

# Using REDCap for Clinical Data Management

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## Purpose

Through this hands on session, delegates will learn how to:

- create a project
- add fields
- add branching logic
- validate fields
- enter/export data
- create reports

## Pre-requisites

Delegates have been given access to the REDCap training server

## Create a new project

1. Log into REDCap <http://sscmredcap-training.epi.bris.ac.uk/redcap/> and select 'Create New Project' tab

The screenshot shows the 'Create a new REDCap Project' form. At the top is a navigation bar with links: Home, My Projects, Create New Project (active), Training Resources, Help & FAQ, Send-It, and Control Center. The main heading is 'Create a new REDCap Project'. Below it, a message states: 'You may begin the creation of a new REDCap project on your own by completing the form below and clicking the Create Project button at the bottom.'

The form contains the following fields and options:

- Project title:** A text input field with a placeholder 'Title to be displayed on project webpage'.
- Purpose of this project:** A dropdown menu with '---- Select One ----'.
- Project notes (optional):** A text area with a placeholder 'Comments describing the project's use or purpose for documentation purposes only.'
- Start project from scratch or begin with a template?** Three radio buttons:
  - ☒ Create an empty project (blank slate)
  - ☐ Upload a REDCap project XML file (CDISC ODM format) [?]
  - ☐ Use a template (choose one below)

Below these options is a section titled 'Choose a project template' (comes pre-filled with fields, forms/surveys, and other settings) with a link 'Add templates (super users only)'. It contains a table with the following data:

| select template       | Template title (sorted by title) | Template description  |
|-----------------------|----------------------------------|---|
| <input type="radio"/> | Classic Database                 | Contains six data entry forms, including forms for demography and baseline data, three monthly data forms, and concludes with a completion data form.   |
| <input type="radio"/> | Human Cancer Tissue Biobank      | Contains five data entry forms for collecting and tracking information for cancer tissue.   |
| <input type="radio"/> | Longitudinal Database (1 arm)    | Contains nine data entry forms (beginning with a demography form) for collecting data longitudinally over eight different events.   |
| <input type="radio"/> | New Project Template             | Standard roles for Data Entry, Statistician and Study Manager are set up.   |
| <input type="radio"/> | Randomized Clinical Trial        | Contains seven data entry forms for collecting data for a randomized clinical trial. Includes a short demographics form followed by a form where randomization is performed. An example randomization model has already been set up.... Show more |

At the bottom of the form are two buttons: 'Create Project' and 'Cancel'.

For the project title, enter **Practice Project - [your name]**, under **Purpose**, select **Just for Fun** and under **Start project from scratch**, select **Create an empty project**.

The **Project Setup** page will be displayed. Click on **Online designer**.

The screenshot shows the 'Project Setup' page. At the top is a navigation bar with links: Project Home, Project Setup (active), Other Functionality, Project Revision History, and Edit project. Below the navigation bar, the 'Project status' is 'Development' and 'Completed steps 0 of 7'.

The main content area is divided into three sections:

- Main project settings**: A section with a 'Not started' status and an 'I'm done!' button. It contains two 'Enable' buttons and two links: 'Use longitudinal data collection with repeating forms?' and 'Use surveys in this project?'. A link 'VIDEO: How to create and manage a survey' is also present. A button 'Modify project title, purpose, etc.' is at the bottom.
- Design your data collection instruments**: A section with a 'Not started' status and an 'I'm done!' button. It contains a link '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), in which you may use either method or both. Quick links: Download PDF of all data collection instruments OR Download the current Data Dictionary'. Below this, there are two buttons: 'Go to Online Designer' (highlighted with a red box) and 'Data Dictionary'. A link 'You may also browse for pre-built data collection instruments in the REDCap Shared Library' is also present. A link 'Have you checked the Check For Identifiers page to ensure all identifier fields have been tagged?' is at the bottom.
- Enable optional modules and customizations**: A section with a 'Not started' status and an 'I'm done!' button. It contains a link 'Auto-numbering for records'.

2. In the **Online Designer**, a new instrument called **My First Instrument** has been automatically created for you. Rename this to **Forma Fitness Sport Club Registration** by using the **Rename** option in the **Choose action** button.
3. Click on the instrument name to start editing. The questionnaire has one field, **Record\_Id**.

## Adding fields

1. Use **Add a field** or **Add Matrix of Fields** to add fields

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: 

---- Select a Type of Field ----

Field Label

---- Select a Type of Field ----

Text Box (Short Text)

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

Slider / Visual Analog Scale

File Upload (for users to upload files)

Descriptive Text (with optional Image/File Attachment)

Begin New Section (with optional text)

Dynamic Query (SQL)

Field Name (utilized during data export)

☐ Enable auto naming of variable based upon its Field Label?  
Letters, numbers, and underscores

Validation? (optional)

Field Name

----

Required? ☒ No ☐ Yes

☐ If field is blank

Identifier? ☒ No ☐ Yes

☐ 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

Looking for Branching Logic? Try clicking the  icon for this field after clicking the Save or Cancel button below.

Save

Cancel

### Notes on field types

**Section Header** - Use the **Begin New Section** field type. **A quirky REDCap behaviour: you need to create at least one field for the section before you create a Section Header.**

For short **text**, **dates** and **numbers** – Use the **Text Box** field type. Add field **Validation** for dates and numbers. Use the **Notes Box** field type for recording paragraphs.

**Yes - No, True - False** – these fields will provide two radio button options.

Use the **Slider** field for a visual analogue scale.

Use **Labels displayed above slider** to add information and a range to a **Slider** field.

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: Slider / Visual Analog Scale

Field Label [How to use Piping](#)

Labels displayed above slider:

Left-hand label (if any):

Middle label (if any):

Right-hand label (if any):

Display number value (0-100)? ☐

Variable Name (utilized during data export)

ONLY letters, numbers, and underscores ☐ Enable auto naming of variable based upon its Field Label?

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

Looking for Branching Logic? Try clicking the [icon](#) for this field after clicking the Save or Cancel button below.

Save

Cancel

Use the **Multiple choice** or **Checkboxes** field types to choose **Single/Multiple choice**.

Add options in the **Choices** box. First add the code number to be used in the statistical analysis, followed by a comma and the text to be displayed for the user.

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: Multiple Choice - Drop-down List (Single Answer)

Field Label [How to use Piping](#)

Choices (one choice per line)

1, Option A  
2, Option B  
3, Option C

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

Variable Name (utilized during data export)

ONLY letters, numbers, and underscores ☐ Enable auto naming of variable based upon its Field Label?

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

Looking for Branching Logic? Try clicking the [icon](#) for this field after clicking the Save or Cancel button below.

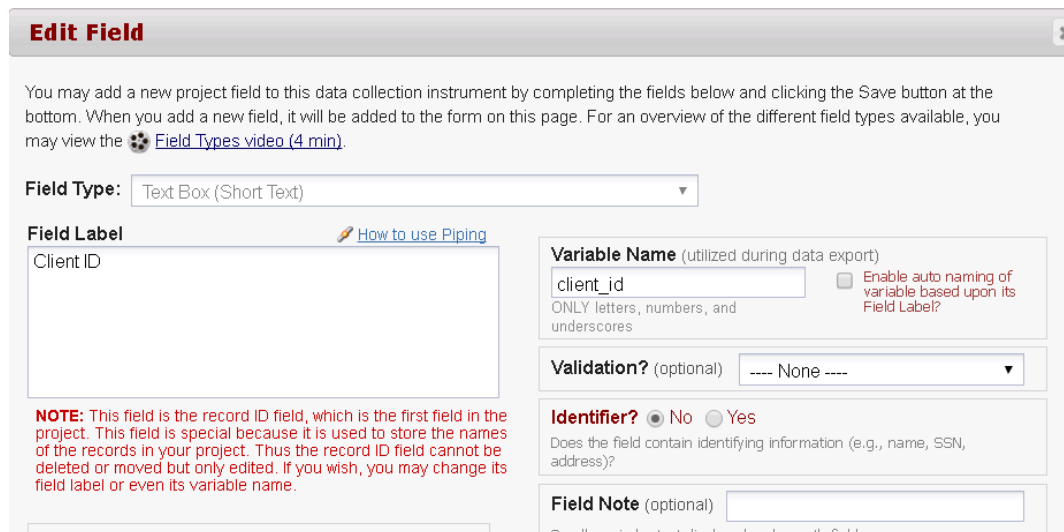
Save

Cancel

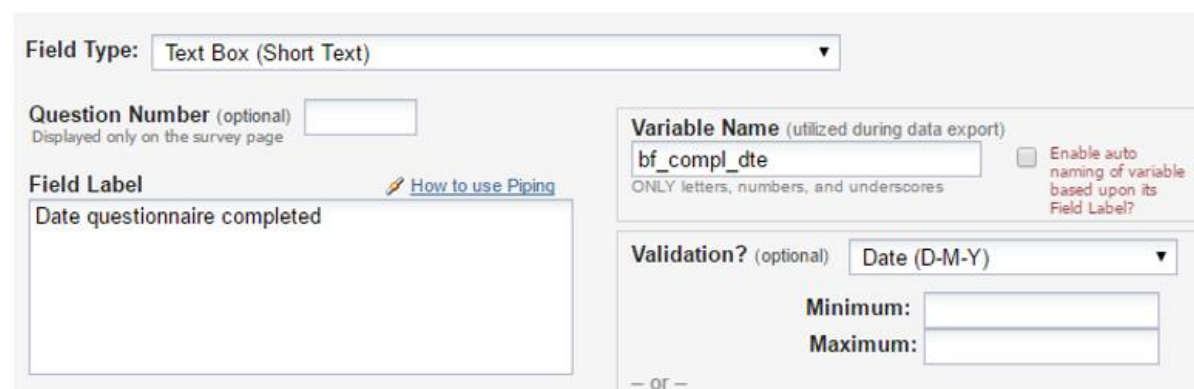
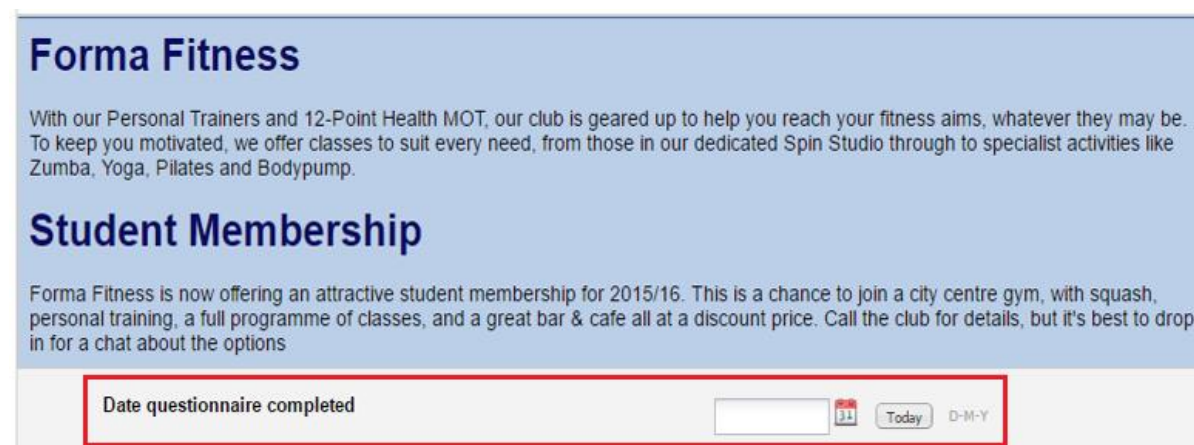
## Exercise 1

Create the **Forma Fitness Sport Club Registration** form.

Using the edit button , rename **Record ID** as **Client Id** then **Save**.



Use the **Add Field** button to set up each field. Note that a **Section Header** cannot be created until there is at least one variable field following it, so begin by creating the **Date questionnaire completed** field.



Prefix variable names with **bf\_** (booking form) followed by the question description (e.g. bf\_compl\_dte, bf\_gender, etc. Note that **variable names cannot contain spaces or uppercase characters**.

REDCap supports the use of HTML tags such as **<span style><i> <b>** to format text in a field label. Several styles are used in this course booklet and you can request a more comprehensive document at the end of the course.

For the **Forma Fitness** title use tags to change the formatting of the text.

Field Type: **Begin New Section (with optional text)**

Field Label [How to use Piping](#)

```
<span style="font-size: 20pt; color: #0B0B61">Forma Fitness </span>
<span style="font-weight:normal;">
With our Personal Trainers and 12-Point Health
MOT, our club is geared up to help you reach your
fitness aims, whatever they may be. To keep you
motivated, we offer classes to suit every need, from
```

As before, the Section Header cannot be created until there is a variable field following it so create the **Gender** field before the section header **Your Details**.

**Your Details**

Gender ☐ Male ☒ Female [reset](#)

If you are/may be pregnant, please let us know so we can tailor your training accordingly

Age group ☐ < 18 ☐ 19 to 25 ☐ 26 to 35 ☐ 36 to 45 ☐ 46 to 55 ☐ Over 55 [reset](#)

Occupation

ID Photo. Please upload a passport photo [Upload document](#)

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

Question Number (optional)   
Displayed only on the survey page

Field Label [How to use Piping](#)

Gender

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

1, Male  
2, Female

Variable Name (utilized during data export)  
**bf\_gender** ☐ Enable auto naming of variable based upon its Field Label?  
ONLY letters, numbers, and underscores

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)

**Field Type:** Begin New Section (with optional text)

**Field Label** [How to use Piping](#)

<span style="font-size: 16pt; color:#0B0B61;">Your Details</span>

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

**Question Number** (optional)   
Displayed only on the survey page

**Field Label** [How to use Piping](#)

If you are/may be pregnant, please let us know so we can tailor your training accordingly

**Variable Name** (utilized during data export)  
bf\_pregnant\_lbl  
ONLY letters, numbers, and underscores

Optional file attachment, image, audio, or video

[Embed an external video \(YouTube\)](#)

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

**Question Number** (optional)   
Displayed only on the survey page

**Field Label** [How to use Piping](#)

Age group

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

1, < 18  
2, 19 to 25  
3, 26 to 35  
4, 36 to 45  
5, 46 to 55  
6, Over 55

**Variable Name** (utilized during data export)  
bf\_age  
ONLY letters, numbers, and underscores

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

**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

**Field Type:** Text Box (Short Text) ▼

**Question Number** (optional)   
Displayed only on the survey page

**Field Label** [How to use Piping](#)

Occupation

**Variable Name** (utilized during data export)  
bf\_occupation  
ONLY letters, numbers, and underscores

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

**Field Type:** File Upload (for users to upload files) ▼

**Question Number** (optional)   
Displayed only on the survey page

**Field Label** [How to use Piping](#)

ID Photo. Please upload a passport photo

**Variable Name** (utilized during data export)  
bf\_photo  
ONLY letters, numbers, and underscores

☐

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

## Sports and Physical Activity Participation

In order to provide you with the best option, we are interested in your current level of activity.

Do you take part on regular sports or physical activity (at least once a week)?

- ☒ Yes  
☐ No

reset

Do you attend a gym or leisure centre?

- ☐ Yes  
☐ No

reset

On how many occasions do you participate in sport and physical activity a week?

- ☐ 0  
☐ 1 - 2  
☐ 3 - 4  
☐ 5 - 6  
☐ 7 - 8  
☐ More than 8

reset

Do you currently participate in any of the following activities? (Please select all that apply)

- ☐ Jog  
☐ Run  
☐ Cycle  
☐ football  
☐ Basketball  
☐ Tennis  
☐ Badminton  
☐ Weights  
☐ Yoga  
☒ Other

If other, please specify

Field Type:

Field Label

[How to use Piping](#)

Sports and Physical Activity Participation  
In order to provide you with the best option, we are interested in your current level of activity.

Field Type:

Question Number (optional)

Displayed only on the survey page

Field Label

[How to use Piping](#)

Do you take part on regular sports or physical activity (at least once a week)?

Choices (not modifiable)

1, Yes  
0, No

Variable Name (utilized during data export)

ONLY letters, numbers, and underscores

Required?\* ☒ No ☐ Yes

\* Prompt if field is blank

Identifier? ☒ No ☐ Yes

Does the field contain identifying information (e.g. name, email, phone number)?

Custom Alignment

Align the position of the field on the page

Field Note (optional)

Small reminder text displayed underneath field

**Field Type:** Yes - No

**Question Number** (optional)  
Displayed only on the survey page

**Field Label** [How to use Piping](#)  
Do you attend a gym or leisure centre?

**Choices (not modifiable)**  
1, Yes  
0, No

**Variable Name** (utilized during data export)  
bf\_gym  
ONLY letters, numbers, and underscores ☐ Enable auto naming of variable based upon its Field Label

**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

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

**Question Number** (optional)  
Displayed only on the survey page

**Field Label** [How to use Piping](#)  
On how many occasions do you participate in sport and physical activity a week?

**Choices (one choice per line)** [Copy existing choices](#)  
0, 0  
1, 1 - 2  
2, 3 - 4  
3, 5 - 6  
4, 7 - 8  
5, More than 8

**Variable Name** (utilized during data export)  
bf\_freq  
ONLY letters, numbers, and underscores ☐ Enable auto naming of variable based upon its Field Label

**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

**Field Type:** Checkboxes (Multiple Answers)

**Question Number** (optional)  
Displayed only on the survey page

**Field Label** [How to use Piping](#)  
Do you currently participate in any of the following activities? (Please select all that apply)

**Choices (one choice per line)** [Copy existing choices](#)  
1, Jog  
2, Run  
3, Cycle  
4, football  
5, Basketball  
6, Tennis  
7, Badminton

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

**Variable Name** (utilized during data export)  
bf\_act  
ONLY letters, numbers, and underscores ☐ Enable auto naming of variable based upon its Field Label

**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

**Field Type:** Text Box (Short Text)

**Question Number** (optional)  
Displayed only on the survey page

**Field Label** [How to use Piping](#)  
If other, please specify

**Variable Name** (utilized during data export)  
bf\_othr  
ONLY letters, numbers, and underscores

**Validation?** (optional) ---- Non  
-- or --

## Nutrition

Would you like nutritional advice as part of your PT package?

☒ Yes

☐ No

reset

On a regular week, please select the option that fits best

|   | Never                 | 1-2 days              | 3-4 days              | 5-6 days              | Every day             |
|---|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| I have breakfast                              | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I eat at least 5 portions of fruit/vegetables | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I eat meat                                    | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I eat fish                                    | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I eat sweet/sugary snacks                     | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I eat crisps/chips                            | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

We will be sending you a food diary for you to complete over one week

Field Type:

Field Label

[How to use Piping](#)

`<span style="font-size: 16pt; color: #0B0B61">Nutrition</span>`

Field Type:

Question Number (optional)

Displayed only on the survey page

Field Label

[How to use Piping](#)

Would you like nutritional advice as part of your PT package?

Variable Name (utilized during)

ONLY letters, numbers, and underscores

Required?\* ☒ No ☐ Yes

\* Prompt if field is blank

**Matrix Header Text (optional)**

On a regular week, please select the option that fits best

---

**Matrix Rows**  
Each row represents a different field with its own label and variable name.

| Field Label                                   | Variable Name<br><small>ONLY letters, numbers, and underscores</small> | Question Number<br><small>(optional)</small> |
|---|--|--|
| I have breakfast                              | bf_nut_bkfast  |  |
| I eat at least 5 portions of fruit/vegetables | bf_nut_fruit   |  |
| I eat meat                                    | bf_nut_meat  |  |
| I eat fish                                    | bf_nut_fish  |  |
| I eat sweet/sugary snacks                     | bf_nut_sug   |  |
| I eat crisps/chips                            | bf_nut_potatoes  |  |

[Add another row](#)

---

**Matrix Column Choices**

Choices (one choice per line)

- 0, Never
- 1, 1-2 days
- 2, 3-4 days
- 4, 5-6 days
- 5, Every day

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

**Other Matrix Info**

**Answer Format:**  
Single Answer (Radio Buttons) ▼

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

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

---

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

**Question Number (optional)**   
Displayed only on the survey page

**Field Label** [How to use Piping](#)  
We will be sending you a food diary for you to complete over one week

**Variable Name (utilized during data export)**  
bf\_food\_lbl  
ONLY letters, numbers, and underscores

**Optional file attachment**

If required, enter validation for text fields, for example allowing only numbers or dates to be accepted. Minimum and maximum values can be set so that in a question such as **How many days would you like to train per week?** validation could be fixed to allow only integers between 1 and 7.

**Field Type:** Text Box (Short Text) ▼

**Question Number (optional)**   
Displayed only on the survey page

**Field Label** [How to use Piping](#)  
How many days would you like to train per week?

**Variable Name (utilized during data export)**  
bf\_no\_days  
ONLY letters, numbers, and underscores ☐ Enable auto naming of variable based upon its Field Label?

**Validation? (optional)** Integer ▼

**Minimum:** 1

**Maximum:** 7

## Supplements

Do you take any supplements?

☒ Yes  
☐ No

reset

How many supplements do you take per day?

5

Supplement 1 - Name

Supplement 2 - Name

Supplement 3 - Name

Supplement 4 - Name

Supplement 5 - Name

Field Type: **Begin New Section (with optional text)**

Field Label [How to use Piping](#)

<span style="font-size: 16pt; color: #0B0B61">Supplements</span>

Field Type: Yes - No

Question Number (optional)  
Displayed only on the survey page

Field Label [How to use Piping](#)

Do you take any supplements?

Choices (not modifiable)

1, Yes  
0, No

Variable Name (utilized during data export)  
bf\_supplements ☐ Enable auto naming of variable based upon its Field Label?  
ONLY letters, numbers, and underscores

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

Field Type: Text Box (Short Text)

Question Number (optional)  
Displayed only on the survey page

Field Label [How to use Piping](#)

How many supplements do you take per day?

Variable Name (utilized during data export)  
bf\_suppl\_day ☐ Enable auto naming of variable based upon its Field Label?  
ONLY letters, numbers, and underscores

Validation? (optional) Integer  
Minimum: 0  
Maximum: 5  
— or —

Field Type: Text Box (Short Text)

Question Number (optional)  
Displayed only on the survey page

Field Label [How to use Piping](#)

Supplement 1 - Name

Variable Name (utilized during data export)  
bf\_suppl\_nme1 ☐ Enable auto naming of variable based upon its Field Label?  
ONLY letters, numbers, and underscores

Validation? (optional) --- None ---  
— or —

Repeat for Supplements 2 to 5.

## Training availability

Please tick all that apply

|   | Mondays                  | Tuesdays                 | Wednesdays               | Thursdays                | Fridays                  | Saturdays                | Sundays                  |
|---|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Before 9.00 am                                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 9.00 to 12.00                                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 12.00 to 17.00                                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 17.00 to 19.00                                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 19.00 to 21.00 pm                               | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| How many days would you like to train per week? | <input type="text"/>     |                          |                          |                          |                          |                          |                          |
| How many hours would you like to train per day? | <input type="text"/>     |                          |                          |                          |                          |                          |                          |
| Please enter comments/training goals here       | <div><div></div></div>   |                          |                          |                          |                          |                          |                          |

Expand

### Matrix Header Text (optional)

Training availability  
<i>Please tick all that apply</i>

### Matrix Rows

Each row represents a different field with its own label and variable name.

☐ Enable auto naming of variable

| Field Label       | Variable Name<br><small>ONLY letters, numbers, and underscores</small> | Question Number<br><small>(optional)</small> | Required?*               | P                        |
|-------------------|--|--|--------------------------|--------------------------|
| Before 9.00 am    | bf_9   |  | <input type="checkbox"/> | <input type="checkbox"/> |
| 9.00 to 12.00     | bf_12  |  | <input type="checkbox"/> | <input type="checkbox"/> |
| 12.00 to 17.00    | bf_17  |  | <input type="checkbox"/> | <input type="checkbox"/> |
| 17.00 to 19.00    | bf_19  |  | <input type="checkbox"/> | <input type="checkbox"/> |
| 19.00 to 21.00 pm | bf_21  |  | <input type="checkbox"/> | <input type="checkbox"/> |

[Add another row](#)

### Matrix Column Choices

Choices (one choice per line)

- 1, Mondays
- 2, Tuesdays
- 3, Wednesdays
- 4, Thursdays
- 5, Fridays
- 6, Saturdays
- 7, Sundays

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

### Other Matrix Info

Answer Format:

Multiple Answers (Checkboxes) ▼

Ranking:

[What is a ranked matrix of fields?](#)

☐ Allow only 1 choice to be selected per column (radio buttons only)

Matrix group name: ONLY letters, numbers, and underscores

bf\_training\_grp

[What is a matrix group name?](#)

Field Type: **Text Box (Short Text)**

Question Number (optional)   
Displayed only on the survey page

Field Label [How to use Piping](#)  
How many days would you like to train per week?

Variable Name (utilized during data export)  
**bf\_no\_days** ☐ Enable auto naming of variable based upon its Field Label?  
ONLY letters, numbers, and underscores

Validation? (optional) **Integer**

Minimum:   
Maximum:

– or –

Field Type: **Text Box (Short Text)**

Question Number (optional)   
Displayed only on the survey page

Field Label [How to use Piping](#)  
How many hours would you like to train per day?

Variable Name (utilized during data export)  
**bf\_no\_hours** ☐ Enable auto naming of variable based upon its Field Label?  
ONLY letters, numbers, and underscores

Validation? (optional) **Number**

Minimum:   
Maximum:

– or –

Field Type: **Notes Box (Paragraph Text)**

Question Number (optional)   
Displayed only on the survey page

Field Label [How to use Piping](#)  
Please enter comments/training goals here

Variable Name (utilized during data export)  
**bf\_comments** ☐ Enable auto naming of variable based upon its Field Label?  
ONLY letters, numbers, and underscores

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

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

Custom Alignment

## Adding instruments

Once you have completed the **Forma Fitness Sport Club Registration** section, use

the [Return to list of Data Collection Instruments](#) at the top of the screen

A list of all existing instruments will be displayed. Select **Create a new instrument from scratch**.

**Data Collection Instruments**

Add new instrument:

[Create](#) a new instrument from scratch

[Download](#) a new instrument from the REDCap Shared Library [?](#)

## Exercise 2

1. Create a new instrument called **Office Use Only**
2. Replicate the **Office Use Only** form adding appropriate validation.

Variable: client\_id

**Client ID**

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

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

---

Variable: bf\_email

**Email**

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

---

Variable: bf\_phone

**Phone number**

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

---

Variable: bf\_contact

**How would you like us to contact you?**

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

Field Type: **Text Box (Short Text)**

Field Label [How to use Piping](#)  
Email

Variable Name (utilized during data export)  
bf\_email  
ONLY letters, numbers, and underscores ☐ Enable auto naming of variable based upon its Field Label?

Validation? (optional) **Email**  
— or —

Field Type: **Text Box (Short Text)**

Field Label [How to use Piping](#)  
Phone number

Variable Name (utilized during data export)  
bf\_phone  
ONLY letters, numbers, and underscores ☐ Enable auto naming of variable based upon its Field Label?

Validation? (optional) **--- None ---**  
— or —

Field Type: **Multiple Choice - Drop-down List (Single Answer)**

Field Label [How to use Piping](#)  
How would you like us to contact you?

Choices (one choice per line) [Copy existing choices](#)  
1, email  
2, phone  
3, either

☒ Enable auto-complete for this drop-down [How do I manually code the choices?](#)

Variable Name (utilized during data export)  
bf\_contact  
ONLY letters, numbers, and underscores ☐ Enable auto naming of variable based upon its Field Label?

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


## Adding branching logic

Branching Logic may be employed when fields/questions need to be hidden under certain conditions. If branching logic is defined, the field will only be visible if the conditions provided are true (*i.e.* show the field only if...).

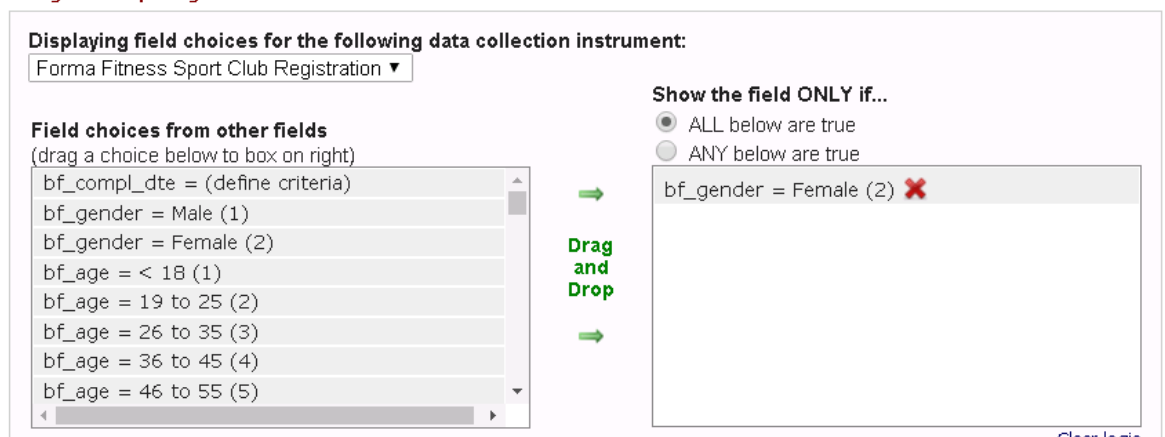
Use the  **Branching Logic** button to add logic to a field.

You may specify the conditions in the Advanced Branching Logic Syntax text box or by choosing the Drag-N-Drop Logic Builder method which allows you to build your logic in a user friendly fashion by simply dragging over the options you want.

### Exercise 3

1. Select the **Forma Fitness Sport Club Registration** form
2. The label **'If you are/may be pregnant, please let us know so we can tailor your training accordingly.'** only needs to be displayed if the answer to the question **'Gender'** is **'Female'**.
3. Use the  **Branching logic button** for this label and use the **Drag-N-Drop** facility to select the logic. E.g. **[bf\_gender] = 'Female'**

#### Drag-N-Drop Logic Builder



Displaying field choices for the following data collection instrument:  
Forma Fitness Sport Club Registration ▼

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

- bf\_compl\_dte = (define criteria)
- bf\_gender = Male (1)
- bf\_gender = Female (2)
- bf\_age = < 18 (1)
- bf\_age = 19 to 25 (2)
- bf\_age = 26 to 35 (3)
- bf\_age = 36 to 45 (4)
- bf\_age = 46 to 55 (5)

**Show the field ONLY if...**

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

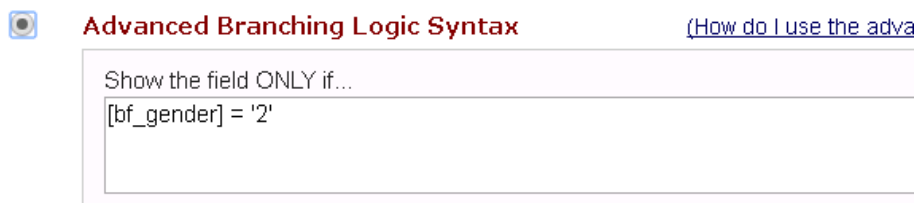
bf\_gender = Female (2) ✖


Drag and Drop

Clear logic

4. Select **Save**

Click on the Branching logic button again to view how REDCap has stored your choice



 **Advanced Branching Logic Syntax** [\(How do I use the adva](#)

Show the field ONLY if...

[bf\_gender] = '2'

REDCap enters the variable name in [ ] and your selection in the **Advance Branching Logic** box. Once you are familiar with this, you can type the logic directly in this box.

5. Repeat the process for the following questions requiring branching logic in the **Forma Fitness Sport Club Registration** example.

Variable: bf\_gym [Branching logic exists]

Do you attend a gym or leisure centre?

☐ Yes  
☐ No

reset

Add Field Add Matrix of Fields

Variable: bf\_freq [Branching logic exists]

On how many occasions do you participate in sport and physical activity a week?

☐ 0  
☐ 1 - 2  
☐ 3 - 4  
☐ 5 - 6  
☐ 7 - 8  
☐ More than 8

reset

Add Field Add Matrix of Fields

Variable: bf\_act [Branching logic exists]

Do you currently participate in any of the following activities? (Please select all that apply)

☐ Jog  
☐ Run  
☐ Cycle  
☐ football  
☐ Basketball  
☐ Tennis  
☐ Badminton  
☐ Weights  
☐ Yoga  
☐ Other

Add Field Add Matrix of Fields

Variable: bf\_othr [Branching logic exists]

If other, please specify

Add Field Add Matrix of Fields

Matrix group: bf\_nut\_grp

On a regular week, please select the option that fits best

Variable: bf\_nut\_bkfst [Branching logic exists]

|                  | Never                 | 1-2 days              | 3-4 days              | 5-6 days              | Every day             |
|------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| I have breakfast | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

reset

Variable: bf\_nut\_fruit [Branching logic exists]

|   |                       |                       |                       |                       |                       |
|---|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| I eat at least 5 portions of fruit/vegetables | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
|---|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|

reset

Variable: bf\_nut\_meat [Branching logic exists]

|            |                       |                       |                       |                       |                       |
|------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| I eat meat | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
|------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|

reset

Variable: bf\_nut\_fish [Branching logic exists]

|            |                       |                       |                       |                       |                       |
|------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| I eat fish | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
|------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|

reset

Variable: bf\_nut\_sug [Branching logic exists]

|                           |                       |                       |                       |                       |                       |
|---------------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| I eat sweet/sugary snacks | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
|---------------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|

reset

Variable: bf\_nut\_potatoes [Branching logic exists]

|                    |                       |                       |                       |                       |                       |
|--------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| I eat crisps/chips | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
|--------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|

reset

Add Field Add Matrix of Fields

Variable: bf\_food\_lbl [Branching logic exists]

We will be sending you a food diary for you to complete over one week

## Advanced branching logic

### Repeating questions a set number of times

Use the 'Forma Fitness Sport Club Registration' form. In this form, we find questions that are repeated a number of times. The number of times these questions are needed is dependent on the answer to a previous question: *e.g. **How many supplements do you take per day?** If the answer is '0', no related questions should be displayed, if the answer is '1', just one related question should be displayed, if '2', two questions and so on.*

### Exercise 4

Select the **Forma Fitness Sport Club Registration** form and add logic to display only the required number of repeating questions

The screenshot displays a form titled 'Forma Fitness Sport Club Registration' with a variable `bf_suppl_day`. The main question is 'How many supplements do you take per day?'. Below it are five repeating questions, each with a variable `bf_suppl_nme1` through `bf_suppl_nme5`. Each question has a label 'Supplement 1 - Name' through 'Supplement 5 - Name'. To the right of each question, there is a box indicating the logic to display it: '[Branching logic exists]'. Arrows point from these boxes to a series of logic rules on the right:

- Logic to display 1 question only: `[bf_suppl_day] > 0`
- Logic to display 2 question only: `[bf_suppl_day] > 1`
- Logic to display 3 question only: `[bf_suppl_day] > 2`
- Logic to display 4 question only: `[bf_suppl_day] > 3`
- Logic to display 5 question only: `[bf_suppl_day] > 4`

**Meeting several conditions** - Branching logic can also be used to display questions/labels depending on the answer to multiple questions.

## Data Entry

To add/edit records, select the **Add/Edit Records** menu under the **Data Collection** group.

**REDCap**

Logged in as maria.baquedano  
Log out

My Projects  
Project Home  
Project Setup  
Project status: Development

**Data Collection** [Edit instruments](#)

Manage Survey Participants  
- Get a public survey link or build a participant list for inviting respondents

Scheduling  
- Generate schedules for the calendar using your defined events

Record Status Dashboard  
- View data collection status of all records

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

Applications  
Calendar

**Add / Edit Records**

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

Total records: 2 / Total survey responses: 1

Choose an existing Patient ID

[Add new record](#)

**Data Search**

Choose a field to search (excludes multiple choice fields)

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

To add a record, if **Enable 'auto-number'** has been selected in the project setup, select **Add new record** button; if **'Enable auto-number'** has not been selected, enter ID in the box and press enter.

To edit an existing record, use the dropdown under **Choose and Existing Client ID**.

*If a project has a large number of records, you can use the **Data Search** facility. You can select a field to search by and start typing in the **Search Query** box. Records that match the criteria will be displayed.*

For **non-longitudinal** projects, when choosing **Add/Edit records**, the first instrument will be displayed ready for input or editing. For **longitudinal** projects, the **Event Grid** will be displayed so that user can select instrument and event to complete.

### Event Grid

The grid below displays the form-by-form progress of data entered into the project for one particular Participant ID for all defined events. You may click on the colored buttons to access that form for that event. If you wish, you may modify the events below by navigating to the [Define My Events](#) page.

#### Legend for status icons:

- Incomplete
- Incomplete (no data saved) ?
- Unverified
- Partial Survey Response
- Complete
- Completed Survey Response

#### Participant ID 1

| Data Collection Instrument | 01 - Baseline (1) | 02 - Visit 2 (2) | 03 - Visit 3 (3) |
|----------------------------|-------------------|------------------|------------------|
| Baseline                   |                   |                  |                  |
| Treatment                  |                   |                  |                  |

## Exercise 5

1. Select **Add/Edit Record** and **Add new record**. The **Office Use Only** form will be displayed. Enter information for this form and then click **Save and go to Next Form** and complete the **Forma Fitness Sport Club Registration** form.
2. Add a few participants. We will use this data to test the Data Export.

**Notice:** Only test data should be added whilst the project is in development status. Once the project instruments have been finalised, the project should be moved to production in preparation for real patient data to be entered. When promoting a project to production, all previously entered data is deleted. See the **Promote a project to production** section, for steps to follow prior to going live.

## Data Export

REDCap allows you to easily export your project data to Microsoft Excel, SAS, Stata, R, or SPSS for analysis. Exporting your data out of REDCap is simple. To get a quick data dump of all records for your project, choose the **Data Exports, Reports and Stats** one-click option.

The screenshot displays the REDCap training course interface. On the left, a sidebar shows the user is logged in as 'maria.baquedano' and provides navigation links for 'My Projects', 'Project Home', 'Project Setup', 'Data Collection' (with an 'Edit instruments' link), and 'Applications'. The 'Applications' section is highlighted with a red box. The main content area features the 'REDCap training course' header, navigation buttons for 'Project Setup', 'Online Designer', and 'Data Dictionary', and a description of the Online Designer tool. The current instrument is 'Baseline', and a form field for 'Patient ID' is shown with a note that it is the record ID field and cannot be deleted or moved.

In the resulting screen, either select the **Export Data** button for a quick download of all current data or select the **Make custom selections** to specify the form(s) for which data is to be downloaded.

Logged in as maria.baquedano  
Log out

My Projects  
Project Home  
Project Setup  
Project status: Development

Data Collection [Edit Instruments](#)

Scheduling  
Generate schedules for the calendar using your defined events

Record Status Dashboard  
View data collection status of all records

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

Applications

- Calendar
- Data Exports, Reports, and Stats
- Data Import Tool
- Data Comparison Tool
- Logging
- Field Comment Log
- File Repository
- User Rights and DAGs
- Record Locking Customization
- E-signature and Locking Mgmt

## REDCap training course

### Data Exports, Reports, and Stats

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

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

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

| My Reports & Exports |  |  |  |                            |
|----------------------|--|--|--|----------------------------|
|                      | Report name                                      | View/Export Options  | Management Options   | Report ID (auto-generated) |
| A                    | All data (all records and fields)                | <a href="#">View Report</a> <a href="#">Export Data</a> <a href="#">Stats &amp; Charts</a> |  |                            |
| B                    | Selected instruments and/or events (all records) | <a href="#">Make custom selections</a>   |  |                            |
| 1                    | ee   | <a href="#">View Report</a> <a href="#">Export Data</a> <a href="#">Stats &amp; Charts</a> | <a href="#">Edit</a> <a href="#">Copy</a> <a href="#">Delete</a> | 8                          |
| 2                    | rr   | <a href="#">View Report</a> <a href="#">Export Data</a> <a href="#">Stats &amp; Charts</a> | <a href="#">Edit</a> <a href="#">Copy</a> <a href="#">Delete</a> | 9                          |
| 3                    | e  | <a href="#">View Report</a> <a href="#">Export Data</a> <a href="#">Stats &amp; Charts</a> | <a href="#">Edit</a> <a href="#">Copy</a> <a href="#">Delete</a> | 10                         |

[+ Create New Report](#)

Use Reports to download only specific fields across the dataset

Once you have made your selections, click **Export Data**. The **Exporting Data** dialog will be displayed. Select the required format and follow the on-screen instructions.

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

Select your export settings, which includes the export format (Excel/CSV, SAS, SPSS, R, Stata) and whether or not 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

#### 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](#)

#### Additional export options

☒ Export Data Access Group name for each record (if record is in a group)?

Export Data

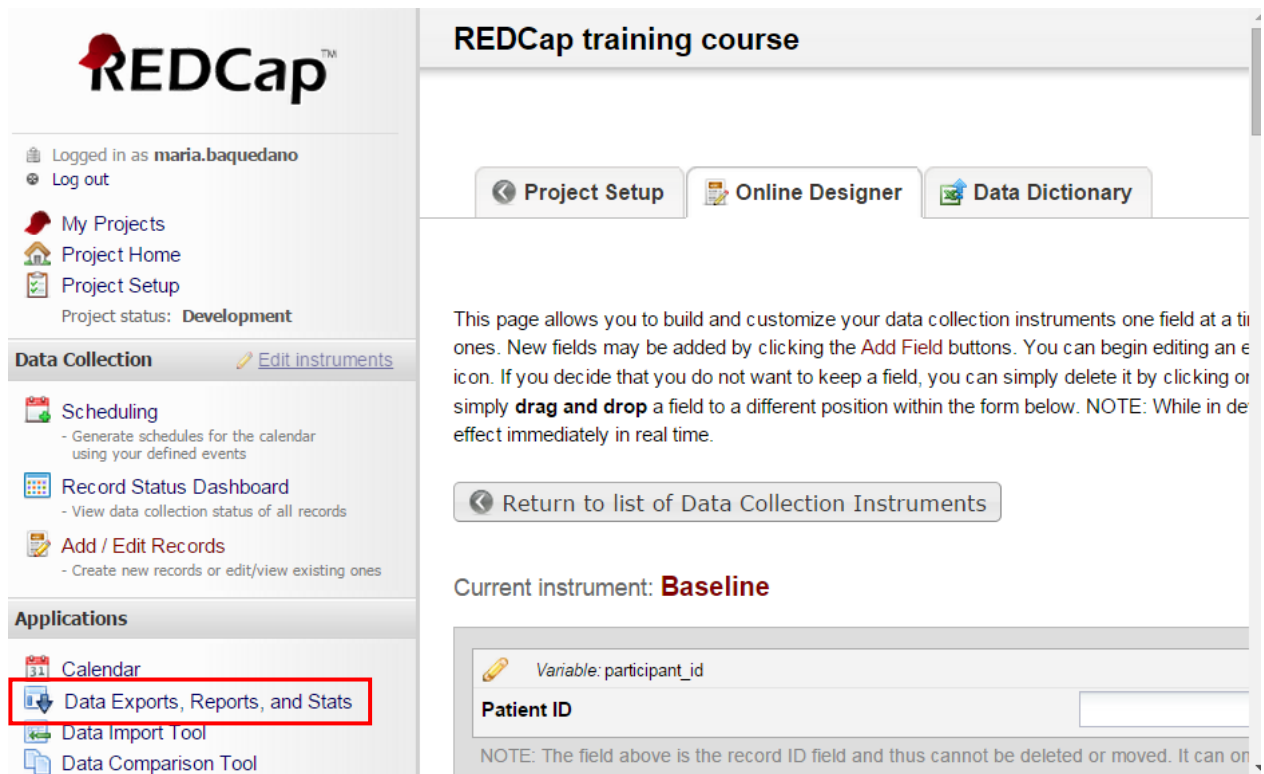
Cancel

When downloading data to SPSS/STATA, make sure the 'Export survey identifier field and survey timestamps field(s)' is NOT selected. This only applies to projects where surveys have been enabled.

## Report Builder

You may use this page to build and save custom reports, which will query the project in real time and display the resulting data in a table format. Once created, you may view your reports at any time as well as modify or delete them. Your saved reports will be displayed on the left-hand menu as links, which can be clicked to display the report.

1. Select **Data Exports, Reports and Stats** on the left hand side menus



The screenshot shows the REDCap web interface. On the left sidebar, the 'Data Exports, Reports, and Stats' menu item is highlighted with a red box. The main content area is titled 'REDCap training course' and contains buttons for 'Project Setup', 'Online Designer', and 'Data Dictionary'. Below these buttons, there is a text block explaining the functionality of the page and a button to 'Return to list of Data Collection Instruments'. The current instrument is listed as 'Baseline'. At the bottom, there is a form for 'Patient ID' with a note indicating it is the record ID field and cannot be deleted or moved.

2. Click the **Create New Report** button. In the resulting screen, add the report name and select all required fields and filters. Save the report

*The report will be listed under **Reports**. Click on the link to **View** the report*

### Exercise 6

Create a new report to extract the participant IDs and email addresses for all male active clients (currently attending a gym or leisure centre).


|                        |              |
|------------------------|--------------|
| <b>Name of Report:</b> | Active males |
|------------------------|--------------|

#### STEP 1

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

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

#### STEP 2

|  |                                   |   |   |
|--|-----------------------------------|---|---|
|  <b>Fields to include in report</b> |                                   |  Quick Add | Add all fields from selected instrument: <span>— choose instrument —</span>                                     |
| Field 1  | client_id "Client ID"             |            | Instrument Office use only;  |
| Field 2  | bf_email "Email"                  |            | Instrument Office use only;  |
| Field 3  | Type variable name or field label |            |   |

 **Additional fields to include in report (optional)**

☐ Include the survey identifier field and survey timestamp field(s)?

#### STEP 3

|  |   |   |  |
|--|---|---|--|
|  <b>Filters (optional)</b> |   | <a href="#">How to use filters and AND/OR logic</a>                                 |  |
| Filter 1   | bf_gender "Gender"                        |  | Operator / Value: = Male  |
| AND                       |   |   |  |
| Filter 2   | bf_gym "Do you attend a gym or leisure c" |  | = Yes                     |
| AND                       |   |   |  |
| Filter 3   | Type variable name or field label         |  | = <input type="text"/>    |

Reports can be **ordered** by selected fields (up to 3 fields).

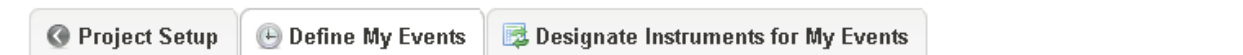
For complex projects switch to **Use Advanced logic**.

## APPENDIX I – Advanced REDCap features

### Setting a Project as Longitudinal

1. Select the **Project Setup** tab and click on **Enable ‘Use longitudinal data collection with repeating forms’** under **Main project settings**
2. Select **Define my events** under **Define your events and designate instruments for them**

*The Define My Events tab is displayed*



This application allows you to define 'events' for your project that allow 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 your project, such as a participant visit or a task to be performed. After events have been defined, you will need to designate the data collection instruments that you wish to utilize for any or all events, thus allowing you to use a form for multiple events for the same project record. You may **group your events into 'arms'**, in which you may have one or more arms/groups for your project. Each arm can have as many events as you wish. You may use the table below to create new events and/or arms, or modify existing ones. (One arm and one event will be initially defined as the default for all projects.)

#### STEP #1:

To add new events below, provide an **Event Name** for that event, and then click the *Add new event*. Once events have been added, you can easily change their order by dragging and dropping the event using the up-down arrow icon on the far left for a given row in the table.

#### STEP #2:

Once you have defined your events on this page, you may navigate to the [Designate Instruments for My Events](#) page, where you may select which data collection instruments that you wish to utilize for each event you defined.



|  |   | Event #                         | Event Name | Unique event name<br>(auto-generated) |
|--|---|---------------------------------|------------|---------------------------------------|
|  |   | 1                               | e1         | e1_arm_1                              |
|  |   | 2                               | e2         | e2_arm_1                              |
|  |   | 3                               | e3         | e3_arm_1                              |
| <input type="button" value="Add new event"/> |   | <input type="text"/>            |            |                                       |
|  |   | Descriptive name for this event |            |                                       |

3. To add an event, enter data under **Event Name** and press **Enter**
4. Select the **Designate Instruments for My Event** tab and choose **Begin Editing**  
*e.g. Select the events for each of your instruments as per image below and click Save*

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.

Begin Editing

Save







| Data Collection Instrument                     | e1<br>(1) | e2<br>(2) | e3<br>(3) | e4<br>(4) | e5<br>(5) |
|--|-----------|-----------|-----------|-----------|-----------|
| Office use only                                | ✓         |           |           |           |           |
| Forma Fitness Sport Club Registration (survey) | ✓         | ✓         | ✓         |           |           |

When adding participant's information, REDCap will allow multiple completion of questionnaires assigned to more than one event.

## Event Grid

The grid below displays the form-by-form progress of data entered into the project for one particular Client ID for all defined events. You may click on the colored buttons to access that form for that event. If you wish, you may modify the events below by navigating to the [Define My Events](#) page.

### Legend for status icons:

-  Incomplete
-  Incomplete (no data saved) ?
-  Unverified
-  Partial Survey Response
-  Complete
-  Completed Survey Response

### Client ID mai 1

| Data Collection Instrument                     | e1<br>(1)   | e2<br>(2)   | e3<br>(3)   | e4<br>(4) | e5<br>(5) |
|--|---|---|---|-----------|-----------|
| Office use only                                |  |   |   |           |           |
| Forma Fitness Sport Club Registration (survey) |  |  |  |           |           |



Lock all forms across all Events



Unlock all forms across all Events

## Data dictionary

Project fields can be created or amended using either the **Online Designer** or 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 to REDCap to commit the changes to your project.

To view the data dictionary, select '**Edit Instruments**' and choose the '**Data Dictionary**' tab. In the resulting screen click the [Download the current Data Dictionary](#)

An Excel compatible file will be downloaded. Open it to view formatting

| Variable / Field Name | Form Name                          | Section Header | Field Type | Field Label   | Choices             | Field Note | Text Valid         | Text Valid Identifier |
|-----------------------|------------------------------------|----------------|------------|---|---------------------|------------|--------------------|-----------------------|
| 1 client_id           | office_use_only                    |                | text       | Client ID   |                     |            |                    |                       |
| 3 bf_email            | office_use_only                    |                | text       | Email   |                     |            | email              |                       |
| 4 bf_phone            | office_use_only                    |                | text       | Phone number  |                     |            |                    |                       |
| 5 bf_contact          | office_use_only                    |                | dropdown   | How would 1, email   2, phone   | autocomple          |            |                    |                       |
| 6 bf_compl_dte        | forma_fitness_sport_club_registrat |                | text       | Date questionnaire completed date_dmy   |                     |            |                    |                       |
| 7 bf_gender           | forma_fitness_sport_club_registrat |                | radio      | Gender  | 1, Male   2, Female |            |                    |                       |
| 8 bf_pregnant_lbl     | forma_fitness_sport_club_registrat |                | descriptiv | If you are/may be pregnant, please let us know so we can tailor your trai               | [bf_gender] = '2'   |            |                    |                       |
| 9 bf_age              | forma_fitness_sport_club_registrat |                | radio      | Age group: 1, < 18   2, 19 to 25   3, 26 to 35   4, 36 to 45   5, 46 to 55   6, Over 55 |                     |            |                    |                       |
| 10 bf_occupation      | forma_fitness_sport_club_registrat |                | text       | Occupation  |                     |            |                    |                       |
| 11 bf_photo           | forma_fitness_sport_club_registrat |                | file       | ID Photo. Please upload a passport photo  |                     |            |                    |                       |
| 12 bf_reg             | forma_fitness_sport_club_registrat |                | yesno      | Do you take part on regular sports or physical activity (at least once a week)?         |                     |            |                    |                       |
| 13 bf_gym             | forma_fitness_sport_club_registrat |                | yesno      | Do you attend a gym or leisure centre?  |                     |            | [bf_reg] = '1'     |                       |
| 14 bf_freq            | forma_fitness_sport_club_registrat |                | radio      | On how m 0, 0   1, 1 - 2   2, 3 - 4   3, 5 - 6   4, 7 - 8   5, More than 8              |                     |            | [bf_reg] = '1'     |                       |
| 15 bf_act             | forma_fitness_sport_club_registrat |                | checkbox   | Do you cu 1, Jog   2, Run   3, Cycle   4, football   5, Basketball   6, Tennis          |                     |            | [bf_reg] = 1       |                       |
| 16 bf_othr            | forma_fitness_sport_club_registrat |                | text       | If other, please specify  |                     |            | [bf_act(10)] = '1' |                       |
| 17 bf_suppl_nme1      | forma_fitness_sport_club_registrat |                | text       | Would you like nutritional advice as part of your PT package?                           |                     |            |                    |                       |

The Data Dictionary is the preferred method for adding repetitive questions or changing branching logic (e.g. Supplement Name).

| Variable / Field Name | Form Name                          | Section Header | Field Type | Field Label  | Choices  | Field Note | Text Valid         | Text Valid Identifier |
|-----------------------|------------------------------------|----------------|------------|--|----------|------------|--------------------|-----------------------|
| 23 bf_nut_potatoes    | forma_fitness_sport_club_registrat |                | radio      | I eat crisp: 0, Never   1, 1-2 days   2, 3-4 days   4, 5-6 days   5, Every day                               |          |            | [bf_nutrition] = 1 | bf_nut_grp            |
| 24 bf_food_lbl        | forma_fitness_sport_club_registrat |                | descriptiv | We will be sending you a food diary for you to complete over one week  |          |            | [bf_nutrition] = 1 |                       |
| 25 bf_supplements     | forma_fitness_sport_club_registrat |                | yesno      | Do you take any supplements?   |          |            |                    |                       |
| 26 bf_suppl_day       | forma_fitness_sport_club_registrat |                | text       | How many supplements do you integer  | 0, 5     |            |                    |                       |
| 27 bf_suppl_nme1      | forma_fitness_sport_club_registrat |                | text       | Supplement 1 - Name  |          |            | [bf_suppl_day] > 0 |                       |
| 28 bf_suppl_nme2      | forma_fitness_sport_club_registrat |                | text       | Supplement 2 - Name  |          |            | [bf_suppl_day] > 1 |                       |
| 29 bf_suppl_nme3      | forma_fitness_sport_club_registrat |                | text       | Supplement 3 - Name  |          |            | [bf_suppl_day] > 2 |                       |
| 30 bf_suppl_nme4      | forma_fitness_sport_club_registrat |                | text       | Supplement 4 - Name  |          |            | [bf_suppl_day] > 3 |                       |
| 31 bf_suppl_nme5      | forma_fitness_sport_club_registrat |                | text       | Supplement 5 - Name  |          |            | [bf_suppl_day] > 4 |                       |
| 32 bf_9               | forma_fitness_sport_club_registrat |                | checkbox   | Before 9.0, 1, Mondays   2, Tuesdays   3, Wednesdays   4, Thursdays   5, Fridays   6, Saturdays   7, Sundays |          |            |                    | bf_training_grp       |
| 33 bf_12              | forma_fitness_sport_club_registrat |                | checkbox   | 9.00 to 12.1, Mondays   2, Tuesdays   3, Wednesdays   4, Thursdays   5, Fridays   6, Saturdays   7, Sundays  |          |            |                    | bf_training_grp       |
| 34 bf_17              | forma_fitness_sport_club_registrat |                | checkbox   | 12.00 to 1.1, Mondays   2, Tuesdays   3, Wednesdays   4, Thursdays   5, Fridays   6, Saturdays   7, Sundays  |          |            |                    | bf_training_grp       |
| 35 bf_19              | forma_fitness_sport_club_registrat |                | checkbox   | 17.00 to 1.1, Mondays   2, Tuesdays   3, Wednesdays   4, Thursdays   5, Fridays   6, Saturdays   7, Sundays  |          |            |                    | bf_training_grp       |
| 36 bf_21              | forma_fitness_sport_club_registrat |                | checkbox   | 19.00 to 2.1, Mondays   2, Tuesdays   3, Wednesdays   4, Thursdays   5, Fridays   6, Saturdays   7, Sundays  |          |            |                    | bf_training_grp       |
| 37 bf_no_days         | forma_fitness_sport_club_registrat |                | text       | How many days would you like integer   | 1, 7     |            |                    |                       |
| 38 bf_no_hours        | forma_fitness_sport_club_registrat |                | text       | How many hours would you like number   | 0.5, 3.5 |            |                    |                       |
| 39 bf_comments        | forma_fitness_sport_club_registrat |                | text       | Please enter comments/training goals here  |          |            |                    |                       |

The first question could be set up in the Online designer. Then, download the data dictionary, insert as many rows as required, copy the question and paste as many times as required. You will need to amend variable names, labels and logic.

Save the file and upload to REDCap by clicking the '**Choose file**' button

Logged in as **maria.baquedano**  
Log out

**My Projects**  
Project Home  
Project Setup

Project status: **Development**

**Data Collection** [Edit instruments](#)

**Manage Survey Participants**  
- Get a public survey link or build a participant list for inviting respondents

**Scheduling**  
- Generate schedules for the calendar using your defined events

**Record Status Dashboard**  
- View data collection status of all records

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

**Applications**

- Calendar
- Data Export Tool
- Data Import Tool
- Data Comparison Tool
- Logging
- Field Comment Log
- File Repository
- User Rights and DAGs
- Record Locking Customization
- E-signature and Locking Mgmt
- Randomization
- Graphical Data View & Stats
- Data Quality
- API

## REDCap training course

Project Setup | Online Designer | Upload Data Dictionary

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

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 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.

**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](#)
- 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)**

No file chosen

## Promote project to production

Once the instruments have been finalised and tested, the project is ready to move to Production status.

1. Access the Project Setup tab and set status to **I'm done!** under all sections in the **Project Setup**.
2. Select **Move the Project to Production**

Project status: **Development** Completed steps **7 of 8**

**Main project settings**

Complete!  ☒ Use longitudinal data collection with repeating forms? [?](#)

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

Not complete?

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

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

Go to  or

You may also browse [Data Dictionary examples](#)

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

**Define your event**

Complete! Create events for re-use

Go to

**Enable optional m**

Complete!  ☒ Auto-number  ☒ Scheduling  ☒ Randomization  ☒ Designation

Not complete?

**Set up project bo**

Complete! You may create custom links or privileges to do so. Even behavior.

Go to

**User Rights and Permissions**

You may grant other users access to this project or edit the user privileges of current users on this project by navigating to the User Rights page. Additionally, if you wish to limit user access to certain records/responses

**Request Admin to Move to Production Status?**

Are you sure you wish to leave the DEVELOPMENT stage? If you proceed, the project will be moved to PRODUCTION status so that real data may be collected. By leaving the checkbox checked below, all current collected data, calendar events, and uploaded documents will be deleted, otherwise all will remain untouched as the project is moved to production.

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

☒ Delete ALL data, calendar events, documents uploaded for records/responses, and (if applicable) survey responses?

Once in production, you will not be able to edit the project fields in real time anymore. However, you can make edits in Draft Mode, which will then need to be approved by a REDCap administrator before taking effect.

**NOTE:**  
Since only REDCap administrators can move a project to production, clicking the button below will send a request to a REDCap admin, who will move it to production status for you. An email will be sent to your address (maijes@virginmedia.com) when this has been done.

*The **Request Admin to Move to Production Status** dialog box will be displayed. Follow the instructions to **check for Identifiers** and select **Yes, Request Admin to move to production status**. An email will be sent to the REDCap team so they can approve the project and promote it to production.*


## Using Surveys

Using surveys is a simple and fast way to collect responses from participants. You can enable one or multiple instruments within your projects as surveys. You can then send survey links via email to your participants.

1. Select the **Project Setup** menu and click **Enable the Use surveys** in this project.
2. Under '**Enable optional modules..**' select **Designate an email field to use....**' And select the email field in the Office use only form.
3. Access the **Online designer** and enable all required instruments as survey. For our example, enable the Forma Fitness Sport Club Registration as survey.

*The Survey settings page will be displayed. Amend the Survey Instructions and Survey Acknowledgement text as required (e.g. add signature and contact details).*


Some of your survey questions use branching logic.

**Question Display Format**  
(One page or multiple pages?)

One section per page (multiple pages) ▼


☒ Display page numbers at top of survey page

☐ Hide the 'Previous Page' button (i.e., Back button) on the survey page  
(prevents respondents from going back to previous pages)

**For 'Required' fields, display the red 'must provide value' text on the survey page?**

Yes ▼

If 'No', then it will NOT display the following text beneath all 'Required' fields: \* must provide value

**Allow survey respondents to view aggregate survey results after completing the survey?**  
After completing the survey, participants can view ALL responses in aggregate graphical format and/or as descriptive statistics. Also, the individual respondent's answers will be highlighted in the results.


Disabled ▼

**Additional settings:**

10 ▼

Minimum number of responses required before participants are allowed to view aggregate data (recommended = 10).


☐ Do not show plots for questions lacking diversity in response values?  
([What does this mean?](#))

**Text-To-Speech functionality**  
(Allows text on survey page to be read audibly to participants.)  
When enabled, icons will be displayed next to all text on the survey page, and when clicked, the text will be read out loud to the participant (must have computer speakers turned on).

Disabled ▼

**NOTICE:** All text that is spoken is sent to a service hosted at Vanderbilt University that utilizes the AT&T Text-to-Speech API service. Be advised that if the survey utilizes piping, for privacy concerns, data piped from Identifier fields will \*not\* be sent to the service with the rest of the text but will instead be redacted.  
[Super users: How to disable this feature](#)


**Survey Access:**

**Survey Expiration (optional)**  
(Time after which the survey will become inactive.)

31

M/D/Y H:M

The time must be for the time zone **Europe/London**, in which the current time is **04/05/2016 15:34**.

**Allow 'Save & Return Later' option for respondents?**  
(Allow respondents to leave the survey and return later.)

No ▼

☐ Allow respondents to return and modify completed responses?

*Save the changes.*

- In the **Online Designer**, select **Automated Invitations** and choose Modify invitation for event 1

| Instrument name                       | Fields | View PDF | Enabled as survey   | Instrument actions         | Survey-related options  |
|---------------------------------------|--------|----------|---------------------|----------------------------|---|
| Office use only                       | 4      |          | <span>Enable</span> | <span>Choose action</span> |   |
| Forma Fitness Sport Club Registration | 34     |          | <span>Enable</span> | <span>Choose action</span> | <span>Survey settings</span> <span>Automated Invitations</span> |

- Complete fields as per example below and select Save

**Info**  
**Survey title:** Forma Fitness Sport Club Registration  
**Event:** e1

**STEP 1: Compose message**  
**From:**   
(select any project user to be the "Sender")  
**To:**   
**Subject:**   

Hi  
Thanks for your interest in joining our gym. Using the link at the bottom of this email, please could you complete our gym membership questionnaire to help us tailor your training package?  
Looking forward to welcoming you to Forma Fitness  
The Membership team

**NOTE:** The survey link will be automatically included in the email message.

You may use HTML formatting in the email message: <b> bold, <u> underline, <i> italics, <a href="..."> link, etc.

[How to use Piping in the survey invitation](#)

**STEP 2: Conditions**  
**Specify conditions for sending invitations:**  
☐ When the following survey is completed:  
  
AND  
☒ When the following logic becomes true:  


(e.g., [enrollment\_arm\_1][age] > 30 and [enrollment\_arm\_1][gender] = "1")

[How do I use special functions?](#)

☒ Ensure logic is still true before sending invitation?

**STEP 3: When to send invitations AFTER conditions are met**  
☒ Send immediately  
☐ Send on next  at time  H:M  
☐ Send after lapse of time:  days  hours  minutes  
☐ Send at exact date/time:  M/D/Y H:M

**OPTIONAL: Enable reminders**  
☐ Re-send invitation as a reminder if participant has not responded by a specified time?

**STEP 4: Activated?**  

Activate these automated invitations? In order for automated survey invitations to be sent using these specified conditions, it must be set to Active. You may make them Not Active (and vice versa) at any point in the future.

☒ Active ☐ Not Active

Save Cancel

*Emails can be sent Immediately or as per predefined schedule. A log of sent invitations can be reviewed using the Survey Invitation Log tab.*

- To see this functionality in action, choose Add/Edit Records. Create a new record and add your email address under **Email** in the **Office Use Only** form.

*When you save this form, an email will be sent to you with the link to complete the **Forma Fitness Sport Club Registration** form.*

*The Survey functionality can also be used to send a public/generic URL if anonymous responses are required.*