

REDCap Beginner's Guide

- ## Overview
- Getting started: <http://info-survey.hs.uci.edu/redcap/>
 - Project creation
 - Project development
 - Using the Project Setup tab
 - Building data collection instruments
 - Testing instruments and applications
 - Production mode

Getting started

Login to <http://info-survey.hs.uci.edu/redcap/>
Explore the training and help resources.

The screenshot shows the REDCap website interface. At the top, there is a navigation bar with links: Home, My Projects, Create New Project, Training Resources, Help & FAQ, Send It, and Control Center. Below this, the 'Getting started' section is visible, containing a welcome message and a list of features. Two red arrows point to the 'Training Resources' and 'Help & FAQ' links in the navigation bar.

Project creation

On the 'create' tab, choose the project title and purpose.

Home My Projects **Create new Project** Training Resources Help & FAQ Send-It Control Center

Create a new REDCap Project

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

Project title:
Title to be displayed on project webpage

Purpose of this project:
(How will it be used?)
-- Select One --

Start project from scratch or begin with a template?
 Create an empty project (blank slate)
 Use a template (choose one below)

Project creation

Next, choose the design, and create the project.

Start project from scratch or begin with a template?
 Create an empty project (blank slate)
 Use a template (choose one below)

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

Template title (sorted by title)	Template description
Basic Demography	Contains a single data collection instrument to capture basic demographic information.
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.
Human Cancer Tissue Biobank	Contains five data entry forms for collecting and tracking information for cancer tissue.
Longitudinal Database (1 arm)	Contains nine data entry forms (beginning with a demography form) for collecting data longitudinally over eight different events.
Longitudinal Database (2 arms)	Contains nine data entry forms (beginning with a demography form) for collecting data on two different arms (Drug A and Drug B) with each arm containing eight different events.

Create Project **Cancel**

Project development

Within the new project, you'll see the menu, project title, and project setup tab.

REDCap DEMONSTRATION PROJECT

Project Home **Project Setup** Other Functionality Project Revision History

Project status: Development Completed Completed steps 0 of 6

Main project settings

Use longitudinal data collection with repeating forms?
 Use surveys in this project?
[Study project title, purpose, etc.](#)

Design your data collection instruments

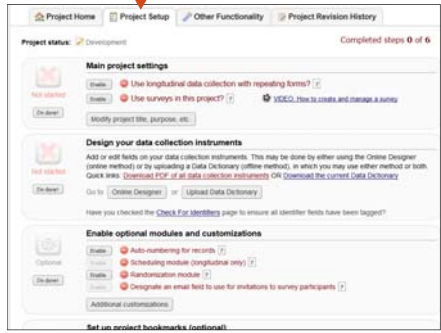
Go to: [Online Designer](#) | [Download Data Dictionary](#)

Enable optional modules and customizations

Administrating by module
 Scheduling module (implies other)
 Randomization module
 Generate an email feed to use for evaluations in survey parts (beta)

Project development

Follow the Setup tab checklist to build your project.



Project status: Development Completed steps 0 of 6

Main project settings

- Not started: Use longitudinal data collection with repeating forms?
- Not started: Use surveys in this project?
- YDGO: How to create and manage a survey
- Modify project title, purpose, etc.

Design your data collection instruments

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

Go to: [Online Designer](#) or [Upload Data Dictionary](#)

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

Enable optional modules and customizations

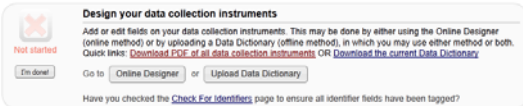
- Optional: Auto-numbering for records?
- Optional: Scheduling module (longitudinal only)?
- Optional: Randomization module?
- Designate an email field to use for invitations to survey participants?
- Additional customizations

Set up project bookmarks (optional)

Project development

Project development begins with designing data collection instruments. Instruments are the webpages used to enter your data into REDCap.

There are two methods to design instruments: the Online Designer and the Data Dictionary



Design your data collection instruments

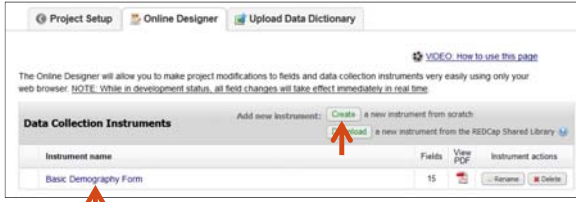
Not started: Add or edit fields on your data collection instruments. This may be done by either using the Online Designer (online method) or by uploading a Data Dictionary (offline method), in which you may use either method or both. Quick links: [Download PDF of all data collection instruments](#) OR [Download the current Data Dictionary](#)

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Project development

The Online Designer is the fast, easy way to build instruments entirely online. Customize existing instruments, and create new ones.



Project Setup Online Designer Upload Data Dictionary

YDGO: [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 Collection Instruments

Add new instrument: [Create](#) a new instrument from scratch
[Load](#) a new instrument from the REDCap Shared Library

Instrument name	Fields	View PDF	Instrument actions
Basic Demography Form	15		Rename Delete

Project development

The Online Designer makes it easy to customize existing questions and add new questions.

Project development

Many field types are available. Always enter the Field Label and Variable Name.

Project development

The Data Dictionary method uses a spreadsheet to build instruments. Customize the file in Excel, and then upload it to make changes.

Project development

The dictionary captures the same information as the Online Designer. Each row corresponds to a field.

#	A	B	C	D	E	
1	Variable / Field Name	Form Name	Section Header	Field Type	Field Label	Choices, Calculations, C
2	record_id	basic_demography_form		text	Study ID	
3	first_name	basic_demography_form	Contact Information	text	First Name	
4	last_name	basic_demography_form		text	Last Name	
5	address	basic_demography_form		notes	Street, City, State, ZIP	
6	telephone	basic_demography_form		text	Phone number	
7	email	basic_demography_form		text	E-mail	
8	dob	basic_demography_form		text	Date of birth	
9	age	basic_demography_form		calc	Age (years)	rounddown(datediff([d
10	ethnicity	basic_demography_form		radio	Ethnicity	0, Hispanic or Latino 1
11	race	basic_demography_form		dropdown	Race	0, American Indian/Ala
12	sex	basic_demography_form		radio	Gender	0, Female 1, Male
13	height	basic_demography_form		text	Height (cm)	
14	weight	basic_demography_form		text	Weight (kilograms)	
15	bmi	basic_demography_form		calc	BMI	round([weight]*1000
16	comments	basic_demography_form	General Comments	notes	Comments	

Project development

Use the Data Collection section to test your instruments by entering practice data. Entering practice data will often lead to more instrument changes.

The screenshot shows the REDCap interface for a 'DEMONSTRATION PROJECT'. The 'Basic Demography Form' is selected. In the left-hand 'Data Collection' menu, the 'Add/Edit Records' option is highlighted with a red arrow. The main content area shows summary statistics: 'Total records: 0', 'Incomplete Records: 0', and 'Complete Records: 0'. There are 'add record' buttons for each category. Below this, there is a field to 'Enter a new or existing Study ID'.

Project development

After doing some data entry, test some of the Applications. The way you need the applications to function can lead to changes on the instruments.

The screenshot shows the REDCap interface for the 'Basic Demography Form'. In the left-hand 'Applications' menu, the 'Calendar' option is highlighted with a red arrow. The main content area shows a 'Data Search' section with a 'Choose a field to search' dropdown and a search input field. Below that is a 'Search users' section with a search input field.

Project development

Use the Setup tab checklist to track your progress. Not all steps on this tab are required.



Production mode

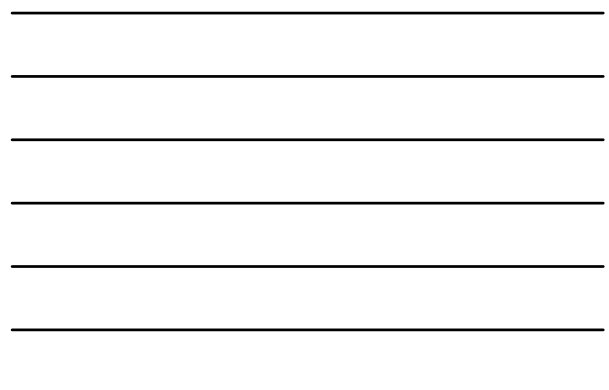
When you are ready to begin entering real data, use the Setup tab to move the project to production mode.

You can delete all practice data, so that your project will be ready for real data entry.



Production mode

Production mode looks much like development mode, but production has extra precautions to protect saved data. Moving to production isn't required, but it is **STRONGLY** recommended.



Production mode

The Online Designer and Data Dictionary can still be used to modify instruments, but some changes are no longer immediate.

Modify your data collection instruments in Draft Mode

Once in production, you may still modify or add fields to the project, if you desire. This may be done by either using the Online Designer (online method) or by uploading a Data Dictionary (offline method), in which you may use either method or both. Quick links: [Download PCE of all data collection instruments](#) OR [Download the current Data Dictionary](#)

Go to or

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

Enter Draft mode to make and submit changes to the instruments.

NOTE:
The project is currently in PRODUCTION status, and thus changes cannot be made in real time to the project as when in Development status. However, changes to the project may be drafted in DRAFT MODE, after which such changes will be reviewed and approved by a REDCap administrator. Once those changes are approved, you will then receive an email confirmation informing you that those changes have taken effect on your production project.

Share your instruments with others via the REDCap Shared Library

Would you like to enter DRAFT MODE to begin drafting changes to the project?

Summary

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For Questions about Access:
[**CBMISupport@uci.edu**](mailto:CBMISupport@uci.edu)
For Training/Assistance:
[**LBJ@uci.edu**](mailto:LBJ@uci.edu)
