

# Scientific Computing, Research Data Services



<https://redcap.mountsinai.org>

[redcap-support@mssm.edu](mailto:redcap-support@mssm.edu)

# Scientific Computing, Research Data Services

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## What This Presentation Will Cover:

- ▶ Getting a REDCap Account and Logging In
- ▶ Creating New Projects
- ▶ Project Setup part 1
  - Enabling Surveys
- ▶ Surveys vs Data Entry Forms
- ▶ Project Setup part 2
  - Online Designer/Data Dictionary
- ▶ Data Exports
- ▶ Data Import Tool
- ▶ Project Setup part 3
  - User Rights and Permissions
  - Moving a Project from Development to Production

## Getting a REDCap Account/Logging In:

- ▶ Mount Sinai faculty, students and staff can log into REDCap here: <https://redcap.mountsinai.org/> with their regular Mount Sinai username and password.
- ▶ For users without Mount Sinai credentials, send their names and email addresses to [redcap-support@mssm.edu](mailto:redcap-support@mssm.edu) and they will be added as external collaborators with the credentialed requester as their sponsor.
- ▶ Either way, new users will be presented with a registration form. After the form is submitted, they will receive an email to verify their email address. Once verified, they can be added to your projects.

# Getting a REDCap Account/Logging In (cont.):

**From:** redcapadmin@mssm.edu [mailto:redcapadmin@email.edu]

**Sent:** Thursday, August 09, 2018 10:15 AM

**To:** User, Test

**Subject:** REDCap access granted

[This message was automatically generated by REDCap]

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

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

[Set your new REDCap password](#)



## Set Your Password

Your password has not been set yet or has been reset. You will need to set your password here to whatever value you wish. Please enter your desired password below and click the 'Submit' button. Once your password has been set, you may use it with your username whenever you log in to REDCap. Please make sure that you write down or remember your new password for future use. **The new password entered must be AT LEAST 9 CHARACTERS IN LENGTH and must consist of AT LEAST one lower-case letter, one upper-case letter, and one number.**

Username:	test.user
Password:	<input type="password"/>
Re-type password:	<input type="password"/>

Submit

## Creating New Projects:

- ▶ When you first log into REDCap you will be on the Home tab. There is helpful information and links to training materials.
- ▶ You can access your existing projects that you have created or have been added to as a user by clicking the My Projects button.
- ▶ You can create a project by clicking the New Project button.



## Creating New Projects (cont.):

- ▶ When you create a new project, you will give it a name and add some basic information for the REDCap Consortium.

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?

**Name of P.I. (if applicable):**   
First name MI Last name

**Email of P.I. (if applicable):**

**Name of P.I. as cited in publications (if applicable):**  (e.g., Harris PA)

**IRB number (if applicable):**

**Please specify:**

- Basic or bench research
- Clinical research study or trial
- Translational research 1 (applying discoveries to the development of trials and studies in humans)
- Translational research 2 (enhancing adoption of research findings and best practices into the community)
- Behavioral or psychosocial research study
- Epidemiology
- Repository (developing a data or specimen repository for future use by investigators)
- Other

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

## Creating New Projects (cont.):

- ▶ You can also use templates to prepopulate your project with common Surveys and Data Entry Forms.

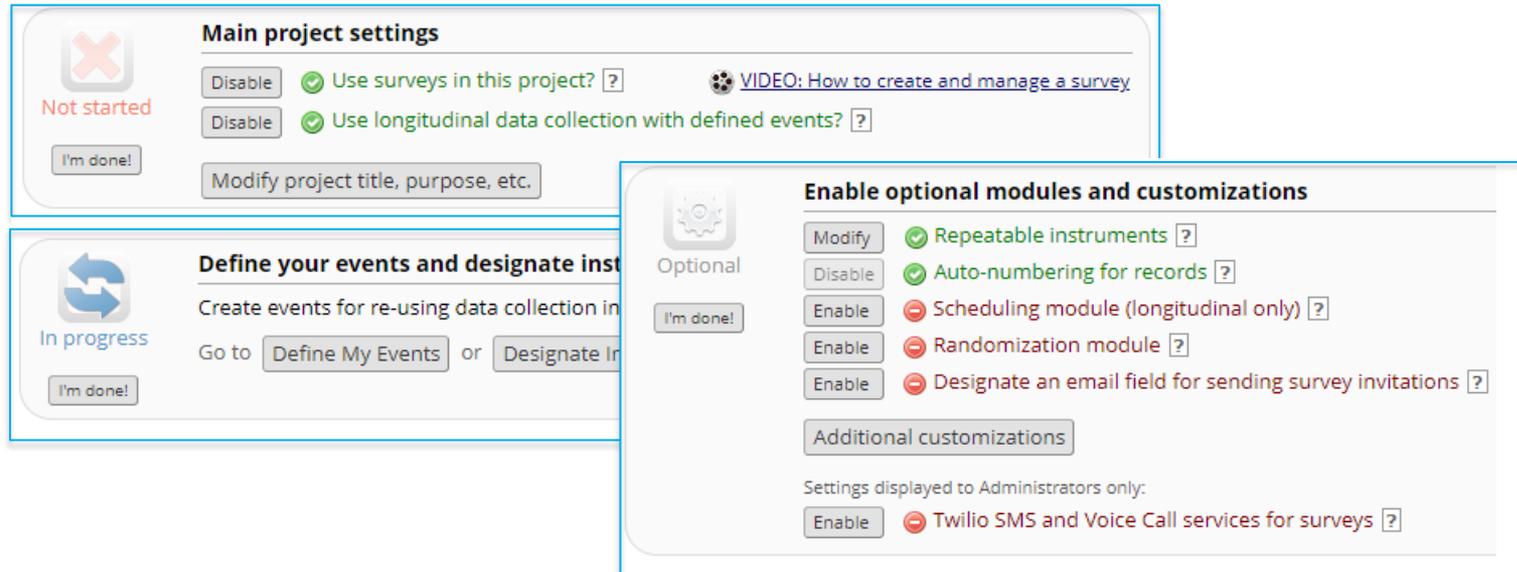
★ **Choose a project template** (comes pre-filled with fields, forms/surveys, and other settings) [+ Add templates \(Administrators only\)](#)

select template	Template title (sorted by title)	Template description
<input type="radio"/>	Basic Demography	Contains a single data collection instrument to capture basic demographic information.
<input type="radio"/>	Classic Database	Contains six data entry forms, including forms for demography and baseline data, three monthly data forms, and concludes with a completion data form.
<input type="radio"/>	Longitudinal Database (1 arm)	Contains nine data entry forms (beginning with a demography form) for collecting data longitudinally over eight different events.
<input type="radio"/>	Longitudinal Database (2 arms)	Contains nine data entry forms (beginning with a demography form) for collecting data on two different arms (Drug A and Drug B) with each arm containing eight different events.

# Project Setup part 1

## Using Surveys

- ▶ On the **Project Setup** tab you can enable the use of surveys in your project or enable many other REDCap data collection tools.



The screenshot displays the REDCap Project Setup interface. It is divided into three main sections:

- Main project settings:** This section is marked as "Not started" with a red 'X' icon. It contains two toggle switches, both of which are currently turned on (green checkmarks). The first toggle is "Use surveys in this project?" and the second is "Use longitudinal data collection with defined events?". There are "Disable" buttons next to each toggle. A link for a video "VIDEO: How to create and manage a survey" is also present. Below the toggles are buttons for "I'm done!" and "Modify project title, purpose, etc."
- Define your events and designate instruments:** This section is marked as "In progress" with a blue circular arrow icon. It includes a description: "Create events for re-using data collection in..." and a "Go to" section with buttons for "Define My Events" and "Designate Instruments". There is an "I'm done!" button at the bottom.
- Enable optional modules and customizations:** This section is marked as "Optional" with a gear icon. It lists several modules that can be enabled or disabled:
  - Repeatability:** "Repeatable instruments" is enabled (green checkmark).
  - Auto-numbering:** "Auto-numbering for records" is enabled (green checkmark).
  - Scheduling:** "Scheduling module (longitudinal only)" is disabled (red minus sign).
  - Randomization:** "Randomization module" is disabled (red minus sign).
  - Invitations:** "Designate an email field for sending survey invitations" is disabled (red minus sign).Below these are "Additional customizations" and a section for "Settings displayed to Administrators only", which includes "Twilio SMS and Voice Call services for surveys" (disabled, red minus sign). Each item has a corresponding "Enable" or "Disable" button and a help icon.

# Surveys vs Data Entry Forms:

- ▶ **Surveys** are meant to be completed by participants. Participants may be emailed a link, find a link posted online or be handed a tablet by the project team.

### Survey

Please complete the survey below.

Thank you!

Do you want to participate in our survey?  
 Yes  
 No

First Name:

Last Name:

Date of Birth?:  MM-DD-YY

Email Address:   
\* must provide value

Please watch this video.  
[Watch video](#)

Based on the video, please rate the statements below:

	Good	Fair	Not Good	
Video Quality	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	reset
Video Length	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	reset
Video Volume	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	reset

Only Data Collection

# Surveys vs Data Entry Forms (cont.):

- ▶ **Data Entry Forms** are meant to be completed by project team members who have REDCap logins.

REDCap  
user controls

The image shows a screenshot of the REDCap web interface. On the left is a sidebar titled 'Data Collection' with various management options like 'Manage Survey Participants', 'Record Status Dashboard', and 'Add / Edit Records'. Below this is a list of 'Applications' including 'Calendar', 'Data Exports, Reports, and Stats', and 'REDCap Mobile App'. The main area shows a form for 'Editing existing Record ID 1'. The form includes fields for 'Record ID' (set to 1), a participation question 'Do you want to participate in our survey?' with 'Yes' selected, and text input fields for 'First Name' (Test), 'Last Name' (Testman1), and 'Email Address' (scott.robertson@mssm.edu). There is also a video player section with a 'Watch video' button and a rating section for 'Video Quality' and 'Video Length' with radio buttons for 'Good', 'Fair', and 'Not Good'.

Data  
Collection

# Project Setup part 2

## Online Designer/Data Dictionary:

- ▶ You will spend most of your development time building data collection instruments using the **Online Designer** or, for advanced users, the **Data Dictionary**.



Not started

I'm done!

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

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

Go to  Online Designer or  Data Dictionary Explore the  REDCap Shared Library

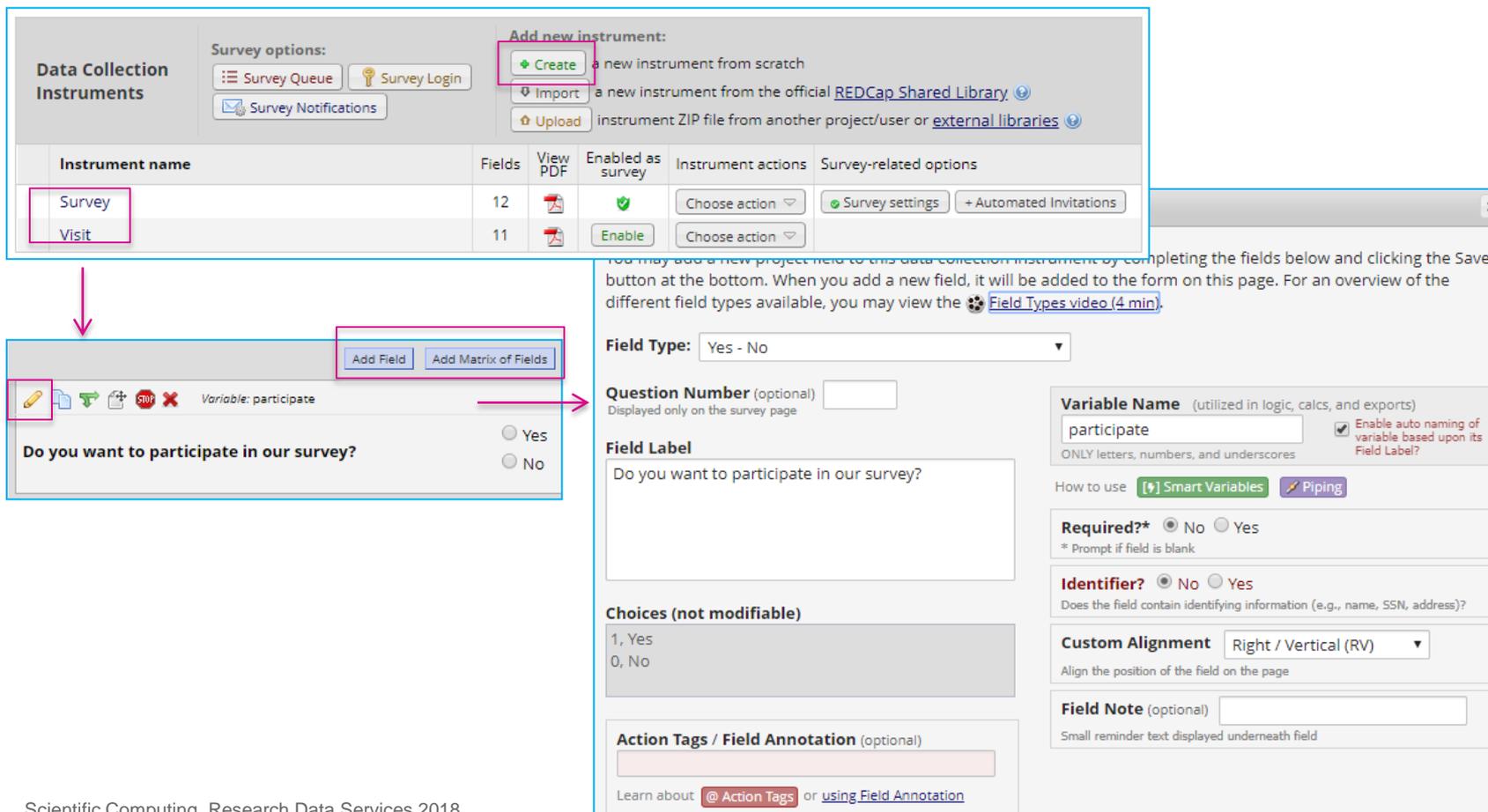
Have you checked the [Check For Identifiers](#) page to ensure all identifier fields have been tagged?

Learn how to use  Smart Variables  Piping  Action Tags

# Project Setup part 2

## Online Designer/Data Dictionary (cont.):

- ▶ The **Online Designer** will add individual data collection fields to individual data collection instruments one by one.



The screenshot illustrates the workflow for adding a new field to a data collection instrument in REDCap's Online Designer. It is divided into three main sections:

- Instrument List:** Shows a table of existing instruments. The 'Survey' instrument is highlighted, indicating it is the one being edited.
- Field Editor:** Shows the 'Add Field' dialog box. The field name is 'participate' and the question text is 'Do you want to participate in our survey?'. The field type is set to 'Yes - No'.
- Field Configuration Panel:** Provides detailed settings for the field, including:
  - Field Type:** Yes - No
  - Question Number:** (optional)
  - Field Label:** Do you want to participate in our survey?
  - Variable Name:** participate (with an option to enable auto-naming)
  - Required?\***: No (selected)
  - Identifier?:** No (selected)
  - Custom Alignment:** Right / Vertical (RV)
  - Field Note:** (optional)
  - Action Tags / Field Annotation:** (optional)

# Project Setup part 2

## Online Designer/Data Dictionary (cont.):

- ▶ The **Data Dictionary** will add multiple data collection fields to multiple data collection instruments all at once. Data Dictionaries can be created offline, saved and uploaded later.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Variable / Field Name	Form Name	Section Header	Field Type	Field Label	Choices	Field Note	Text Valid	Identifier	Branching	Required	Matrix Gr	Field Annotation
2	record_id	survey		text	Record ID								@HIDDEN-SURVEY
3	participate	survey		yesno	Do you want								
4	thank_you_and_have	survey		descriptive	Thank you								[participate] = '0'
5	first_name	survey		text	First Name				y				[participate] = '1'
6	last_name	survey		text	Last Name				y				[participate] = '1'
7	dob	survey		text	Date of Birth			date_mdy	y				[participate] = '1'
8	email	survey		text	Email Address			email	y				@HIDEBUTTON
9	video	survey		descriptive	Please watch								[participate] = '1'
10	video_quality	survey	Based on the vi	radio	Video Quality								[participate] = '1' video
11	video_length	survey		radio	Video Length								[participate] = '1' video
12	video_volume	survey		radio	Video Volume								[participate] = '1' video
13	video_score	survey		calc	Video Score								@HIDDEN-SURVEY
14	pipe	visit		descriptive	<font								
15	date_of_visit	visit		text	Date of Visit								
16	height	visit		text	Height								
17	weight	visit		text	Weight								
18	bmi	visit		calc	BMI								
19	group	visit		dropdown	Group								
20	category	visit		radio	Category								
21	condition	visit		checkbox	Condition								
22	signature	visit		file	Signature								
23	upload_file	visit		file	Upload File								
24	are_they_cool	visit		slider	Cool?								

### Steps for making project changes:

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

### Upload your Data Dictionary file (CSV file format only)

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

No file chosen

- ▶ **Data Exports** will output all of your collected data into a format of your choice.

The screenshot displays the 'Data Exports, Reports, and Stats' application interface. The 'Applications' sidebar on the left has 'Data Exports, Reports, and Stats' highlighted. The 'My Reports & Exports' table shows two reports: 'A All data (all records and fields)' and 'B Selected instruments (all records)'. The 'Export Data' button for report A is highlighted. Below the table, the 'Choose export format' panel is visible, with 'CSV / Microsoft Excel (raw data)' selected. The 'De-identification options' panel is also visible, showing various options to limit sensitive information.

**Applications**

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

**My Reports & Exports**

	Report name	View/Export Options
A	All data (all records and fields)	View Report Export Data Stats & Charts
B	Selected instruments (all records)	Make custom selections

**Choose export format**

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

**De-identification options (optional)**

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

**Known Identifiers:**

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

**Free-form text:**

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

**Date and datetime fields:**

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

[Deselect all options](#)

**Additional export options**

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

# Data Import Tool

- ▶ The **Data Import Tool** will upload one or multiple data collection fields into one or multiple data collection instruments.

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

**Format for date and datetime values:**

**Allow blank values to overwrite existing saved values?**

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

**Upload your CSV file:**

No file chosen

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	
1	record_id	survey_timestamp	participat	first_name	last_name	dob	email	video_qu	video_len	video_vol	video_sco	survey_co	date_of_vi	height	weight	bmi	group	ca
2	1		1	Test	Testman1	8/1/2018	scott.robe	1	2	3	6	2	8/10/2018	72	150	20.34144	1	
3	2	8/10/2018 11:16	1	Scott	Testman2	8/1/2018	scott.robe	1	2	3	6	2	8/14/2018	58	200	41.79548	1	
4	3	8/10/2018 11:45	0									2	8/14/2018					
5	4		1	Test	Testman1	8/1/2018	scott.robe	1	2	3	6	2	8/10/2018	72	150	20.34144	1	
6	5	8/10/2018 11:16	1	Scott	Testman2	8/1/2018	scott.robe	1	2	3	6	2	8/14/2018	58	200	41.79548	1	
7	6	8/10/2018 11:45	0									2	8/14/2018					
8	7		1	Test	Testman1	8/1/2018	scott.robe	1	2	3	6	2	8/10/2018	72	150	20.34144	1	
9	8	8/10/2018 11:16	1	Scott	Testman2	8/1/2018	scott.robe	1	2	3	6	2	8/14/2018	58	200	41.79548	1	
10	9	8/10/2018 11:45	0									2	8/14/2018					
11	10		1	Test	Testman1	8/1/2018	scott.robe	1	2	3	6	2	8/10/2018	72	150	20.34144	1	
12																		

# Project Setup part 3

## User Rights and Permissions

- ▶ **User Right and Permissions** is where the access to data and tools can be granted or denied at the project level.

### Basic Rights

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

Highest level privileges:

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

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

Data Exports  No Access  
 De-Identified\*  
 Remove all tagged Identifier fields  
 Full Data Set

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

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

Stats & Charts

Other privileges:

- Manage Survey Participants
- Calendar
- Data Import Tool
- Data Comparison Tool

### 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
Survey (survey)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>
Visit	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>

### External Modules:

Privileges may be defined or modify the configuration been enabled on this modules. NOTE: Only configuration permissions.

Email Alerts\*\*  
 \*\*Module does not have

### Applications

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

## Project Setup part 3

# Moving a Project from Development to Production

- ▶ Moving from Development to Production means a project is now collecting real and not test data. Edits and updates to the project that may result in data loss are automatically sent to REDCap Support for approval.



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](#)

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