RC201
Creating Data Forms in REDCap
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Collaborative Data Services (CDS)
Agenda

- Quick Tour around REDCap
- Using the Online Designer to create/edit forms
- Using the Data Dictionary to create/edit forms
- Creating a Codebook & PDFs of forms
- Development vs Production
Quick Tour around REDCap
Fred Hutch REDCap News (No need to login to access any of these links!)

- REDCap is now at version 8.5.1. View REDCap versions and the features added to each release.
- CDS provides extensive (and free) REDCap Training, both in-person and video-based training.
- MyCap may just revolutionize the collection of data from participants on mobile devices. Watch the MyCap video.
- If you want to create a new REDCap project, please complete this short New Project Request survey.
- Additional Information on the Fred Hutch REDCap instance, including security and IRB considerations.

Listed below are the REDCap projects to which you currently have access. Click the project title to open the project. Read more

**ATTENTION REQUESTED:** You have not accessed the User Access Dashboard yet. It is recommended that you access the User Access Dashboard at least once each calendar month to review which users still have access to your projects.

<table>
<thead>
<tr>
<th>Project Title</th>
<th>Records</th>
<th>Fields</th>
<th>Instrument</th>
<th>Type</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Paul Demo Project July 2018</td>
<td>6</td>
<td>43</td>
<td>9 forms</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Paul Brand New Project</td>
<td>0</td>
<td>2</td>
<td>1 form</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Access to most parts of REDCap including other pages (My Projects, Project Home, etc.), Data collection, Other stuff (Applications), Reports, Help.
Brief project overview including users and general usage statistics.
Access to online designer, data dictionary, main project settings, optional modules and customizations, user rights, etc.
When you click on subject id, you will move to a focused view of a single record and access to "actions for record"
Overview of all your records; access to custom dashboards.
Add/Edit Records

Paul Demo Project July 2018

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.

- Total records: 6

Choose an existing Subject ID
-- select record --

Add new record

Data Search
Choose a field to search
(excludes multiple choice fields)

- All fields

Search query
Begin typing to search the project data; then click an item in the list to navigate to that record.

Allows you to...
1. Select a record by subject id.
2. Add a new record.
3. Search for a record by any field in project.
Using the Online Designer to create/edit forms
Creating a data form using the designer

- Starting the designer
  - Click **Designer** link under Project Home and Design on left-hand navigation bar
  - Click **Online Designer** button under Design your data collection instruments & enable your surveys under Project Setup tab
Initial Project

- For new projects using the Fred Hutch template, you will start with a single data collection instrument, **Sample Instrument**

- Do **not** delete this instrument; rename it instead
Your first form

- It will always have the `record_id (subject_id)` field.
- Don't delete this field; it is the primary key of your project.
- You may, however, rename it.
Creating a data form using the designer

- Starting the designer
  - Click **Designer** link under Project Home and Design on left-hand navigation bar
  - Click **Online Designer** button under Design your data collection instruments & enable your surveys under Project Setup tab
Editing a field

- Clicking the pencil icon next to a field, brings you to the **Edit Field** dialog

- This dialog will vary depending on the **Field Type** selected
Adding a field

- Clicking the Add Field button, brings you to the Add New Field dialog.
- This dialog will again vary depending on the Field Type selected.
Field Types

• **Standard fields**
  • **Text Box**
    • REDCap supports autocomplete based on biomedical ontologies (e.g., ICD-10 codes).
  • **Notes Box** – paragraph of text
  • **Calculated Field** – numeric calculation
  • **Multiple Choice – Drop-down List** (Single Answer)
  • **Multiple Choice – Radio buttons** (Single Answer)
  • **Checkboxes** (Multiple Answers)
  • **Yes – No** – yes/no radio button
  • **True – False** – true/false radio button
  • **Signature** – draw signature with mouse or finger
  • **File Upload** – attach documents to form
  • **Slider / Visual Analog Scale** – slider from 1 to 100
  • **Descriptive Text** – does not capture data
  • **Begin New Section** – also does not capture data
  • **Dynamic Query** (SQL) – dropdown hooked up to another project. Requires admin to setup

• **Matrix fields**
  • Adds a group of radio button or checkbox fields sharing same set of responses
Field Properties

- **Field Type** – type of field
- **Field Label** – the prompt the user sees
- **Variable Name** – the field name used at export and when branching and piping; *must be unique across entire project*
- **Validation** – simple validation
- **Required** – is field mandatory in order to save record?
- **Identifier** – does this contain PII?
- **Custom Alignment** – positions field (answers) on page
- **Field Note** – help text displayed underneath field in smaller font
- **Field Annotation** – note to designer or way to designate special field status; not displayed to data entry user
Required fields, identifier, & validation

- **Required**
  - Any field can be marked as required
  - Can be over-ruled by user at data entry time

- **Identifier**
  - Any field can be marked as Identifier
  - Will be stripped from exports (unless user has see “full data set” right)

- **Validation**
  - Only for textbox fields
  - Constrain user to entering valid date, integer, number, email address, phone number, zipcode, etc.
  - You can also specify min and max values for numeric/date types; but boundaries can be overridden at data entry time
Calculations

- **Numeric calculations**
  - **No text or date calculations!**
  - Possible workarounds: use branching logic to display alternate text messages; use Data Entry Triggers (a programming extension) for date calculations

- Reference field names using \[field\_name\] syntax

- Can reference fields on other forms!
  - When using longitudinal project (discussed in 301 seminar), you need to modify this syntax if field is from a different event

- REDCap has a number of numeric, datetime, and boolean functions to support calculations (and branching, reports, and DQRs)
Copy value of field from another data form

[bas_height]
BMI Calculation (lbs/inches)

- Without rounding

\[
\left(\frac{\text{bas_weight}}{(\text{bas_height} \times \text{bas_height})}\right) \times 703
\]

- With rounding

\[
\text{round}\left(\left(\frac{\text{bas_weight}}{(\text{bas_height} \times \text{bas_height})}\right) \times 703, 1\right)
\]

Example from **Baseline Interview in Training -- Classic Project**
## Action Tags

- Originally added to REDCap in version 6.7
  - Goes in Field Annotation property of field
  - More added every so often

### All available action tags and their descriptions:

<table>
<thead>
<tr>
<th>Action</th>
<th>Tag</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add</td>
<td>@HIDDEN</td>
<td>Hides the field on both the survey page and the data entry form. Field will stay hidden even if branching logic attempts to make it visible.</td>
</tr>
<tr>
<td>Add</td>
<td>@HIDDEN-FORM</td>
<td>Hides the field only on the data entry form (i.e., not on the survey page). Field will stay hidden even if branching logic attempts to make it visible.</td>
</tr>
<tr>
<td>Add</td>
<td>@HIDDEN-SURVEY</td>
<td>Hides the field only on the survey page (i.e., not on the data entry form). Field will stay hidden even if branching logic attempts to make it visible.</td>
</tr>
<tr>
<td>Add</td>
<td>@READONLY</td>
<td>Makes the field read-only (i.e., disabled) on both the survey page and the data entry form so that its value cannot be changed.</td>
</tr>
<tr>
<td>Add</td>
<td>@READONLY-FORM</td>
<td>Makes the field read-only (i.e., disabled) only on the data entry form (i.e., not on the survey page) so that its value cannot be changed.</td>
</tr>
<tr>
<td>Add</td>
<td>@READONLY-SURVEY</td>
<td>Makes the field read-only (i.e., disabled) only on the survey page (i.e., not on the data entry form) so that its value cannot be changed.</td>
</tr>
</tbody>
</table>
Action Tags

- Version 7.6 added a bunch of useful action tags, including
  - @HIDEBUTTON – use to hide today/now button for a date/time field
  - @HIDECHOICE – use to retire one or more choices for a multiple-choice field (radio, drop-down, checkbox)
  - @MAXCHECKED – specify max no. of checkboxes that can be checked
  - @MAXCHOICE – causes choice to be disabled after so many records have selected the choice
  - @NONEOFTHEABOVE – allows for a checkbox to designate one (or more than one) choice that is mutually exclusive of all other choices
  - @CHARLIMIT, @WORDLIMIT – for text & notes fields
  - @RANDOMORDER – randomizes order of choices
Branching (a.k.a. skip logic)

- You can use Drag-N-Drop or Advanced syntax
Branching

- Example: displaying or hiding pregnancy question

[Image of REDCap branching logic with example]

Choose method below for the following field: **enr_pregnant** - Have you ever been pregnant?

- Advanced Branching Logic Syntax
  - Show the field ONLY if...
  - Test logic with a record: -- select record --

- OR

- Drag-N-Drop Logic Builder
  - Displaying field choices for the following data collection instrument: Enrollment
  - Field choices from other fields (drag a choice below to box on right)
    - subject_id = (define criteria)
    - feeling = (define criteria)
    - enr_gender = Male (1)
    - enr_gender = Female (2)
    - enr_birth_date = (define criteria)
    - enr_age = (define criteria)

[Options to show the field only if...]

Drag and Drop

[Options to show the field only if ALL below are true OR ANY below are true]

[Options to save or cancel]
Branching logic examples

• Checking if a field is not null (i.e., answered)
  
  $[\text{bas}_\text{packs}] < '2' \text{ and } [\text{bas}_\text{packs}] <> ''$

• Checking if a field is null
  
  $[\text{enr}_\text{birth}_\text{date}] = ''$

• Referencing checkbox field
  
  $[\text{enr}_\text{race(6)}] = '1'$

For quotes, you can use either single ('') or double ('"'), but be consistent in same expression!

Examples from Enrollment and Baseline Interview in Training -- Classic Project
Matrix Fields

Edit Matrix of Fields

You may add or edit a matrix (i.e. grid) of project fields on this data collection instrument by completing the fields below. By providing all necessary info below and clicking Save, the new matrix of fields will be added to the form on this page. A Field Label and Variable Name must be provide for each field in the matrix, and you must also set the Choices (i.e. matrix column headers) and answer format (Single Answer vs. Multiple Answers) for the entire matrix. View a matrix example or Read more about matrix fields on the Help & FAQ.

Section Header Text (optional)
Please rate the following items with 1 to 5 scale

Matrix Rows
Each row represents a different field with its own label and variable name.

Field Label
Happiness
Sadness
Anger

Variable Name
happiness
sadness
anger

Enable auto naming of variable based upon its Field Label?

Matrix Column Choices
Choices (one choice per line)
1. very likely
2. likely
3. neither likely or unlikely
4. unlikely
5. very unlikely

Other Matrix Info
Answer Format:
Single Answer (Radio Buttons)

Ranking:
What is a ranked matrix of fields?

Allow only 1 choice to be selected per column (radio buttons only)

Matrix group name: ONLY letters, numbers, and underscores
stuff

Save Cancel
Copying fields & choices

- Copy field

- Copy choices
Piping

- Allows you to copy the value from one field into various other places on a form
  - Field Label
  - Field Note
  - Section Header
  - Matrix field column headers
  - Option labels for multiple choice fields (radio, drop-down, checkbox)
  - Slider field labels (i.e. text displayed above slider bar)
  - Custom record locking text (if defined, displayed at bottom of form)
  - Survey Instructions
  - Survey Completion Text
  - Survey invitation emails (sent via Participant List or Automated Invitations) - includes both subject and message
  - ...

- Simply use same syntax as when referring to fields in calculations and branching, i.e. [field_name]
Piping Example

- Designer
- Data entry time
Using the Data Dictionary to create/edit forms
Data Dictionary

- Everything discussed using Designer can also be done using the downloaded data dictionary

- You can develop projects using either...
  - Designer
  - Data Dictionary
  - or both!

- My style
  - I like to use Designer most of the time
  - But I use the Data Dictionary when I need to create similar fields multiple times on same form or on different forms or fix a bunch of fields because a change in field name used in branching logic in multiple places
Data 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 fieldforms built quickly or to make quick edits, but using the Data Dictionary file may be more helpful if you are 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: MM/DD/YYYY or YYYY-MM-DD

Choose File: No file chosen

Upload File
Data Dictionary

- Each column maps to a property in the designer

- Download and upload using CSV format
  - Not TSV!
  - Not Excel!

- **Note:** if you use non-English language characters in your field labels or choices, you will want to save using the "CSV UTF-8" format. Otherwise, non-English language characters will turn into funny ? characters
<table>
<thead>
<tr>
<th>Variable / Field Name</th>
<th>Form Name</th>
<th>Section</th>
<th>Field Type</th>
<th>Field Label</th>
<th>Choices, Calc Field Note</th>
<th>Text Validation Text Validation Text Validation</th>
</tr>
</thead>
<tbody>
<tr>
<td>record_id</td>
<td>demographics</td>
<td></td>
<td>text</td>
<td>Subject Id</td>
<td></td>
<td></td>
</tr>
<tr>
<td>dem_firstname</td>
<td>demographics</td>
<td></td>
<td>text</td>
<td>First Name</td>
<td></td>
<td></td>
</tr>
<tr>
<td>dem_lastname</td>
<td>demographics</td>
<td></td>
<td>text</td>
<td>Last name</td>
<td></td>
<td></td>
</tr>
<tr>
<td>dem_gender</td>
<td>demographics</td>
<td></td>
<td>radio</td>
<td>Gender</td>
<td>1, female</td>
<td>2, male</td>
</tr>
<tr>
<td>dem_dob</td>
<td>demographics</td>
<td></td>
<td>text</td>
<td>Birthdate</td>
<td>date_mdy</td>
<td>1/1/60</td>
</tr>
<tr>
<td>dem_thankyou</td>
<td>demographics</td>
<td></td>
<td>descriptive</td>
<td>Thank you, [dem_firstname], for your time in completing this form</td>
<td></td>
<td></td>
</tr>
<tr>
<td>happy1_align</td>
<td>alignment_demo</td>
<td></td>
<td>yesno</td>
<td>Are you happy?</td>
<td>RV</td>
<td></td>
</tr>
<tr>
<td>hungry_align</td>
<td>alignment_demo</td>
<td></td>
<td>yesno</td>
<td>Are you hungry?</td>
<td>RH</td>
<td></td>
</tr>
<tr>
<td>thirsty_align</td>
<td>alignment_demo</td>
<td></td>
<td>yesno</td>
<td>Are you thirsty?</td>
<td>LV</td>
<td></td>
</tr>
<tr>
<td>angry_align</td>
<td>alignment_demo</td>
<td></td>
<td>yesno</td>
<td>Are you angry?</td>
<td>LH</td>
<td></td>
</tr>
<tr>
<td>demo_firstname</td>
<td>validation_demo</td>
<td></td>
<td>text</td>
<td>First Name</td>
<td></td>
<td></td>
</tr>
<tr>
<td>demo_lastname</td>
<td>validation_demo</td>
<td></td>
<td>text</td>
<td>Last name</td>
<td></td>
<td></td>
</tr>
<tr>
<td>demo_gender</td>
<td>validation_demo</td>
<td></td>
<td>radio</td>
<td>Gender</td>
<td>1, female</td>
<td>2, male</td>
</tr>
<tr>
<td>birthdate_ba</td>
<td>validation_demo</td>
<td></td>
<td>radio</td>
<td>Birthdate (b/a)</td>
<td>date_mdy</td>
<td>1/1/60</td>
</tr>
<tr>
<td>dem_dob_v2</td>
<td>validation_demo</td>
<td></td>
<td>text</td>
<td>Birthdate (with validation)</td>
<td>date_mdy</td>
<td>1/1/60</td>
</tr>
<tr>
<td>age</td>
<td>validation_demo</td>
<td></td>
<td>text</td>
<td>Age</td>
<td>Enter an integer</td>
<td>18</td>
</tr>
<tr>
<td>email</td>
<td>validationDemo</td>
<td></td>
<td>text</td>
<td>Email</td>
<td></td>
<td></td>
</tr>
<tr>
<td>mobile_phone</td>
<td>validation_demo</td>
<td></td>
<td>text</td>
<td>Mobile phone</td>
<td>Enter a valid phone</td>
<td></td>
</tr>
<tr>
<td>bmi_weight</td>
<td>bmi</td>
<td></td>
<td>text</td>
<td>Weight (in pounds)</td>
<td>number</td>
<td>50</td>
</tr>
<tr>
<td>bmi_height</td>
<td>bmi</td>
<td></td>
<td>text</td>
<td>Height (in inches)</td>
<td>number</td>
<td>48</td>
</tr>
<tr>
<td>bmi_bmi</td>
<td>bmi</td>
<td></td>
<td>calc</td>
<td>BMI</td>
<td>(((bmi_weight)/((bmi_height)*[(bmi_height)])))*703</td>
<td></td>
</tr>
<tr>
<td>bmi_bmi2</td>
<td>bmi</td>
<td></td>
<td>calc</td>
<td>BMI</td>
<td>round(((bmi, With rounding to 1 decimal place)</td>
<td></td>
</tr>
<tr>
<td>bmi_bmi3</td>
<td>bmi</td>
<td></td>
<td>calc</td>
<td>BMI</td>
<td>round(((bmi, With rounding to 1 decimal place)</td>
<td></td>
</tr>
<tr>
<td>race</td>
<td>checkbox branching demo</td>
<td>checkbox</td>
<td>Race</td>
<td>White, White (A person having origins in any of the original people</td>
<td></td>
<td></td>
</tr>
<tr>
<td>race_other</td>
<td>checkbox branching demo</td>
<td>text</td>
<td>Other race</td>
<td></td>
<td></td>
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<tr>
<td>K</td>
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<tr>
<td>Identifier?</td>
<td>Branching Lo</td>
<td>Required Fie</td>
<td>Custom Align</td>
<td>Question Nu</td>
<td>Matrix Group</td>
<td>Matrix Ranki</td>
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<tr>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>RH</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>LH</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Notes of Europe, the Middle East or North Africa.* | Black, Black or African-American (A person having origins in any of the black | [race(other)] = '1' |
Data Dictionary

- **Uploading Changes**
  - REDCap will list out any errors and/or warnings before you can commit your changes
  - Don't forget to click **Commit Changes**
Creating Codebook & PDFs of forms
Codebook & PDFs

- **Codebook**

- **PDFs of forms** (with or without data)
  - Open form (in data collection mode)
Development vs. Production
Development & Production Modes

- Indicated in Navigation bar (and a few other places)

- You can do anything in Development mode
Development & Production Modes

- **Once in Production Mode**
  - Click on Online Designer from Project Setup tab

  ![Online Designer screenshot]

  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?

  - Changes will be held in draft mode and need to be **submitted & approved** before going live (production)
  - CDS approves all production changes (except for automatically approved ones!)
  - This is for your data safety!

This topic discussed in much greater detail in RC 302 class
Thank you!

redcap@fredhutch.org
Collaborative Data Services (CDS)