCap Mobile App

Study ID 13 successfully edited

Study ID 13 Doe, John* (Arm 1: Drug A)

Data Collection Instrument	Enrollment	Visit 1	Dose 1	Visit 2	Visit 3	Final visit
Demographics (survey)	<input checked="" type="radio"/>					
Contact Info (survey)	<input checked="" type="radio"/>					
Baseline Data	<input checked="" type="radio"/>					
Visit Lab Data		<input checked="" type="radio"/>		<input checked="" type="radio"/>	<input checked="" type="radio"/>	
Patient Morale Questionnaire		<input checked="" type="radio"/>		<input checked="" type="radio"/>	<input checked="" type="radio"/>	
Visit Blood Workup		<input checked="" type="radio"/>		<input checked="" type="radio"/>	<input checked="" type="radio"/>	
Visit Observed Behavior		<input checked="" type="radio"/>		<input checked="" type="radio"/>	<input checked="" type="radio"/>	
Completion Data						<input checked="" type="radio"/>
Completion Project Questionnaire						<input checked="" type="radio"/>

Lock all forms across all Events

Unlock all forms across all Events

REDCap Admin

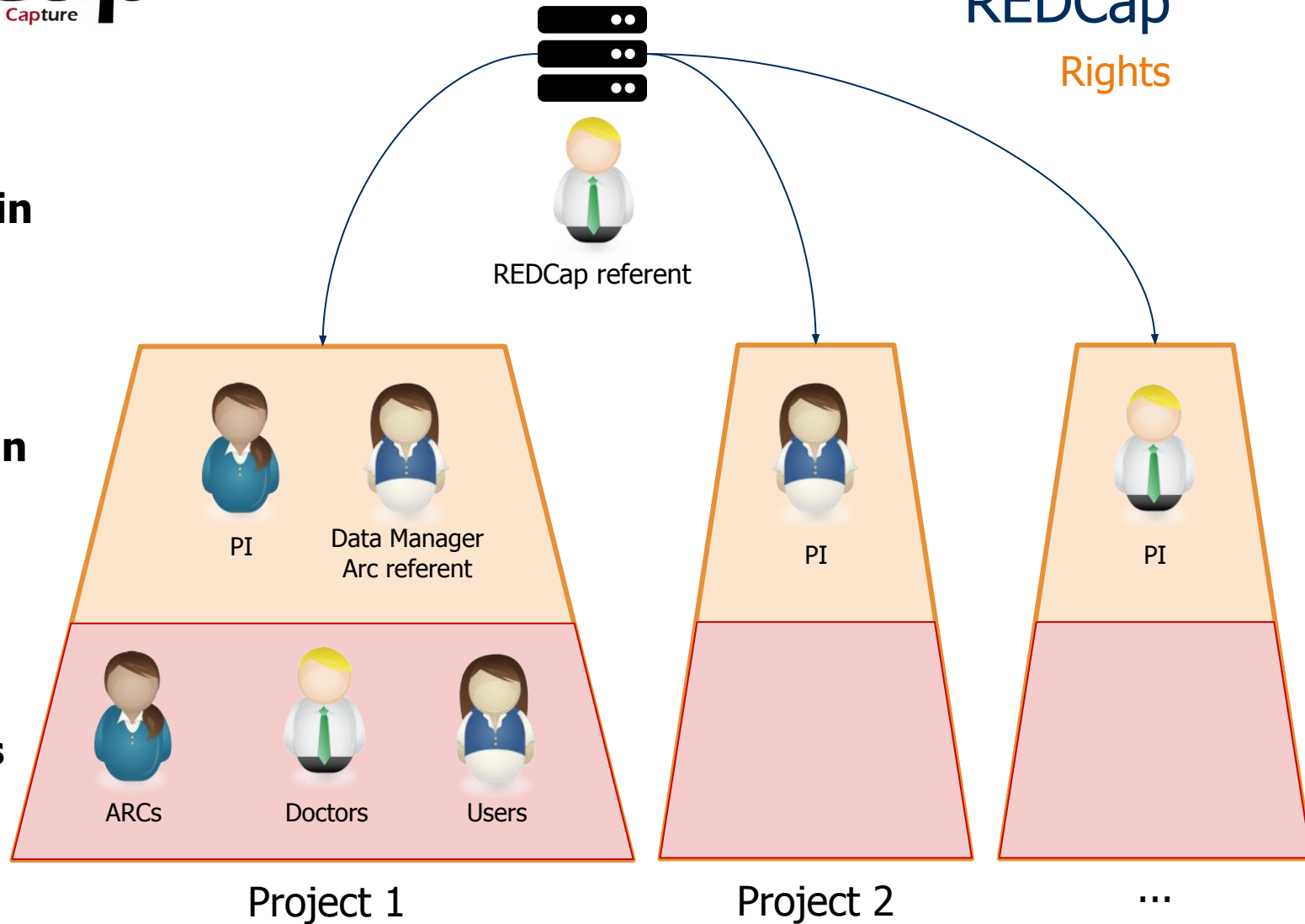
Database knowledge

Project Admin

Manage the project

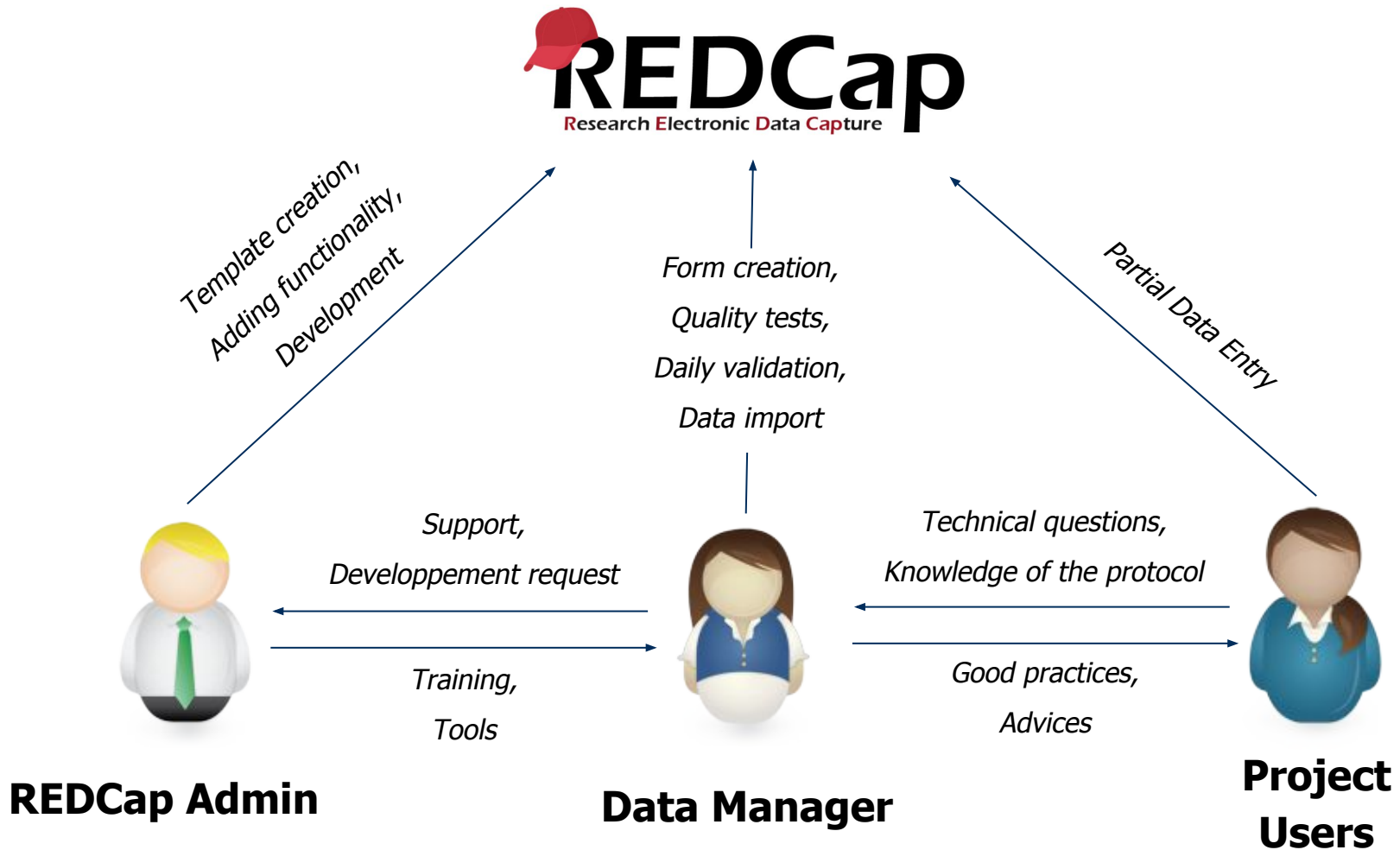
Project Users

Custom rights for each



REDCap

Who and How



Practice overview

Create a project from scratch

CHERCHER, TROUVER, GUÉRIR, POUR VOUS & AVEC VOUS.



Practice guidelines

To do !

Account

- ☐ [How to get help](#)
- ☐ [How to get an account](#)
- ☐ [Login in & Password issues](#)
- ☐ [REDCap Home page and tabs](#)

Design

- ☐ [Join or Create a project](#)
- ☐ [Create an instrument \(form\)](#)
- ☐ [Create a field \(text, date,...\)](#)
- ☐ [Branching logic](#)
- ☐ [Manage IDs](#)
- ☐ [IDManager by ICM](#)

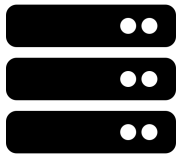
Structure

- ☐ [Data entry & Dashboard](#)
- ☐ [Adding users & roles](#)
- ☐ [Longitudinal](#)
- ☐ [Surveys & Public Survey](#)
- ☐ [Dev vs Prod Status](#)

Other

- ☐ [Report](#)
- ☐ [Export \(Excel & CSV\)](#)
- ☐ [PDFs](#)
- ☐ [Good practices on data](#)
- ☐ [Conclusion](#)

Centre d'Investigation Clinique
de Neurosciences Production Server

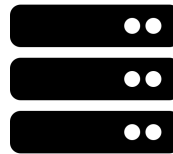


REDCap CIC

Specific account

<https://redcap-cic.icm-institute.org/>

ICM Production Server

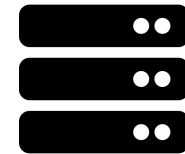


REDCap ICM

Specific account

<https://redcap-icm.icm-institute.org/>

ICM Staging server



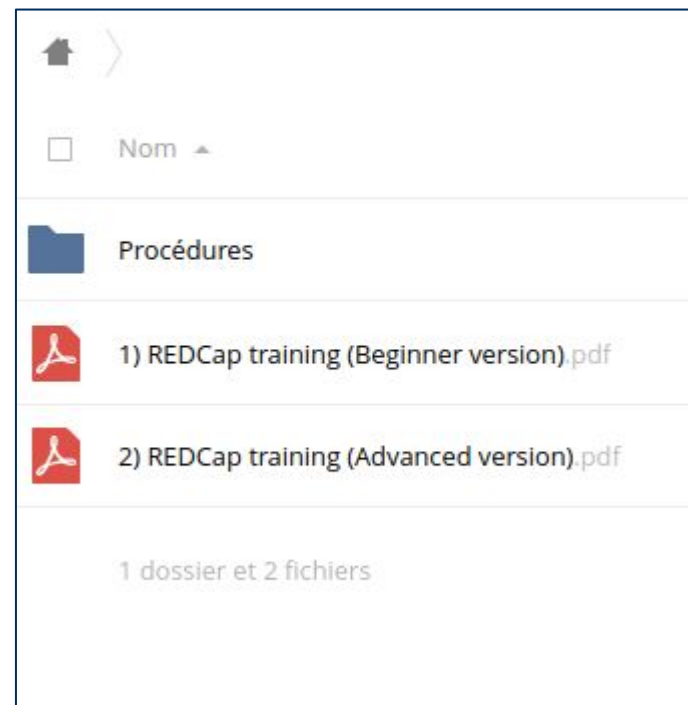
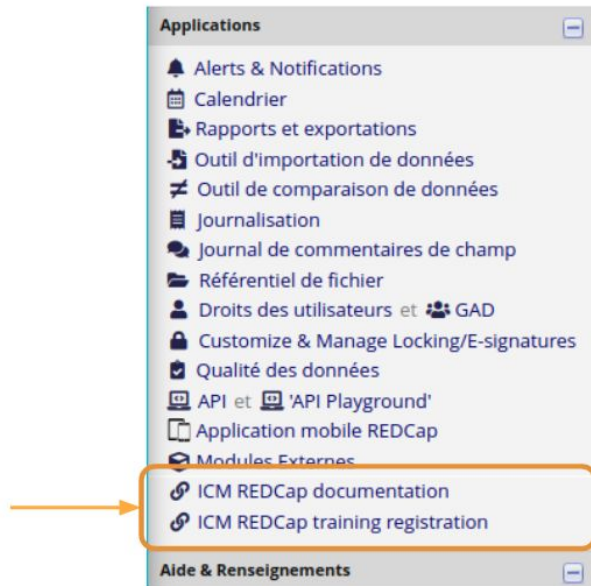
REDCap Dev

ICM login

<https://redcap-icm-staging.icm-institute.org/>

How to get help

REDCap Support :



Trainings !

Neuroinformatics Team

ALL the slides :

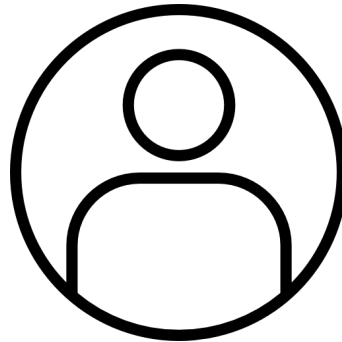
<https://owncloud.icm-institute.org/index.php/s/214kbeyMEFohgA5>

Training schedule & Register is available for ICM people here :

<https://neuroinformatics.icm-institute.org/training-program/>

Get an account

ICM account



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First connection at ICM

ICM Clinical production —→ [https://redcap-**icm**.icm-institute.org/](https://redcap-icm.icm-institute.org/)

ICM Clinical production —→ https://is.gd/redcap_icm_request

CIC Clinical production —→ [https://redcap-**cic**.icm-institute.org/](https://redcap-cic.icm-institute.org/)

CIC Clinical production —→ https://is.gd/redcap_cic_request

Access request



Log In



ICM Production Server

Access request

Need an account or a project? [Click here](#)

Please log in with your user name and password. If you are having trouble logging in, please contact [the ICM REDCap administrators](#).

Username:

Password:

Log In

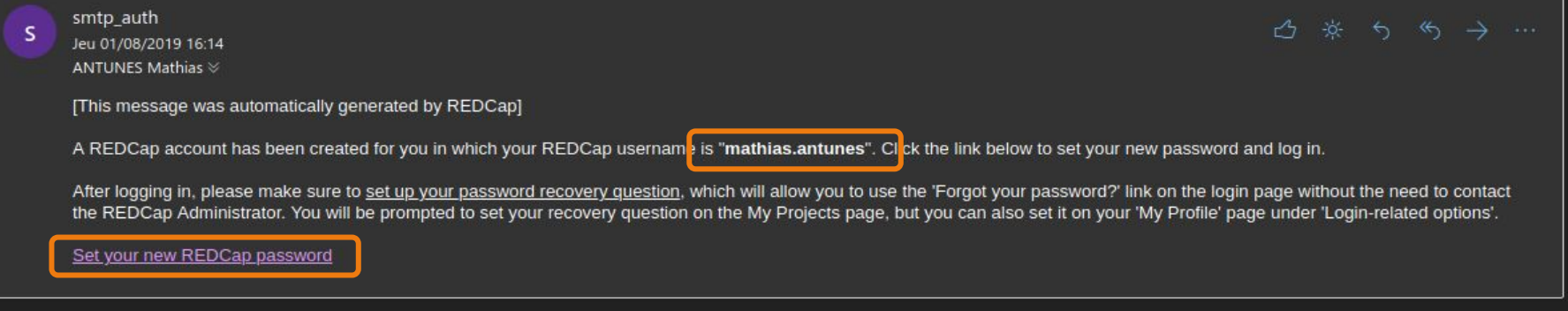
[Forgot your password?](#)

First connection at ICM

Check your spam for this email :

- Contains your username
- Contains a link to set your password

REDCap access granted



smtp_auth
Jeu 01/08/2019 16:14
ANTUNES Mathias ✓

[This message was automatically generated by REDCap]

A REDCap account has been created for you in which your REDCap username is "mathias.antunes". Click the link below to set your new password and log in.

After logging in, please make sure to set up your password recovery question, which will allow you to use the 'Forgot your password?' link on the login page without the need to contact the REDCap Administrator. You will be prompted to set your recovery question on the My Projects page, but you can also set it on your 'My Profile' page under 'Login-related options'.

[Set your new REDCap password](#)

Exercise

1. Go to <https://redcap-icm-staging.icm-institute.org/>
2. If you have an ICM account, connect
3. If you don't, check your email and create it

Password issues

Reset password



Password issues

Secret question

The screenshot shows a web browser window with the Paris Brain Institute ICM logo at the top. A modal dialog box titled "Set Up Password Recovery Question" is open. The dialog contains the following text:

To help you easily and quickly recover your REDCap password (in case you forget it in the future), we need you to select a security question of your choice below and then provide an answer for it. Once you have filled out this information, if you forget your password, you can click the 'Forgot Your Password?' link on the REDCap login screen, and it will ask you to provide a correct answer to your security question (the one you will select below). In such a case, it will send a new temporary password to the email address associated with your REDCap account. Setting up your password recovery question below will prevent you from having to wait on a REDCap administrator to reset it manually if you ever forgot your password.

Below this text is a red-bordered box with the following notice:

NOTICE: It is highly recommended that you set your password recovery question now, or else you might get accidentally locked out of your REDCap account.

The form fields are:

- Select a question:** A dropdown menu with the text "- select a security question -".
- Provide answer to question:** A text input field with the placeholder "(not case sensitive)".
- Please confirm your email address:** A text input field with a small email icon to its right. Below it, in smaller text, is "(If you attempt to recover your password, your new password will be sent to this email address.)".

At the bottom of the dialog are two buttons: "Save" and "Not now. Remind me again in 2 days.".

In the background, parts of the website are visible, including a sidebar with "Need an" and "Welcome to", and a main content area with text about REDCap and a "Easily manage a contact list of survey respondents or create a simple survey link" section.

Answer the secret question to be able to reset your password later !

Password issues

Get help



Log In



ICM Production Server

Need an account or a project?: [Click here](#)

Please log in with your user name and password. If you are having trouble logging in, please contact [the ICM REDCap administrators](#).

Username:

Password:

Log In

[Forgot your password?](#)

Email contact REDCap

Forgot password.
! Only works if you have answered the secret question.

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

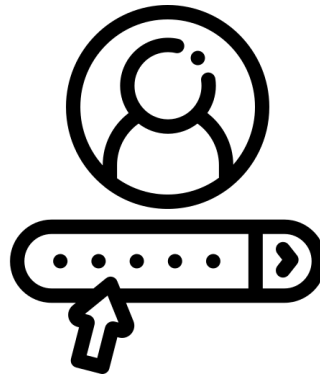
REDCap Features

Build online surveys and databases quickly and securely - Create and design your project rapidly using secure web authentication from your browser. No extra software is required.

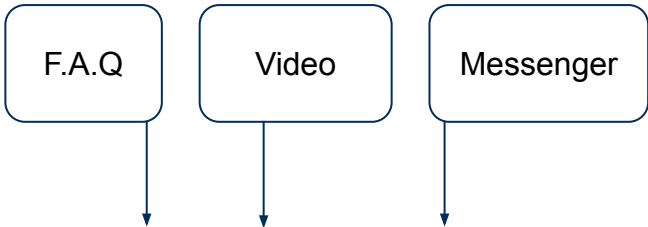
Fast and flexible - Conception to production - fast and easy to use. REDCap is designed to be used by non-technical users.


REDCap home page

Login in




First connection



 Home **My Projects** [+ New Project](#) [Help & FAQ](#) [Training Videos](#) [Send-It](#) [Messenger](#)

Logged in as **test.user** [My Profile](#) [Log out](#)


Serveur de Développement / Formation

Ce serveur ne doit pas contenir de données cliniques, il a uniquement une vocation de test !

Demande d'accès/ Request Access: Cliquez ici / Click here

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](#)

Project Title	Records	Fields	Instrument	Type	Status
TEST_Mathias	18	74	2 forms 7 surveys		
Longitudinal Database (2 arms)	2	98	8 forms		
Longitudinal Database (1 arm)	2	98	8 forms		
Multiple Surveys (longitudinal)	5	31	1 form 3 surveys		
Repeating Instruments	6	139	6 forms		
SPATAX	11	476	21 forms		
Projet_test	0	8	2 forms		
Formation	0	2	1 form		
shazam test	2	66	1 survey		

Create a project

Your informations

List of the project you have access to

Join a project

Start !



CHERCHER, TROUVER, GUÉRIR, POUR VOUS & AVEC VOUS.

Join a project

1. You have no account

- Fill the *access request form*, and then contact the *project admin*

2. You have an account but **no** project

- Contact the *project admin* to be added

3. You have an Account and the project

- Simply click on the project in the list in "*My projects*"

First connection

REDCap™

Home

My Projects

+ New Project

Help & FAQ

Training Videos


Send-It

Messenger

Logged in as test.user

My Profile

Log out



Serveur de Développement / Formation

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My Projects

Organize

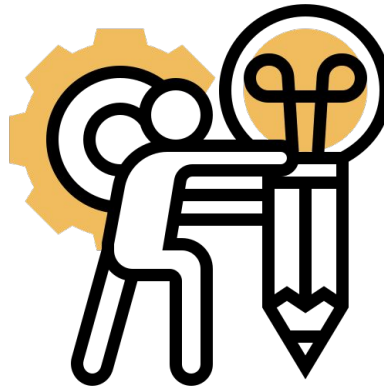
Filter projects by title

Project Title	Records	Fields	Instrument	Type	Status
TEST_Mathias	18	74	2 forms 7 surveys		
Longitudinal Database (2 arms)	2	98	8 forms		
Longitudinal Database (1 arm)	2	98	8 forms		
Multiple Surveys (longitudinal)	5	31	1 form 3 surveys		
Repeating Instruments	6	139	6 forms		
SPATAX	11	476	21 forms		
Projet_test	0	8	2 forms		
Formation	0	2	1 form		
shazam test	2	66	1 survey		

List of the project you have access to

Create a project

Let's go !



Create a project

Create a project



On the production server
you might not have it !
You need to request it !

REDCap

Home

My Projects

New Project

Help & FAQ

Training Videos

Send-It

Messenger

Logged in as test.user

My Profile

Log out

Serveur de Développement / Formation

Ce serveur ne doit pas contenir de données cliniques, il a uniquement une vocation de test !

Demande d'accès/ Request Access: Cliquez ici / Click here

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My Projects

Organize

Filter projects by title

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SPATAX	11	476	21 forms		
Projet_test	0	8	2 forms		
Formation	0	2	1 form		
shazam test	2	66	1 survey		

The projects listed below are public and are accessible by anyone. No authentication (i.e. username/password) is required to access them directly.

Public Projects

Basic Demography

Classic Database

Human Cancer Tissue Biobank

Longitudinal Database (1 arm)

Longitudinal Database (2 arms)

Multiple Surveys (classic)

Create a project on ICM production server

1. No account

- *Fill the access request form, specifying the new project*

2. Account but no button



- *Fill the request form with the correct information*

3. Account and button



- *Simply click it and create your project*

Create a project

REDCap

HomeMy ProjectsNew ProjectHelp & FAQTraining VideosSend-ItMessenger

Logged in as test.userMy ProfileLog out

+ 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?

---- Select One ----

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)

Choose a project template (comes pre-filled with fields, forms/surveys, and other settings)

select template	Template title (sorted by title)	Template description
<input type="radio"/>	Classic Database	Contains six data entry forms, including forms for demography and baseline data, three monthly data forms, and concludes with a completion data form.
<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 events.
<input type="radio"/>	Longitudinal Database (2 arms)	Contains nine data entry forms (beginning with a demography form) for collecting data on two different arms (Drug A and Drug B) with each arm containing eight different events.

Create Project

Cancel

REDCap 8.10.2 - © 2020 Vanderbilt University

Inside a project

Create forms



Configure your project

7 Steps

Longitudinal Database (1 arm)

Project status: Development Completed steps 0 of 8

Main project settings

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

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

Modify project title, purpose, etc.

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](#)

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](#)

Enable optional modules and customizations

Enable ☐ Repeatable instruments and events [?](#)

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

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

Enable ☐ Randomization module [?](#)

Enable ☐ Designate an email field for sending survey invitations [?](#)

[Additional customizations](#)

Settings displayed to Administrators only:

Enable ☐ Clinical Data Pull from EHR [?](#)

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

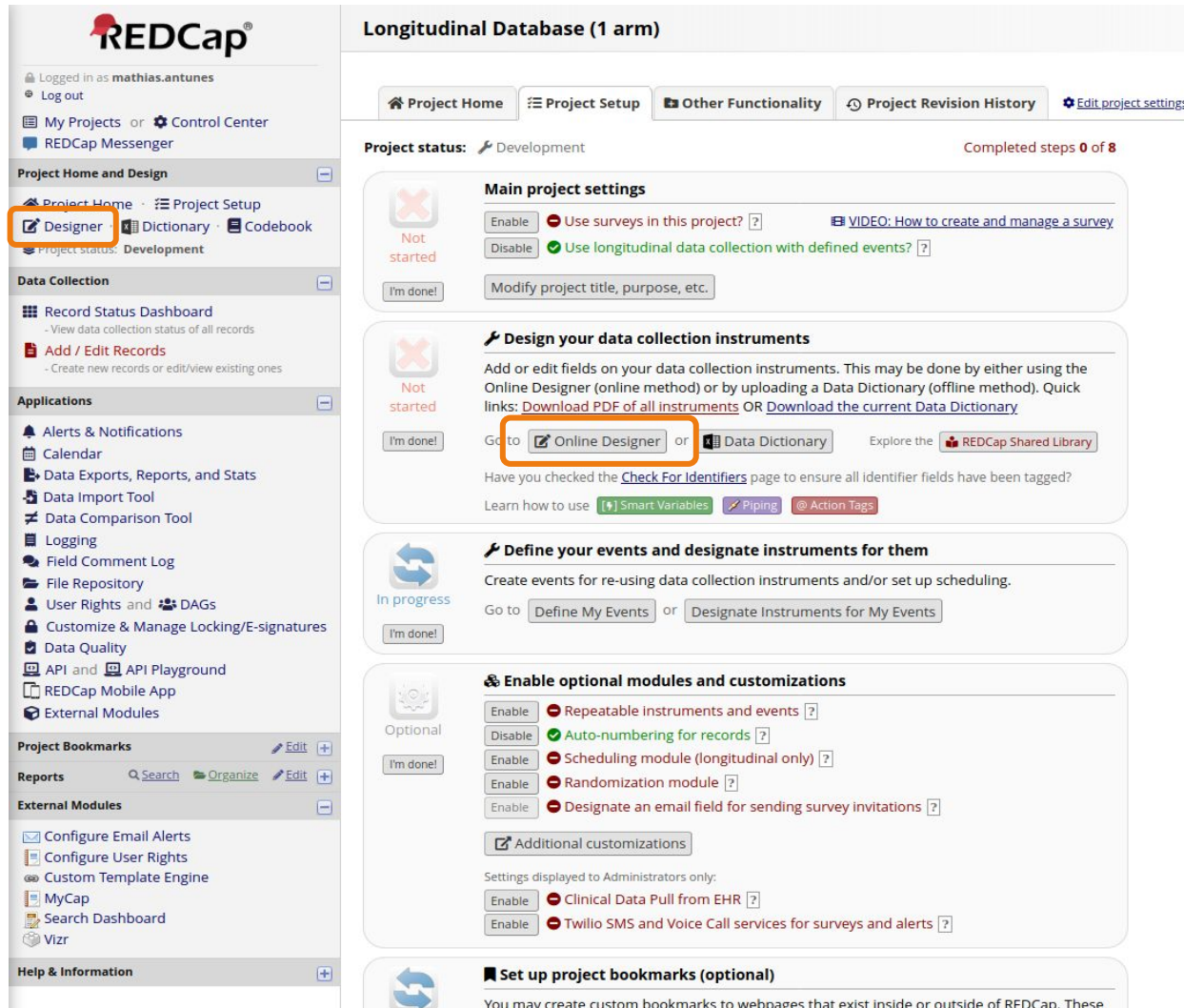
Set up project bookmarks (optional)

You may create custom bookmarks to webpages that exist inside or outside of REDCap. These

Callouts:

- Type of project
- Create variables
- Additional configuration
- Check the marker when you're done with a part to remind you you've done it!

Create an instrument



REDCap®

Logged in as mathias.antunes
Log out

My Projects or Control Center
REDCap Messenger

Project Home and Design

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

Data Collection

Record Status Dashboard
- View data collection status of all records
Add / Edit Records
- Create new records or edit/view existing ones

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

Project Bookmarks Edit +

Reports Search Organize Edit +

External Modules

Configure Email Alerts
Configure User Rights
Custom Template Engine
MyCap
Search Dashboard
Vizr

Help & Information +

Longitudinal Database (1 arm)

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

Project status: Development Completed steps 0 of 8

Main project settings

Not started

Enable Use surveys in this project? VIDEO: How to create and manage a survey
Disable Use longitudinal data collection with defined events?
I'm done! Modify project title, purpose, etc.

Design your data collection instruments

Not started

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
I'm done!

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

Define your events and designate instruments for them

In progress

Create events for re-using data collection instruments and/or set up scheduling.
Go to Define My Events or Designate Instruments for My Events
I'm done!

Enable optional modules and customizations

Optional

Enable Repeatable instruments and events
Disable Auto-numbering for records
Enable Scheduling module (longitudinal only)
Enable Randomization module
Enable Designate an email field for sending survey invitations
I'm done! Additional customizations

Settings displayed to Administrators only:
Enable Clinical Data Pull from EHR
Enable Twilio SMS and Voice Call services for surveys and alerts

Set up project bookmarks (optional)

In progress

You may create custom bookmarks to webpages that exist inside or outside of REDCap. These

Create an instrument

REDcap
Logged in as **test.user** | Log out

My Projects
Project Home or Project Setup
REDCap Messenger
Project status: Development

Data Collection Edit instruments

Record Status Dashboard
- View data collection status of all records
Add / Edit Records
- Create new records or edit/view existing ones
Show data collection instruments

Applications

- Calendar
- Data Exports, Reports, and Stats
- Data Import Tool
- Data Comparison Tool
- Logging
- Field Comment Log
- File Repository
- User Rights and DAGs
- E-signature and Locking Mgmt
- Data Quality
- REDCap Mobile App
- External Modules

External Modules

- Configure Email Alerts
- Configure User Rights
- Custom Template Engine
- MyCap
- Search Dashboard
- Vizr

Help & Information

ICM Brain & Spine Institute
Institut du Cerveau et de la Moelle épinière Inserm Cnrs Umr

Projet_test

Project Home Project Setup Online Designer Data Dictionary

Create snapshot of instruments VIDEO: How to use this page
Last snapshot: 09/12/2019 14:34

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.

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	Instrument actions
My First Instrument	1		Choose action

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Instrument name	Fields	View PDF	Instrument actions
My First Instrument	4		Choose action

New instrument name: Create Cancel


Creation & Import



Default instrument



Exercice

1. Create an empty instrument "instrument 2"





Ajouter un nouveau formulaire :

 **Créer** un nouveau formulaire à partir de zéro

 **Importer** un nouveau formulaire de la [Bibliothèque partagée Vanderbilt](#) 

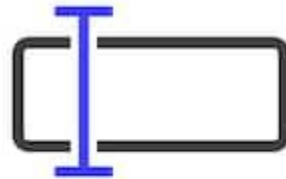
 **Importer** formulaire ZIP d'un autre projet/utilisateur ou [bibliothèques externes](#) 

2. Rename it to "instrument 3"

My First Instrument	4		Choose action ▾
			 Rename
			 Copy
			 Delete
			 Download instrument ZIP

Create data fields

Inside forms



Go inside an instrument

The screenshot displays the REDCap web interface. On the left is a sidebar with navigation links: 'My Projects', 'Project Home', 'Project Setup', 'REDCap Messenger', 'Data Collection', 'Record Status Dashboard', 'Add / Edit Records', 'Applications', and 'External Modules'. The main content area is titled 'Projet_test' and includes tabs for 'Project Home', 'Project Setup', 'Online Designer', and 'Data Dictionary'. Below these tabs, there's a section for 'Add new instrument:' with options to 'Create', 'Import', or 'Upload'. A table titled 'Data Collection Instruments' lists existing instruments. The first instrument, 'My First Instrument', is highlighted with an orange box. A blue arrow points from this box to a callout box on the right that says 'Access an instrument'.

Logged in as **test.user** | Log out

My Projects
Project Home or Project Setup
REDCap Messenger
Project status: Development

Data Collection [Edit instruments](#)

Record Status Dashboard
- View data collection status of all records
[Add / Edit Records](#)
- Create new records or edit/view existing ones
[Show data collection instruments](#)

Applications

- Calendar
- Data Exports, Reports, and Stats
- Data Import Tool
- Data Comparison Tool
- Logging
- Field Comment Log
- File Repository
- User Rights and DAGs
- E-signature and Locking Mgmt
- Data Quality
- REDCap Mobile App
- External Modules

External Modules

- Configure Email Alerts
- Configure User Rights
- Custom Template Engine
- MyCap
- Search Dashboard
- Vizr

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Projet_test

Project Home Project Setup Online Designer Data Dictionary

Create snapshot of instruments
Last snapshot: 09/12/2019 14:34 ? [VIDEO: How to use this page](#)

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- 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	Instrument actions
My First Instrument	1		Choose action

Access an instrument

Create a field

Logged in as test.user | Log out

My Projects

Project Home or Project Setup

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Project status: Development

Data Collection Edit instruments

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Create snapshot of instruments VIDEO: How to use this page

Last snapshot: 09/12/2019 14:34

This module will allow you to create new data collection instruments/surveys or edit existing ones. Changes may be made by either using the **Online Designer** or **Upload Data Dictionary** (see tabs above), in which you may use either method or both. The Online Designer may help you get some initial fields/forms built quickly or to make quick edits, but using the Data Dictionary file may be more helpful if you will be adding a large number of fields for this project.

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. *Are you using Action Tags yet? If not, learn about Action Tags here.*

Return to list of instruments

Current instrument: My First Instrument Preview instrument

Variable: record_id

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

Documentation

Field creation

Create a variable

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)

Editing existing Record ID 1

Record ID

1

To rename the record, see the record action drop-down at top of the [Record Home Page](#).

Text

date

24-02-2020

Today

D-M-Y

note

Expand

Drop down

Radio button

1

2

3

reset

Multiple checkbox

1

2

3

Yes /NO

Yes

No

reset

Signature

Add signature

File

Upload file

Section

Slider

Change the slider above to set a response

reset

Create a variable

BP : Intelligible question

Question / phrase
affichée "Label"

Information (units,..)

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 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

Action Tags / Field Annotation (optional)

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

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

ONLY letters, numbers, and underscores

☐ Enable auto naming of variable based upon its Field Label?

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

Validation? (optional) ---- None ----

- or -

-- select ontology service --

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

Save

Cancel

Variable's unique
name

BP : legible et descriptive

- Validation ? (optionnel)

---- Aucune ----

---- Aucune ----

 - Code Postal 5 caracteres (France)
 - Date (D-M-Y)
 - Date (Y-M-D)
 - Datetime (D-M-Y H:M)
 - Datetime w/ seconds (D-M-Y H:M:S)
 - Datetime w/ seconds (Y-M-D H:M:S)
 - Email
 - Integer
 - Letters only
 - MRN (10 digits)
 - MRN (generic)
 - Number
 - Number (2 decimal places)
 - Number (3 decimal places)
 - Number (4 decimal places)
 - Time (HH:MM)
 - Vanderbilt MRN

Variable unique name

best practice

Example

~~ps_x2~~

patient_gender








BP : short but lisible

~~sex_or_gender_of_the_patient~~

 Codebook

 Print page

 Data Dictionary Codebook








	#	Variable / Field Name	Field Label <i>Field Note</i>	Field Attributes (Field Type, Validation, Choices, Calculations, etc.)
Instrument: Demographics (demographics)				
	1	study_id	Study ID	text
 	2	date_enrolled	Section Header: <i>Consent Information</i> Date subject signed consent <i>YYYY-MM-DD</i>	text (date_ymd)
 	3	patient_document	Upload the patient's consent form	file
 	4	first_name	Section Header: <i>Contact Information</i> First Name	text, Identifier







Label

Rich text editor

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

Field Label ☒ Use the Rich Text Editor ?

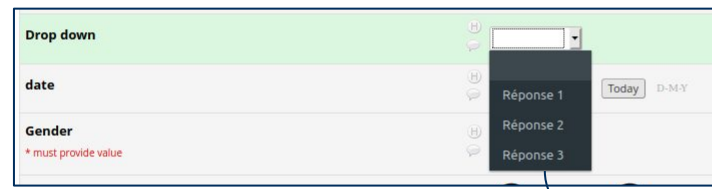
Paragraph **B** *I*       

   A    *I*_x

Maiden surname

Drop down variable

Avoid free text



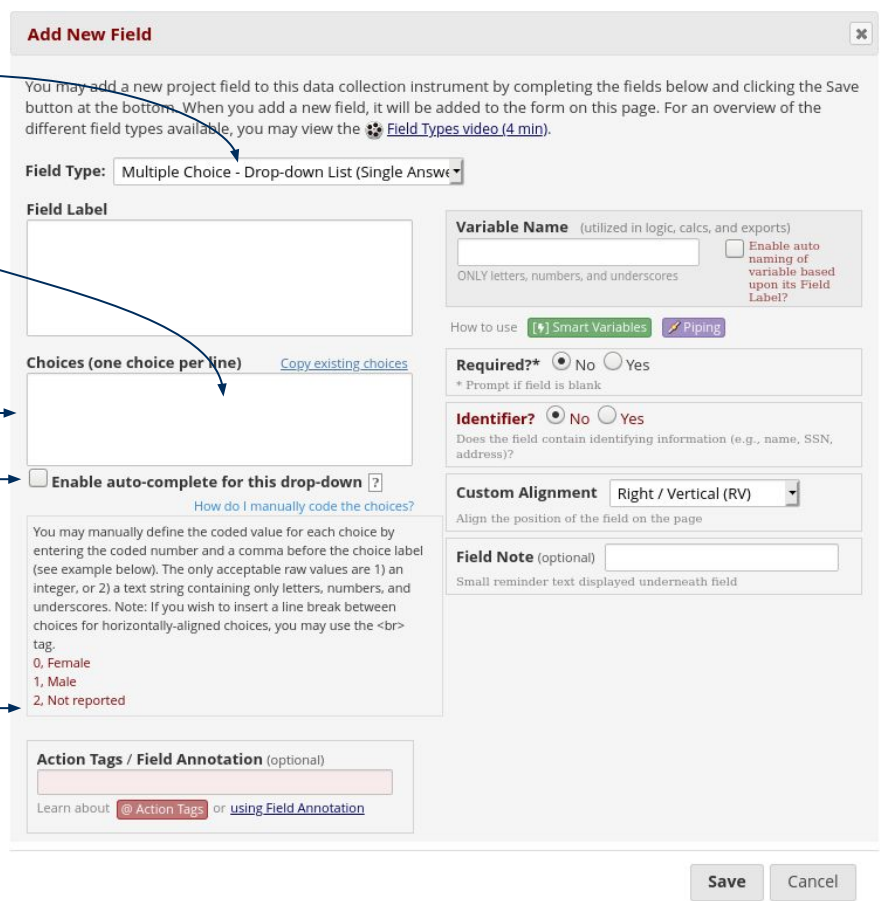
Choices

Stored value, Displayed value

Best Practices :

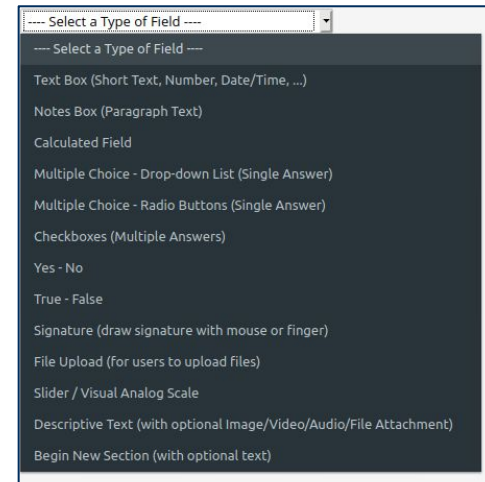
- **Human readable** stored value if possible (no space)
- **Consistency** between projects (0, H; 1,F)

If you paste a big list, REDCap will autonumber it



Exercise

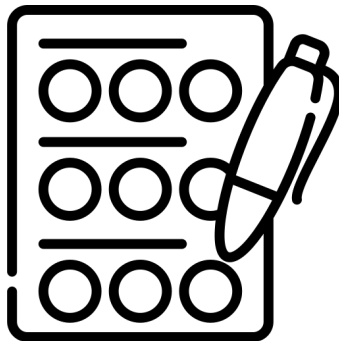
- Create 3 variables in an Instrument
 - “Date of inclusion” : Format DD-MM-YYYY
 - “Height in cm” : Integer with min max and “cm” in Note
 - “Year of birth” of the patient (Integer with min and max)



- Add action tags
 - The date field should be prefilled but not editable (Add @Readonly and @Today)
- Visit the **CodeBook** to see all your variables

Matrix creation & more

Other fields



Complex fields

Matrix

Logged in as test.user | Log out

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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. *Are you using Action Tags yet? If not, learn about Action Tags here.*

Return to list of instruments

Current instrument: My First Instrument Preview instrument

Variable: record_id

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

Matrix creation

Complex fields

Matrix

Matrix examples

REDCap can display a matrix group of fields as either Single Answer (Radio Buttons) or Multiple Answers (Checkboxes). The first matrix below displays a group of fields as radio buttons, while the second matrix displays a group as checkboxes. Using a section header is optional when building a matrix. The field labels on the left-hand side of each field will always be given the same width, but the width of each individual choice column will vary depending on how many choices exist. Thus the more choices you have, the narrower each choice column will be.

The following qualities are important in my supervisor:

	Extremely Important	Very Important	Somewhat Important	Slightly Important	Not Important at All	
1) BELIEVABLE	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	reset
2) APPROACHABLE	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	reset
3) HONEST	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	reset
4) SUCCESSFUL	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	reset
5) QUALIFIED	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	reset

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"/>	

Close

Add 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)

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
ONLY letters, numbers, and underscores

Required?*Field Annotation ?

Add another row

Matrix Column Choices

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

How do I manually code the choices?

Other Matrix Info

Answer Format:
Single Answer (Radio Buttons)

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

Matrix group name: ONLY letters, numbers, and underscores
[What is a matrix group name?](#)

Save

Cancel

Branching Logic



Hide or display variables

Branching logic

Current instrument: **My First Instrument** Preview instrument

Variable: record_id

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

Variable: gender

Gender

☐ Male

☐ Female

reset

Add Field Add Matrix of Fields

Variable: maiden_surname

Maiden surname

Add Field Add Matrix of Fields



If Female then ask for Maiden surname

Hide or display variables

Branching logic

Add/Edit Branching Logic

Branching Logic may be employed when fields/questions need to be hidden under certain conditions. If branching logic is defined, the field will only be visible if the conditions provided are true (i.e. show the field only if...). You may specify those conditions in the text box below for the Advanced Branching Logic Syntax or by choosing the Drag-N-Drop Logic Builder method, which allows you to build your logic in a much easier fashion by simply dragging over the options you want. You may switch back and forth between each method if you wish, but please be aware that since the advanced logic allows for greater complexity, it may not be able to be switched over to the Drag-N-Drop method if it becomes too complex.

Choose method below for the following field: **maiden_surname** - Maiden surname

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

Show the field ONLY if...

Test logic with a record: -- select record -- [Clear logic](#)

OR

☒ **Drag-N-Drop Logic Builder**

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

- record_id = (define criteria)
- gender = Male (h)
- gender = Female (f)
- my_first_instrument_complete = Incomplete (0)
- my_first_instrument_complete = Unverified (1)
- my_first_instrument_complete = Complete (2)

Show the field ONLY if...

☒ ALL below are true
☐ ANY below are true

Drag and Drop

[Clear logic](#)

[Save](#) [Cancel](#)

Current Instrument: **My First Instrument**[Preview instrument](#)

Variable: record_id

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](#)

Variable: gender

Gender

☐ Male
☐ Female

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

Variable: maiden_surname

Maiden surname

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

Show the field ONLY if...

☒ ALL below are true
☐ ANY below are true

gender = Female (f) **X**

[Clear logic](#)

Quick Exercise

1. Create "Maiden surname" text field
2. Create "Gender" field radio button
3. Display "Maiden surname" only if Gender is = Female

Best Practices

The **less fields** are displayed, the **less confused** is the user

The image shows the 'Add/Edit Branching Logic' dialog box on the left and the 'My First Instrument' preview on the right. The dialog box has two tabs: 'Advanced Branching Logic Syntax' and 'Drag-N-Drop Logic Builder'. The 'Drag-N-Drop Logic Builder' tab is selected, showing a list of field choices on the left and a logic builder area on the right. A red box highlights the 'Maiden surname' field in the preview, and an arrow points to the logic rule 'gender = Female (f)' in the logic builder. The logic rule is currently set to 'Show the field ONLY if...' and 'ALL below are true'.

Add/Edit Branching Logic

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Show the field ONLY if...

Test logic with a record: -- select record -- [Clear logic](#)

OR

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

- record_id = (define criteria)
- gender = Male (h)
- gender = Female (f)
- my_first_instrument_complete = Incomplete (0)
- my_first_instrument_complete = Unverified (1)
- my_first_instrument_complete = Complete (2)

Drag and Drop

Show the field ONLY if...

- ☒ ALL below are true
- ☐ ANY below are true

gender = Female (f) [Clear logic](#)

Current Instrument: My First Instrument [Preview Instrument](#)

Variable: record_id

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](#)

Variable: gender

Gender

☐ Male ☐ Female [reset](#)

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

Variable: maiden_surname

Maiden surname

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

Projet ID

Identify your data



Create a field

The screenshot displays the REDCap web interface. On the left is a sidebar with navigation menus: 'Project Home and Design' (containing Project Home, Project Setup, **Designer**, Dictionary, and Codebook), 'Data Collection' (containing Record Status Dashboard and Add/Edit Records), and 'Applications' (containing various tools like Alerts & Notifications, Calendar, Data Exports, etc.). The main content area is titled 'Projet_test' and includes tabs for Project Home, Project Setup, Online Designer, Data Dictionary, and Codebook. Below these tabs are buttons for 'Create snapshot of instruments' and a video link. A paragraph explains how to build and customize data collection instruments, mentioning the 'Add Field' button and the 'Delete' icon. A 'Return to list of instruments' button is also present. The 'Current Instrument: My First Instrument' section shows a form with three fields: 'Record ID' (labeled 'Variable: record_id'), 'date' (labeled 'Variable: date'), and 'Gender' (labeled 'Variable: gender'). The 'Record ID' field is highlighted with a red box and an arrow pointing to it from a callout box. The 'date' and 'Gender' fields also have 'Add Field' and 'Add Matrix of Fields' buttons below them.

Project ID

You can only rename it !

First field of the first instrument !



Good practices

Patient ID per project

- ✓ **Always create a formatted projet ID for patients**
 - Example :
 - The project name with a dash and three numbers
 - “Project-001” for my training project
 - Use an external module to create a custom ID
- It will help a lot for future **data management** and **data reconciliation** !

Activate the ID module

REDCap®

Logged in as **test.user** | Log out

My Projects

Project Home and Design

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

Data Collection — Lyon

- 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
- Show data collection instruments

Applications

- Alerts & Notifications
- Calendar
- Data Exports, Reports, and Stats
- Field Comment Log
- File Repository
- External Modules**
- ICM REDCap documentation
- ICM REDCap training registration

External Modules

- Shazam Setup

Help & Information

- Help & FAQ
- Video Tutorials
- Suggest a New Feature
- Contact REDCap administrator

Classic test **PID 115**

External Modules - Project Module Manager

External Modules are individual packages of software that can be downloaded and installed by a REDCap administrator. Modules can extend REDCap's current functionality, and can also provide customizations and enhancements for REDCap's existing behavior and appearance at the system level or project level.

As a user with Project Setup/Design privileges in this project, you can modify the configuration (if applicable) of any enabled module. Note: Only REDCap administrators are able to enable or disable modules.

DISCLAIMER: Please be aware that External Modules are not part of the REDCap software but instead are add-on packages that, in most cases, have been created by software developers at other REDCap institutions. Be aware that the entire risk as to the quality and performance of the module as it is used in your REDCap project is borne by you and your local REDCap administrator. If you experience any issues with a module, your REDCap administrator should contact the author of that particular module.

All external modules list here : <https://redcap.vanderbilt.edu/consortium/modules/index.php>

View available modules

Currently Enabled Modules

Search enabled modules

- Custom Log Entry - v1.0.0** **Discoverable**
Allows users to add a custom entry to a project's log, optionally linked to a record.
[View Documentation](#) **Disable**
- Image Map - v1.9.0**
This module replaces an input, radio, or checkbox field with an interactive image where users can click on image regions to select one or more field options. Find the complete **documentation** and an example instrument at <https://github.com/ctsit/imagemap>.
[View Documentation](#)
- Shazam - v1.3.10** **Enabled for All Projects**
A module for applying REDCap inputs into tabular or other custom layouts for surveys and data entry forms
[View Documentation](#) **Configure**
- Single Line System Informational Text - v1.0** **Enabled for All Projects**
Single line informational text to display at the top of all pages, can be used to distinguish between Demo, Test and UAT REDCap instances or to announce maintenance window , etc.
[View Documentation](#)

Activate the
module here

Activate the ID module

Available Modules

Custom Record Auto-numbering - v1.0.2 Discoverable
Allows users to create a custom record auto-numbering schema for their REDCap project. This works during data entry but not in public surveys or API/CSV data import.
[View Documentation](#)

Enable

Form Render Skip Logic - v3.3.13 Discoverable
This module hides and shows instruments based on the values of REDCap form fields. Multiple control fields can be defined to control the display of non-overlapping sets of forms.
[View Documentation](#)

Enable

Move Data to Other Event - v1.2.0 Discoverable
Allow privileged users to easily move data, uploaded files, and signatures between events.
[View Documentation](#)

Request Activation

Orca Search Module - v2.3.4 Discoverable
A configurable, searchable, and performant, list dashboard
[View Documentation](#)

Enable

REDCapPRO - v0.0.4 Discoverable
Patient Reported Outcomes in REDCap
This module provides a means of identifying and authenticating study participants when collecting survey data. It stores that information in the REDCap project's audit trail.
[See full documentation here.](#)
[View Documentation](#)

Enable

Simple Ontology Module - v0.5 Discoverable
This module provides site wide ontology lookup, and was written to test the ontology provider mechanism.
[View Documentation](#)

Enable

Activate the
module here

Configure the ID module

Configure Module: Custom Record Auto-numbering

Project: Classic test

Settings	Values
Options for record autonumbering in this project.	
Record auto-numbering option: <small>* must provide value</small>	Padded integer increment with prefix
Specify a fixed prefix (can be blank):	Projectname_
Padding (with zeros) length: <small>* must provide value</small>	3 digits 001 - 999, 1000, 1001, ...

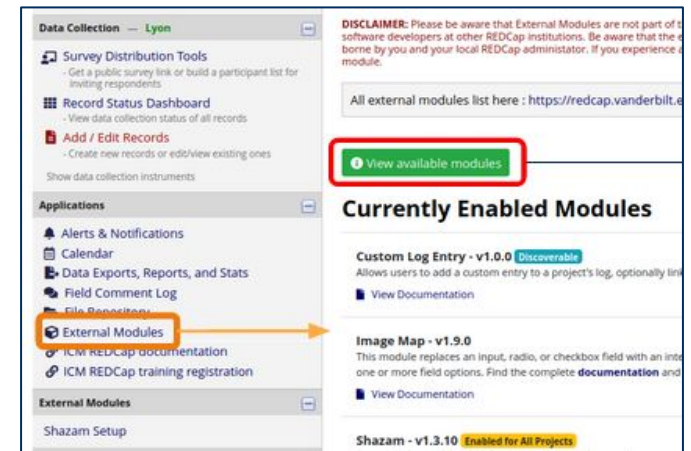
CancelSave

- Increment within DAG using part of D
- Integer increment from specified start value
 - Padded integer increment with prefix
 - Increment within DAG using part of DAG name
 - Date/time in selected format
 - Unix timestamp (16 digits)
 - A project-specific custom auto-numbering schema

Exercise

1. Activate the module :

- Custom Record Auto-numbering - v1.0.2



2. Create a custom ID : like "Training_001"

Form for creating a custom ID:

- Dropdown menu: Padded integer increment with prefix
- Text input field: Projectname_
- Dropdown menu: 3 digits 001 - 999, 1000, 1001, ...

3. Create a Patient with "Add New Record"

Identity Manager

Identifying data



IDENTITY MANAGER

Why ID Manager ?

Pseudonymised data

→ Only REDCap with Custom ID

Identifying data

→ REDCap + ID Manager

Identifying Data Starter kit :

1. Full Name
3. Phone number
4. E-mail address
5. Account numbers
6. Social Security number
7. Medical Record number
8. Health Plan number
9. Certificate/license numbers
10. URL
11. IP address
12. Vehicle identifiers
13. Device ID
14. Biometric ID
15. Full face/identifying photo
16. Other unique identifying number
17. Postal address
18. Date precision beyond year



First connection on ID Manager

ICM production



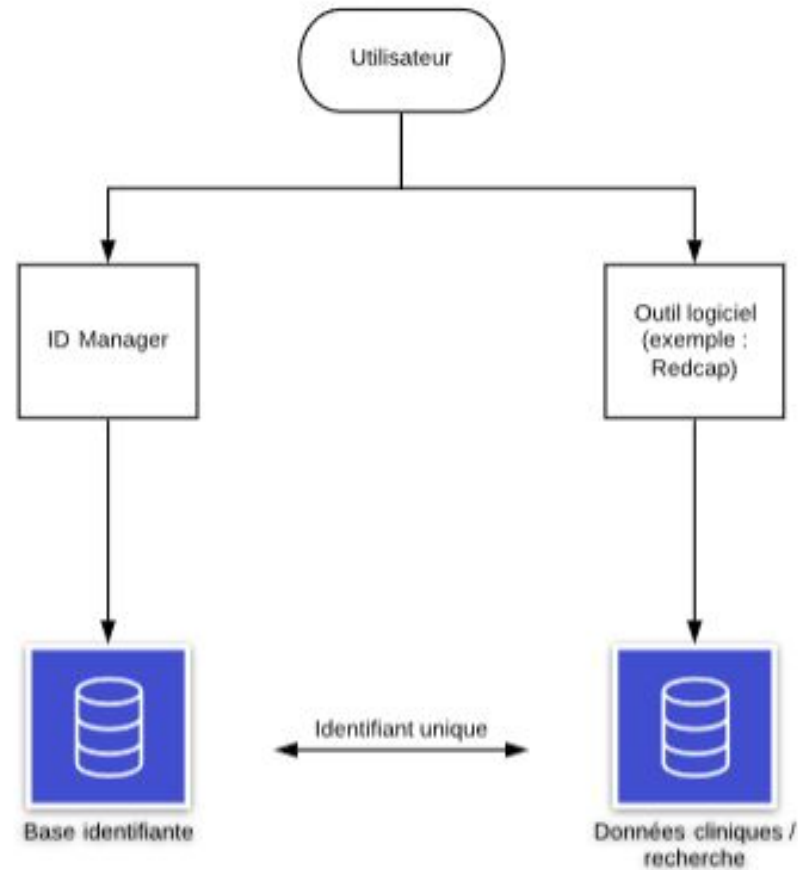
[https://**idmanager**.icm-institute.org/login](https://idmanager.icm-institute.org/login)

ICM tests



[https://**idmanager-staging**.icm-institute.org/login](https://idmanager-staging.icm-institute.org/login)

Version 1 Usage



Interested ?

Objective 2022 :

Integrate ID manager in REDCap (Already working on it).

Recherchez la personne afin de savoir si elle est déjà enregistrée :

Nb lignes 10 1-3 of 3 < >

Sexe	Prénom (Autres prénoms)	Nom (Nom d'usage)	Date de naissance	Protocole(s) Identifiant(s)	Actions
Inconnu/Autre	test	test	01/01/1950	Test-nspark test-0001	
Inconnu/Autre	test4	test4	29/07/2021		
Homme	Tes	TESTS	05/08/1971		

Une ou plusieurs personnes correspondent à cette recherche. Choisissez la bonne, ou bien ajoutez la si elle ne figure pas dans les résultats.

Contact : Clément Rousseau for more information.

clement.rousseau@icm-institute.org

Practice guidelines

To do !

Account

- ☐ [How to get help](#)
- ☐ [How to get an account](#)
- ☐ [Login in & Password issues](#)
- ☐ [REDCap Home page and tabs](#)

Design

- ☐ [Join or Create a project](#)
- ☐ [Create an instrument \(form\)](#)
- ☐ [Create a field \(text, date,...\)](#)
- ☐ [Branching logic](#)
- ☐ [Manage IDs](#)
- ☐ [IDManager by ICM](#)

Structure

- ☐ [Data entry & Dashboard](#)
- ☐ [Adding users & roles](#)
- ☐ [Longitudinal](#)
- ☐ [Surveys & Public Survey](#)
- ☐ [Dev vs Prod Status](#)

Other

- ☐ [Report](#)
- ☐ [Export \(Excel & CSV\)](#)
- ☐ [PDFs](#)
- ☐ [Good practices on data](#)
- ☐ [Conclusion](#)

Break time 10min & first questions !



00:04:34



CHERCHER, TROUVER, GUÉRIR, POUR VOUS & AVEC VOUS.

Basic Data Entry

Capturing and finding data



Create a record

REDCap®

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Log out

My Projects or Control Center
REDCap Messenger

Project Home and Design

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

Data Collection

Record Status Dashboard
View data collection status of all records

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

Show data collection instruments

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
Neuroinformatics

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Projet_test

Add / Edit Records

You may view an existing record/response by selecting it from the drop-down lists below. To create a new record/response, click the button below.

NOTICE: This project is currently in Development status. **Real data should NOT be entered** until the project has been moved to Production status.

Total records: **0**

Choose an existing Record ID

-- select record --

+ Add new record

Data Search

Choose a field to search
(excludes multiple choice fields)

All fields

Search query
Begin typing to search the project data, then click an item in the list to navigate to that record.

Select an existing patient

Create a new one

Select the field you want to search & / or
Select the value you want to search

Create a record

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[Log out](#)
[My Projects](#) or [Control Center](#)
[REDCap Messenger](#)

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

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](#)
- [ICM REDCap documentation](#)
- [ICM REDCap training registration](#)

Reports [Search](#) [Organize](#) [Edit](#)

ICM Paris Brain Institute

nspark_test

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.

Dashboard displayed: **[Default dashboard]**

Displaying Data Access Group: **-- ALL --**

Displaying record: **Page 1 of 375: "1" through "198"** of **37 466** records

Enter new record name **+ Create**

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

Record ID	Enrollment		Treatments	Visite				
	Identification	Patient	Traitements	Activite	Consultation Neuropsych Batteries	Echelles Mds Updrs Ldopa	Symptômes	Electrodes
1								
2								
4								
6								
8								
10								

Create a record

REDCap®

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Logout

My Projects or Control Center
REDCap Messenger

Project Home and Design

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

Data Collection

Record Status Dashboard
View data collection status of all records
Add / Edit Records
Create new records or edit/view existing ones

Record ID 1 [Select other record](#)

Data Collection Instruments:
My First Instrument

Lock all instruments

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Neuroinformatics

External Modules

Help & Information

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Projet_test

Actions: [Modify instrument](#) [Download PDF of instrument\(s\)](#) [VIDEO: Basic data entry](#)

My First Instrument

Data Access Group: [No Assignment] ?

Editing existing Record ID 1

Record ID 1
To rename the record, see the record action drop-down at top of the [Record Home Page](#).

Gender
* must provide value
☒ Male
☐ Female
reset

Form Status

Complete?

Lock this record for this form?
If locked, no user will be able to edit this record on this form until someone with Lock/Unlock privileges unlocks it.
☐ Lock

Save & Exit Form **Save & ...**
-- Cancel --

Delete data for THIS FORM only

NOTE: To delete the entire record (all forms/events), see the record action drop-down at top of the [Record Home Page](#).

The generated id

Exercise

1. Enter your first patient data

- Go in his first instrument
- All data are completed
- Complete status as “complete”
- Save & Exit

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

Total records: 0

Choose an existing Record ID	-- select record --
	+ Add new record

2. Enter a second patient

- Go in his first instrument
- All data are **NOT** completed
- Complete status as “Uncomplete”
- Save & Exit

Dashboard

Data Organization



Logged in as **mathias.antunes**
Log out

My Projects or Control Center
REDCap Messenger

Project Home and Design

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

Data Collection

Record Status Dashboard
- View data collection status of all records

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

Show data collection instruments

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Projet_test

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 Incomplete (no data saved) ?

Unverified

Complete

Dashboard displayed: [Default dashboard] [Create custom dashboard](#)

Displaying Data Access Group: -- ALL --

Displaying record: Page 1 of 1: "1" through "2" of 2 records ALL (2) records per page

[+ Add new record](#)

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

Record ID	My First Instrument
1	
2	

Each dot is an instrument

Record dashboard

REDCap®

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 Log out

My Projects or Control Center

View project as user: -- select a user --

Project Home and Design

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

Data Collection

Record Status Dashboard
 - View data collection status of all records

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

Study ID 1 [Select other record](#)

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

Longitudinal Database (1 arm)

PID 126

Record Home Page

The grid below displays the form-by-form progress of data entered for the currently selected record. You may click on the colored status icons to access that form/event. If you wish, you may modify the events below by navigating to the [Define My Events](#) page.

[Choose action for record](#)

Legend for status icons:

- ☒ Incomplete
 ☐ Incomplete (no data saved) ?
☐ Unverified
☒ Complete

Study ID 1

Data Collection Instrument	Enrollment	Dose 1	Visit 1	Dose 2	Visit 2	Dose 3	Visit 3	Final visit
Demographics	<input checked="" type="radio"/>							
Baseline Data	<input type="radio"/>							
Visit Lab Data			<input type="radio"/>		<input type="radio"/>		<input type="radio"/>	
Patient Morale Questionnaire		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Visit Blood Workup			<input type="radio"/>		<input type="radio"/>		<input type="radio"/>	<input type="radio"/>
Visit Observed Behavior			<input type="radio"/>		<input type="radio"/>		<input type="radio"/>	<input type="radio"/>
Completion Data								<input type="radio"/>
Completion Project Questionnaire								<input type="radio"/>
Delete all data on event:	<input checked="" type="radio"/>							

Advanced dashboard

REDCap®

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[Log out](#)

[My Projects](#) or [Control Center](#)
[REDCap Messenger](#)

Project Home and Design [-](#)

[Project Home](#) · [Project Setup](#)
[Designer](#) · [Dictionary](#) · [Codebook](#)
 Project status: **Development**

Data Collection [-](#)

Record Status Dashboard
 - View data collection status of all records
[Add / Edit Records](#)
 - Create new records or edit/view existing ones

Applications [-](#)

[Alerts & Notifications](#)
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[Data Import Tool](#)
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[Logging](#)
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[File Repository](#)
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[Data Quality](#)
[API and API Playground](#)
[REDCap Mobile App](#)
[External Modules](#)
[Neuroinformatics](#)

Project Bookmarks [Edit](#) [+](#)

Reports [Search](#) [Organize](#) [Edit](#) [-](#)

1) **Demographics**

External Modules [+](#)

Help & Information [+](#)

Longitudinal Database (1 arm)

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
- Incomplete (no data saved) [?](#)
- Unverified
- Complete

Dashboard displayed: [Default dashboard]

[Create custom dashboard](#)

Displaying record Page 1 of 1: "1" through "9" of 9 records

ALL (9) records per page

[+ Add new record](#)

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

Study ID	Enrollment		Dose 1	Visit 1				Dose 2	Visit 2				Dose 3	Visit 3				Final visit				
	Demographics	Baseline Data	Patient Morale Questionnaire	Visit Lab Data	Patient Morale Questionnaire	Visit Blood Workup	Visit Observed Behavior	Patient Morale Questionnaire	Visit Lab Data	Patient Morale Questionnaire	Visit Blood Workup	Visit Observed Behavior	Patient Morale Questionnaire	Visit Lab Data	Patient Morale Questionnaire	Visit Blood Workup	Visit Observed Behavior	Patient Morale Questionnaire	Visit Blood Workup	Visit Observed Behavior	Completion Data	Completion Project Questionnaire
1	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
2	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
3	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
4	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
5	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
6	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
7	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
8	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
9	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>

User management

Who access what ?



User management

Overview

REDCap®

Logged in as **mathias.antunes**
Log out

My Projects or Control Center
REDCap Messenger

Project Home and Design

- Project Home
- Project Setup
- Designer
- Dictionary
- Codebook
- Project status: Development

Data Collection

- Record Status Dashboard
- Add / Edit Records
- Show data collection instruments

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
- Neuroinformatics

External Modules

- Configure Email Alerts
- Custom Template Engine
- MyCap
- Search Dashboard
- Viz

Help & Information

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Projet_test

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

Project status: Development Completed steps 0 of 7

Main project settings

Not started

Enable Use surveys in this project? VIDEO: How to create and manage a survey

Enable Use longitudinal data collection with defined events?

I'm done! Modify project title, purpose, etc.

Design your data collection instruments

Not started

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 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](#)

Enable optional modules and customizations

Optional

I'm done!

Enable Repeatable instruments?

Disable Auto-numbering for records?

Enable Scheduling module (longitudinal only)?

Enable Randomization module?

Enable Designate an email field for sending survey invitations?

Additional customizations

Settings displayed to Administrators only:

Enable Dynamic Data Pull (DDP) from External Source System?

Enable Clinical Data Pull from EHR?

Enable Twilio SMS and Voice Call services for surveys and alerts?

Set up project bookmarks (optional)

You may create custom bookmarks to webpages that exist inside or outside of REDCap. These

Step 5

User Rights and Permissions

Optional

I'm done!

You may grant other users access to this project or edit the user privileges of current users on this project by navigating to the User Rights page. Additionally, if you wish to limit user access to certain records/responses for this project, you may want to use Data Access Groups, in which only users within a given Data Access Group can access records created by users within that group.

Go to [User Rights](#) or [Data Access Groups](#)

User management

Overview

The screenshot shows the REDCap User Management interface for a project named 'Projet_test'. The left sidebar contains navigation menus for 'Project Home and Design', 'Data Collection', 'Applications', and 'External Modules'. The 'User Rights and DAGs' option is highlighted in the 'Applications' menu. The main content area includes tabs for 'Project Home', 'Project Setup', 'User Rights', and 'Data Access Groups'. The 'User Rights' tab is active, displaying a form to 'Add new users' and 'Create new roles'. A callout box points to the 'Add new user' input field with the text: 'Add a user to the project Search by username (not email)'. Below the form is a table listing users and their privileges. A callout box points to the table with the text: 'All users with their rights'.

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

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

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	Data Export Tool	Reports & Report Builder	Graphical Data View & Stats	Calendar	Data Import Tool	Data Comparison Tool	Logging	File Repository	Record Locking Customization	Lock/Unlock Records	Data Quality (create/edit rules)
—	mathias.antunes (Mathias Antunes)	never	✗	✗	✗	De-identified	✓	✓	✓	✗	✗	✗	✓	✗	✗	✗
—	test.user (test user)	never	✓	✓	✓	Full Data Set	✓	✓	✓	✓	✓	✓	✓	✗	✓	✓

Access request



Log In



ICM Production Server

Access request

Need an account or a project? [Click here](#)

Please log in with your user name and password. If you are having trouble logging in, please contact [the ICM REDCap administrators](#).

Username:

Password:

Log In

[Forgot your password?](#)

! Only Admins

User management

Custom rights

Adding new user "test.user2"

You may set the rights for the user below by checking the boxes next to the application tools to which you wish to grant them access. You may also grant them or deny them access to individual data collection instruments, if so desired. To save your selections, click the "Add user" button at the bottom of the page.

Adding new user "test.user2"

Basic Rights

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

- Calendar ☒
- Data Import Tool ☐
- Data Comparison Tool ☐
- Logging ☐
- File Repository ☒
- Data Quality ☒ [What is Data Quality?](#) ☐ Create & edit rules ☐ Execute rules
- API ☐ [What is the REDCap API?](#) ☐ API Export ☐ API Import/Update

Settings pertaining to the REDCap Mobile App:

- REDCap Mobile App ☐ [What is the REDCap Mobile App?](#) ☐ Allows user to collect data offline in the mobile app

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
My First Instrument	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

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.

- ☐ Auto Populate Fields*
- ☐ Custom Template Engine*
- ☐ Email Alerts**
- ☐ Instance Table**
- ☐ Instant Field Concatenation*
- ☐ Language key 'emlang_redcap_ui_trimmer_module_nam...
- ☐ MyCap**
- ☐ Orca Search Module*
- ☐ REDCap CSS Injector*
- ☐ REDCap Entity API**
- ☐ Survey UI Tweaks*
- ☐ User Rights By Record*
- ☐ Vizr - Visualizer for temporal summary reporting**

*Permissions based on user's Project Design/Setup rights
**Module does not have project-level configuration options

New User Notification

☒ Notify user of their project access via email?

Add user **Cancel**

Expiration date

Create instrument,...

! Manage users

All type of export
(Full, De-Identified)

! Importing data tool

! API (Programming interface)

Data entry rights

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
Demographics	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Baseline Data	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Visit Lab Data	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Patient Morale Questionnaire	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Visit Blood Workup	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Visit Observed Behavior	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Completion Data	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Completion Project Questionnaire	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Best Practices

- Limit the access to personal data
- Give access to only what the user need



Only Admins

User management

Custom rights

Adding new user "test.user2"

☐ Full Data Set

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

☒ Stats & Charts

Other privileges:

☒ Calendar

☐ Data Import Tool

☐ Data Comparison Tool

☐ Logging

☒ File Repository

☐ Data Quality
[What is Data Quality?](#)

☐ Create & edit rules

☐ Execute rules

☐ API
[What is the REDCap API?](#)

☐ API Export

☐ API Import/Update

Settings pertaining to the REDCap Mobile App:

☐ REDCap Mobile App
[What is the REDCap Mobile App?](#)

☐ Allows user to collect data offline in the mobile app

☐ Allow user to download data for all records to the app?

Settings pertaining to project records: [Explain these settings](#)

☒ Create Records

☐ Rename Records

☐ Delete Records

Settings pertaining to record locking and E-signatures:

☐ Record Locking Customization

☒ Lock/Unlock Records

Users with locking privileges also have access to the E-signature and Locking Mgmt page on the left-hand Applications menu.

☐ Disabled

☐ Locking / Unlocking

☐ Locking / Unlocking with E-signature authority
[What is an E-signature?](#)

[Watch video about locking](#)

☐ Allow locking of all forms at once for a given record?

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.

☐ Auto Populate Fields*

☐ Custom Template Engine*

☐ Email Alerts**

☐ Fhir Ontology Autocomplete Module**

☐ Instance Table**

☐ Instant Field Concatenation*

☐ Language key 'emlang_redcap_ui_trimmer_module_nam...

☐ MyCap**

☐ Orca Search Module*

☐ Quick Permissions**

☐ REDCap CSS Injector*

☐ REDCap Entity API**

☐ Survey UI Tweaks*

☐ User Rights By Record*

☐ Viz - Visualizer for temporal summary reporting**

*Permissions based on user's Project Design/Setup rights
**Module does not have project-level configuration options

New User Notification

☒ Notify user of their project access via email?

Add user **Cancel**

Create a patient



Delete a patient

Best Practices

- Prevent data loss
- Limit to access to specific user

Exercise

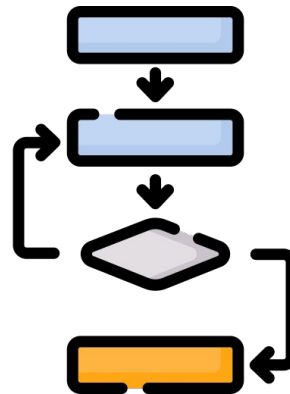
- Add test.user to your project
 - Limit access to data collection
- Create “Read only” role and add test.user to it
- Create “Admin” role and add test.user to it

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
Demographics	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Baseline Data	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Visit Lab Data	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Patient Morale Questionnaire	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Visit Blood Workup	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Visit Observed Behavior	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Completion Data	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Completion Project Questionnaire	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

 User Rights and  DAGs

Project type








Classic / Longitudinal







Project Type

Overview

























Classic

 Data Collection Instrument	Status
Demographics	
Baseline Data	
Month 1 Data	
Month 2 Data	
Month 3 Data	
Completion Data	


Main project settings

-  Use surveys in this project? 
-  Use longitudinal data collection with defined events? 

Longitudinal

 Data Collection Instrument	Enrollment	Dose 1	Visit 1	Dose 2	Visit 2	Dose 3	Visit 3	Final visit
Demographics								
Baseline Data								
Visit Lab Data								
Patient Morale Questionnaire								
Visit Blood Workup								
Visit Observed Behavior								
Completion Data								
Completion Project Questionnaire								
Delete all data on event:								

Main project settings

-  Use surveys in this project? 
-  Use longitudinal data collection with defined events? 

Project type

Longitudinal

REDCap

Logged in as mathias.antunes
Log out

My Projects or Control Center
REDCap Messenger

Project Home and Design

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

Data Collection

Record Status Dashboard
View data collection status of all records
Add / Edit Records
Create new records or edit/view existing ones

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
Neuroinformatics

Project Bookmarks Edit +

Reports Search Organize Edit -

1) Demographics

External Modules

Configure Email Alerts
Configure User Rights
Custom Template Engine
MyCap
Search Dashboard
Vizr

Help & Information

Longitudinal Database (1 arm)

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

Project status: Development Completed steps 0 of 8

Main project settings

Not started

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

Disable Use longitudinal data collection with defined events? [?] **1**

I'm done! Modify project title, purpose, etc.

Design your data collection instruments

Not started

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

Define your events and designate instruments for them

In progress

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

Go to Define My Events or Designate Instruments for My Events

Enable optional modules and customizations

Optional

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

I'm done! Additional customizations

Settings displayed to Administrators only:
Enable Dynamic Data Pull (DDP) from External Source System [?]
Enable Clinical Data Pull from EHR [?]
Enable Twilio SMS and Voice Call services for surveys and alerts [?]

Set up project bookmarks (optional)

In progress

You may create custom bookmarks to webpages that exist inside or outside of REDCap. These bookmarks will be seen as links on the left-hand project menu and can be accessed at any time by users who are given privileges to do so. Every project bookmark has custom settings that allow one to control its appearance and behavior.

Upload or download arms/events

Arm 1: Drug A +Add New Arm

Arm name: Drug A Rename Arm 1

	Event #	Event Name	Custom Event Label (optional)	Unique event name (auto-generated)
	1	Enrollment		enrollment_arm_1
	2	Dose 1		dose_1_arm_1
	3	Visit 1		visit_1_arm_1
	4	Dose 2		dose_2_arm_1
	5	Visit 2		visit_2_arm_1
	6	Dose 3		dose_3_arm_1
	7	Visit 3		visit_3_arm_1
	8	Final visit		final_visit_arm_1
Add new event				
Descriptive name for this event			Custom Event Label (optional) Example: [visit_date]. [weight] kg	

Project type

Longitudinal

REDCap

Logged in as **mathias.antunes**
 Log out
 My Projects or Control Center
 REDCap Messenger

Project Home and Design

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

Data Collection

Record Status Dashboard
 View data collection status of all records
 Add / Edit Records
 Create new records or edit/view existing ones

Applications

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 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
 Neuroinformatics

Project Bookmarks Edit +

Reports Search Organize Edit -

1) Demographics

External Modules

Configure Email Alerts
 Configure User Rights
 Custom Template Engine
 MyCap
 Search Dashboard
 Vizr

Help & Information

Longitudinal Database (1 arm)

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

Project status: Development Completed steps 0 of 8

Main project settings

Not started
 Enable Use surveys in this project? [?] VIDEO: How to create and manage a survey
 Disable Use longitudinal data collection with defined events? [?]
 I'm done! Modify project title, purpose, etc.

Design your data collection instruments

Not started
 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

Define your events and designate instruments for them

In progress
 Create events for re-using data collection instruments and/or set up scheduling.
 Go to Define My Events or Designate Instruments for My Events

Enable optional modules and customizations

Optional
 I'm done!
 Enable Repeating instruments and events [?]
 Disable Auto-numbering for records [?]
 Enable Scheduling module (longitudinal only) [?]
 Enable Randomization module [?]
 Enable Designate an email field for sending survey invitations [?]
 Additional customizations
 Settings displayed to Administrators only:
 Enable Dynamic Data Pull (DDP) from External Source System [?]
 Enable Clinical Data Pull from EHR [?]
 Enable Twilio SMS and Voice Call services for surveys and alerts [?]

Set up project bookmarks (optional)

In progress
 I'm done!
 You may create custom bookmarks to webpages that exist inside or outside of REDCap. These bookmarks will be seen as links on the left-hand project menu and can be accessed at any time by users who are given privileges to do so. Every project bookmark has custom settings that allow one to control its appearance and behavior.



Project Setup Define My Events Designate Instruments for My Events

Since you have defined multiple events on the [Define My Events](#) page, you may now select which data collection instruments that you wish to utilize for each event by using the table below. This allows you to enter data on any data collection form multiple times for any given project record. Any and all data collection instruments can thus be used for any event defined.

Click the [Begin Editing](#) button to change the relationships below by designating which forms you wish to utilize for which events. When you are finished making changes, click the [Save](#) button to finalize your changes.

[Upload or download instrument mappings](#)

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

Data Collection Instrument	Enrollment (1)	Dose 1 (2)	Visit 1 (3)	Dose 2 (4)	Visit 2 (5)	Dose 3 (6)	Visit 3 (7)	Final visit (8)
Demographics	✓							
Baseline Data	✓							
Visit Lab Data			✓		✓		✓	
Patient Morale Questionnaire		✓	✓	✓	✓	✓	✓	✓
Visit Blood Workup			✓		✓		✓	✓
Visit Observed Behavior			✓		✓		✓	✓
Completion Data								✓
Completion Project Questionnaire								✓

exercise : use a template

1. Create a new project with “**Longitudinal Database (1 arm)**” template

Data Collection Instrument	Enrollment	Dose 1	Visit 1	Dose 2	Visit 2	Dose 3	Visit 3	Final visit
Demographics								
Baseline Data								
Visit Lab Data								
Patient Morale Questionnaire								
Visit Blood Workup								
Visit Observed Behavior								
Completion Data								
Completion Project Questionnaire								

2. See Activated Longitudinal study

- Check how Events are defined and change it

☒ 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 or

Data Collection Instrument	Enrollment (1)	Dose 1 (2)	Visit 1 (3)	Dose 2 (4)	Visit 2 (5)	Dose 3 (6)	Visit 3 (7)	Final visit (8)
Demographics								
Baseline Data								
Visit Lab Data								
Patient Morale Questionnaire								
Visit Blood Workup								
Visit Observed Behavior								
Completion Data								
Completion Project Questionnaire								

3. Create a record & Visualize in the Dashboard and in Patient Dashboard

Surveys

Easy-to-use data collection



Project type

What is a Survey ?

Patient Morale Questionnaire

Invitation status: Survey options

Editing existing Study ID 1

Event Name: **Dose 1**

Study ID 1

On average, how many pills did you take each day last week?

Using the handout, which level of dependence do you feel you are currently at?

Would you be willing to discuss your experiences with a psychiatrist? ☐ No ☐ Yes reset

How open are you to further testing?

Form Status

Complete?

Lock this record for this form?

If locked, no user will be able to edit this record on this form until someone with Lock/Unlock privileges unlocks it. ☐ Lock

Save & Exit Form Save & ...

-- Cancel --

Patient Morale Questionnaire

Resize font:

Please complete the survey below.

Thank you!

- 1) On average, how many pills did you take each day last week?
- 2) Using the handout, which level of dependence do you feel you are currently at?
- 3) Would you be willing to discuss your experiences with a psychiatrist? ☐ No ☐ Yes reset
- 4) How open are you to further testing?

Submit

Powered by REDCap

Project type

Public Surveys vs Surveys

■ Public Surveys

- A **unique link** for all
- Recruiting at large scale
- Anonymous answers

■ Classic survey

- **Custom** links
- Individual patient follow
- Mass email re-contact

Project type

Public Surveys

■ 1st instrument in survey mode

Disable ☒ Use surveys in this project? ?

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	25		<input checked="" type="checkbox"/>	Choose action	Survey settings Automated Invitations

Here

Public Surveys

The unique link

REDCap

Logged in as **mathias.antunes**
 Log out
 My Projects or Control Center
 REDCap Messenger

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

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
 Randomization
 Data Quality
 API and API Playground
 REDCap Mobile App
 External Modules
 ICM REDCap documentation
 ICM REDCap training registration

Paris Brain Institute
 ICM Paris Brain Institute

Longitudinal Database (1 arm) (PLUGIN Testing pre-prod)

Survey Distribution Tools

Public Survey Link · Participant List · Survey Invitation Log

Using a public survey link is the simplest and fastest way to collect responses for your survey. You may obtain the survey link below to email it to your participants. Responses will be collected anonymously (unless the survey contains questions asking for identifying data from the participant). **NOTE:** Since this method uses a single survey link for all participants, it allows for the possibility of participants taking the survey multiple times, which may be necessary in some cases.

To obtain the survey link, copy the URL below and paste it into the body of an email message in your own email client. Your email recipient(s) can then click the link to begin taking your survey.

Public Survey URL: <https://redcap-icm.icm-institute.org/surveys/?s=MCK38K9D8P>

Link Actions

Open public survey
 Open public survey + Log out
 Send me URL via email
 Survey Access Code or QR Code

Link Customizations

Get Short Survey Link
 Create Custom Survey Link
 Get Embed Code

NOTICE TO ADMINISTRATOR: The Google reCAPTCHA feature for protecting public surveys is currently DISABLED at the system-level for all projects, but if you wish, you may enable the option on the [Modules/Services Configuration](#) page in the Control Center. This option will allow users to add protection to their public survey using Google's reCAPTCHA functionality, which can prevent bots from entering trash data into a public survey.

Here

Project type

Custom Surveys

Disable ☒ Use surveys in this project? ?

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	25		Enable	Choose action ▾	
Baseline Data	8		Enable	Choose action ▾	
Visit Lab Data	5		Enable	Choose action ▾	
Patient Morale Questionnaire	4			Choose action ▾	Survey settings + Automated Invitations
Visit Blood Workup	9		Enable	Choose action ▾	
Visit Observed Behavior	14		Enable	Choose action ▾	
Completion Data	12		Enable	Choose action ▾	
Completion Project Questionnaire	13		Enable	Choose action ▾	

Enable it per instrument

Then, access the settings

Project type

Surveys



Patient Morale Questionnaire

Invitation status: **Survey options**

Editing existing Study ID 1

Event Name: **Dose 1**

Study ID: 1

On average, how many pills did you take each day last week?

Using the handout, which level of dependence do you feel you are currently at?

Would you be willing to discuss your experiences with a psychiatrist? ☐ No ☐ Yes reset

How open are you to further testing?

Form Status

Complete?

Lock this record for this form? ☐ **Lock**
If locked, no user will be able to edit this record on this form until someone with Lock/Unlock privileges unlocks it.

Save & Exit Form **Save & ...**

-- Cancel --

Patient Morale Questionnaire Resize font:

Please complete the survey below.

Thank you!

1) On average, how many pills did you take each day last week?

2) Using the handout, which level of dependence do you feel you are currently at?

3) Would you be willing to discuss your experiences with a psychiatrist? ☐ No ☐ Yes reset

4) How open are you to further testing?

Submit

Powered by REDCap

Project type

Public Surveys vs Surveys

■ Public Surveys

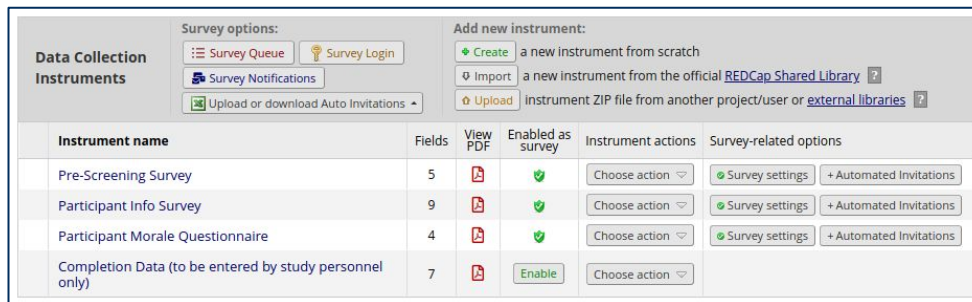
- A **unique link** for all
- Recruiting at large scale
- Anonyme answers

■ Classic survey

- **Custom** links
- Individual patient follow
- Mass email re-contact

Exercise

1. Create a **new project** with **Multiple Surveys (classic) template**
2. Visualize the surveys instruments

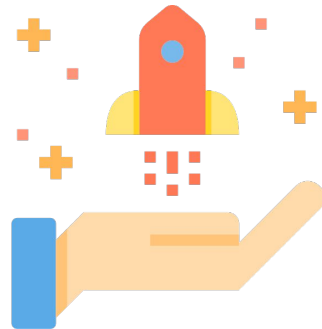


Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Pre-Screening Survey	5			Choose action ▾	Survey settings + Automated Invitations
Participant Info Survey	9			Choose action ▾	Survey settings + Automated Invitations
Participant Morale Questionnaire	4			Choose action ▾	Survey settings + Automated Invitations
Completion Data (to be entered by study personnel only)	7		Enable	Choose action ▾	

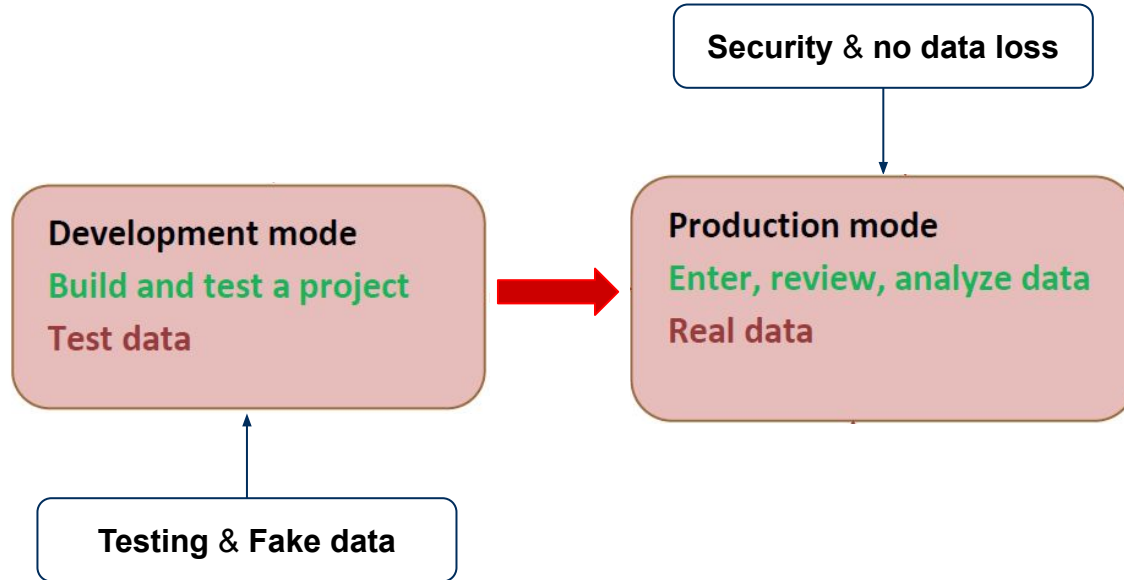
3. Complete **Participant Info Survey** using the **Survey Public link**
4. Visualize in the Dashboard

Production

Launching the project



Going into production



Going into production

REDCap®

Logged in as **mathias.antunes**
 Log out
 My Projects or Control Center
 REDCap Messenger

Project Home and Design

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

Data Collection

Record Status Dashboard
 - View data collection status of all records
 Add / Edit Records
 - Create new records or edit/view existing ones
 Show data collection instruments

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
 Neuroinformatics

External Modules
 Help & Information

ICM | Brain & Spine Institute
 Institut du Cerveau et de la Moelle épinière Inserm Cnrs Umr

Projet_test

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

Project status: Development Completed steps 6 of 7

Main project settings

Complete! Enable Use surveys in this project? VIDEO: How to create and manage a survey
 Enable Use longitudinal data collection with defined events?
 Not complete? Modify project title, purpose, etc.

Design your data collection instruments

Complete! 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
 Not complete? 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

Enable optional modules and customizations

Complete! Enable Repeatable instruments
 Disable Auto-numbering for records
 Enable Scheduling module (longitudinal only)
 Enable Randomization module
 Enable Designate an email field for sending survey invitations
 Not complete? Additional customizations
 Settings displayed to Administrators only:
 Enable Dynamic Data Pull (DDP) from External Source System
 Enable Clinical Data Pull from EHR
 Enable Twilio SMS and Voice Call services for surveys and alerts


Set up project bookmarks (optional)

Complete! You may create custom bookmarks to webpages that exist inside or outside of REDCap. These bookmarks will be seen as links on the left-hand project menu and can be accessed at any time by users who are given privileges to do so. Every project bookmark has custom settings that allow one to control its appearance and behavior.
 Not complete? Go to Add or edit bookmarks

Scroll down

Going into production


Go to [Add or edit bookmarks](#)

 **Complete!**
[Not complete?](#)

User Rights and Permissions


You may grant other users access to this project or edit the user privileges of current users on this project by navigating to the User Rights page. Additionally, if you wish to limit user access to certain records/responses for this project, you may want to use Data Access Groups, in which only users within a given Data Access Group can access records created by users within that group.

Go to [User Rights](#) or [Data Access Groups](#)

 **Complete!**
[Not complete?](#)

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.

 **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](#)

Last step

Going into production

Passer le projet au statut de production? ✕

Voulez-vous vraiment quitter l'étape de développement ? Si vous poursuivez, le projet obtiendra le statut de PRODUCTION afin que les données réelles puissent être collectées. Si vous sélectionnez l'option ci-dessous 'Supprimer toutes les données', toutes les données recueillies, les événements du calendrier et les documents importés sont supprimés, sinon le projet demeure inchangé lors de son transfert vers la production.

★ Avez-vous vérifié la page [Données identifiantes](#) pour vous assurer que tous les champs identifiants ont été marqués ?

Conserver les données existantes ou les supprimer ?

- ☐ Conserver TOUTES les données enregistrées jusqu'à présent. **(7 enregistrements)**
- ☐ Supprimer TOUTES les données, les événements du calendrier, les documents téléchargés pour enregistrements/réponses, les réponses aux enquêtes (le cas échéant), les instantanés du dictionnaire de données et les événements d'enregistrement liés à la collecte de données.

Une fois en production, vous ne serez plus en mesure de modifier les champs du projet en temps réel. Cependant, vous pouvez faire des modifications en mode brouillon qui pourront être approuvées automatiquement ou soumises à l'approbation d'un administrateur REDCap avant de prendre effet.

OUI, passer au statut de production

Annuler

1. Move 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](#)

What changed

- ✓ Can **not** rename variables unique name (variable_name)
- ✓ Can only modify the project with the **Draft Mode**
- ✓ Will **warn** you if a modification might cause data loss
- ✓ Multiple **protection** against data loss

Production status

Draft Mode

The screenshot shows the REDCap interface for a project named 'Projet_test'. The user is logged in as 'mathias.antunes'. The project status is 'Production'. The 'Designer' tab is highlighted in the left sidebar. A yellow box contains a note about the production status and a button to 'Enter Draft Mode'.

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](#)

[Share your instruments with others via the REDCap Shared Library](#) [VIDEO: How to use this page](#)

The Online Designer will allow you to make project modifications to fields and data collection instruments very easily using only your web browser. In order to make any modifications to your instruments listed below, you must first move the project into Draft Mode by clicking the 'Enter Draft Mode' button above.

Data Collection Instruments			
Instrument name	Fields	View PDF	Instrument actions
My First Instrument	10		Choose action
Bad fields	2		Choose action

Production status

Draft Mode

The screenshot shows the REDCap interface for a project named 'Projet_test'. The left sidebar contains navigation links for Project Home and Design, Data Collection, and Applications. The main content area shows the project status as 'Production' and a yellow warning box indicating that changes will not be made in real time. A 'Submit Changes for Review' button is highlighted with a red box. Below the warning box, there are links to 'Remove all drafted changes' and 'View detailed summary of all drafted changes'. The bottom section shows the 'Data Collection Instruments' table with two instruments: 'My First Instrument' and 'Bad fields'.

REDCap
Logged in as **mathias.antunes**
Log out
My Projects or Control Center
REDCap Messenger

Project Home and Design
Project Home · Project Setup
Designer · Dictionary · Codebook
Project status: **Production**

Data Collection
Record Status Dashboard
Add / Edit Records
Show data collection instruments

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
Neuroinformatics

External Modules
Help & Information

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Projet_test

Project Home Project Setup Online Designer Data Dictionary Codebook

Since this project is currently in **PRODUCTION**, changes will not be made in real time. [Tell me more](#)

Submit Changes for Review

Fields to be added: 0 / Total resulting field count: 14
Fields to be deleted: 0 / Existing field count: 14

[Remove all drafted changes](#) [View detailed summary of all drafted changes](#)

Create snapshot of instruments VIDEO: How to use this page
Last snapshot: 09/12/2019 14:34

The Online Designer will allow you to make project modifications to fields and data collection instruments very easily using only your web browser. Below you have the options to modify an existing instrument, delete an instrument, create a new instrument, download an instrument as a PDF document, or reorder your instruments.

Data Collection Instruments

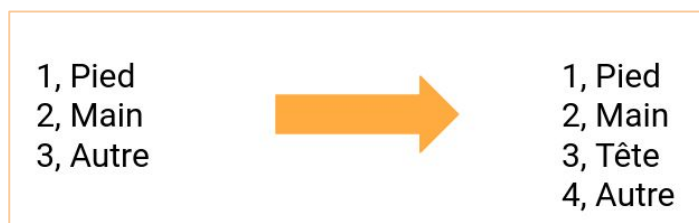
Add new instrument:
Create a new instrument from scratch
Import a new instrument from the official REDCap Shared Library
Upload Instrument ZIP file from another project/user or external libraries

Instrument name	Fields	View PDF	Instrument actions
My First Instrument	10		Choose action
Bad fields	2		Choose action

Production status

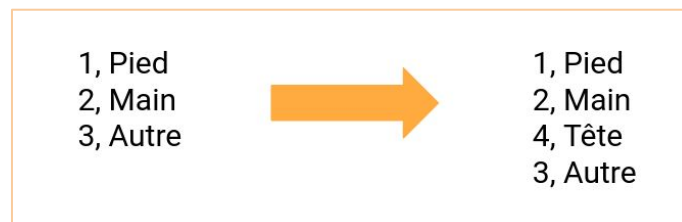
Data protection example

→ Modifying a list



All data entered with "3, Autre", now are "3,Tête"

REDCap will alert you and the modification will have to be reviewed to avoid data loss



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

Project Status Management

Development → **Production (current)** → **Analysis/Cleanup**

Move to Analysis/Cleanup status →

Move the project to Analysis/Cleanup status if data collection is complete. This will disable most project functionality, although all collected data will remain intact. Once in Analysis/Cleanup status, the project can be moved back to production status at any time.

← Move back to Development status

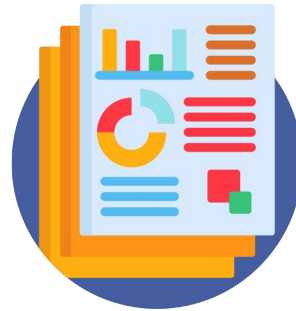
Moved to production too soon? You may move the project back to development status, if needed. **⚠ NOTE:** Since the project is currently in Draft Mode, all drafted changes will be discarded when moving back to development. So if you do not want to lose the current drafted changes, then first finish making changes to then fields in Draft Mode and then have them submitted for approval before continuing [here](#). **(Administrators Only)**

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](#)

Report

Data Slicing



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Log out

My Projects or Control Center
REDCap Messenger

Project Home and Design

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

Data Collection

Record Status Dashboard
- View data collection status of all records

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

Show data collection instruments

Applications

Alerts & Notifications
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Data Exports, Reports, and Stats
Data Import Tool
Data Comparison Tool
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Customize & Manage Locking/E-signatures
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Neuroinformatics

External Modules

Help & Information

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Projet_test

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	All data (all records and fields)	View Report Export Data Stats & Charts		
B	Selected instruments (all records)	Make custom selections		
	+ Create New Report			

Create a new report

Create a report

1/2

Report Name

Name of Report:	<input type="text"/>
Description (optional): <small>Displayed on page below report name</small>	<input type="text"/> <small>HTML may be used in order to add links or to add style to text.</small>

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)

Who can see and edit the report

Variables you want to report

STEP 2

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

Field 1	<input id""="" study="" type="text" value="study_id "/>	<input type="button" value="v"/>	Instrument: Demographics	<input checked="" type="button" value="x"/>
Field 2	<input type="text" value="Type variable name or field label"/>	<input type="button" value="v"/>	Instrument:	


Additional report options (optional)

☐ 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)

Best Practices

- Only filter with **simple filters**
- Use it to **prefilter** before exporting

 Show all repetition & event for record match

STEP 3

☒ Show data for all events for each record returned [?](#) [How to use filters and AND/OR logic](#)

Filters (optional)

Filter	Operator / Value
Filter 1 <input type="text" value="Type variable name or field label"/> in <input type="text" value="All events"/>	= <input type="text"/>

Switch format: [Use advanced logic](#)

Additional Filters (optional) (Records belonging only to ALL selections below will appear in the report)

Filter by event(s):
☐ Enrollment
☐ Dose 1
☐ Visit 1
☐ Dose 2
☐ Visit 2

 Filters

Best Practices

If you want **only a specific data**, uncheck this.

Create a report

2/2

Additional Filters (optional) (Records belonging only to ALL selections below will appear in the report)

Filter by event(s):
Enrollment
Dose 1
Visit 1
Dose 2
Visit 2

Live Filters (optional) Live Filters can be selected on the report page for dynamically filtering data in real time. With the exception of the Record ID field, only multiple choice fields can be used as Live Filters (as well as Events, if longitudinal, and Data Access Groups, if any exist).

Live Filter 1	-- select a field --
Live Filter 2	-- select a field --
Live Filter 3	-- select a field --

STEP 4

Order the Results (optional)

First by	study_id "Study ID"	RBL	Ascending order
Then by	Type variable name or field label		Ascending order
Then by	Type variable name or field label		Ascending order

Save Report [Cancel](#)

Live filter you will be able to apply to your report on the next step

Best Practices

- Use **live filters** to not modify the report every time
- You can not filter on **free text**

Best Practices

- This is **not a statistical tool**
- This tool is meant to help you **track the completion of your data**
- You can only apply **simple filter**

See a report

Number of results

Live filter

If you can't scroll on the page

Number of results returned: **14**
 Total number of records queried: 86
 (records = total available data across all designated events)
 Report execution time: 0 seconds

Stats & Charts Export Data Print Page Edit Report

Live filters: [Gender] v

my report

Search Table not displaying properly

Study ID study_id	Event Name redcap_event_name	Repeat Instrument redcap_repeat_instrument	Repeat Instance redcap_repeat_instance	Date subject signed consent date_enrolled	Gender sex	Upload the patient's consent form patient_document	First Name first_name	Last Name last_name	Street, City, State, ZIP address	E-mail email	Phone number telephone_1	Height (cm) height2	Weight (kilograms) weight2	Date of birth dob	Serum Prealbumin (mg/dL) vid1	Age (years) age	Ethnicity ethnicity	Race race	Has the patient given birth before? given_birth	How many times has the patient given birth? num_children	Gym (Weight Training)	
																					Monday gym__0	Tuesday gym__1
1	Enrollment			2019-10-02	Male (1)		Mathi	Antunes		mathias.antunes@icm-institute.org				1996-01-01		25	Hispanic or Latino (0)	Unknown / Not Reported (6)			Checked (1)	Unchecked (0)
1	Enrollment	Baseline Data	1									2	50									
1	Enrollment	Baseline Data	2									1										
2	Enrollment			2119-11-12	Male (1)		Mathi	Antunes		mathias.antunes@icm-institute.org				1996-11-11		24	NOT Hispanic or Latino (1)	Unknown / Not Reported (6)			Checked (1)	Checked (1)
3	Enrollment			2119-11-12	Male (1)		Mathi	Antunes		mathias.antunes@icm-institute.org				1996-11-11		24	NOT Hispanic or Latino (1)	Unknown / Not Reported (6)			Checked (1)	Checked (1)
3	Enrollment	Baseline Data	1									12										
4	Enrollment			2019-10-02	Male (1)		Mathi	Antunes		mathias.antunes@icm-institute.org				1996-01-01		25	Hispanic or Latino (0)	Unknown / Not Reported (6)			Checked (1)	Unchecked (0)
5	Enrollment			2119-11-12	Male (1)		Mathi	Antunes		mathias.antunes@icm-institute.org				1996-11-11		24	NOT Hispanic or Latino (1)	Unknown / Not Reported (6)			Checked (1)	Checked (1)
6	Enrollment			2119-11-12	Male (1)		Mathi	Antunes		mathias.antunes@icm-institute.org				1996-11-11		24	NOT Hispanic or Latino (1)	Unknown / Not Reported (6)			Checked (1)	Checked (1)
7	Enrollment			2019-10-02	Male (1)		Mathi	Antunes		mathias.antunes@icm-institute.org				1996-01-01		25	Hispanic or Latino (0)	Unknown / Not Reported (6)			Checked (1)	Unchecked (0)

Limit of a report

- ❑ They are made to help you track your data

"I want to see all my patient who are men"

"I want to see all patient with a missing data of birth"

- ❑ They **can't** answer complex questions

- ❑ BUT they can start the work for complex questions

→ *You can already select all patient with specific parameters*

Exercise

1. Create a report. (In a project with data)

- Add 4 variables of your choice containing data

STEP 2

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

Field 1	<input id"="" study="" type="text" value="study_id "/>	<input type="button" value="v"/>	Instrument: Demographics	<input type="button" value="x"/>
Field 2	<input conse"="" date="" signed="" subject="" type="text" value="date_enrolled "/>	<input type="button" value="v"/>	Instrument: Demographics	<input type="button" value="x"/>
Field 3	<input gender"="" type="text" value="sex "/>	<input type="button" value="v"/>	Instrument: Demographics	<input type="button" value="x"/>

2. Test live filtering

Live Filters (optional) Live Filters can be selected on the report page for dynamically filtering data in real time. With the exception of the Record ID field, only multiple choice fields can be used as Live Filters (as well as Events, if longitudinal, and Data Access Groups, if any exist).

Live Filter 1	<input type="text" value="-- select a field --"/>
Live Filter 2	<input type="text" value="-- select a field --"/>
Live Filter 3	<input type="text" value="-- select a field --"/>

Live filters:

- [Gender]
- Female
- Male
- (blank value)


ent Upload t

Export

CSV



Export and report



Logged in as **mathias.antunes**
Log out

My Projects or Control Center
REDCap Messenger

Project Home and Design

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

Data Collection

Record Status Dashboard
- View data collection status of all records


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

Show data collection instruments

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
Neuroinformatics

External Modules
Help & Information



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Projet_test

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				

Export all

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?](#)

[Deselect all options](#)

Advanced data formatting options

Set CSV delimiter character

Set the delimiter used to separate values in the CSV data file (only valid for CSV Raw Data and CSV Labels export formats):

; (semi-colon)

Force all numbers into a specified decimal format?

You may choose to force all data values containing a decimal to have a specified decimal character (comma or period/full stop). This will be applied to all calculations and number-validated text values in the export file.

Use fields' native decimal format (default)

NOTE: Your data formatting selections above will be remembered in the future and will be pre-selected upon your next export.

Change the CSV delimiter to ;



Export Data

Cancel



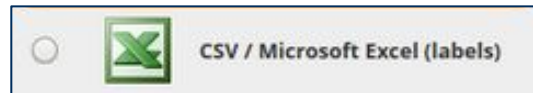
For Excel

- Delimiter -> ;
- Decimal -> .

What to export in the End Export ?

- For you just to see your data


✓ CSV / Excel : Label



- For the statistician or data processing

✓ CSV : Raw data

✓ Data Dictionnary (To be able to understand raw data)

1.) [Download the current Data Dictionary](#)  - Also download with other delimiters: [Tab](#) [Semicolon \(;\)](#)



1. Export all your data from **Data for export exercise**

My Reports & Exports				
	Report name	View/Export Options	Management Options	Report ID [?] (auto-generated)
A	All data (all records and fields)	View Report Export Data Stats & Charts		

2. Open the CSV with **Libreoffice** or **Excel** (Data, Convert, Delimiter)

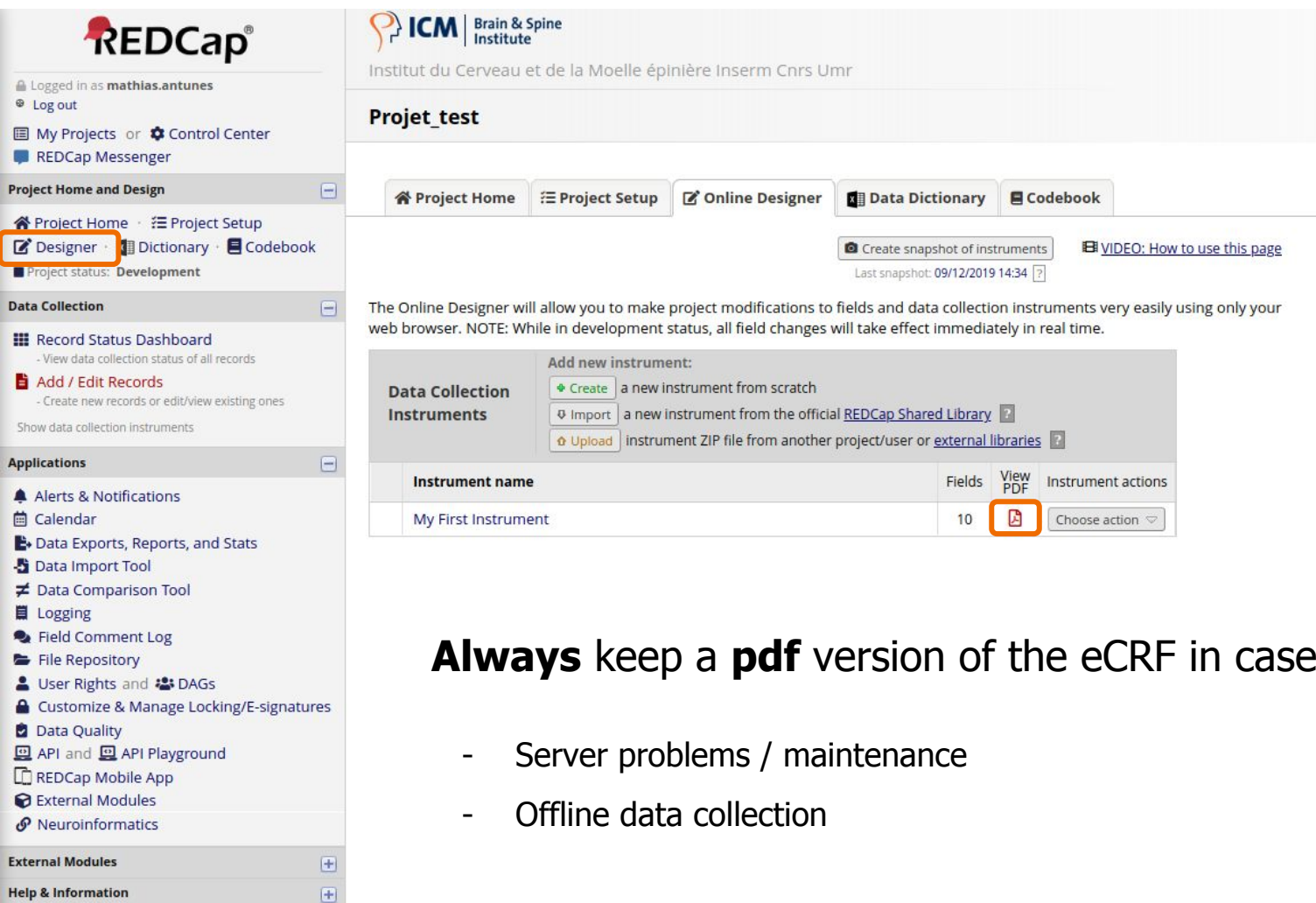


PDF

pdf generation



Empty CRF Pdf



The screenshot shows the REDCap interface for a project named 'Projet_test'. The left sidebar contains navigation menus for 'Project Home and Design', 'Data Collection', and 'Applications'. The 'Designer' option is highlighted in the 'Project Home and Design' menu. The main content area shows the 'Online Designer' tool, which allows users to create or modify data collection instruments. A table lists the instruments, with the first instrument 'My First Instrument' having 10 fields. The 'View PDF' button for this instrument is highlighted with an orange box.

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 Logged in as **mathias.antunes**
 Log out
 My Projects or Control Center
 REDcap Messenger

Project Home and Design

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

Project status: Development

Data Collection

- Record Status Dashboard
- View data collection status of all records
- Add / Edit Records**
- Create new records or edit/view existing ones

Show data collection instruments

Applications

- Alerts & Notifications
- Calendar
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- Field Comment Log
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External Modules

Help & Information

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Projet_test

Project Home Project Setup Online Designer Data Dictionary Codebook


Create snapshot of instruments VIDEO: How to use this page
 Last snapshot: 09/12/2019 14:34

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

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	Instrument actions
My First Instrument	10		Choose action

Always keep a **pdf** version of the eCRF in case of :

- Server problems / maintenance
- Offline data collection

Data eCRF Pdf

The screenshot displays the REDCap web interface. On the left, the sidebar shows the user is logged in as 'mathias.antunes' and lists various project tools. The main area is titled 'Projet_test' and shows a form for 'My First Instrument'. A dropdown menu is open under the 'Actions' tab, highlighting the 'Download PDF of instrument(s)' option. The dropdown lists several options: 'This data entry form (blank)', 'This data entry form with saved data', 'This data entry form with saved data (compact)', 'All data entry forms (blank)', 'All data entry forms with saved data', and 'All data entry forms with saved data (compact)'. An arrow points from the 'compact' option to the text 'Best PDF' on the right. The form itself includes fields for 'Record ID', 'Text', 'date' (set to 25-06-2020), 'note', 'Drop down', and 'Radio button'.

REDCap®

Logged in as **mathias.antunes**
Log out

My Projects or Control Center
REDCap Messenger

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

Record ID 1
Data Collection Instruments: Select other record

My First Instrument

Bad fields

Lock all instruments

Applications

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Data Comparison Tool
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Field Comment Log

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Search, find, cure, for you, with you
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Projet_test

Actions: Modify instrument Download PDF of instrument(s) VIDEO: Basic data entry

My First Instrument

Editing existing Record ID 1

Record ID

Text

date 25-06-2020 Today D-M-Y

note

Drop down

Radio button 1 2 3 reset

Data Access Group: [No Assignment] ?

Best PDF

Full patient Data eCRF Pdf

Best PDF

Choose action for record ▾

- Download PDF of record data for all instruments/events
- Download PDF of record data for all instruments/events (compact)
- Lock all instruments across all events
- Unlock all instruments across all events
- Rename record
- Delete record (all forms/events)

				Dose 2	Visit 2	Dose 3	Visit 3	Final visit
Patient Morale Questionnaire (survey)								
Visit Blood Workup								
Visit Observed Behavior								
Completion Data								
Completion Project Questionnaire								
Delete all data on event:	x	x	x	x	x	x	x	x

Practice guidelines

Done !

Account

- ✓ [How to get help](#)
- ✓ [How to get an account](#)
- ✓ [Login in & Password issues](#)
- ✓ [REDCap Home page and tabs](#)

Design

- ✓ [Join or Create a project](#)
- ✓ [Create an instrument \(form\)](#)
- ✓ [Create a field \(text, date,...\)](#)
- ✓ [Branching logic](#)
- ✓ [Manage IDs](#)
- ✓ [IDManager by ICM](#)

Structure

- ✓ [Data entry & Dashboard](#)
- ✓ [Adding users & roles](#)
- ✓ [Longitudinal](#)
- ✓ [Surveys & Public Survey](#)
- ✓ [Dev vs Prod Status](#)

Other

- ✓ [Report](#)
- ✓ [Export \(Excel & CSV\)](#)
- ✓ [PDFs](#)
- ✓ [Good practices on data](#)
- ✓ [Conclusion](#)

Good practices on data

- **Protocol** determines what data should be collected on the CRF.
- **Data not needed should not be collected**: allow for efficient and complete data processing, analysis and reporting.
- **Avoid duplication**: do not record the same information into multiple variables for the same event: e.g. DOB and age.
- Provide **instructions** to reduce misinterpretations.
- Be **clear** and concise with data questions.
- Provide **units** to ensure comparable values.
- Request **minimal free text** responses: provide predefined “choices”.
- Use “None” and “Not done” to help **tracking missing data**.
- Determine if data are **collected once or multiple times** during the project.
- Determine **how data will be collected**: manual key entry, imported from Excel, imported from another study.
- Determine **who will enter data**: patients, nurses, study staff, etc.

DAC Data Management Services

- Revu d'eCRF REDCap en développement (Variables, intégrité des données,...)
- Création d'un eCRF à partir d'un CRF papier
- Création de queries à partir d'un DVP
- Exécution de queries et génération d'un rapport
- Revu d'un eCRF en production avec les données saisies
- Rédaction/Revue d'un DMP
- Recherche/Intégration de fonctionnalités spécifiques
- etc

Thank you !

Any **questions** ?

Advanced training teaser

* *New features*

Design

- Account manager
- Piping
- Smart variables
- Advanced Calculated Fields
- Advanced Branching logic
- Action Tags*
- Field embedding*

Structure

- Longitudinal & Events
- Repetitions
- Surveys

CSV

- CSV* & Data Dictionary
- Export
- Importing Data

Other

- Alerts and Notifications
- Data Access Groups
- Data quality
- Export Data Quality*
- External modules
- Conclusion

ALL the slides :

<https://owncloud.icm-institute.org/index.php/s/214kbeyMEFohgA5>

Training schedule is available for ICM people here :

<https://neuroinformatics.icm-institute.org/training-program/>