

Introduction to REDCap

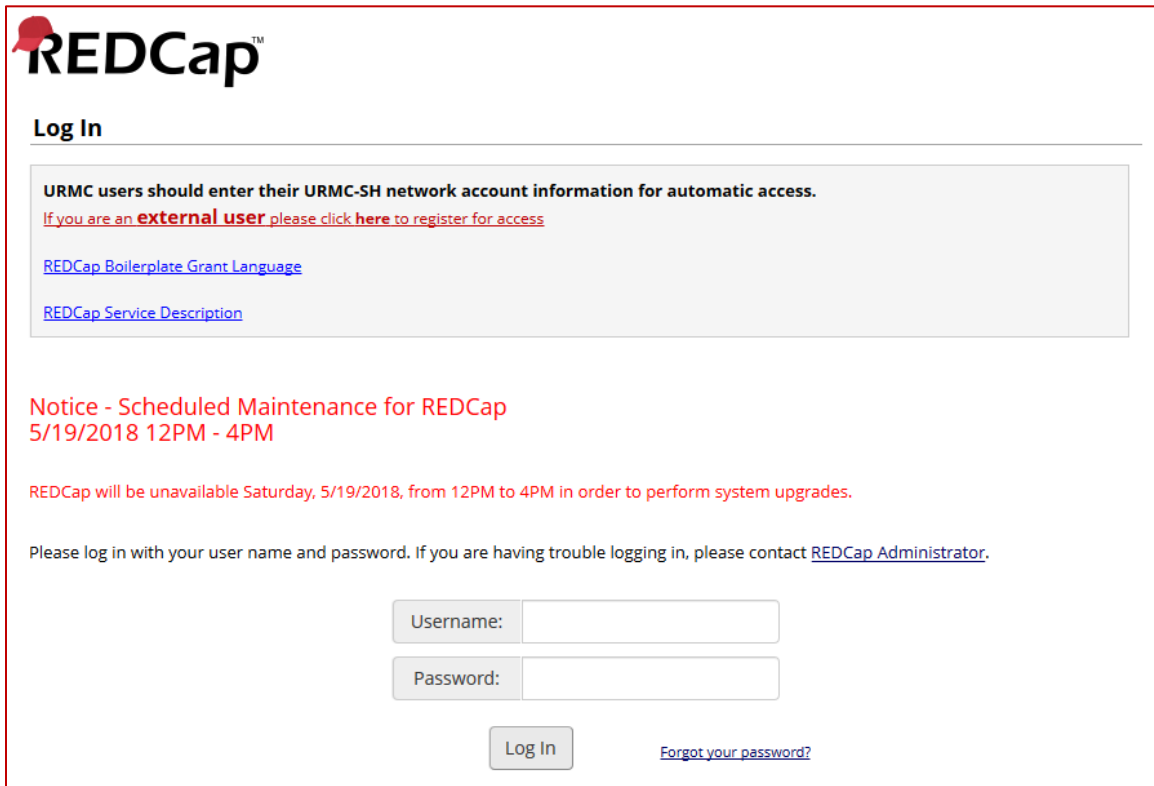
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Introduction

According to the REDCap website, (<https://redcap.urmc.rochester.edu/redcap/>) REDCap is a “mature, secure web application for building and managing online surveys and databases.”

It is useful for keeping track of subject study involvement and generating reports for Continuing Reviews. It is recommended and curated by URMC. Importantly, we have approval from the IRB to use it on our current protocols. It is recommended that future protocols also obtain approval to use it, for ease of keeping and compiling data.

This guide will discuss how to use the REDCap system.



REDCap™

Log In

URMC users should enter their URMC-SH network account information for automatic access.
If you are an **external user** please [click here](#) to register for access

[REDCap Boilerplate Grant Language](#)

[REDCap Service Description](#)

Notice - Scheduled Maintenance for REDCap
5/19/2018 12PM - 4PM

REDCap will be unavailable Saturday, 5/19/2018, from 12PM to 4PM in order to perform system upgrades.

Please log in with your user name and password. If you are having trouble logging in, please contact [REDCap Administrator](#).

Username:

Password:

[Forgot your password?](#)

Image 1: REDCap Login Screen

My Projects		Filter projects by title			
Project Title	Records	Fields	Instrument	Type	Status
+ Tanenhaus Lab (4)					
- APLab (1)					
APLab Subject Demographics	9	18	1 form 1 survey		

Image 2: My Projects screen

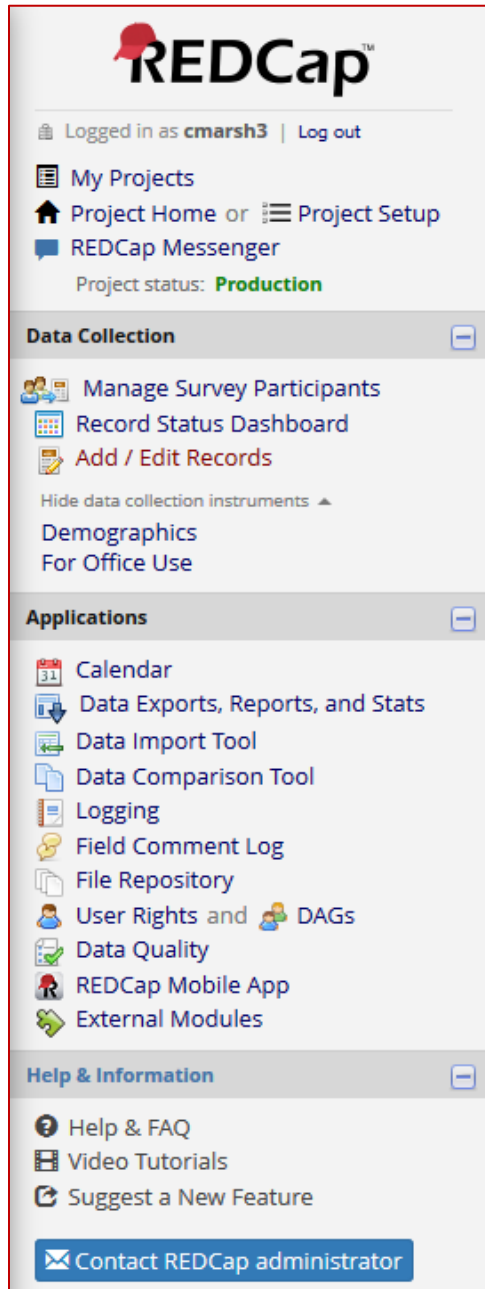


Image 3: Projects Sidebar

1. Accessing REDCap

Email a REDCap administrator (REDCapAdmin@URMC.Rochester.edu) to get an account.

Once you have an account, your project head can add you to the project.

2. Adding or Editing Records

In the sidebar, click “Add / Edit Records”.

To edit an existing record, select it from the dropdown menu.

To add a new record, click “Add New Record”.

2.1 Demographics Tool

Demographics

Adding new Record ID 10

Record ID 10

Contact & Demographics

Date
* must provide value
[Date Picker] Today M-D-Y

Full Name
* must provide value
[Text Field]

Phone Number
[Text Field] include area code

Email Address
* must provide value
[Text Field]

Birth Year
* must provide value
[Text Field] all four digits

Gender
* must provide value
 Male
 Female
 Other / Prefer not to say

Handedness
* must provide value
 Left-handed
 Right-handed

Ethnicity
* must provide value
 Hispanic or Latino
 Not Hispanic or Latino
 Unknown / Prefer not to say reset

Race
* must provide value
 More than One Race
 American Indian / Alaska Native
 Asian
 Native Hawaiian or Other Pacific Islander
 White
 Black or African American
 Other not Listed
 Unknown / Prefer not to say

Form Status

Complete?
[Dropdown] Incomplete

Save & Exit Form
Save & Go To Next Form
-- Cancel --

Image 4: Demographics Tool

* = must provide value

Date*: Date on the paper form, or date when they first come in

Full Name*: As written

Phone Number: Optional, as written

Email*: As written

Birth Year*: As written

Gender*: Select at least one

Handedness*: Select at least one

Ethnicity*: Select only one

Race*: Select at least one

Mark as “Complete” when complete. Click “Save & Go to Next Form”.

2.2 For Office Use

For Office Use

Editing existing Record ID 10

Record ID 10

Grant * must provide value
 Martina
 Michele

Tracking * must provide value
 Withdrawn due to bad tracking
 Continuing subject
 Subject chooses to withdraw

Visual Acuity (Right and Left) * must provide value

Recruitment Method
 ex. flyer, craigslist, word of mouth

Notes

Form Status

Complete? Incomplete

Save & Exit Form Save & Stay -- Cancel --

* = must provide value

Grant*: Select at least one

Tracking: Select at least one

Selecting “Withdrawn due to bad tracking” or “Subject chooses to withdraw” will reveal the **Withdraw date** field

Withdraw date*: Enter date subject was withdrawn

Visual Acuity*: Provide values for both left and right eyes

Recruitment method: fill in if available

Notes: Place for any additional notes (such as: “small pupils”; “fidgety”; “very tall”)

Image 5: For Office Use tool

Mark “Unverified” when complete; this is because there is always the chance that someone will withdraw. If you are missing information, leave it as “Incomplete”. Click “Save & Exit Form”.

NOTE: Some fields are required!

Your data was successfully saved, but you did not provide a value for some fields that require a value. Please enter a value for the fields on this page that are listed below.

Provide a value for...

- Tracking

Okay Ignore and leave record

Image 6: Missing information pop-up

The form will notify you if you leave something blank. Selecting “Okay” will take you back to the record; clicking “Ignore and Leave Record” will take you to the menu screen.

If there is a paper form, note the Record ID on the form and the date that it was entered into REDCap.

3. Exporting Data

In the sidebar, click “Data Exports, Reports, and Stats”.

It will take you to this screen:

APLab Subject Demographics

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
A	All data (all records and fields)	View Report Export Data Stats & Charts	
B	Selected instruments (all records)	Make custom selections	
+ Create New Report			

Image 7: Data Reports, Exports, and Stats screen

Click “+ Create New Report”.

Name of Report:

STEP 1

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

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

STEP 2

Fields to include in report [Quick Add](#) Add all fields from selected instrument:

Field	Field	Instrument
Field 1	record_id "Record ID"	Demographics
Field 2	Type variable name or field label	

Additional fields to include in report (optional)

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

STEP 3

Filters (optional) [How to use filters and AND/OR logic](#)

Filter	Operator / Value
1	Type variable name or field label =

Switch format: [Use advanced logic](#)

Live Filters (optional) Live Filters can be selected on the report page for dynamically filtering data in real time. Only multiple choice fields can be used as Live Filters (as well as Events, if longitudinal, and Data Access Groups, if any exist).

Live Filter 1: -- select a field --
Live Filter 2: -- select a field --
Live Filter 3: -- select a field --

STEP 4

Order the Results (optional)

Order	Field	Order
First by	record_id "Record ID"	Ascending order
Then by	Type variable name or field label	Ascending order
Then by	Type variable name or field label	Ascending order

Image 8: New Report form

Name of Report: “[PI] Demographics [Date]”

Step 1: Leave as-is.

Step 2: Fields to Include

Field	Field Name	Instrument
Field 1	form_date "Date"	Demographics
Field 2	record_id "Record ID"	Demographics
Field 3	gender "Gender"	Demographics
Field 4	ethnicity "Ethnicity"	Demographics
Field 5	race "Race"	Demographics
Field 6	-- select a field --	

Date
Record ID
Gender
Ethnicity
Race

Image 9: Fields to include

Step 3: Filters

Filter	Operator / Value
1 form_date "Date"	<= 05-16-2018
AND	
2 grant "Grant"	is checked Michele
AND	
3 -- select a field --	

Filter 1:
Date <= Date of
Report, or
ending date of
period
Filter 2:
Grant, [PI]

Image 10: Filters

Once you have clicked “Save Report” at the bottom of the screen, this pop-up will appear:

✓ **Your report has been saved!**

The report named "Michele Demographics (5/16/2018)" has been successfully saved.

[View report](#) [Return to My Reports & Exports](#) [Continue editing report](#)

Image 11: Report saved pop-up

4. Viewing Data

Clicking “View Report” will take you to this screen:

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

[Create New Report](#)
[My Reports & Exports](#)
[Other Export Options](#)
[View Report: Michele Demographics \(5/16/2018\)](#)

Number of results returned: **10**
 Total number of records queried: 10

[Stats & Charts](#)
[Export Report](#)
[Print Page](#)
[Edit Report](#)

Michele Demographics (5/16/2018) Search

Date form_date	Record ID record_id	Gender			Ethnicity ethnicity	Race							
		Male gender__0	Female gender__1	Other / Prefer not to say gender__2		More than One Race race__0	American Indian / Alaska Native race__1	Asian race__2	Native Hawaiian or Other Pacific Islander race__3	White race__4	Black or African American race__5	Other not Listed race__6	Unknown / Prefer not to say race__7
03-12-2018	1	Checked (1)	Unchecked (0)	Unchecked (0)	Hispanic or Latino (0)	Unchecked (0)	Unchecked (0)	Unchecked (0)	Unchecked (0)	Checked (1)	Unchecked (0)	Unchecked (0)	Unchecked (0)
03-13-2018	2	Checked (1)	Unchecked (0)	Unchecked (0)	Not Hispanic or Latino (1)	Unchecked (0)	Unchecked (0)	Unchecked (0)	Unchecked (0)	Checked (1)	Unchecked (0)	Unchecked (0)	Unchecked (0)
03-14-2018	3	Checked (1)	Unchecked (0)	Unchecked (0)	Unknown / Prefer not to say (2)	Checked (1)	Unchecked (0)	Unchecked (0)	Unchecked (0)	Unchecked (0)	Unchecked (0)	Unchecked (0)	Unchecked (0)
03-15-2018	4	Checked (1)	Unchecked (0)	Unchecked (0)	Not Hispanic or Latino (1)	Unchecked (0)	Unchecked (0)	Unchecked (0)	Unchecked (0)	Checked (1)	Unchecked (0)	Unchecked (0)	Unchecked (0)
03-27-2018	5	Unchecked (0)	Checked (1)	Unchecked (0)	Not Hispanic or Latino (1)	Unchecked (0)	Unchecked (0)	Unchecked (0)	Unchecked (0)	Checked (1)	Unchecked (0)	Unchecked (0)	Unchecked (0)
03-28-2018	6	Unchecked (0)	Checked (1)	Unchecked (0)	Not Hispanic or Latino (1)	Unchecked (0)	Unchecked (0)	Unchecked (0)	Unchecked (0)	Checked (1)	Unchecked (0)	Unchecked (0)	Unchecked (0)
03-28-2018	7	Unchecked (0)	Checked (1)	Unchecked (0)	Not Hispanic or Latino (1)	Unchecked (0)	Unchecked (0)	Unchecked (0)	Unchecked (0)	Checked (1)	Unchecked (0)	Unchecked (0)	Unchecked (0)
03-30-2018	8	Unchecked (0)	Checked (1)	Unchecked (0)	Not Hispanic or Latino (1)	Unchecked (0)	Unchecked (0)	Unchecked (0)	Unchecked (0)	Checked (1)	Unchecked (0)	Unchecked (0)	Unchecked (0)
04-02-2018	9	Unchecked (0)	Checked (1)	Unchecked (0)	Not Hispanic or Latino (1)	Unchecked (0)	Unchecked (0)	Unchecked (0)	Unchecked (0)	Checked (1)	Unchecked (0)	Unchecked (0)	Unchecked (0)
05-14-2018	10	Checked (1)	Unchecked (0)	Unchecked (0)	Not Hispanic or Latino (1)	Unchecked (0)	Unchecked (0)	Unchecked (0)	Unchecked (0)	Unchecked (0)	Checked (1)	Unchecked (0)	Unchecked (0)

Image 12: Data Exports, Reports, and Stats screen

From here, you can see stats and charts, export the report to a computer-readable format, or edit the parameters for the report.

Michele Demographics (5/16/2018)

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](#)

Date

Total Count (N)	Missing
10	0 (0.0%)

Gender [Refresh Plot](#)

Total Count (N)	Missing	Unique
10	0 (0.0%)	2

Counts/frequency: Male (5, 50.0%), Female (5, 50.0%), Other / Prefer not to say (0, 0.0%)

Ethnicity [Refresh Plot](#) | View as Bar Chart

Total Count (N)	Missing	Unique
10	0 (0.0%)	3

Counts/frequency: Hispanic or Latino (1, 10.0%), Not Hispanic or Latino (8, 80.0%), Unknown / Prefer not to say (1, 10.0%)

Race [Refresh Plot](#)

Total Count (N)	Missing	Unique
10	0 (0.0%)	3

Counts/frequency: More than One Race (1, 10.0%), American Indian / Alaska Native (0, 0.0%), Asian (0, 0.0%), Native Hawaiian or Other Pacific Islander (0, 0.0%), White (8, 80.0%), Black or African American (1, 10.0%), Other not Listed (0, 0.0%), Unknown / Prefer not to say (0, 0.0%)

Shown left: The Stats & Charts screen

Shown below: The Export window

Exporting "Michele Demographics (5/16/2018)"

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

Choose export format

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

De-identification options (optional)

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

Known Identifiers:

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

Free-form text:

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

Date and datetime fields:

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

[Deselect all options](#)

[Export Data](#) [Cancel](#)