

REDCap training





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- *Data Manager*
- *REDCap Referent*










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Find us here : <https://dac.institutduncerveau-icm.org/>

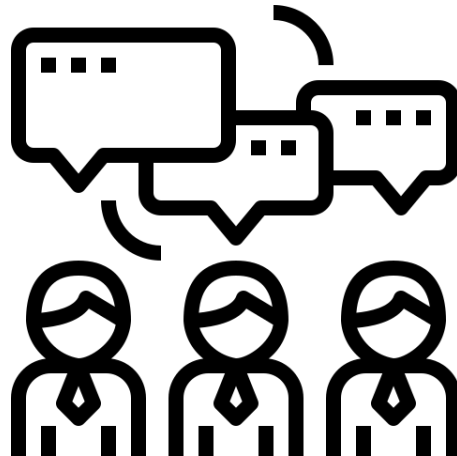
Our scientific data ecosystem

		 			
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/

- Review of REDCap eCRF under development
- Data Export / Transform / Import (ETL)
- Creation of an eCRF from a paper CRF
- Creation of queries from a DVP
- Execution of queries and generation of a report
- Review of an eCRF in production with the data entered
- Drafting/Reviewing a DMP
- Drafting/Reviewing a DVP
- Research/Integration of specific functionalities

Introduce yourselves !

Hi !



Votre vote wooclap s'affichera ici



Installez l'extension
Chrome ou **Firefox**



Assurez-vous d'être en
mode présentation

wooclap

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



Important terms

REDCap vocabulary

Project type	There are several types of projects depending on need: single survey form or data entry form, combination of a single survey / data entry form, longitudinal project, etc.
Field (or variable) “Champs”	Represent unique items of data to be collected and analyzed.
Record label “Label”	Information displayed on the screen about the variables. This is usually a sentence or a question prompting the entry of the data. For example, for the variable patient_age, you can write "What is the age of the patient?", Or "age of the patient", etc. This variable will have no impact on the database and may contain whatever you want (long question, color, bold, etc.).
Branching logic	Branching Logic may be employed when fields/questions need to be hidden for data entry under certain conditions.
Instrument	Survey page or data entry form.
Events “Evènement”	Allows for the utilization of data collection forms multiple times for any given project record (often used when collecting longitudinal data). An 'event' may be a temporal event in the course of a project, such as a participant visit or a task to be performed.
Arms “Bras”	Group of events into 'arms'; there may be one or more arms/groups per project. Each arm can have as many events as needed.

Study ID	Enrollment		First dose
	Demographics	Baseline Data	Patient Morale Questionnaire
2			

Practice overview

Use advanced REDCap functionalities

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



- Account manager
- Reminders

Design

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

Structure

- Longitudinal & Events
- Repetitions
- Surveys

Monitoring

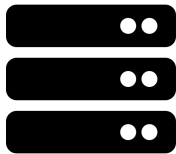
- CSV* & Data Dictionary
- Export
- Importing Data
- Data quality

Other

- Alerts and Notifications
- Data Access Groups
- External modules
- Woodclap

* *Newest features*

Centre d'Investigation Clinique
de Neurosciences Production Server

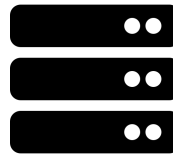


REDCap CIC

Specific account

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

ICM Production Server

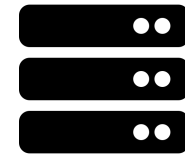


REDCap ICM

Specific account

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

ICM Staging server



REDCap Dev

ICM login

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

Exercise

1. **Go** to <https://redcap-icm-staging.icm-institute.org/>
2. Connect with your **ICM** account

Account manager

User creation



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

User management

Overview

Project Admins

Manage the project



PI



Data Manager
Arc referent

Project Users

Custom rights for each




User management

Create a user

To create a new user (Table-based authentication ONLY), provide the new user name along with the user's name and email address. Once created, the user will receive an email with log in information.

Basic attributes:

Username:  ← Username (firstname.lastname)

First name: ← Firstname

Last name: ← Lastname

Primary email: ← Email

Notification Preferences for REDCap Messenger:

Frequency of email notifications for any new messages received:

Enable instant email notifications for 'important' messages and messages where you are tagged (@username)? This overrides the frequency setting above. ☒

Optional attributes:

Secondary email:

Tertiary email:

Institution ID: ← You can specify the Institution here
(OPTIONAL Identifier specific to your institution.)

User's sponsor (secondary contact person):
(REDCap username of sponsor)

A user's sponsor is the person to contact regarding this user account and may be the person who requested that this account be created.

Expiration Date:  D-M-Y H:M
Time that the user's account will be automatically suspended. User will be notified via email 14 days prior to their suspension, and if the user has a sponsor listed above, the sponsor will be CC'd on that email so that they are aware.

Miscellaneous comments about the user:

Expand

☒ Display user on 'Email Users' page?

☒ Allow this user to request that projects be created for them by a REDCap administrator?
(If not checked, they will neither be able to create new projects nor request that new ones be created for them.)

← Untick this if you create a basic user !

Save

Cancel

← Save

Account management

Overview

- Keep using the surveys to ask for accounts
 - Training server : Use your ICM account
 - ICM Clinical production : https://is.gd/redcap_icm_request
 - CIC Clinical production : https://is.gd/redcap_cic_request
- If you are interested, contact me
 - You will be given a special right
 - You will be able to create your users

Reminders

REDCap



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



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

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

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

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		

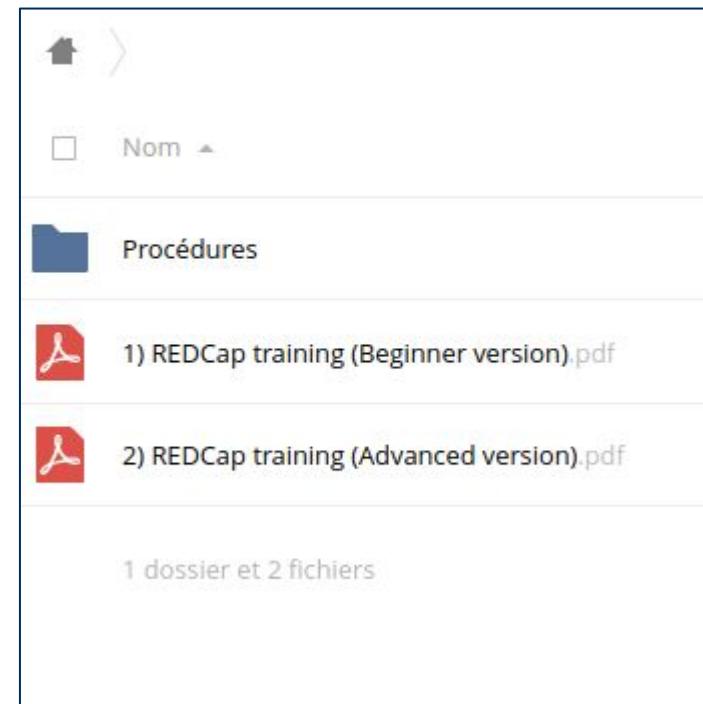
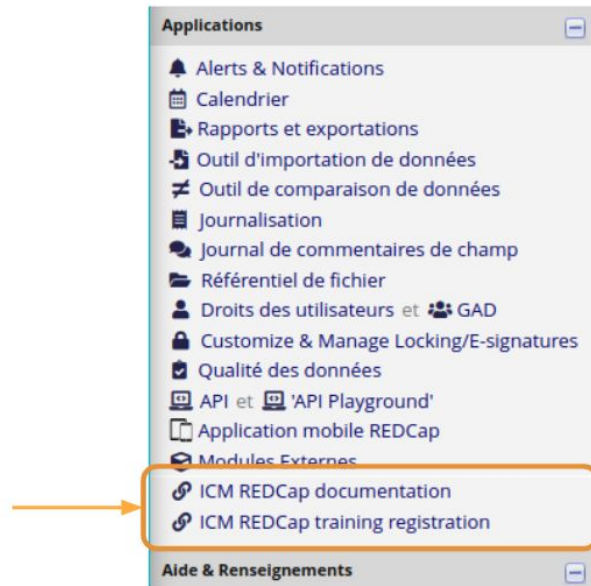
The projects listed below are public and are accessible by anyone. No authentication (i.e. username/password) is required to access them directly.

Public Projects

Basic Demography
Classic Database
Human Cancer Tissue Biobank
Longitudinal Database (1 arm)
Longitudinal Database (2 arms)
Multiple Surveys (classic)

How to get help

REDCap Support :



Create a field

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

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

Upload your Protocols and other document in REDCap

REDCap
Logged in as mathias.antunes
Log out
My Projects or Control Center
REDCap Messenger
View project as user: -- select a user --

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

Paris Brain Institute
Search, find, cure, for you, with you
ICM Paris Brain Institute

ADMIN pre-prod project PID 127

File Repository
This page may be used for storing and retrieving files and documents used for this project. You may upload files here to save for retrieval later, or you may download previously uploaded files in the file list below. Whenever a data export is performed, the resulting data and syntax files are stored here also.

User Files Data Export Files Upload New File

To upload a new file to the repository, in the fields below specify the file on your computer and provide a name/label for the file. Then click the "Upload File" button. (Max file size: 128MB)

Adding new file

Document Parcourir... Aucun fichier sélectionné.

Name/Label

Expand

Upload File -- Cancel --

To do !

✓ Account manager

✓ Reminders

Design

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

Structure

- Longitudinal & Events
- Repetitions
- Surveys

Monitoring

- CSV* & Data Dictionary
- Export
- Importing Data
- Data quality

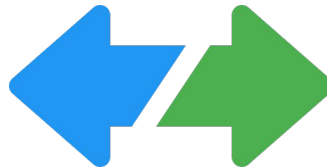
Other

- Alerts and Notifications
- Data Access Groups
- External modules
- Woodclap

* *Newest features*

Piping

a Smart eCRF



Re-use your variables across your project !

Edit Field

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

Field Type: Multiple Choice - Radio Buttons (Single Answer)

Field Label ☐ Use the Rich Text Editor ?

languages

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

1, English
2, Espagnol

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

Action Tags / Field Annotation (optional)

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

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

languages ☒ Enable auto naming of variable based upon its Field Label?

ONLY letters, numbers, and underscores

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

Required?* ☒ No ☐ Yes
* Prompt if field is blank

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

Custom Alignment Right / Vertical (RV)

Align the position of the field on the page

Field Note (optional)

Small reminder text displayed underneath field

Save **Cancel**

“The 'Piping' feature in REDCap allows you to inject previously collected data into text on a data collection form or survey, thus providing greater precision and control over question wording.”

Setup:

Variable: ice_cream

What is your favorite ice cream?

☐ Chocolate
☐ Vanilla
☐ Strawberry

reset

Add Field Add Matrix of Fields

Variable: slider

How much do you love [ice_cream] ice cream?

Hate it Indifferent I love [ice_cream]!

Click bar above and then drag to set response

reset

Before:

What is your favorite ice cream?

☐ Chocolate
☐ Vanilla
☐ Strawberry

reset

How much do you love _____ ice cream?

Hate it Indifferent I love _____!

Click bar above and then drag to set response

After:

What is your favorite ice cream?

☒ Chocolate
☐ Vanilla
☐ Strawberry

reset

How much do you love Chocolate ice cream?

Hate it Indifferent I love Chocolate!

Click bar above and then drag to set response

Syntax of Piping

➤ **Classic** projet

- `[variable_name]` *eg: [patient_gender]*

➤ **Longitudinal** project

- `[event_name][variable_name]` *eg: [baseline_arm_1][birthdate]*

➤ **Repeated** project

- `[variable_name][repeat_instance]` *eg: [patient_ae][1]*

➤ **Longitudinal repeat** project

- `[event_name][variable_name][repeat_instance]`

eg: [baseline_arm_1][adverse_event_name][1]


Syntax of Piping









Get the [event_name] : *Inside 'define my events'*

Define your events and designate instruments for them

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

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



		Event #	Event Name	Custom Event Label  (optional)	Unique event name  (auto-generated)
	 	1	Enrollment		enrollment_arm_1
	 	2	Dose 1		dose_1_arm_1
	 	3	Visit 1		visit_1_arm_1

exercise Piping

1. Create a **instrument**
2. Re-Create this example

Setup:

The screenshot shows the 'Setup' phase of an instrument. It contains two fields:

- Field 1:** Variable: ice_cream. Question: "What is your favorite ice cream?". Options: Chocolate, Vanilla, Strawberry. A "reset" button is in the bottom right.
- Field 2:** Variable: slider. Question: "How much do you love [ice_cream] ice cream?". Scale: "Hate it" to "I love [ice_cream]!". A slider bar is shown with a blue knob. A red text instruction says "Click bar above and then drag to set response". A "reset" button is in the bottom right.

Between the two fields are buttons for "Add Field" and "Add Matrix of Fields".

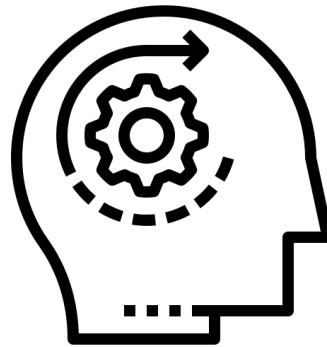
3. Create a record and Visualize in the Dashboard

The screenshot shows the 'Dashboard' phase of the instrument. It displays the recorded responses:

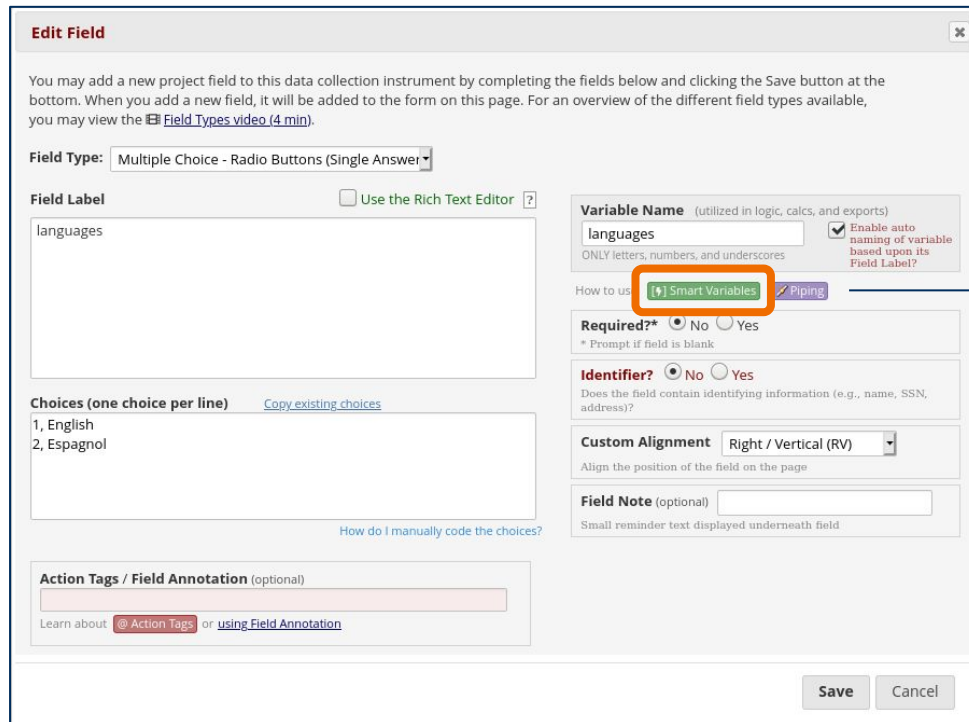
- Field 1:** Question: "What is your favorite ice cream?". Response: Chocolate (selected with a blue dot). A "reset" button is in the bottom right.
- Field 2:** Question: "How much do you love Chocolate ice cream?". Response: The slider is positioned between "Indifferent" and "I love Chocolate!". A red text instruction says "Click bar above and then drag to set response".

Smart variables

a Smart eCRF



Smart variables



Edit Field

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

Field Type: Multiple Choice - Radio Buttons (Single Answer)

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

languages

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

1, English
2, Espagnol

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

Action Tags / Field Annotation (optional)

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

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

languages ☒ Enable auto naming of variable based upon its Field Label?

ONLY letters, numbers, and underscores

How to use

Smart Variables [Piping](#)

Required? ☒ No ☐ Yes
* Prompt if field is blank

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

Custom Alignment Right / Vertical (RV) [?](#)
Align the position of the field on the page

Field Note (optional)

Small reminder text displayed underneath field

Save **Cancel**

“Smart Variables’ that allow you to reference information other than data fields. Smart Variables are context-aware and thus adapt to many different situations”

Event & Arm			
[event-name]	(longitudinal only) The current event (unique event name). Note: This can be used as stand-alone or can be prepended to a field variable.	[event-name]	event_2_arm_1
		[event-name][weight]	125
[event-label]	(longitudinal only) The current event (the event label, not the unique event name).	[event-label]	Event 2
[previous-event-name]	(longitudinal only) The event (unique event name) that occurs immediately before the current event (blank if current event is the first event). Note: This can be used as stand-alone or can be prepended to a field variable. Important: When using this as a stand-alone variable, it will always return the event that occurs *immediately* before the current event, whereas if it is prepended to another variable, it will instead return the closest previous event for which the field's instrument has been designated, which might be different than the event that occurs directly before the current event. This behavior is due to the fact that the field's instrument might not always be designated for the event that occurs directly before the current event.	[previous-event-name]	visit_4_arm_2
		[previous-event-name][heart_rate]	62
[previous-event-label]	(longitudinal only) The event (the event label, not the unique event name) that occurs immediately before the current event (blank if current event is the first event).	[previous-event-label]	Visit 4
[next-event-name]	(longitudinal only) The event (unique event name) that occurs immediately after the current event (blank if current event is the last event). Note: This can be used as stand-alone or can be prepended to a field variable. Important: When using this as a stand-alone variable, it will always return the event that occurs *immediately* after the current event, whereas if it is prepended to another variable, it will instead return the closest following event for which the field's instrument has been designated, which might be different than the event that occurs directly after the current event. This behavior is due to the fact that the field's instrument might not always be designated for the event that occurs directly after the current event.	[next-event-name]	event_3_arm_5
		[next-event-name][provider]	Taylor

Repeating Instruments and Events			
[previous-instance]	(repeating instruments/events only) The repeating instance number that occurs immediately before the current instance (e.g., current instance minus 1). 'Instance' refers to the instance of either a repeating instrument or a repeating event. Note: This can be used as stand-alone or can be appended to a field variable.	[previous-instance]	3
		[weight][previous-instance]	145
[current-instance]	(repeating instruments/events only) The repeating instance number of a repeating instrument or a repeating event in the current context. Note: This can be used as stand-alone or can be appended to a field variable.	[current-instance]	2
		[heart_rate][current-instance], which is the same as [heart_rate]	84
[next-instance]	(repeating instruments/events only) The repeating instance number that occurs immediately after the current instance (e.g., current instance plus 1). 'Instance' refers to the instance of either a repeating instrument or a repeating event. Note: This can be used as stand-alone or can be appended to a field variable.	[next-instance]	7
		[provider][next-instance]	Harris
[first-instance]	(repeating instruments/events only) The first (lowest numbered) repeating instance number for the current record/event context. Note: This can be used as stand-alone or can be appended to a field variable.	[first-instance]	1
		[age][first-instance]	24
[last-instance]	(repeating instruments/events only) The last (highest numbered) repeating instance number for the current record/event context. Note: This can be used as stand-alone or can be appended to a field variable.	[last-instance]	6
		[glucose][last-instance]	119

Key smart variables

➤ Classic projet

- **[record-name]** *current name of the record eg: 1*

➤ Longitudinal project

- **[event-name]** *current event name eg: [demographics_arm_1]*







➤ Repeated project

- **[current-instance]** *eg: 2*
- **[previous-instance]** *eg : 1*

exercise Smart Variables

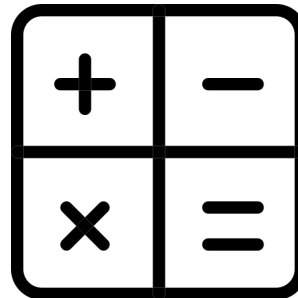
1. Create a **project** with **Classic Database Repeated**
2. Prefill the Serum Albumin (g/dL) with the previous follow-up
 - @DEFAULT='[alb_1][previous-instance]' in the action tag
3. Create a Record and 2 Followup data, Visualize in the Dashboard

Study ID 1

 Data Collection Instrument	Status
Demographics	
Baseline Data	
Followup Data	 
Completion Data	

Advanced Calculated Fields

Auto score



Calculated field

Syntax

Example of complexe calculation : $(([\text{this}] + 525) / 34) + (([\text{this}] / ([\text{that}] - 1000)) * 9.4)$

Learn how to use  Special Functions

Practical examples for common use cases

1. Calculate the number of days separating today's date and a date/datetime field's value in the past or future.
`datediff([date1], 'today', 'd')`
2. Calculate a person's age based on date of birth.
`rounddown(datediff([date_of_birth], 'today', 'y'))`
3. Calculate a person's BMI (in metric units of 'cm' and 'kg') and rounding to the first decimal place.
`round(([weight]*10000)/(([height])^(2)), 1)`
4. Calculate a person's BMI (in English units of 'lb' and 'in') and rounding to the first decimal place.
`round(([weight]/(([height])^(2))*703), 1)`
5. Remove a prefix and dash from the beginning of a record name (e.g., convert '4890-2318' to '2318').
`mid([record-name], find('-', [record-name])+1, length([record-name])-find('-', [record-name])+1)`
6. Convert a person's first and last name into a username-looking format (e.g., convert 'John' and 'Doe' to 'john_doe'). We may want to trim the values just in case there were spaces accidentally entered.
`lower(concat(trim([first_name]), '_', trim([last_name])))`
7. Add leading zeros to an integer, in which the number near the end of the equation represents the maximum length of the result after adding the leading zeros (i.e., converts '7' to '007'). Note: The amount of 0s listed in '00' should be at least one less than the value of the number near the end (e.g., if '4', then we need '000'; if '3', then '00').
`right(concat('00', [my_integer]), 3)`

Calculated field

Good practices

- Recalculate ALL calc filed with rule H
 - *Data Quality module*
- Don't use OR
 - *Use if inside each other*
- Replace '+' by sum()
 - *More robust !*
- Hide fields rather than putting zero

Calculated field

Good practices

➤ Recalculate ALL calc filed with rule H

○ *Data Quality module*

Rule #	Rule Name	Rule Logic (Show discrepancy only if...)	Real-time execution <input type="checkbox"/>	Total Discrepancies	Delete rule?
A	Blank values*	-		<input type="button" value="Execute"/>	
B	Blank values* (required fields only)	-		<input type="button" value="Execute"/>	
C	Field validation errors (incorrect data type)	-		<input type="button" value="Execute"/>	
D	Field validation errors (out of range)	-		<input type="button" value="Execute"/>	
E	Outliers for numerical fields (numbers, integers, sliders, calc fields)**	-		<input type="button" value="Execute"/>	
F	Hidden fields that contain values***	-		<input type="button" value="Execute"/>	
G	Multiple choice fields with invalid values	-		<input type="button" value="Execute"/>	
H	Incorrect values for calculated fields	-		205 export view	
I	Fields containing "missing data codes"	-		<input type="button" value="Execute"/>	

Calculated field

Good practices

➤ Don't use OR

- *Use if inside each other*

"if (CONDITION, VALUE if condition is TRUE, VALUE if condition is FALSE)"

- **But you can put if inside if :**

"if (CONDITION, TRUE, if (CONDITION, TRUE, FALSE))"

Exercise Calculation

- 1) Create a new instrument "Calculated field"
 - a) Create 2 variables "score_1" and "score_2" (integer text)
 - b) Create a calculated variable with " $[score_1] - [score_2]$ "
- 2) Create a record and fill some data in the 2 scores.
 - a) Check if the calculated score is correct and save
- 3) Change the calculation to " $sum([score_1], [score_2])$ "
 - a) Execute the Rule H in the Data Quality
 - b) Check if the re-calculated score is correct

Advanced Branching logic

Checkboxes



Branching Logic

Syntaxe

Choose method below for the following field: **desc1** - 2012 2013 2014 2015 2016 Federal Grants ...

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

Show the field ONLY if...

[Clear logic](#)

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

— OU —

☒ **Concepteur de Logique glisser-déposer**

Afficher les choix de champs pour le formulaire suivant :
Demographics ▾

Choix de champs provenant d'autres champs
Glisser un choix ci-dessous vers la boîte à droite

study_id = (définir des critères)	⇒ Glisser et Déplacer ⇒	
first_name = (définir des critères)		
last_name = (définir des critères)		
address = (définir des critères)		
telephone_1 = (définir des critères)		
email = (définir des critères)		
dob = (définir des critères)		

Voir le champ SEULEMENT si...
☒ TOUTES les conditions ci-dessous sont remplies
☐ L'une des conditions ci-dessous est remplie

Branching Logic

Checkboxes

➤ For most variable

- *Use $[variable]=1$*

radio	
0	Hispanic or Latino
1	NOT Hispanic or Latino
2	Unknown / Not Reported

Alignement personnalisé : LH

➤ For checkboxes

- *Use $[variable(code)]=0$ or 1
(*uncheck or check*)*

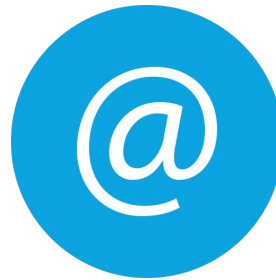
checkbox		
0	gym__0	Monday
1	gym__1	Tuesday
2	gym__2	Wednesday
3	gym__3	Thursday
4	gym__4	Friday

Exercise branching logic

1. Create a **new instrument** for this exercise “branching logic”
2. Create a variable **checkbox** with “choice1” and “choice2”
3. Create a Note variable only visible if choice1 is selected
 - Use branching with graphical interface
 - look at the logic generated `[checkbox(1)]=1`
4. Create a record and Visualize in the Data Entry mode

Actions Tags

@tags



Actions tags

New ones !

Learn how to use [Smart Variables] [Piping] @ Action Tags [Field Embedding] [Special Functions]



@SETVALUE

Sets a field's value to static text or dynamic/piped text whenever a data entry form or survey page is loaded

@INLINE

@NOAllows a PDF file or image file (JPG, JPEG, GIF, PNG, TIF, BMP) that is uploaded to a File Upload field to be displayed in an inline manner

@HIDDEN-PDF

Hides the field only in the downloaded PDF of one or more instruments (including blank PDFs, PDFs with data, and compact PDFs with data)

@NOMISSING

Disable 'missing data codes' for a field

Action Tags

New useful ones

Learn how to use Smart Variables Piping **@ Action Tags** Field Embedding Special Functions



@CALCDATE	Performs a date calculation by adding or subtracting a specified amount of time from a specified date or datetime field and then provides the result as a date or datetime value - e.g., @CALCDATE([visit_date], 7, 'd'). The first parameter inside the @CALCDATE() function should be a text field with date, datetime, or datetime_seconds validation, in which you may specify (if needed) the event and repeating instance - e.g., @CALCDATE([baseline_event][visit_date], 7, 'd'). The second parameter represents the offset number amount that should be added or subtracted. It can be a decimal number or integer. Tip: To subtract (i.e., go backwards in time), use a negative number. The third parameter represents the units of the offset amount, which will be represented by the following options: 'y' (years, 1 year = 365.2425 days), 'M' (months, 1 month = 30.44 days), 'd' (days), 'h' (hours), 'm' (minutes), 's' (seconds). The unit option must be wrapped in quotes or apostrophes. NOTE: Both the source field and the result field must be a text field with date, datetime, or datetime_seconds validation. It is important to realize that a field with @CALCDATE will not be editable on the survey page or data entry form, and the field will function almost exactly like a normal calculated field, in which its value may get updated via a data import, when running Data Quality rule H, or in real-time during normal data entry on a form or survey.
@CALCTEXT	Evaluates logic that is provided inside a @CALCTEXT() function and outputs the result as text, typically performed with an if(x,y,z) function - e.g., @CALCTEXT(if([gender]='1', 'male', 'female')). NOTE: It is important to realize that a field with @CALCTEXT will not be editable on the survey page or data entry form, and the field will function almost exactly like a normal calculated field, in which its value may get updated via a data import, when running Data Quality rule H, or in real-time during normal data entry on a form or survey. If desired, it is possible to return the value as a number - e.g., @CALCTEXT(if([age] >= 18, 'adult', 5*[other_field])). Also, while it is possible to use static text (in quotes), field variables, or Smart Variables as the return values of the IF function - e.g., @CALCTEXT(if([age] >= 18, [dob], [event-label])) - it is NOT possible to pipe field variables or Smart Variables <u>inside quotes</u> for the return values.

exercise @actiontags

1. Create a **new instrument** for this exercise “@ActionTags”
2. Create a text variable “My Secondary Project ID” with **@CALCTEXT(concat("Myproject_", [record-name]))** in the action tag
3. Execute the **rule H** to recalculate all ! (Data Quality)
4. Create a record and Visualize in the Data Entry mode



The screenshot shows a data entry interface. On the left, the label "My Project ID" is displayed. To its right is a text input field containing the value "Myproject_1". Above the input field is a small circular icon with the letter "H". Below the input field is a small speech bubble icon. To the right of the input field is a button labeled "View equation".

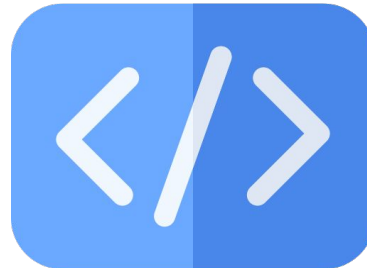
√ Special Functions



left (text, number of characters)	Returns the leftmost characters	Returns the leftmost characters from a text value. For example, left([last_name], 3) would return 'Tay' if the value of [last_name] is 'Taylor'.
right (text, number of characters)	Returns the rightmost characters	Returns the rightmost characters from a text value. For example, right([last_name], 4) would return 'ylor' if the value of [last_name] is 'Taylor'.
length (text)	Returns the number of characters	Returns the number of characters in a text string. For example, length([last_name]) would return '6' if the value of [last_name] is 'Taylor'.
find (needle, haystack)	Finds one text value within another	Finds one text value within another. Is case insensitive. The "needle" may be one or more characters long. For example, find('y', [last_name]) would return '3' if the value of [last_name] is 'Taylor'. The value '0' will be returned if "needle" is not found within "haystack".
mid (text, start position, number of characters)	Returns characters from a text string starting at a position	Returns a specific number of characters from a text string starting at the position you specify. The second parameter denotes the starting position, in which the beginning of the text value would be '1'. The third parameter represents how many characters to return. For example, mid([last_name], 2, 3) would return 'AYL' if the value of [last_name] is 'TAYLOR'.
concat (text,text,...)	Combines the text from multiple text strings	Combines/concatenates the text from multiple text strings into a single text value. For example, concat([first_name], ' ', [last_name]) would return something like 'Rob Taylor'. Each item inside the function must be separated by commas. Each item might be static text (wrapped in single quotes or double quotes), a field variable, or a Smart Variable.
upper (text)	Converts text to uppercase	Converts text to uppercase. For example, upper('John Doe') will return 'JOHN DOE'.
lower (text)	Converts text to lowercase	Converts text to lowercase. For example, lower('John Doe') will return 'john doe'.
trim (text)	Removes spaces from the beginning and end of text	Removes any spaces from both the beginning and end of a text value. For example, trim(' Sentence with spaces on end. ') will return 'Sentence with spaces on end.'

Field Embedding*

Customization !



Example 1

Max customization

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

EXAMPLE 1

Record ID 3

Sponsored Research Proposals

	2012	2013	2014	2015	2016
Federal Grants	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Non-federal Grants	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Research Agreements/Contracts	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Food question

How often did you eat spicy foods last year?

number of servings




☐ Do not know / Prefer not to answer

☐ Per day
☐ Per week
☐ Per month
reset

Example 2

Max customization

EXAMPLE 2

Patient name:		First	Last	
Date of birth:	<input type="text"/>	 M-D-Y	Sex: <input type="radio"/> Male <input type="radio"/> Female <input type="radio"/> Unknown <input type="radio"/> Other reset	Ethnicity: <input type="radio"/> Hispanic/Latino <input type="radio"/> Non-Hispanic-Latino <input type="radio"/> Not specified reset
Age (in either years/months/days):	<input type="text"/>	Age units:	<input type="radio"/> Years <input type="radio"/> Months <input type="radio"/> Days reset	
.....PATIENT IDENTIFIER INFORMATION ABOVE IS NOT TRANSMITTED TO CDC.....				
Reporting jurisdiction:	<input type="text"/>	Case State/local ID:	<input type="text"/>	
Reporting health department:	<input type="text"/>	CDC 2019-nCoV ID:	<input type="text"/>	
Contact ID ^a:	<input type="text"/>	NNDSS loc.rec.ID/Case ID ^b:	<input type="text"/>	
Was the patient hospitalized? <input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Unknown reset	Admission Date <input type="text"/>  M-D-Y	Discharge Date <input type="text"/>  M-D-Y		
Interviewer information				
Name of interviewer:	Last Name	<input type="text"/>	First Name	<input type="text"/>
Affiliation/Organization:	<input type="text"/>		Telephone:	<input type="text"/>
Email:	<input type="text"/>			

How to embed

Max customization

	2012	2013	2014	2015	2016
Federal Grants	{grant2012}	{grant2013}	{grant2014}	{grant2015}	{grant2024}
Non-federal Grants	{grant2016}	{nfgrant2012}	{nfgrant2013}	{nfgrant2014}	{grant2025}
Research Agreements/Contracts	{nfgrant2015}	{nfgrant2016}	{grant2022}	{grant2023}	{grant2026}

Variable: desc1
Federal Grants 2012

Variable: grant2012
Federal Grants 2012

Variable: grant2013
Federal Grants 2013

Variable: grant2014
Federal Grants 2014

Variable: grant2015
Federal Grants 2015

Variable: grant2016
Federal Grants 2016

How to embed

Max customization

Field Embedding

Edit Field

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

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

Field Label

☒ Use the Rich Text Editor ?

Paragraph	B	I								

	2012	2013	2014	2015	2016
Federal Grants	{fed2012}	{fed2013}	{fed2014}	{fed2015}	{fed2016}
Non-federal Grants	{nfed2012}	{nfed2013}	{nfed2014}	{nfed2015}	{nfed2016}
Research Agreements/Contracts	{contr2012}	{contr2013}	{contr2014}	{contr2015}	{contr2016}

1. Create a new instrument and re-create this :

The screenshot shows a survey instrument editor interface. It features two main sections, each with a title bar and a content area. The first section, titled "Combo radio buttons with text boxes", has a yellow title bar and a light gray content area. It includes a toolbar with icons for edit, copy, paste, and delete, and a variable name "radio_choices". The content area contains three radio buttons: "My first choice", "My second choice", and "Other {other1}". A "reset" button is located at the bottom right. The second section, titled "Radio choices with custom 'other' option", has a light gray title bar and a light gray content area. It includes a toolbar with icons for edit, copy, paste, and delete, and a variable name "other1". The content area contains three radio buttons: "My first choice", "My second choice", and "Other {other1}". A text input field labeled "Enter custom text" is positioned below the "Other" option. A "reset" button is located at the bottom right. A green notification box at the top right of the second section states "Field is embedded elsewhere on page".

2. Create a record and Visualize in the Dashboard

The screenshot shows a survey instrument visualization. It features a light green background. The title "Radio choices with custom 'other' option" is displayed in bold. Below the title, there are three radio buttons: "My first choice", "My second choice", and "Other". The "Other" option is selected, and a text input field labeled "Enter custom text" is positioned next to it. A "reset" button is located at the bottom right.

To do !

- ✓ Account manager
- ✓ Reminders

Design

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

Structure

- Longitudinal & Events
- Repetitions
- Surveys

Monitoring

- CSV* & Data Dictionary
- Export
- Importing Data
- Data quality

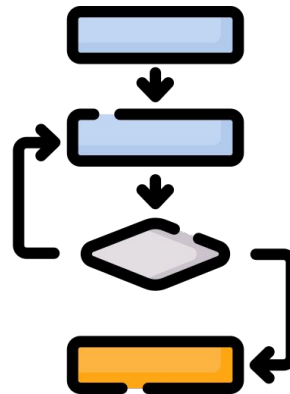
Other

- Alerts and Notifications
- Data Access Groups
- External modules
- Woodclap

* *Newest features*

Project type








Reminders







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 (Time)

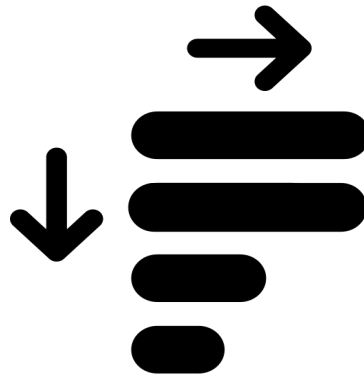
 Data Collection Instrument	Enrollment	Dose 1	Visit 1	Dose 2	Visit 2	Dose 3	Visit 3	Final visit
Demographics								
Baseline Data								
Visit Lab Data								
Patient Morale Questionnaire								
Visit Blood Workup								
Visit Observed Behavior								
Completion Data								
Completion Project Questionnaire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

Main project settings

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


Project type

Longitudinal



Project type

Longitudinal



Logged in as **site_admin**

- My Projects
- Project Home
- Project status: **Production**

Data Collection

- Record Status Dashboard
- Add / Edit Records
- Study ID 1 [Select other record](#)

Applications

- Calendar
- Data Exports, Reports, and Stats
- Data Import Tool
- Data Comparison Tool
- Logging
- Field Comment Log
- File Repository
- Data Quality

External Modules

- Search Dashboard

Help & Information

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

Longitudinal Database (1 arm)

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.

[Choose action for record](#)

Legend for status icons:

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

✓ Study ID 1 successfully added

Study ID 1

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								●

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 by 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

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? [?]

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

I'm done!

Enable optional modules and customizations

Optional

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 [?]

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.



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. Modify the event to obtain

☒ Use longitudinal data collection with defined events?

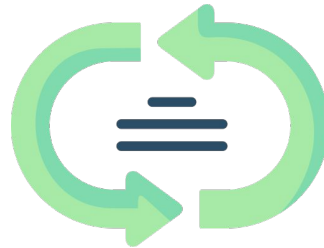

Define your events and designate instruments for them
 Create events for re-using data collection instruments and/or set up scheduling.
 Go to or

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**

Repetiting

Endless data



Project Type

Repeatable

Classic repeatable

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

Modify Repeatable instruments ?

Data Collection Instrument	Status
Demographics	
Baseline Data	
Follow up Data	
Completion Data	

Longitudinal Repeatable

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								

Modify Repeatable instruments ?

Data Collection Instrument	Enrollment	Visit (#1)	(#2)	+ Add new (#3)	End of study
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:

Repeatable Survey

Data Collection Instrument	Status
Pre-Screening Survey (survey)	
Participant Info Survey (survey)	
Participant Morale Questionnaire (survey)	
Completion Data (to be entered by study personnel only)	

Modify Repeatable instruments ?

Data Collection Instrument	Status
Pre-Screening Survey (survey)	
Participant Info Survey (survey)	
Participant Morale Questionnaire (survey)	
Completion Data (to be entered by study personnel only)	

Classic repeating

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

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

Help & Information

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

Classic Database Repeated

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
I'm done!

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

Design your data collection instruments

Not started
I'm done!

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

Enable optional modules and customizations

Optional
I'm done!

Modify Repeatability 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)

Optional
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.
Go to Add or edit bookmarks

User Rights and Permissions

Optional

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

Repeatable instruments

An excellent way to collect repeating data in REDCap is to use repeatable instruments and/or repeatable events. This is sometimes called one-to-many data collection. Some examples may include but are not limited to the following: data from multiple visits or observations, concomitant medications, adverse events, or repetitive surveys (daily, weekly, etc.).

Below you can specify a data collection instrument to be infinitely repeatable, which means that an instrument can be repeated over and over again (a different number of times for each record) even without enabling REDCap's longitudinal module. Once an instrument is set to repeat, you will see options on the Record Home Page to add another instance of the instrument for the currently selected record. All instances of a repeating instrument will then be displayed as a table near the bottom of the Record Home Page, thus allowing viewing of the instances and easy navigation within them.

Repeat this instrument?	Instrument name	Custom label for repeating instruments (optional)
<input type="checkbox"/>	Demographics	Example: [visit_date], [weight] kg
<input type="checkbox"/>	Baseline Data	
<input checked="" type="checkbox"/>	Follow up Data	
<input type="checkbox"/>	Completion Data	

Save Cancel

Classic repeating

Repeating Instruments

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.

Choose action for record ▾

✓ Study ID 1 successfully edited

Study ID 1

Data Collection Instrument	Status
Demographics	
Medications	
Family Members	
Visits	
Adverse Events	

Legend for status icons:

- Incomplete
- Incomplete (no data saved) ?
- Unverified
- Complete
- Many statuses (all same)
- Many statuses (mixed)

Repeating Instruments

Medications		
1		Placebo 1mg
2		Aspirine 2mg
Add new		

Family Members		
1		Sam
2		Sylvie
Add new		

Visits		
1		1kg (12-13-2019)
2		2kg (12-13-2019)
Add new		

Adverse Events		
1		
Add new		

exercise : use a template

1. Create a new project with
“Classic Database Repeated” template

Data Collection Instrument	Status
Demographics	
Baseline Data	
Follow up Data	
Completion Data	

Modify Repeatable instruments ?

2. Make “Completion data” also repeatable
 - Check how Follow up data is repeatable

Repeat this instrument?	Instrument name	Custom label for repeating instruments (optional)
		Example: [visit_date], [weight] kg
<input type="checkbox"/>	Demographics	<input type="text"/>
<input type="checkbox"/>	Baseline Data	<input type="text"/>
<input checked="" type="checkbox"/>	Follow up Data	<input type="text"/>
<input type="checkbox"/>	Completion Data	<input type="text"/>

3. Create a record
 - Create 2 empty “Completion data”

Data Collection Instrument	Status
Demographics	
Baseline Data	
Follow up Data	
Completion Data	

4. Visualize in the Dashboard and in Patient Dashboard

Longitudinal repeatable

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

Study ID 1 [Select other record](#)

Applications

Alerts & Notifications
 Calendar
 Data Exports, Reports, and Stats
 Data Import Tool
 Data Comparison Tool
 Logging
 File Repository
 User Rights and DAGs
 Customize & Manage Locking/E-signatures
 Data Quality and Resolve Issues
 API and API Playground
 REDCap Mobile App
 External Modules
 Neuroinformatics

Longitudinal Database (1 arm) Repeated

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 ● ● ● Many statuses (all same)
- Complete ● Many statuses (mixed)

Study ID 1

Data Collection Instrument	<div> <div></div> <div>+ Add new</div> </div>				End of study
	Enrollment	Visit (#1)	(#2)	(#3)	
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:	×	×	×	×	

Longitudinal repeatable

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
File Repository
User Rights and DAGs
Customize & Manage Locking/E-signatures
Data Quality and Resolve Issues
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) Repeated

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

Project status: Development Completed steps 0 of 8

1 Not started

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

2 Not started

Design your data collection instruments

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

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

3 In progress

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

3 Option

Enable optional modules and customizations

Modify 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)

Repeatable instruments and events

An excellent way to collect repeating data in REDCap is to use repeatable instruments and/or repeatable events. This is sometimes called one-to-many data collection. Some examples may include but are not limited to the following: data from multiple visits or observations, concomitant medications, adverse events, or repetitive surveys (daily, weekly, etc.).

Below you can specify a data collection instrument or a whole event of instruments to be infinitely repeatable, in which each repeating instrument or event can be repeated a different number of times for each record. You may set any event in the project to be repeatable *or* alternatively set selected instruments to be repeatable within an event. **The 'Repeat Entire Event' option means that all the event's instruments will repeat together and stay connected, whereas the 'Repeat Instruments' option implies that the instruments will repeat separately and independently from each other on that event.** Once an instrument or event is set to repeat, you will see options on the Record Home Page to add another instance of the instrument/event for the currently selected record.

Event Name	Repeat entire event or selected instruments?	Instrument name (select instruments to repeat)	Custom label for repeating instruments (optional)
Enrollment	-- not repeating --	<input type="checkbox"/> Demographics <input type="checkbox"/> Baseline Data	<input type="text"/> Example: [visit_date], [weight] kg
Visit	Repeat Entire Event (repeat a	<input checked="" type="checkbox"/> Visit Lab Data <input checked="" type="checkbox"/> Patient Morale Questionnaire <input checked="" type="checkbox"/> Visit Blood Workup <input checked="" type="checkbox"/> Visit Observed Behavior	<input type="text"/>
End of study	Repeat Instruments (repeat it	<input type="checkbox"/> Completion Data <input checked="" type="checkbox"/> Completion Project Question...	<input type="text"/>

Save Cancel

Longitudinal repeatable

Repeatable instruments and events

An excellent way to collect repeating data in REDCap is to use repeatable instruments and/or repeatable events. This is sometimes called one-to-many data collection. Some examples may include but are not limited to the following: data from multiple visits or observations, concomitant medications, adverse events, or repetitive surveys (daily, weekly, etc.).

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Event Name	Repeat entire event or selected instruments?	Instrument name (select instruments to repeat) Example: [visit_date], [weight] kg	Custom label for repeating instruments (optional)
Enrollment	-- not repeating --	<input type="checkbox"/> Demographics <input type="checkbox"/> Baseline Data	
Visit	Repeat Entire Event (repeat a...)	<input checked="" type="checkbox"/> Visit Lab Data <input checked="" type="checkbox"/> Patient Morale Questionnaire <input checked="" type="checkbox"/> Visit Blood Workup <input checked="" type="checkbox"/> Visit Observed Behavior	
End of study	Repeat Instruments (repeat i...)	<input type="checkbox"/> Completion Data <input checked="" type="checkbox"/> Completion Project Question...	

Save Cancel

Study ID 1

Data Collection Instrument	Enrollment	Visit (#1)	(#2)	+ Add new (#3)	End of study
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:	X	X	X	X	X

Repeating Instruments

Completion Project Questionnaire

End of study (1)

1

+ Add new

exercise : use a template

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

Data Collection Instrument	Enrollment	Visit (#1)	(#2)	+ Add new (#3)	End of study
Demographics	<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 type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Visit Blood Workup		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Visit Observed Behavior		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Completion Data					<input type="radio"/>
Completion Project Questionnaire					<input checked="" type="radio"/> +

2. Make “End of study” repeatable with ‘Entire event’ :

- Check Events repeated

☒ Repeatable instruments ?

Repeatable instruments and events

An excellent way to collect repeating data in REDCap is to use repeatable instruments and/or repeatable events. This is sometimes called one-to-many data collection. Some examples may include but are not limited to the following: data from multiple visits or observations, concomitant medications, adverse events, or repetitive surveys (daily, weekly, etc.).

Below you can specify a data collection instrument or a whole event of instruments to be infinitely repeatable, in which each repeating instrument or event can be repeated a different number of times for each record. You may set any event in the project to be repeatable *or* alternatively set selected instruments to be repeatable within an event. **The ‘Repeat Entire Event’ option means that all the event’s instruments will repeat together and stay connected, whereas the ‘Repeat Instruments’ option implies that the instruments will repeat separately and independently from each other on that event.** Once an instrument or event is set to repeat, you will see options on the Record Home Page to add another instance of the instrument/event for the currently selected record.

Event Name	Repeat entire event or selected instruments?	Instrument name (select instruments to repeat)	Custom label for repeating instruments (optional) Example: [visit_date], [weight] kg
Enrollment	-- not repeating --	<input type="checkbox"/> Demographics <input type="checkbox"/> Baseline Data	
✓ Visit	Repeat Entire Event (repeat a	<input checked="" type="checkbox"/> Visit Lab Data <input checked="" type="checkbox"/> Patient Morale Questionnaire <input checked="" type="checkbox"/> Visit Blood Workup <input checked="" type="checkbox"/> Visit Observed Behavior	
✓ End of study	Repeat Instruments (repeat li	<input type="checkbox"/> Completion Data <input checked="" type="checkbox"/> Completion Project Question...	

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

Advanced surveys

Participants



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
- Can't manage participants

■ Classic survey

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

Public Surveys

■ 1st instrument in survey mode

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			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

Public Surveys

Participants

Survey Distribution Tools

Public Survey Link **Participant List** Survey Invitation Log

The Participant List option allows you to **send a customized email** to anyone in your list and **track who responds to your survey**. It is also possible to identify an individual's survey answers, if desired, by providing an Identifier for each participant (this feature must first be enabled by clicking the 'Enable' button in the table below). Note: All survey responses collected are considered anonymous unless you 1) are using Participant Identifiers or 2) have enabled the designated email field for invitations. [More details](#)

Participant List belonging to Remove all participants

Displaying 1 - 50 of 62 Add participants Compose Survey Invitations Export list

Email	Record	Participant Identifier Enable	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
[No email listed]		Disabled		-		-	-
[No email listed]		Disabled		-			
[No email listed]		Disabled		-			
[No email listed]		Disabled		-			
[No email listed]		Disabled		-			
[No email listed]		Disabled		-		-	-
[No email listed]		Disabled		-			
[No email listed]		Disabled		-		-	-
[No email listed]		Disabled		-		-	-
[No email listed]		Disabled		-		-	-
[No email listed]		Disabled		-			
[No email listed]		Disabled		-		-	-
[No email listed]		Disabled		-			

Anonymous

Project type

Custom Surveys

Disable ☒ Use surveys in this project? ?

Disable ☒ Designate an email field for communications (including survey invitations and alerts) ?
Field currently designated: **email** ("Email")

Data Collection Instruments

Add new instrument:

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

Survey options:

- [Survey Queue](#)
- [Survey Login](#)
- [Survey Notifications](#)

Automated Survey Invitation options:

- [Upload or download Auto Invitations](#) ^
- [Re-evaluate Auto Invitations](#)

	Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
	Participants	2		Enable	Choose action ^	
	Survey 1	18		<input checked="" type="checkbox"/>	Choose action ^	Survey settings + Automated Invitations

Enable it per instrument

Then, access the settings

Custom Surveys

Compose invitation for all

Add or import
participants emails

Participant ID	Participants	Survey
1		

Survey Distribution Tools




Public Survey Link





Participant List

Survey Invitation Log

The Participant List option allows you to **send a customized email** to anyone in your list and **track who responds to your survey**. It is also possible to identify an individual's survey answers, if desired, by providing an Identifier for each participant (this feature must first be enabled by clicking the 'Enable' button in the table below). [More details](#)

Participant List belonging to "Survey 1"

Displaying 1 - 1 of 1  Add participants  Compose Survey Invitations  Export list

Email	Record	Participant Identifier	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
redcap@icm-institute.org	1	Disabled		-			

Select survey
to send

Compose the
invitation

Project type

Compose invitation 1 by 1

- Open survey
- Log out + Open survey
- Compose survey invitation
- Survey Access Code and QR Code

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

How open are you to further testing?

Form Status

Complete? Incomplete

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

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

4) How open are you to further testing?

Submit

Powered by REDCap

exercise Custom survey

1. Create a **new project** with **Advanced Survey Exercise**
2. Add redcap@icm-institute.org as participant

Participant ID	Participants	Survey
1		

3. Compose the invitation

Displaying

1 - 1

▼

of 1

Add participants

Compose Survey Invitations

Export list

Email	Record	Participant Identifier	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
redcap@icm-institute.org	1	Disabled		-			

4. Check the Survey Invitation Log

✓ Account manager

✓ Reminders

Design

✓ Piping

✓ Smart variables

✓ Advanced Calculated Fields

✓ Advanced Branching logic

✓ Action Tags*

✓ Field embedding*

Structure

✓ Longitudinal & Events

✓ Repetitions

✓ Surveys

Monitoring

□ CSV* & Data Dictionary

□ Export

□ Importing Data

□ Data quality

Other

□ Alerts and Notifications

□ Data Access Groups

□ External modules

□ Woodclap

Break time 10min & first questions !



00:04:34



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

To do !

✓ Account manager

✓ Reminders

Design

✓ Piping

✓ Smart variables

✓ Advanced Calculated Fields

✓ Advanced Branching logic

✓ Action Tags*

✓ Field embedding*

Structure

✓ Longitudinal & Events

✓ Repetitions

✓ Surveys

Monitoring

□ CSV* & Data Dictionary

□ Export

□ Importing Data

□ Data quality

Other

□ Alerts and Notifications

□ Data Access Groups

□ External modules

□ Woodclap


* *Newest features*

Data Dictionary



Data Dictionary

CSV & News !



Logged in as **mathias.antunes**
[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

[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](#)
[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](#)

Advanced Survey Exercise PID 20

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


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

This module may be used for making changes to the project, such as adding new fields or modifying existing fields, by using an offline method called the Data Dictionary. The Data Dictionary is a specifically formatted CSV (comma delimited) file within which you may construct your project fields and afterward upload the file here to commit the changes to your project.

Click the 'Browse' or 'Choose File' button below to select the file on your computer, and upload it by clicking the 'Upload File' button. Once your file has been uploaded, changes will NOT immediately be made but will be displayed and checked for errors to ensure that all the formatting in your Data Dictionary is correct before official changes are made to the project. **Snapshot note:** A snapshot of your project's current Data Dictionary will be created automatically during the Data Dictionary upload process before committing the new Data Dictionary. The snapshot can later be accessed and downloaded from the Project Revision History page.

Need some help?
 If you wish to view an example of how your Data Dictionary may be formatted, you may download the [Data Dictionary demonstration file](#), or you may view the [Data Dictionary Tutorial Video \(10 min\)](#). For help setting up your Data Dictionary, you may also see the instructions listed on the [Help & FAQ](#).

Steps for making project changes:

- 1.) [Download the current Data Dictionary](#)  - Also download with other delimiters: [Tab](#), [Semicolon \(;\)](#)
- 2.) Edit the Data Dictionary (see the [Help & FAQ](#) for help)
- 3.) Upload the Data Dictionary using the form below
- 4.) The changes will be made to the project after the Data Dictionary has been checked for errors

Upload your Data Dictionary file (CSV file format only)

Format for min/max validation values for date and datetime fields: MM/DD/YYYY or YYYY-MM-DD

Choose the delimiter for the uploaded file: Comma (,)

[Parcourir...](#) Aucun fichier sélectionné.

[Upload File](#)

All formats


Data Dictionary

New Excel Format

Classic CSV



Steps for making project changes:

- 1.) [Download the current Data Dictionary](#)  – Also download with other delimiters: [Tab](#), [Semicolon \(;\)](#)
- 2.) Edit the Data Dictionary (see the [Help & FAQ](#) for help)
- 3.) Upload the Data Dictionary using the form below
- 4.) The changes will be made to the project after the Data Dictionary has been checked for errors

Upload your Data Dictionary file (CSV file format only)

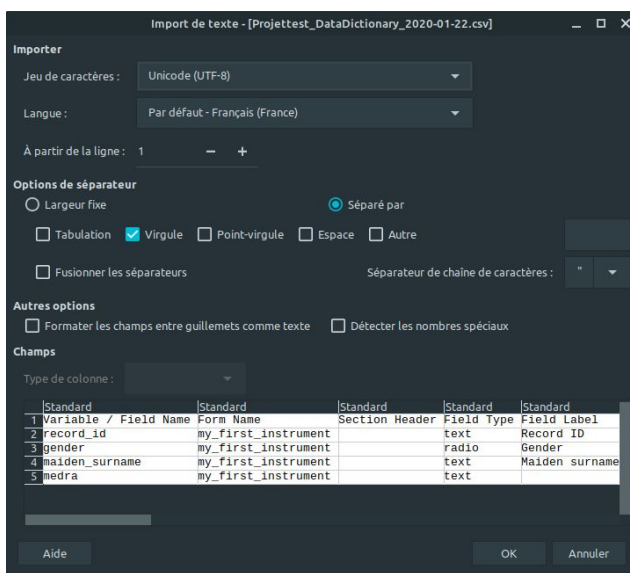
Format for min/max validation values for date and datetime fields:

Choose the delimiter for the uploaded file:

Parcourir...

Aucun fichier sélectionné.

Upload File



Only ; separator
And . as decimal

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Variable / Field Name	Form Name	Section Header	Field Type	Field Label	Choices, Calculations, OR Slider Labels	Field Note	Text Validation Type OR Show Slider Number	Text Validation Min	Text Validation Max	Identifier?	Branching Logic (Show field only if...)	Required Field?	Custom Al
2	record_id	my_first_instrument		text	Record ID									
3	gender	my_first_instrument		radio	Gender	h. Male f. Female								
4	maiden_surname	my_first_instrument		text	Maiden surname	h. Male f. Female						[gender] = 'F'		
5	medra	my_first_instrument		text	BIOPORTAL-MEDDRA									
6														
7														

Data Dictionary

CSV

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Variable / Field Name	Form Name	Section Header	Field Type	Field Label	Choices, Calculations, OR Slider Labels	Field Note	Text Validation Type OR Show Slider Number	Text Validation Min	Text Validation Max	Identifier?	Branching Logic (Show field only if...)	Required Field?	Custom A
2	record_id	my_first_instrument		text	Record ID									
3	gender	my_first_instrument		radio	Gender	h, Male f, Female								
4	maiden_surname	my_first_instrument		text	Maiden surname	h, Male f, Female						[gender] = 'f'		
5	medra	my_first_instrument		text		BIOPORTAL-MEDDRA								
6														
7														

Variable / Field Name	Unique variable name
Form Name	Instrument name
Field Type	Type of field (text, radio,...)
Field Label	Label, Question
Choices, Calculations, OR Slider Labels	Choices of dropdown field (h, Male f, Female, ...)
Field Note	Visible notes
Identifier?	If the variable is a patient identifier write 'y'
Branching Logic (Show field only if...)	Any branching logic
Required Field?	If the field is required write 'y'

Data Dictionary


CSV

	A	B	C	D	E	F
1	Variable / Field Name	Form Name	Section Header	Field Type	Field Label	Choices, Calculations, OR Slider Labels
2	study_id	demographics		text	Study ID	
3	date_enrolled	demographics	Consent Information	text	Date subject signed consent	
4	patient_document	demographics		file	Upload the patient's consent form	
5	first_name	demographics	Contact Information	text	First Name	
6	last_name	demographics		text	Last Name	
7	address	demographics		notes	Street, City, State, ZIP	
8	telephone_1	demographics		text	Phone number	
9	email	demographics		text	E-mail	
10	dob	demographics		text	Date of birth	
11	age	demographics		calc	Age (years)	rounddown(datediff([dob], 'today', 'y'))
12	ethnicity	demographics		radio	Ethnicity	0, Hispanic or Latino 1, NOT Hispanic or Latino 2, Unknown / M
13	race	demographics		dropdown	Race	0, American Indian/Alaska Native 1, Asian 2, Native Hawaiian
14	gender	demographics		radio	Gender	0, Female 1, Male 2, Other 3, Prefer not to say
15	given_birth	demographics		yesno	Has the patient given birth before?	
16	num_children	demographics		text	How many times has the patient given birth?	
17	gym	demographics	Please provide the patient's	checkbox	Gym (Weight Training)	0, Monday 1, Tuesday 2, Wednesday 3, Thursday 4, Friday
18	aerobics	demographics		checkbox	Aerobics	0, Monday 1, Tuesday 2, Wednesday 3, Thursday 4, Friday
19	eat	demographics		checkbox	Eat Out (Dinner/Lunch)	0, Monday 1, Tuesday 2, Wednesday 3, Thursday 4, Friday
20	drink	demographics		checkbox	Drink (Alcoholic Beverages)	0, Monday 1, Tuesday 2, Wednesday 3, Thursday 4, Friday
21	specify_mood	demographics	Other information	slider	Specify the patient's mood	Very sad Indifferent Very happy
22	meds	demographics		checkbox	Is patient taking any of the following medications?	1, Lexapro 2, Celexa 3, Prozac 4, Paxil 5, Zoloft
23	height	demographics		text	Height (cm)	
24	weight	demographics		text	Weight (kilograms)	
25	bmi	demographics		calc	BMI	round((([weight]*10000)/((([height])^(2))).1)
26	comments	demographics	General Comments	notes	Comments	
27	date_visit_b	baseline_data	Baseline Measurements	text	Date of baseline visit	
28	date_blood_b	baseline_data		text	Date blood was drawn	
29	alb_b	baseline_data		text	Serum Albumin (g/dL)	
30	prealb_b	baseline_data		text	Serum Prealbumin (mg/dL)	
31	creat_b	baseline_data		text	Creatinine (mg/dL)	
32	npcr_b	baseline_data		text	Normalized Protein Catabolic Rate (g/kg/d)	
33	chol_b	baseline_data		text	Cholesterol (mg/dL)	
34	transferrin_b	baseline_data		text	Transferrin (mg/dL)	
35	kt_v_b	baseline_data		text	Kt/V	
36	drywt_b	baseline_data		text	Dry weight (kilograms)	

Exercise Data dictionary

1. Export the Data Dictionary from a **NEW** project CLASSIC DATABASE

Steps for making project changes:

- 1.) [Download the current Data Dictionary](#) 
- 2.) Edit the Data Dictionary (see the [Help & FAQ](#) for help)
- 3.) Upload the Data Dictionary using the form below
- 4.) The changes will be made to the project after the Data Dictionary has been checked for errors

2. Change a variable in the data dictionary & save to CSV

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
	Variable / Field Name	Form Name	Section Header	Field Type	Field Label	Choices, Calculations, OR Slider Labels	Field Note	Text Validation Type OR Show Slider Number	Text Validation Min	Text Validation Max	Identifier?	Branching Logic (Show field only if...)	Required Field?	Custom A
1	record_id	my_first_instrument		text	Record ID									
2	gender	my_first_instrument		radio	Gender	h, Male f, Female								
3														
4	maiden_surname	my_first_instrument		text	Maiden surname	h, Male f, Female						[gender] = 'f'		
5	media	my_first_instrument		text		BIOPORTAL-MEDORA								
6														
7														

3. Import the new data dictionary

Upload your Data Dictionary file (CSV file format only)

Format for min/max validation values for date and datetime fields:

Choose the delimiter for the uploaded file:

Parcourir...

Aucun fichier sélectionné.

Upload File



Excel

;

Instrument ZIP



Export 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

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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

Paris Brain Institute
Search, find, cure, for you, with you
Institut du Cerveau et de la Moelle épinière Inserm Cnrs Umr

Projet_test

Project Home Project Setup Online Designer Data Dictionary Codebook

Create snapshot of instruments VIDEO: How to use this page
Last snapshot: 25/06/2020 11:38

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.

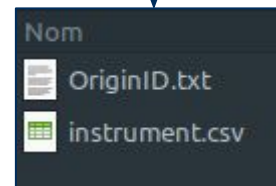
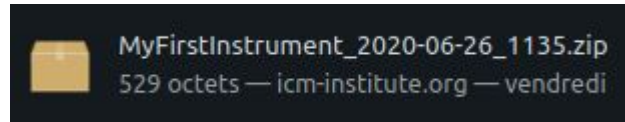
Data Collection Instruments

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	17		Choose action Rename Copy Delete Download instrument ZIP


Actions on instruments

Export an instrument, Zip



	A	B	C	D	E	F	G	H
1	Variable / Field Name	Form Name	Section Header	Field Type	Field Label	Choices, Calculations, OR Slider Labels	Field Note	Text Validation Type OR S
2	record_id	my_first_instrument		text	Record ID			
3								
4								
5								
6								

Import an instrument



Connexion de **test.user** | Déconnexion

Mes Projets

Accueil Projet ou Configuration

REDCap Messenger

État du projet: **Développement**

Collecte de données

Modifier formulaires

Tableau de bord

- Afficher l'état de la collecte de données de tous les enregistrements

Ajouter/modifier enregistrements

- Créer de nouveaux enregistrements ou afficher/modifier des enregistrements existants


Afficher les formulaires

Applications

- Calendrier
- Rapports et exportations
- Outil d'importation de données
- Outil de comparaison de données
- Journalisation
- Journal de commentaires de champ
- Référentiel de fichier
- Droits des utilisateurs et GAD
- Qualité des données
- Application mobile REDCap
- Modules Externes

External Modules

Aide & Renseignements



Brain & Spine Institute

Institut du Cerveau et de la Moelle épinière Inserm Cnrs Umr

Projet_test

Accueil Projet Configuration Concepteur en Ligne Dictionnaire de données

Créer un instantané des formulaires

VIDÉO: Comment utiliser cette page

Dernier instantané : 09/12/2019 14:34

Le concepteur en ligne vous permettra d'apporter des modifications de projet aux champs et aux formulaires très facilement à l'aide de votre navigateur web. NOTE: En statut de développement, tous les changements au niveau des champs prendront immédiatement effet.

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

Nom du formulaire	Champ	Voir PDF	Actions formulaire
My First Instrument	1		Choisir action

Upload instrument ZIP

Select a REDCap instrument ZIP file on your computer that you downloaded from an [external instrument library](#) or from another project/user, and then click the Upload button below. Once it has been successfully uploaded, it will be added as the last data collection instrument in the project.

Browse... No file selected.

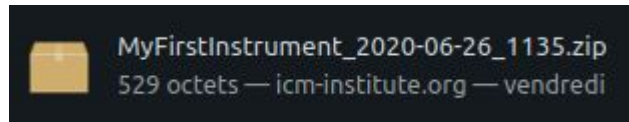
DISCLAIMER: By uploading your instrument ZIP file here, you hereby represent and warrant that to the best of your knowledge, you are not uploading any copyrighted material of a third party to which you do not have an expressed written license or consent from the owner of the said copyright.

Upload instrument ZIP Close

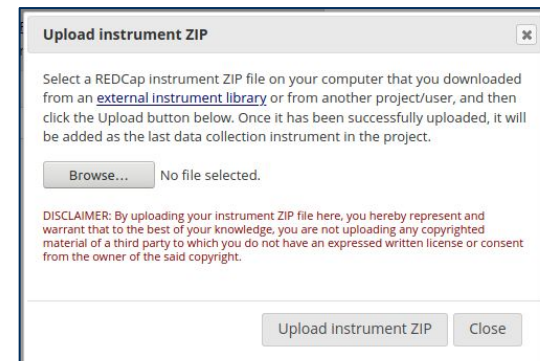
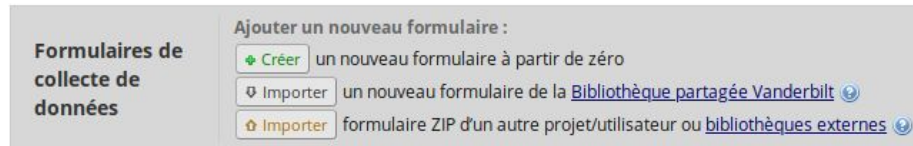
Only CSV, no Excel

Exercise ZIP

1. Export an instrument



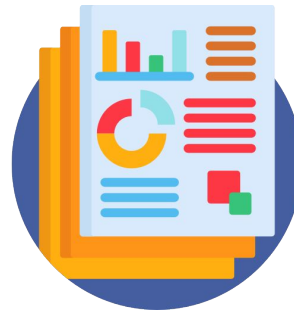
2. Import the new instrument




3. REDCap will rename auto the variables

Export

Outside REDCap



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
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Neuroinformatics

External Modules
Help & Information



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

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):

tab

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



Export Data

Cancel

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**



Understand an Export

	A	B	C	D	E	F	G
1	study id	redcap event name	redcap repeat instrument	redcap repeat instance	date_enrolled	patient_document	first name
2	1	enrollment arm 1					
3	1	visit 1 arm 1					
4	1	visit 2 arm 1					
5	1	unplanned visit arm 1			1		
6	1	unplanned visit arm 1			2		

ID auto
Always

Event name
Longitudinal
& Repeated
longitudinal

instrument name
Repeated &
Longitudinal
repeated

repeat instance
Repeated &
Longitudinal
repeated

Understand an Export

	A	B	C	D	E	F	G
1	study id	redcap event name	redcap repeat instrument	redcap repeat instance	date_enrolled	patient_document	first name
2		1enrollment arm 1					
3		1visit 1 arm 1					
4		1visit 2 arm 1					
5		1unplanned visit arm 1			1		
6		1unplanned visit arm 1			2		

	Classic	Repeated	Longitudinal	Longitudinal Repeated
Record ID	X	X	X	X
Event name			X	X
Repeat Instrument		X		X
Repeat Instance		X		X

Understand an Export

	A	B	C	D	E	F	G
1	study id	redcap event name	redcap repeat instrument	redcap_repeat instance	date_enrolled	patient_document	first name
2		1enrollment arm 1					
3		1visit 1 arm 1					
4		1visit 2 arm 1					
5		1unplanned visit arm 1			1		
6		1unplanned visit arm 1			2		

One line per :

- Classic project : Record Id
- Repeated : Record Id & Instrument & Repeat
- Longitudinal : Record Id & Event
- Longitudinal Repeated: Record Id & Instrument & Repeat & Event

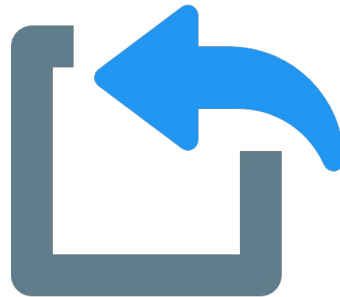
Exercise Export

1. Open Export from :
 - a. Longitudinal project (1 arm)
 - b. Classic Repeated project
 - c. Longitudinal Repeated project

	Classic	Repeated	Longitudinal	Longitudinal Repeated
Record ID	X	X	X	X
Event name			X	X
Repeat Instrument		X		X
Repeat Instance		X		X

2. Understand the files and try to edit some data

Import



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

External Modules

- Shazam Setup

Help & Information

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

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

CSV import

CDISC ODM (XML) import

Instructions:

- 1.) Click the link below to download your data import template as a CSV (comma delimited) file. Save it locally to your computer and then open it to begin filling it with the data you wish to import.
 - Download your Data Import Template (with records in rows)
 - OR
 - Download your Data Import Template (with records in columns)
- 2.) In each column of the Data Import Template file that you downloaded, place the data for each record that you wish to import. Once all your data has been added, save the file.
 - Be sure not to change the Variables/Field Names in the file or an error may occur.
 - All multiple choice fields (e.g., dropdown, radio) must have the raw coded value (rather than the choice label) entered in those cells, or else it cannot be processed. These can be found in the [Codebook](#).
 - Any empty rows or columns in the file can be safely deleted before importing the file. Doing this reduces the upload processing time, especially for large projects.
- 3.) Click the 'Browse' or 'Choose File' button below to select the file on your computer, and upload it by clicking the 'Upload File' button.
- 4.) Once your file has been uploaded, the data will NOT be immediately imported but will be displayed and checked for errors to ensure that all the data is in correct format before it is finally imported into the project.

Import template

Record format: The file to be uploaded has its records stored as separate

Format for date and datetime values:

Allow blank values to overwrite existing saved values?

Name the imported records automatically (force record auto-numbering) ?

Choose the delimiter for the uploaded file:

Upload your CSV file:





Parcourir...

Aucun fichier sélectionné.

Upload File

File selection

Easier Way to import

1. Export some data first 
2. Look how is structured your CSV export 
3. Edit or create your data 
4. Import it back ! 

Choose a file

How to import records for events:

In order to import records for longitudinal projects such as this one, you must use the '**redcap_event_name**' field in your data import file, in which you will provide a **unique event name** for each record. This will tell it which event that the data belongs to for that record. A list of all the unique names are listed on the [Define My Events](#) page. If the 'redcap_event_name' field is not specified for every record being imported, it will display an error.

Record format: The file to be uploaded has its records stored as separate

Format for date and datetime values:

Allow blank values to overwrite existing saved values?

Name the imported records automatically (force record auto-numbering) ?

Choose the delimiter for the uploaded file:

 **Upload your CSV file:**

Aucun fichier sélectionné.



pre-Import report

Data Import Tool

Record format: The file to be uploaded has its records stored as separate

Format for date and datetime values:

Allow blank values to overwrite existing saved values?

Name the imported records automatically (force record auto-numbering)

☒ **Upload your CSV file:**

Aucun fichier sélectionné.

✓ **Your document was uploaded successfully and is ready for review.**

You are now required to view the Data Display Table below to approve all the data before it is officially imported into the project. Follow the instructions below.

No error in the file

Instructions for Data Review

The data you uploaded from the file is displayed in the Data Display Table below. Please inspect it carefully to ensure that it is all correct. After reviewing it, **click the 'Import Data' button at the bottom of this page** to import this data into the project.

KEY for Data Display Table below

Black text = New Data

Gray text = Existing data (will not change)

(Red text) = Data that will be overwritten

Red box = error

Orange box = warning

Colors for the report **below**

pre-Import report

DATA DISPLAY TABLE										
record_id	redcap_data_access_group	dob	text	first_letter	date	note	drop_down	radio_button	multiple_checkbox__0	multi
1 (existing record)	test1				2019-05-27 (2020-05-27)				0	0
2 (existing record)	test1				2020-05-28				0	0
3 (new record)	test1				2020-03-18				0	0
38-1 (existing record)	test1				2020-03-18				0	0
38-2 (existing record)	test1		text		2020-03-02				0	0
38-3 (existing record)	test1								0	0
38-4 (existing record)	test1	1996-01-01			2020-03-10				0	0
38-5 (existing record)	test1								0	0
38-6 (existing record)	test1								0	0

Replacing a value !
(replaced value)

Creating a value !
(new record)

Value already in REDCap
Nothing is done !

Import repeat*

💡 TIP: If importing repeating instances for a repeating event or repeating instrument, you may auto-number the instances by providing a value of '**new**' for the 'redcap_repeat_instance' field in the dataset you are importing. This is useful because it allows you to import such data without the need to determine how many instances already exist for a given repeating event/instance prior to the import.

Use 'new' in repeat instance column to create new instance

Create a data row

	A	B	C	D	E	F	G
1	study_id	redcap_event_name	redcap_repeat_instrument	redcap_repeat_instance	date_enrolled	patient_document	first_name
2	1	enrollment_arm_1					
3	1	visit_1_arm_1					
4	1	visit_2_arm_1					
5	1	unplanned_visit_arm_1			1		
6	1	unplanned_visit_arm_1			2		

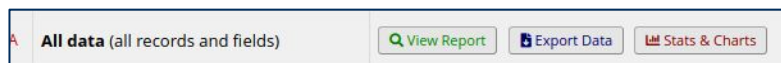
To create a new data in longitudinal and repeat instrument :

- Create a new record_id or select auto-numbering
- Create the correct event name
- Create the instrument name (if needed)
- Create the repeat instance (or 'new' to auto number)

Name the imported records automatically (force record auto-numbering) ?

Exercise Import

1. Take a Data Export from Longitudinal repeated



2. Create a new record, a new data in an event and a new repeat.

study id	redcap event name	redcap repeat instrument	redcap repeat instance
1	enrollment arm 1		
1	visit 1 arm 1		
1	visit 2 arm 1		
1	unplanned visit arm 1		1
1	unplanned visit arm 1		2

new for the 'redcap_repeat_instance'

3. Import the CSV

Record format: The file to be uploaded has its records stored as separate

Format for date and datetime values:

Allow blank values to overwrite existing saved values?

Name the imported records automatically (force record auto-numbering) ?

Choose the delimiter for the uploaded file:

☒ **Upload your CSV file:**

Aucun fichier sélectionné.

Data Quality

Improving data



Go to Data Quality module

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

Hide data collection instruments

My First Instrument
 Bad Fields
 My First Instrument 05034f
 E-Consent

Applications

Alerts & Notifications
 Calendar
 Data Exports, Reports, and Stats
 Data Import Tool
 Data Comparison Tool
 Logging
 File Repository
 User Rights and DAGs
 Customize · Manage Locking/E-signatures
Data Quality and Resolve Issues
 API and API Playground
 REDCap Mobile App
 External Modules
 Neuroinformatics

Reports Search Organize Edit

test
 test2

External Modules

Big Data Import
 Custom Template Engine

Institut du Cerveau et de la Moelle épinière Inserm Cnrs Umr

TEST_Mathias

Data Quality

Find Issues

Resolve Issues **2**

Resolution Metrics

This module will allow you to execute data quality rules upon your project data to check for discrepancies in your data. Listed below are some pre-defined data rules that you may utilize and run. You may also create your own rules or edit, delete, or reorder the rules you have already created. To find discrepancies for a given rule, simply click the Execute button next to it, or click the Execute All Rules button to fire all the rules at once. It will provide you with a total number of discrepancies found for each rule and will allow you to view the details of those discrepancies by clicking the View link next to each. [Read more detailed instructions.](#)

Data Quality Rules

Processing Complete!

Execute rules:

All

All except A&B


All custom

Clear

Apply to: -- All records --

Rule #	Rule Name	Rule Logic (Show discrepancy only if...)	Real-time execution ?	Total Discrepancies	Test1	test2	Test3	Test4	Delete rule?
A	Blank values*	-		Execute					
B	Blank values* (required fields only)	-		Execute					
C	Field validation errors (incorrect data type)	-		Execute					
D	Field validation errors (out of range)	-		Execute					
E	Outliers for numerical fields (numbers, integers, sliders, calc fields)**	-		Execute					
F	Hidden fields that contain values***	-		Execute					
G	Multiple choice fields with invalid values	-		Execute					
H	Incorrect values for calculated fields	-		Execute					
I	Fields containing "missing data codes"	-		Execute					
1	radio button yes et yes/no à yes	[radio_button]=0 and [yes_no]=1		1 view	1	0	0	0	×
<div> <input type="text"/> <input type="text"/> <input type="checkbox"/> </div> <div> Add Enter descriptive name for new rule (e.g., Participants below age 18) </div> <div> Enter logic for new rule (e.g., [age] < 18) How do I use special functions? </div> <div> Execute in real time on data entry forms ? </div>									

Export & Import Rules !

Data Quality Rules						
<div>  Upload or download Data Quality Rules ▾ </div> <div> ✓ Processing Complete! Execute rules: All All except A&B Clear </div> <div> Apply to: -- All records -- ▾ </div>						
Rule #	Rule Name	Rule Logic (Show discrepancy only if...)	Real-time execution ?	Total Discrepancies	Delete rule?	
A	Blank values*	-		106	export	view
B	Blank values* (required fields only)	-		Execute		
C	Field validation errors (incorrect data type)	-		Execute		
D	Field validation errors (out of range)	-		Execute		
E	Outliers for numerical fields (numbers, integers, sliders, calc fields)**	-		Execute		

Exercise Data Quality

1. Execute some rules

A	Blank values*		106
---	---------------	--	-----

2. Try View this rule

106	export	view
-----	------------------------	----------------------

3. Create a new rule [my_variable]="'" and view results

Add	<input type="text"/>	<input type="text"/>
	Enter descriptive name for new rule (e.g., Participants below age 18)	Enter logic for new rule (e.g., [age] < 18)

To do !

✓ Account manager

✓ Reminders

Design

✓ Piping

✓ Smart variables

✓ Advanced Calculated Fields

✓ Advanced Branching logic

✓ Action Tags*

✓ Field embedding*

Structure

✓ Longitudinal & Events

✓ Repetitions

✓ Surveys

Monitoring

✓ CSV* & Data Dictionary

✓ Export

✓ Importing Data

✓ Data quality

Other

□ Alerts and Notifications

□ Data Access Groups

□ External modules

□ Conclusion

* *Newest features*


Alerte & Notifications

Alert !



Create new alert ✕

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

Title of this alert: 

👉 STEP 1: Triggering the Alert

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

B) Trigger the alert...

when is saved with any form status


C) Trigger Limit: Trigger the alert...

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

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

🕒 STEP 2: Set the Alert Schedule

When to send the alert?

- ☒ Send immediately
- ☐ Send on next at time 
- ☐ Send the alert days hours minutes
after 
- ☐ Send at exact date/time:  

Send it how many times?

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

Alert expiration:

(optional)

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

STEP 3: Message Settings

Alert Type:

- ☒  Email
 ☐  SMS Text Message
 ☐  Voice Call

NOTE: If you wish to send alerts as SMS Messages or Voice Calls, read about enabling the Twilio Telephony Services on the Project Setup page or ask an administrator.

Email From:

* must provide value

Email To:

* must provide value

[+ Show more options](#)


 Or manually enter emails:











Subject:















* must provide value

Message:

* must provide value

☒ Prevent piping of data for Identifier fields 

Paragraph
 










In the subject or message, you may use  Piping and  Smart Variables

Example: Hi [first_name]! Please complete this survey: [survey-link:followup_survey]

Exercise Alert

1. Create an alert to send you an email when a record is created

A) How will this alert be triggered?

☒ When a record is saved on a specific form/survey*

☐ When a record is saved on a specific form/survey with conditional logic*

☐ Using conditional logic during a data import or data entry

B) Trigger the alert...

when is saved with any form status

C) Trigger Limit: Trigger the alert...

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

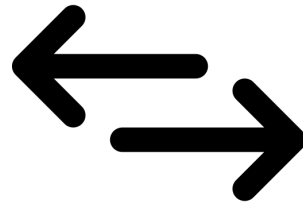
* The alert will not be re-triggered if the form/survey is saved again, unless it is set to send Every time in Step 2 below.

2. Create a record

3. Check your emails

DAG switcher

Multicentric



Attribute multiple DAG to a user

⚙ DAG Switcher: Enable multiple Data Access Groups for users

Display options: ☒ Rows are DAGs ☐ Rows are Users

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

Show entries

Data Access Groups	Users	
	mathias.antunes	test.user
[No Assignment]	<input type="checkbox"/>	<input type="checkbox"/>
DAG1	<input type="checkbox"/>	<input checked="" type="checkbox"/>
DAG2	<input type="checkbox"/>	<input checked="" type="checkbox"/>
DAG3	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Attribute multiple DAG to a user

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 — DAG1

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

Applications

Current Data Access Group: DAG1 [Switch](#)

Longitudinal Database (1 arm) PID 19

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

Project status: [Development](#) Completed steps **0** of **8**

Main project settings

Not started

[I'm done!](#)

[Enable](#) [Disable](#)

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

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

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

Switch Data Access Group ✕

Select the Data Access Group to which you would like to switch:

DAG2

[Switch](#) [Cancel](#)

Exercise DAG

1. Access the DAG switch page

 **DAG Switcher:** Enable multiple Data Access Groups for users

Display options: ☒ Rows are DAGs
☐ Rows are Users

2. Add test.user & Create 3 DAGs

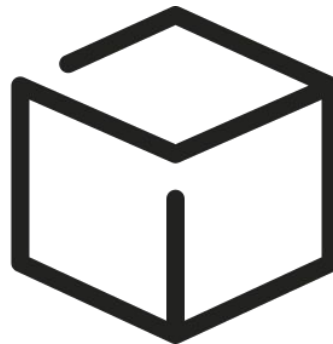
Data Access Groups	
DAG1	
DAG2	
DAG3	


3. Add test.user to 3 DAGs

[No Assignment]	<input type="checkbox"/>	<input type="checkbox"/>
DAG1	<input type="checkbox"/>	<input checked="" type="checkbox"/>
DAG2	<input type="checkbox"/>	<input checked="" type="checkbox"/>
DAG3	<input type="checkbox"/>	<input checked="" type="checkbox"/>

External modules

Extend 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

- [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](#)
- [Data Quality](#)
- [REDCap Mobile App](#)
- External Modules**

External Modules

- [Search Dashboard](#)
- [Shazam Setup](#)

Classic Database PID 30

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

Orca Search Module - v2.3.3 Discoverable A configurable, searchable, and performant, list dashboard View Documentation	Configure Disable
Shazam - v1.3.9 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	

Available Modules

Form Render Skip Logic - v3.3.11 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 - v2.3.3 Discoverable

A configurable, searchable, and performant, list dashboard

[View Documentation](#)

Enable

Simple Ontology Module - v0.4 Discoverable

This module provides site wide ontology lookup, and was written to test the ontology provider mechanism.

[View Documentation](#)

Enable

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

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>	Increment within DAG using part of D ▼
Specify the characters to extract from DAG full name: <small>* must provide value</small>	First two characters ▼
Specify the character(s) to use as separator between DAG part and incrementing part (e.g. "-"; can be blank):	-
Specify the length of the incrementing part (will begin at 1 and be left-padded with zeros, overflows to additional digits): <small>* must provide value</small>	3 digits 001 - 999, 1000, 1001, ... ▼

Examples:

DAG names: "Royal Children's RCH", "Children's Hospital Westmead CHW"
 Settings: Last 3 chars; - separator; 3 incrementing digits
 Auto-numbering: RCH-001, RCH-002, ...; CHW-001, CHW-002, ...

DAG names: "11 RCH", "12 CHW"
 Settings: First 2 chars; no separator; 4 incrementing digits
 Auto-numbering: 110001, 110002, ...; 120001, 120002, ...

Cancel Save

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

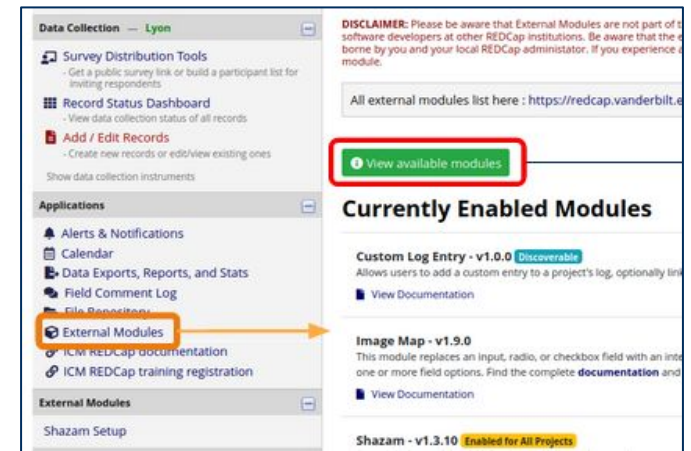
+ Add new record

Displaying: Instrument status only | Lock status only | All status types

Study ID	Demographics	Baseline Data	Month 1 Data	Month 2 Data	Month 3 Data	Completion Data
Ly-001						
Ly-002						

Exercise

1. Activate the module :
 - Custom Record Auto-numbering - v1.0.2



2. Create a custom ID : like "Training_001"

Padded integer increment with prefix

Projectname_

3 digits 001 - 999, 1000, 1001, ...

3. Create a Patient with "Add New Record"

Done !

- ✓ Account manager
- ✓ Reminders

Design

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

Structure

- ✓ Longitudinal & Events
- ✓ Repetitions
- ✓ Surveys

Monitoring

- ✓ CSV* & Data Dictionary
- ✓ Export
- ✓ Importing Data
- ✓ Data quality

Other

- ✓ Alerts and Notifications
- ✓ Data Access Groups
- ✓ External modules
- Wooclap

* *Newest features*

Votre vote wooclap s'affichera ici



Installez l'extension
Chrome ou **Firefox**



Assurez-vous d'être en
mode présentation

wooclap

Votre vote wooclap s'affichera ici



Installez l'extension
Chrome ou **Firefox**



Assurez-vous d'être en
mode présentation

wooclap

Votre vote wooclap s'affichera ici



Installez l'extension
Chrome ou **Firefox**



Assurez-vous d'être en
mode présentation

wooclap

Votre vote wooclap s'affichera ici



Installez l'extension
Chrome ou **Firefox**



Assurez-vous d'être en
mode présentation

wooclap

Votre vote wooclap s'affichera ici



Installez l'extension
Chrome ou **Firefox**



Assurez-vous d'être en
mode présentation

wooclap

Votre vote wooclap s'affichera ici



Installez l'extension
Chrome ou **Firefox**



Assurez-vous d'être en
mode présentation

wooclap

Votre vote wooclap s'affichera ici



Installez l'extension
Chrome ou **Firefox**



Assurez-vous d'être en
mode présentation

wooclap

Votre vote wooclap s'affichera ici



Installez l'extension
Chrome ou **Firefox**



Assurez-vous d'être en
mode présentation

wooclap

Votre vote wooclap s'affichera ici



Installez l'extension
Chrome ou **Firefox**



Assurez-vous d'être en
mode présentation

wooclap

Votre vote wooclap s'affichera ici



Installez l'extension
Chrome ou **Firefox**



Assurez-vous d'être en
mode présentation

wooclap

Votre vote wooclap s'affichera ici



Installez l'extension
Chrome ou **Firefox**



Assurez-vous d'être en
mode présentation

wooclap

Votre vote wooclap s'affichera ici



Installez l'extension
Chrome ou **Firefox**



Assurez-vous d'être en
mode présentation

wooclap

Votre vote wooclap s'affichera ici



Installez l'extension
Chrome ou **Firefox**



Assurez-vous d'être en
mode présentation

wooclap

Thank you !

Any questions ?

Trainings !

DAC Team

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/>

ALL ICM procedure :

<https://icm.dokmee.com/>