

# 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_repeat_instrument | redcap_repeat_instance | redcap_data_access_group | grant_id                                    | bbgm_project_title                       | contact_name                       | participant_email                   | any_leveraged_funds | general_grant_information_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

MyUW Jira JIRA DEV Wisconsin Partners... WISDM REDCap Confluence Qlik Dev Qlik Prod Webex Meetings temp Blackbaud System S... Dashboard | WISER Category Topics - BL...

**REDCap** Home **My Projects** New Project Help & FAQ Training Videos Send-It Messenger

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](#).

**My Projects** [Organize](#) Filter projects by title

| Project Title                    | Records | Fields | Instrument | Type | Status |
|----------------------------------|---------|--------|------------|------|--------|
| <b>WPP Leveraging Project</b>    | 490     | 22     | 2 surveys  | ■    | ✓      |
| B8GM 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**

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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**
- Hide data collection instruments
- 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"

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**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](#)  
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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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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](#)

Data Collection Instruments:

**General Grant Information**

Leveraged Source

**Applications**

Alerts & Notifications

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Data Exports, Reports, and Stats

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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>

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

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My Projects

REDCap Messenger

**Project Home and Design**

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Project status: **Production**

**Data Collection**

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"](#)

Display: [1 - 50](#) of 490 [Add participants](#) [Compose Survey Invitations](#) [Remove all participants](#) [Export list](#)

| Email   | Record | Participant Identifier (optional) | Responded? | Invitation Scheduled? | Invitation Sent? | Link | Survey Access Code and QR Code | Survey Queue |
|---------|--------|-----------------------------------|------------|-----------------------|------------------|------|--------------------------------|--------------|
| 1-50    |        |                                   |            |                       |                  |      |                                |              |
| 51-100  |        |                                   |            |                       |                  |      |                                |              |
| 101-150 |        |                                   |            |                       |                  |      |                                |              |
| 151-200 |        |                                   |            |                       |                  |      |                                |              |
| 201-250 |        |                                   |            |                       |                  |      |                                |              |
| 251-300 |        |                                   |            |                       |                  |      |                                |              |
| 301-350 |        |                                   |            |                       |                  |      |                                |              |
| 351-400 |        |                                   |            |                       |                  |      |                                |              |
| 401-450 |        |                                   |            |                       |                  |      |                                |              |
| 451-490 |        |                                   |            |                       |                  |      |                                |              |
|         | 4324   |                                   |            |                       |                  |      |                                |              |
|         | 2593   |                                   |            |                       |                  |      |                                |              |
|         | 4326   |                                   |            |                       |                  |      |                                |              |
|         | 4358   |                                   |            |                       |                  |      |                                |              |
|         | 2470   |                                   |            |                       |                  |      |                                |              |
|         | 269    |                                   |            |                       |                  |      |                                |              |
|         | 1002   |                                   |            |                       |                  |      |                                |              |
|         | 4140   |                                   |            |                       |                  |      |                                |              |
|         | 1      |                                   |            |                       |                  |      |                                |              |
|         | 4395   |                                   |            |                       |                  |      |                                |              |
|         | 2560   |                                   |            |                       |                  |      |                                |              |
|         | 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   | Survey Lin | Survey Queue Link                                   |   |
| 2  |           |             | 4324   | No         | No       | X7YL3W9Y | https://re | https://redcap.ictr.wisc.edu/surveys/?sq=Rkv3V3tHDV |   |
| 3  |           |             | 2593   | No         | No       | A3C7HKY6 | https://re | https://redcap.ictr.wisc.edu/surveys/?sq=xP45zWV67f |   |
| 4  |           |             | 4326   | No         | No       | LXN4EFA  | https://re | https://redcap.ictr.wisc.edu/surveys/?sq=9YKTDwezyW |   |
| 5  |           |             | 4358   | No         | No       | WKJTDDJ  | https://re | https://redcap.ictr.wisc.edu/surveys/?sq=IUvQMmgpJn |   |
| 6  |           |             | 2470   | No         | No       | TL7TJK48 | https://re | https://redcap.ictr.wisc.edu/surveys/?sq=VEGCusinWR |   |
| 7  |           |             | 269    | No         | No       | NCA9FHC  | https://re | https://redcap.ictr.wisc.edu/surveys/?sq=3qJQbc3boL |   |
| 8  |           |             | 1002   | No         | No       | KPL9XTN  | https://re | https://redcap.ictr.wisc.edu/surveys/?sq=V6zzQYtEMp |   |
| 9  |           |             | 4140   | No         | No       | DH778EK  | https://re | https://redcap.ictr.wisc.edu/surveys/?sq=H7sZnC2e4E |   |
| 10 |           |             | 1      | No         | No       | AYEA4RX  | https://re | https://redcap.ictr.wisc.edu/surveys/?sq=QPXgFDTHmt |   |
| 11 |           |             | 4295   | No         | No       | 8JFT8D9P | https://re | https://redcap.ictr.wisc.edu/surveys/?sq=pG5V4vrqHn |   |
| 12 |           |             | 2560   | No         | No       | N4TP8W9  | https://re | https://redcap.ictr.wisc.edu/surveys/?sq=g4DHq2sf5p |   |
| 13 |           |             | 569    | No         | No       | 9RAMEPN  | https://re | https://redcap.ictr.wisc.edu/surveys/?sq=7CYvXsCJI5 |   |
| 14 |           |             | 597    | No         | No       | 74HFM9P  | https://re | https://redcap.ictr.wisc.edu/surveys/?sq=BmNNGyDazB |   |
| 15 |           |             | 598    | No         | No       | A7XXM7R  | https://re | https://redcap.ictr.wisc.edu/surveys/?sq=UeN7KjKoC  |   |
| 16 |           |             | 1692   | No         | No       | RYPNH97  | https://re | https://redcap.ictr.wisc.edu/surveys/?sq=JKYUj8fSm  |   |
| 17 |           |             | 2486   | No         | No       | 4FT4LYAD | https://re | https://redcap.ictr.wisc.edu/surveys/?sq=VfruezJF6N |   |
| 18 |           |             | 423    | No         | No       | EAC7WTL  | https://re | https://redcap.ictr.wisc.edu/surveys/?sq=HyynJKSShB |   |
| 19 |           |             | 2021   | No         | No       | KTTCA8H  | https://re | https://redcap.ictr.wisc.edu/surveys/?sq=XqBIKMIDpg |   |
| 20 |           |             | 290    | No         | No       | 777PACM  | https://re | https://redcap.ictr.wisc.edu/surveys/?sq=fLTkww7hiZ |   |
| 21 |           |             | 3240   | No         | No       | MHFLNRH  | https://re | https://redcap.ictr.wisc.edu/surveys/?sq=X3dRq3gHpY |   |
| 22 |           |             | 1298   | No         | No       | WM39KD   | https://re | https://redcap.ictr.wisc.edu/surveys/?sq=FtXUmfzvyf |   |
| 23 |           |             | 2006   | No         | No       | J74TWVK  | https://re | https://redcap.ictr.wisc.edu/surveys/?sq=NJMAchGheC |   |
| 24 |           |             | 2563   | No         | No       | 84NTAHD  | https://re | https://redcap.ictr.wisc.edu/surveys/?sq=okdJAg5eUy |   |
| 25 |           |             | 2294   | No         | No       | 8MTW7EJ  | https://re | https://redcap.ictr.wisc.edu/surveys/?sq=TJdqJ3qiWK |   |
| 26 |           |             | 2275   | No         | No       | 3PHE7H4  | https://re | https://redcap.ictr.wisc.edu/surveys/?sq=3a8STrUKDi |   |
| 27 |           |             | 3100   | No         | No       | E7JYJHXN | https://re | https://redcap.ictr.wisc.edu/surveys/?sq=ggU9WmjQmV |   |
| 28 |           |             | 1631   | No         | No       | K4XTH4N  | https://re | https://redcap.ictr.wisc.edu/surveys/?sq=9euhTqz7Pd |   |
| 29 |           |             | 806    | No         | No       | NPNFK8R  | https://re | https://redcap.ictr.wisc.edu/surveys/?sq=2cLWeADDJZ |   |
| 30 |           |             | 2278   | No         | No       | XXCWN8T  | https://re | https://redcap.ictr.wisc.edu/surveys/?sq=o5Hjkwu5pj |   |
| 31 |           |             | 2596   | No         | No       | LFXTAL7D | https://re | https://redcap.ictr.wisc.edu/surveys/?sq=IGadJL9QaF |   |
| 32 |           |             | 2277   | No         | No       | KHCFL8LK | https://re | https://redcap.ictr.wisc.edu/surveys/?sq=qDKy6LPgHZ |   |
| 33 |           |             | 4189   | No         | No       | 93A8MP4  | https://re | https://redcap.ictr.wisc.edu/surveys/?sq=X4jwdzdTvA |   |
| 34 |           |             | 1074   | No         | No       | 3AT7F4FL | https://re | https://redcap.ictr.wisc.edu/surveys/?sq=dnEzmuXbn7 |   |
| 35 |           |             | 4288   | No         | No       | CYCHAHP  | https://re | https://redcap.ictr.wisc.edu/surveys/?sq=AoJfmzbxpP |   |
| 36 |           |             | 4360   | No         | No       | MXKXPN   | https://re | https://redcap.ictr.wisc.edu/surveys/?sq=Mtid2thuBf |   |
| 37 |           |             | 2000   | No         | No       | NNW7DP   | https://re | https://redcap.ictr.wisc.edu/surveys/?sq=7FRKCPHXKJ |   |
| 38 |           |             | 4016   | No         | No       | PKRNYTY  | https://re | https://redcap.ictr.wisc.edu/surveys/?sq=FzJfFlzdQw |   |
| 39 |           |             | 7799   | No         | No       | 9YX8DDT  | https://re | https://redcap.ictr.wisc.edu/surveys/?sq=...        |   |

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                 | <input type="text"/> |
| Leveraged Sources List URL | <input type="text"/> |