

REDCap Leverages Import

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A summary of the process

A REDCap project with title of "WPP Leveraging Project" has been created to keep track of leveraged sources.

The project consists of two instruments: one survey and one internal data collection form called "General Grant Information"

The survey is a repeatable instrument linked to the internal data collection form.

The General Grant Information is holding only the main information of the grant and is being filled by WPP internal staff. Therefore, it is recommended that data entry here is done on a regular basis. This step requires REDCap access that can be requested through the following link:

[REDCap Account Request Form](#)

When data entry done, then a queue is available for the repeatable survey that can be either filled externally or internally. There is a field in Blackbaud request module that holds the URL of the survey queue. The link has to be manually copied from REDCap and pasted into that field in Blackbaud. This way, the URL is available to be communicated to grantees and they can take care of it themselves if WPP decides to make that decision.

It is recommended data entry to be processed through one of the following ways only:

Batch data import

Manually entering data

Batch Data Import

Open the template file in the following N drive folder:

"N:\ADMIN\WI Partnership Program\Tools\Leveraged Sources Project\Leveraged_Sources_Project_Template.csv"

The following columns have to be filled as instructed each below:

record_id	redcap_repe at_instrument	redcap_rep eat_instance	redcap_data_ access_group	grant_id	bbgm_project_title	contact_name	participant_email	any_lever aged_funds	general_grant_info rmation_complete
This is the Reference Number of the Request	(leave this empty)	(leave this empty)	(leave this empty)	This is the Reference Number of the Request	This is the Project Title of the Request	Name of the contact on the request	email of the contact on the request	(leave this empty)	2 (always enter 2 for complete)

After this is saved, upload it to the REDCap import tool and data will be available.

Manually entering data

This task requires REDCap access that can be requested through the following link:

[REDCap Account Request Form](#)

Login to REDCap:

<https://redcap.ictr.wisc.edu/>

Go to My Projects from the top menu (if you don't see them on your screen)

Choose "WPP Leveraging Project":

redcap.ictr.wisc.edu/index.php?action=myprojects

My Projects

To request an ICTR REDCap account, please complete the following survey: [New ICTR REDCap Account Request](#)

Listed below are the REDCap projects to which you currently have access. Click the project title to open the project. [Read more](#) To review which users still have access to your projects, visit the [User Access Dashboard](#).

Project Title	Records	Fields	Instrument	Type	Status
WPP Leveraging Project	490	22	2 surveys	■	✓
BBGM temporary Data store	508	33	1 form	■	✎
Final Opioid Supplemental Report	13	64	3 surveys	■	✎
WPP Dissemination	6,859	7	1 form	■	✎

The projects listed below are public and are accessible by anyone. No authentication (i.e. username/password) is required to access them directly.

Public Projects
Example Survey
REDCap Demo Database
REDCap Demo Database (Longitudinal) - Drug Trial

REDCap 9.3.6 - © 2020 Vanderbilt University

On the left hand side menu, choose "Add/ Edit Records"

The choose "Add new Record"

REDCap

Logged in as ahmadjjooban | Log out

My Projects
REDCap Messenger

Project Home and Design

Data Collection

Survey Distribution Tools

Record Status Dashboard

Add / Edit Records

Leveraged Source

Applications

Alerts & Notifications
Calendar
Data Exports, Reports, and Stats
Data Import Tool
Data Comparison Tool
Logging
Field Comment Log
File Repository
User Rights and DAGs
Customize & Manage Locking/E-signatures
Data Quality
API and API Playground
REDCap Mobile App
External Modules

Help & Information

Help & FAQ
Video Tutorials
Suggest a New Feature

Contact REDCap administrator

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WPP Leveraging Project

Add / Edit Records

You may view an existing record/response by selecting it from the drop-down lists below. To create a new record/response, click the button below.

Total records: 490

Choose an existing Record ID

Select Record

+ Add new record

Data Search

Choose a field to search
(excludes multiple choice fields)

All fields

Search query

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

Under Data Collection Instruments, choose "General Grant Information"

REDCap®

Logged in as **ahmadiljooban** | Log out

My Projects
REDCap Messenger

Project Home and Design

Project Home · Project Setup
Designer · Dictionary · Codebook
Project status: **Production**

Data Collection

Survey Distribution Tools
Record Status Dashboard
Add / Edit Records

Record ID 4438 [Select other record](#)

General Grant Information
Leveraged Source

Applications

Alerts & Notifications
Calendar
Data Exports, Reports, and Stats
Data Import Tool
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WPP Leveraging Project

Record Home Page

Record "4438" is a new Record ID. To create the record and begin entering data for it, click any gray status icon below.

The grid below displays the form-by-form progress of data entered for the currently selected record. You may click on the colored status icons to access that form/event.

Legend for status icons:

- Incomplete
- Unverified
- Complete
- Many statuses (mixed)
- Incomplete (no data saved) ?
- Partial Survey Response
- Completed Survey Response
- Many statuses (all same)

NEW Record ID 4438

Data Collection Instrument	Status
General Grant Information (survey)	
Leveraged Source (survey)	

Fill all the fields except for "Does the grant have any leveraged funds?"

From the complete? dropdown choose "Complete"

Save and Exit Form

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WPP Leveraging Project

Actions: Download PDF of instrument(s) Share instrument in the Library VIDEO: Basic data entry

General Grant Information

Assign record to a Data Access Group? -- select a group --

Adding new Record ID 4438

Record ID 4438

Grant Number

BBGM Project Title

Primary Contact Name

Primary Contact Email

Does the grant have any leveraged funds? Yes No reset

Form Status

Complete? Incomplete Incomplete Unverified 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.

Save & Exit Form Save & Stay -- Cancel --

The REDCap Consortium | Citing REDCap | https://ictr.wisc.edu
 University of Wisconsin -- Madison

After all entries have been processed and saved successfully, from the left hand side menu panel choose "Survey Distribution Tools"

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WPP Leveraging Project

Survey Distribution Tools

Public Survey Link Participant List Survey Invitation Log

The Participant List option allows you to send a customized email to anyone in your list and track who responds to your survey. It is also possible to identify an individual's survey answers, if desired, by providing an identifier for each participant (this feature must first be enabled by clicking the "Enable" button in the table below). Note: All survey responses collected are considered anonymous unless you 1) are using Participant Identifiers or 2) have enabled the designated email field for invitations. [More details](#)

Participant List belonging to [Initial survey] "General Grant Information"

Remove all participants

Export list

Email	Record	Participant Identifier (optional)	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code	Survey Queue
51-100	4324							
101-150	2593							
151-200	4326							
201-250	4358							
251-300	2470							
301-350	269							
351-400	1002							
401-450	4140							
451-490	1							
	4395							
	2960							
	569							
	597							
	598							
	1692							
	2486							

Entering Queue Link into Blackbaud Grantmaking

Click the second tab "Participant List"

From Displaying dropdown choose "-- ALL --"

Click the "Export List" button

In the exported spreadsheet, find your entered data by grant id and then look at the Survey Queue Link column

	A	B	C	D	E	F	G	H	I
1	Email	Add Participant	Record	Invitation	Response	Survey ID	Survey Queue Link		
2			4324	No	No	X7YL3W9Y	https://redcap.ictr.wisc.edu/surveys/?sq=Rkv3V3tHDV		
3			2593	No	No	A3C7HKY6	https://redcap.ictr.wisc.edu/surveys/?sq=xP45zWV67f		
4			4326	No	No	LXN4EFAA	https://redcap.ictr.wisc.edu/surveys/?sq=9YKTDwezyW		
5			4358	No	No	WKJTJD8	https://redcap.ictr.wisc.edu/surveys/?sq=IUvQmmpJn		
6			2470	No	No	TL7TJK48	https://redcap.ictr.wisc.edu/surveys/?sq=VEGCusinWR		
7			269	No	No	NCA9FHC	https://redcap.ictr.wisc.edu/surveys/?sq=3QJQbc3boL		
8			1002	No	No	KPL9XTN	https://redcap.ictr.wisc.edu/surveys/?sq=V6zzQYtEMp		
9			4140	No	No	DH778EK	https://redcap.ictr.wisc.edu/surveys/?sq=H7sznC2e4E		
10			1	No	No	AYEA4RX	https://redcap.ictr.wisc.edu/surveys/?sq=QPxFDTHmt		
11			4295	No	No	8JFT8D9P	https://redcap.ictr.wisc.edu/surveys/?sq=pG5V4vrqHn		
12			2560	No	No	N4TP8W9	https://redcap.ictr.wisc.edu/surveys/?sq=g4DHQ2sf5p		
13			569	No	No	9RAMEPN	https://redcap.ictr.wisc.edu/surveys/?sq=7CYvXsCJI5		
14			597	No	No	74HFM9P	https://redcap.ictr.wisc.edu/surveys/?sq=BmNNGyDazB		
15			598	No	No	A7XXM7R	https://redcap.ictr.wisc.edu/surveys/?sq=UeN7KjKoC		
16			1692	No	No	RYPNH97	https://redcap.ictr.wisc.edu/surveys/?sq=JTKYUj8fSm		
17			2486	No	No	4FT4LYAD	https://redcap.ictr.wisc.edu/surveys/?sq=VfruezJF6N		
18			423	No	No	EAC7WTL	https://redcap.ictr.wisc.edu/surveys/?sq=HyynJKSShB		
19			2021	No	No	KTTCA8H	https://redcap.ictr.wisc.edu/surveys/?sq=XqBIKMIDpg		
20			290	No	No	777PACM	https://redcap.ictr.wisc.edu/surveys/?sq=fLTKww7hiZ		
21			3240	No	No	MHFLNRH	https://redcap.ictr.wisc.edu/surveys/?sq=X3dRq3gHpY		
22			1298	No	No	WM39KD	https://redcap.ictr.wisc.edu/surveys/?sq=FTXUmfzvfY		
23			2006	No	No	J74TWVK	https://redcap.ictr.wisc.edu/surveys/?sq=NJMACHGheC		
24			2563	No	No	84NTAHD	https://redcap.ictr.wisc.edu/surveys/?sq=okdJAg5eUy		
25			2294	No	No	8MTW7EJ	https://redcap.ictr.wisc.edu/surveys/?sq=TJdJq3qiWK		
26			2275	No	No	3PHE7H4	https://redcap.ictr.wisc.edu/surveys/?sq=3a8STRUKDi		
27			3100	No	No	E7JYJHXN	https://redcap.ictr.wisc.edu/surveys/?sq=ggU9WmjQmV		
28			1631	No	No	K4XTH4N	https://redcap.ictr.wisc.edu/surveys/?sq=9euhTqz7Pd		
29			806	No	No	NPNFK8R	https://redcap.ictr.wisc.edu/surveys/?sq=2cLWeADDJZ		
30			2278	No	No	XXCWN8T	https://redcap.ictr.wisc.edu/surveys/?sq=o5Hjkwu5pj		
31			2596	No	No	LFX TAL7D	https://redcap.ictr.wisc.edu/surveys/?sq=IGadJL9QaF		
32			2277	No	No	KHCFL8LK	https://redcap.ictr.wisc.edu/surveys/?sq=qDKy6LPgHZ		
33			4189	No	No	93A8MP4	https://redcap.ictr.wisc.edu/surveys/?sq=X4jwdzdTvA		
34			1074	No	No	3AT7F4FL	https://redcap.ictr.wisc.edu/surveys/?sq=dnEzmuXbn7		
35			4288	No	No	CYCHAHP	https://redcap.ictr.wisc.edu/surveys/?sq=AoJfmbzbxpP		
36			4360	No	No	MXKXPN	https://redcap.ictr.wisc.edu/surveys/?sq=Mtid2thuBf		
37			2000	No	No	NNW7DP	https://redcap.ictr.wisc.edu/surveys/?sq=7FRKCPHXKJ		
38			4016	No	No	PKRNYTY	https://redcap.ictr.wisc.edu/surveys/?sq=FzJffIzdQw		
39			7799	No	No	9Y18DDT			

Open Blackbaud Grantmaking and search for those grants and open them one by one. Copy the URL from the spreadsheet into "Leveraged Sources List URL" field under "Evaluation" section in Request module.

Evaluation

Evaluation

Leveraged Sources List URL