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## 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.

## 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](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.

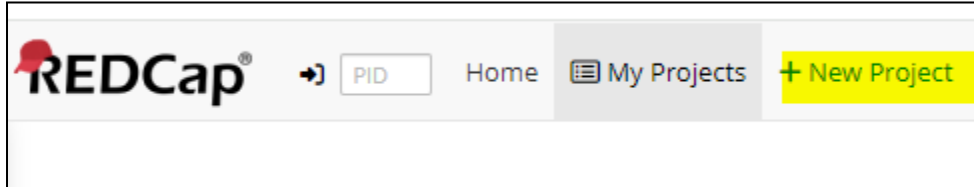
### 6. How to request a new project:

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

- Log into REDCap at [redcap.miami.edu](http://redcap.miami.edu).

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- 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)?**

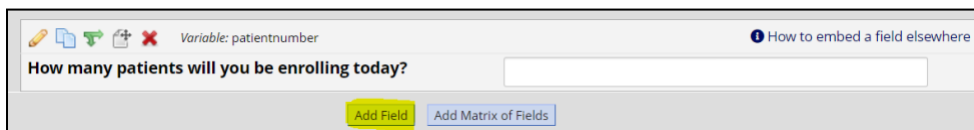
The Decision Tree Survey (DTS) is required for all projects. The DTS determines the eligibility of your project to be implemented in REDCap. This is a required step for your project to be eligible for REDCap, and all questions must be answered. Upon completing and submitting the DTS, an email is sent 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:**

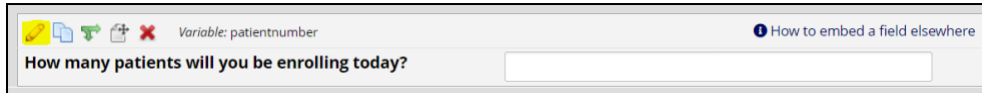
- Click on the “Add Field” button, just above or below the area/section that you’d like to insert the new variable/field:



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**To modify a variable:**

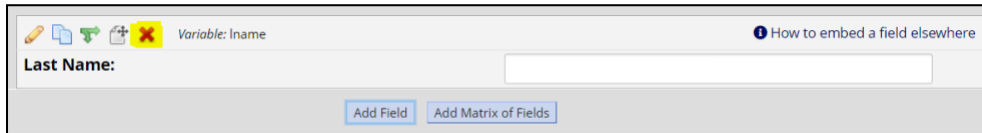
- Click on the pencil icon for the field you wish to modify.



- 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:**

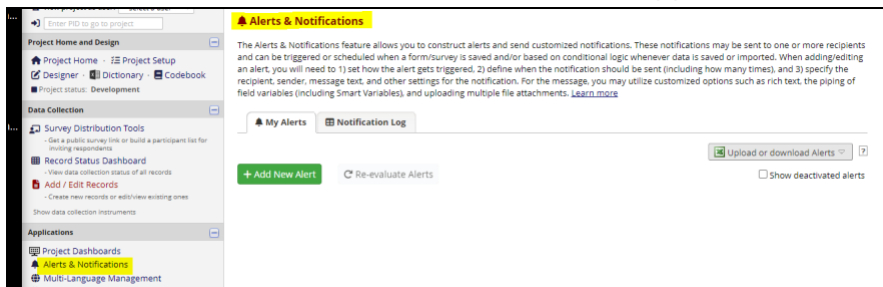
- Click on the red “x” corresponding to the item that you wish to remove:



- 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 Alert form and click on the green “Save” button at the bottom to save / add the new alert.

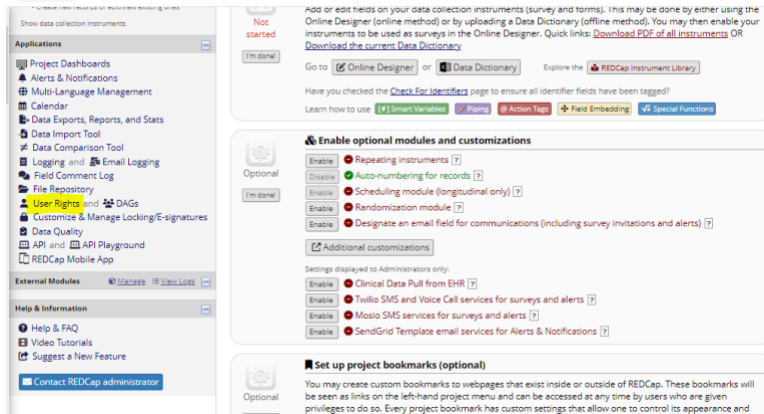
**10. How to add and remove team members on a project?**

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](#).

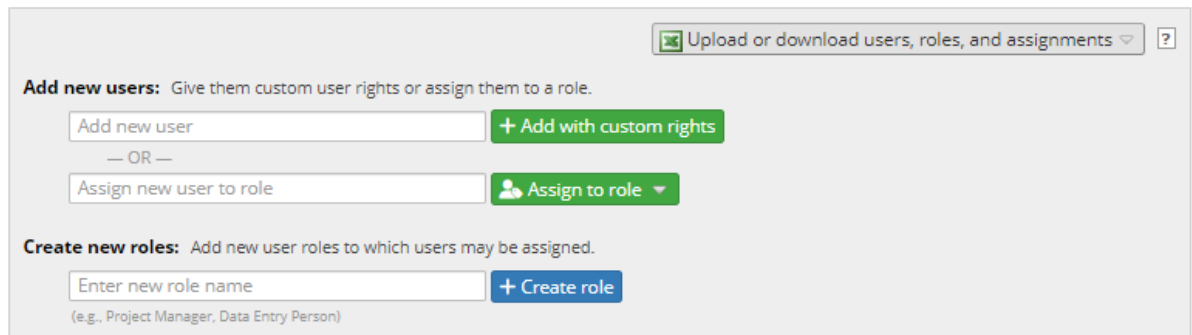
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**To add team members to project:**

- 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:**

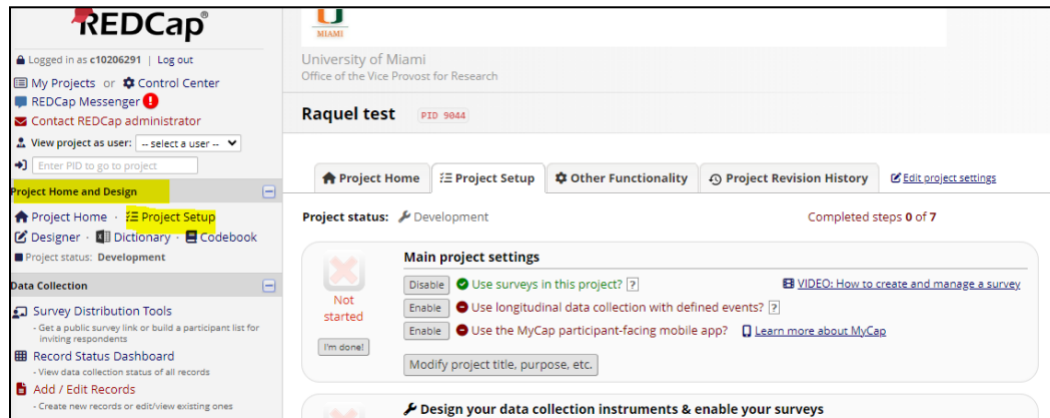
- While in the User Rights module, click on the team member’s name.
- Click on Edit user privileges.
- Click the Remove user button on the bottom right hand of the Editing existing user window.

## 11. When and how to move a project to production

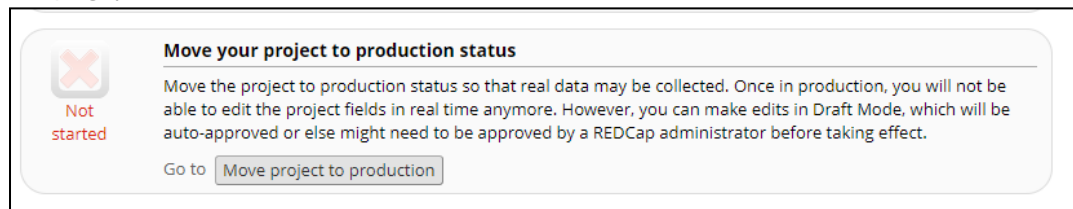
**When to move a project to production:** All REDCap projects begin in **Development** mode. After the project is developed and tested thoroughly, the project must be moved to **Production** mode before collecting "real" data. Prior to moving a project to Production, it is recommended that testing is 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.



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**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. (1 records)

Delete ALL data in the project (including any survey responses), calendar events, documents uploaded onto forms/surveys, and all archived data export files stored in the File Repository, and any logged events that pertain 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.

- 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.



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🏠 Project Home
☰ Project Setup
🔗 Online Designer
📖 Data Dictionary
📄 Codebook

**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?**

Enter Draft Mode

- The following message will appear.

✔ **Success!**  
 The project is now in Draft Mode. When you have finished making changes to your instruments, click the 'Submit Changes for Review' button so that your changes may be approved.

Since this project is currently in PRODUCTION, changes will not be made in real time. [Tell me more](#)

Submit Changes for Review

Fields to be added: 0 / Total resulting field count: 69

Fields to be deleted: 0 / Existing field count: 69

[Remove all drafted changes](#)

[View detailed summary of all drafted changes](#)

**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.

🔍 RETURN TO PREVIOUS PAGE

**Details regarding all changes made in Draft Mode:**

- Records in project: 1
- Fields to be added: 0
- Fields to be modified: 0
- Total potentially critical issues: 0
  - Deleted fields that contain data: 0
  - Potentially critical issues in modified fields that contain data: 0
- Total field count BEFORE the changes below are committed: 69
- Total field count AFTER the changes below are committed: 69
- Will these changes be automatically approved? Yes ✔ [\(Administrators: Change how this works\)](#)

**Fields to be ADDED:** none




**Forms to be ADDED:** none

**Fields to be DELETED:** none

**Forms to be DELETED:** none

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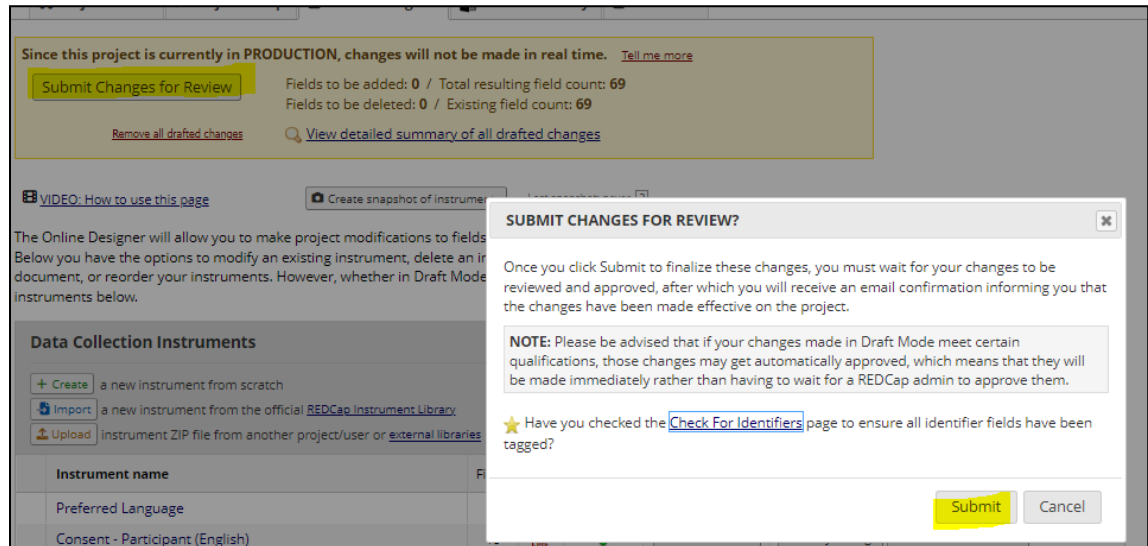
This table summarizes types of changes and possible impact. The changes that need to be carefully made and considered are to those fields where data already has been collected.

 = 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.

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*Tips and recommendations for the following project changes:*

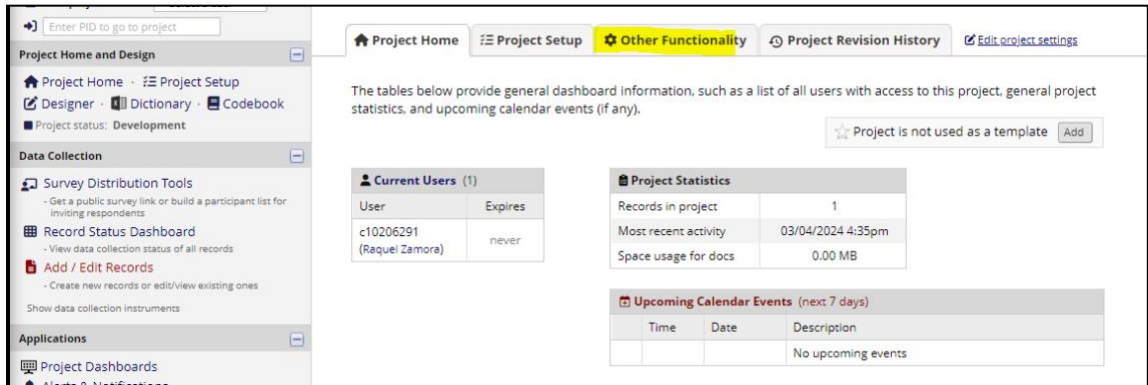
- **Changing labels** - If your field contains data, you may want to instead create an entirely new field to capture the new data and then use the @HIDDEN action tag to hide the field you will no longer be using. This allows the field and data to remain in your project for reports & exports, but you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

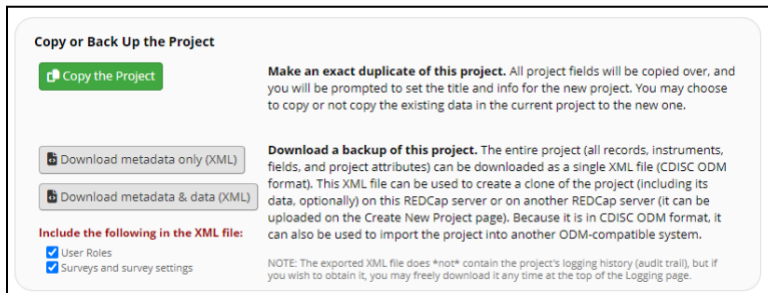
To initiate a copy request, please follow the steps below:

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- 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.

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### Copy the Project

To make an exact duplicate of the current project ("Raquel test"), set the details below for the new project you are creating, and click the button at the bottom. This will copy over all project forms and their fields, and optionally, you may also copy the current users and any reports that have been created.

**Project title:**

**Project's purpose:**

**Project notes (optional):**

**Survey Notices:**

Since your project contains one or more surveys, please note that although you may change the project title above for your new project, all survey settings (including the survey title) for each survey will be copied and remain as-is in the copied project. If want to change your survey titles, survey instructions, or other settings after copying this project, you are welcome to do so on the Online Designer page using the Survey Settings button for each data collection instrument.

The titles of your surveys are listed below:

- Preferred Language
- Informed Consent/ Consentimiento Informado
- Informed Consent/ Consentimiento Informado
- Consent - Witness
- Consent - Witness (Spanish)
- Consent - POC
- Consent - POC (Spanish)

**Also copy the following:** (optional)

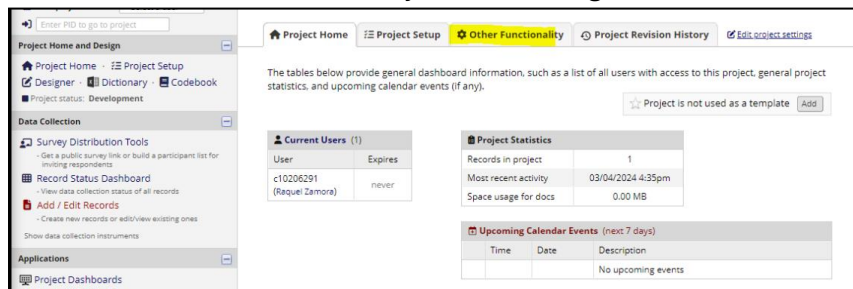
- All records (1 records total)
- Users and their user rights
- User roles
- Custom record status dashboards
- Reports
- Report folders
- Project dashboards
- Data quality rules
- Alerts & Notifications
- Note: Alerts & Notifications will all be set to 'Deactivated' status in the new project.
- Project bookmarks
- Project folders to which this project is assigned
- Survey Queue and Automated Survey Invitation settings
- Note: Automated Invitations will all be set to 'Not Active' status in the new project.
- External Module configuration settings (modules will be disabled by default)
- Form Display Logic settings
- Multi-Language Management translations
- MyCap Mobile App
- Note: All settings for the MyCap Mobile App will be copied to the new project (including App Design settings and Task settings, including messages and sync issues). A new configuration will automatically be published in the new project as version 0.

[Select All](#) | [Deselect All](#)

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.



The screenshot shows the REDCap project management interface. The left sidebar has tabs for "Project Home and Design", "Data Collection", and "Applications". The "Project Home and Design" tab is active, and the "Other Functionality" sub-tab is selected. The main content area displays project statistics and user information.

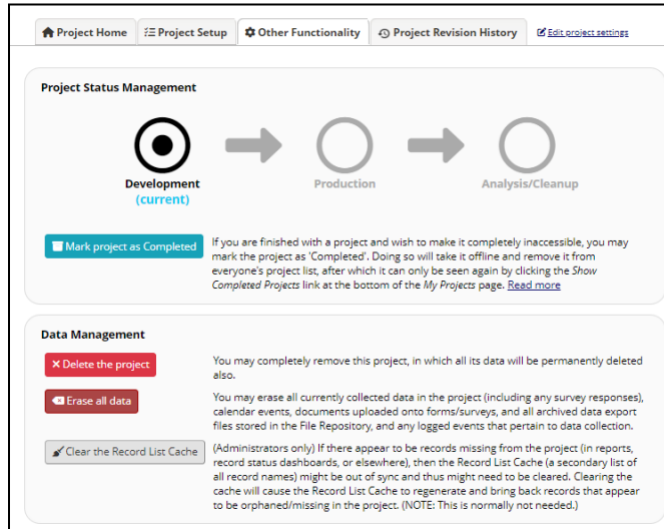
Current Users (1)	
User	Expires
c10206291 (Raquel Zamora)	never

Project Statistics	
Records in project	1
Most recent activity	03/04/2024 4:35pm
Space usage for docs	0.00 MB

Upcoming Calendar Events (next 7 days)		
Time	Date	Description
		No upcoming events

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- 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.

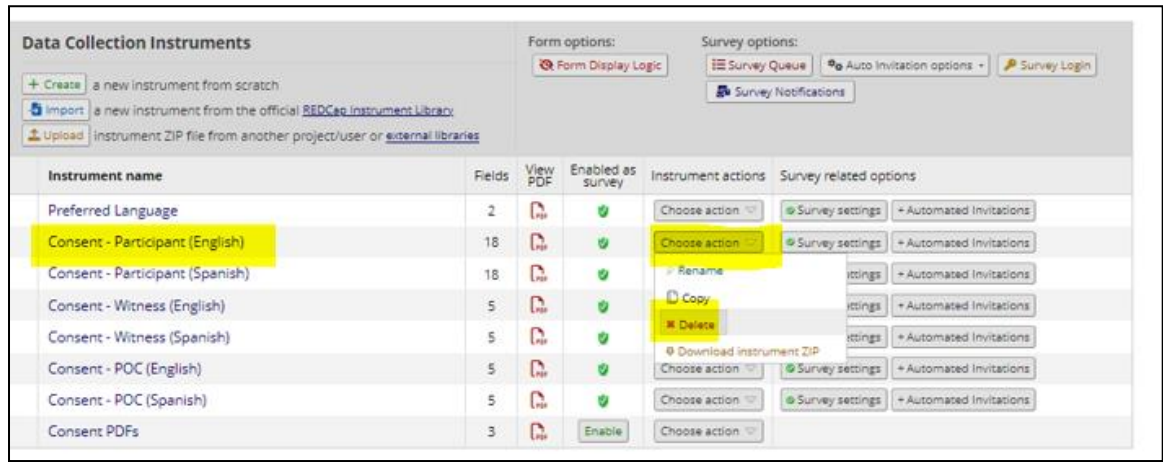


- Confirm your decision by clicking on the “Yes, delete the project” button.
- Click on the Close button.
- Your project will be deleted, and you will be redirected to your “My Projects” page.

**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.

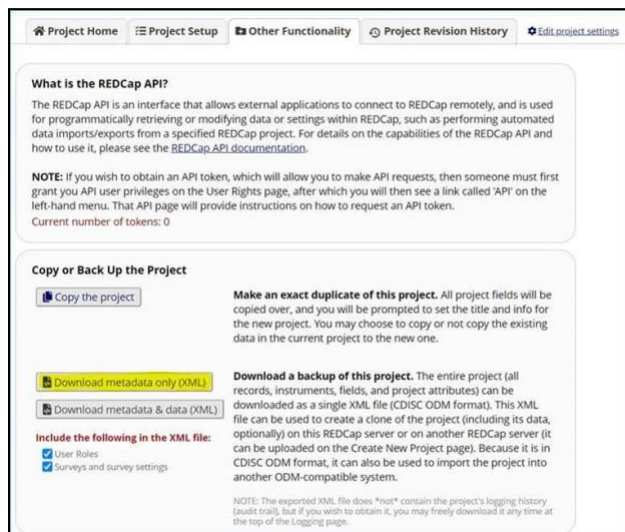
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- Depending on the action selected you will be asked to confirm whether you would like to copy or delete the instrument.
- Your list of instruments will update, with the deleted or copied instrument.

## 16. How to create an XML File

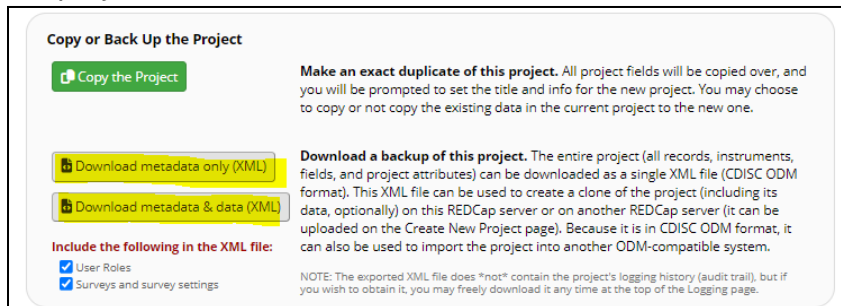
- Navigate to My Projects to locate your project in REDCap.
- Click on the “Project Home” link under the “Project Home and Design” section on the left.
- Click on the “Other Functionality” tab on the right.
- Click on the “Download metadata only (XML): button:





## 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.



**Copy or Back Up the Project**

**Make an exact duplicate of this project.** All project fields will be copied over, and you will be prompted to set the title and info for the new project. You may choose to copy or not copy the existing data in the current project to the new one.

**Include the following in the XML file:**

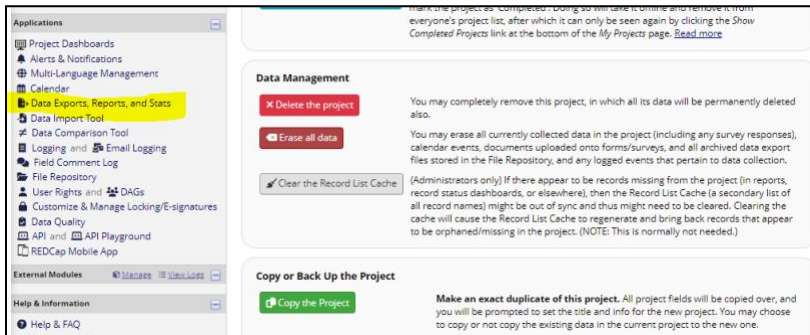
- User Roles
- Surveys and survey settings

NOTE: The exported XML file does not contain the project's logging history (audit trail), but if you wish to obtain it, you may freely download it any time at the top of the Logging page.

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.

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make the project's completion date to min date to terminate and remove from everyone's project list, after which it can only be seen again by clicking the Show Completed Projects link at the bottom of the My Projects page. [Read more](#)

**Data Management**

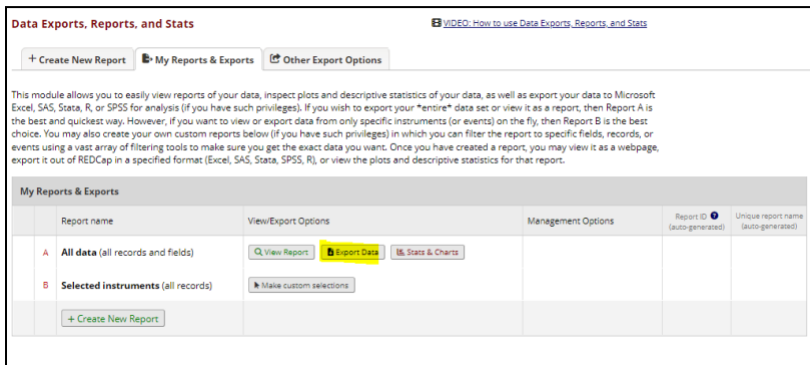
**Delete the project** You may completely remove this project, in which all its data will be permanently deleted also.

**Erase all data** You may erase all currently collected data in the project (including any survey responses), calendar events, documents uploaded onto forms/surveys, and all archived data export files stored in the File Repository, and any logged events that pertain to data collection.

**Clear the Record List Cache** (Administrators only) If there appear to be records missing from the project (in reports, record status dashboards, or elsewhere), then the Record List Cache (a secondary list of all record names) might be out of sync and thus might need to be cleared. Clearing the cache will cause the Record List Cache to regenerate and bring back records that appear to be orphaned/missing in the project. (NOTE: This is normally not needed.)

**Copy or Back Up the Project**

**Copy the Project** Make an exact duplicate of this project. All project fields will be copied over, and you will be prompted to set the title and info for the new project. You may choose to copy or not copy the existing data in the current project to the new one.



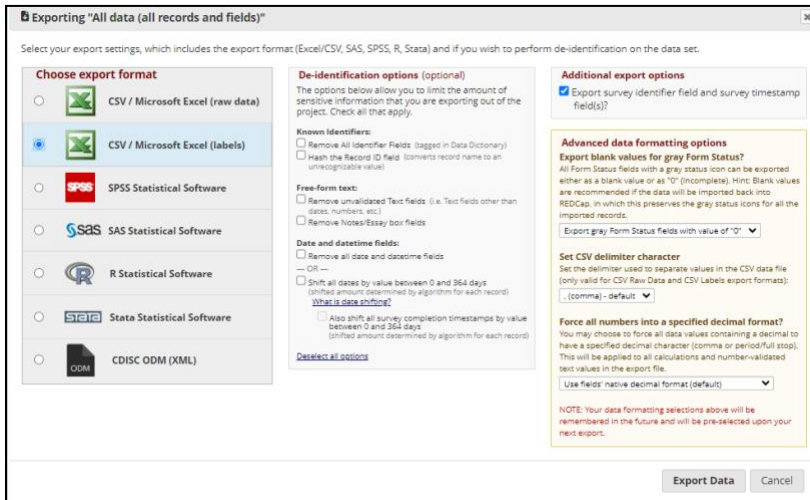
**Data Exports, Reports, and Stats** [VIDEO: How to use Data Exports, Reports, and Stats](#)

+ Create New Report | My Reports & Exports | Other Export Options

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.

Report name	View/Export Options	Management Options	Report ID (auto-generated)	Unique report name (auto-generated)
A All data (all records and fields)	View Report   Export Data   Stats & Charts			
B Selected instruments (all records)	Make custom selections			

+ Create New Report



**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 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):

(,|comma) - default

**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)

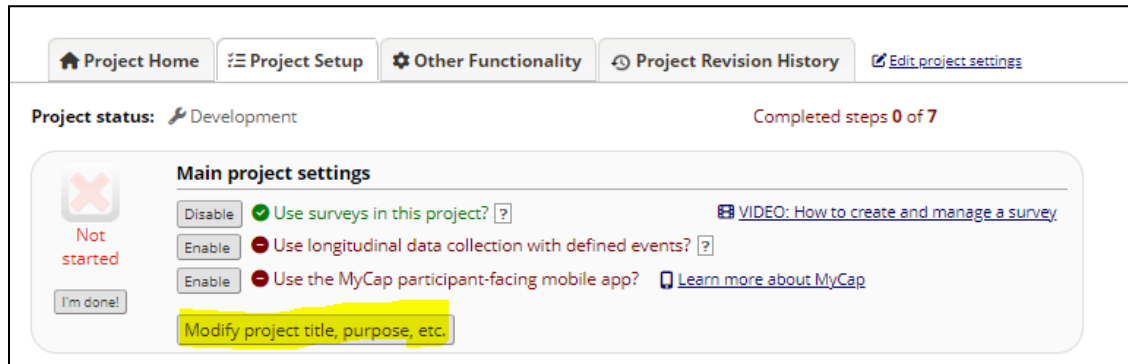
NOTE: Your data formatting selections above will be remembered in the future and will be pre-selected upon your next export.

Export Data | Cancel

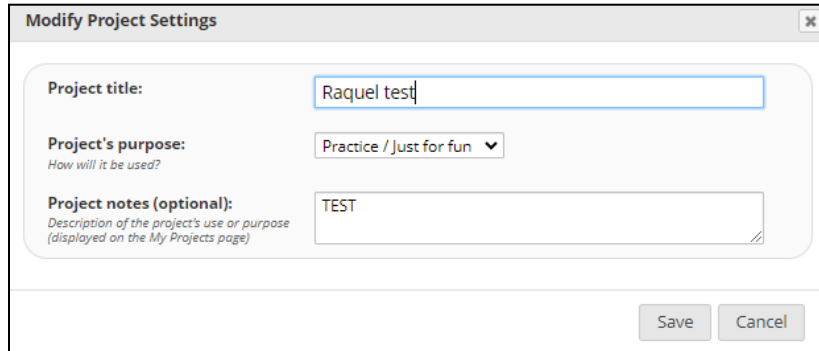
## 18. How to change the project details (i.e. title, purpose etc.)

- 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.

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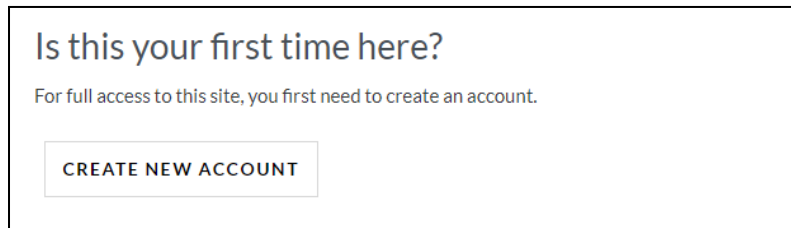
- Update the project details.



- Click on the Save button to commit your changes.

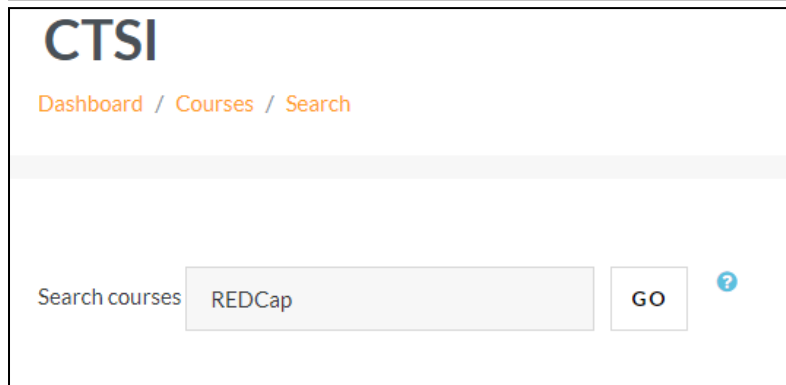
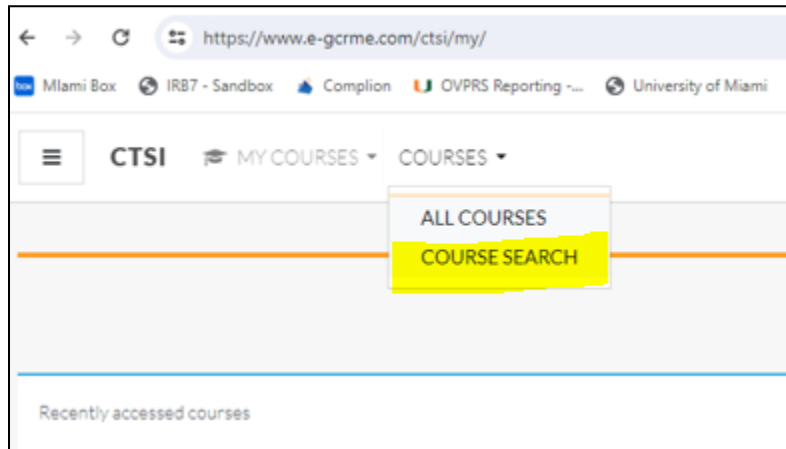
**19. Where to access the REDCap e-consent trainings**

- 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:

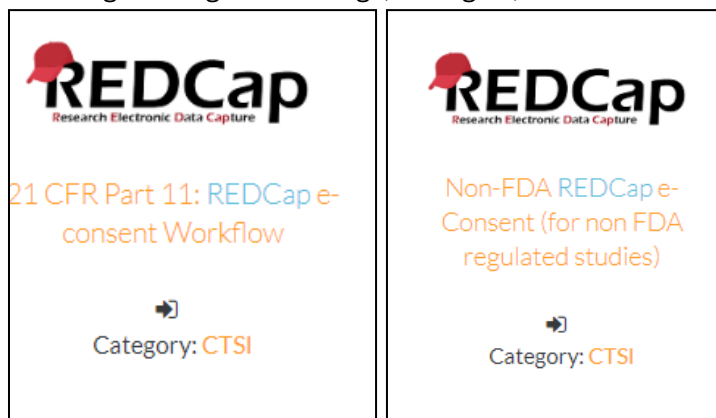


- When you log into Moodle, click on Course Search and type REDCap:

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- 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

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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:

**Start project from scratch or begin with a template?**

Create an empty project (blank slate)  
 Upload a REDCap project XML file (CDISC ODM format) ?  
 Use a template (choose one below)  
 Clinical Data Mart: Create a project and pull multiple medical records from EHR

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

★ Choose a project template + Add templates (Admins only)

select template	Template title (sorted by title)	Template description
<input type="radio"/>	21 CFR Part 11 eConsent Template	21 CFR Part 11 Validated Template with eConsent Framework enabled. To be used for FDA-regulated studies.
<input type="radio"/>	Basic Demography	Contains a single data collection instrument to capture basic demographic information.
<input type="radio"/>	CTSI - eConsent Template	IRB Approved Consent form Template with eConsent Framework enabled for Non-FDA regulated projects.
<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

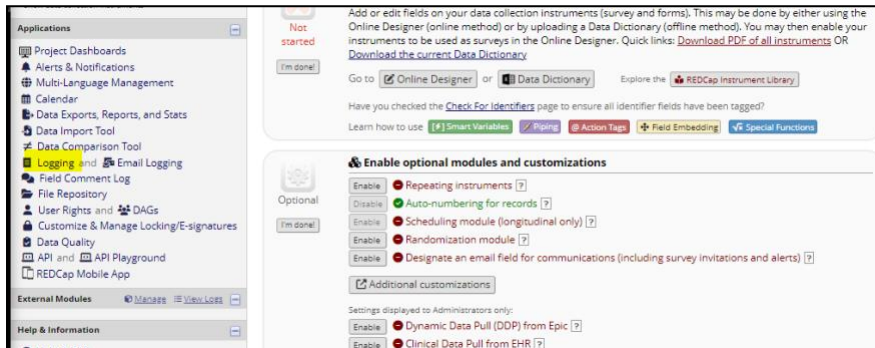
- Click on the “Create Project” button.
- An email will be sent to our team with the request, and if needed, our team will send a decision tree survey to you/the requestor to complete.
- Upon completion of the decision tree survey, the project with the template will then be completed.
- **REMINDER:** 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.

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- 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)

**Logging** Export (CSV):

This module lists all changes made to this project, including data exports, data changes, and the creation or deletion of users.

Filter by event:

Filter by user name:

Filter by record:

Filter by time range from:  to

Displaying events (by most recent):

By default, only the logged events from the **past week** are displayed below, but you may change the time range filter above.

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

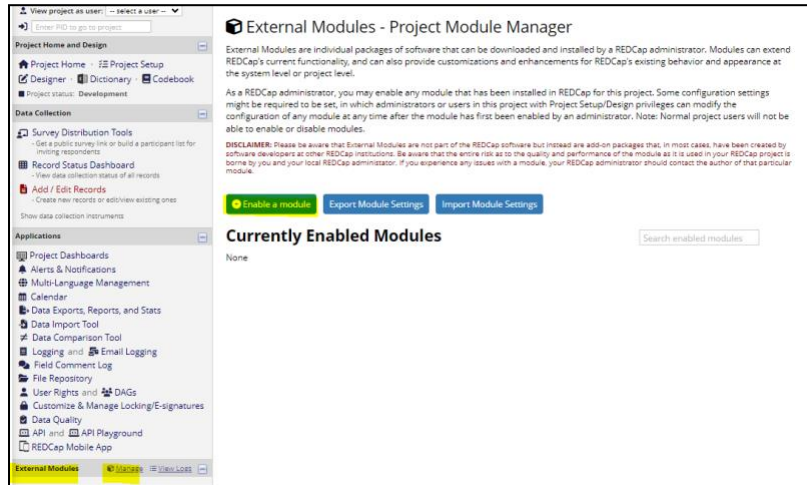
External modules are used to customize and enhance the functionality of your REDCap project. Follow the steps below to view the available External Modules:



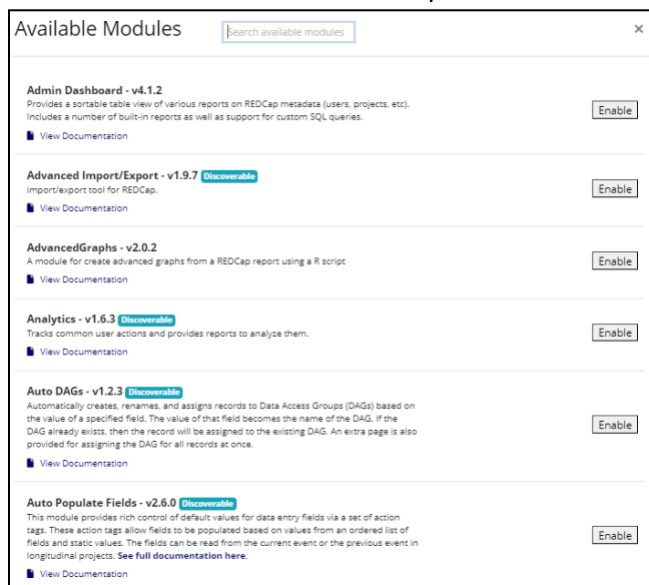
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- Navigate to My Projects to locate your project.
- Click on the “External Modules” under the Applications section on the left and click on the green “Enable a module” button on the right:



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

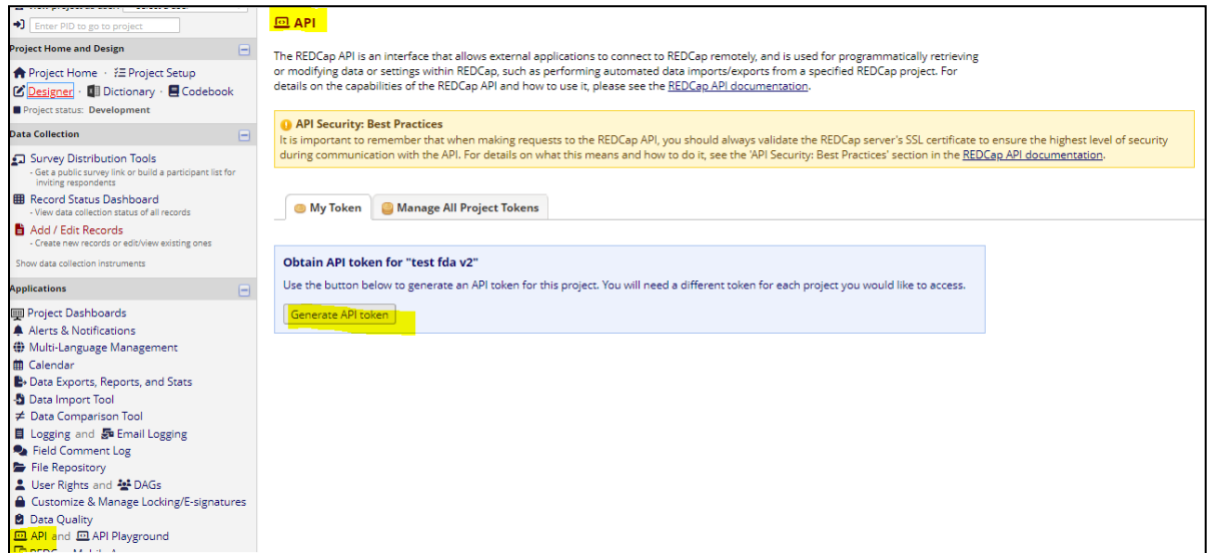


## 23. How to generate an API Token

- 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.



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

Please submit a ticket to [help@med.miami.edu](mailto: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](mailto: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.**



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