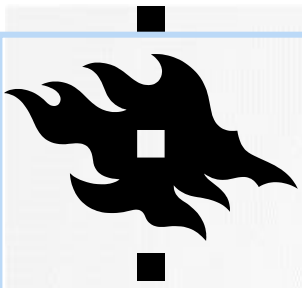


REDCAP TRAINING – OVERVIEW AND BASIC FUNCTIONS

University of Helsinki Data Support

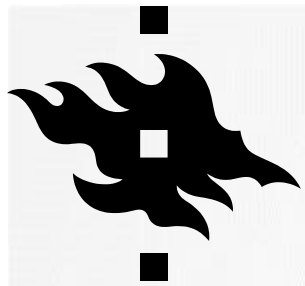




REDCAP TRAINING WELCOME!

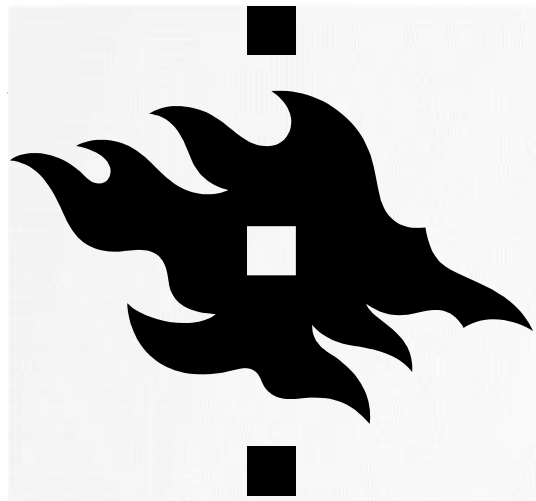
- We start at 14.00 pm
- During the webinar you can ask questions or write comments in the chat.
- You can also ask questions by microphone.
- Otherwise keep your microphone muted
- You can also contact the hosts using private chat messages



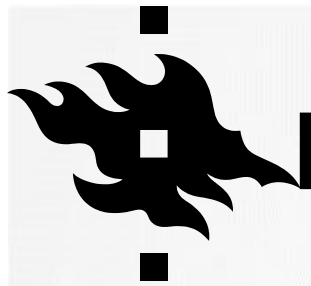


CONTENT OF THE TRAINING

- In this training we will go through the **basic functions** of REDCap:
- How to create a data collection template for your research project
- How to create a survey
- How to test your project
- Capturing data
- How to grant user rights to your REDCap project
- Exporting data to other programs (Excel, R...)



REDCAP AT THE UNIVERSITY OF HELSINKI



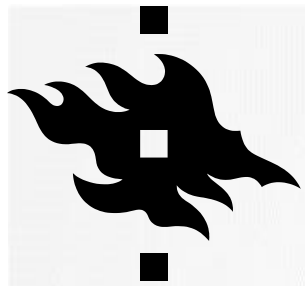
REDCAP TEAM AT THE UNIVERSITY

Library: Iina Hepolehto, Tuija Korhonen, Katri Larmo, Marja Moisio

IT: Kimmo Tykkälä, Antti Jussila

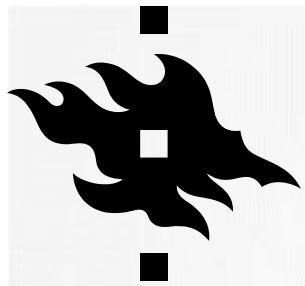
Service address: Redcap-support@helsinki.fi

Send your questions about data management to:
datasupport@helsinki.fi



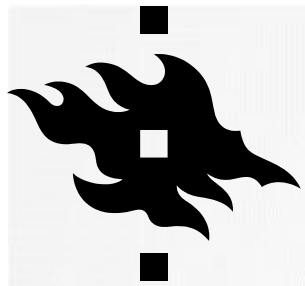
HOW AND WHY REDCAP?

- REDCap (Research Electronic Data Capture) is a secure tool for creating surveys and databases and for collecting data. Developed at Vanderbilt University (Nashville, Tennessee)
- Especially suited for collecting sensitive and personal data.
- Anyone with Univ of Helsinki credentials can access and use REDCap.
- Double authentication – either with Microsoft/Google Authenticator or with a code sent to your email.
- Address: <https://redcap.helsinki.fi/>



WHERE'S THE DATA LOCATED?

- The University of Helsinki's REDCap is installed on the University's own servers.
- Data that is collected in REDCap is stored on the University's own servers.

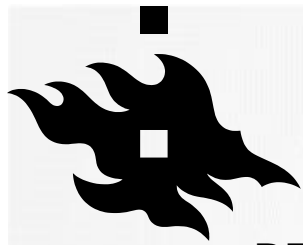


THE MAIN STAGES OF USING REDCAP

- Plan how you will collect data

What? Why? Who? When? How?

- In test stage in REDCap create and test your database or survey thoroughly
 - In test stage/phase you have to thoroughly test all your form, variables, project settings (email, timeframe etc) so that you don't have to make any changes during data collection (production stage).
- In the production stage you collect and review data.
- The analysis stage takes place outside of REDCap. You can export data directly from REDCap into Excel, R, Stata, SAS, SPSS and also into PDFs if needed



DATA PROTECTION

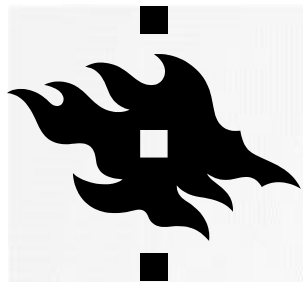
- REDCap is originally created for American universities where all research that contains personal data has to receive ethical approval from an institutional review board. This demand is on REDCap's login page and unfortunately we cannot change this text to correspond to the requirements at the University of Helsinki.

Instead we have the following text when you create a project:

- Please make sure that:
- You have approval from your Ethical Review Board (**if required**)
- <https://www.tenk.fi/en/ethical-review-in-finland>
- You have done the Data Protection Preliminary Evaluation. See the [Data protection guide for researchers](#) in Flamma
<https://flamma.helsinki.fi/en/group/tutkimuksen-tuki/tutkimuksen-tietosuoja-asiat>
 - You have done a Data Protection Impact Assessment (**if required**)
- You have a Data Protection Notice (Privacy Notice) for informing research participants


When you move your project to production we have the same text and an additional sentence:

- You have thoroughly tested all forms, variables and project settings (emailings, scheduling, etc) so that no more changes are required



POP UP TEXT WHEN YOU START CREATING YOUR PROJECT

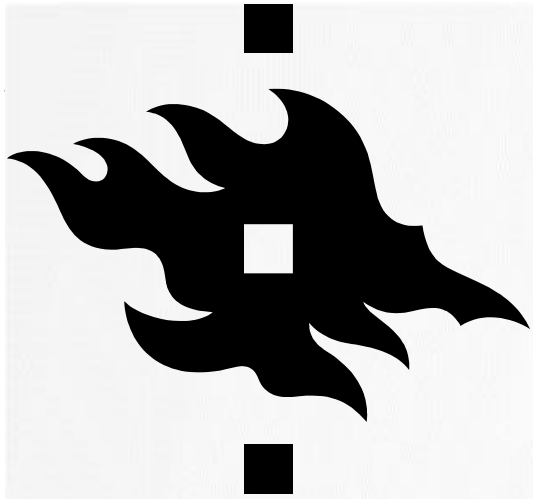
Notice ✕



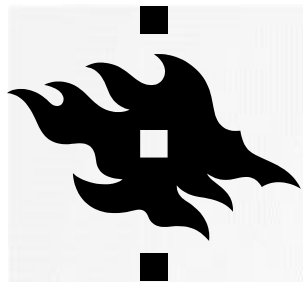
UNIVERSITY OF HELSINKI

Please make sure that:

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- You have a Data Protection Notice (Privacy Notice) for informing research participants
- You have done a Data Protection Impact Assessment (**if required**)



FRONT PAGE AND YOUR PROFILE



THE FRONT PAGE OF REDCAP AFTER LOGGING IN AND PROFILE

Welcome to REDCap!

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

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

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

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

If you require assistance or have any questions about REDCap, please contact [REDCap Support at the University of Helsinki](#).

REDCap Features

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

Fast and flexible - Conception to production-level survey/database in less than one day.

Export data to common data analysis packages - Export your data to Microsoft Excel, PDF, SAS, Stata, R, or SPSS for analysis.

Ad Hoc Reporting - Create custom queries for generating reports to view or download.

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

Easily manage a contact list of survey respondents or create a simple survey link - Build a list of email contacts, create custom email invitations, and track who responds, or you may also create a single survey link to email out or post on a website.

Scheduling - Utilize a built-in project calendar and scheduling module for organizing your events and appointments.

REDCap Mobile App - Collect data offline using an app on a mobile device when there is no WiFi or cellular connection, and then later sync data back to the server.

Send files to others securely - Using 'Send-It', upload and send files to multiple recipients, including existing project documents, that are too large for email attachments or that contain sensitive data.

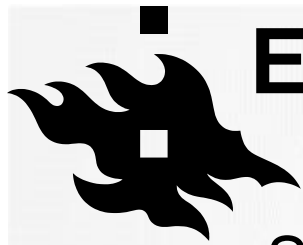
Save your data collection instruments as a PDF to print - Generate a PDF version of your forms and surveys for printing to collect data offline.

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

REDCap API - Have external applications connect to REDCap remotely in a programmatic or automated fashion.

Data Queries - Document the process of resolving data issues using the Data Resolution Workflow module.

Piping - Inject previously collected data values into question labels, survey invitation emails, etc. to provide a more customized experience.



EDITING YOUR PROFILE

- Set up Google/Microsoft authenticator for two-step verification
- You can add extra emails
- User preferences: Setting up time and date format
- User preferences: Setting up number format: decimals, how to separate thousands
- Notification preferences

Edit Your User Profile

If you wish, you may edit your User Profile information below. This information will not be given out to anyone but will be used to help us better keep track of who is using REDCap and also in case you need to be contacted regarding your access to REDCap.

Basic Information

First name:

Last name:

Primary email:

Phone number:

Mobile phone number:

Tip: To enter a number with an extension, place a comma between the number and the extension.

Save Basic Info

Login-related options:

Set up Google Authenticator or Microsoft Authenticator for two-step login

Additional Options

While your primary email address is used for receiving emails and notifications from REDCap, your secondary and tertiary email addresses can only be used when sending out emails from REDCap (e.g., sending survey invitations), in which they appear as the "From" address in the email.

Secondary email: [Remove](#)

Tertiary email:

User Preferences

Your preferences for how dates, timestamps, and numbers appear to you in REDCap.

Date and time format:

Number format - decimal character: (comma)

Number format - thousands separator:

Delimiter for CSV file downloads: (comma)

Save Preferences

Notification Preferences for REDCap Messenger

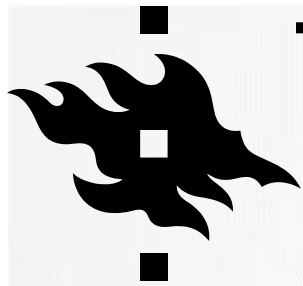
If you receive messages from REDCap, Messenger will send an email informing you of any unread messages (note: the email will *not* contain the message text itself). Below you may adjust your preferences for how often you want to receive email notifications from REDCap Messenger.

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.


Enable email notifications for General Notifications (sent by REDCap administrators) and System Notifications (updates about new features)?

Save Messenger Preferences





TWO-STEP VERIFICATION

- You can set up Google/Microsoft authenticator app for two-step verification > you get the verification code on your app
- Verification can be sent to your email as well > you have two minutes to enter the code

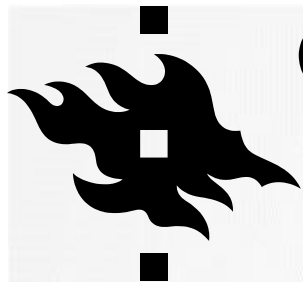
 **Two-step verification for REDCap login** ✕

Select an option below to complete the second half of REDCap's two-step verification login process. You will not be able to access REDCap until you have completed this verification step.

 **Google Authenticator or Microsoft Authenticator:** Open the Google Authenticator or Microsoft Authenticator app on your mobile device to get the verification code associated with your REDCap user account.

 **Email:** Send an email containing your verification code to your email account.
[Send to tuija.korhonen@helsinki.fi](mailto:tuija.korhonen@helsinki.fi)

Cancel




GOOGLE/MICROSOFT AUTHENTICATOR

Set up Google Authenticator or Microsoft Authenticator for two-step login [X]

To use two-step verification to log in to REDCap using Google Authenticator or Microsoft Authenticator mobile app, you will need to first download the app onto your mobile device. Use a link below to download the app on your mobile device.

1) Download the Google Authenticator or Microsoft Authenticator app to your mobile device
Download the app by searching for 'Google Authenticator' or 'Microsoft Authenticator' in your mobile device's app store (e.g., Apple App Store, Google Play Store).

2) Open the app, and scan this QR code [View QR code in separate window](#)



If you're having trouble scanning the QR code, enter the values below into your Google Authenticator app using the Manual Entry method. Also, make sure you set it as 'Time-based'.

Account: `thkorhon@helsinki.fi@redcap.helsinki.fi`
Key/secret: `[REDACTED]`

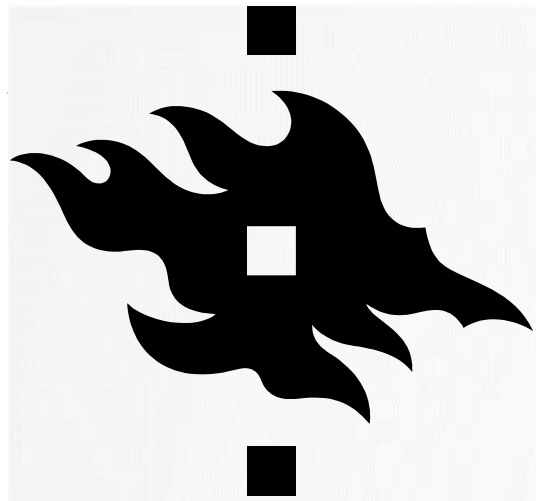
3) Use the app when you log in to REDCap
After you have scanned the QR code using the Google Authenticator or Microsoft Authenticator app, you can open the app at any time in the future to obtain your verification code for REDCap. The verification code is always changing, so it will be different each time you log in. **NOTE: The app does not require an internet connection** on your device in order to work.

Close

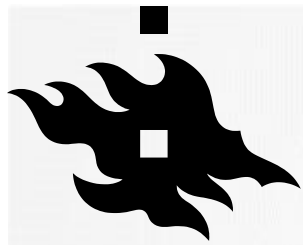
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Close



NAVIGATING REDCAP



NAVIGATION

- **Home:** the front page of REDCap
- You can see all your projects in **'My projects'**
 - You also see all projects into which you have been granted access.
- Start creating a new project in: **'New project'**
- **Help and FAQ**
- **Training videos** created by Vanderbilt University

The screenshot shows the REDCap navigation menu. A red box highlights the menu items: REDCap, Home, My Projects, New Project, Help & FAQ, and Training Videos. Five blue arrows point down to each of these items. Below the menu, the main content area displays a 'Welcome to REDCap!' message, followed by a description of the platform, a list of features, and a notice about human subjects research.

REDCap Home My Projects **+ New Project** Help & FAQ Training Videos Send-It Messenger Control Center

Welcome to REDCap!

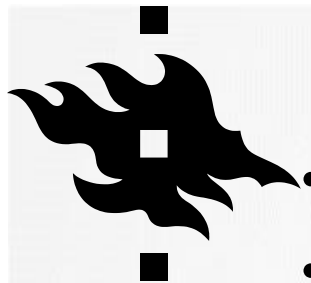
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Learn more about REDCap by watching a [brief summary video \(4 min\)](#). If you would like to view other quick video tutorials of REDCap in action and an overview of its features, please see the [Training Resources](#) page.

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If you require assistance or have any questions about REDCap, please contact [REDCap Support](#).



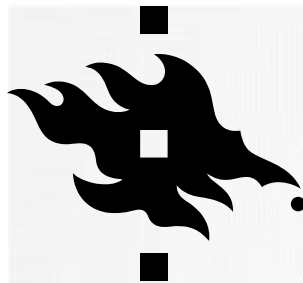
MY PROJECTS

- You can see all your projects in ‘**My Projects**’
- You also see all projects into which you have been granted access.
- You can **organize** your projects into folders.
- You can place projects in the folder ‘My Hidden Projects’ to hide them from view.
- Here you see the **title** of your project, **how many records** there are, **how many fields** there are, what is your **instrument** and what is the **type** and the **status** of your project.

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](#).

Project Title	PID	Records	Fields	Instruments	Type	Status
Unorganized Projects (0)						
REDCap training March	163	7	15	1 survey		■
suuri sydän (Eliisan koulutus_ elokuu_2021)	413	2	20	3 forms		■
Emollent cream 12.10.2021	504	1	39	2 forms, 1 survey		■
REDCap training 8.12.2021	636	4	27	2 surveys		■
REDCap Training 24.3.2022	827	0	14	1 form, 1 survey		■
Emollent for atopic eczema	1049	1	38	2 forms, 2 surveys		■
tests (89)						
REDCap (2)						
Feedback from REDCap Training	47	8	9	1 survey		■
eläinlääkis (2)						
eläinlääkis kokeilu	221	0	16	1 survey		■
eläinlääkis kokeilu 2	268	1	17	1 survey		■
DMP Workshop (8)						
IMDC (3)						
ilmoittautuslomakkeet (1)						
new (1)						
Other (3)						
[My Hidden Projects] (4)						

development status,
production status
analysis/cleanup status



MY PROJECTS: FOLDERS

- You can organize your projects into folders.
- Click 'Organize'
- Give the folder a name and click 'Add'

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](#).

Project Title	PID	Records	Fields	Instruments	Type	Status
Unorganized Projects (6)						
REDCap training March	163	7	15	1 survey		✓
suuri sydän (Elisan koulutus_elokuu_2021)	413	2	20	3 forms		
Emollient cream 12.10.2021	504	1	39	3 forms 1 survey		✓
REDCap training 8.12.2021	636	4	27	2 surveys		✓
REDCap Training 24.3.2022	827	0	14	1 form 1 survey		
Emollient for atopic eczema	1049	1	38	2 forms 2 surveys		
+ tests (89)						
REDCap (2)						
Feedback from REDCap Training	47	8	9	1 survey		✓
eläinlääkis (2)						
eläinlääkis kokeilu	221	0	16	1 survey		●
eläinlääkis kokeilu 2	268	1	17	1 survey		
+ DMP Workshop (8)						
+ IMDC (3)						
+ ilmoittautumislomakkeet (1)						
+ new (1)						
+ Other (3)						
[My Hidden Projects] (4)						

Show Completed Projects

Organize Projects

Project Folders are a way to organize the projects on your My Projects page by putting them into groups. You may create new folders below and then assign your projects to them on the right. A project can be assigned to multiple folders at the same time. To reorder your folders, you can drag and drop them in the left-hand table. Note: Only you can see your folders; they are for your own personal organization. **If you wish to simply hide projects from your My Projects list, you may put them in the 'My Hidden Projects' folder, which will keep them in an always-collapsed folder at the bottom of the My Projects page.**

STEP 1: Create Folders

My Folders

New Folder

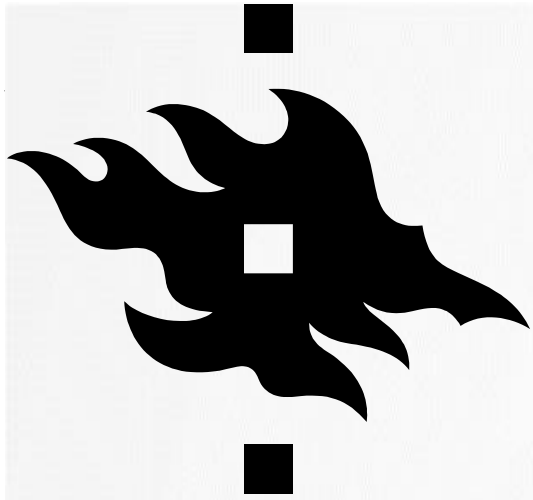
Add

STEP 2: Assign Projects To Folders

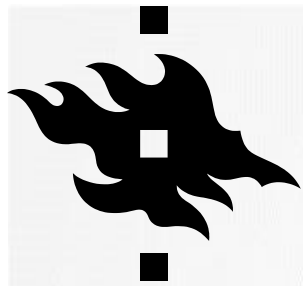
--- Select a folder ---

Filter projects by title

Hide projects already assigned

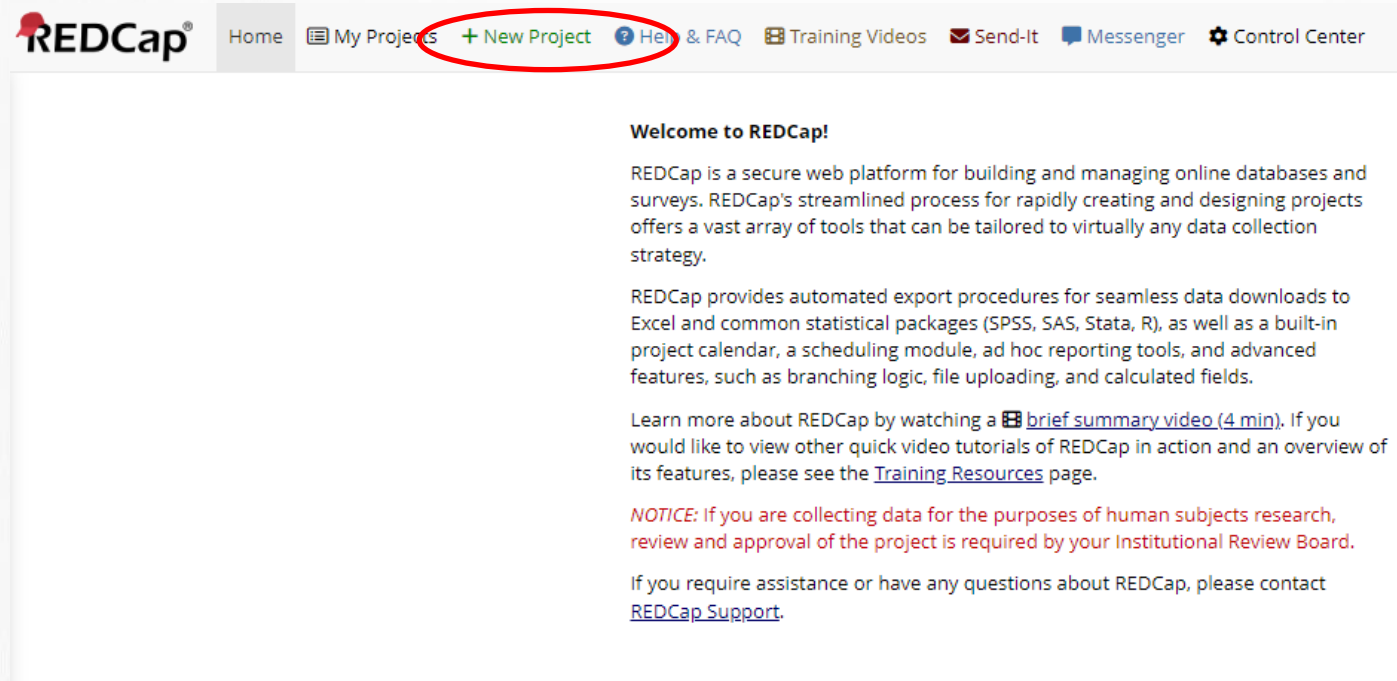


STARTING A PROJECT



STARTING A PROJECT

- Click 'New Project'

A screenshot of the REDCap website's main navigation bar and content area. The navigation bar includes the REDCap logo, a 'Home' button, a 'My Projects' button, a '+ New Project' button (circled in red), a 'Help & FAQ' button, a 'Training Videos' button, a 'Send-It' button, a 'Messenger' button, and a 'Control Center' button. The main content area contains a 'Welcome to REDCap!' section with introductory text, a list of features, a link to a video, and a notice about human subjects research.

REDCap Home My Projects **+ New Project** Help & FAQ Training Videos Send-It Messenger Control Center

Welcome to REDCap!

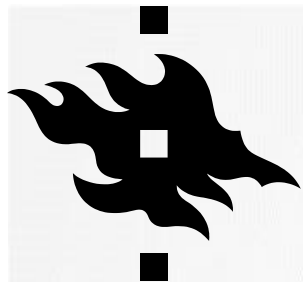
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NOTICE: If you are collecting data for the purposes of human subjects research, review and approval of the project is required by your Institutional Review Board.

If you require assistance or have any questions about REDCap, please contact [REDCap Support](#).



STARTING A PROJECT

- Add a **title** to your project
- Choose the **Purpose** of the project
- Choose whether you start your project from scratch or use templates
- Finally: click 'Create Project'

+ Create a new REDCap Project

You may begin the creation of a new REDCap project on your own by completing the form below and clicking the Create Project button at the bottom.

Project title:
Title to be displayed on project webpage

Purpose of this project: **How will it be used?**

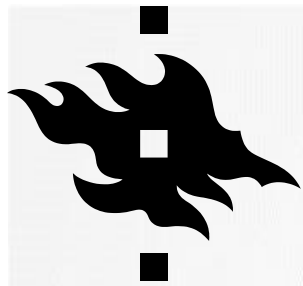
Project notes (optional):
Comments describing the project's use or purpose that are displayed on the My Projects page.

Start project from scratch or begin with a template?

Create an empty project (blank slate)
 Upload a REDCap project XML file (CDISC ODM format) [?](#)
 Use a template (choose one below)


★ Choose a project template (comes pre-filled with fields, forms/surveys, and other settings) [+ Add templates \(Administrators only\)](#)

select template	Template title (sorted by title)	Template description
<input type="radio"/>	Field Embedding Example Project	Contains a single data collection instrument to demonstrate the Field Embedding feature.
<input type="radio"/>	Human Cancer Tissue Biobank	Contains five data entry forms for collecting and tracking information for cancer tissue.
<input type="radio"/>	Multiple Surveys (classic)	Contains three surveys and a data entry form. Includes a pre-screening survey followed by two follow-up surveys to capture information from the participant, and then a data entry form for final data to be entered by the study... Show more
<input type="radio"/>	Multiple Surveys (longitudinal)	Contains three surveys and a data entry form. Includes a pre-screening survey followed by two follow-up surveys, one of which is a questionnaire taken weekly to capture participant



THE FIRST POP UP WINDOW BEFORE YOUR PROJECT IS CREATED

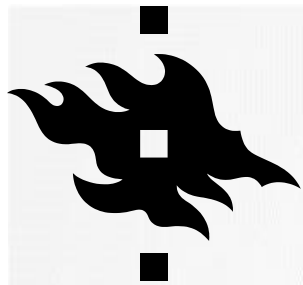
Notice ✕



UNIVERSITY OF HELSINKI

Please make sure that:

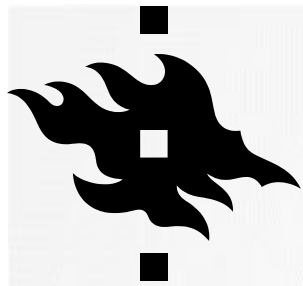
- You have approval from your Ethical Review Board (**if required**)
<https://tenk.fi/en/ethical-review/ethical-review-finland>
- You have done the Data Protection Preliminary Evaluation. See the **Data protection guide for researchers** in Flamma
<https://flamma.helsinki.fi/en/group/tutkimuksen-tuki/tutkimuksen-tietosuoja-asiat>
 - You have done a Data Protection Impact Assessment (**if required**)
- You have a Data Protection Notice (Privacy Notice) for informing research participants



PROJECT SETUP: A CHECKLIST FOR YOUR PROJECT

- This page appears after you have created your project and it works as a **checklist** for your project
- Main project settings
- Design your data collection instruments
- Enable optional modules and customization
- Set up project bookmarks
- User rights and permissions
- Test your project thoroughly
- Move your project to production status

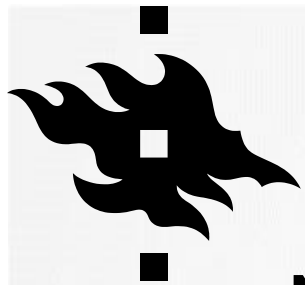
The screenshot shows the REDCap Project Setup page for a project named 'Testi 5'. The page is divided into several sections, each with a 'Not started' status and a 'Go to' button. The sections are: 'Main project settings', 'Design your data collection instruments', 'Enable optional modules and customizations', 'Set up project bookmarks (optional)', 'User Rights and Permissions', 'Test your project thoroughly', and 'Move your project to production status'. Red circles highlight the 'Project Setup' tab in the top navigation, the 'Main project settings' section, the 'Design your data collection instruments' section, the 'Enable optional modules and customizations' section, the 'Set up project bookmarks (optional)' section, the 'User Rights and Permissions' section, the 'Test your project thoroughly' section, and the 'Move your project to production status' section. The 'Main project settings' section includes options for 'Use surveys in this project?' and 'Use longitudinal data collection with defined events?'. The 'Design your data collection instruments' section includes links for 'Online Designer' and 'Data Dictionary'. The 'Enable optional modules and customizations' section includes options for 'Auto-numbering for records?', 'Scheduling module (longitudinal only)?', 'Randomization module?', 'Designate an email field for sending survey invitations?', and 'Twilio SMS and Voice Call services for surveys and alerts?'. The 'Set up project bookmarks (optional)' section includes a link for 'Add or edit bookmarks'. The 'User Rights and Permissions' section includes links for 'User Rights' and 'Data Access Groups'. The 'Test your project thoroughly' section includes a link for 'Test your project thoroughly'. The 'Move your project to production status' section includes a link for 'Move project to production'.



SETTING UP YOUR PROJECT

- Title and ID
- The **settings** for your project (main project settings): survey, longitudinal data collection; modifying the title of your project...
- The **status** of your project: Development/Production
- **Not started/I'm done**
 - Click when you are finished with that step:
- You can see how many steps you have completed

The screenshot shows the REDCap Project Setup interface. At the top, the project name 'palaute' is circled in red. Below it, the 'Project Setup' tab is also circled. The 'Project status' is set to 'Development', which is circled in red. A progress indicator shows 'Completed steps 0 of 7', also circled in red. The 'Main project settings' section is circled in red and contains options for 'Use surveys in this project?' and 'Use longitudinal data collection with defined events?'. The 'Design your data collection instruments' section is also circled in red and includes links to 'Online Designer' and 'Data Dictionary'. The 'Enable optional modules and customizations' section is circled in red and lists options like 'Repeatable instruments', 'Auto-numbering for records', 'Scheduling module', 'Randomization module', 'Designate an email field', and 'Twilio SMS and Voice Call services'. The 'Set up project bookmarks (optional)' section is circled in red and explains how to create custom bookmarks.



PROJECT SETUP: YOUR CHECKLIST FOR YOUR PROJECT

Not started/I'm done

- Click when you are finished with that step > now it's **Complete!**
- You can also undo it, if you are not finished with that step

palaute PID 37

Project Home Project Setup Other Functionality Proj

Project status: Development

Main project settings

Click if finished with this step.

Enable Use surveys in this project? ?

Enable Use longitudinal data collection with defined event

Modify project title, purpose, etc.

Main project settings

Complete!

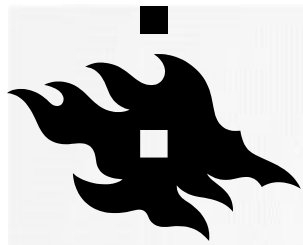
Enable Use surveys in this project? ?

Enable Use longitudinal data collection with defined events? ?

Modify project title, purpose, etc.

[VIDEO: How to create and manage a survey](#)

Not complete?



PROJECT SETUP : MAIN PROJECT SETTINGS

- Here you **enable surveys** if you are creating a survey!
- You can also modify your project's title and purpose here.
- Project title, purpose etc. was done at the beginning of creating the project but can be changed.

Main project settings

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

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

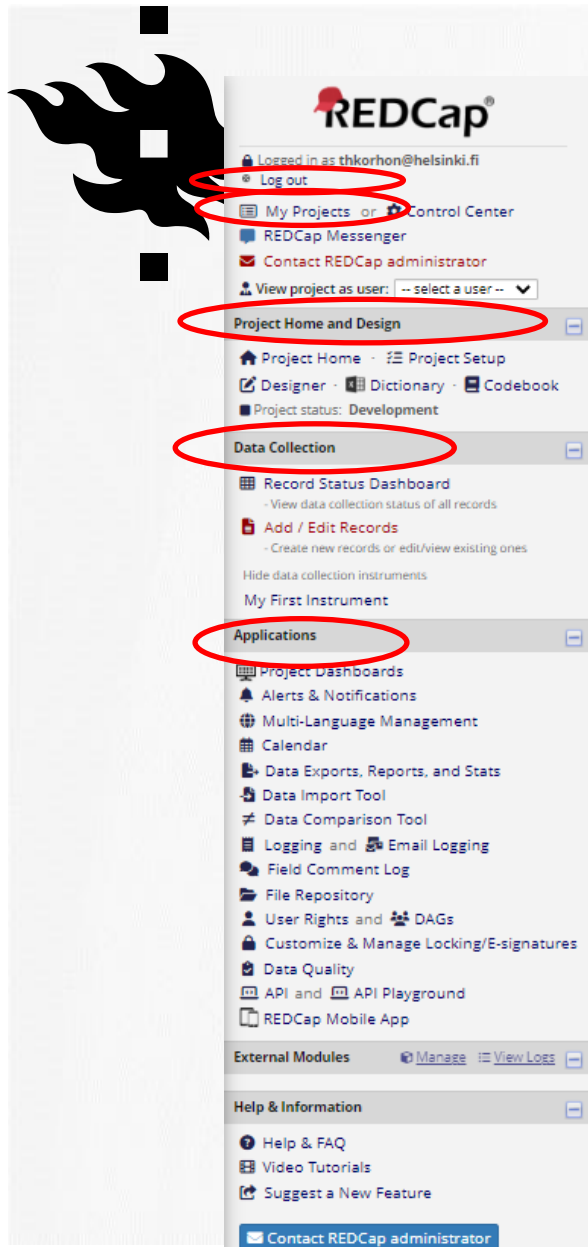
Modify Project Settings

Project title:
Title to be displayed on project webpage

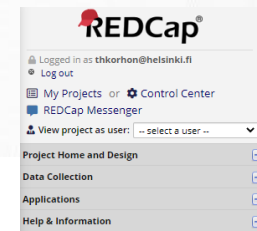
Purpose of this project:
How will it be used?

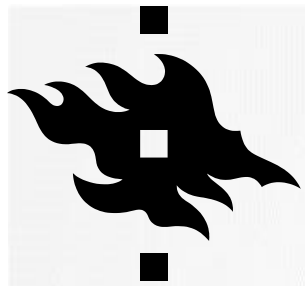
Project notes (optional):
Comments describing the project's use or purpose that are displayed on the My Projects page.

NAVIGATION: WHEN IN YOUR PROJECT



- On the left panel there's a navigation menu which appears when you are inside a project.
- From there you can log out or access all your projects from '**My Projects**'
- **Project Home and Design**: this is where you can access your Project Statistics and can start creating your project
- In **Data Collection** you can view the data collection status of all records and you can also add new records or edit existing ones
- In **Applications** you can give user rights to your project, see the logging information, export data, translate the interface, create a calendar...
- You can hide the menu from view by clicking on the minus sign





PROJECT HOME

- Dashboard of a project
 - Users
 - Statistics
 - Calendar Events

testi 3 PID 81

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

The tables below provide general dashboard information, such as a list of all users with access to this project, general project statistics, and upcoming calendar events (if any).

☆ Project is not used as a template [Add](#)

Current Users (4)	
User	Expires
allardt@helsinki.fi (Monica Allardt)	never
hepoleht@helsinki.fi (Iina Hepolehto)	never
larmo@helsinki.fi (Katri Larmo)	never
thkorhon@helsinki.fi (Tuija Korhonen)	never

Project Statistics	
Records in project	0
Most recent activity	02.02.2021 15:33
Space usage for docs	0,00 MB

Upcoming Calendar Events (next 7 days)		
Time	Date	Description
		No upcoming events



PROJECT SETUP

The screenshot shows the 'Project Setup' page for a project named 'palaute'. The page is divided into several sections, each with a status indicator and a 'Go to' button. The 'Project Setup' tab is highlighted with a red circle. The 'Main project settings' section is marked as 'Complete!'. The 'Design your data collection instruments' section is marked as 'Not started'. The 'Enable optional modules and customizations' section is marked as 'Optional'. The 'Set up project bookmarks (optional)' section is marked as 'Optional'. The 'User Rights and Permissions' section is marked as 'Optional'. The 'Test your project thoroughly' section is marked as 'Not started'. The 'Move your project to production status' section is marked as 'Not started'.

palaute PID 37

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

Project status: Development Completed steps 1 of 7

Complete! Main project settings

Enable Use surveys in this project? [VIDDO: How to create and manage a survey](#)
Enable Use longitudinal data collection with defined events? [?](#)
[Modify project title, purpose, etc.](#)

Not started Design your data collection instruments

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

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

Have you checked the [Check For Identifiers](#) page to ensure all identifier fields have been tagged?
Learn how to use: [Smart Variables](#) [Piping](#) [Action Tags](#) [Field embedding](#)

Optional Enable optional modules and customizations

Enable Repeatable instruments [?](#)
Disable Auto-numbering for records [?](#)
Enable Scheduling module (longitudinal only) [?](#)
Enable Randomization module [?](#)
Enable Designate an email field for sending survey invitations [?](#)
Enable Twilio SMS and Voice Call services for surveys and alerts [?](#)
[Additional customizations](#)

Optional Set up project bookmarks (optional)

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](#)

Optional User Rights and Permissions

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

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

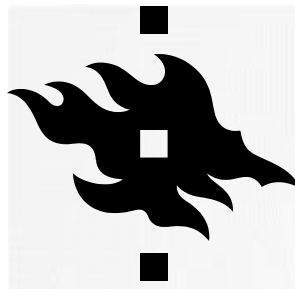
Not started Test your project thoroughly

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

Not started Move your project to production status

Move the project to production status so that real data may be collected. Once in production, you will not be able to edit the project fields in real time anymore. However, you can make edits in Draft Mode, which will be auto-approved or else might need to be approved by a REDCap administrator before taking effect.

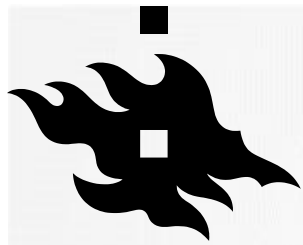
Go to [Move project to production](#)



PROJECT SETUP: DESIGN YOUR DATA COLLECTION INSTRUMENTS

- Click on the '**Online Designer**' tool to start designing your data collection instrument

The screenshot shows the REDCap interface for a project named 'Test' (PID 1338). The left sidebar contains navigation menus for 'Project Home and Design', 'Data Collection', and 'Applications'. The main content area has tabs for 'Project Home', 'Project Setup', 'Other Functionality', and 'Project Revision History'. Under 'Project Setup', the 'Project status' is 'Development' and 'Completed steps 0 of 7'. Two main sections are visible: 'Main project settings' and 'Design your data collection instruments'. The 'Design your data collection instruments' section includes a red 'Not started' indicator and a red circle around the 'Online Designer' button. Other buttons include 'Data Dictionary' and 'REDCap Instrument Library'. Below this, there are links for 'Check For Identifiers', 'Smart Variables', 'Piping', 'Action Tags', 'Field Embedding', and 'Special Functions'.



ONLINE DESIGNER

- Your **data collection instrument**, default name is 'My First Instrument'
- If you want to use surveys click 'Enable' > you are directed to 'set up my survey' page
- You can edit the instrument's name, you can copy or delete it as well

Project Home Project Setup **Online Designer** Data Dictionary Codebook

Create snapshot of instruments VIDEO: How to use this page
Last snapshot: never ?

The Online Designer will allow you to make project modifications to fields and data collection instruments very easily using only your web browser. NOTE: While in development status, all field changes will take effect immediately in real time.

Data Collection Instruments

Survey options: Survey Queue Survey Login Survey Notifications Upload or download Auto Invitations

Add new instrument: Create Import Upload

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
My First Instrument	1		Enable	Choose action	

Project Home Project Setup Online Designer **Data Dictionary** Codebook

Create snapshot of instruments VIDEO: How to use this page
Last snapshot: never ?

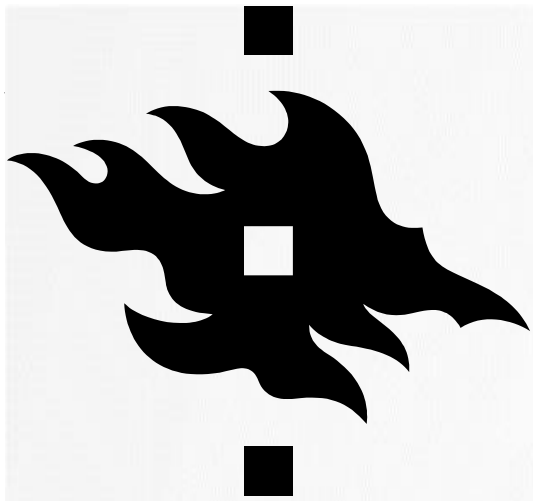
The Online Designer will allow you to make project modifications to fields and data collection instruments very easily using only your web browser. NOTE: While in development status, all field changes will take effect immediately in real time.

Data Collection Instruments

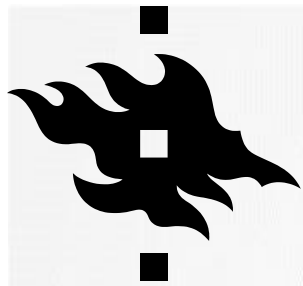
Add new instrument: Create Import Upload

Instrument name	Fields	View PDF	Instrument actions
Basic Demography Form	15		Choose action

- Rename
- Copy
- Delete
- Download instrument ZIP

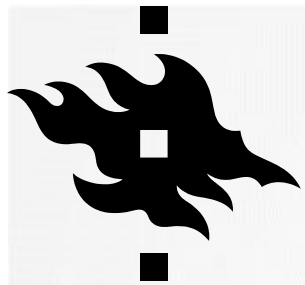


PROJECT SETUP: ONLINE DESIGNER



PROJECT SETUP: ONLINE DESIGNER

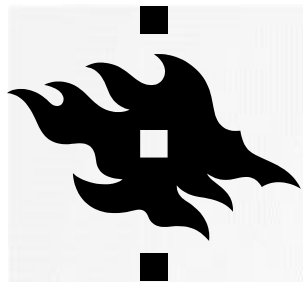
- In Online Designer you create your Data Collection Instrument
- This part of setting up your project takes time and often demands repeated testing!
- Start by adding **fields** to your instrument
- You need to define all the **variables**
- **Values and their codes** (1=Male, 2=Female, 3=Other, 4=No_Answer)
- **Validation** checks (height between 100-300cm)
- Check **identifiers**



ONLINE DESIGNER FOR YOUR PROJECT

- Explanations of the icons and instructions on the top of the page
- You can go to survey settings as well from here, if you have enabled surveys in your project
- You can preview your instrument

A screenshot of the REDCap Online Designer interface. At the top, there is a navigation bar with buttons for 'Project Home', 'Project Setup', 'Online Designer', 'Data Dictionary', and 'Codebook'. Below this, there are buttons for 'Create snapshot of instruments' and a video link 'VIDEO: How to use this page'. The main text area contains instructions on how to build and customize data collection instruments, with red circles highlighting the 'Add Field' button, the 'Edit' icon, and the 'Delete' icon. Below the text, there are links for 'Learn how to use' followed by 'Smart Variables', 'Piping', 'Action Tags', and 'Field embedding'. At the bottom, there are buttons for 'Return to list of instruments' and 'Survey settings', and a 'Preview instrument' button. The current instrument is identified as 'My First Instrument'.



PROJECT SETUP: ONLINE DESIGNER

- Click on your instrument's name to start creating your instrument
- Click 'Add Field' to start adding fields to your instrument
- Video on how to use this

testi 3 PID #1

Project Home Project Setup Online Designer Data Dictionary Codebook

Create snapshot of instruments Last snapshot: never VIDEO: How to use this page

The Online Designer will allow you to make project modifications to fields and data collection instruments very easily using only your web browser. NOTE: While in development status, all field changes will take effect immediately in real time.

Data Collect Instruments

Click to modify instrument
Add new fields/questions to the instrument or modify existing ones.

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

My First Instrument

Project Home Project Setup Online Designer Data Dictionary Codebook

Create snapshot of instruments Last snapshot: never VIDEO: How to use this page

Ready to add fields

You may now begin adding fields to your data collection instrument below using the Online Designer. Alternatively, you may build your fields in the Data Dictionary (offline method) by clicking its tab above.

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.

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

[Return to list of instruments](#)

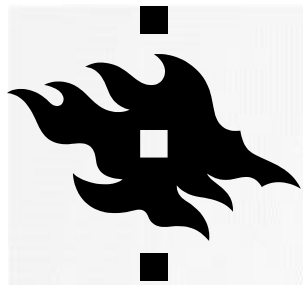
Current instrument: **My First Instrument** [Preview instrument](#)

Variable: record_id

Record ID

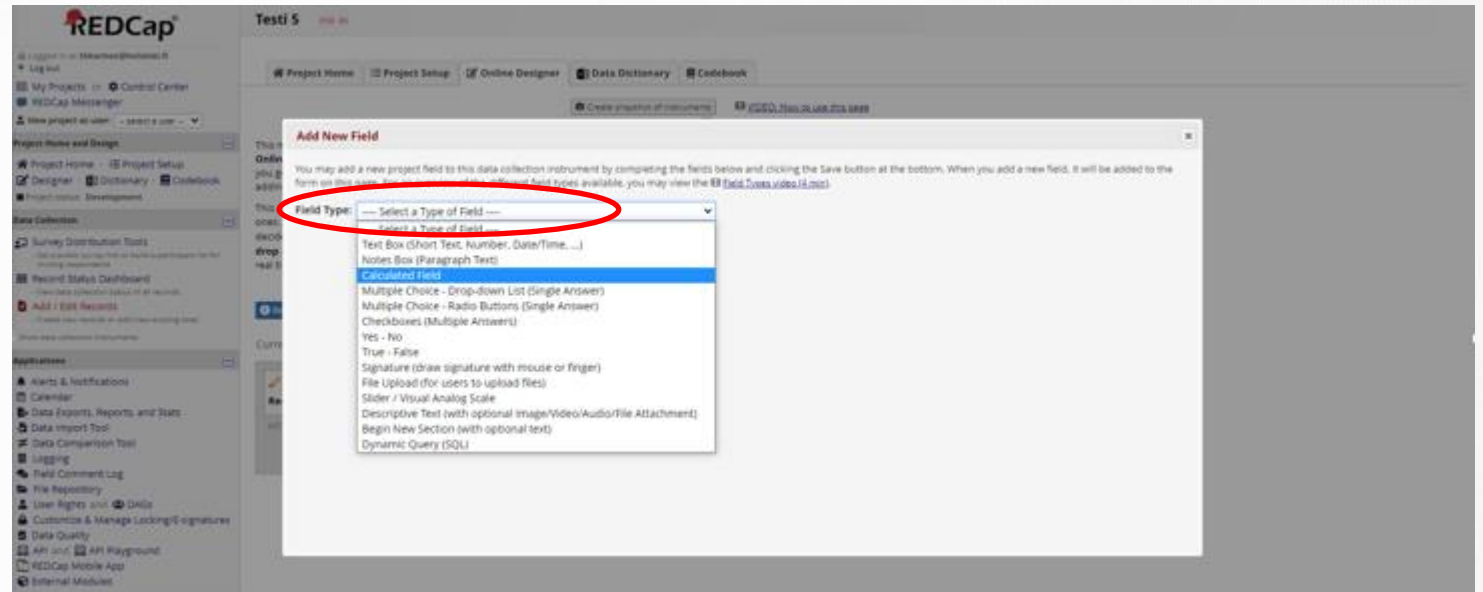
NOTE: The field above is the record ID field and thus cannot be deleted or moved. It can only be edited.

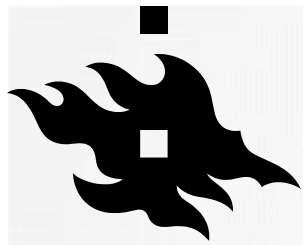
[Add Field](#) [Add Matrix of Fields](#)



PROJECT SETUP: ONLINE DESIGNER

- After you have clicked 'Add Field':
- Choose field type from the dropdown list





PROJECT SETUP: ONLINE DESIGNER

- **Field type:** choose from dropdown list
- **Field Label,** here you put your question
- **Variable name:** you can name it yourself or use auto naming (you can't use å, ä, ö or special characters)
- **Validation** (optional)
- Is this a **required field**?
- Is this an **identifier**?
- You get more text formatting options when you click 'Use the **Rich Text Editor**'

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

Use the Rich Text Editor

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

ONLY letters, numbers, and underscores

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

Validation? (optional) None

-- select ontology service --

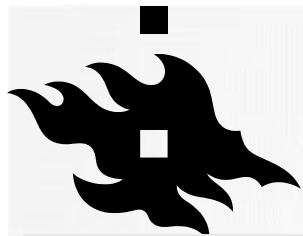
Required?* No Yes

Identifier? No Yes

Custom Alignment Right / Vertical (RV)

Field Note (optional)

Save Cancel



RICH TEXT EDITOR

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:

Field Label

Use the Rich Text Editor [?](#)

Paragraph **B** *I*

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

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

How to use: [Smart Variables](#) [Piping](#) [Field embedding](#)

Validation? (optional)

- OR -

Required?* No Yes
* Prompt if field is blank

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

Custom Alignment
Align the position of the field on the page

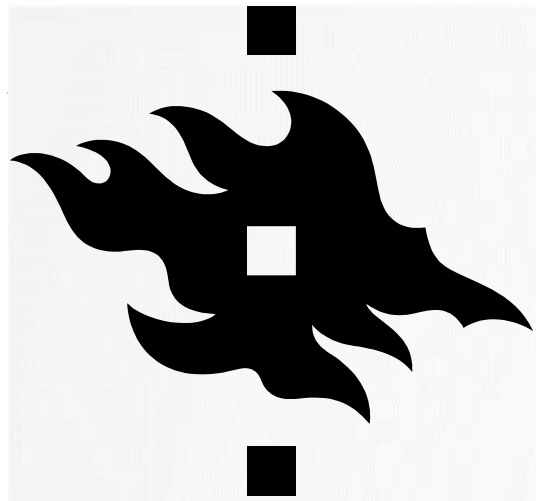
Field Note (optional)
Small reminder text displayed underneath field

Action Tags / Field Annotation (optional)

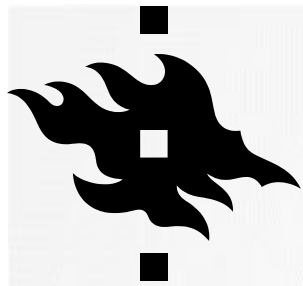
Learn about [@ Action Tags](#) or [using Field Annotation](#)

Use the Rich Text Editor

For any field on an instrument, you may optionally utilize the rich text editor for styling your field labels or section headers with many text-formatting options. The rich text editor allows you to change the color of text (including background color), create tables, add text of varying sizes, bullet lists, and more. For any field labels that were originally created without the rich text editor, you may optionally enable the rich text editor for any field by clicking the 'Use the Rich Text Editor' checkbox. It may also be disabled afterward at any time just the same. Note: The PDF export of your instruments will **not** reflect all the styling of the rich text editor, so keep in mind that line breaks and paragraphs should be represented well in PDFs, but other text-formatting options, such as large text, bullet points, and colors are not able to be translated into the PDF export of the instrument. This is a current limitation in REDCap.



FIELDS IN YOUR DATA COLLECTION INSTRUMENT



DATA COLLECTION INSTRUMENT

- **Record ID** is added automatically and cannot be changed
- **Icons** and what they do: edit; create branching logic; copy; move; delete
- The **variable** name is visible here
- For some fields you can have **stop actions**: certain answers exclude the participant from answering the survey
- On this field there is **branching logic**

Current instrument: **Form 1** Preview instrument

Variable: record_id
Record ID
* This field will NOT be displayed on the survey page.
* You should NOT use identifiers (e.g., MRN, SSN) for the record ID field.
NOTE: The field above is the record ID field and thus cannot be deleted or moved. It can only be edited.

Variable: last_name
last name

Variable: email
Email

Variable: colour_favourite
Do you have a favourite colour? Yes No reset

Variable: colour_favourite_what
What is your favourite colour? red blue yellow green black white pink purple reset



PROJECT SETUP: ONLINE DESIGNER

- Field type: **Text Box** (Short Text, Number, Date/Time...)
- This field type is for short questions: names, dates...
- Question in the **Field Label**:
What is your name?
- Name for the **variable**
- Names can't be **validated**
- In this case the field is **required**
- Names are **identifiers**

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, ...)

Question Number (optional)
Displayed only on the survey page

Field Label Use the Rich Text Editor ?

Paragraph **B** *I*

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

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

Validation? (optional)

-- OF --

-- select ontology service --

Required?* No Yes

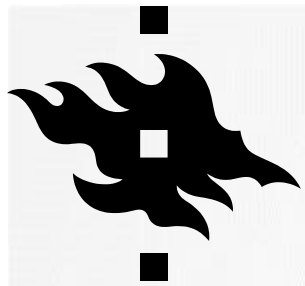
Identifier? No Yes
Does the field contain identifying information (e.g., name, SSN, address)?

Custom Alignment
Align the position of the field on the page

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

Action Tags / Field Annotation (optional)

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



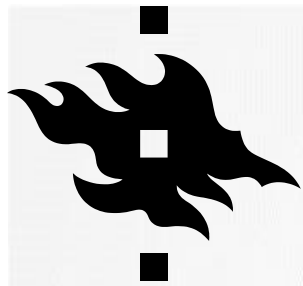
PROJECT SETUP: ONLINE DESIGNER

- Field type: **Text Box** (Short Text, Number, Date/Time...)

The screenshot shows the REDCap online designer interface. At the top left, there are icons for edit, copy, paste, and delete, followed by the text "Variable: name". At the top right, there is a link "How to embed a field elsewhere". The main area contains a text box field with the label "What is your name?" and a red asterisk indicating a required field. Below the label is the text "* must provide value". The text box itself is empty.

- This is how this field appears to the survey participants:

The screenshot shows the final appearance of the text box field to survey participants. It features the label "What is your name?" in bold black text, followed by a red asterisk and the text "* must provide value" in red. To the right of the label is an empty white text box with a thin grey border.



PROJECT SETUP: ONLINE DESIGNER

- Field type: **multiple choice – Drop down list** (Single Answer)
- When your mouse hovers over an icon you see what you can do with that tool

Variable: pets

How to embed a field elsewhere

Edit

Which pet(s) do you own?

* must provide value

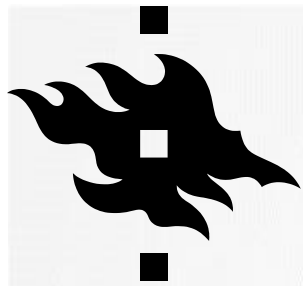
cat

dog

rabbit

snake

- You can edit, copy, move, delete the field or add branching logic to it.
- This is a **required** field in this project



PROJECT SETUP: ONLINE DESIGNER

- Field type: **Multiple choice – Drop down list (Single Answer)**

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:

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

Which is your favorite season?

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

1, Winter
2, Spring
3, Summer
4, Fall

Enable auto-complete for this drop-down [?](#)

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

Action Tags / Field Annotation (optional)

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

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

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

ONLY letters, numbers, and underscores

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

Required?* No Yes
* Prompt if field is blank

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

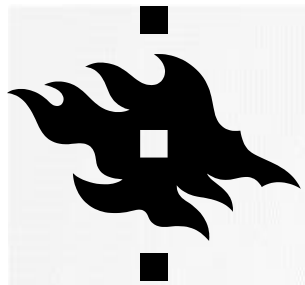
Custom Alignment

Align the position of the field on the page

Field Note (optional)

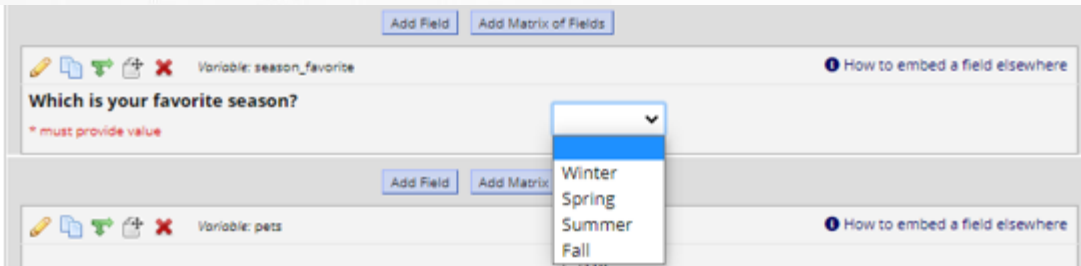
Small reminder text displayed underneath field

Save Cancel



PROJECT SETUP: ONLINE DESIGNER

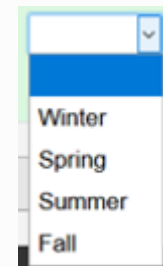
- Field type: **Multiple choice – Drop down list** (Single Answer)



- This is how the field appears to survey participants:

5) Which is your favorite season?

* must provide value





PROJECT SETUP: ONLINE DESIGNER

- Field type: **Multiple choice – Radio Buttons (Single Answer)**

Add New Field

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

Field Label Use the Rich Text Editor ?

Paragraph **B** *I* [Link](#) **≡** **≡** **≡** **≡** **↶** **↷** **↻**

What is your favorite ice cream flavor?

1, vanilla
2, strawberry
3, chocolate
4, other

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

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

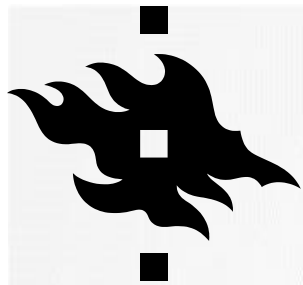
Required?* No Yes
* Prompt if field is blank

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

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



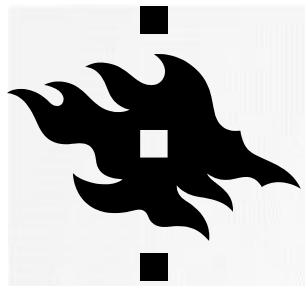
PROJECT SETUP: ONLINE DESIGNER

- Field type: **Multiple choice – Radio Buttons** (Single Answer)

A screenshot of the REDCap Online Designer interface. At the top, there is a toolbar with icons for edit, copy, paste, add, stop, and delete, followed by the text "Variable: flavor_favorite" and a link "How to embed a field elsewhere". The main area shows a question "What is your favorite ice cream flavor?" in blue text. To the right of the question are four radio button options: "vanilla", "strawberry", "chocolate", and "other". A "reset" button is located at the bottom right of the field.

- This is how the field appears to the survey participants:

A screenshot showing how the field appears to survey participants. It features a numbered question "1) What is your favorite ice cream flavor?" in blue text. To the right of the question are four radio button options: "vanilla", "strawberry", "chocolate", and "other". A "reset" button is located at the bottom right of the field.



PROJECT SETUP: ONLINE DESIGNER

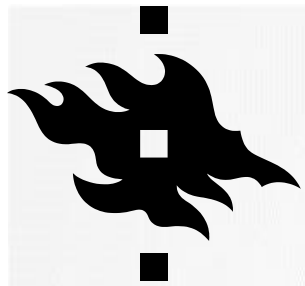
- Field type: **checkboxes** (multiple answers)
- Survey participants can check more than one box
- When you have added your choices and start modifying another box, system adds raw values for choices automatically

- This is how the field appears to the participants:

5) Which pet(s) do you own?
** must provide value*

cat
 dog
 rabbit
 snake

The screenshot shows the 'Add New Field' configuration screen in REDCap. The 'Field Type' is set to 'Checkboxes (Multiple Answers)'. The 'Field Label' is 'Which pet(s) do you own?'. A modal dialog box is open, displaying the message: 'Raw values for choices were added automatically'. The dialog lists the following raw values: '1 was set as the raw value for cat', '2 was set as the raw value for dog', '3 was set as the raw value for rabbit', and '4 was set as the raw value for snake'. The dialog also includes a 'Close' button.



PROJECT SETUP: ONLINE DESIGNER

- Field type: **Begin New Section** (with optional text)
- Cannot be the last field

Edit Field ✕

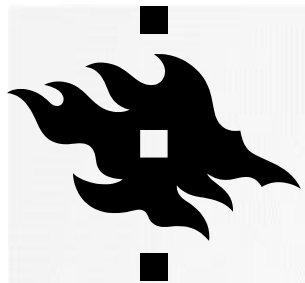
You may add a new project field to this data collection instrument by completing the fields below and clicking the Save button at the bottom. When you add a new field, it will be added to the form on this page. For an overview of the different field types available, you may view the [Field Types video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

Field Type:

Field Label Use the Rich Text Editor ?

Paragraph **B** *I*

This is a new section.



PROJECT SETUP: ONLINE DESIGNER

- Field type: **Yes - No** and Field type: **True - False**

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:

Field Label Use the Rich Text Editor ?

Do you own a pet?

Choices (not modifiable)

1, Yes
0, No

Action Tags / Field Annotation (optional)

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

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

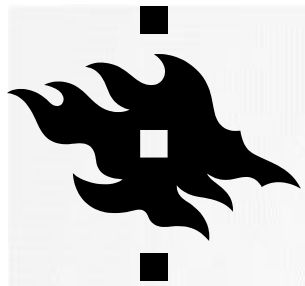
How to use [Smart Variables](#) [Piping](#) [Field embedding](#)

Required?* No Yes
* Prompt if field is blank

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

Custom Alignment
Align the position of the field on the page

Field Note (optional)
Small reminder text displayed underneath field



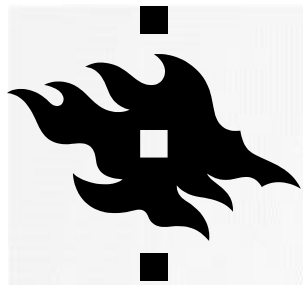
PROJECT SETUP: ONLINE DESIGNER

- Field type: Yes – No

The screenshot shows the REDCap online designer interface. At the top, there are icons for edit, copy, paste, add, and delete, followed by the text "Variable: ownership" and a help link "How to embed a field elsewhere". The main field configuration area displays the question "Do you own a pet?" with two radio button options: "Yes" and "No". A red asterisk and the text "* must provide value" are shown below the question. A "reset" button is located at the bottom right of the field configuration area. Below the field configuration area, there are two buttons: "Add Field" and "Add Matrix of Fields".

- This is how the field appears to the survey participants:

The screenshot shows the survey participant view for the field. The question is numbered "3) Do you own a pet?". Below the question, there is a red asterisk and the text "* must provide value". There are two radio button options: "Yes" and "No". A "reset" button is located at the bottom right of the field configuration area.



PROJECT SETUP: ONLINE DESIGNER

- Field type: **File Upload**
- Survey participants can upload files

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: File Upload (for users to upload files)

Field Label Use the Rich Text Editor ?

Paragraph **B** *I*

You can upload your file here.

Action Tags / Field Annotation (optional)

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

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

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

Required?* No Yes
* Prompt if field is blank

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

Custom Alignment
Align the position of the field on the page

Field Note (optional)
Small reminder text displayed underneath field

Save **Cancel**

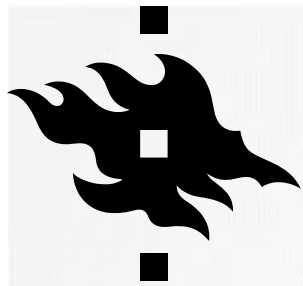
Variable: file [How to embed a field elsewhere](#)

You can upload your file here. [Upload file](#)

- This is how the field appears to the survey participants:

2) You can upload your file here.

[Upload file](#)



PROJECT SETUP: ONLINE DESIGNER

- Field type: **Slider / Visual Analog Scale**

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:

Question Number (optional)
Displayed only on the survey page

Field Label Use the Rich Text Editor ?

Labels displayed above slider (optional):
Left label (bottom, if vertical):
Middle label:
Right label (top, if vertical):
Display number value (0-100)?

Action Tags / Field Annotation (optional)

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

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

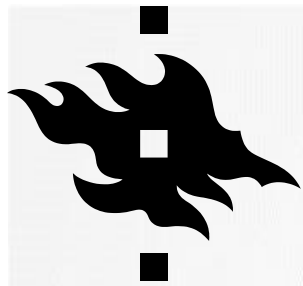
How to use [Smart Variables](#) [Piping](#) [Field embedding](#)

Required?* No Yes
* Prompt if field is blank

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

Custom Alignment
Align the position of the field on the page
TIP: Make your sliders vertical with RV or LV alignment.

Field Note (optional)
Small reminder text displayed underneath field



PROJECT SETUP: ONLINE DESIGNER

- Field type: **Slider** / Visual Analog Scale

Variable: feel_today [How to embed a field elsewhere](#)

How do you feel today?
** must provide value*

sad neutral happy

Change the slider above to set a response

reset

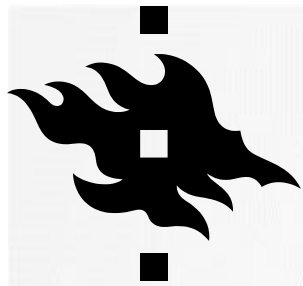
- This is how the respondents see this:

How do you feel today?
** must provide value*

sad neutral happy

Change the slider above to set a response

reset



PROJECT SETUP: ONLINE DESIGNER

- You can attach images, audio or video to your instrument

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

Question Number (optional)
Displayed only on the survey page

Field Label Use the Rich Text Editor ?

Action Tags / Field Annotation (optional)

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

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

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

Optional file attachment, image, audio, or video:

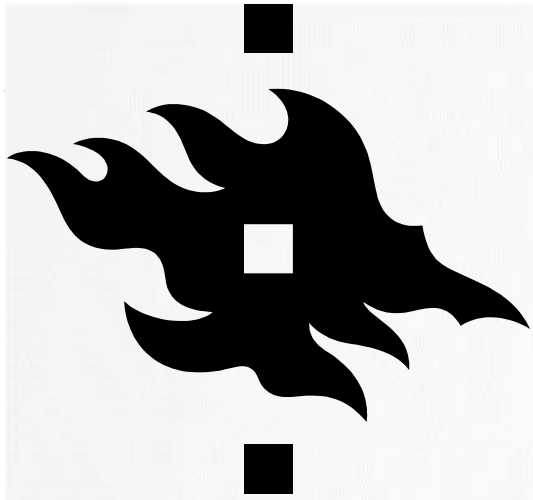
Embed an external video (provide video URL) ?

e.g. <https://youtube.com/watch?v=E1cCuWMupz0>,
<https://vimeo.com/62730281>, <http://example.com/movie.mp4>
Display format of video: Inline Inside popup
- or -
 Attach an image, file, or embedded audio
[Upload file](#)

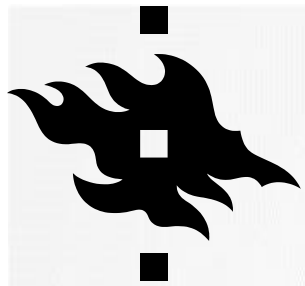
Attach an image, file, or embedded audio

Select a file then click the 'Upload File' button

No file chosen
(Max file size: 64MB)



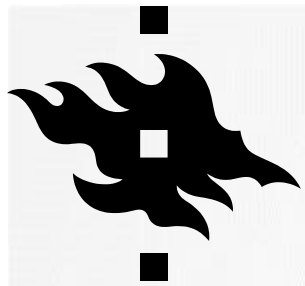
VALIDATION OF FIELDS



PROJECT SETUP: ONLINE DESIGNER: VALIDATION

- **Validation** of fields from the drop down list
- Determines in what format the survey participants can give their answers.
- Date, email, integer, number, phone (North America), Time, Zipcode (U.S)

The screenshot shows a validation dropdown menu in the REDCap online designer. The menu is open, displaying a list of validation options. The options are: --- None ---, Date (D-M-Y), Date (M-D-Y) (highlighted in blue), Date (Y-M-D), Datetime (D-M-Y H:M), Datetime (M-D-Y H:M), Datetime (Y-M-D H:M), Datetime w/ seconds (D-M-Y H:M:S), Datetime w/ seconds (M-D-Y H:M:S), Datetime w/ seconds (Y-M-D H:M:S), Email, Integer, Number, Phone (North America), Time (HH.MM), and Zipcode (U.S.). The background shows parts of the form configuration interface, including fields for 'Validation?' (optional), 'Required?*' (radio buttons for No and Yes), 'Identifier?' (radio buttons for No and Yes), 'Custom Alignment', and 'Field Note' (optional).



PROJECT SETUP: ONLINE DESIGNER: VALIDATION

- **Validation** of fields
- With dates, integers, numbers and time you can choose **minimum and maximum** values.

Validation? (optional) Number

Minimum: 1

Maximum: 100

- Survey participants will see a notification if their answer is outside the range.

This begins a new section.

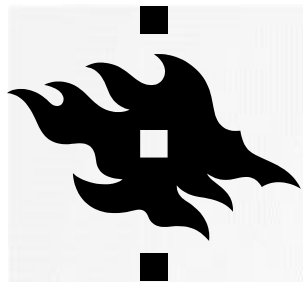
What is your name?
* must provide value

What is your age? 200

Alert

The value you provided is outside the suggested range. (1 - 100). This value is admissible, but you may wish to double check it.

Close



PROJECT SETUP: ONLINE DESIGNER: VALIDATION

- **Validation** of dates
- The format of the date can be validated

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, ...)

Question Number (optional)
Displayed only on the survey page

Field Label Use the Rich Text Editor [?](#)
Today's date

Action Tags / Field Annotation (optional)

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

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

How to use: [Smart Variables](#) [Piping](#) [Field embedding](#)

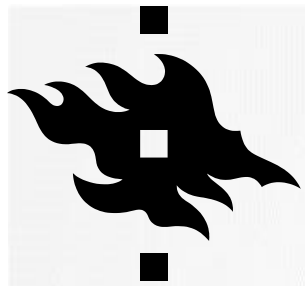
Validation? (optional) Date (D-M-Y)
Minimum:
Maximum:
- or -
-- select ontology service --

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



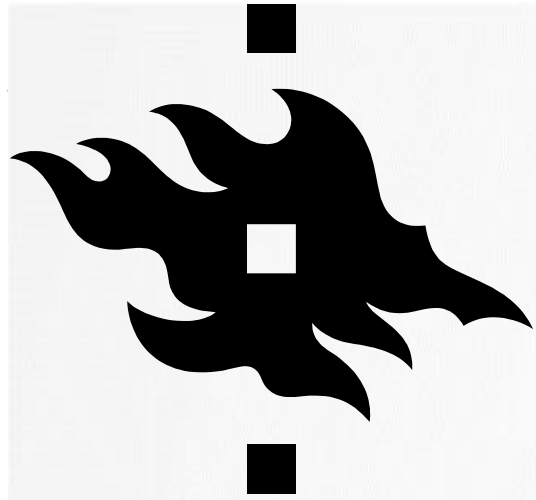
PROJECT SETUP: ONLINE DESIGNER: VALIDATION

- Validation of dates

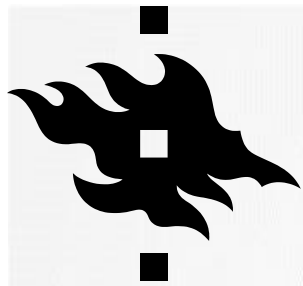
The screenshot shows a toolbar with icons for edit, copy, paste, and delete, followed by the text "Variable: date". On the right, there is a link "How to embed a field elsewhere". Below the toolbar, the text "Today's date" is followed by an empty input field, a calendar icon, a "Today" button, and the format "D-M-Y".

- The survey participants can click on the calendar or on today

The screenshot shows a survey form with a green header "Today's date". Below the header, there is a question "How do you feel today?" with a red asterisk and the text "* must provide value". Below the question, there is a text area with the text "You can upload your file here." and a file upload icon. A calendar popup is open over the "Today's date" field, showing the month of February 2021. The calendar has a grid with days of the week (Su, Mo, Tu, We, Th, Fr, Sa) and dates (1-28). The date 4 is highlighted in yellow.



BRANCHING LOGIC



BRANCHING LOGIC

- Determines what question the survey participant will see next
- First you have to create the question which you want to ask as a follow-up question
- Click on the green arrows to create branching logic

Variable: ownership

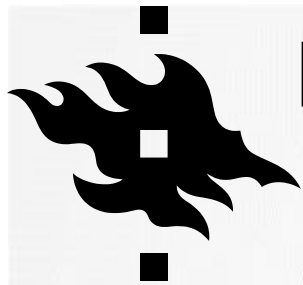
Do you own a pet? Yes
 No
** must provide value* [How to embed a field elsewhere](#) [reset](#)

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

Variable: pets

Which pet(s) do you own? cat
 dog
 rabbit
 snake
** must provide value* [How to embed a field elsewhere](#)

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



BRANCHING LOGIC

- You can use Drag-N-Drop for this or the Advanced Branching Logic Syntax

- Branching logic affects question numbers:

Alert

NOTICE: Branching logic in surveys causes question numbers to display incorrectly when using question auto numbering because it hides the entire question. Thus, the question numbering for this survey has now been automatically set to 'custom numbered' to prevent this issue.

Close

Add/Edit Branching Logic

Choose method below for the following field: **pets** - Which pet(s) do you own?

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

Show the field ONLY if...

[ownership] = '1'

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

Clear logic

— OR —

Drag-N-Drop Logic Builder

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

table = (define criteria)	→
ownership = Yes (1)	→
ownership = No (0)	→
season_favorite = Winter (1)	→
season_favorite = Spring (2)	→
season_favorite = Summer (3)	→
season_favorite = Fall (4)	→
my_first_instrument_complete = Incomplete (0)	→

Drag and Drop

Show the field ONLY if...

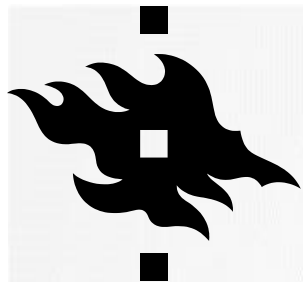
ALL below are true

ANY below are true

ownership = Yes (1) ✖







Clear logic

Save Cancel









BRANCHING LOGIC

An example of how branching logic is used:

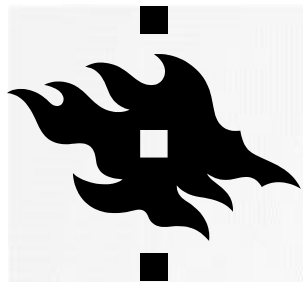
      Variable: ownership How to embed a field elsewhere

Do you own a pet? Yes
 No
** must provide value* reset

Add Field Add Matrix of Fields

      Variable: pets Branching logic: [ownership] = '1' How to embed a field elsewhere

Which pet(s) do you own? cat
 dog
 rabbit
 snake
** must provide value*



BRANCHING LOGIC

- This is how the survey participants see this:
when they choose **No**, there is no follow-up question

Do you own a pet? Yes
** must provide value* No reset

Which is your favorite season? ▼
** must provide value*

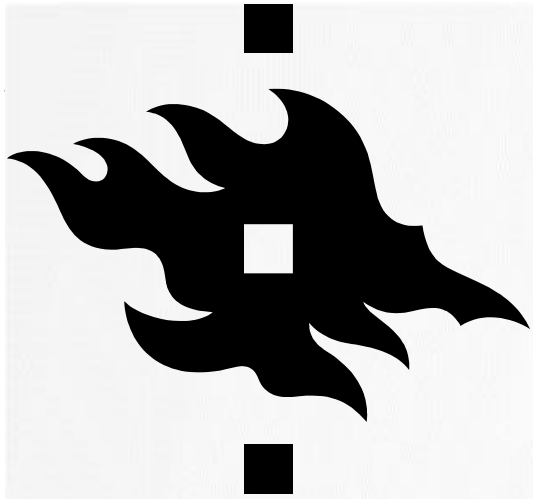
Submit

Do you own a pet? Yes
** must provide value* No reset

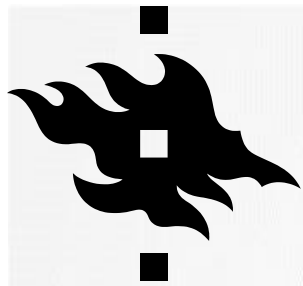
Which pet(s) do you own? cat
** must provide value* dog
 rabbit
 snake

Which is your favorite season? ▼
** must provide value*

Submit



MATRIX OF FIELDS



PROJECT SETUP: ONLINE DESIGNER: ADD MATRIX OF FIELDS

- You can have a matrix of fields in your instrument:

Variable: record_id

* This field will NOT be displayed on the survey page.
* You should NOT use identifiers (e.g., MRN, SSN) for the record ID field.

Record ID

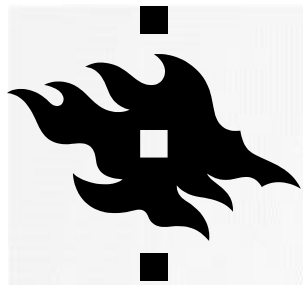
NOTE: The field above is the record ID field and thus cannot be deleted or moved. It can only be edited.

Add Field Add Matrix of Fields Import from Field Bank

Variable: name

nimesi

Add Field Add Matrix of Fields Import from Field Bank



PROJECT SETUP: ONLINE DESIGNER: ADD MATRIX OF FIELDS

- Matrix header text is optional
- Give the fields a label and a variable name
- Add the choices
- Decide whether you can have more than one selection per column
- Give your matrix a group name

Edit Matrix of Fields

You may add or edit a matrix (i.e. grid) of project fields on this data collection instrument by completing the fields below. By providing all necessary info below and clicking Save, the new matrix of fields will be added to the form on this page. A Field Label and Variable name must be provide for each field in the matrix, and you must also set the Choices (i.e. matrix column headers) and answer format (Single Answer vs. Multiple Answers) for the entire matrix. [View a matrix example](#) or [Read more about matrix fields on the help & FAQ.](#)

Matrix Header Text (optional)
Put these things in order of importance to you for choosing where to live?
Expand

Matrix Rows Enable auto naming of variable based upon its Field Label?
Each row represents a different field with its own label and variable name.

Field Label	Variable Name <small>ONLY letters, numbers, and underscores</small>	Question Number <small>(optional)</small>	Required?	*Field Annotation ?
affordable housing	affordable		<input type="checkbox"/>	<input type="text"/> ✖
transport	transport		<input type="checkbox"/>	<input type="text"/> ✖
closeness to nature	nature		<input type="checkbox"/>	<input type="text"/> ✖

Matrix Column Choices [Copy existing choices](#)
Choices (one choice per line)
1, least important
2, neutral
3, most important

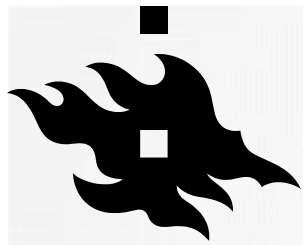
Other Matrix Info

Answer Format:
Single Answer (Radio Buttons) ▾

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

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



PROJECT SETUP: ONLINE DESIGNER: ADD MATRIX OF FIELDS

Matrix group: where_to_live

Put these things in order of importance to you for choosing where to live?

Variable: affordable (One selection allowed per column) least important neutral most important

affordable housing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	reset
--------------------	-----------------------	-----------------------	-----------------------	-------

Variable: transport How to embed a field elsewhere

transport	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	reset
-----------	-----------------------	-----------------------	-----------------------	-------

Variable: nature How to embed a field elsewhere

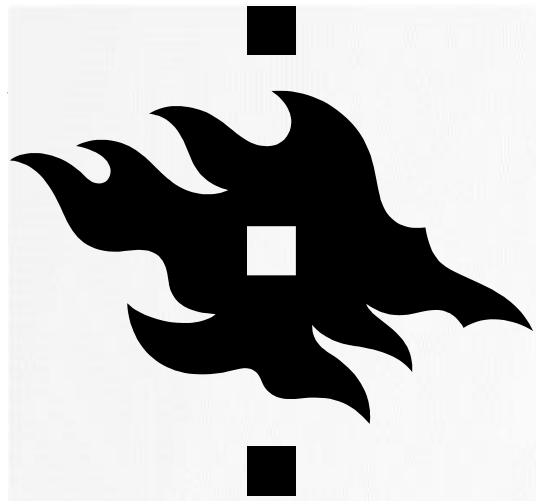
closeness to nature	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	reset
---------------------	-----------------------	-----------------------	-----------------------	-------

Put these things in order of importance to you for choosing where to live?

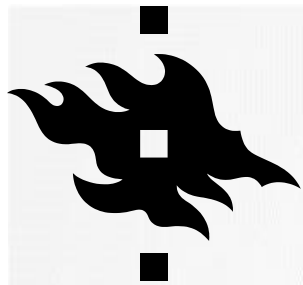
(One selection allowed per column) least important neutral most important

affordable housing	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	reset
transport	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	reset
closeness to nature	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	reset

Value removed!



ACTION TAGS



PROJECT SETUP: ONLINE DESIGNER: ACTION TAGS

- Action Tags special terms that begin with the '@' sign that can be placed inside a field's Field Annotation when adding or editing a field.
- Each action tag has a corresponding action that is performed for the field when displayed on data entry forms and survey pages.
- You can use as many as you want for a single field, but if you do use more than one tag for a field, make sure to put a space or line break between them.

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:

Question Number (optional)

Field Label Use the Rich Text Editor

Action Tags / Field Annotation (optional)

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

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

How to use: Smart Variables Piping Field Embedding

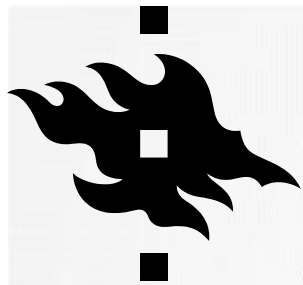
Validation? (optional)
- or -
-- select ontology service --

Required?* No Yes
* Prompt if field is blank

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

Custom Alignment
Align the position of the field on the page

Field Note (optional)
Small reminder text displayed underneath field



PROJECT SETUP: ONLINE DESIGNER: ACTION TAGS

- You can use action tag for masking email

Add @PASSWORDMASK Masks the value of a Text field so that the true value is not visible on the webpage after it has been entered (like password fields on login pages)

Edit Field

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

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

Question Number (optional)

Field Label: email

Variable Name: email

Validation? (optional): Email

Required?*: No Yes

Identifier? No Yes

Custom Alignment: Right / Vertical (RV)

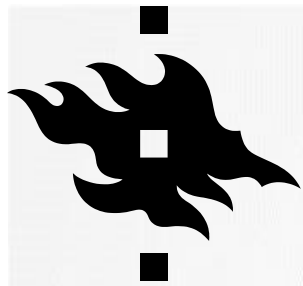
Field Note (optional)

Action Tags / Field Annotation (optional): @PASSWORDMASK

Save Cancel

- This is what it looks like in a survey:

email Disclaimer



PROJECT SETUP: ONLINE DESIGNER: ACTION TAGS

- Action Tag for maximum number of checked boxes: @MAXCHECKED
- Determine what is the maximum number of boxes the survey participant can check, in this example it is 2:

Logic Editor

Use the text box below to compose your logic, calculation, action tags, etc. If you need more space, click the Fullscreen Mode button to enlarge the text box. When you are finished, click the 'Update' button to minimize the Editor window. Learn how to use [Smart Variables](#) [Special Functions](#) [Action Tags](#) or open the [Codebook](#)

@MAXCHECKED=2

Fullscreen Mode Update & Close Editor Cancel

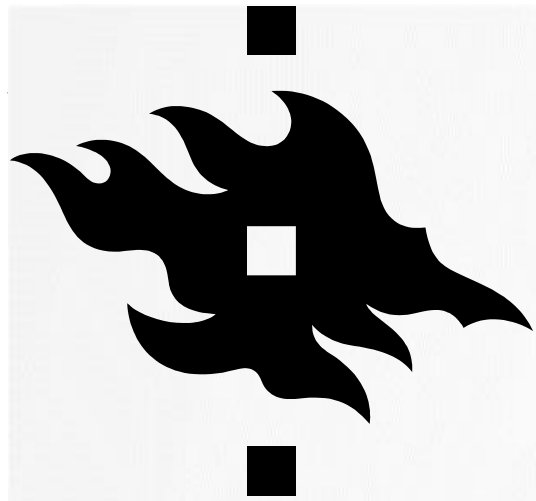
Add @MAXCHECKED

Allows a checkbox field to have a maximum number of checkboxes that can be checked. If other checkbox options are clicked after the maximum has been reached, those choices will not be able to be checked. The format must be @MAXCHECKED=#, in which # is a positive integer. For example, @MAXCHECKED=3 will allow a maximum of 3 checkbox choices to be checked. NOTE: This action tag can only be utilized by Checkbox fields, and it does not get enforced during data imports.

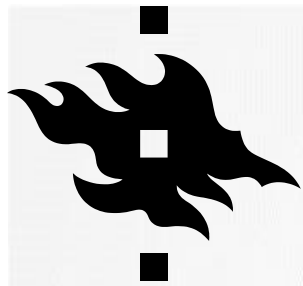
Which colors do you like?

- blue
- green
- yellow
- red

Cannot select choice! The maximum number of choices has been selected.



STOP ACTION



PROJECT SETUP: ONLINE DESIGNER: STOP ACTION

- You can have a stop action when the survey participant answers in the certain way:

Variable: color4

Which colors do you like?

blue
 green
 yellow
 red

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

- Choose what triggers the stop action:

Set up Stop Actions for this Survey Question

Stop Actions (for survey questions only):

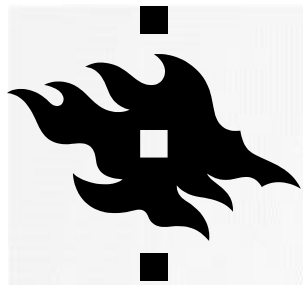
The survey participant will be prompted to end the survey when ANY choices checked below are selected for this question on the survey. Stop Actions will not be enabled on the form when viewing in REDCap as an authenticated user, but only become enabled when a participant views this data collection instrument as a survey.

Please note that there are other Stop Action settings on the Survey Settings page for a given instrument, such as the ability to set custom text when a survey ends via Stop Action.

Which colors do you like? [Select All](#) | [Deselect All](#)

blue
 green
 yellow
 red

[Save](#) [Close](#)



PROJECT SETUP: ONLINE DESIGNER: STOP ACTION

- Stop action is now used in this field:

Variable: color4

Which colors do you like?

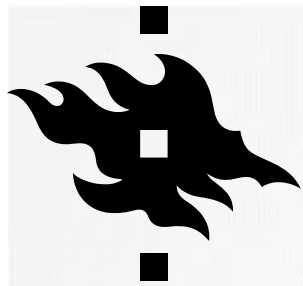
blue

green

yellow

red [End Survey]

Add Field Add Matrix of Fields Import from Field Bank



PROJECT SETUP: ONLINE DESIGNER: STOP ACTION

- Survey participants see this prompt when stop action is triggered:

A screenshot of a survey question titled "Which colors do you like?". The question has four radio button options: "blue", "green", "yellow", and "red". The "red" option is selected and circled in red. A modal dialog box titled "End the survey?" is overlaid on the question. The dialog box contains the text: "You have selected an option that triggers this survey to end right now. To save your responses and end the survey, click the 'End Survey' button below. If you have selected the wrong option by accident and/or wish to return to the survey, click the 'Return and Edit Response' button." At the bottom of the dialog box are two buttons: "End Survey" and "Return and Edit Response".

Which colors do you like?

blue

green

yellow

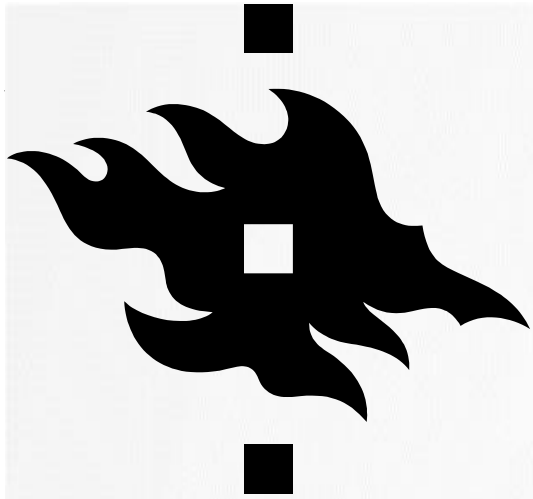
red

End the survey?

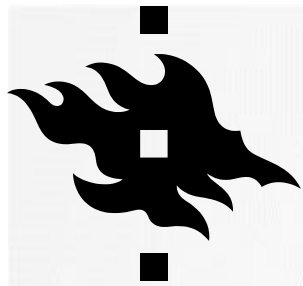
You have selected an option that triggers this survey to end right now.

To save your responses and end the survey, click the 'End Survey' button below. If you have selected the wrong option by accident and/or wish to return to the survey, click the 'Return and Edit Response' button.

End Survey Return and Edit Response

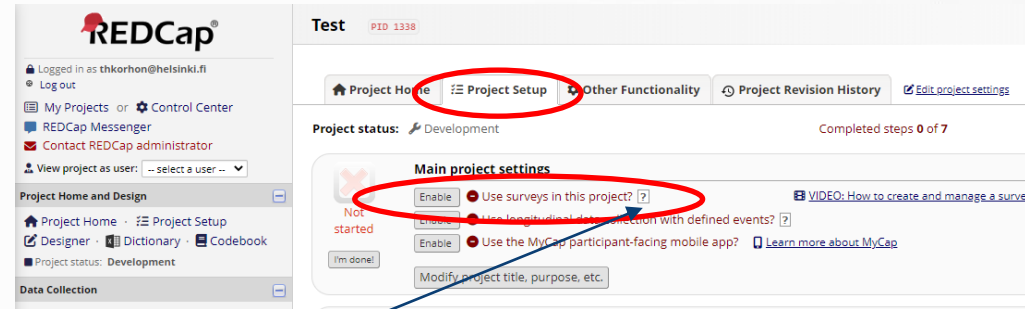


SETTING UP A SURVEY

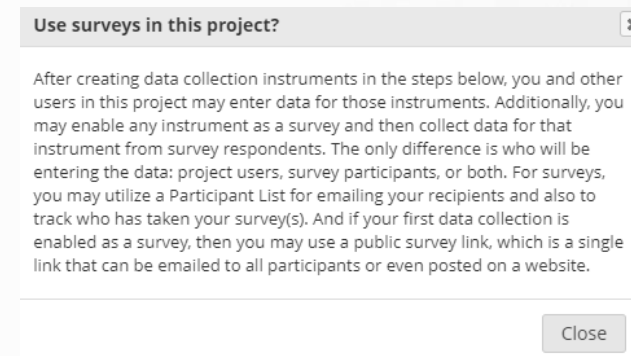


ENABLE SURVEYS IN MAIN PROJECT SETTINGS

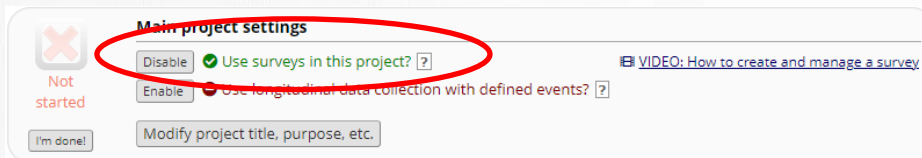
- **Enable surveys** in Project Setup tab in the Main project settings if you are creating a survey!



- By clicking on the question mark you can learn more about this function



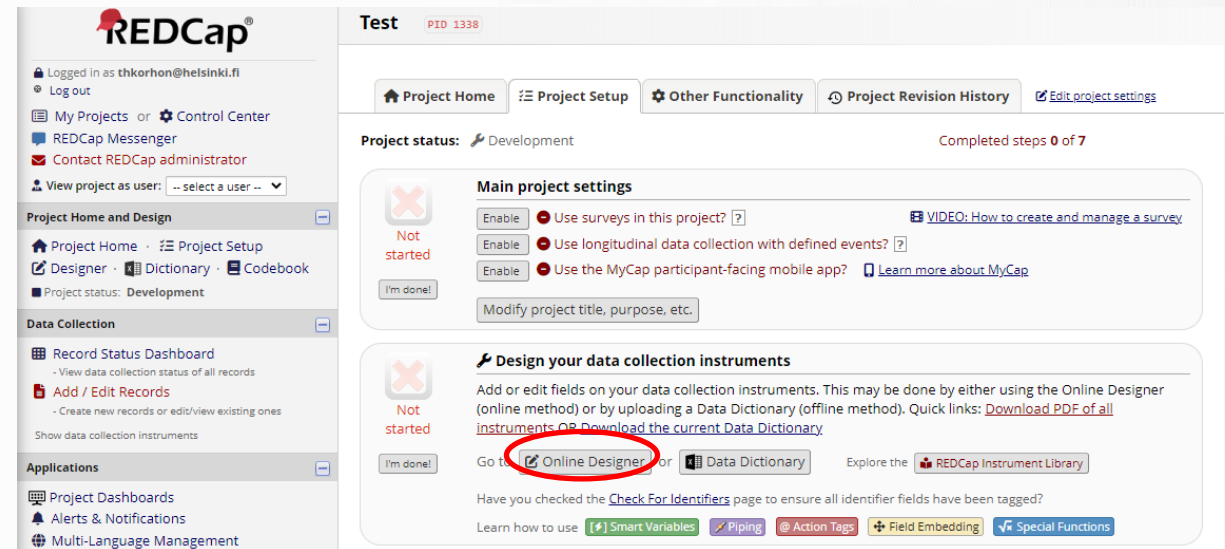
- Now surveys are enabled:





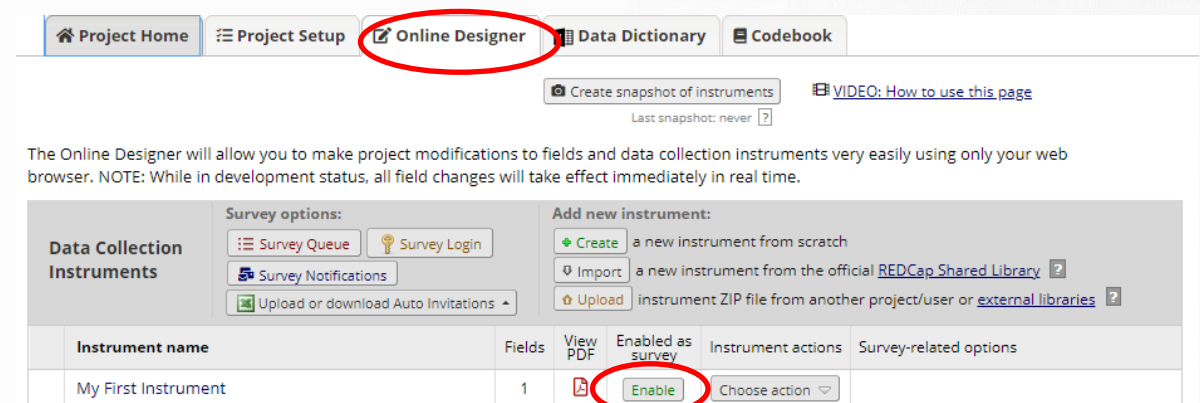
SET UP MY SURVEY

- If you want to use surveys click **'Enable'** in Online Designer as well > you are directed to 'set up my survey' page



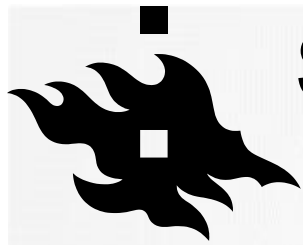
The screenshot shows the REDCap Project Setup page for a project named 'Test' (PID 1338). The page is in 'Development' status. The left sidebar contains navigation options like 'Project Home and Design', 'Data Collection', and 'Applications'. The main content area has tabs for 'Project Home', 'Project Setup', 'Other Functionality', and 'Project Revision History'. Under 'Project Setup', there are sections for 'Main project settings' and 'Design your data collection instruments'. In the 'Main project settings' section, the 'Use surveys in this project?' checkbox is currently disabled. In the 'Design your data collection instruments' section, the 'Online Designer' button is circled in red.

- **NOTE:** You don't see 'Enable' here, if you haven't enabled surveys in the project setup page.



The screenshot shows the REDCap Online Designer page. The 'Online Designer' tab is circled in red in the top navigation bar. Below the navigation bar, there are buttons for 'Create snapshot of instruments' and a video link 'VIDEO: How to use this page'. A text block explains that the Online Designer allows for easy project modifications. Below this, there are sections for 'Survey options' and 'Add new instrument:'. At the bottom, there is a table of instruments. The 'Enabled as survey' column for the instrument 'My First Instrument' has an 'Enable' button circled in red.

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
My First Instrument	1		Enable	Choose action	



SET UP MY SURVEY

- When you click 'enable' in Online Designer you are directed to **survey settings**
- Here you set up the design and customize your survey
- Survey title and instructions for your participants.
- You can add a logo to your survey and there are different font and color options (Survey theme)

Project Home Project Setup Online Designer **Set Up My Survey**

You may utilize any data collection instrument as a survey by enabling the instrument on this page. Data may still be collected on the instrument via normal data entry on the form, but enabling it as a survey allows for the additional option of collecting data via survey by respondents.

Set up my survey for data collection instrument "My First Instrument" Save Changes Cancel

Basic Survey Options:

- Survey Title** My First Instrument
- Survey Instructions** (Displayed at top of survey after title) Please complete the survey below. Thank you!

Survey Design Options:

- Logo** Add new logo: Choose File No file chosen. (Images wider than 600 pixels will be downsized to fit page.)
 If using a logo, hide survey title on survey page?
- Use enhanced radio buttons and checkboxes?** (Includes Yes/No and True/False fields) Standard radios and checkboxes Show example
- Size of survey text** Large
- Font of survey text** Open Sans
- Survey theme** Default Customize

Survey design preview (sample survey): Expand

This is the survey title

Your survey instructions will go here. The instructions can tell your survey participant about the purpose of the as well as what to expect once they have completed the survey. Below is a listing of various question types that be displayed on your survey.

This is a section header to divide the survey page into sections.

Survey Customizations:

- Question Numbering** Auto numbered



SET UP MY SURVEY: SURVEY CUSTOMIZATIONS

- Question numbering can be automatic or customized
- You can have your survey on one page or one section per page
- You choose whether the participants can download a pdf of their answers
- You choose whether you allow participants to see aggregated survey results
- There's also Text-to-Speech functionality (doesn't work with Finnish or Swedish)

Survey Customizations:

Question Numbering
For custom numbering, each question's number will be blank by default until manually added via the Online Designer or Data Dictionary. Auto numbered

Question Display Format
One page or multiple pages? Section headers, which begin new sections on the instrument, will serve as the page break in a multi-page survey, in which each page will begin with a section header. All on one page

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)

Allow participants to download a PDF of their responses at end of survey?
Display a button for the participant to download a PDF file of their responses for the survey they just completed. No

This option will not be available if the Survey Auto-continue or Survey Queue auto-start option is enabled. Also, if a field utilizes the @HIDDEN action tag, it will not be displayed in the PDF.

Survey-specific email invitation field
Designate an email field for sending survey invitations for this survey only. -- select a field --

Note: This option will override the project-level email invitation field (if enabled on the Project Setup page) and will also override any email address originally entered into the Participant List. Also, if this field has no value and the project-level email field is enabled, then the project-level email field's value will be used instead.

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? Disabled

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.

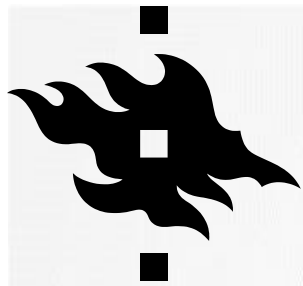
Additional settings:

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.) Disabled

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).

NOTICE: All text that is spoken is sent to a service hosted at Vanderbilt University that utilizes the IBM Watson 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. [Administrators: How to disable this feature](#)



SET UP MY SURVEY: SURVEY ACCESS

- Decide how many responses you will collect
- You can have a time limit for survey completion
- You can set an expiration date
- You can allow a save and return option for respondents

Survey Access:

Response Limit (optional)
(Maximum number of responses to collect. Prevents respondents from starting the survey after a set number of responses have been collected.) ?

(e.g., 150) If left blank, the response limit will not be enforced.

Will include

Custom text to display to respondent on survey when limit is reached:

Time Limit for Survey Completion (optional)
(The amount of time that each respondent has to complete the survey based on when they were initially sent the survey invitation. Note: This feature excludes public survey links.)

days hours minutes

If the respondent loads the survey after this time has passed, it will not allow them to begin or continue the survey. (If all are left blank, the time limit will not be enforced.)

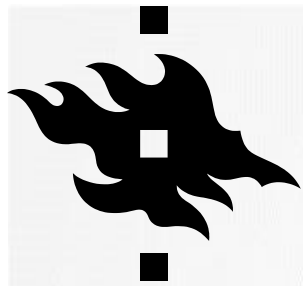
Survey Expiration (optional)
(Time after which the survey will become inactive.) ?

D.M.Y H:M

The time must be for the time zone **Europe/Helsinki**, in which the current time is 03.02.2021 10:18.

Allow respondents to return without needing a return code ?
NOTE: If you are collecting identifying information (e.g., PII, PHI), for privacy reasons it is HIGHLY recommended that you leave the option unchecked so as to enforce a return code.

Allow respondents to return and modify completed responses ?



SET UP MY SURVEY: SURVEY TERMINATION OPTIONS

- Compose a survey completion text
- Redirecting to next survey if applicable

Survey Termination Options:

(Optional) Auto-continue to next survey: Automatically start the next survey instrument after finishing this survey [?]

— OTHERWISE —

Redirect to a URL
(Redirect to a webpage when survey is completed)

Provide a full URL, e.g. `http://www.example.com/mypage.html, [survey-url:other_survey]`
[How to use Piping here](#)

— OR —

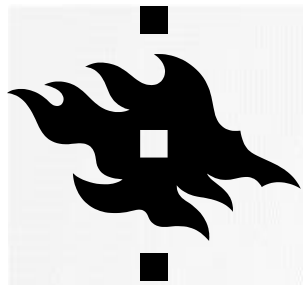
Survey Completion Text
(Displayed after survey is completed as 'thank you' text or as acknowledgement text)

Paragraph **B** *I*

Thank you for taking the survey.

Have a nice day!

[How to use Piping here](#)



SET UP MY SURVEY: STOP ACTIONS

- you can use **Stop actions** in your survey: survey is terminated if a participant gives a certain kind of answer
- You determine the stop actions in the Online Designer where you design your data collection instrument
- Compose a survey completion text when the stop action has been triggered

Options related to Survey Stop Actions:

Prevent survey responses from being saved if the survey ends via Stop Action?
If a Stop Action triggers the end of the survey, you may choose to keep the submitted responses or to prevent them from being saved as data in the project.

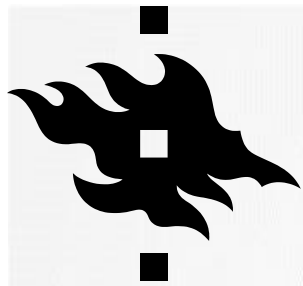
Save all survey responses regardless of Stop Action being triggered (default) ▼

WARNING: If any data has been saved on the survey instrument prior to the Stop Action being triggered, that data will be deleted. For example, if the survey is a multi-page survey in which data has been entered on previous pages prior to triggering the Stop Action, all data collected thus far in that survey will be deleted as if the survey was never taken. Additionally, if the record does not contain data in any other instruments, the entire record itself will be deleted during this process.

Alternate Survey Completion Text (optional)
This completion text is ONLY displayed when a Stop Action triggers the end of the survey. If left blank, the standard Survey Completion Text will be used.

Paragraph ▼ — B I U

[How to use Piping here](#)



SET UP MY SURVEY: SURVEY TERMINATION OPTIONS

- You can archive a PDF of the responses to your project's archive
- You can send a confirmation email after completing the survey
- REMEMBER TO SAVE CHANGES!

e-Consent Framework
- and -

PDF Auto-Archiver

Upon survey completion, a compact PDF copy of the survey response will be automatically stored in the project's File Repository, from which the archived PDFs can be downloaded at any time.

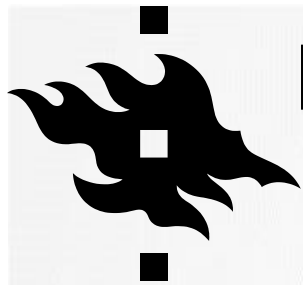
Send confirmation email (optional)?
(Email the respondent when they complete the survey)

Disabled
 Auto-Archiver enabled
 Auto-Archiver + e-Consent Framework [What is the e-Consent Framework?](#)
(includes end-of-survey certification & archival of PDF consent form)

▾

Save Changes

-- Cancel--



MODIFYING SURVEY SETTINGS

- You can return to modifying your survey settings: Online Designer: Survey Settings
- Even in production status you can modify survey settings in real time

The screenshot shows the REDCap Online Designer interface. At the top, there is a navigation bar with buttons for 'Project Home', 'Project Setup', 'Online Designer' (highlighted with a red circle), 'Data Dictionary', and 'Codebook'. Below the navigation bar, there are buttons for 'Create snapshot of instruments' and a link to a video 'VIDEO: How to use this page'. A text box indicates 'Last snapshot: never'. A paragraph explains that the Online Designer allows for easy project modifications and that changes take effect immediately in real time. Below this, there are sections for 'Data Collection Instruments' and 'Add new instrument'. The 'Data Collection Instruments' section includes buttons for 'Survey Queue', 'Survey Login', 'Survey Notifications', and 'Upload or download Auto Invitations'. The 'Add new instrument' section includes buttons for 'Create', 'Import', and 'Upload'. At the bottom, there is a table with columns for 'Instrument name', 'Fields', 'View PDF', 'Enabled as survey', 'Instrument actions', and 'Survey-related options'. The table contains one row for 'My First Instrument' with 11 fields, a PDF icon, a green checkmark, and a 'Choose action' dropdown menu. The 'Survey settings' button in the 'Survey-related options' column is highlighted with a red circle.

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
My First Instrument	11			Choose action	Survey settings + Automated Invitations



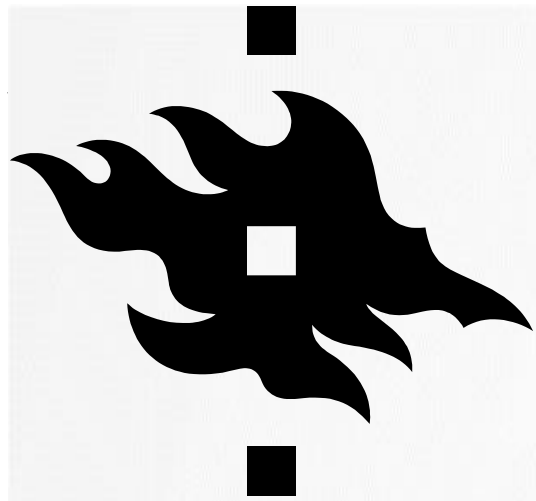
SURVEY SETTINGS

- Do you want to receive an email when someone completes a survey?
- Set it up in Online Designer: Survey Notifications

The screenshot shows the REDCap Online Designer interface. The 'Online Designer' tab is selected and circled in red. Below the navigation bar, there are buttons for 'Create snapshot of Instruments' and 'Last snapshot: never'. A text box explains that the Online Designer allows for easy project modifications. Below this, the 'Survey options' section is visible, with 'Survey Notifications' circled in red. A modal window titled 'Email notifications for survey responses' is open, showing a table with columns for 'My First Instrument', 'Recipient email address', and 'Notifications Enabled'. The 'Notifications Enabled' column for the first row has a green checkmark circled in red.

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey related options
My First Instrument	27			Choose action	Survey settings + Automated Invitations

My First Instrument	Recipient email address	Notifications Enabled
thkorhon@helsinki.fi (Tuija Korhonen)	tuija.korhonen@helsinki.fi (Primary)	

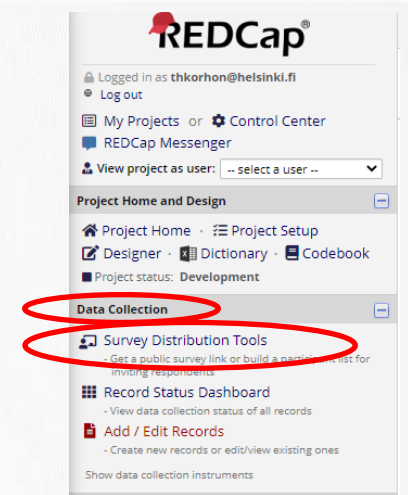


DISTRIBUTING YOUR SURVEY



SURVEY DISTRIBUTION TOOLS

- You don't see **Survey Distribution Tools** at all in the left hand panel if you haven't enabled surveys in your project.
- If you haven't enabled surveys for your project in the Online designer, you see this text when you click survey distribution tools (it's not enough to enable surveys in the project setup phase)

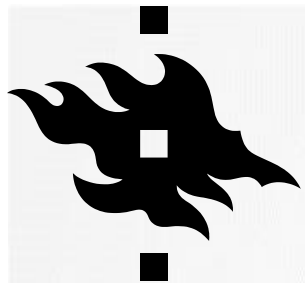


Enable my survey(s) ✕

NOTICE: You cannot utilize the 'Survey Distribution Tools' page until you have first enabled one or more surveys. You may enable surveys here on the Online Designer by clicking the Enable button for any given data collection instrument. Once you have enabled an instrument as a survey, you may collect data for it by distributing surveys by utilizing the 'Survey Distribution Tools' page on the left-hand menu.

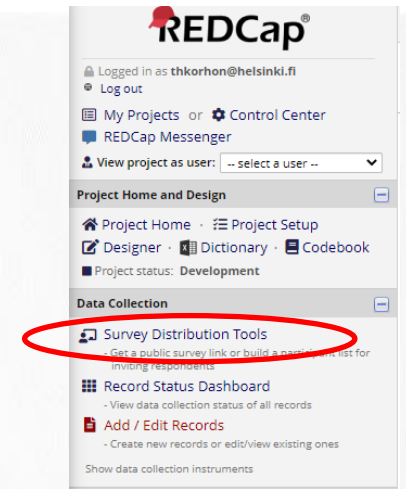
Close

- Remember to set up your survey settings and **save** them!



SURVEY DISTRIBUTION TOOLS: PUBLIC SURVEY LINK

- **Open Public Survey** link: you can view your survey form
- You can create a short survey link or Custom Survey Link
- Link can also be embedded



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:

Link Actions

[Open public survey](#)

[Open public survey + Log out](#)

[Send me URL via email](#)

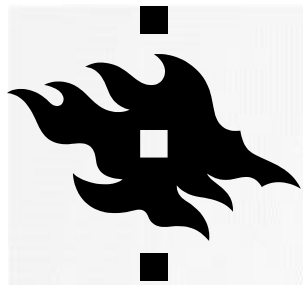
[Survey Access Code or QR Code](#)

Link Customizations

[Get Short Survey Link](#)

[Create Custom Survey Link](#)

[Get Embed Code](#)



SURVEY DISTRIBUTION TOOLS: PARTICIPANT LIST

- You can add and track that the survey participants have answered the survey
- Here you can compose your survey invitations

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 [Initial survey] "My First Instrument" Remove all participants

Displaying -- ALL -- of 0 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 participants have been added							

REDCap®

Logged in as thkorhon@helsinki.fi
Log out

My Projects or Control Center
REDCap Messenger

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

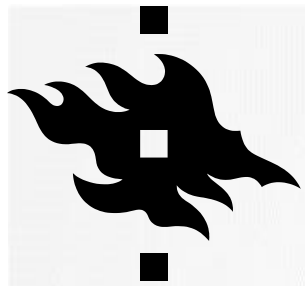
Project Home and Design

- 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

Show data collection instruments

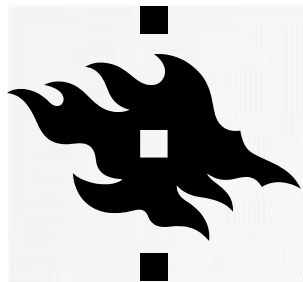


SURVEY DISTRIBUTION TOOLS: COMPOSE SURVEY INVITATIONS

- Determine the time when the email is sent
- Compose your survey invitation

The screenshot shows the 'Send a Survey Invitation to Participants' interface. The 'Info' section includes 'Survey title: My First Instrument'. The 'When should the emails be sent?' section has 'Immediately' selected. The 'Compose message' section is highlighted with a red circle and contains a rich text editor with the following content: 'Please take this survey. You may open the survey in your web browser by clicking the link below: [survey-link] If the link above does not work, try copying the link below into your web browser: [survey-url]'. A 'Participant List' table is shown on the right, currently empty with the message 'No participants exist'. The interface includes a 'Send test email' button and a 'Send Invitations' button at the bottom right.

Participant List		Actions: -- check/uncheck participants --				
(those who have not responded completely)						
<input checked="" type="checkbox"/>	Email	(0 selected)	Participant Identifier	Scheduled?	Sent?	Responded?
No participants exist						



SURVEY DISTRIBUTION TOOLS: SURVEY INVITATION LOG

- Here you can follow the sent invitations and whether there are responses

Survey Distribution Tools

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

Listed below are the survey invitations that have already been sent or have been scheduled to be sent to survey participants in this project. For each invitation it displays the participant email, participant identifier (if exists), survey name, and the date/time in which the invitation was (or will be) sent. You may even view the invitation email itself by clicking the icon in the 'View Email' column. Please note that all times below correspond to the time zone "Europe/Helsinki", in which the current time is 28.02.2023 13:59.

Survey Invitation Log
(in ascending order by time sent)

View past invitations | View future invitations

Displaying 1 - 1 of 1

Begin time: 28.02.2023 13:59 End time: (D.M.Y H:M)

Display All invitation types (excluding deleted invitations) and All response statuses

Display All surveys

Display All records

Display invitation reminders?

Apply filters | Reset | Download log (as seen below) | Delete all selected

Invitation send time	View Invite	Participant Email	Record	Participant Identifier	Survey	Survey Link	Responded?	Errors (if any)	
28.02.2023 13:59		[undisclosed email address]			Form 1				

REDCap

Logged in as thkorhon@helsinki.fi
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

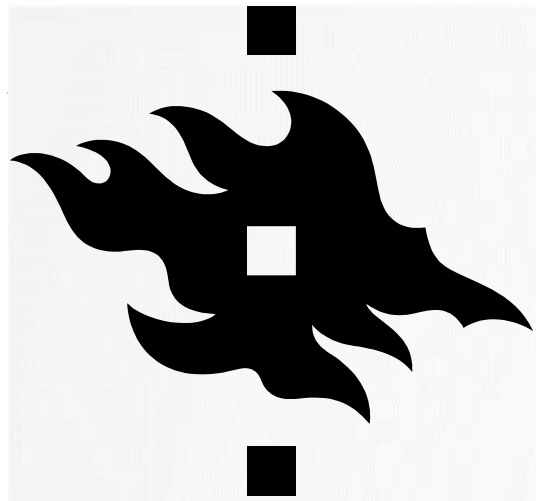
Data Collection

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

Show data collection instruments



MOVING TO PRODUCTION



- **Test your project thoroughly** before moving to production stage



Not started

I'm done!

Test your project thoroughly

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

The screenshot shows the REDCap project settings interface for a project named "suuri sydän (Elisan koulutus_elokuu_2021)". The page is organized into several sections, each with a status indicator (Completed, Not completed, or Not started) and a list of configuration options. The "Test your project thoroughly" section is circled in red. The "User Rights and Permissions" section is also visible, with links to "User Rights" and "Data Access Groups".



PRODUCTION STATUS

- If you need to make changes after your project is in production status, changes need to be made in draft mode and can be either auto-approved or need to be approved by a REDCap admin.



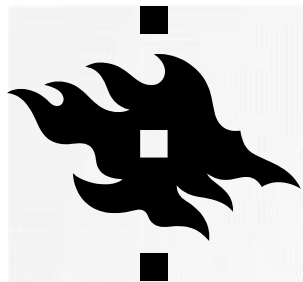
Move your project to production status

Move the project to production status so that real data may be collected. Once in production, you will not be able to edit the project fields in real time anymore. However, you can make edits in Draft Mode, which will be auto-approved or else might need to be approved by a REDCap administrator before taking effect.

Go to [Move project to production](#)


The screenshot shows the REDCap project settings page for 'suuri sydan (Eliisan koulutus_elo_kuu_2021)'. The page is divided into several sections, each with a 'Completed' or 'Not completed' status indicator. The sections include:

- Main project settings:** Includes options for 'Use surveys in this project?', 'Use longitudinal data collection with defined events?', and 'Use the MyCap participant-facing mobile app?'. A 'Modify project title, purpose, etc.' button is also present.
- Design your data collection instruments:** Provides instructions on adding or editing fields on data collection instruments, with links to 'Online Designer' and 'Data Dictionary'.
- Define your events and designate instruments for them:** Offers options to 'Define My Events' or 'Designate Instruments for My Events'.
- Enable optional modules and customizations:** Lists various modules like 'Repeating instruments and events', 'Auto-numbering for records', and 'Scheduling module' with 'Enable' buttons.
- Set up a randomization model:** Explains the randomization module and provides a 'Set up randomization' button.
- Set up project bookmarks (optional):** Describes custom bookmarks and provides an 'Add or edit bookmarks' button.
- User Rights and Permissions:** Discusses granting access to other users and provides 'User Rights' and 'Data Access Groups' buttons.
- Test your project thoroughly:** A 'Not started' section with a 'Go to' button.
- Move your project to production status:** A 'Not started' section with a 'Move project to production' button circled in red.



PRODUCTION STATUS

- You will need to click 'I Agree' in the pop up text when you want to move it to production.
- And again you are reminded about testing.



Not started

Move your project to production status

Move the project to production status so that real data may be collected. Once in production, you will not be able to edit the project fields in real time anymore. However, you can make edits in Draft Mode, which will be auto-approved or else might need to be approved by a REDCap administrator before taking effect.

Go to [Move project to production](#)

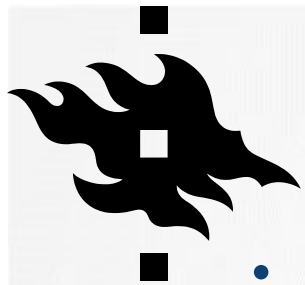
NOTICE ✕



Before going from testing to production stage, please make sure that:

- You have approval from your Ethical Review Board (**if required**)
<https://tenk.fi/en/ethical-review/ethical-review-finland>
- You have done the Data Protection Preliminary Evaluation. See the **Data protection guide for researchers** in Flamma
<https://flamma.helsinki.fi/en/group/tutkimuksen-tuki/tutkimuksen-tietosuoja-asiat>
 - You have done a Data Protection Impact Assessment (**if required**)
- You have a Data Protection Notice (Privacy Notice) for informing research participants
- You have thoroughly tested all forms, variables and project settings (emailings, scheduling, etc) so that no more changes are required

[I Agree](#) [Cancel](#)



PRODUCTION STATUS

- You can start collecting real data
- Choose whether you want to keep data that has been saved or whether it can be deleted
- Make sure you have tagged **identifiers!** > data can be deidentified when moved outside REDCap

Move Project To Production Status? ✕

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

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

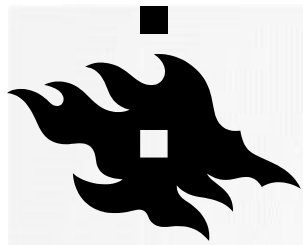
Keep existing data or delete?

Keep ALL data saved so far. (1 records)

Delete ALL data, calendar events, documents uploaded for records/responses, survey responses (if applicable), and any logging events pertaining to data collection.

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

YES, Move to Production Status Cancel



PRODUCTION STATUS

- Make sure you have tagged identifiers! > data can be deidentified when moved outside REDCap
- When moving to production status, you can check for identifiers

Check For Identifiers

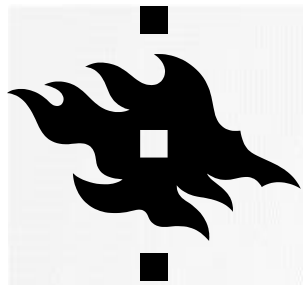
This module will help you assess whether or not some fields may be identifiers, and then allows you to easily tag such fields as identifiers for greater data security. While this same process can be accomplished in the Data Dictionary or Online Designer, this page provides a streamlined way of tagging fields as identifiers very quickly. Based off the variable name or field label, the fields listed below may possibly contain identifiers (e.g., name, phone number, address). Please review the entries and select all identifiers, where appropriate. Any fields already tagged as identifiers will already be checked below.

My First Instrument

Variable Name	Field Label	Identifier?
record_id	Record ID	<input type="checkbox"/>
name	<div class="rich-text-field-label"><p>What is your name?</p></div>	<input checked="" type="checkbox"/>
age	What is your age?	<input type="checkbox"/>
date	Today's date	<input type="checkbox"/>

Update Identifiers

Cancel



PRODUCTION STATUS

- You can see the status of your project in many places

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

Project status: Production Completed steps 4 of 7

Project Home and Design

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

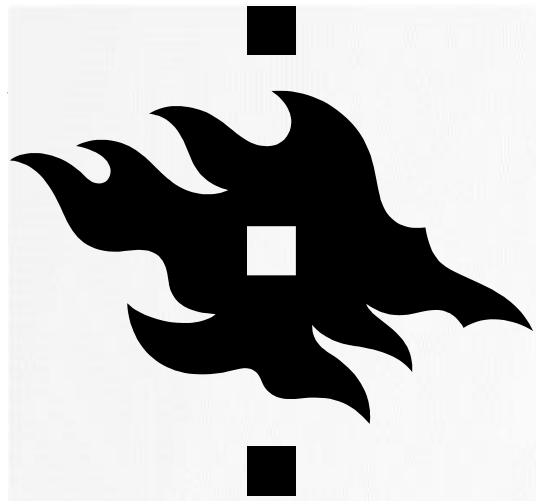
Project Status Management

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

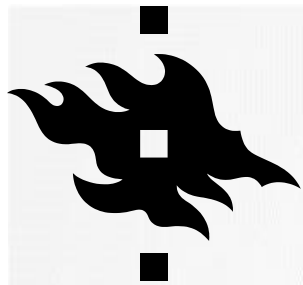
My Projects

Project Title	PID	Records	Fields	Instruments	Type	Status
Unorganized Projects (2)						
IMDC Autumn 2020 Course Feedback	25	4	21	1 survey		<input checked="" type="checkbox"/>
REDCap training - overview and basic functions	37	42	9	1 survey		<input checked="" type="checkbox"/>
tests (5)						

Production

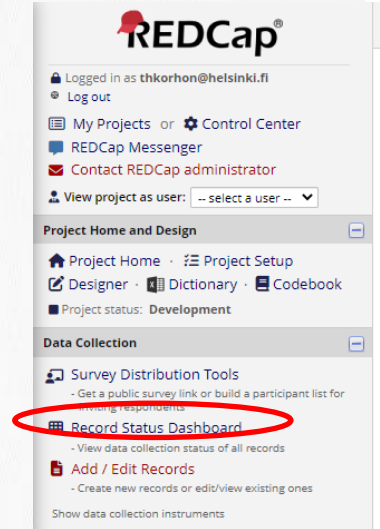


DATA COLLECTION: ADDING AND EDITING RECORDS



DATA COLLECTION: RECORD STATUS DASHBOARD

- In record status dashboard you can see the status of the records
- The icons indicate what is the status of the record: is it complete, incomplete or unverified; whether it is incomplete, partial or completed survey response:



Record Status Dashboard (all records)

Displayed below is a table listing all existing records/responses and their status for every data collection instrument (and if longitudinal, for every event). You may click any of the colored buttons in the table to open a new tab/window in your browser to view that record on that particular data collection instrument. Please note that if your form-level user privileges are restricted for certain data collection instruments, you will only be able to view those instruments, and if you belong to a Data Access Group, you will only be able to view records that belong to your group.

Legend for status icons:

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

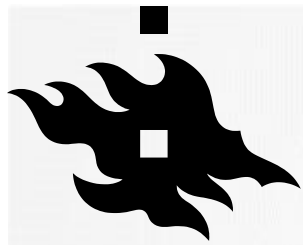
Dashboard displayed: [Default dashboard] [Create custom dashboard](#)

Displaying record Page 1 of 1: "1" through "4" of 4 records ALL (4) records per page

[+ Add new record](#)

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

Record ID	My First Instrument
1	
2	
3	
4	



DATA COLLECTION: RECORD STATUS DASHBOARD

- You can edit the record by clicking on the icon:

Record ID	Form 1
1	
2	
3	
4	
5	
6	
7	

Form 1 Invitation status: Survey options

Editing existing Record ID 6.

Record ID 6
To rename the record, see the record action drop-down at top of the [Record Home Page](#).

What is your name? * must provide value
erokerg
muistinpano

email Disclaimer

What is your favorite color? yellow

Do you have a favorite color? Yes No reset

New section

Which colors do you like?
 blue
 green
 yellow
 red

Which colors do you like?
 blue
 green
 yellow
 red



DATA COLLECTION: ADD / EDIT RECORDS INSIDE REDCAP

- You can add records inside REDCap: click 'Add new record':

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: 7

Choose an existing Record ID

+ Add new record

Data Search

Choose a field to search (Excludes multiple choice fields)

Search query

- And start filling in the fields, remember to save!:

Testi 5 PID 85

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

My First Instrument

Assign record to a Data Access Group?

Adding new Record ID 2

Record ID 2

What is your favorite ice cream flavor?
 vanilla
 strawberry
 chocolate
 other

This begins a new section.

What is your name?
* must provide value

What is your age?
* must provide value

Today's date
sad neutral happy

How do you feel today?
* must provide value
Change the slider above to see a response

You can upload your file here. [Upload file](#)

Do you own a pet?
* must provide value
 Yes
 No

Which is your favorite season?
* must provide value

Put these things in order of importance to you for choosing where to live?
(One selection allowed per column.) least important neutral most important

affordable housing

REDCap

Logged in as thkorhon@helsinki.fi
[Log out](#)

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

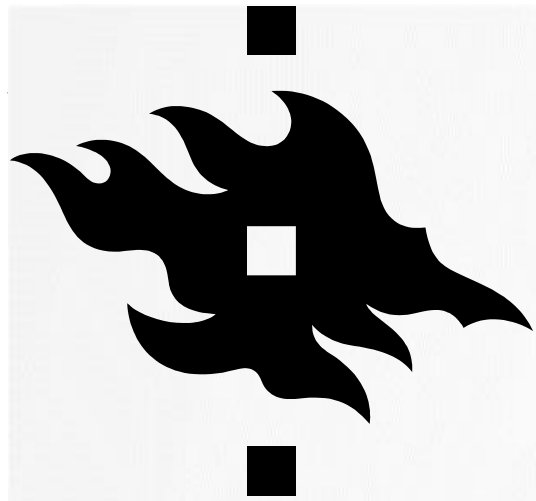
View project as user:

Project Home and Design

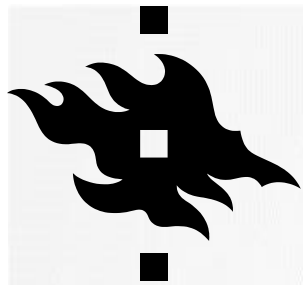
[Project Home](#) · [Project Setup](#)
[Designer](#) · [Dictionary](#) · [Codebook](#)
Project status: **Production**

Data Collection

[Survey Distribution Tools](#)
[Record Status Dashboard](#)
+ Add / Edit Records
Show data collection instruments



OTHER FUNCTIONALITY



OTHER FUNCTIONALITY

- **Project Status management:**
You can move your project to analysis/cleanup status
- **In Data management:**
 - Request to delete the project (including the data)
 - Request to erase all data currently collected
- Copying the project or downloading a backup

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

Project Status Management

Development → Production (current) → Analysis/Cleanup

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

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

Mark project as Completed If you are finished with a project and wish to make it completely inaccessible, you may mark the project as 'Completed'. Doing so will take it offline and remove it from everyone's project list, after which it can only be seen again by clicking the [Show Completed Projects](#) link at the bottom of the [My Projects](#) page. [Read more](#)

Data Management

X Delete the project You may completely remove this project, in which all its data will be permanently deleted also. **(Administrators Only)**

Erase all data You may erase all currently collected data in the project (including any survey responses), calendar events, documents uploaded onto forms/surveys, and all archived data export files stored in the File Repository, and any logged events that pertain to data collection. **(Administrators Only)**

Clear the Record List Cache (Administrators only) If there appear to be records missing from the project (in reports, record status dashboards, or elsewhere), then the Record List Cache (a secondary list of all record names) might be out of sync and thus might need to be cleared. Clearing the cache will cause the Record List Cache to regenerate and bring back records that appear to be orphaned/missing in the project. (NOTE: This is normally not needed.)

Copy or Back Up the Project

Copy the Project **Make an exact duplicate of this project.** All project fields will be copied over, and you will be prompted to set the title and info for the new project. You may choose to copy or not copy the existing data in the current project to the new one.

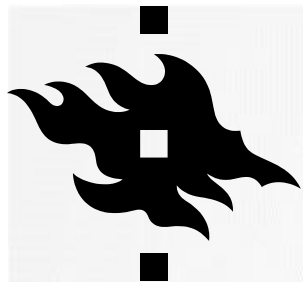
Download metadata only (XML) **Download a backup of this project.** The entire project (all records, instruments, fields, and project attributes) can be downloaded as a single XML file (CDISC ODM format). This XML file can be used to create a clone of the project (including its data, optionally) on this REDCap server or on another REDCap server (it can be uploaded on the Create New Project page). Because it is in CDISC ODM format, it can also be used to import the project into another ODM-compatible system.

Download metadata & data (XML)

Include the following in the XML file:

- User Roles
- Surveys and survey settings

NOTE: The exported XML file does *not* contain the project's logging history (audit trail), but if you wish to obtain it, you may freely download it any time at the top of the Logging page.



ANALYSIS/CLEANUP STATUS

Project Status Management

Development → Production (current) → Analysis/Cleanup

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

← Move back to Development status Moved to production too soon? You may move the project back to development status, if needed. **(Administrators Only)**

Mark project as Completed If you are finished with a project and wish to make it completely inaccessible, you may mark the project as 'Completed'. Doing so will take it offline and remove it from everyone's project list, after which it can only be seen again by clicking the [Show Completed Projects](#) link at the bottom of the *My Projects* page. [Read more](#)

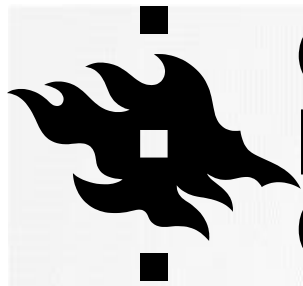
Data Management

Delete the project You may completely remove this project, in which all its data will be permanently deleted also. **(Administrators Only)**

Erase all data You may erase all currently collected data in the project (including any survey responses), calendar events, documents uploaded onto forms/surveys, and all archived data export files stored in the File Repository, and any logged events that pertain to data collection. **(Administrators Only)**

Clear the Record List Cache (Administrators only) If there appear to be records missing from the project (in reports, record status dashboards, or elsewhere), then the Record List Cache (a secondary list of all record names) might be out of sync and thus might need to be cleared. Clearing the cache will cause the Record List Cache to regenerate and bring back records that appear to be orphaned/missing in the project. (NOTE: This is normally not needed.)

- Move the project to Analysis/Cleanup status if data collection is complete. This will disable most project functionality, although all collected data will remain intact.
- Once in Analysis/Cleanup status, the project can be moved back to Production status at any time.
- In Analysis/Cleanup status many features are disabled, such as surveys, Alerts & Notifications, Automated Survey Invitations, and other features typically used during data collection. Also, no new records can be created while in this status.
- You can also mark your project as completed. Marking a project completed moves it offline.



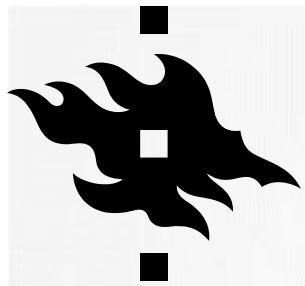
OTHER FUNCTIONALITY: MOVE PROJECT TO ANALYSIS/ CLEANUP STATUS

Move Project To Analysis/Cleanup Status? ✕

Do you wish to set the status of the project to ANALYSIS/CLEANUP? You and other users will NOT be able to access the project while it is in Analysis/Cleanup status.

YES, Move to Analysis/Cleanup Status

Cancel



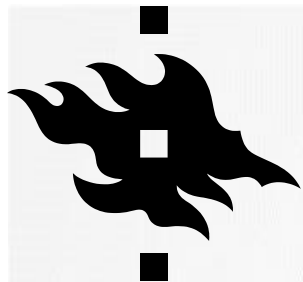
OTHER FUNCTIONALITY: MARK PROJECT AS COMPLETED

Mark project as Completed ✕

Are you sure you wish to mark this project as 'Completed'? This will take the project offline, and you and other users will no longer be able to access it. The project and its data will remain in the system and cannot be modified. Only a REDCap administrator may return the project back to its previous status.

Mark project as Completed

Cancel



COMPLETED PROJECT

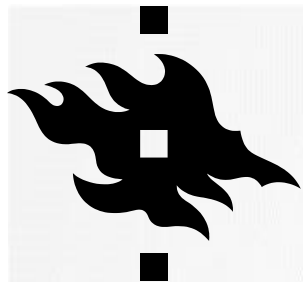
- When the project is marked completed, it is hidden from everyone's project list. You can see it only by clicking on 'Show Completed Projects'

My Projects + New Project Help & FAQ Training Videos Send-It Messenger Control Center

kysely	1144	11	7	1 survey	■	✎
Matriisi kokeilu	1161	7	9	1 survey	■	✎
matriisi kokeilu 2	1162	0	3	1 survey	■	✎
15.12.2022 REDCap koulutus	1174	0	16	1 survey	■	✎
15.12.2022 REDCap koulutus kopio	1184	0	16	1 survey	■	✎
testaus Katrin kanssa xml	1185	0	16	1 survey	■	✎
Lisää testausta xml Katrin kysely	1186	0	40	3 forms 1 survey	■	✎
xml-testaus	1187	0	40	3 forms 1 survey	■	✎
koodien lähettäminen	1231	2	12	4 surveys	■	✎
pakollisia ja valloituja kenttiä	1278	0	6	1 survey	■	✎
testi 15.2.2023	1315	2	9	1 survey	■	✎
PDF kokeilu	1327	11	9	1 survey	■	✎
+ tests (47)						
+ REDCap (2)						
+ eläinlääkis (2)						
+ DMP Workshop (8)						
+ IMDC (3)						
+ ilmoittautuslomakkeet (1)						
+ new (1)						
- Other (3)						
Kokeilu 25	708	1	50	1 survey	■	✎
3.3.2022	783	6	14	1 survey	■	✎
kokeilu 15.12.2022	1168	0	2	1 survey	■	✎
[My Hidden Projects] (4)						
Show Completed Projects						

PDF kokeilu

+ tests (47)						
- REDCap (2)						
REDCap training - overview and basic functions	37	69	9	1 survey	■	✎
Feedback from REDCap Training	47	8	9	1 survey	■	✓
+ eläinlääkis (2)						
+ DMP Workshop (8)						
+ IMDC (3)						
+ ilmoittautuslomakkeet (1)						
+ new (1)						
+ Other (3)						
[My Hidden Projects] (4)						



DELETING PROJECT AND ITS DATA

Project Status Management

Development → Production (current) → Analysis/Cleanup

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

← Move back to Development status Moved to production too soon? You may move the project back to development status, if needed. **(Administrators Only)**

Mark project as Completed If you are finished with a project and wish to make it completely inaccessible, you may mark the project as 'Completed'. Doing so will take it offline and remove it from everyone's project list, after which it can only be seen again by clicking the [Show Completed Projects](#) link at the bottom of the *My Projects* page. [Read more](#)

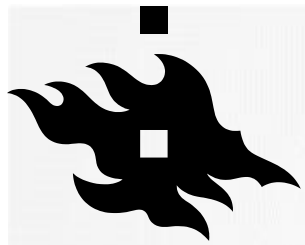
Data Management

Delete the project You may completely remove this project, in which all its data will be permanently deleted also. **(Administrators Only)**

Erase all data You may erase all currently collected data in the project (including any survey responses), calendar events, documents uploaded onto forms/surveys, and all archived data export files stored in the File Repository, and any logged events that pertain to data collection. **(Administrators Only)**

Clear the Record List Cache (Administrators only) If there appear to be records missing from the project (in reports, record status dashboards, or elsewhere), then the Record List Cache (a secondary list of all record names) might be out of sync and thus might need to be cleared. Clearing the cache will cause the Record List Cache to regenerate and bring back records that appear to be orphaned/missing in the project. (NOTE: This is normally not needed.)

- Only admins can delete projects, but you can request your project to be deleted.
- You can also request all the data to be erased
- (this screenshot is from an admin)



OTHER FUNCTIONALITY: MAKE A COPY OF THE PROJECT

- You can make a copy of your project
- You can also copy the current users and records in the project (these are optional)

Make a Copy of the Project

To make an exact duplicate of the current project ("Testi 5"), set the details below for the new project you are creating, and click the button at the bottom. This will copy over all project forms and their fields, and optionally, you may also copy the current users and any reports that have been created.

Project title:
Title to be displayed on project webpage

Purpose of this project:
How will it be used?

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

NOTICE:
Since your project contains one or more surveys, please note that although you may change the project title above for your new project, all survey settings (including the survey title) for each survey will be copied and remain as-is in the copied project. If want to change your survey titles, survey instructions, or other settings after copying this project, you are welcome to do so on the Online Designer page using the Survey Settings button for each data collection instrument.

The titles of your surveys are listed below:
• **My First Instrument**

Also copy the following: (optional)

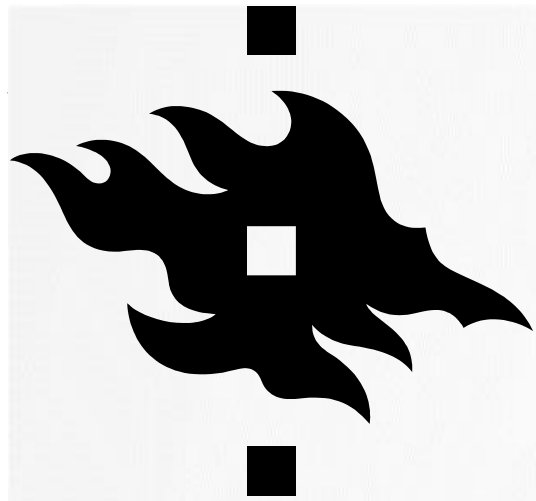
- All records/responses (1 records total)
- All users and user rights
- All users roles
- All reports
- All report folders
- All data quality rules
- All Project Folders
- All settings for Survey Queue and Automated Survey Invitations

Note: Automated Invitations will all be set to 'Not Active' status in the new project.

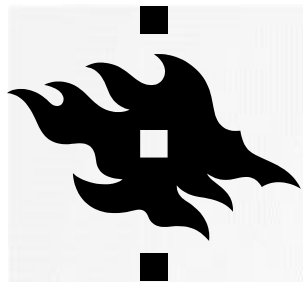
- All project bookmarks
- All custom record status dashboards
- All alerts & notifications

Note: Alerts & Notifications will all be set to 'Deactivated' status in the new project.

[Select All](#) | [Deselect All](#)



PROJECT REVISION HISTORY



PROJECT REVISION HISTORY

- Here you can see when the project was created, when it was moved to production and whether there have revisions since it was moved to production

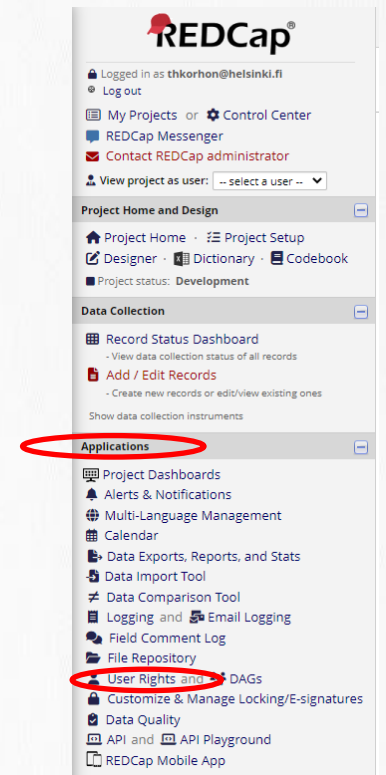
The tables below list information about when major changes and revisions were made to the project. The first table below displays when the project was created, and if the project is in production, lists the time it was moved to production, as well as any revisions made to the project fields while in production. You may also download any of the Data Dictionaries from past revisions. The table at the bottom displays general statistics with regard to the times of project changes and revisions.

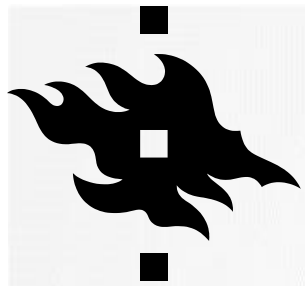
Project Revision History			
Created project	18.12.2020 08:15	-	Created by thkorhon@helsinki.fi (Tuija Korhonen)
Moved to production	18.12.2020 14:36	Download data dictionary	Moved to production by thkorhon@helsinki.fi
Production revision #1 (current)	12.01.2021 16:51	Download data dictionary	Requested by thkorhon@helsinki.fi (Tuija Korhonen) Approved automatically

Project Revision Statistics	
Time since project creation	49,0 days
Time in development	0,3 days
Time in production	48,8 days
Time since last revision	23,7 days
Average / median time between revision	25,1 days / 25,1 days



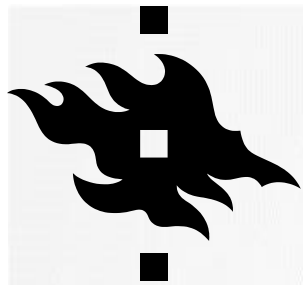
APPLICATIONS: USER RIGHTS AND DATA ACCESS GROUPS





VARIOUS USER RIGHTS FOR DIFFERENT USERS AND GROUPS

- With "User Rights" you can grant different access rights to the project, e.g. in order to protect sensitive data
- The 'Logging' function is an action log that allows you to inspect who has done what
- With Data Access Groups (DAGs) you can define which group can access what data --> this is especially suitable for larger research groups and joint projects of research groups
- Participants/study subjects receive link to the survey. No need for any rights to the REDCap system.



USER RIGHTS

- You can only give rights to people who already have an account in UH's REDCap
- Start by writing the name and choose the correct one from the list

This page may be used for granting users access to this project and for managing the user privileges of those users. You may also create roles to which you may assign users (optional). User roles are useful when you will have several users with the same privileges because they allow you to easily add many users to a role in a much faster manner than setting their user privileges individually. Roles are also a nice way to categorize users within a project. In the box below you may add/assign users or create new roles, and the table at the bottom allows you to make modifications to any existing user or role in the project, as well as view a glimpse of their user privileges.

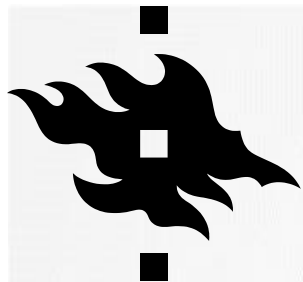
Add new users: Give them custom user rights or assign them to a role.

— OR —

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

(e.g., Project Manager, Data Entry Person)

Role name (click role name to edit role)	Username or users assigned to a role (click username to edit or assign to role)	Expiration (click expiration to edit)	Project Design and Setup	User Rights	Data Access Groups	Data Export Tool	Reports & Report Builder	Graphical Data View & Stats	Survey Distribution Tools	Calendar
—	allardt@helsinki.fi (Monica Allardt)	never	✓	✓	✓	Full Data Set	✓	✓	✓	✓
—	hepoleht@helsinki.fi (Iina Hepolehto)	never	✓	✓	✓	Full Data Set	✓	✓	✓	✓
—	larmo@helsinki.fi (Katri Larmo)	never	✓	✓	✓	Full Data Set	✓	✓	✓	✓
—	thkorhon@helsinki.fi (Tuija Korhonen)	never	✓	✓	✓	Full Data Set	✓	✓	✓	✓



USER RIGHTS

- Determine what level of rights you give to the person

Adding new user "allardt@helsinki.fi"

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

Adding new user "allardt@helsinki.fi"

Basic Privileges

Expiration Date (if applicable) (D,M,Y)

Highest level privileges:

- Project Design and Setup
- User Rights
- Data Access Groups

Other privileges:

- Survey Distribution Tools
- Alerts & Notifications
- Calendar
- Add/Edit/Organize Reports
Also allows user to view ALL reports (but not necessarily all data in the reports)
- Stats & Charts
- Data Import Tool
- Data Comparison Tool
- Logging
- File Repository
- Data Quality
What is Data Quality?
 - Create & edit rules
 - Execute rules
- API
What is the REDCap API?
 - API Export
 - API Import/Update

Settings pertaining to the REDCap Mobile App:

- REDCap Mobile App
What is the REDCap Mobile App?
 - Allows user to collect data offline in the mobile app
 - Allow user to download data for all records to the app?

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

- Create Records
- Rename Records
- Delete Records
* Includes ability to delete all data on an instrument or on a repeating event.

Settings pertaining to record locking and E-signatures:

Privileges for Viewing and Exporting Data

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

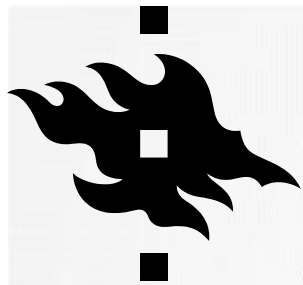
	Data Viewing Rights			Data Export Rights			
	No Access (Hidden)	Read Only	View & Edit	No Access	De-Identified*	Remove All Identifier Fields	Full Data Set
Field Embedding Demo	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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

New User Notification

- Notify user of their project access via email?

Add user Cancel



USER RIGHTS: CREATE NEW ROLES

- You can create roles, then it's faster to give rights: you just assign person to a role
- Possible roles: data entry person, coordinator, administrator, researcher, data manager, monitor...

Project Home | Project Setup | **User Rights** | Data Access Groups

This page may be used for granting users access to this project and for managing the user privileges of those users. You may also create roles to which you may assign users (optional). User roles are useful when you will have several users with the same privileges because they allow you to easily add many users to a role in a much faster manner than setting their user privileges individually. Roles are also a nice way to categorize users within a project. In the box below you may add/assign users or create new roles, and the table at the bottom allows you to make modifications to any existing user or role in the project, as well as view a glimpse of their user privileges.

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

— OR —

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

Role name (click role name to edit role)	Username or users assigned to a role (click username to edit or assign to role)	Expiration (click expiration to edit)	Project Design and Setup	User Rights	Data Access Groups	Data Export Tool	Reports & Report Builder	Graphical Data View & Stats	Survey Distribution Tools	Calendar
—	allardt@helsinki.fi (Monica Allardt)	never	✓	✓	✓	Full Data Set	✓	✓	✓	✓
—	hepoleht@helsinki.fi (Iina Hepolehto)	never	✓	✓	✓	Full Data Set	✓	✓	✓	✓
—	larmo@helsinki.fi (Katri Larmo)	never	✓	✓	✓	Full Data Set	✓	✓	✓	✓
—	thkorhon@helsinki.fi (Tuija Korhonen)	never	✓	✓	✓	Full Data Set	✓	✓	✓	✓

Creating new role "Data Entry person"

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

Creating new role "Data Entry person"

Basic Rights

Highest level privileges:

- Project Design and Setup
- User Rights
- Data Access Groups

Privileges for data exports (including PDFs and API exports), reports, and stats:

- Data Exports
 - No Access
 - De-identified*
* De-identified means that all free-form text fields will be removed, as well as any date/time fields and Identifier fields.
 - Remove all tagged Identifier fields
 - Full Data Set
- Add/Edit/Organize Reports
Also allows user to view ALL reports (but not necessarily all data in the reports)
- Stats & Charts

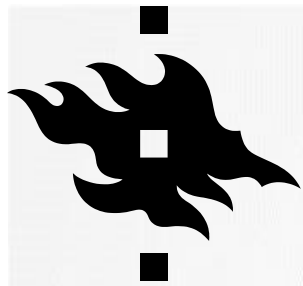
Other privileges:

- Survey Distribution Tools
- Calendar
- Data Import Tool
- Data Comparison Tool
- Logging
- File Repository
- Data Quality
 - Create & edit rules
 - Execute rules

Data Entry Rights

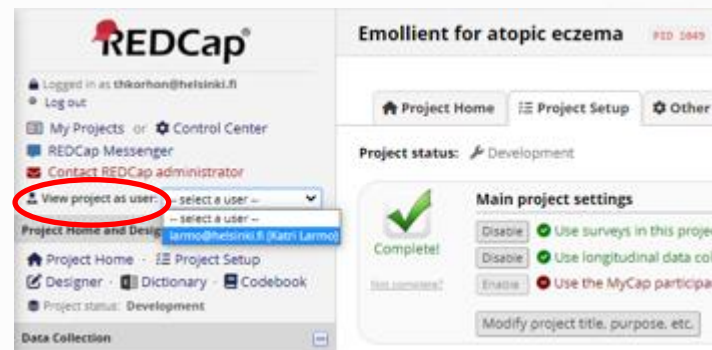
NOTE: The data entry rights "only" pertain to a user's ability to view or edit data on a web page in REDCap (e.g., data entry forms, reports). It has no effect on data imports or data exports.

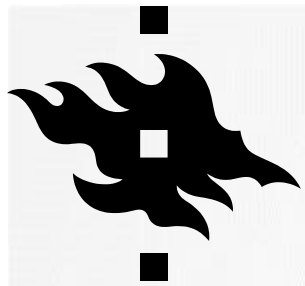
	No Access	Read Only	View & Edit	Edit survey responses
My First Instrument (survey)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>



VARIOUS USER RIGHTS FOR DIFFERENT USERS

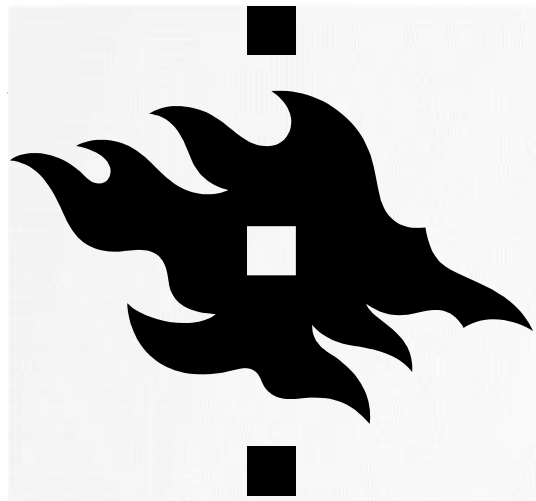
- You can view how different users can view your project



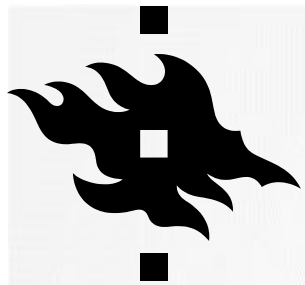


GRANTING USER RIGHTS FOR RESEARCHERS OUTSIDE UNIV OF HELSINKI

- Our license allows only for users who have a user account at the University of Helsinki (also HUS is excluded – HUS has their own REDCap)
- Researchers or research personnel can apply for access rights to the Univ of Helsinki IT system:
<https://helpdesk.it.helsinki.fi/en/instructions/logging-and-connections/user-account/applying-access-rights>



APPLICATIONS: LOGGING



APPLICATIONS: PROJECT LOGGING HISTORY

- In Logging you see everything that has happened in your project:

testi 15.2.2023 PID 1315

Export (CSV): All logging All pages using current filters Current page

Logging

This module lists all changes made to this project, including data exports, data changes, and the creation or deletion of users.

Filter by event: All event types (excluding page views)

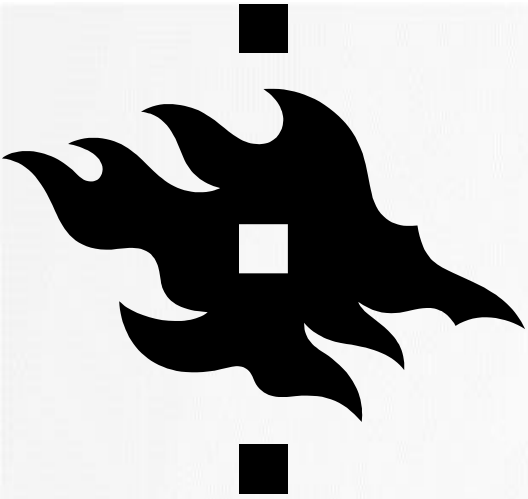
Filter by user name: All users

Filter by record: All records

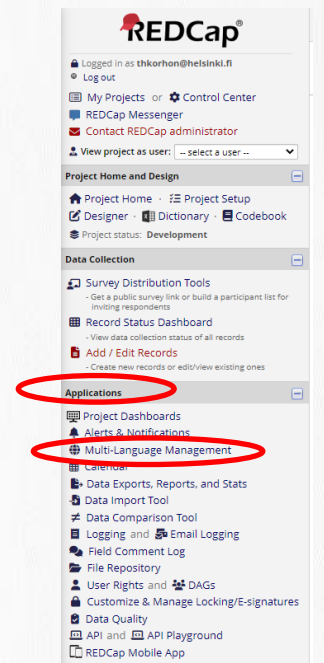
Filter by time range from 19.01.2023 19:21 to

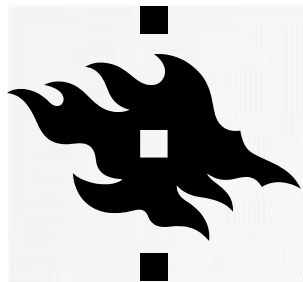
Displaying events (by most recent): 1 - 24 (Page 1 of 1)

Time / Date	Username	Action	List of Data Changes OR Fields Exported
15.02.2023 11:25	thkorhon@helsinki.fi	Manage/Design	Edit project field
15.02.2023 11:25	thkorhon@helsinki.fi	Manage/Design	Add/edit stop actions for survey question
15.02.2023 11:05	thkorhon@helsinki.fi	Manage/Design	Edit project field
15.02.2023 11:05	thkorhon@helsinki.fi	Manage/Design	Edit project field
15.02.2023 11:04	thkorhon@helsinki.fi	Manage/Design	Reorder project fields
15.02.2023 11:04	thkorhon@helsinki.fi	Manage/Design	Create project field
15.02.2023 11:03	thkorhon@helsinki.fi	Manage/Design	Upload document for image/file attachment field
15.02.2023 11:03	thkorhon@helsinki.fi	Manage/Design	Reorder project fields
15.02.2023 11:03	[survey respondent]	Create Response	tietosuojailmoitus = '2', record_id = '1', form_1_complete = '2'
15.02.2023 11:03	thkorhon@helsinki.fi	Manage/Design	Add/edit stop actions for survey question
15.02.2023 11:00	thkorhon@helsinki.fi	Manage/Design	Create project field



APPLICATIONS: MULTI-LANGUAGE MANAGEMENT





MULTI-LANGUAGE MANAGEMENT

- You can start translating the interface by clicking on 'Add a new language':

Multi-Language Management [VIDEO: How to use Multi-Language Management](#)

On this page you can create and configure multiple display languages for your project (for surveys, data entry forms, alerts, survey invitations, etc.) or alternatively export and import translations using a file. Do not forget to **save your changes** (keyboard shortcut: **CTRL+S**) at any time on this page when you are done editing. NOTE: [This page will not auto-translate your text for you](#), but provides tools so that you may easily translate them yourself. [Learn more](#).

Languages **Settings** **Save Changes**

Manage the available languages in this project using the table and options below by following these steps:

1. Create your default language (i.e., used when creating your fields, instruments, etc.). This will serve as the reference for the other languages.
2. Add other languages that you wish to offer as a translation of the default language.
3. Translate your default text into different languages by clicking the tabs above or the icons to the right of each language below.
4. Test your translations by switching back and forth between languages on your data entry forms and/or surveys. Note that only active languages will be available for selection on those places.
5. [Learn how to implement some language-related action tags](#), such as `@LANGUAGE-SET`, if desired. Learn about them here: [@ Action Tags](#)

+ Add a new language

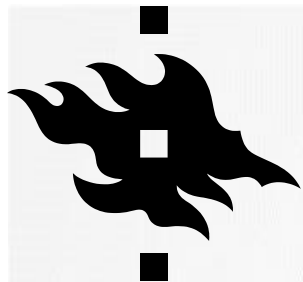
Currently, there are no languages set up in this project.

(Optional) For surveys, designate a field for storing a participant's language preference

Use this feature to set a source for a participant's language preference (their initial language setting). This must be a radio or dropdown field with choices matching the language ID you have defined for each language above, or a text box field with no field validation. The value of this field can be set manually through data entry/data import or with the `@LANGUAGE-CURRENT-FORM/SURVEY` action tags. The value of this setting will dictate the language used for rendering Automated Survey Invitations, Alerts, and PDFs. Text box fields are denoted with [T] while radio and dropdown fields are denoted with [R] and, in case they include all language keys, are highlighted with a green background.

Language preference field:

NOTE: Similar to a designated email field, when this field exists on multiple events in longitudinal projects, on a repeating instrument, or on a repeating event, the field's value will be synchronized across all instances/events so that changing it in one location will change the value across all events/instances where the field appears.



MULTI-LANGUAGE MANAGEMENT

- You can start translating from scratch, just give the language an ID and the display name
- Or you can import the language from system, if the language is available: Click 'Import from file or system', then choose 'suomi':
- Click on 'Add Language':

Add New Language

Language ID
Enter a unique ID for this language

A unique identifier (case-insensitive) for this language. It is recommended to use the ISO code, such as 'en' or 'en-US' for English, or 'es' for Spanish. Use only letters and hyphen. [View list of ISO 639-1 language codes](#)

Language Display Name
Enter a display name

This is the name of the language as shown in the language selectors. This should be entered in its language, such as 'English' or 'Deutsch' (for German).

Sort Override (optional)
Provide alternate name for sorting purposes

If set, this will be used instead of the display name for determining the sort order of languages in language selectors.

Add New Language

Import language data ...

from a file (JSON, CSV, or INI)

Choose or drop file...

Include the following:

- Translations of user interface items
- Translations of project-specific items*

*These include: fields, survey settings, ASIs, alerts, missing data code labels, ...

- or -

from available system languages

-- Select a language to import --

- suomi
- suomi

Add New Language

Language ID
fi

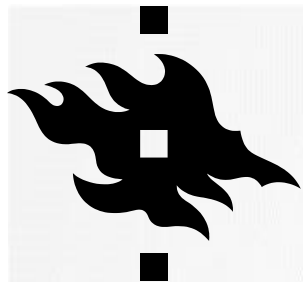
A unique identifier (case-insensitive) for this language. It is recommended to use the ISO code, such as 'en' or 'en-US' for English, or 'es' for Spanish. Use only letters and hyphen. [View list of ISO 639-1 language codes](#)

Language Display Name
suomi

This is the name of the language as shown in the language selectors. This should be entered in its language, such as 'English' or 'Deutsch' (for German).

Sort Override (optional)
Provide alternate name for sorting purposes

If set, this will be used instead of the display name for determining the sort order of languages in language selectors.



MULTI-LANGUAGE MANAGEMENT

- You have to make the language active:
- Remember to save changes!

Multi-Language Management [VIDEO: How to use Multi-Language Management](#)

On this page you can create and configure multiple display languages for your project (for surveys, data entry forms, alerts, survey invitations, etc.) or alternatively export and import translations using a file. Do not forget to **save your changes** (keyboard shortcut: **CTRL+S**) at any time on this page when you are done editing. NOTE: [This page will not auto-translate your text for you](#), but provides tools so that you may easily translate them yourself. [Learn more](#).

🌐 Languages 📄 Forms/Surveys 📢 Alerts ⚙ Misc 🗨 User Interface ⚙ Settings **Save Changes**

Manage the available languages in this project using the table and options below by following these steps:

1. Create your default language (i.e., used when creating your fields, instruments, etc.). This will serve as the reference for the other languages.
2. Add other languages that you wish to offer as a translation of the default language.
3. Translate your default text into different languages by clicking the tabs above or the icons to the right of each language below.
4. Test your translations by switching back and forth between languages on your data entry forms and/or surveys. Note that only active languages will be available for selection on those places.
5. Learn how to implement some language-related action tags, such as `@LANGUAGE-SET`, if desired. Learn about them here: [@ Action Tags](#)

[+ Add a new language](#) Export or import general settings [?]

ID	Display Name	Active	Default	Fallback	RTL [?]	Actions
fi	suomi	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

(Optional) For surveys, designate a field for storing a participant's language preference

Use this feature to set a source for a participant's language preference (their initial language setting). This must be a radio or dropdown field with choices matching the language ID you have defined for each language above, or a text box field with no field validation. The value of this field can be set manually through data entry/data import or with the `@LANGUAGE-CURRENT-FORM/SURVEY` action tags. The value of this setting will dictate the language used for rendering Automated Survey Invitations, Alerts, and PDFs. Text box fields are denoted with [T] while radio and dropdown fields are denoted with [R] and, in case they include all language keys, are highlighted with a green background.

Language preference field:

NOTE: Similar to a designated email field, when this field exists on multiple events in longitudinal projects, on a repeating instrument, or on a repeating event, the field's value will be synchronized across all instances/events so that changing it in one location will change the value across all events/instances where the field appears.



MULTI-LANGUAGE MANAGEMENT

- If you want the new language to be visible in your survey, you have to make it active in surveys as well:

Multi-Language Management [VIDEO: How to use Multi-Language Management](#)

On this page you can create and configure multiple display languages for your project (for surveys, data entry forms, alerts, survey invitations, etc.) or alternatively export and import translations using a file. Do not forget to **save your changes** (keyboard shortcut: **CTRL-S**) at any time on this page when you are done editing. NOTE: This page will not auto-translate your text for you, but provides tools so that you may easily translate them yourself. [Learn more](#).

[Languages](#) [Forms/Surveys](#) [Alerts](#) [Misc](#) [User Interface](#) [Settings](#) [Save Changes](#)

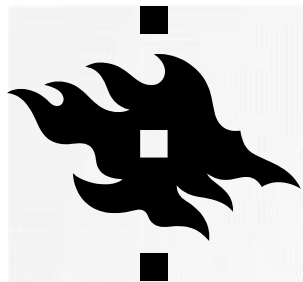
Click a button below to select a language to translate:

[* suomi](#)

This is the default language. Thus, items cannot be edited here, but they can be modified in the *Online Designer* (or via *Data Dictionary* upload) and the *Survey Settings* page. However, fields and individual survey settings can be set to be excluded from translation here. **If you wish to begin/continue translating the default language text, click a language button above.**

Use this page to manage which instruments will be translated, separately in data entry and survey modes. Furthermore, use it to navigate to the various sub-pages, such as field exclusions (default language only), or translations of field items (labels, etc.), survey settings (title, instructions, etc.) and ASI emails.

Instrument	Data Entry	Survey	Fields	Survey Settings	ASIs	Export
Form 1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> Exclude	<input type="checkbox"/> Exclude	—	b



MULTI-LANGUAGE MANAGEMENT

- Now you can either use the translation that you brought from the system or make changes to it in 'User Interface':

Multi-Language Management [VIDEO: How to use Multi-Language Management](#)

On this page you can create and configure multiple display languages for your project (for surveys, data entry forms, alerts, survey invitations, etc.) or alternatively export and import translations using a file. Do not forget to **save your changes** (keyboard shortcut: **CTRL-S**) at any time on this page when you are done editing. NOTE: This page will not auto-translate your text for you, but provides tools so that you may easily translate them yourself. [Learn more.](#)

[Languages](#) [Forms/Surveys](#) [Alerts](#) [Misc](#) [User Interface](#) [Settings](#) [Save Changes](#)

Click a button below to select a language to translate:

[* suomi](#)

You may translate any of the REDCap's stock user interface elements seen on forms/surveys, such as field validation error messages, survey submit buttons, and other things that typically cannot be defined in a project. Please keep in mind that **you probably do not need to translate all user interface items** since it is likely that many of them might not be used on your forms/surveys. Tip: Use the 'highlight' feature on the Settings tab above to highlight all untranslated text on the page as a quick way of determining which specific elements need to be translated.

Filter items on this page: Hide translated items

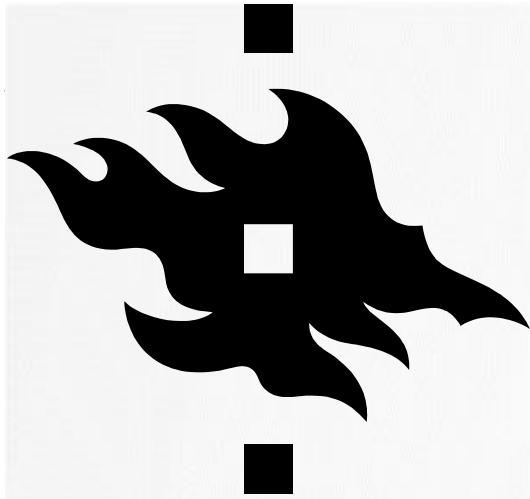
[All](#) [Common](#) [Field Types](#) [Survey](#) [Data Entry](#) [Validation](#) [Protected Email](#) [reCAPTCHA](#)

Controls & Display Elements

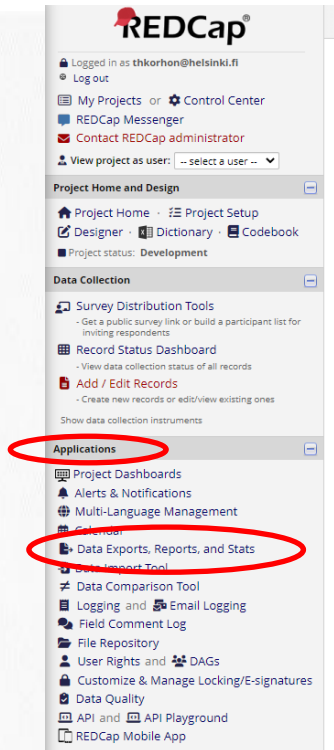
The "Change language" tooltip text:
Default text: [Change language](#)

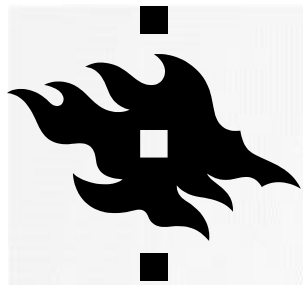
The survey access page languages note:
Default text: [Note, there may be more and/or different languages available after entering the access code.](#)

The "[*DATA REMOVED*]" placeholder text:
Default text: [\[*DATA REMOVED*\]](#)



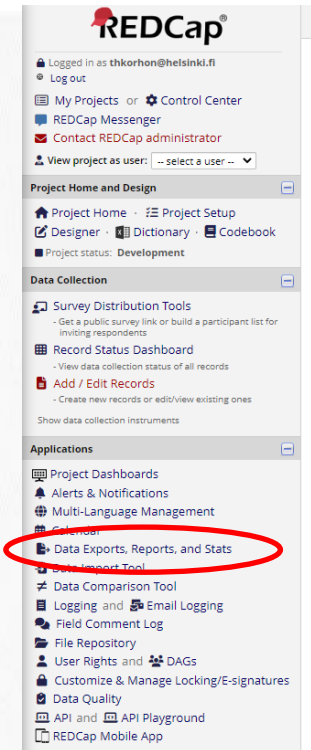
APPLICATIONS: EXPORTING DATA FROM REDCAP





DATA EXPORTS, REPORTS AND STATS

- In Data Exports, Reports and Stats you can export data to other programs or see the statistics of your project:



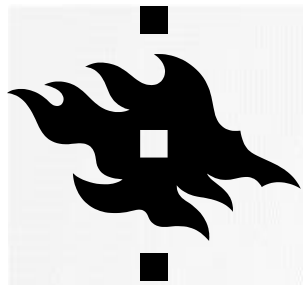
Data Exports, Reports, and Stats

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

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

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

My Reports & Exports					
	Report name	View/Export Options	Management Options	Report ID (auto-generated)	Unique report name (auto-generated)
A	All data (all records and fields)	View Report Export Data Stats & Charts			
B	Selected instruments (all records)	Make custom selections			
+ Create New Report					



DATA EXPORTS, REPORTS AND STATS

- View Report

All data (all records and fields)

Record ID record_id	Survey Identifier redcap_survey_identifier	Survey Timestamp form_1_timestamp	What is your name? name	email email	What is your favorite color? color	Do you have a favorite color? color1	What is your favorite color? color2	Which colors do you like?				W co
								blue color3__1	green color3__2	yellow color3__3	red color3__4	
1		06-07-2021 14:02	TK	asdglkmasd@ksdfjaksdfj.fi	blue (1)	No (0)		Unchecked (0)	Unchecked (0)	Unchecked (0)	Checked (1)	Ur (0)
2		[not completed]						Checked (1)	Unchecked (0)	Unchecked (0)	Unchecked (0)	Cf (1)
3		06-07-2021 15:06	zdxvxzsdv	sdvsdgm@sodlgasdg.com				Checked (1)	Unchecked (0)	Unchecked (0)	Checked (1)	Ur (0)
4		06-07-2021 15:07	dsfö	gadgkj@skgfjla.fi				Unchecked (0)	Unchecked (0)	Unchecked (0)	Unchecked (0)	Ur (0)
5		06-07-2021 15:08	dkfgjladfkg	dsgmsdg@ktjalk.fi		Yes (1)	red (3)	Unchecked (0)	Unchecked (0)	Unchecked (0)	Unchecked (0)	Ur (0)
6			erökerg	tuija.korhonen@hel.sinki.fi	yellow (3)	No (0)		Unchecked (0)	Unchecked (0)	Checked (1)	Checked (1)	Ur (0)
Z		26-02-2023 20:02	Helena	tuija.korhonen@hel.sinki.fi	blue (1)	No (0)		Checked (1)	Checked (1)	Unchecked (0)	Unchecked (0)	Cf (1)



DATA EXPORTS, REPORTS AND STATS

- Stats and Charts:

Number of results returned: 7
Total number of records queried: 7

[View Report](#) [Export Data](#) [Print Page](#)

Live filters: [Record ID] ▼

All data (all records and fields)

DISPLAY OPTIONS

Optional: Select a record to overlay onto the plots below -- select record -- ▼

Viewing options: [Show plots & stats](#) [Show plots only](#) [Show stats only](#)

What is your name? *(name)*

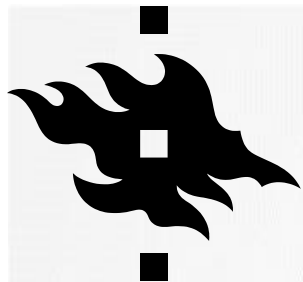
Total Count (N)	Missing*
6	1 (14.3%)

email *(email)*

Total Count (N)	Missing*
6	1 (14.3%)

What is your favorite color? *(color)* [Refresh Plot](#) | [View as Bar Chart](#) ▼

Total Count (N)	Missing*	Unique
3	4 (57.1%)	2










DATA EXPORTS, REPORTS AND STATS

- Export Data

Exporting "All data (all records and fields)"

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

Choose export format

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

De-identification options (optional)

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

Known Identifiers:

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

Free-form text:

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

Date and datetime fields:

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

[Deselect all options](#)

Additional export options

- Export survey identifier field and survey timestamp field(s)?

Advanced data formatting options

Export blank values for gray Form Status?
All Form Status fields with a gray status icon can be exported either as a blank value or as "0" (Incomplete). Hint: Blank values are recommended if the data will be imported back into REDCap, in which this preserves the gray status icons for all the imported records.

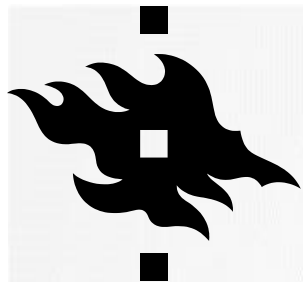
Export gray Form Status fields with value of "0"

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):

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.










INSTEAD OF ANONYMISATION DATA IS DE-IDENTIFIED

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)

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[Deselect all options](#)

Additional export options

- Export survey identifier field and survey timestamp field(s)?

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Export gray Form Status fields with value of "0"

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):

, (comma) - default

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.

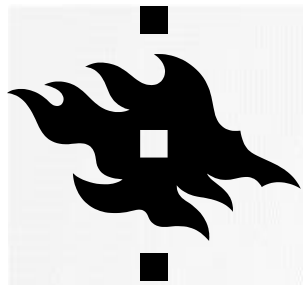
Use fields' native decimal format (default)

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

Data can be de-identified before exporting to statistical analysis programs

Export Data

Cancel










DATA EXPORTS, REPORTS AND STATS

- Export Data into excel: choose whether you want to export raw data or with labels
- In the next window click the excel icon and the file is downloaded

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

Free-form text:

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

Date and datetime fields:

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

[Deselect all options](#)

Additional export options

- Export survey identifier field and survey timestamp field(s)?

Advanced data formatting options

Export blank values for gray Form Status?
All Form Status fields with a gray status icon can be exported either as a blank value or as "0" (Incomplete). Hint: Blank values are recommended if the data will be imported back into REDCap, in which this preserves the gray status icons for all the imported records.

Export gray Form Status fields with value of "0"

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):

. (comma) - default

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.

✓ **Data export was successful!**


The data export was successful, and your data is now ready to be downloaded. Click the download icon(s) below on the right to download your data file. If exporting to a specific statistical analysis package, you will additionally need to download the syntax file that is provided for that stats package. For more details, follow the instructions in the box below.

How to cite publications

When publishing manuscripts relating to this REDCap project, we ask that in your publication you please cite the items listed below that have been utilized in this project. Thank you!


1. Please cite the **official REDCap publications**. [View citation and template methods language](#)
2. Since this project utilizes the **REDCap Mobile App**, please cite the RMS manuscript. [View citation](#)

CSV / Microsoft Excel (labels)

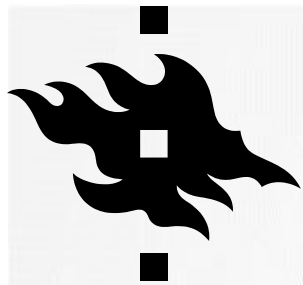
 You may download the survey results in CSV (comma-separated) format, which can be opened in Excel. You have the choice of downloading the data either with the full headers and answer labels or just with the answer codes (i.e. raw data).

NOTE: If you are using a version of Microsoft Excel prior to Excel 2007, due to limitations the data will only be read to 255 columns when opened.

Click icon(s) to download:



Close

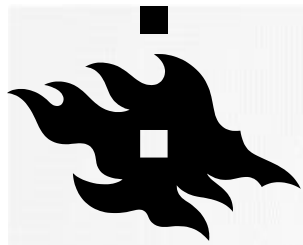


DATA EXPORTS, REPORTS AND STATS

- Export Data into excel
- Data is exported in csv format so all the data is in the first column:

The screenshot shows an Excel spreadsheet with the following data in column A:

Record ID	Survey Timestamp	What is your favorite color?	Do you have a favorite color?	What is your favorite color?	Which colors do you like? (choice=blue)	Which
8a140932444ac82235d181aa6ee03500	"2021-07-06 14:02:58"	blue	No,,	Unchecked,Unchecked,Unchecked,Checked,Unchecked,Checked,Unchecked,Unchecked,neutral	"least im	
bed962fe1512399869a3853a9e6319e0	"[not completed]"	,,,	Checked,Unchecked,Unchecked,Unchecked,Checked,Unchecked,Unchecked,Unchecked,,,,	Incomplete		
424167ef8ff98e24e8e6bfef89ad13cf	"2021-07-06 15:06:37"	,,,	Checked,Unchecked,Unchecked,Checked,Unchecked,Unchecked,Checked,Unchecked,,	"least important",neutral,,		
e11b69618e2fb1f12037701c45a127ca	"2021-07-06 15:07:31"	,,,	Unchecked,Unchecked,Unchecked,Unchecked,Unchecked,Unchecked,Unchecked,Unchecked,Unchecked,Unchecked	"least important",n		
da9b476c02d2e8d68f398c2307696b00	"2021-07-06 15:08:02"	Yes,red	Unchecked,Unchecked,Unchecked,Unchecked,Unchecked,Unchecked,Unchecked,Unchecked,Checked,Unchecked,,,,	Complete		
3ae371e8d94f42316b1b2ac812cf4290	yellow	No,,	Unchecked,Unchecked,Checked,Checked,Unchecked,Unchecked,Unchecked,Unchecked,Checked,neutral,,,,	74,Incomplete		
ca7b52b6adaeb99d72d6c74f3e034ab1	"2023-02-26 20:02:43"	blue	No,,	Checked,Checked,Unchecked,Unchecked,Checked,Checked,Unchecked,Checked,neutral	"least importar	

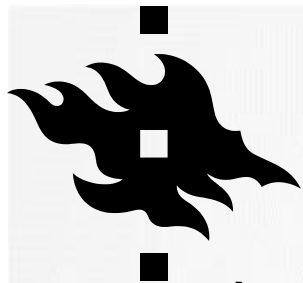


DATA EXPORTS, REPORTS AND STATS

- To make it more readable choose the first column and then go to 'Data' tab and click on 'Text to Columns'

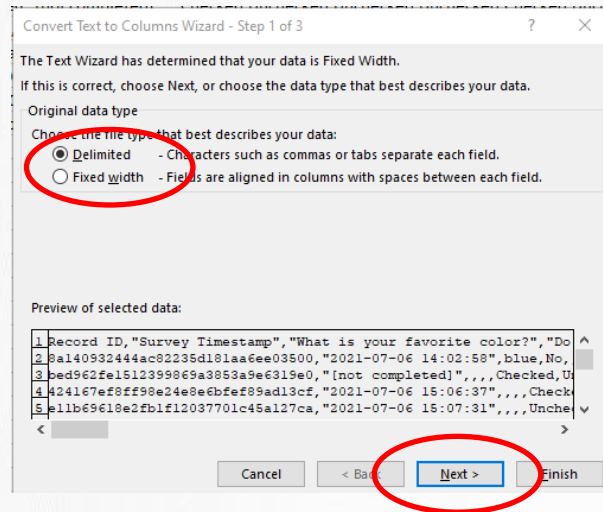
The screenshot shows the Microsoft Excel interface with the 'Data' tab selected. The 'Text to Columns' button is circled in red. The spreadsheet contains the following data:

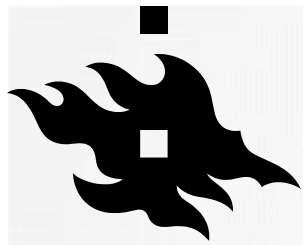
Record ID	Survey Timestamp	What is your favorite color?	Do you have a favorite color?	What is your favorite color?	Which colors do you like? (choice=blue)	Which colors do you like? (choice=green)	Which colors do you like? (choice=yellow)													
8a140932444ac82235d181aa6ee03500	"2021-07-06 14:02:58"	blue	No	Unchecked	Unchecked	Unchecked	Checked	Unchecked	Checked	Unchecked	Unchecked	neutral	"least important"	"most important"	80	Complete				
bed962fe1512399869a3853a9e6319e0	"[not completed]"		Checked	Unchecked	Unchecked	Unchecked	Checked	Unchecked	Unchecked	Unchecked	Unchecked									
424167ef8ff98e24e8e6bfe89ad13cf	"2021-07-06 15:06:37"		Checked	Unchecked	Unchecked	Checked	Unchecked	Unchecked	Checked	Unchecked		"least important"	neutral		Complete					
e11b69618e2fb1f12037701c45a127ca	"2021-07-06 15:07:31"		Unchecked	Unchecked	Unchecked	Unchecked	Unchecked	Unchecked	Unchecked	Unchecked	Unchecked	"least important"	neutral		Complete					
da9b476c02d2e8d68f398c2307696b00	"2021-07-06 15:08:02"	Yes	red	Unchecked	Unchecked	Unchecked	Unchecked	Unchecked	Unchecked	Unchecked	Checked	Unchecked			Complete					
3ae371e8d94f42316b1b2ac812cf4290		yellow	No	Unchecked	Unchecked	Checked	Checked	Unchecked	Unchecked	Unchecked	Checked	neutral		74	Incomplete					
ca7b52b6adaeb99d72d6c74f3e034ab1	"2023-02-26 20:02:43"	blue	No	Checked	Checked	Unchecked	Unchecked	Checked	Checked	Unchecked	Checked	neutral	"least important"		73	Complete				



DATA EXPORTS, REPORTS AND STATS

- A pop up window opens, choose 'Delimited' and then click 'Next'





DATA EXPORTS, REPORTS AND STATS

- In the next window, choose 'Tab' and 'Comma' and then click 'Next':

Convert Text to Columns Wizard - Step 2 of 3

This screen lets you set the delimiters your data contains. You can see how your text is affected in the preview below.

Delimiters

Tab

Semicolon

Comma

Space

Other:

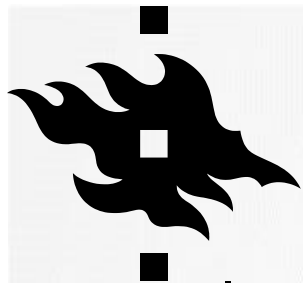
Treat consecutive delimiters as one

Text qualifier:

Data preview

Record ID	Survey Timestamp	What is your
8a140932444ac82235d181aa6ee03500	2021-07-06 14:02:58	blue
bed962fe1512399869a3853a9e6319e0	[not completed]	
424167ef8ff98e24e8e6bfef89ad13cf	2021-07-06 15:06:37	
e11b69618e2fb1f12037701c45a127ca	2021-07-06 15:07:31	

Cancel < Back **Next >** Finish



DATA EXPORTS, REPORTS AND STATS

- In the last window click 'Finish':

Convert Text to Columns Wizard - Step 3 of 3

This screen lets you select each column and set the Data Format.

Column data format

General
 Text
 Date: DMY
 Do not import column (skip)

'General' converts numeric values to numbers, date values to dates, and all remaining values to text.

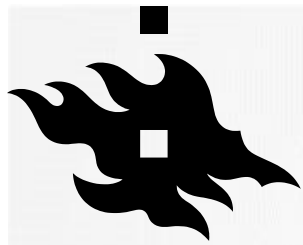
Advanced...

Destination: SAS1

Data preview

General	General	General
Record ID	Survey Timestamp	What is your
8a140932444ac82235d181aa6ee03500	2021-07-06 14:02:58	blue
bed962fe1512399869a3853a9e6319e0	[not completed]	
424167ef8ff98e24e9e6bfe89ad13cf	2021-07-06 15:06:37	
e11b69618e2fb1f12037701c45a127ca	2021-07-06 15:07:31	

Cancel < Back Next > **Finish**

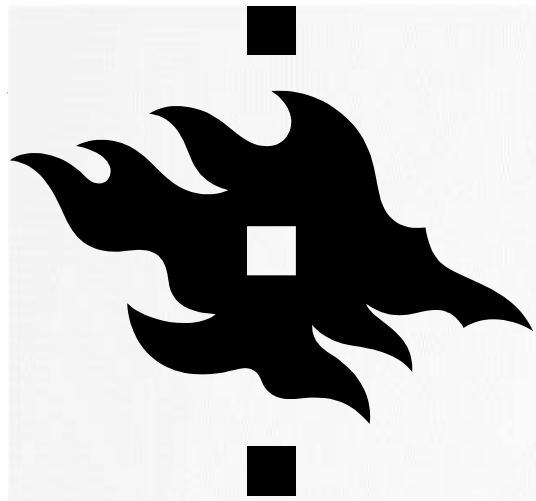


DATA EXPORTS, REPORTS AND STATS

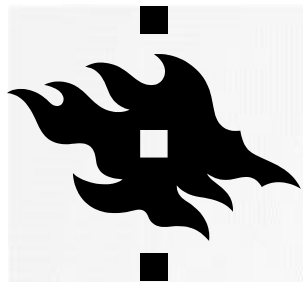
- Now the data is in separate columns:

The screenshot shows the Microsoft Excel ribbon with the 'Data' tab selected. The ribbon includes sections for 'Get & Transform Data', 'Queries & Connections', and 'Data Types'. Below the ribbon, a data table is displayed with columns A through L. The table contains survey data with various fields and status indicators.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Record ID	Survey Timestamp	What is yo	Do you ha	What is yc	Which col	Which col	Which col	Which col	Which col	Which col	Which o
2	8a140932444ac82235d	6.7.2021 14:02	blue	No		Unchecke	Unchecke	Unchecke	Checked	Unchecke	Checked	Uncheck
3	bed962fe1512399869a	[not completed]				Checked	Unchecke	Unchecke	Unchecke	Checked	Unchecke	Uncheck
4	424167ef8ff98e24e8e	6.7.2021 15:06				Checked	Unchecke	Unchecke	Checked	Unchecke	Unchecke	Checkec
5	e11b69618e2fb1f1203	6.7.2021 15:07				Unchecke	Unchecke	Unchecke	Unchecke	Unchecke	Unchecke	Uncheck
6	da9b476c02d2e8d68f3	6.7.2021 15:08		Yes	red	Unchecke	Unchecke	Unchecke	Unchecke	Unchecke	Unchecke	Checkec
7	3ae371e8d94f42316b1b2ac812cf4290		yellow	No		Unchecke	Unchecke	Checked	Checked	Unchecke	Unchecke	Uncheck
8	ca7b52b6adaeb99d72c	26.2.2023 20:02	blue	No		Checked	Checked	Unchecke	Unchecke	Checked	Checked	Uncheck
9												

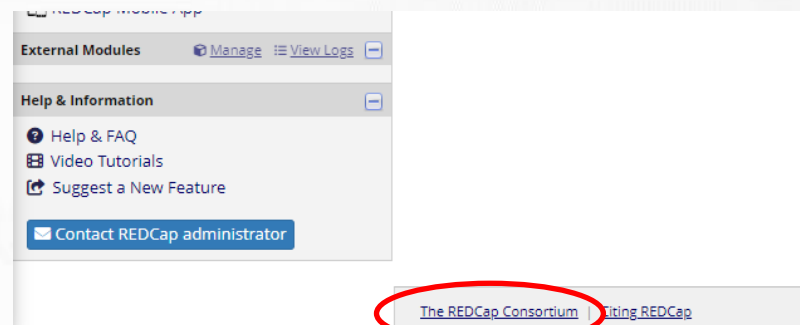


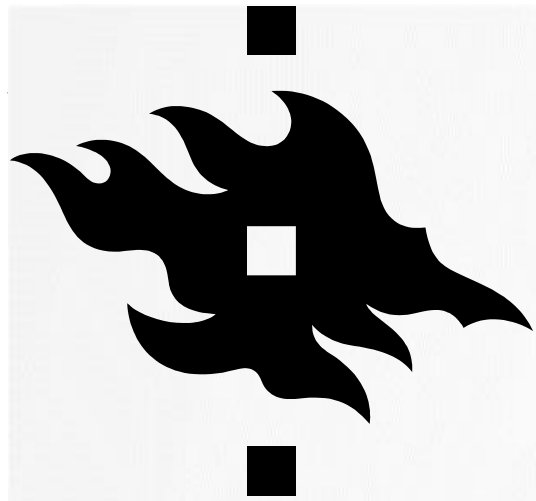
REDCAP CONSORTIUM



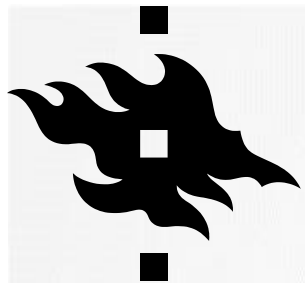
REDCAP CONSORTIUM

- Look which institutions have REDCap
- <https://projectredcap.org/>



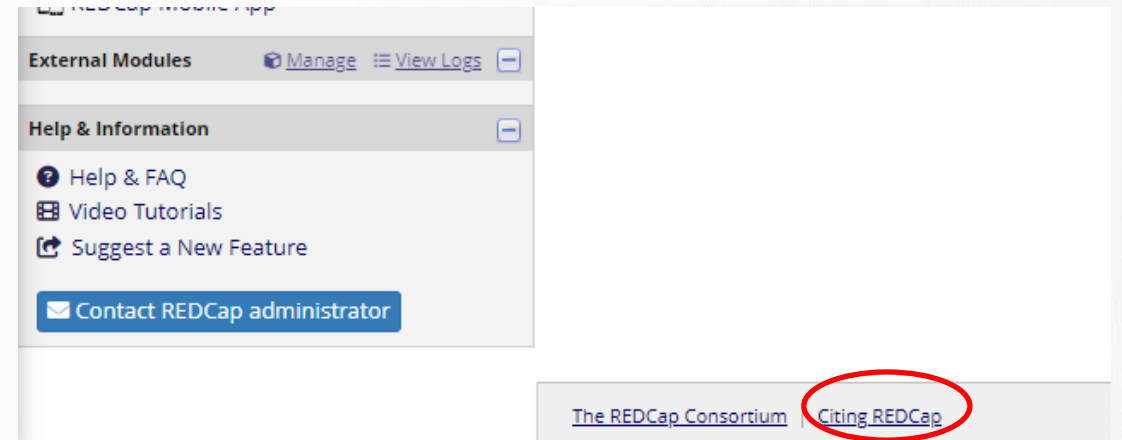


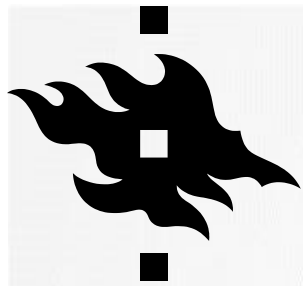
CITING REDCAP



CITING REDCAP

- On the bottom of the page in your project there are instructions on how to cite REDCap
- <https://projectredcap.org/resources/citations/>





CITING REDCAP

- <https://projectredcap.org/resources/citations/>

Please cite the publications below in study manuscripts using REDCap for data collection and management. We recommend the following boilerplate language:

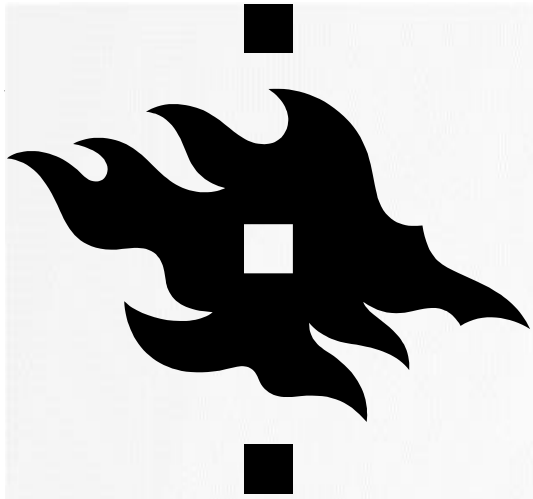
Study data were collected and managed using REDCap electronic data capture tools hosted at [YOUR INSTITUTION].^{1,2} REDCap (Research Electronic Data Capture) is a secure, web-based software platform designed to support data capture for research studies, providing 1) an intuitive interface for validated data capture; 2) audit trails for tracking data manipulation and export procedures; 3) automated export procedures for seamless data downloads to common statistical packages; and 4) procedures for data integration and interoperability with external sources.

¹PA Harris, R Taylor, R Thielke, J Payne, N Gonzalez, JG. Conde, Research electronic data capture (REDCap) – **A metadata-driven methodology and workflow process for providing translational research informatics support**, *J Biomed Inform.* 2009 Apr;42(2):377-81.

²PA Harris, R Taylor, BL Minor, V Elliott, M Fernandez, L O'Neal, L McLeod, G Delacqua, F Delacqua, J Kirby, SN Duda, REDCap Consortium, **The REDCap consortium: Building an international community of software partners**, *J Biomed Inform.* 2019 May 9 [doi: 10.1016/j.jbi.2019.103208]

Link to articles:

- <http://www.sciencedirect.com/science/article/pii/S1532046408001226>
- <https://www.sciencedirect.com/science/article/pii/S1532046419301261>



THANK YOU!

Redcap-support@helsinki.fi