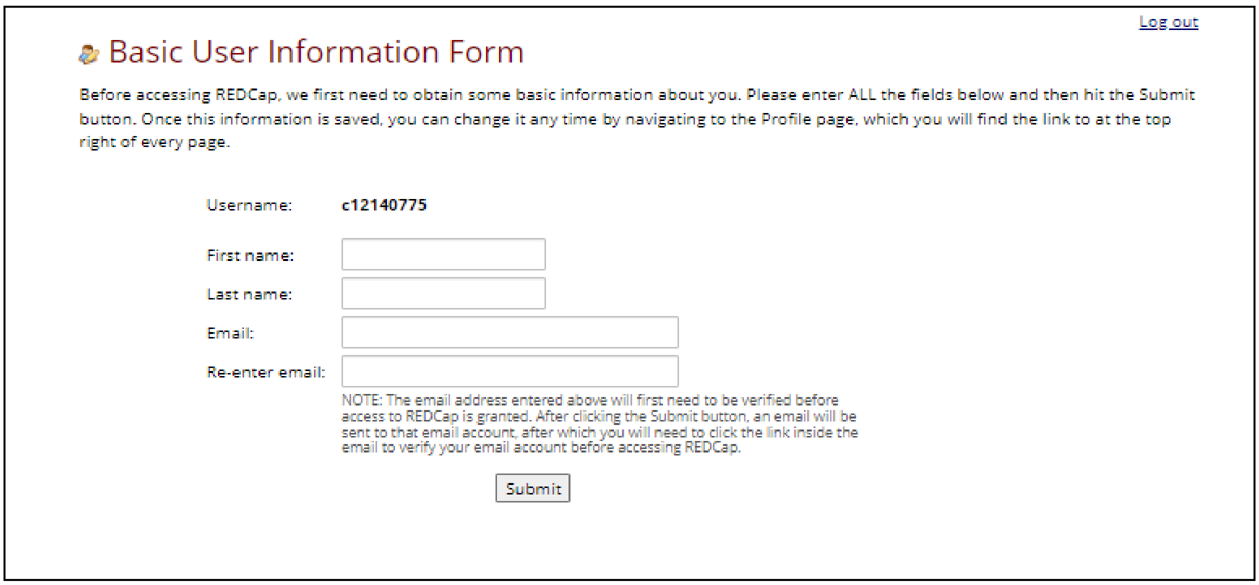
Frequently Asked Questions (FAQ) Library
11/25/2024, version 1

Contents

1. How do I access REDCap?

Anyone who needs access to REDCap must have an active CaneID, including UMiami personnel and external collaborators. To register for a CaneID please visit https://idm.miami.edu/caneid/registration?execution=e1s1. Once a CaneID is obtained, to access REDCap, please navigate to https://redcap.miami.edu, log in using your CaneID credentials, then complete and submit the presented form below. A REDCap account will be provisioned immediately.


Log out

Basic User Information Form

Before accessing REDCap, we first need to obtain some basic information about you. Please enter ALL the fields below and then hit the Submit button. Once this information is saved, you can change it any time by navigating to the Profile page, which you will find the link to at the top right of every page.

Username: c12140775

First name:

Last name:

Email:

Re-enter email:

NOTE: The email address entered above will first need to be verified before access to REDCap is granted. After clicking the Submit button, an email will be sent to that email account, after which you will need to click the link inside the email to verify your email account before accessing REDCap.

Submit

2. Where can I find REDCap tutorials?

REDCap has a few quick video tutorials available that will provide more details on the application. To view them, click on the "Training Videos" link near the top of the page, after logging into REDCap. If you don't see the link, navigate to here after logging in: https://redcap.miami.edu/index.php?action=training

As of 2024, the REDCap project is 15 years old and used by over 7000 institutions. There are many free and accessible resources online. Additionally, University of Miami hosts several trainings offered by the Biostatistics Collaboration and Consulting Core (BCCC) and the Biomedical Data Services at the Louis Calder Memorial Library.

Biomedical Data Services: https://sp.library.miami.edu/subjects/biomedicaldata#tab-8

BCCC: https://www.publichealth.med.miami.edu/divisions/biostatistics/biostatistics-core/index.html

Training videos from the University of Arizona: https://cb2.uahs.arizona.edu/services-tools/surveys-clinical-databases-redcap/redcap-video-tutorials

3. Additional REDCap support services teams and contact information:

- The Biostatistics Collaboration and Consulting Core (BCCC) offers REDCap support: https://www.publichealth.med.miami.edu/divisions/biostatistics/bccc/procedures-forms/index.html
  - BCCC also offers Introduction to REDCap trainings, including an on-demand video available here: https://umiami.mediaspace.kaltura.com/media/2023-01-18%20-%20Intro%20to%20REDCap%20-%20Mavis/1_5ljk39re
- The Behavioral & Community-Based Shared Resource (BCSR) offers support for the development and maintenance of new REDCap projects for study specific data collection and e-consenting: https://umiamihealth.org/sylvester-comprehensive-cancer-center/research/research-resources/shared-resources/behavioral-and-community-based-research-shared-resource/services
- The University of Miami Library offers routine REDCap trainings: https://www.library.miami.edu/calder/data-visualization-services-workshops.html
- Consultations with Thilani Samarakoon, PhD, Biomedical Data Librarian, can be requested via email (preferably) or online (https://www.library.miami.edu/data-services/consultations.html)

4. How to gain access to an existing project

To gain access to a project, please contact your project administrator/PI so that they can add you to the project. If you are the administrator seeking access and your project is not an e-Consent project associated to a research study with FDA oversight, please complete the User Matrix ServiceNow form which can be accessed by clicking here.

5. How to request Administrative rights to a project and when is it permitted?

Team members with a project administrative role have the ability to manage all aspects of a project including the addition and removal of team members. The only exception where Administrative rights are not permitted is for e-Consent projects associated to research studies with FDA oversight. The administration of the study team members for these projects is managed by the REDCap Administrator.

To request Administrative rights for non-FDA e-Consent projects or to request team members to be added or removed for FDA e-Consent projects, please submit the User Matrix ServiceNow Form. Click here to be taken to the form.

6. How to request a new project:

New project requests are initiated within the REDCap application by following the steps below:

- Log into REDCap at redcap.miami.edu.

- Click on the + New Project link (near the top of the site) for each project that you would like to request.

- Complete the form and when you click on the blue “Create Project” button, the Decision Tree Survey will display in a pop up window to complete additional information regarding your project.
- Complete the Decision Tree Survey and when you click Submit, a system generated email will be sent to the ServiceNow ticketing system, which will auto create a ServiceNow ticket for the fulfillment of your project request. All communications for your project request from the REDCap administrator will be performed via the auto generated ServiceNow ticket. You will receive an email with the ticket.

7. When am I required to complete a Decision Tree Survey (DTS)?

The Decision Treey Survey (DTS) is required for all projects. The DTS determines the eligibility of your project to be implemented in REDCap. This is a required step for your project to be eligible for REDCap, and all questions must be answered. Upon completing and submitting the DTS, an email is sent to the ServiceNow ticketing system and you will receive an autogenerated new project ticket for your submission. All communications regarding your project request will be via this ticket until fulfillment of you request is complete.

8. How to add, modify or delete a variable on an instrument?

- Navigate to My Projects to locate your project.
- Click the “Designer” link under the “Project Home and Setup” section.
- Click on the name of the instrument that you wish to modify.
- While in the instrument, follow the respective steps for the desired action.

To add a variable:

- Click on the “Add Field” button, just above or below the area/section that you’d like to insert the new variable/field:

To modify a variable:

- Click on the pencil icon for the field you wish to modify.

- Edit within the "Edit Field" pop up window.
- Click on the Save button on the bottom right to commit the changes.

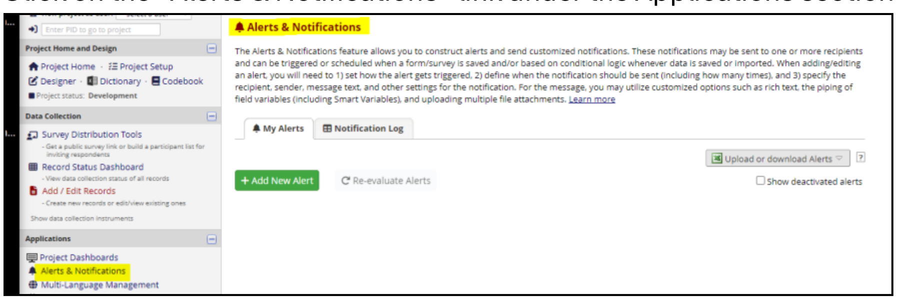
To delete a variable:

- Click on the red "x" corresponding to the item that you wish to remove:

- Click on the Delete button on the "Delete Field" button of the pop-up window to confirm.

9. How to create alerts and notifications for your project?

- Navigate to My Projects to locate your project in REDCap.
- Click on the "Alerts & Notifications" link under the Applications section on the left.



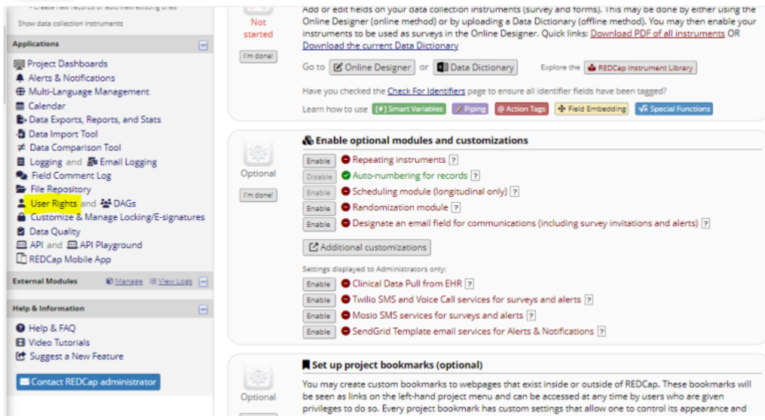
- Click on the green "Add New Alert" button on the right.
- Complete the Create New Aler form and click on the green "Save" button at the bottom to save / add the new alert.

10. How to add and remove team members on a project?

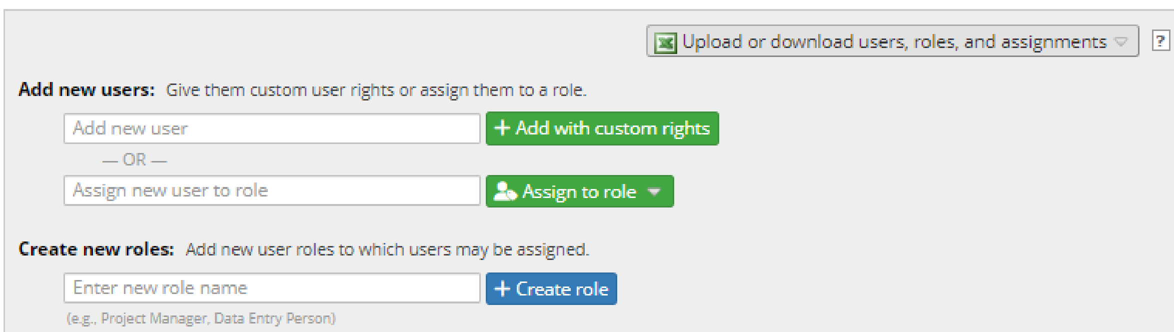
You must have Administrator rights to alter privileges for other users, i.e. edit team members on projects. As best practice, this access is usually granted via the role of PI or system administrator. There are exceptions to granting Administrator rights to a project. For more information on this please click here. To request Administrator rights you must complete and Submit the User Matrix ServiceNow form found here.

To add team members to project:

- Navigate to your project in REDCap.
- Click on the “User Rights” link under the Applications section on the left.



- The User Rights module will be shown on the right.



- Enter the c number of the person that you wish to add in the “Assign new user” text box.
- After entering the c number, click on the “Assign to role” button, select the role from the “—select role --" drop down list.
- Confirm the c number being added, the role to be assigned, then click on the Assign button.
- An alert will be shown confirming that the c number has been added to the project.

To remove team members from projects:

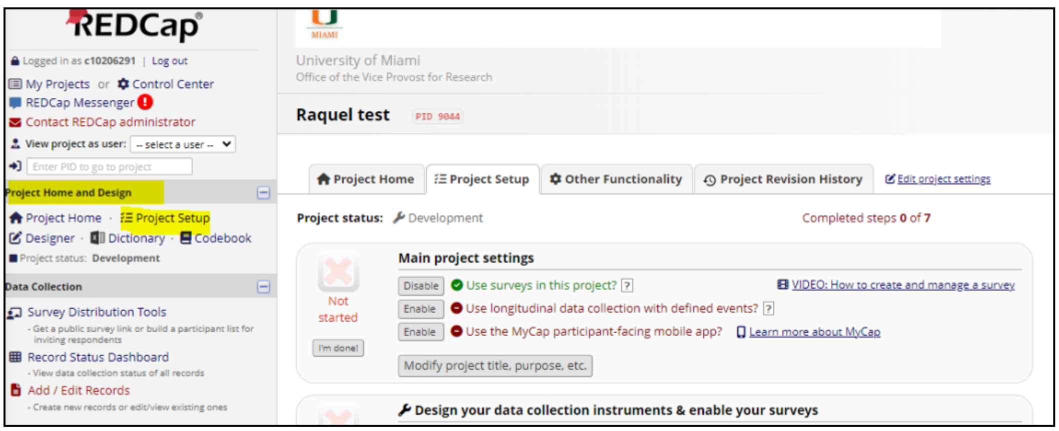
- While in the User Rights module, click on the team member’s name.
- Click on Edit user privileges.
- Click the Remove user button on the bottom right hand of the Editing existing user window.

11. When and how to move a project to production

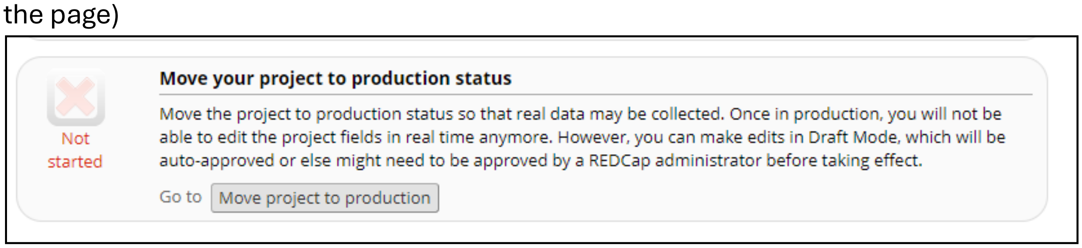
When to move a project to production: All REDCap projects begin in **Development** mode. After the project is developed and tested thoroughly, the project must be moved **to Production** mode before collecting "real" data. Prior to moving a project to Production, it is recommended that testing is completed by simulating data collection. Changes to a project in Production should be kept to a minimum or ideally to none. Once a project is moved to Production, changes to the project may cause accidental deletion of collected data; therefore, changes must be reviewed and committed by the REDCap Administration team, which may take several business days. See "Can I make changes to a project after moved to production?" for more information.

How to move a project to production:

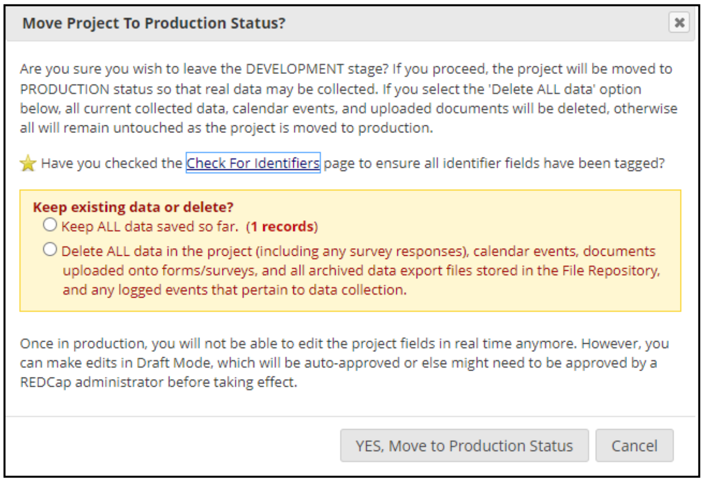
- Navigate to My Projects to locate your project in REDCap.
- Click on the "Project Setup" link under the "Project Home and Design" section on the left.



- Scroll to the "Move your project to production status" on the right (near the bottom of the page)



- Click on the 'Move project to production" button.
- Select whether you would like to keep or delete all of your data.



- Click on the "YES, Move to Production Status"

An email will be sent to the REDCap Administrative team who will work on your request and move your project to production or advise if anything further is needed.

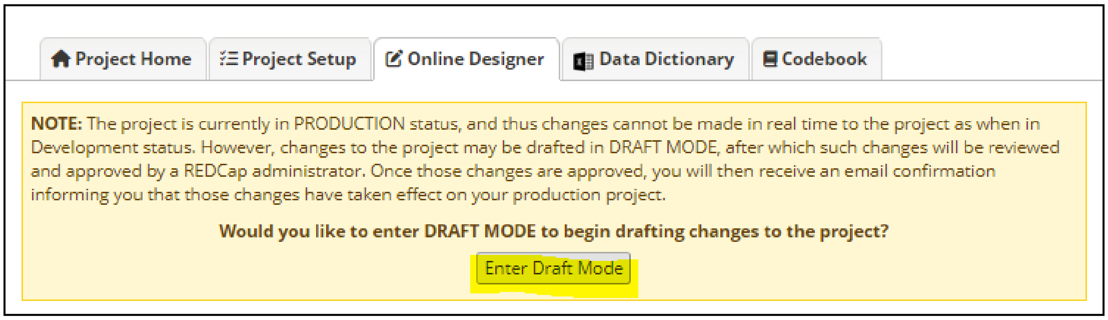
12. Can I make changes to a project after moved to production?

Yes, a project can be moved back to development status to make the necessary changes such as revision to existing project instruments, addition of new instruments. To move a project from Production to Development, please contact the REDCap Administrative Team so that they can further assist.

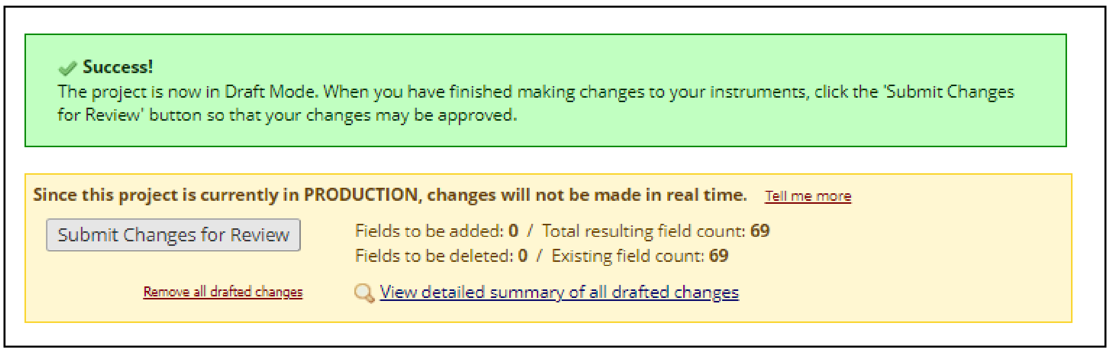
When making changes in production, REDCap offers built-in checks to safeguard against unintentional data loss caused by, for example, deleting a field, changing a field type, altering a multiple-choice option, rewording a field prompt. To make changes while in production, the project must be entered into draft mode, and the changes submitted for review when completed. There are some changes that will need to be reviewed and committed by the REDCap Administrator team. This is done to ensure your data is not adversely affected by the changes you are making.

To enter into draft mode:

- When in the project, navigate to the Designer link and click the Online Designer tab. Please note: Only team members with the
- Click on the Enter Draft Mode button.

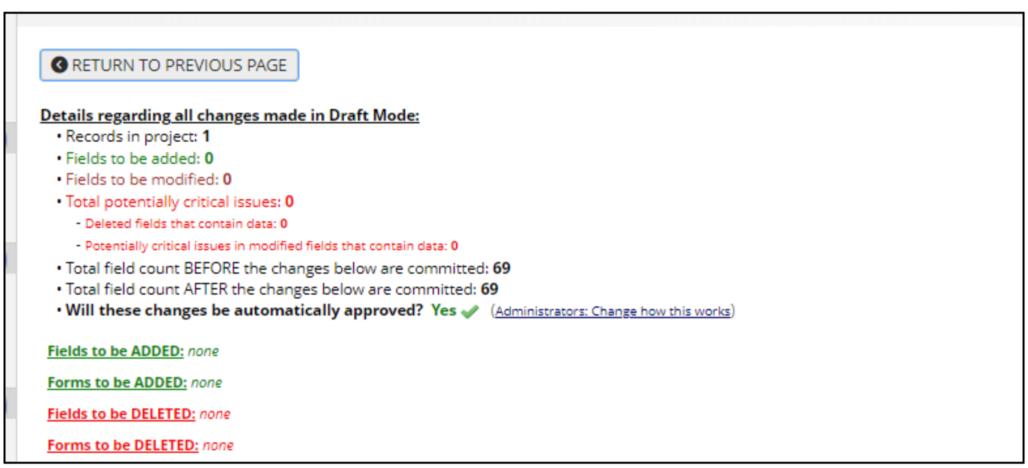


- The following message will appear.



Process after changes made:

After making the changes, it is highly recommended to click on the “View detailed summary of all drafted changes”, screenshot below, link which displays a preview of all the fields that are added, removed, and modified, and drawing attention to changes that could result in data corruption or deletion. Any changes in RED should be carefully reviewed.

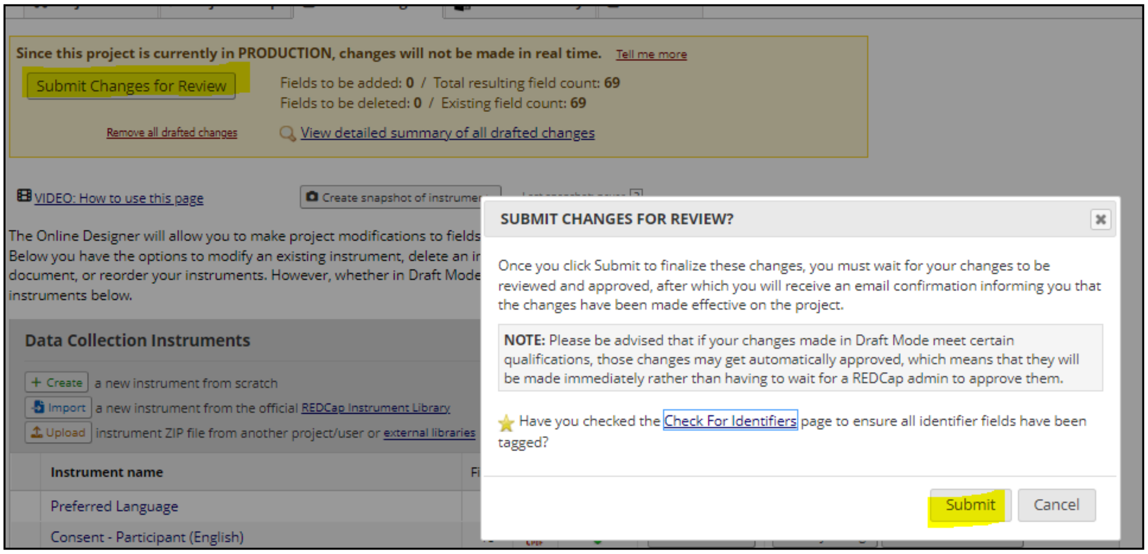


This table summarizes types of changes and possible impact. The changes that need to be carefully made and considered are to those fields where data already has been collected.

✓ = Changes should not affect data ✗ = Changes will affect data ! = Change may affect data

		Changing to....						
		Text	Notes	Calculation	Multiple Choice (Radio or Dropdown)	Checkboxes	Yes - No	True - False
Initial Field Type	Text		✓	✗	✗	✗	✗	✗
	Notes	✓		✗	✗	✗	✗	✗
	Calculation	✗	✗		✗	✗	✗	✗
	Multiple Choice (Radio or Dropdown)	!	!	✗		✓	!	!
	Checkboxes	!	!	✗	✗		!	!
	Yes - No (coded 1, 0)	!	!	✗	!	!		✓
	True - False (coded 1, 0)	!	!	✗	!	!	✓	

When ready to submit changes, click the Submit Changes for Review button and then click Submit. As stated, there are changes that will need to be reviewed and committed by the REDCap Administration team to prevent undesirable changes or loss of data.



Tips and recommendations for the following project changes:

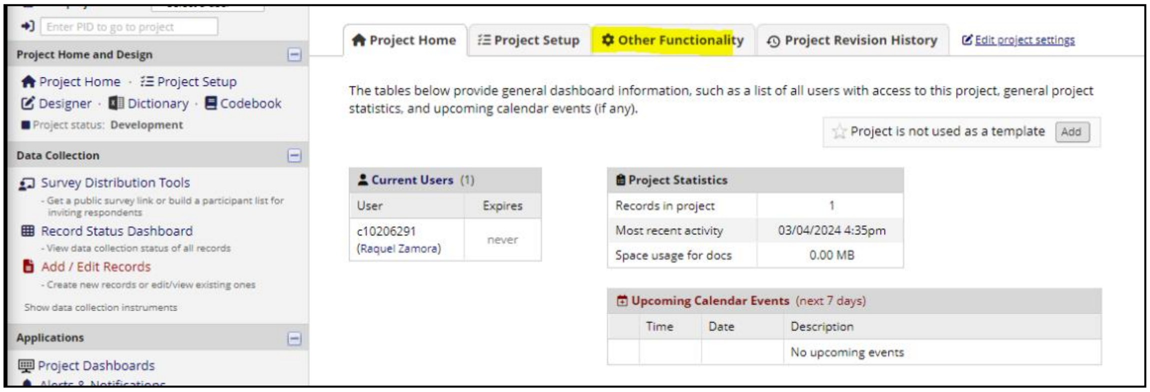
- **Changing labels** - If your field contains data, you may want to instead create an entirely new field to capture the new data and then use the @HIDDEN action tag to hide the field you will no longer be using. This allows the field and data to remain in your project for reports & exports, but you will no longer see it on data entry pages.

- **Deleting fields** - If your field does not contain data, deleting the field can be acceptable. If your field contains data, you may want to instead use the @HIDDEN action tag to hide the field you will no longer be using. This allows the field and data to remain in your project for reports & exports, but you will no longer see it on data entry pages.
  - To 'undo' the field deletion, you will need to re-create that field. Your project codebook (found under the Project Home and Design section) will list all fields in your project - including the one you had planned to delete. You can re-enter a new field and use the same variable name you previously had.
  - The other option is to use the 'Remove all drafted changes' link found in the online designer - draft mode area (yellow section). This will remove ALL planned changes. There is no way to accept some changes, but not others.

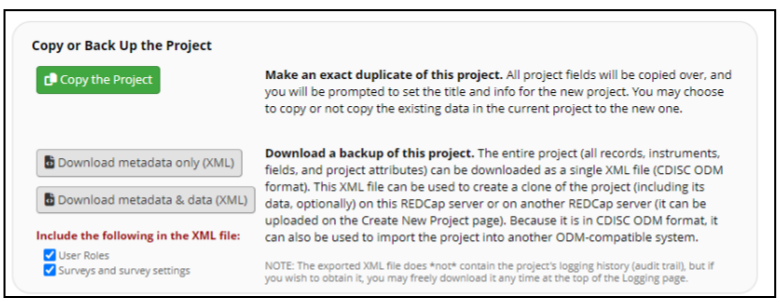
13. How to copy a project

To initiate a copy request, please follow the steps below:

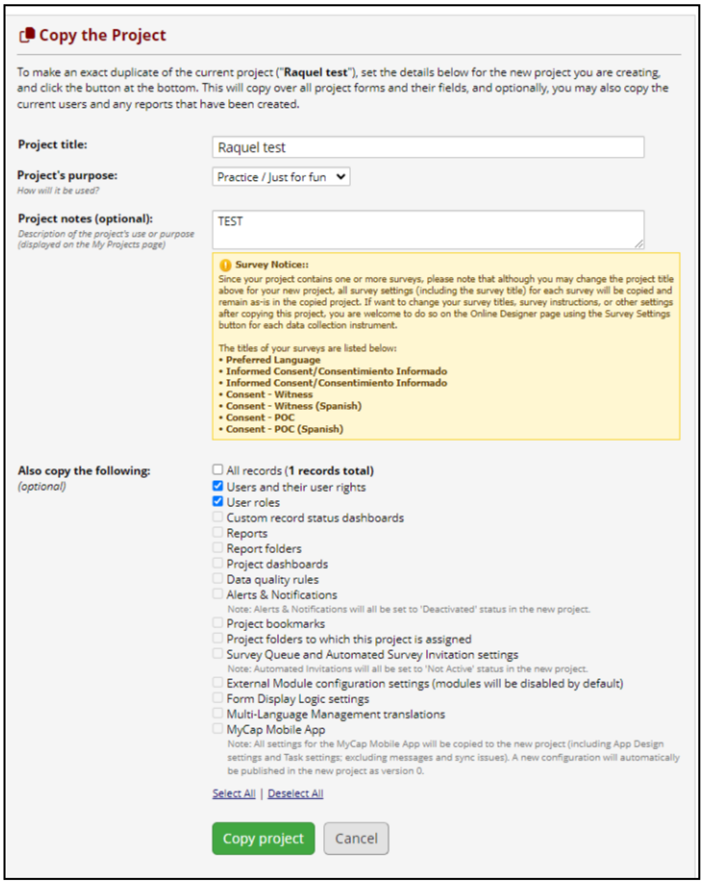
- Navigate to My Projects to locate the project you wish to have copied.
- Click on the “Project Setup” link under the “Project Home and Design” section on the left.
- Click on the “Other Functionality” tab on the right.



- Click on the green “Copy the project” button under the “Copy or Back Up the Project” section.



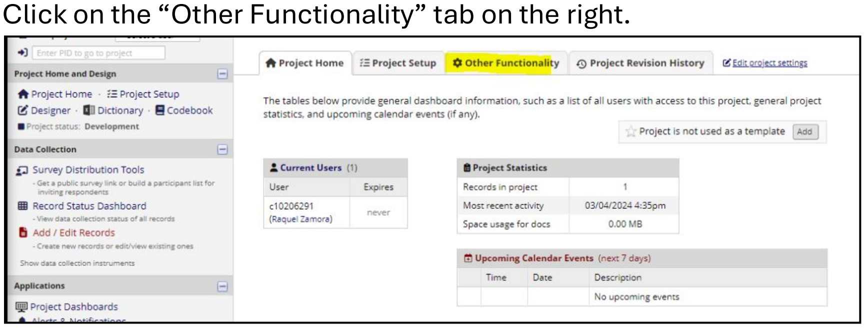
- Enter the new project title in the corresponding text box, select the project purpose, select the options that you wish to have copied, click on the “Copy project” button.



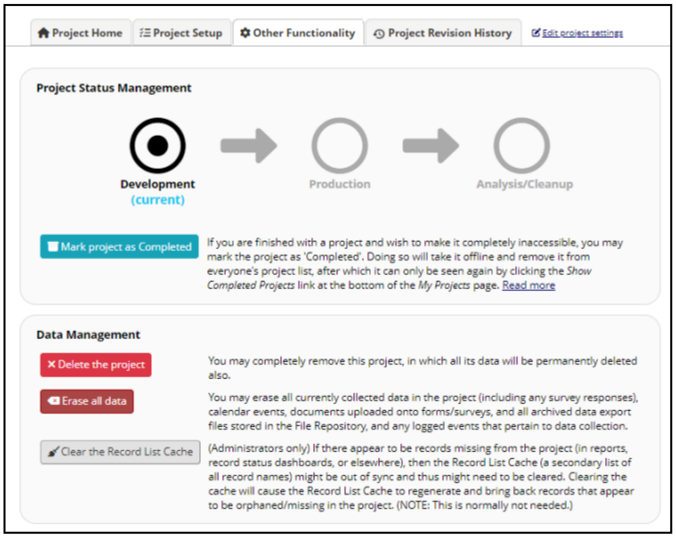
Once the above steps have been completed, a request will be sent to our team, and if needed, our team will send a decision tree survey for you to submit.
After this has been received, we will then be able to move forward with your request.

14. How to delete a project

- Navigate to My Projects to locate your project to be deleted.
- Click on the “Project Setup” link under the “Project Home and Design” section on the left.
- Click on the “Other Functionality” tab on the right.



- Click on the (red) “Delete the project” button under the “Data Management” section (on the right)

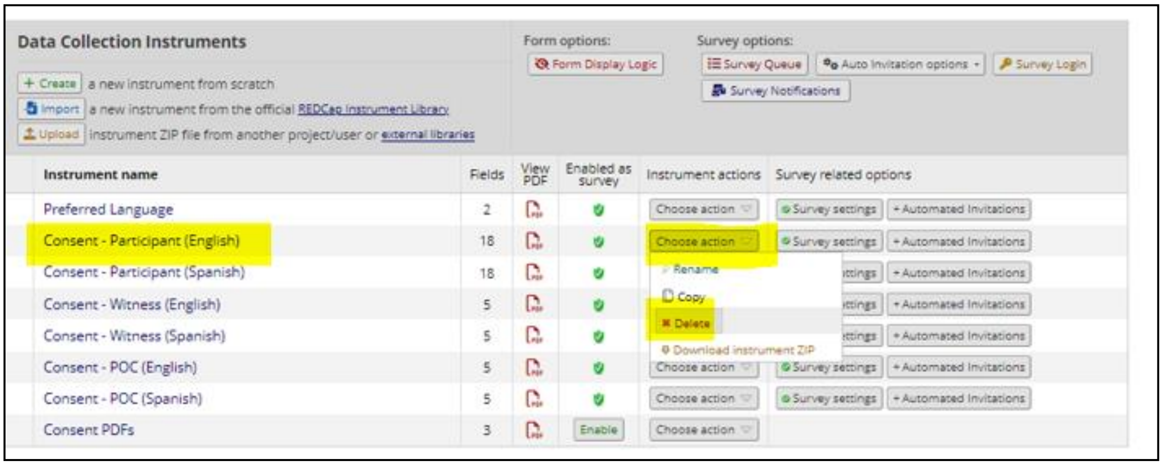


- Type “DELETE” in the red textbox and click on the “Delete the project” button to permanently delete the project.

- Confirm your decision by clicking on the “Yes, delete the project” button.
- Click on the Close button.
- Your project will be deleted, and you will be redirected to your “My Projects” page.

15. How to copy or delete an instrument within a project

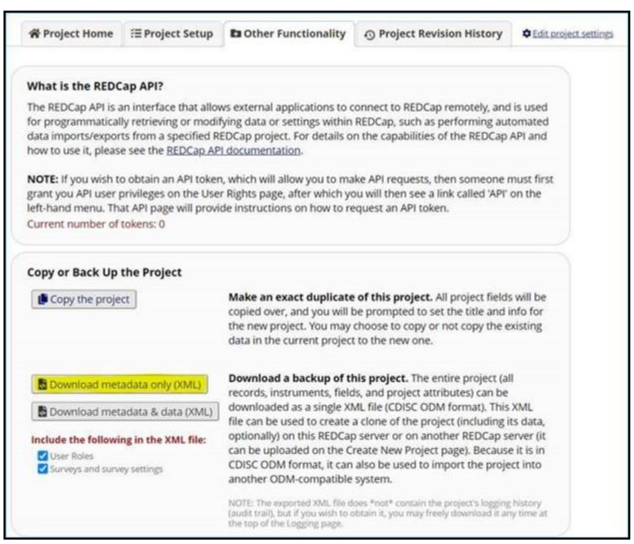
- Navigate to My Projects to locate your project that you wish to have copied.
- Click on the Designer link under the “Project Home and Design” section on the left.
- Click on the “Choose Action” button on the right, corresponding to the instrument that you wish to delete or copy.
- Select the "Delete" or “Copy” option.



- Depending on the action selected you will be asked to confirm whether you would like to copy or delete the instrument.
- Your list of instruments will update, with the deleted or copied instrument.

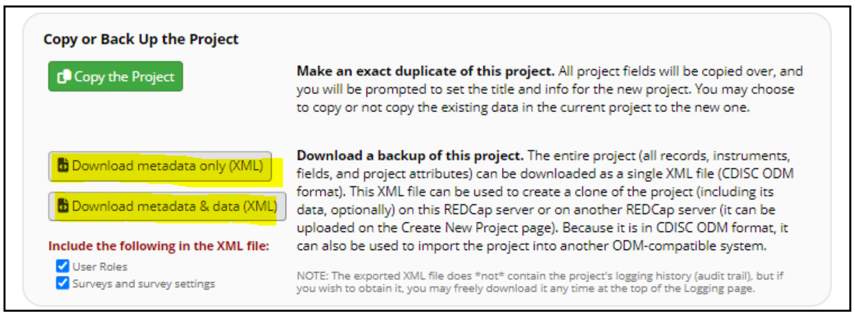
16. How to create an XML File

- Navigate to My Projects to locate your project in REDCap.
- Click on the “Project Home” link under the “Project Home and Design” section on the left.
- Click on the “Other Functionality” tab on the right.
- Click on the “Download metadata only (XML): button:

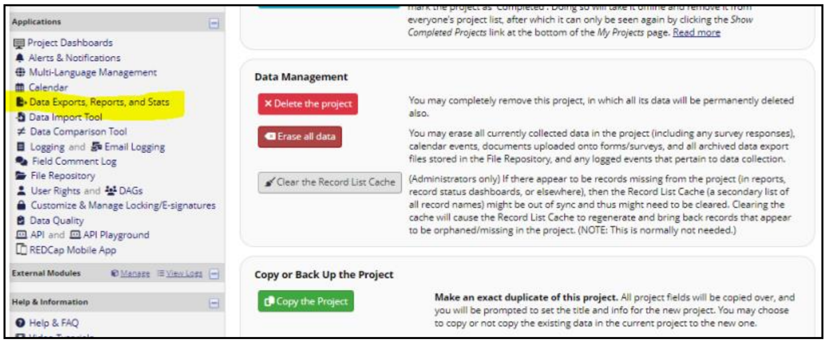


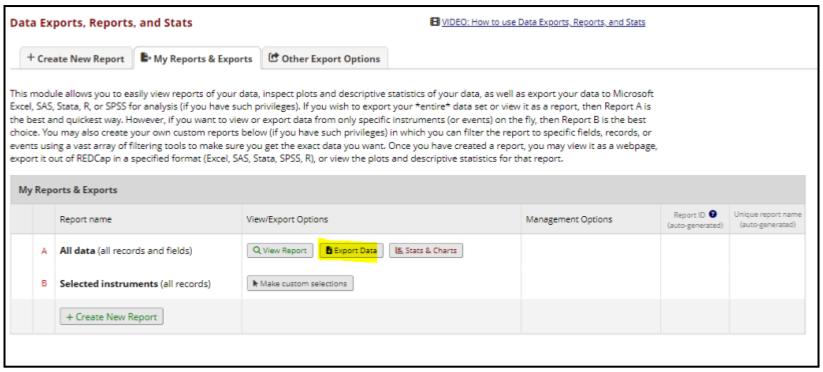
17. Instructions to backup project and data (*highly recommended before making changes to data fields on live project*)

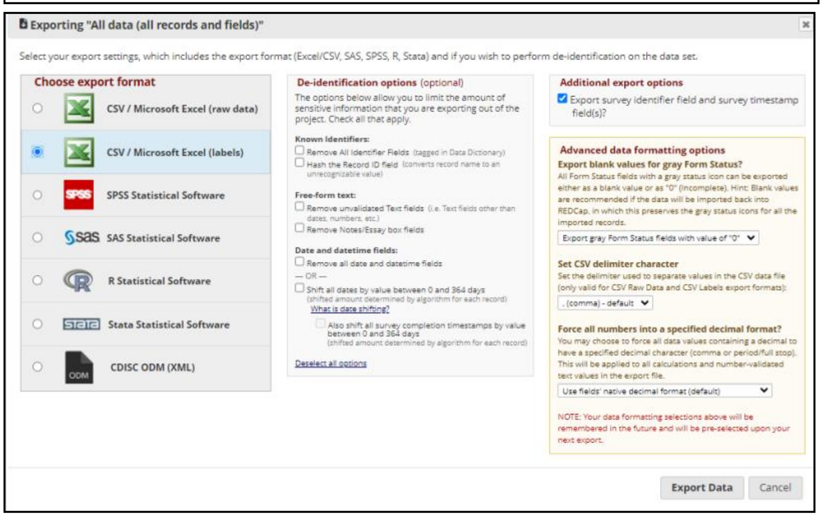
- Navigate to My Projects to locate your project.
- Click on the “Project Setup” link under the “Project Home and Design” section on the left.
- Click on the “Other Functionality” tab on the right.
- Scroll to the “Copy or Back Up the Project” section (on the right)
- Click on the “Download metadata only (XML)” or “Download metadata & data (XML)” button after selecting your options for user roles, surveys and survey settings, and survey queue.
    - ☐ The “Download metadata only (XML)” option will create a backup of the project structure only.
    - ☐ The “Download metadata & data (XML)” option will create a backup of the project and data.



Another way to backup your project’s data is by navigating to the “Data Exports, Reports, and Stats” link under the Applications section on the left, click Export Data, and select the desired data format option to export.

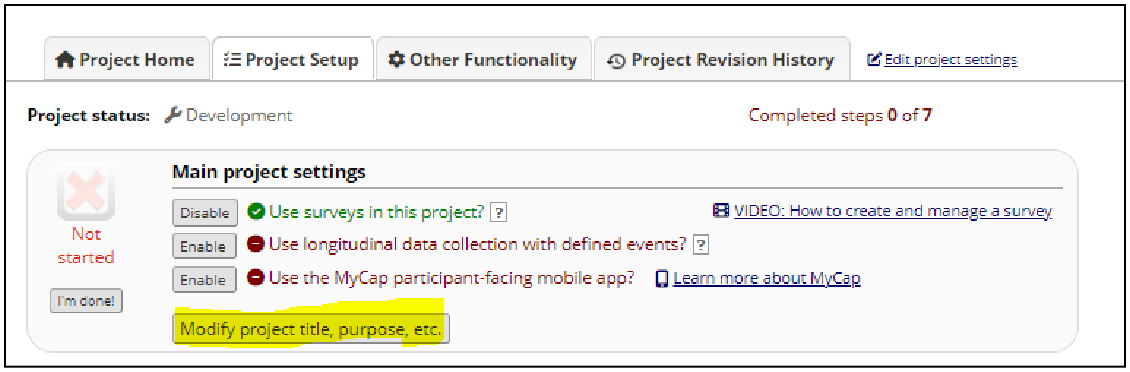




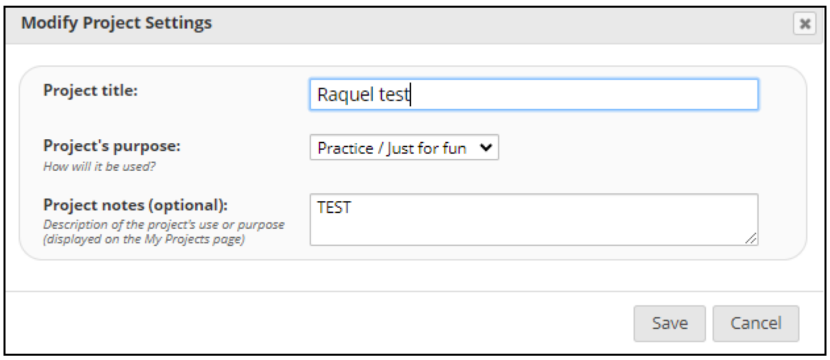


18. How to change the project details (i.e. title, purpose etc.)

- Navigate to My Projects to locate your project.
- Click on the “Project Home” link under the “Project Home and Design” section on the left.
- Click on the “Project Setup” tab on the right.
- Click on the “Modify project title, purpose, etc.” button under the “Main project settings” section.



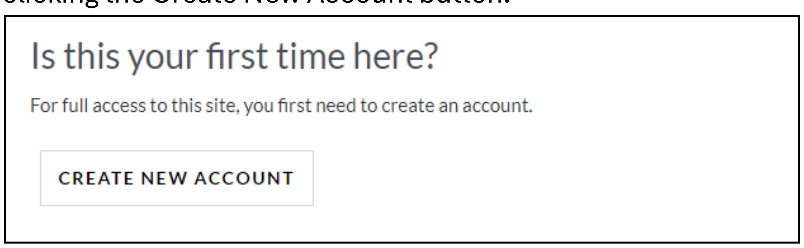
- Update the project details.



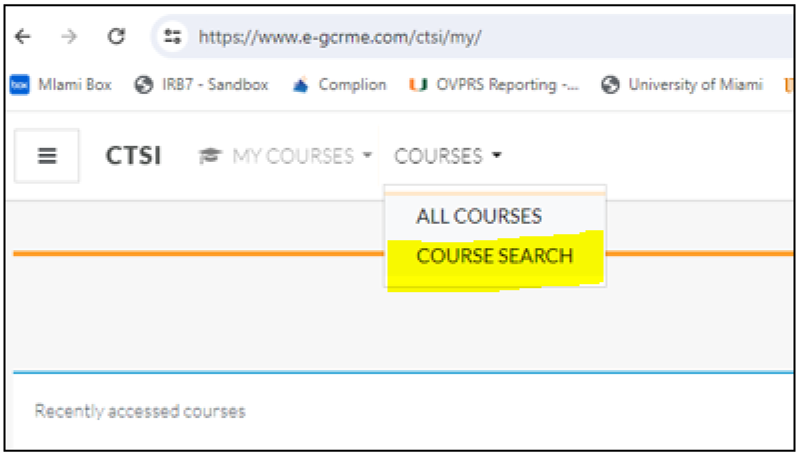
- Click on the Save button to commit your changes.

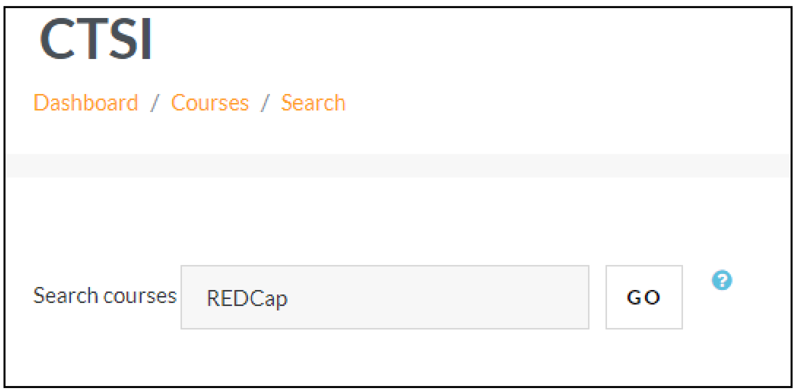
19. Where to access the REDCap e-consent trainings

- Visit the Moodle website by going to https://www.e-gcrme.com/ctsi/
- If this is your first-time visiting Moodle, you will have to create a Moodle account by clicking the Create New Account button:



- When you log into Moodle, click on Course Search and type REDCap:



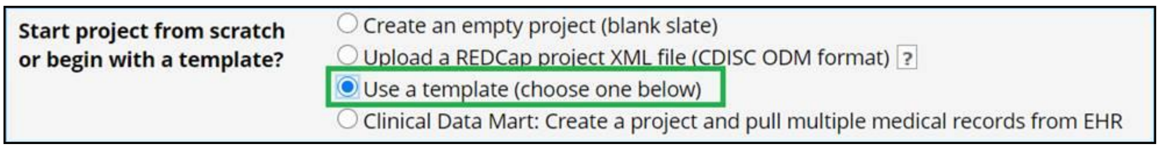


- Moodle will return all the REDCap related courses. The e-Consent courses will display for you to select from. The University provides two versions of REDCap. One version is for research that is not FDA regulated. The other version is compliant with 21 CFR Part 11, for FDA-regulated research. It is important to use the FDA version for all research involving investigational drugs, biologics, vaccines and medical devices.

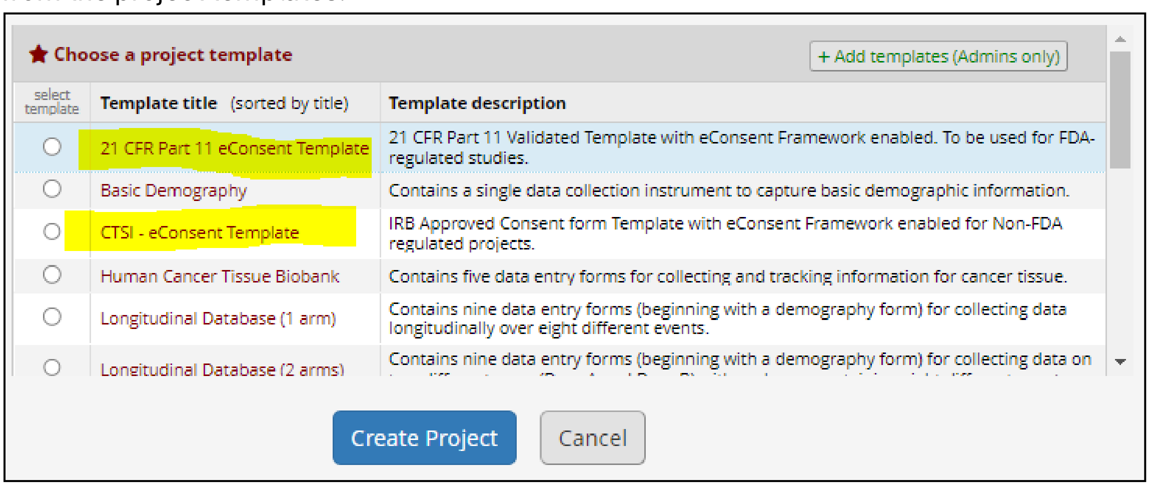
- **Please note:** The “21 CFR Part 11: REDCap e-consent” is mandatory if you plan to use REDCap as the e-Consent tool to consent study participants for a research study that **has FDA oversight**. If the study does not have FDA oversight, the other course is optional, but highly recommended to help you understand the e-consent workflow and process. For information on remote e-consenting please refer to the [Investigator Manual](#).

20. How to create a consent project

- Navigate to REDCap (redcap.miami.edu)
- Click on the "+ New Project" link at the top of the screen or navigate to https://redcap.miami.edu/index.php?action=create#/
- Enter the project title and purpose.
- For the "Start project from scratch or begin with a template?" question, select "Use a template (choose one below) option:



- Select the "21 CFR Part 11 eConsent Template" or the "CTSI – eConsent Template" from the project templates:

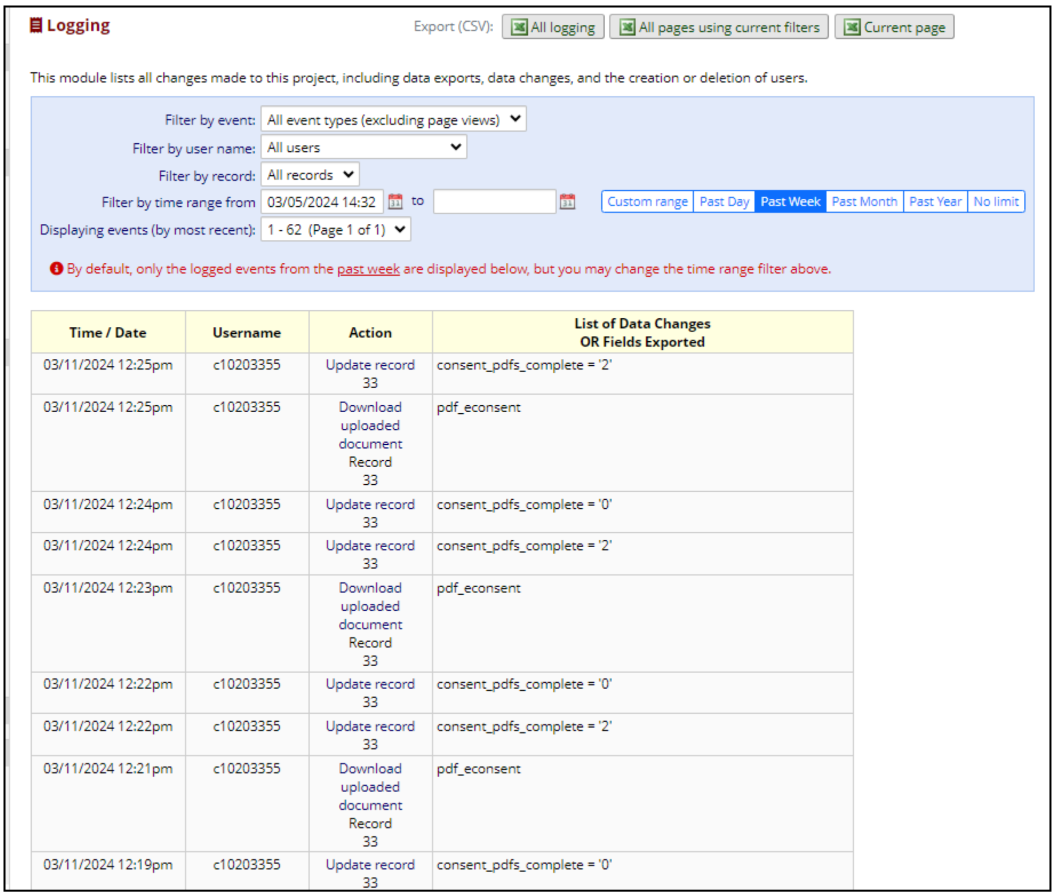


- Click on the "Create Project" button.
- An email will be sent to our team with the request, and if needed, our team will send a decision tree survey to you/the requestor to complete.
- Upon completion of the decision tree survey, the project with the template will then be completed.
- **REMINDER**: If the "21 CFR Part 11 eConsent Template" is used, all study team members on the research study must take the mandatory eConsent training video.

21. How to view the activity log for a project

- Navigate to My Projects to locate your project.
- Click on the Logging link under the Applications section on the left.

- The project logs will show on the right.
- Click on the drop-down arrow for the "Filter by event" option, and select "Record created-updated-deleted" (or whatever filter you prefer)



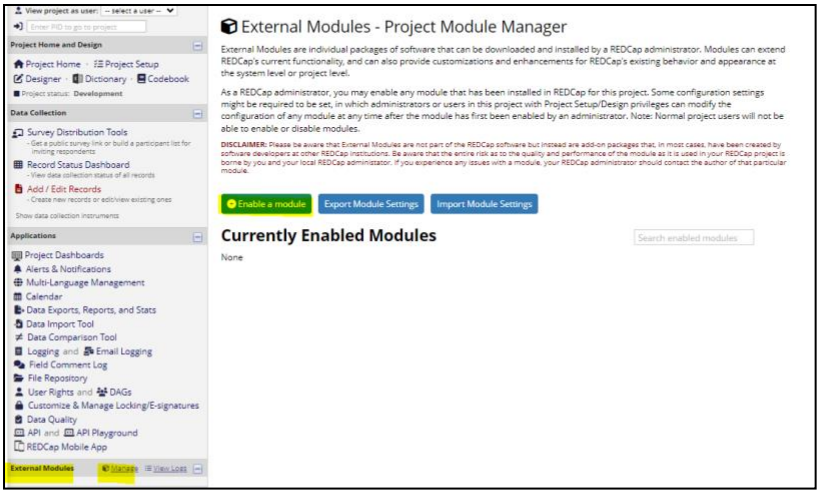
Time / Date	Username	Action	List of Data Changes OR Fields Exported
03/11/2024 12:25pm	c10203355	Update record 33	consent_pdfs_complete = '2'
03/11/2024 12:25pm	c10203355	Download uploaded document Record 33	pdf_econsent
03/11/2024 12:24pm	c10203355	Update record 33	consent_pdfs_complete = '0'
03/11/2024 12:24pm	c10203355	Update record 33	consent_pdfs_complete = '2'
03/11/2024 12:23pm	c10203355	Download uploaded document Record 33	pdf_econsent
03/11/2024 12:22pm	c10203355	Update record 33	consent_pdfs_complete = '0'
03/11/2024 12:22pm	c10203355	Update record 33	consent_pdfs_complete = '2'
03/11/2024 12:21pm	c10203355	Download uploaded document Record 33	pdf_econsent
03/11/2024 12:19pm	c10203355	Update record 33	consent_pdfs_complete = '0'

- The page will refresh and show the applicable events for the filter selected.

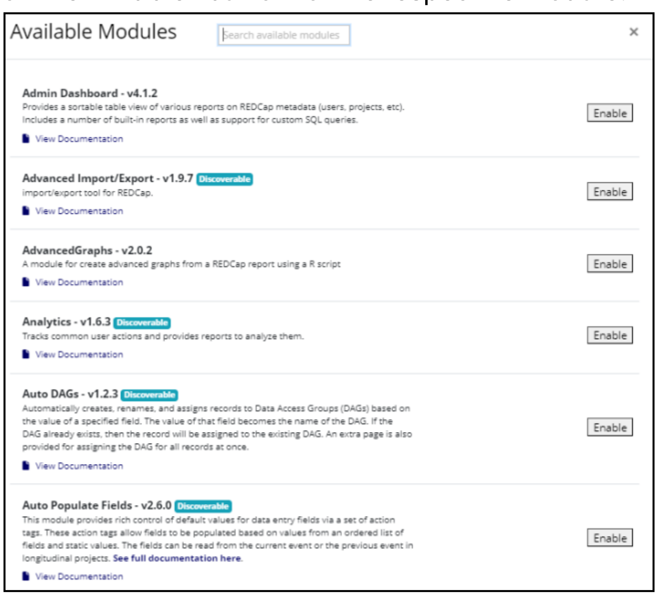
22. How to enable modules for your projects

External modules are used to customize and enhance the functionality of your REDCap project. Follow the steps below to view the available External Modules:

- Navigate to My Projects to locate your project.
- Click on the “External Modules” under the Applications section on the left and click on the green “Enable a module” button on the right:

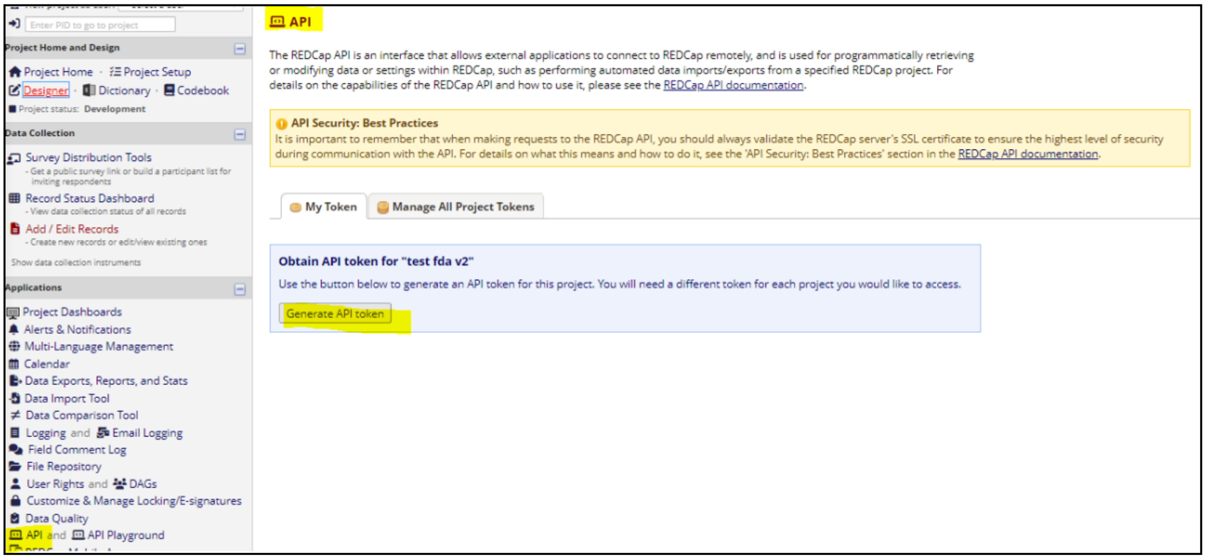


- On the popup window that appears, search for the module that you would like and click on the “Enable” button for the respective module:



23. How to generate an API Token

- Navigate to your project in REDCap.
- Click on the API link under the Applications section on the left.
- Click on the “Generate API token” button in the blue section on the right.



24. How to schedule a consultation with a REDCap Administration team?

Please submit a ticket to help@med.miami.edu, and be sure to include the word "REDCap" as part of the email Subject line. When the email is sent, a ServiceNow ticket will auto generate and will get triaged to a REDCap system administrator.

Examples of consultation, but not limited to are the following:

- How to I import data from an external system into REDCap
- Assistance with complex edits to projects
- Deletion of project data and how to recover
- Should I use REDCap for a given business or research use case?
- How to use REDCap's API?
- How can I get my project to integrate with EPIC data?
- How do I get access to use Twilio/Mozio?
- What is the process to use REDCap Mobile App?
- Use of MyCap Mobile?

25. How to contact REDCap Support?

Please send an email to help@med.miami.edu and be sure to include REDCap as part of the email subject line. Please include a detailed description of the matter at hand. If it is regarding a system issue, we ask that you include the steps to reproduce the issue and screenshots of any error received. Please include a REDCap project ID if relevant to the matter at hand. **The more information provided, the better.**