REDCap Leverages Project

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In order to capture leverages data, a tool is created in REDCap.

This project consists of two data collection instruments one of which is a repeatable form. Both are available to be used internally as a form as well as externally as a survey.

The first survey contains the basic necessary information to identify a request. This instrument is meant to be filled by an imported data file (Excel) and is not visible by external users. The file will be loaded by first getting the template and filling it from legacy db, Blackbud search, ICTR giant spreadsheet or any other source. This form can only be edited and visible internally.

The repeatable instrument can be filled several times. The responses can be edited also internally as well as externally even if it is submitted and/or marked as 'Complete'.

From External Recipient's Point of View

When an email is sent to participants through REDCap, they will have a link to their survey queue that takes them to a screen like the following and they need to click the 'view all' link (pointing to with the red arrow in the image below) to see the whole list:

Close survey que	ue
E Survey Queue	Get link to my survey queue
	vey queue, which lists any other surveys that you have not yet completed. y, click the 'Begin survey' button next to the title.
Status	Survey Title
	1
Completed	All surveys in your queue have been completed! (view all)

In the list, there is option to edit any of the leverages they entered previously or enter a new one:

Survey Queue		Get link to my survey queue
	urvey queue, which lists any other surveys that you have not yet completed. /ey, click the 'Begin survey' button next to the title.	
Status	Survey Title 2	
Completed	General Grant Information	🖍 Edit response
Completed	Leverage Sources – #1: nhi	🖍 Edit response
Completed	Leverage Sources – #570: Benefit Auctions	🖍 Edit response
Completed	Leverage Sources – #571: Individual and Buisness Donations	3 Edit response
Completed	Leverage Sources – #585: CATCH Grant	🖍 Edit response
	Leverage Sources - #590: CHSP Grant & Reilly Baldwin Grant	✓ Edit response

The links in the queue (green box 3) are the entries already filled before and the user is able to go to any of them and change them.

They also can add a new leverage by hitting the 'Take this survey again' button.

From Internal Recipient's Point of View

For a user to be able to reach the project internally, they have to have a REDCap account that can be requested be filling out a form through the following link:

https://redcap.ictr.wisc.edu/surveys/?s=MPHF4FWP4D

And then after a couple days, they will receive an email with instructions on how to login. Using their NetID and password, they need to login which will create the account and the user can be added to the project then by a project's admin.

The name of the project is "WPP Leveraging Project".

Entering the project's profile and setup page, the user will see the following screen which I call:

REDCap [™] Logged in as ahmadijooban Log out	UW Institute for Clinical and Translational Research UNIVERSITY OF WISCONSIN - MADISON WARSHFIELD CLINIC
My Projects Project Home or E Project Setup REDCap Messenger	University of Wisconsin Madison UV Institute for Clinical and Translational Research
Project status: Development Data Collection	WPP Leveraging Project 2
Manage Survey Participants	Revision History
Record Status Dashboard	Project status Development Completed steps 0
Add / Edit Records	Main project settings
Hide data collection instruments General Grant Information Leveraged Source	Disable O Use surveys in this project? Image: Surveys in this project? Not started Image: Surveys in this project? Image: Surveys in this project? Image: Surveys in this project? Image: Surveys in this project? Image: Surveys in this project? Image: Surveys in this project? Image: Surveys in this project? Image: Surveys in this project? Image: Surveys in this project? Image: Surveys in this project? Image: Surveys in this project? Image: Surveys in this project? Image: Surveys in this project? Image: Surveys in this project? Image: Surveys in this project? Image: Surveys in this project? Image: Surveys in this project? Image: Surveys in this project? Image: Surveys in this project? Image: Surveys in this project? Image: Surveys in this project? Image: Surveys in this project? Image: Surveys in this project? Image: Surveys in this project? Image: Surveys in this project? Image: Surveys in this project? Image: Surveys in this project? Image: Surveys in this project? Image: Surveys in this project? Image: Surveys in this project? Image: Surveys in this project? Image: Surveys in this project? Image: Surveys in this project? Image: Surveys in this project? Image: Surveys in this project?
Applications	Modify project title, purpose, etc.
Calendar Ca	Design your data collection instruments & enable your surveys Add or edit fields on your data collection instruments (survey and forms). This may be done either using the Online Designer (online method) or by uploading a Data Dictionary (offline method). You may then enable your instruments to be used as surveys in the Online Design Quick links: Download PDF of all instruments OR Download the current Data Dictionary. to mone! Im done! Im done! Online Designer (or Importance) to Importance Online Designer or Importance to Import the Check For Identifiers Data Dictionary Explore the Importance Import Importance Have you checked the Check For Identifiers Piping Importance Learn how to use Importance Piping Importance Enable optional modules and customizations Enable optional modules and customizations
External Modules	Modify @ Repeatable instruments ?
demo name	Optional Disable O Auto-numbering for records ?
	I'm done! Enable Scheduling module (longitudinal only) ? Enable Randomization module ?
→ → → → → → → → → → → → → → → → → → →	Disable Image: Construction induction inductination induction induction induction inductination induction indu
C Suggest a New Feature	Additional customizations
Contact REDCap administrator	Set up project bookmarks (optional)
	You may create custom bookmarks to webpages that exist inside or outside of REDCap. The bookmarks will be soon as links on the left band project monu and cap be accessed at any ti

Some of the main functionalities are showing in the project setup image above.

Black box (1) on the top left hand side: This section will take you to the project setup, to the list of the projects and to the REDCap Messenger.

Red arrows (2) throughout the image: either of these links that any of those arrows are pointing to, will take the user to the instruments/surveys for editing the instrument itself. This is NOT for data entry!

Green box (3) on the left hand side panel: This link takes the user to the module where they can enter data or modify existing ones.

Pink box (4) on the left hand side panel: This link will take the user to the survey screen where they can see the link and also the list of the participants. Emails to participants can be sent from that module.

Blue box (5) on the left and side panel: This will take you to the import/export modules where the user can either export the data into spreadsheet, or import data through preferably spreadsheet. We use this mainly for bulk uploads for instance the giant ICTR spreadsheet.

Entering/Modifying Records

Manual Data Entry

Click on "Add / Edit Records" on the left hand side menu (Red box number 1 below):

Logged in as ahmadijooban Log out My Projects Project Home or := Project Setup REDCap Messenger Project status: Development	UW Institute for Clinical and Translational Research UNIVERSITY OF WISCONSIN - MADISON MARSHFIELD CLINIC UNIVERSITY OF WISCONSIN MADISON UW Institute for Clinical and Translational Research WPP Leveraging Project	
Data Collection / Edit instruments		
Manage Survey Participants - Get a public survey link or build a participant list for inviting respondents Record Status Dashboard ords	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, button below.	click the
Add / Edit Records	Total records: 17	
Hide data collection instruments A General Grant Information Leveraged Source	Choose an existing Record ID select record V	
Applications	Add new record	
 Calendar Data Exports, Reports, and Stats Data Import Tool Data Comparison Tool Logging Field Comment Log File Repository User Rights and DAGs Record Locking Customization E-signature and Locking Mgmt Caleta Quality API and API Playground REDCap Mobile App External Modules 	Jata Search Choose a field to search (excludes multiple choice fields) Search query Begin typing to search the project data, then click an item in the list to navigate to that record. Image: Point Search Line	
Reports	This project is currently in Development status. Real data should NOT be entered until the project has been moved to Production status.	
1) demo name		
Help & Information		
 Help & FAQ Video Tutorials Suggest a New Feature 		
Contact REDCap administrator		

The screen provides the functionality to either Edit an existing record or add a new one.

Edit an existing record

To edit an existing record, the user can choose the dropdown shown with the blue arrow (2) in image above. This will open a dropdown with ALL the records in database.

Alternatively, one can do a Data search based on certain field and find the record that way.

Add a new record

The user can add a new record manually by clicking the "Add new record" button shown in the image above with the green arrow (3).

After entering/modifying the data, there are a couple options:

	Expa	and
Form Status		
Complete?	⊖ Complete ▼	
Lock this record for this form?		
If locked, no user will be able to edit this record on this form until someone with Lock/Unlock privileges unlocks it.	_{-k} 🔲 🔂 Lock	
	Save & Exit Form Save & Stay 👻	
	Cancel	
	Delete data for THIS FORM only	
	NOTE: To delete the entire record (all forms/events), see the record action drop-down at top of the <u>Record Home Page</u> .	

Save and exit: Saves the changes and exits the form

Save and Stay: Saves and does not exit the screen

There is an arrow beside the "Save and Stay" button that when clicked, it opens more options:

If locked, no user will be able to edit this record on this form until someone with Lock/Unlock privileges unlocks it.	U 📷 LOCK	
	Save & Exit Form	Save & Stay 👻
	Cancel	Save & Go To Next Form Save & Mark Survey as Complete
	Delete data for THIS	Save & Exit Record Save & Go To Next Record
		re record (all forms/events), see the n at top of the <u>Record Home Page</u> .

Data Import

For importing data, the best way is to download the template spreadsheet and fill it out. To see how to fill it out, it is a good idea to go to export module and export one to see how the data is supposed to look like.

After completing the spreadsheet, we import it into the import module which runs a data sanity check and shows the issues to us.

We need to resolve the issues in order to pass and import. That is why downloading the template is so important it saves time and hassle.

Manage Survey Participant

We can reach this module by clicking the "Manage Survey Participant" link on the left hand side panel shown in the image below in the brown box (1):

Manage Survey Participants	University of Wisconsin Madison UW Institute for Clinical and Translational Research WPP Leveraging Project Sam Manage Survey Participants
Data Collection Edit instruments Manage Survey Participants Iist for inviting respondents	
Manage Survey Participants	Manage Survey Participants
Record Status Dashboard - View data collection status of all records Add / Edit Records - Create new records or edit/view existing ones Hide data collection instruments General Grant Information Leveraged Source	Public Survey Link Participant List Survey Invitation Log Using a public survey link is the simplest and fastest way to collect responses for your survey. You may obtain th survey link below to email it to your participants. Responses will be collected anonymously (unless the survey contains questions asking for identifying data from the participants. NOTE: Since this method uses a single surve link for all participants, it allows for the possibility of participants taking the survey multiple times, which may be participant in some cases
Applications	necessary in some cases. To obtain the survey link, copy the URL below and paste it into the body of an email message in your own email
 Calendar Data Exports, Reports, and Stats Data Import Tool Data Comparison Tool Logging Field Comment Log File Repository 	client. Your email recipient(s) can then click the link to begin taking your survey. Public Survey URL: https://redcap.ictr.wisc.edu/surveys/?s=MWLEJYXRLE Custom Public Survey URL: https://is.gd/wpp_demo
 User Rights and A DAGS Record Locking Customization E-signature and Locking Mgmt Data Quality API and A PI Playground REDCap Mobile App External Modules 	Image: Constructions Image: Constructions Image: Constructions Ima
Reports	🚕 Survey Access Code or 鼹 QR Code
) demo name	
lelp & Information	
 e Help & FAQ e Video Tutorials c Suggest a New Feature ∞ Contact REDCap administrator 	

There are a couple important functionalities under this module.

Survey link

The first tab on manage survey participants screen shows all the different ways the survey link can be obtained. Image above shows that screen.

Participants List

The second tab will bring the list of participants (shown in the image below with the red arrow number 1):

REDCap	UW IC1		Translational Resear UNIVERSITY OF WISCONSIN - MAD	ISON				
▲ Logged in as ahmadijooban Log out		17	MARSHFIELD C	LINIC				
 My Projects Project Home or = Project Setu REDCap Messenger 	University of Wisco UW Institute for Clinica	onsin Madison Il and Translational Research						
Project status: Development	WPP Leveragin	a Project						
Data Collection / Edit instrument	-	ig Floject	_ 1					
Manage Survey Participants - Get a public survey link or build a particip	🖧 Manage Sur	vey Participants						
list for inviting respondents Record Status Dashboard - View data collection status of all records	@ Public Survey	y Link 🥵 Participant List	🔄 Survey Invitation Log					
Add / Edit Records - Create new records or edit/view existing Hide data collection instruments - General Grant Information Leveraged Source	ones It is also possible to id must first be enabled	dentify an individual's survey an	tomized email to anyone in your nswers, if desired, by providing an in the table below). More details				ey.	
Applications		of 43 Add participants						K Export list
📆 Calendar 🙀 Data Exports, Reports, and Stats 🚂 Data Import Tool		Record	Participent Identifier (optional)	Responded?	Invitation Scheduled?	Link	Survey Access Code and QR Code	Survey
Data Comparison Tool Solution Data Comparison Tool		ŝ.		۲		68)		:=
S Field Comment Log					-	69	804	:=
File Repository		ä.		۲		69		:=
B User Rights and A DAGs Record Locking Customization					-	68)		:=
E-signature and Locking Mgmt		\$		۲	-	69		:=
Data Quality			3	۷	-	60		:=
			5		-	69		:=
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Each survey has its own list and it can be switched from the dropdown shown in the green box number 2. It is not much important until a correspondence is being sent out.

Compose Survey Invitation

In this case, we have to choose "Leveraged Source" and click the button "Compose Survey Invitation" (purple arrow number 3 from the image above) which opens up the following screen:

Send a Survey Invitation to Participants							(x
Info Survey title: Leveraged Source		rticipant List ose who have *and* have not responded)		check/un	check pa	articipants	¥	
When should the emails be sent? The sent sector of the sent sector of the sec		Email (6 selected)	Participant Identifier	Scheduled?	Sent?	Respon ded?		
Immediately At specified time:				-		۲		
The time must be for the time zone America/Chicago, in which the current time is 06/14/2019 06:59.				-				
Enable reminders Re-send invitation as a reminder if participant has not responded by a				-		۲		
specified time?				-				
✓ Compose message From: ahmadijooban@wisc.edu	\$			-		۲		
To: [All participants selected from Participant List]				-				
Subject:				-		۷		
Compose Preview Send test email				-		۷		
[survey-queue-link] 2				-		۷		
If the link above does not work try copying the link below into your				-				
web_browser: [survey-queue-ur]] This link is unique to you and should not be forwarded to others.	3		4					
ONOTE: You may modify or remove any text you wish in the Compose Message text box above. Make sure you include either [survey-link] or [survey-url] in the text or else the participant will not have a way to take the survey.								
You may use HTML formatting in the email message: bold, <u> underline, <i> italics, link, etc.</i></u>								
How to use Piping in the survey invitation				\boldsymbol{Z}				
				Send Ir	ivitatio	ons	ancel	

The from email does not work properly. The email is being sent by noreply@questdiagnostics.com.

In the text, make sure to change the survey-link to survey-queue-link and survey-url to survey-queue-url (as shown in the two blue boxes number 2 above number).

The emails can be chosen by checking the checkboxes beside them in green box (3) above.

If everything looks good, then click the "Send Invitation" button to send it. Because we changed the survey-url to survey-queue-url, we will see the following warning popping up:

Send a Survey Invitation to	o Participants								×
Survey title: Leveraged Source			rticipant l	L ist e *and* have not responded)		check/unc	heck pa	articipants	v
(B) When should the emails be sent?	,			(1 selected)	Participant Identifier	Scheduled?	Sent?	Respon ded?	
Immediately At specified time:	51 🕑 M/D/Y H:M		1) ahmac , #1 - nhi)	dijooban@wisc.edu (ID 309				۲	
The time must be for the time zone America 06/14/2019 06:59.	/Chicago, in which the current time is		2) ahmad , #570 - B	dijooban@wisc.edu(ID 309 enefit Auctions)					
 Enable reminders Re-send invitation as a reminder if 	participant has not responded by a			dijooban@wisc.edu (ID 309 dividual and Buisness Dona		• 2			
specified time?				dijooban@wisc.edu (ID 309					
Compose message	NOTICE: Invitation text is m Your survey invitation text appears to		51		be inserted	•		۲	
To: [All participants selected fi	into the invitation text as either [surve your invitation, participants will not be	y-link] or [surve	y-url]. W hout a link to th	ie survey in				
Subject:	highly recommended that you add the you truly do not want the survey link t	e [sur\	/ey-link] va	ariable to your invitation t	ext, unless			۲	
Compose Preview	to auto-add the survey link to the invit				,			۲	
below: [survey-queue-link]	Add [survey-	link]	to text	Leave as is with no	survey link	•			
If the link above does not work, try c web browser: [survey-queue-ur]] This link is unique to you and should	not be forwarded to others.								
O NOTE: You may modify or remove any text box above. Make sure you include either [su the participant will not have a way to take th	rvey-link] or [survey-url] in the text or else								
You may use HTML formatting in the email n italics, link, etc.	nessage: bold, <u> underline, <i></i></u>								
How to use Piping in the survey invitation									
						Send In	vitatio	ons Ca	incel

Click the "Leave as id with no survey link" button (red arrow number 1) and if the popup keeps appearing, then click on the "x" button on top (shown with green arrow number 2). And if all goes well, the following popup appears:

