REDCap Practice Workshop: Answer Key
CCTS Biostatistics Core
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Introduction

REDCap is a secure, web-based application for building and managing online surveys and databases. REDCap’s easy design environment allows you to quickly create web-based databases and data capture forms with special features like ad-hoc reporting and scheduling.

How to Use This Workshop

This workshop will lead you through the process of creating and customizing a project in REDCap. Each step demonstrates one or more core elements of the platform, including creating projects, building forms, collecting responses, and downloading data for analysis.

For each exercise, the tasks you need to complete are described in text. An answer key with screenshots is also available to illustrate each step. We recommend that you work through the exercises in order, as many refer to previous sections.

To complete this workshop, you will need a full-access REDCap user account. If you do not have a full-access account, you can request one through the CCTS workflow system.

Resources and Support

For information about UIC’s REDCap, see the CCTS website.

More about the platform and additional training resources are available through the Project REDCap website.

If you still have questions after completing this workshop, please contact the CCTS REDCap support team at redcapihrp@uic.edu.
Project Setup

In this section, you will create a new sample project in REDCap and add users with custom data-access rights.

Creating a New Project

Log in to the CCTS REDCap system. Create a new blank project with the title “[your name]_Test [date].” Select “Practice / Just for fun” as the project purpose.

1. Visit https://ccts-redcap.ihrp.uic.edu and log in with your username and password.
2. At the top of the REDCap home screen, click + New Project.
3. Fill out each project field. Then click Create Project.

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Log In

By logging into the CCTS REDCap system, you agree to our Terms of Use. Please read the policies located here.

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

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Figure 1: Visit https://ccts-redcap.ihrp.uic.edu and log in with your username and password.

---

Figure 2: At the top of the REDCap home screen, click + New Project.
Figure 3: Fill out each project field. Then click Create Project.

Open the Online Designer to start customizing your project.

1. In the left menu under Project Home and Design, click Project Setup.
2. Click Online Designer.

Figure 4: In the left menu under Project Home and Design, click Project Setup.
Figure 5: Click Online Designer.

Tip: You can also access the Online Designer directly. Click Designer in the left menu under Project Home and Design.

Figure 6: Click Designer in the left menu under Project Home and Design.

**User Rights**

Add another user to your project and set the user’s Data Exports privileges to No Access.

1. In the left menu under Applications, click on User Rights.
2. Enter the user’s REDCap username or email address in the top box and click Add with custom rights.
3. Under Privileges for data exports, select No Access. Review all other settings and then click Add user.
Figure 7: In the left menu under Applications, click on **User Rights**.

Figure 8: Enter the user’s REDCap username or email address in the top box and click **Add with custom rights**.
Figure 9: Under Privileges for data exports, select **No Access**. Review all other settings and then click **Add user**.

Tip: If you have several users who will need the same level of access to your project, consider creating a named role with defined privileges. You can then assign new users to this role.
Figure 10: Create a named role with defined privileges.
Data Collection Instruments

In this section, you will create two data collection instruments.

Eligibility Questionnaire

Create a data collection instrument (form) called “Eligibility Questionnaire.”

1. Click Designer in the left menu under Project Home and Design.
2. Click + Create. Then click + Add instrument here.
3. Type the instrument name and click Create.

![Figure 11: Click + Create. Then click + Add instrument here.]

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.

![Figure 12: Type the instrument name and click Create.]

Build the Eligibility Questionnaire using the field names, field types, and validation rules listed in Table 1. See Field Details for more detailed instructions.

1. To open the instrument for editing, click its name.
2. Add a field by clicking Add Field in the desired location.
3. Select a field type from the dropdown menu. Review and set each field attribute. Then click Save.
Figure 13: To open the instrument for editing, click its name.

Figure 14: Add a field by clicking Add Field in the desired location.
Figure 15: Select a field type from the dropdown menu. Review and set each field attribute. Then click **Save**.

### Table 1: Eligibility Questionnaire Field Properties

<table>
<thead>
<tr>
<th>Field</th>
<th>Field Type</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Record ID</td>
<td>Text Box</td>
<td>Validation: “Integer”</td>
</tr>
<tr>
<td>2. Child’s First Name</td>
<td>Text Box</td>
<td>Mark this field as an identifier.</td>
</tr>
<tr>
<td>3. Child’s Last Name</td>
<td>Text Box</td>
<td>Mark this field as an identifier.</td>
</tr>
<tr>
<td>4. Parent’s Email</td>
<td>Text Box</td>
<td>Validation: “Email”</td>
</tr>
<tr>
<td>5. Screening Date</td>
<td>Text Box</td>
<td>Validation: “Date (M-D-Y)”</td>
</tr>
<tr>
<td>6. Child’s Date of Birth</td>
<td>Text Box</td>
<td>Validation: “Date (M-D-Y)”</td>
</tr>
<tr>
<td>7. Child’s Age</td>
<td>Calculated Field</td>
<td>Write an equation that calculates the child’s age from Screening Date and Child’s Date of Birth.</td>
</tr>
<tr>
<td>8. English Fluency</td>
<td>Yes-No</td>
<td></td>
</tr>
<tr>
<td>(Understood/Spoken)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9. Ethnicity</td>
<td>Multiple Choice - Radio Buttons (Single Answer)</td>
<td>Options: 1) Hispanic; 2) Non-Hispanic; 9) Other</td>
</tr>
<tr>
<td>10. Specify Ethnicity</td>
<td>Text Box</td>
<td>Use branching logic to make this field available when Ethnicity = “Other”</td>
</tr>
<tr>
<td>11. Child’s Height (unit in cm)</td>
<td>Text Box</td>
<td>Validation: “Number”</td>
</tr>
</tbody>
</table>
12. Child’s Weight (unit in kg)  
Text Box  
Validation: “Integer”

13. BMI  
Calculated Field  
Write an equation that calculates BMI from Child’s Height and Child’s Weight.

14. Are you the parent or legal guardian of [Child’s First Name]?  
Multiple Choice - Radio Buttons (Single Answer)  
Options: 1) Yes; 0) No (Ineligible). Use piping to display Child’s First Name in the question text.

15. Treated for asthma exacerbation?  
Multiple Choice - Radio Buttons (Single Answer)  
Options: 1) Yes; 0) No (Ineligible)

16. Sorry, you’re not eligible.  
Descriptive Text  
Use branching logic to show this text when ineligible answers are selected for questions 14 or 15.

17. Thanks. You’re eligible to participate in our research study.  
Descriptive Text  
Use branching logic to show this text when eligible answers are selected for questions 14 and 15. Use HTML to make the text larger and red.

**Pediatric Asthma Caregiver’s Quality of Life Questionnaire**

Create a data collection instrument called “Pediatric Asthma Caregiver’s Quality of Life Questionnaire.”

1. Click Designer in the left menu under Project Home and Design.
2. Click + Create. Then click + Add instrument here.
3. Type the instrument name and click Create.

Build the Pediatric Asthma Caregiver’s Quality of Life Questionnaire using the field names, field types, and validation rules listed in Table 2. See Field Details for more detailed instructions.

1. To open the instrument for editing, click its name.
2. Add a field by clicking Add Field in the desired location.
3. Select a field type from the dropdown menu. Review and set each field attribute. Then click Save.

**Table 2: Pediatric Asthma Caregiver’s Quality of Life Questionnaire**

**Field Properties**

<table>
<thead>
<tr>
<th>Field</th>
<th>Field Type</th>
<th>Response Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. During the past week, how often did you feel helpless or frightened when your child experienced cough, wheeze, or breathlessness? [Check only one response]</td>
<td>Multiple Choice - Radio Buttons (Single Answer)</td>
<td>7) All of the time; 6) Most of the time; 5) Quite often; 4) Some of the time; 3) Once in a while; 2) Hardly any of the time; 1) None of the time</td>
</tr>
<tr>
<td>2. Please check all that happened to your child during last week [Check all that apply]</td>
<td>Checkboxes (Multiple Answers)</td>
<td>1) Cough; 2) Wheeze; 3) Breathlessness; 4) Skin rash</td>
</tr>
</tbody>
</table>

**General Tips**

To copy or rename an existing instrument, use the menu under Instrument actions.
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.

![Online Designer interface](image)

**Figure 16**: To copy or rename an existing instrument, use the menu under Instrument actions.

We highly recommend that you create a short variable name for each field, rather than allowing auto-naming. Shorter names are easier to use in branching logic, piping, and exported datasets.

![Variable Name interface](image)

**Figure 17**: We highly recommend that you create a short variable name for each field, rather than allowing auto-naming.

If any field contains identifying information such as name, SSN, or address, mark it as an identifier. Control who can view and download identifiers with the User Rights module.

![Field Identification interface](image)

**Figure 18**: If any field contains identifying information such as name, SSN, or address, mark it as an identifier.
Tips for multiple-choice and checkbox fields:

- Each choice must consist of a numeric code, a comma separator (","), and a text label.
- Assign choice codes that match your needs during analysis. For example, you may choose larger numbers to correspond to more severe symptoms.
- Checkbox fields allow participants to choose more than one response. In the underlying dataset, REDCap creates a dummy variable for each response option. For example, the quality-of-life survey question about asthma symptoms allows participants to check up to four boxes. The underlying dataset includes the dummy variables `child_symptoms_1`, `child_symptoms_2`, `child_symptoms_3`, and `child_symptoms_4`, each with a value of 0 for no (unchecked) and 1 for yes (checked). Branching logic based on checkboxes takes the form 
  \[ \text{child_symptoms(1)} = '1' \].

**Figure 19:** Each choice must consist of a numeric code, a comma separator (",") and a text label.

**Figure 20:** Assign choice codes that match your needs during analysis. For example, you may choose larger numbers to correspond to more severe symptoms.

**Figure 21:** The underlying dataset includes the dummy variables `child_symptoms_1`, `child_symptoms_2`, `child_symptoms_3`, and `child_symptoms_4`, each with a value of 0 for no (unchecked) and 1 for yes (checked).
Branching logic allows you to show or hide survey questions based on responses to other questions. For example, you may choose to show a comment box only when a participant responds “Other” to a multiple-choice question.

- To define branching logic for a question, click the green arrows above the question text.
- You can enter the syntax manually or use the Drag-N-Drop Logic Builder.

Figure 22: To define branching logic for a question, click the green arrows above the question text.

Choose method below for the following field: ethn_oth - Specify Ethnicity

- **Advanced Branching Logic Syntax**
  
  Show the field ONLY if...
  
  
  `[ethn] = '9'`

  Test logic with a record: -- select record --

  Clear logic

- OR

- **Drag-N-Drop Logic Builder**

  Displaying field choices for the following data collection instrument:
  
  Eligibility Questionnaire

  Field choices from other fields
  
  (drag a choice below to box on right)

  - ethn = Hispanic (1)
  - ethn = Non-Hispanic (2)
  - ethn = Other (9)
  - eligibility_questionnaire_complete = Incomplete (0)
  - eligibility_questionnaire_complete = Unverified

  Show the field ONLY if...
  
  - ALL below are true
  - ANY below are true

Save  Cancel

Figure 23: You can enter the syntax manually or use the Drag-N-Drop Logic Builder.
Piping allows a subject’s previous survey responses to be incorporated into later questions. To use piping, include the relevant variable name, enclosed in brackets, in the text of another question. For more help with piping, click the purple Piping button.

Figure 24: To use piping, include the relevant variable name, enclosed in brackets, in the text of another question.

You can format text in two ways.

- Use HTML syntax to change font size, color, and formatting.
- Use the Rich Text Editor to interactively format text.

Figure 25: Use HTML syntax to change font size, color, and formatting.
Thanks. You’re eligible to participate in our research study.

Figure 26: Use the Rich Text Editor to interactively format text.

Field Details: Eligibility Questionnaire

NOTE: This field is the record ID field, which is the first field in the project. This field is special because it is used to store the names of the records in your project. Thus the record ID field cannot be deleted or moved but only edited. If you wish, you may change its field label or even its variable name.

Figure 27: Record ID. This field is the unique identifier for each subject and cannot be deleted or moved. We recommend you manually define a variable name instead of enabling auto-naming.
Figure 28: **Child’s First Name.** Be sure to mark this field as an identifier.

Figure 29: **Child’s Last Name.** Mark this field as an identifier.

Figure 30: **Parent’s Email.** Choose the Email validation option.
Figure 31: **Screening Date. Choose the Date validation option.**

Figure 32: **Child’s Date of Birth. Choose the Date validation option.**
Figure 33: Child’s Age. This field can be calculated with an equation of the form
rounddown(datediff([dob],[screen_date],"y","mdy",true)). Be sure to use the correct variable names for
date of birth and screening date. For more information about calculated fields, click How do I format the equation?

Figure 34: English Fluency (Understood/Spoken). Choices for the Yes-No field type cannot be edited.
Figure 35: **Ethnicity.** Define choice options and labels in the Choices box.

Figure 36: **Specify Ethnicity.** Use branching logic to display this field if the previous response indicated Other ethnicity. See the General Tips for more about branching logic.
Figure 37: **Child's Height (unit in cm).** Use the Number validation option. Specify minimum and maximum values if desired.

Figure 38: **Child's Weight (unit in kg).** Use the Number validation option. Specify minimum and maximum values if desired.
Figure 39: **BMI.** This field can be calculated with an equation of the form \[
\frac{\text{[weight]}}{\left(\frac{\text{[height]}}{100}\right) \times \left(\frac{\text{[height]}}{100}\right)}
\]. Be sure to use the correct variable names for weight and height.

Figure 40: **Are you the parent or legal guardian of [Child's First Name]?** Use piping and the variable name \(\text{firstname}\) to reference the text entered in the Child's First Name field. For more information about piping, click the purple Piping button. Note that the Yes-No field type would also work for this question.
Figure 41: Treated for asthma exacerbation? Note that the Yes-No field type would also work for this question.

Figure 42: Sorry, you’re not eligible. Choose Descriptive Text as the field option. Use branching logic to display this text if either question 14 or question 15 was answered No. See the General Tips for more about branching logic.
Thanks. You’re eligible to participate in our research study.

Field Details: Pediatric Asthma Caregiver’s Quality of Life Questionnaire

During the past week, how often did you feel helpless or frightened when your child experienced cough, wheeze, or breathlessness? Choose the Multiple Choice field type. Define choice codes and labels in the Choices box.
Figure 45: Please check all that happened to your child during last week. Choose the Checkboxes field type. Define choice codes and labels in the Choices box.
Adding, Viewing, and Exporting Data

In this section, you will practice adding and viewing individual project records within REDCap. You will also export data for analysis.

**Adding a Record**

Create a new record. Add sample data to each field on each form. Try to enter nonsensical data to test the validation rules.

1. Click on **Add / Edit Records**.
2. Click **+ Add new record**.
3. Click the gray status icon beside the first data collection instrument to begin editing the record.
4. Enter data into each form as if you were a study participant.
5. An error alert will indicate when validation rules have been violated.
6. When you have tested all fields on a form, save and exit.

---

**Add / Edit Records**

You may view an existing record/response by selecting it from the drop-down lists below. To create a new record/response, click the button below.

NOTICE: This project is currently in Development status. **Real data should NOT be entered** until the project has been moved to Production status.

---

Total records: 2

Choose an existing Record ID

![Select record dropdown]

[Add new record]
Record Home Page

Record "3" is a new Record ID. To create the record and begin entering data for it, click any gray status icon below.

The grid below displays the form-by-form progress of data entered for the currently selected record. You may click on the colored status icons to access that form/event. If you wish, you may modify the events below by navigating to the Define My Events page.

Legend for status icons:
- Incomplete
- Incomplete (no data saved)
- Unverified
- Partial Survey Response
- Complete
- Completed Survey Response

NEW Record ID 3

<table>
<thead>
<tr>
<th>Data Collection Instrument</th>
<th>Baseline</th>
<th>3 Months</th>
<th>6 Months</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eligibility Questionnaire (survey)</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Pediatric Asthma Caregiver's Quality of Life Questionnaire (survey)</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Figure 48: Click the gray status icon beside the first data collection instrument to begin editing the record.

Eligibility Questionnaire

Adding new Record ID 3

Event Name: Baseline

<table>
<thead>
<tr>
<th>Record ID</th>
<th>3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Child's First Name</td>
<td>John</td>
</tr>
<tr>
<td>Child's Last Name</td>
<td>Smith</td>
</tr>
<tr>
<td>Parent's Email</td>
<td><a href="mailto:test@test.com">test@test.com</a></td>
</tr>
</tbody>
</table>

Figure 49: Enter data into each form as if you were a study participant.

Alert

The value provided could not be validated because it does not follow the expected format. Please try again.

Required format: Date (M-D-Y)

Figure 50: An error alert will indicate when validation rules have been violated.
Figure 51: When you have tested all fields on a form, save and exit.

## Viewing a Record

Open an existing record. Then open an instance of a partial or complete response to view the data.

1. Click on **Add / Edit Records**.
2. Choose a record ID or search for a record by survey field.
3. Click a survey status icon to view the corresponding response data. The icon color indicates the survey status.

Figure 52: Choose a record ID or search for a record by survey field.
Figure 53: Click a survey status icon to view the corresponding response data. The icon color indicates the survey status.

Exporting Data

Export project data to a CSV file.

1. In the left menu under Applications, click Data Exports, Reports, and Stats.
2. Click Export Data.
3. Review the possible formats, de-identification options, and advanced data formatting options. Choose the “CSV/Microsoft Excel (raw data)” format. Then click Export Data.
Figure 54: In the left menu under Applications, click Data Exports, Reports, and Stats.

Data Exports, Reports, and Stats

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.

Figure 55: Click Export Data.
Figure 56: Review the possible formats, de-identification options, and advanced data formatting options. Choose the “CSV/Microsoft Excel (raw data)” format. Then click Export Data.


## Working With Surveys

In this section, you will define separate project events and associate data collection instruments with them. You will also create and share a survey based on one of your instruments.

### Longitudinal Data

Enable longitudinal data collection for this project.

1. In the left menu under Project Home and Design, click **Project Setup**.
2. Under Main project settings, beside “Use longitudinal data collection with defined events?”, click **Enable**.

![Figure 57: Under Main project settings, beside “Use longitudinal data collection with defined events?”, click Enable.](image)

Create three events. Call them “Baseline,” “3 Months,” and “6 Months.”

1. On the Project Setup tab, click **Define My Events**.
2. Enter each event’s name and click **Add new event**.

![Figure 58: On the Project Setup tab, click Define My Events.](image)
Designate instruments for each event as follows. To collect eligibility data once, link the Eligibility Questionnaire to the baseline event only. To collect quality-of-life data at each timepoint, link the Pediatric Asthma Caregiver’s Quality of Life Questionnaire to all three events.

1. On the Project Setup tab, click Designate Instruments for My Events.
2. Click Begin Editing. Check the appropriate boxes beside each data collection instrument. Then click Save.

<table>
<thead>
<tr>
<th>Event #</th>
<th>Event Name</th>
<th>Custom Event Label (optional)</th>
<th>Unique event name (auto-generated)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Baseline</td>
<td></td>
<td>baseline_arm_1</td>
</tr>
<tr>
<td>2</td>
<td>3 Months</td>
<td></td>
<td>3_months_arm_1</td>
</tr>
<tr>
<td>3</td>
<td>6 Months</td>
<td></td>
<td>6_months_arm_1</td>
</tr>
</tbody>
</table>

**Figure 59:** Enter each event’s name and click Add new event.

**Figure 60:** On the Project Setup tab, click Designate Instruments for My Events.
Since you have defined multiple events on the Define My Events page, you may now select which data collection instruments that you wish to utilize for each event by using the table below. This allows you to enter data on any data collection form multiple times for any given project record. Any and all data collection instruments can thus be used for any event defined.

Click the Begin Editing button to change the relationships below by designating which forms you wish to utilize for which events. When you are finished making changes, click the Save button to finalize your changes.

Add a new record and observe the changes to the instrument structure.

1. Click on Add / Edit Records.
2. Click \+ Add new record.
3. Notice how the instrument structure now allows longitudinal data collection.

## Record Home Page

Record “3” is a new Record ID. To create the record and begin entering data for it, click any gray status icon below.

The grid below displays the form-by-form progress of data entered for the currently selected record. You may click on the colored status icons to access that form/event. If you wish, you may modify the events below by navigating to the Define My Events page.

### NEW Record ID 3

Data Collection Instrument | Baseline | 3 Months | 6 Months
--- | --- | --- | ---
Eligibility Questionnaire (survey) | | | |
Pediatric Asthma Caregiver’s Quality of Life Questionnaire (survey) | | | |

Figure 62: Notice how the instrument structure now allows longitudinal data collection.

## Surveys

Enable surveys in this project.

1. In the left menu under Project Home and Design, click Project Setup.
2. Click **Enable** beside “Use survey in this project?”

![Main project settings](image)

*Figure 63: Click **Enable** beside “Use survey in this project?”*

Enable the **Pediatric Asthma Caregiver’s Quality of Life Questionnaire** as a survey. Allow users to save their progress and return later.

1. Click **Designer** in the left menu under Project Home and Design.
2. Beside the second instrument, click **Enable**. A Set Up My Survey tab will open.
3. In the Survey Access section of the setup page, select **Yes** beside “Allow ‘Save & Return Later’ option for respondents?”

![Data Collection Instruments](image)

*Figure 64: Beside the second instrument, click **Enable**. A Set Up My Survey tab will open.*
Open an existing record and view the second instrument as a survey.

1. Click on Add / Edit Records.
2. Choose a record ID or search for a record by survey field.
3. Click a survey status icon to view the corresponding response data. The icon color indicates the survey status.

**Pediatric Asthma Caregiver’s Quality of Life Questionnaire**

During the past week, how often did you feel helpless or frightened when your child experienced cough, wheeze, or breathlessness?

Using a personal email address, invite yourself to complete the survey via the Survey Distribution Tool. Follow the email link to complete the survey.
1. In the left menu under Data Collection, click on Survey Distribution Tools.
2. On the Participant List tab, click Add participants.
3. Enter one or more email addresses and click Add participants.
4. At the top of the Participant List, click Compose Survey Invitations.
5. Edit the text in the Compose box and review the message settings. Make sure your personal email is selected in the Participant List. Click Send Invitations.

![Survey Distribution Tools](image1)

**Figure 67:** In the left menu under Data Collection, click on Survey Distribution Tools.

![Survey Distribution Tools](image2)

**Figure 68:** On the Participant List tab, click **Add participants**.
Add Emails to Participant List

Copy and paste your list of participant email addresses, one per line.

Example #1: john.williams@hotmail.com
Example #2: jmtaylor@yahoo.com
Example #3: putnamtr@gmail.com

Each participant starting on a new line

Figure 69: Enter one or more email addresses and click Add participants.

Survey Distribution Tools

The Participant List option allows you to send a customized email to anyone in your list and track who responds to your survey. It is also possible to identify an individual's survey answers, if desired, by providing an identifier for each participant (this feature must first be enabled by clicking the ‘Enable’ button in the table below). Note: All survey responses collected are considered anonymous unless you 1) are using Participant Identifiers or 2) have enabled the designated email field for invitations. More details

Participant List belonging to [Initial survey] "Eligibility Questionnaire" - Baseline

Displaying 1 to 2 of 2

Add participants Compose Survey Invitations

Figure 70: At the top of the Participant List, click Compose Survey Invitations.
Figure 71: Edit the text in the Compose box and review the message settings. Make sure your personal email is selected in the Participant List. Click **Send Invitations**.

Check the response status of invited participants.

1. In the left menu under Data Collection, click on **Survey Distribution Tools**.
2. View each participant’s status on the Participant List tab.

**Survey Distribution Tools**

The Participant List option allows you to **send a customized email** to anyone in your list and **track who responds to your survey**. It is also possible to identify an individual’s survey answers, if desired, by providing an identifier for each participant (this feature must first be enabled by clicking the ‘Enable’ button in the table below). Note: All survey responses collected are considered anonymous unless you 1) are using Participant Identifiers or 2) have enabled the designated email field for invitations. [More details](#)

Figure 72: View each participant’s status on the Participant List tab.

**Note About Public Surveys**

REDCap allows use of a public survey URL when a project’s first instrument is set up as a survey. In that case, you can also create a shorter, more memorable version of the URL by clicking **Create Custom Survey Link**.
For this exercise, you cannot use a public URL because the first instrument is not set up as survey.

**Survey Distribution Tools**

Using a public survey link is the simplest and fastest way to collect responses for your survey. You may obtain the survey link below to email it to your participants. Responses will be collected anonymously (unless the survey contains questions asking for identifying data from the participant). **NOTE:** Since this method uses a single survey link for all participants, it allows for the possibility of participants taking the survey multiple times, which may be necessary in some cases.

To obtain the survey link, copy the URL below and paste it into the body of an email message in your own email client. Your email recipient(s) can then click the link to begin taking your survey.

**Public Survey URL:** https://www.redcap.ihrp.uic.edu/surveys/?s=EADTXXEL7T

**Figure 73:** Create a shorter survey link by clicking *Create Custom Survey Link*.
Production Mode

After project instruments have been created and tested, the project should be moved to production mode. Once a project is in production, a REDCap administrator will need to approve any further edits. This process can take up to two business days.

If changes do not cause any critical issues for existing data, they should be approved automatically. You will receive an email notification when changes have been approved.

Other changes, like changing field options or deleting a field, may cause critical issues for existing data. This kind of change will not be approved automatically while in production mode. Instead, a REDCap administrator will contact you via email to confirm the revision.

In this section, you will move your project to production mode, make draft changes, and request approval from the REDCap administrator.

Moving to Production Mode

Initiate the move to production mode. Keep all records submitted while in development status and confirm the change.

1. In the left menu under Project Home and Design, click Project Setup.
2. At the bottom of the page, click Move project to production.
3. Read the notice and click I Agree.
4. Select Keep ALL data saved so far. Click YES, Move to Production Status.

![Move your project to production status](image)

Figure 74: At the bottom of the page, click Move project to production.
10. If using scheduling in REDCap, make sure to define scheduling prototypes.

11. Test that any other functionality expected works correctly.

If changes are needed to a database in production, you will have to place it in "draft" to make changes, which will then have to be approved by REDCap administrators. Such requests may require a 24 hour approval period during regular university workdays.

Figure 75: Read the notice and click I Agree.

![Alert](image)

**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. If you select the 'Delete ALL data' option 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?

**Keep existing data or delete?**

- Keep ALL data saved so far. (2 records)
- Delete ALL data, calendar events, documents uploaded for records/responses, survey responses (if applicable), and any logging events pertaining to data collection.

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.

Figure 76: Select Keep ALL data saved so far. Click YES, Move to Production Status.

**Working in Production Mode**

Enter draft mode.

1. Click Online Designer.
2. Read the notice and then click Enter Draft Mode.
Add a field to a data collection instrument. Submit the changes for review by a REDCap administrator.

1. To open the instrument for editing, click its name.
2. Add a field by clicking Add Field in the desired location.
3. Select a field type from the dropdown menu. Review and set each field attribute. Then click Save.
4. Click Submit Changes for Review.

Delete a field from one of the forms. View the draft changes without submitting.

1. To open the instrument for editing, click its name.
2. Delete a field by clicking the red X above the field name.
3. Click View detailed summary of all drafted changes.
4. Notice the potentially critical issues that will occur if this field is deleted.
5. Do not submit the change.
DELETE FIELD?

Are you sure you wish to delete the field "height"?

Delete  Cancel

Figure 80: Confirm by clicking Delete.

Since this project is currently in PRODUCTION, changes will not be made in real time.  

Submit Changes for Review  Fields to be added: 0  /  Total resulting field count: 8  
Remove all drafted changes  Fields to be deleted: 0  /  Existing field count: 8  

View detailed summary of all drafted changes

Figure 81: Click View detailed summary of all drafted changes.

Details regarding all changes made in Draft Mode:

- Records in project: 2
- Fields to be added: 1
- Fields to be modified: 0

- Total potentially critical issues: 1
  - Deleted fields that contain data: 1
  - Potentially critical issues in modified fields that contain data: 0

- Total field count BEFORE the changes below are committed: 8
- Total field count AFTER the changes below are committed: 8

Will these changes be automatically approved? No, an admin will have to review these changes. (Administrators: Change how this works)

Figure 82: Notice the potentially critical issues that will occur if this field is deleted.
Copying and Deleting Projects

In this section, you will explore some of REDCap’s Other Functionality options, including copying and deleting projects.

**Copying Projects**

Make a duplicate of the current project named "[your name]_Test [date]_v2."

1. In the left menu under Project Home and Design, click **Project Home**.
2. Click on the Other Functionality tab.
3. Click **Copy the project**.
4. Edit the project name. Review other options without making changes. Click **Copy Project**.

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**Figure 83:** In the left menu under Project Home and Design, click **Project Home**.

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**Figure 84:** Click on the Other Functionality tab.

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**Figure 85:** Click **Copy the project**.
Figure 86: Edit the project name. Review other options without making changes. Click Copy Project.

Note the structure and status of the duplicate project.

1. In the left menu under Project Home and Design, click Project Home.
2. Click on the Other Functionality tab.
3. The new project should be an exact copy of the original. However, the new project is still in development status, regardless of the status of the original.

Figure 87: The new project should be an exact copy of the original. However, the new project is still in development status, regardless of the status of the original.

**Deleting Projects**

Initiate deletion of the project.

1. In the left menu under Project Home and Design, click *Project Home*.
2. Click on the Other Functionality tab.
3. Click *Delete the project*.

**Project Management**

You may completely remove this project, in which all its data will be permanently deleted also.

You may erase all currently collected data in the project, which includes all calendar events, documents uploaded for records/responses, survey responses (if applicable), and any logging events pertaining to data collection.

You may archive the project if you do not wish to use it any longer. Archiving the project will take it offline and remove it from your list of projects. It can only be accessed again by clicking the *Show Archived Projects* link at the bottom of the *My Projects* page. You will be able to un-archive the project at any time and bring it back online simply by accessing it again and returning to this page.

Figure 88: Click *Delete the project*.

Confirm that you wish to delete all project data.

1. Type “DELETE” and click *Delete the project*.
2. To confirm and delete the project permanently, click *Yes, delete the project*. 
Deleting the project named "Rachel_Test_20191029".

If you wish to permanently delete this REDCap project, type the word "DELETE" in the box below and click the button. Please ensure that this is truly what you wish to do before continuing here.

**TYPE "DELETE" BELOW**

DELETE

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Figure 89: Type “DELETE” and click Delete the project.

**CONFIRM DELETION**

Are you really sure you wish to delete this project?

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Figure 90: To confirm and delete the project permanently, click Yes, delete the project.