

Navigation Sheet – Basic Project set-up and management

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This is a short guide to explain the basic set-up and management of a REDCap project.

Create a new project

Only users with KI-ID can create projects in REDCap. To create a new project, click on the New Project button on the top of the start page.

The screenshot shows the 'Create a new REDCap Project' form. The top navigation bar includes 'Home', 'My Projects', '+ New Project' (highlighted), 'Help & FAQ', 'Training Videos', 'Send-It', and 'Messenger'. The form contains the following fields:

- Project title:** A text input field.
- Project's purpose:** A dropdown menu with '---- Select One ----'.
- Project notes (optional):** A text area with a small icon for help.
- Project creation option:** Three radio buttons:
 - Empty project (blank slate)
 - Upload a REDCap project XML file (CDISC ODM format) ?
 - Use a template (choose one below)

Below the radio buttons is a section titled 'Choose a project template' with a table:

select template	Template title (sorted by title)	Template description
<input 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"/>	Field Embedding Example Project	Example of the Field Embedding feature.
<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.

At the bottom of the form are 'Send Request' and 'Cancel' buttons.

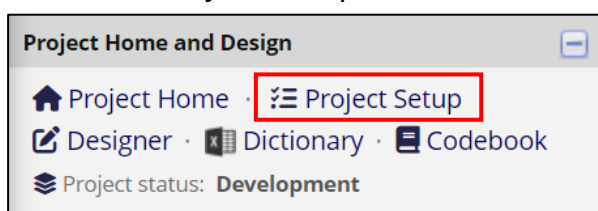
You should enter a Project Name, choose Project Purpose and select a Project creation option before submitting the request for a new project.

- If you choose an **Empty Project**, you will have the flexibility to tailor the project in a way that suits your study best. It can, however, be quite time-consuming filling in everything from a blank slate.
- If you have a previous REDCap project downloaded on your computer, you can choose to use this as a template for your new project by **uploading the project XML file** and re-use your previous settings.
- The last option is to use one of the pre-made **templates from the system** if there is one that fits your study design or if you just want some tips on how to build a project similar to yours.

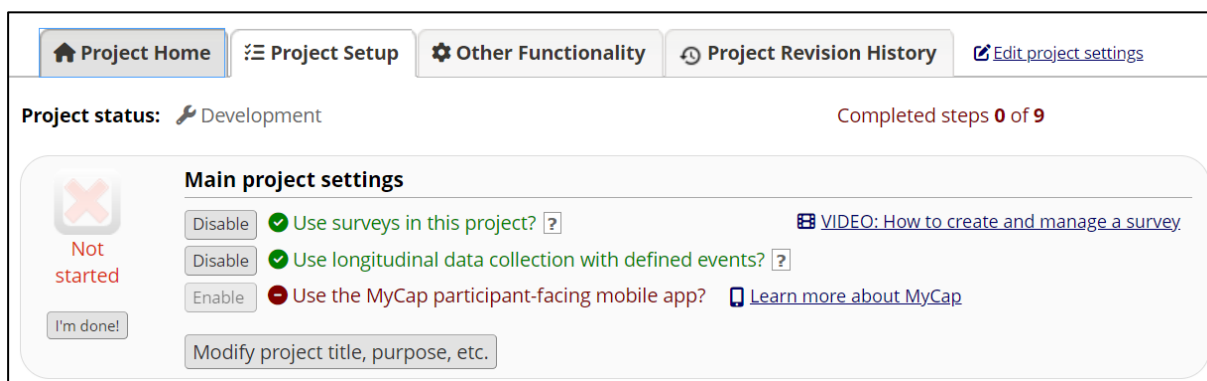
Your project request needs to be approved by your REDCap administrator before you can start working on it. This is normally done the same day, provided your request is submitted within standard office hours.

Project setup


Once your project has been approved, you can choose the project settings under the Project Setup tab on the left-hand side.



Here you can enable the Survey function if you plan to send out online surveys to your study participants. You can also enable longitudinal data collection and modify the project title.



You will have further options of enabling various modules and functions for your project.



Optional

I'm done!

Enable optional modules and customizations

Modify
✔ Repeating instruments and events [?](#)

Disable
✔ Auto-numbering for records [?](#)

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

Disable
✔ Randomization module [?](#)

Disable
✔ Designate an email field for communications (including survey invitations and alerts) [?](#)

Field currently designated: **epost** ("E-post")

Additional customizations

Settings displayed to Administrators only:

Enable
❌ Twilio SMS and Voice Call services for surveys and alerts [?](#)

Enable
❌ SendGrid Template email services for Alerts & Notifications [?](#)

[Learn about Data Collection Strategies for Repeating Surveys](#)

Online designer


You can navigate to the Online designer tab either from the menu on the left-hand side or from the Project setup tab.

Project Home and Design [-]

[Project Home](#) ·
 [Project Setup](#) ·

[Designer](#)
 ·
 [Dictionary](#) ·
 [Codebook](#)

Project status: **Development**




Not started

I'm done!


Design your data collection instruments & enable your surveys

Add or edit fields on your data collection instruments (survey and forms). This may be done by either using the Online Designer (online method) or by uploading a Data Dictionary (offline method). You may then enable your instruments to be used as surveys in the Online Designer. Quick links: [Download PDF of all instruments](#) OR [Download the current Data Dictionary](#)


Go to

 Online Designer

or

 Data Dictionary

Explore the

 REDCap Instrument Library

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

Learn how to use [Smart Variables](#)
[Piping](#)
[@ Action Tags](#)
[Field Embedding](#)
[Special Functions](#)

Here is where you will create your forms/surveys. In REDCap they are called Instruments. You can Create new instruments, Import instruments from the REDCap Library or Upload instrument Zip files from your other REDCap projects.

If you enabled the survey function under Project Setup, you also need to enable each instrument that should be used as a survey. If you keep instruments disabled, you can still use these instruments as forms, where study staff can enter information when logged in to the system.

Data Collection Instruments

[+ Create](#) | a new instrument from scratch

[Import](#) | a new instrument from the official [REDCap Instrument Library](#)

[Upload](#) | instrument ZIP file from another project/user or [external libraries](#)

Form options: [Form Display Logic](#)

Survey options: [Survey Queue](#) [Auto Invitation options](#) [Survey Login](#)
[Survey Notifications](#)

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey related options
Baseline	9			Choose action ▾	Survey settings + Automated Invitations
Familj	3			Choose action ▾	Survey settings + Automated Invitations
Random	1			Choose action ▾	
Hälsodata	5			Choose action ▾	Survey settings Automated Invitations
Uppföljning	1			Choose action ▾	Survey settings Automated Invitations
Avslut	1			Choose action ▾	Survey settings + Automated Invitations
Test	10			Choose action ▾	Survey settings + Automated Invitations
Hälsodata Kopia	2			Choose action ▾	Survey settings + Automated Invitations

Survey Distribution Tools

If you are using the survey function in your project, you can find different ways of distributing your surveys via the Survey Distribution Tools tab on the left-side menu.

Data Collection -

Survey Distribution Tools
- Get a public survey link or build a participant list for inviting respondents

Scheduling
- Generate schedules for the calendar using your defined events

Record Status Dashboard
- View data collection status of all records

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

You can choose to use a public survey link or to create your own participant list.

Record Status Dashboard

Under Record Status Dashboard you can get an overview of all collected data and view results from each participant.

Data Collection -

Survey Distribution Tools
- Get a public survey link or build a participant list for inviting respondents

Scheduling
- Generate schedules for the calendar using your defined events

Record Status Dashboard
- View data collection status of all records

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

Record ID	Besök 1, baseline			Besök 2, 3 månader			Besök 3, 6 månader		Besök 4, 9 mån			Besök 5, avslut
	Baseline	Familj	Random	Hälsodata	Uppföljning	Test	Hälsodata	Uppföljning	Hälsodata	Uppföljning	Hälsodata Kopia	Avslut
1_1												
10												
11												
12												
13												
14												
15												
16												
17												
18												

The results are color coded based on the status of the results.

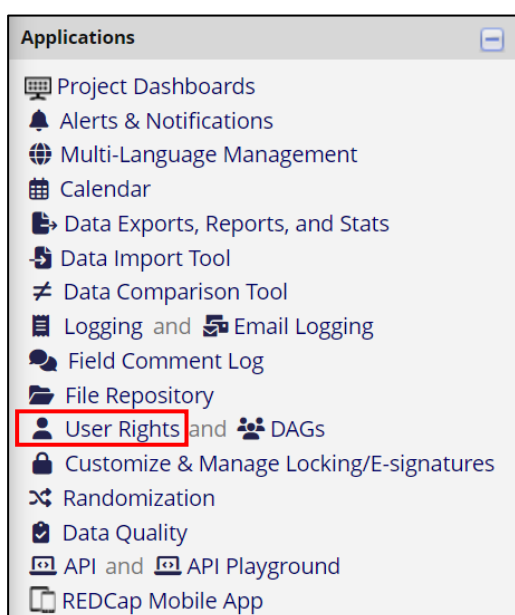
Legend for status icons:

Incomplete	Incomplete (no data saved) ?
Unverified	Partial Survey Response
Complete	Completed Survey Response
Many statuses (mixed)	Many statuses (all same)

User Rights

Under User Rights in the left-hand menu, you can add other REDCap users to your project and choose specific access levels for each user.

Please note that when adding external users (users outside of KI) to a project containing personal data, you need to make sure you have relevant collaboration and data agreements in place before you start sharing any data. For more info, please visit <https://staff.ki.se/process-for-drawing-up-agreements-for-the-transfer-of-personal-data>.



To add a person to your project, type in the person's name in the textbox and choose the correct user in the appearing drop-down list. You can also create roles, such as "Data Collector", to which you can add several users needing the same user rights.

Please note that adding an email address will not provide a person access to your project, you need to add their REDCap username.

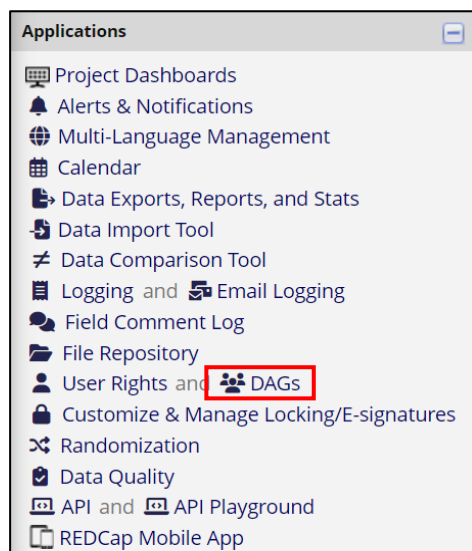
Add new users: Give them custom user rights or assign them to a role.

— OR —

Create new roles: Add new user roles to which users may be assigned.

(e.g., Project Manager, Data Entry Person)

You can also create Data Access Groups (DAGs) which can be useful when working with a multicenter study. You can then create one DAG for each study site and then the members of that DAG will only be able to access the data linked to their own DAG.



Export data

There are several ways of exporting data from your REDCap project.

1. Via the tab Other Functionality you can export your entire project as an XML file. You can choose to only export the metadata, or metadata + data. In this tab you can also copy or delete your project.

The screenshot shows the 'Other Functionality' tab in REDCap. It features a navigation bar with 'Project Home', 'Project Setup', 'Other Functionality' (highlighted), and 'Project Revision History'. The main content is divided into three sections:

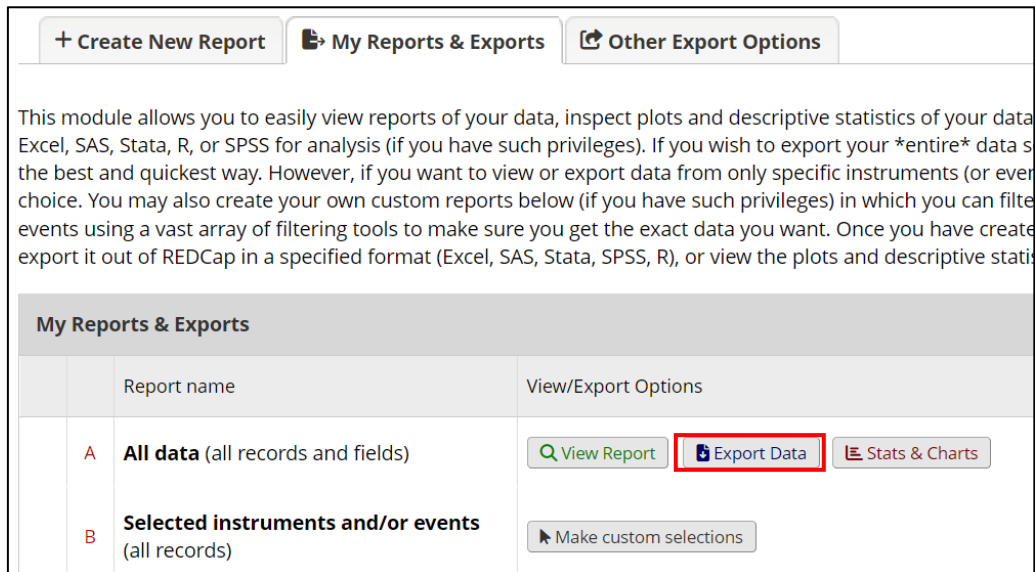
- Project Status Management:** A flow diagram showing 'Development (current)' leading to 'Production' and then to 'Analysis/Cleanup'. Below the diagram is a button 'Mark project as Completed' and a text block explaining that marking a project as completed makes it inaccessible and removes it from the project list.
- Data Management:** Contains two buttons: 'Delete the project' (with a red 'X' icon) and 'Erase all data' (with a red 'X' icon). Text explains that deleting the project permanently removes all data, and erasing all data removes current data, calendar events, and archived files.
- Copy or Back Up the Project:** Contains a 'Copy the Project' button and two download options: 'Download metadata only (XML)' and 'Download metadata & data (XML)'. The latter is highlighted with a red box. Text explains that this option creates a duplicate of the project and that the XML file can be used to clone the project or import it into another system.

At the bottom of the 'Download metadata & data (XML)' section, there is a red box containing the text: 'Include the following in the XML file:'.

2. If you are only interested in exporting the collected data, this is done via the Data Exports, Reports and Stats tab on the left-hand menu.

The screenshot shows the 'Applications' menu in REDCap. The menu items are listed vertically, and 'Data Exports, Reports, and Stats' is highlighted with a red box. Other items include Project Dashboards, Alerts & Notifications, Multi-Language Management, Calendar, Data Import Tool, Data Comparison Tool, Logging and Email Logging, Field Comment Log, File Repository, User Rights and DAGs, Customize & Manage Locking/E-signatures, Randomization, Data Quality, API and API Playground, and REDCap Mobile App.

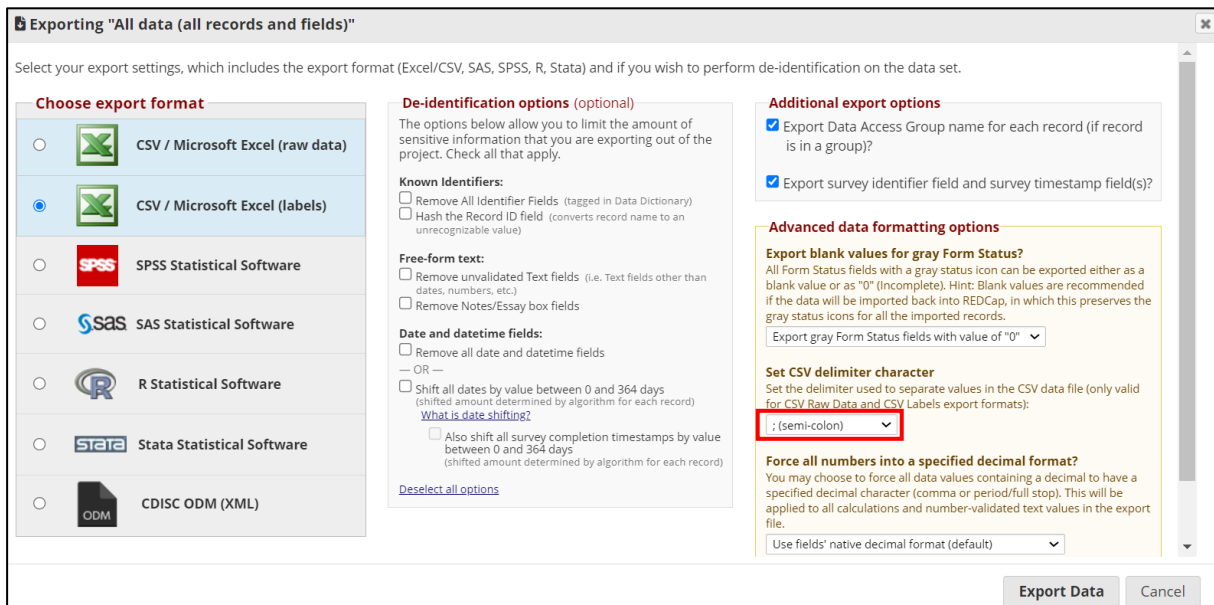
You can export all data, data from specific instruments or create your own reports and export.



This module allows you to easily view reports of your data, inspect plots and descriptive statistics of your data Excel, SAS, Stata, R, or SPSS for analysis (if you have such privileges). If you wish to export your *entire* data set the best and quickest way. However, if you want to view or export data from only specific instruments (or even choice). You may also create your own custom reports below (if you have such privileges) in which you can filter events using a vast array of filtering tools to make sure you get the exact data you want. Once you have created export it out of REDCap in a specified format (Excel, SAS, Stata, SPSS, R), or view the plots and descriptive statistics.

My Reports & Exports		View/Export Options
A	All data (all records and fields)	<input type="button" value="View Report"/> <input style="border: 2px solid red;" type="button" value="Export Data"/> <input type="button" value="Stats & Charts"/>
B	Selected instruments and/or events (all records)	<input type="button" value="Make custom selections"/>

When you click on Export Data, a new window will appear where you can choose which format you wish to use. When exporting data to an excel CSV file on a Swedish computer, remember to use semi-colon as the delimiter character in order to view your data in the correct format.



Exporting "All data (all records and fields)"

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 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](#)

Additional export options

- Export Data Access Group name for each record (if record is in a group)?
- Export survey identifier field and survey timestamp field(s)?

Advanced data formatting options

Export blank values for gray Form Status?

All Form Status fields with a gray status icon can be exported either as a blank value or as "0" (Incomplete). Hint: Blank values are recommended if the data will be imported back into REDCap, in which this preserves the gray status icons for all the imported records.

Export gray Form Status fields with value of "0"

Set CSV delimiter character

Set the delimiter used to separate values in the CSV data file (only valid for CSV Raw Data and CSV Labels export formats):

Force all numbers into a specified decimal format?

You may choose to force all data values containing a decimal to have a specified decimal character (comma or period/full stop). This will be applied to all calculations and number-validated text values in the export file.

Use fields' native decimal format (default)