

# 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:

Status	Survey Title
✓ Completed	All surveys in your queue have been completed! <a href="#">(view all)</a>

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

Close survey queue

Survey Queue

Get link to my survey queue

Listed below is your survey queue, which lists any other surveys that you have not yet completed. To begin the next survey, click the 'Begin survey' button next to the title.

Status	Survey Title	
✓ 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	Edit response
✓ Completed	Leverage Sources – #585: CATCH Grant	Edit response
✓ Completed	Leverage Sources – #590: CHSP Grant & Reilly Baldwin Grant	Edit response
✓ Completed		<div> <div>+</div> <div>Take this survey again</div> </div>

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:

The screenshot displays the REDCap project setup page. The left-hand navigation menu includes sections like 'My Projects', 'Data Collection', 'Applications', 'Reports', and 'Help & Information'. The main content area shows 'Main project settings', 'Design your data collection instruments & enable your surveys', 'Enable optional modules and customizations', and 'Set up project bookmarks (optional)'. Red annotations highlight specific navigation points: a black box (1) around the top navigation links, a red arrow (2) pointing to 'Add / Edit Records', a green box (3) around 'Manage Survey Participants', a pink box (4) around 'Data Exports, Reports, and Stats', and a blue box (5) around 'Online Designer'.

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):

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:

Expand


**Form Status**

**Complete?**

Complete ▼

**Lock this record for this form?**

 **Lock**

If locked, no user will be able to edit this record on this form until someone with Lock/Unlock privileges unlocks it.

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 [Record Home Page](#).

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.

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 [Record Home Page](#).

Save & Go To Next Form  
 Save & Mark Survey as Complete  
 Save & Exit Record  
 Save & Go To Next Record

## 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):



Logged in as **ahmadijooan** | [Log out](#)

[My Projects](#)  
[Project Home](#) or [Project Setup](#)  
[REDCap Messenger](#)  
Project status: **Development**

Data Collection

Manage Survey Participants

Record Status Dashboard

Add / Edit Records

General Grant Information

Leveraged Source

Applications

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

Data Quality

API and API Playground

REDCap Mobile App

External Modules

Reports

1) demo name

Help & Information

Help & FAQ

Video Tutorials

Suggest a New Feature

Contact REDCap administrator

UW Institute for Clinical and Translational Research

UW ICTR

UNIVERSITY OF WISCONSIN - MADISON  
MARSHFIELD CLINIC

University of Wisconsin -- Madison  
UW Institute for Clinical and Translational Research

WPP Leveraging Project

Manage Survey Participants

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 the 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 participant). **NOTE:** Since this method uses a single survey link for all participants, it allows for the possibility of participants taking the survey multiple times, which may be 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 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

Link Actions

Link Customizations

Open public survey

Open public survey + Log out

Send me URL via email

Survey Access Code or QR Code

Get Short Survey Link

Create Custom Survey Link

Get Embed Code

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):

1

2

3

4

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:





