OVERVIEW

• Getting started
• Project creation
• Project development
• Production mode
Request an UA REDCap user account at

https://redcap.uahs.arizona.edu/surveys/?s=3NE9TCW98R
getting started

Login at redcap.uahs.arizona.edu

**REDCap**

Log In

**NOTE:** If you have a REDCap account and have not logged in during the past 12 months your account will be temporarily suspended. Please contact us at redcap@email.arizona.edu to have your account unsuspended.

Please log in with your user name and password. If you are having trouble logging in, please contact REDCap Support.

Username: [Enter]

Password: [Enter]

Log In

Forgot your password?
getting started

Explore the training and help resources.

Welcome to REDCap!

REDCap is a secure, web-based application for building and managing online surveys and databases. Using REDCap's streamlined process for rapidly developing projects, you may create and design projects using 1) the online method from your web browser using the Online Designer, and/or 2) the offline method by constructing a data dictionary template file in Microsoft Excel, which can be later uploaded into REDCap. Both surveys and databases (or a mixture of the two) can be built using these methods.

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.

Please note that any publication that results from a project utilizing REDCap should cite grant support (1 UL1 RR24975 from NCRR/NIH).

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 Administrator.
Project creation

On the ‘Create New Project’ tab, enter the project title and choose a purpose.

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?)

Start project from scratch or begin with a template?
- Create an empty project (blank slate)
- Use a template (choose one below)
Next, choose blank slate or a template, and then click ‘Create Project’.

---

**Choose a project template**

<table>
<thead>
<tr>
<th>Template title</th>
<th>Template description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic Demography</td>
<td>Contains a single data collection instrument to capture basic demographic information.</td>
</tr>
<tr>
<td>Classic Database</td>
<td>Contains six data entry forms, including forms for demography and baseline data, three monthly data forms, and concludes with a completion data form.</td>
</tr>
<tr>
<td>Human Cancer Tissue Biobank</td>
<td>Contains five data entry forms for collecting and tracking information for cancer tissue.</td>
</tr>
<tr>
<td>Longitudinal Database (1 arm)</td>
<td>Contains nine data entry forms (beginning with a demography form) for collecting data longitudinally over eight different events.</td>
</tr>
<tr>
<td>Longitudinal Database (2 arms)</td>
<td>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.</td>
</tr>
</tbody>
</table>
Within the new project, you’ll see the navigational links, project title, and project setup tab.
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.
The Online Designer is the fast, easy way to build instruments entirely online. Customize existing instruments, and create new ones.

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.

<table>
<thead>
<tr>
<th>Instrument name</th>
<th>Fields</th>
<th>View PDF</th>
<th>Enabled as survey</th>
<th>Instrument actions</th>
<th>Survey-related options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consent</td>
<td>7</td>
<td>✔️</td>
<td>Enable</td>
<td>Choose action</td>
<td></td>
</tr>
<tr>
<td>Demographics</td>
<td>12</td>
<td>✔️</td>
<td>Enable</td>
<td>Choose action</td>
<td></td>
</tr>
<tr>
<td>Diagnosis</td>
<td>7</td>
<td>✔️</td>
<td>Enable</td>
<td>Choose action</td>
<td></td>
</tr>
<tr>
<td>Medical History</td>
<td>19</td>
<td>✔️</td>
<td>Enable</td>
<td>Choose action</td>
<td></td>
</tr>
<tr>
<td>Lab Values</td>
<td>2</td>
<td>✔️</td>
<td>Enable</td>
<td>Choose action</td>
<td></td>
</tr>
<tr>
<td>Visit Information</td>
<td>4</td>
<td>✔️</td>
<td>Enable</td>
<td>Choose action</td>
<td></td>
</tr>
</tbody>
</table>
The Online Designer makes it easy to customize existing fields and add new fields.
Many field types are available, as well as field options.

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

- **Field Label**: Diabetes status

- **Variable Name**: `diabetes_status`
  - **Enable auto naming of variable based upon its Field Label?**: Yes

- **Required?**: No

- **Identifier?**: No

- **Custom Alignment**: Right / Vertical (RV)

- **Field Note**: Explanatory notes - not displayed on any page

How do I manually code the choices?
The Data Dictionary method uses a spreadsheet to build instruments. Edit your project fields in Excel, and then upload the new dictionary.

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 amount of fields for this project.

This module may be used for making changes to the project, such as adding new fields or modifying existing fields, by using an offline method called the Data Dictionary. The Data Dictionary is a specifically formatted CSV (comma delimited) file within which you may construct your project fields and afterward upload the file here to commit the changes to your project.

Click the 'browse' or 'Choose File' button below to select the file on your computer, and upload it by clicking the 'Upload File' button. Once your file has been uploaded, changes will NOT immediately be made but will be displayed and checked for errors to ensure that all the formatting in your Data Dictionary is correct before official changes are made to the project.

Need some help?
If you wish to view an example of how your Data Dictionary may be formatted, you may download the Data Dictionary demonstration file, or you may view the Data Dictionary Tutorial Video (10 min). For help setting up your Data Dictionary, you may also see the instructions listed on the Help & FAQ.

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

Upload your Data Dictionary file (CSV file format only)
Format for min/max validation values for date and datetime fields: MM/DD/YYYY or YYYY-MM-DD

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

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Variable / Field Name</td>
<td>Form Name</td>
<td>Section Header</td>
<td>Field Type</td>
<td>Field Label</td>
</tr>
<tr>
<td>2</td>
<td>record_id</td>
<td>basic_demography_form</td>
<td>text</td>
<td>Study ID</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>first_name</td>
<td>basic_demography_form</td>
<td>Contact Information</td>
<td>text</td>
<td>First Name</td>
</tr>
<tr>
<td>4</td>
<td>last_name</td>
<td>basic_demography_form</td>
<td>text</td>
<td>Last Name</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>address</td>
<td>basic_demography_form</td>
<td>notes</td>
<td>Street, City, State, ZIP</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>telephone</td>
<td>basic_demography_form</td>
<td>text</td>
<td>Phone number</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>email</td>
<td>basic_demography_form</td>
<td>text</td>
<td>E-mail</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>dob</td>
<td>basic_demography_form</td>
<td>text</td>
<td>Date of birth</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>age</td>
<td>basic_demography_form</td>
<td>calc</td>
<td>Age (years)</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>ethnicity</td>
<td>basic_demography_form</td>
<td>radio</td>
<td>Ethnicity</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>race</td>
<td>basic_demography_form</td>
<td>dropdown</td>
<td>Race</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>sex</td>
<td>basic_demography_form</td>
<td>radio</td>
<td>Gender</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>height</td>
<td>basic_demography_form</td>
<td>text</td>
<td>Height (cm)</td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>weight</td>
<td>basic_demography_form</td>
<td>text</td>
<td>Weight (kilograms)</td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>bmi</td>
<td>basic_demography_form</td>
<td>calc</td>
<td>BMI</td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>comments</td>
<td>basic_demography_form</td>
<td>General Comments</td>
<td>notes</td>
<td>Comments</td>
</tr>
</tbody>
</table>
Use the Data Collection section to test your instruments by entering test data. Entering test data will often lead to more instrument changes.
Test the Applications as well. The way you need the applications to function can also lead to changes to your instruments.
Use the Setup tab checklist to track your progress.

- **Main project settings**
  - Use longitudinal data collection with repeating forms?
  - Use surveys in this project?
  - [VIDEO: How to create and manage a survey]

- **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]

- **Enable optional modules and customizations**
  - Auto-numbering for records
  - Scheduling module (longitudinal only)
  - Randomization module
  - Designate an email field to use for invitations to survey participants

Completed steps 2 of 7
MOVE TO PRODUCTION

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 by checking this box.
Production mode works just like development mode. Changes can still be made to the project in “Draft Mode” which has extra precautions to protect saved data.
The Online Designer and Data Dictionary can still be used to modify instruments. Click on the ‘Online Designer’. Then click on ‘Enter Draft Mode’ to make and submit changes.

**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 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?

---

**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.

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

**Enter Draft Mode**
FOR FURTHER help

- [https://cb2.uahs.arizona.edu/services-tools/surveys-clinical-databases-redcap](https://cb2.uahs.arizona.edu/services-tools/surveys-clinical-databases-redcap)

- dionisiasaner@email.arizona.edu

**website**

**COMP only contact**