



Quick Start Guide



IWK Health

Research &
Innovation
Advancement

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- Getting started
- Project creation
- Project development
- Production mode

Login at

<https://research-survey.nshealth.ca/>



Log In

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

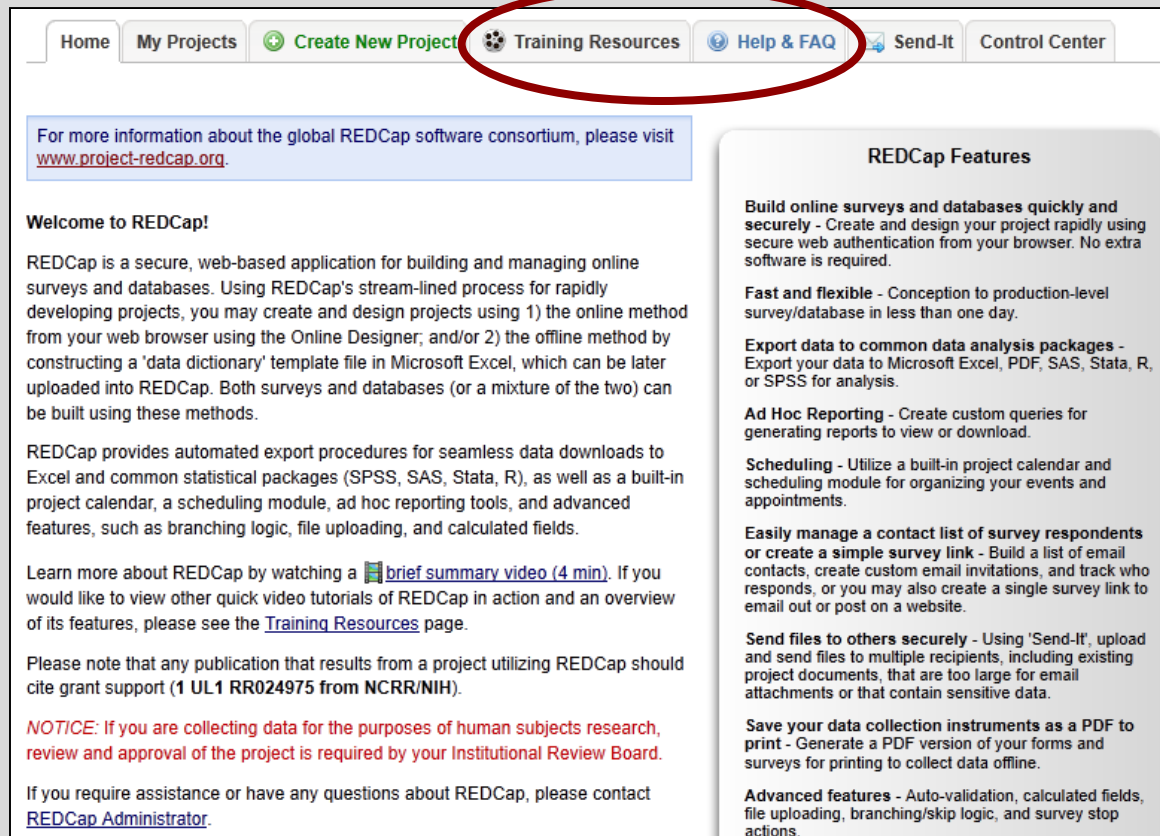
Username:

Password:

Log In

[Forgot your password?](#)

Explore the training and help resources.



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

For more information about the global REDCap software consortium, please visit www.project-redcap.org.

Welcome to REDCap!

REDCap is a secure, web-based application for building and managing online surveys and databases. Using REDCap's stream-lined 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 RR024975 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.

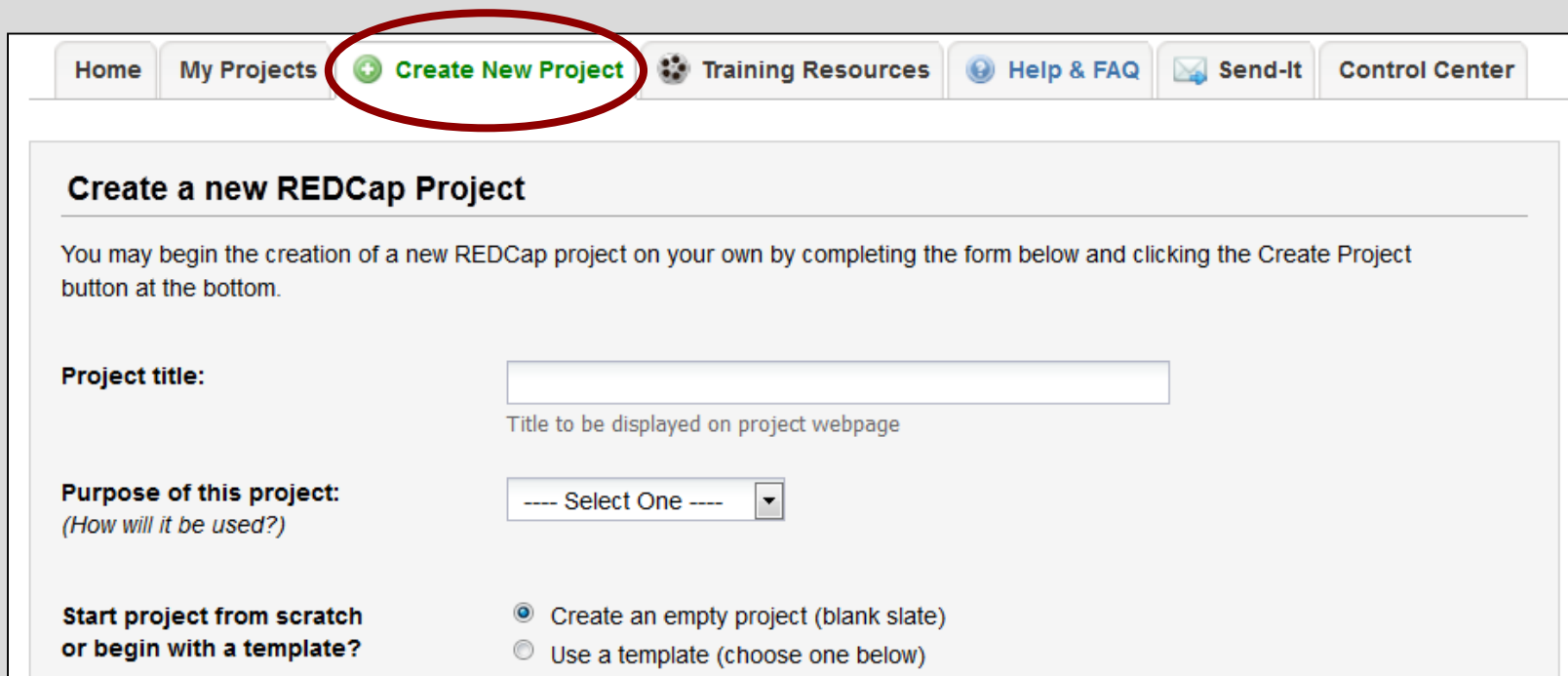
If you require assistance or have any questions about REDCap, please contact [REDCap Administrator](#).

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

Project creation

On the 'Create New Project' tab, enter the project title and choose a 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?)

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 blank slate or a template, and then click 'Create 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)

select template	Template title (sorted by title)	Template description
<input checked="" 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"/>	Human Cancer Tissue Biobank	Contains five data entry forms for collecting and tracking information for cancer tissue.
<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 HOME PAGE

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

The screenshot shows the REDCap interface for a 'DEMONSTRATION PROJECT'. The page title 'DEMONSTRATION PROJECT' is circled in red. The navigation tabs include 'Project Home', 'Project Setup' (circled in red), 'Other Functionality', and 'Project Revision History'. The project status is 'Development' and 'Completed steps 0 of 6'. The main content area is divided into three sections: 'Main project settings', 'Design your data collection instruments', and 'Enable optional modules and customizations'. Each section has a 'Not started' status and an 'I'm done!' button. The left sidebar contains a navigation menu with sections for 'Data Collection' and 'Applications'.

REDCap™

Logged in as red_0004 | Log out

My Projects
Project Home
Project Setup
Project status: Development

Data Collection [Edit instruments](#)

Record Status Dashboard
- View data collection status of all records

Add / Edit Records
- Create new records or edit/view existing ones

Data Collection Instruments:
Basic Demography Form

Applications

- Calendar
- Data Export Tool
- Data Import Tool
- Data Comparison Tool
- Logging
- File Repository
- User Rights
- Graphical Data View & Stats
- Data Quality
- Report Builder

DEMONSTRATION PROJECT

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

Project status: Development Completed steps 0 of 6

Main project settings

Not started

Enable Use longitudinal data collection with repeating forms? ?

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

I'm done!

Modify project title, purpose, etc.

Design your data collection instruments

Not started

I'm done!

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 or

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

Enable optional modules and customizations

Optional

Enable Auto-numbering for records ?


Enable Scheduling module (longitudinal only) ?

Enable Randomization module ?

Enable Designate an email field to use for invitations to survey participants ?

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.



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), 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 or

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

ONLINE DESIGNER

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

◀ Project Setup Online Designer Data Dictionary ⚙ Edit project settings in Control Center

 [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 Collection Instruments

Survey options:

- ☰ Survey Queue
- 🔑 Survey Login
- ✉ Survey Notifications

Add new instrument:

- + Create** 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
Consent	7		<input type="button" value="Enable"/>	<input type="button" value="Choose action"/>	
Demographics	12		<input type="button" value="Enable"/>	<input type="button" value="Choose action"/>	
Diagnosis	7		<input type="button" value="Enable"/>	<input type="button" value="Choose action"/>	
Medical History	19		<input type="button" value="Enable"/>	<input type="button" value="Choose action"/>	
Lab Values	2		<input type="button" value="Enable"/>	<input type="button" value="Choose action"/>	
Visit Information	4		<input type="button" value="Enable"/>	<input type="button" value="Choose action"/>	

FIELD DEVELOPMENT






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

Current instrument: **Diagnosis** Preview instrument

Add Field Add Matrix of Fields






  **Diabetes Status**

Add Field Add Matrix of Fields

     Variable: diabetes_status

Diabetes status ▼

Add Field Add Matrix of Fields

     Variable: diag_symptoms

Symptoms at time of diagnosis

- Tired/weak/difficulty feeding
- Trouble breathing / breathing fast
- Weight loss / trouble with gaining weight
- Drinking more
- Frequent urination
- Other (please describe in next question)

Add Field Add Matrix of Fields

FIELD TYPES AND OPTIONS

Many field types are available, as well as field options.

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: Multiple Choice - Drop-down List (Single Answer) ▼

Field Label [How to use Piping](#)

Diabetes status

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

0, Not diabetic
1, Diabetic
2, Possible pre-diabetic
3, Transient in remission
4, Transient in relapse
5, Unknown

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

Variable Name (utilized during data export)

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

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

Field Annotation Explanatory notes - not displayed on any page ?

The Data Dictionary method uses a spreadsheet to build instruments. Edit your project fields in Excel, and then upload the new dictionary.

 [VIDEO: How to use this page](#)

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 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: 

Browse...



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/Alas
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]*10000
16	comments	basic_demography_form	General Comments	notes	Comments	

TEST DATA COLLECTION

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

My Projects
Project Home
Project Setup
Project status: **Development**

Data Collection [Edit instruments](#)

Record Status Dashboard
View the collection status of all records

Add / Edit Records
Create new records, edit/view existing ones

Data Collection Instruments:
Consent
Demographics
Diagnosis
Medical History
Lab Values
Visit Information

Consent

You may view an existing record/response by selecting it from one of the drop-down lists below. The records are separated into each drop-down list according to their status for this particular data collection instrument. To create a new record/response, type a new value in the text box below and hit Tab or Enter. To quickly find a record without using the drop-downs, the text box will auto-populate with existing record names as you begin to type in it, allowing you to select it.

Total records: 35

Incomplete Records (33)	-- select record --
Unverified Records (1)	-- select record --
Complete Records (1)	-- select record --
Enter a new or existing Subject ID	<input type="text"/>

[Hide Unverified Records drop-down](#)

TEST APPLICATIONS

Test the Applications as well. The way you need the applications to function can also lead to changes to your instruments.

The screenshot displays the REDCap interface for a 'DEMONSTRATION PROJECT'. The left sidebar contains the REDCap logo, user information (Logged in as red_0004), navigation links (My Projects, Project Home, Project Setup), and a 'Data Collection' section with 'Edit instruments' and 'Record Status Dashboard'. A red bracket highlights the 'Applications' section, which includes: Calendar, Data Export Tool, Data Import Tool, Data Comparison Tool, Logging, File Repository, User Rights, Graphical Data View & Stats, Data Quality, and Report Builder. The main content area shows project status (Development) and 'Completed steps 0 of 6'. Three sections are visible: 'Main project settings' (Not started), 'Design your data collection instruments' (Not started), and 'Enable optional modules and customizations' (Optional). Each section has 'I'm done!' buttons and 'Enable' buttons for various features.

REDCap™

Logged in as red_0004 | Log out

My Projects
Project Home
Project Setup

Project status: **Development**

Data Collection [Edit instruments](#)

Record Status Dashboard
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- Graphical Data View & Stats
- Data Quality
- Report Builder

DEMONSTRATION PROJECT

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

Project status: Development Completed steps **0** of **6**

Main project settings

Not started

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

Not started

or

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](#)

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 [?](#)

Scheduling module (longitudinal only) [?](#)

Randomization module [?](#)

Designate an email field to use for invitations to survey participants [?](#)

COMPLETE STEPS


Use the Setup tab checklist to track your progress.

The screenshot shows the REDCap Project Setup interface. At the top, there are four tabs: Project Home, Project Setup (selected), Other Functionality, and Project Revision History. Below the tabs, the project status is 'Development'. A red circle highlights the text 'Completed steps 2 of 7'. The checklist consists of three sections:

- Main project settings:** Marked as 'Complete!'. It includes options to 'Enable' 'Use longitudinal data collection with repeating forms?' and 'Use surveys in this project?'. A video link 'VIDEO: How to create and manage a survey' is provided. A button 'Modify project title, purpose, etc.' is also present.
- Design your data collection instruments:** Marked as 'Complete!'. It includes instructions on adding or editing fields and quick links to 'Download PDF of all data collection instruments' and 'Download the current Data Dictionary'. Buttons for 'Online Designer' and 'Data Dictionary' are shown. A link to 'REDCap Shared Library' and a note about 'Check For Identifiers' are also included.
- Enable optional modules and customizations:** Marked as 'Optional'. It includes options to 'Enable' 'Auto-numbering for records?', 'Scheduling module (longitudinal only)?', 'Randomization module?', and 'Designate an email field to use for invitations to survey participants?'. A button 'I'm done!' and a link to 'Additional customizations' are also present.

MOVE TO PRODUCTION

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



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 then need to be approved by a REDCap administrator before taking effect.

Go to [Move project to production](#)

You can delete all practice data by checking this box.

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. By leaving the checkbox checked 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?

Delete ALL data, calendar events, documents uploaded for records/responses, and (if applicable) survey responses?

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 then need to be approved by a REDCap administrator before taking effect.

[YES, Move to Production Status](#) [Cancel](#)

MOVE TO PRODUCTION

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 screenshot displays the REDCap user interface for a project titled "DEMONSTRATION PROJECT". On the left is a navigation sidebar with the REDCap logo, user information ("Logged in as red_0004 | Log out"), and menu items for "My Projects", "Project Home", "Project Setup", "Data Collection", and "Applications". The "Project Setup" menu item is highlighted, and the "Project status" is shown as "Production".


The main content area features a navigation bar with buttons for "Project Home", "Project Setup", "Other Functionality", and "Project Revision History". A prominent green success message reads: "Success! The project is now in production." Below this, the "Project status" is confirmed as "Production".

The "Main project settings" section includes a "Complete!" indicator with a green checkmark. A note states: "Some options below are disabled because they may not be modified once the project is in production status." The settings are as follows:

- Use longitudinal data collection with repeating forms?** [?] (Disabled)
- Use surveys in this project?** [?] (Disabled)

A link for "VIDEO: How to create and manage a survey" is provided. A "Modify project title, purpose, etc." button is also visible.

The Online Designer and Data Dictionary can still be used to modify instruments. Click on the ‘Online Designer’.



Optional

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 or

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

Then click on ‘Enter Draft Mode’ to make and submit changes.

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?

Acknowledgement: The original content of this document was provided by The Center for Research Informatics at The University of Chicago: <http://cri.uchicago.edu/redcap-training/>