

# Creating Records and Entering Data

## Select a project

Click the "My Projects" tab. All projects that you have access to will appear in the list. Click the appropriate project.

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

**Welcome to REDCap!**

REDCap is a mature, secure web application for building and managing online surveys and databases. Using REDCap's stream-lined process for rapidly developing projects, you may create and design projects using 1) the online method from your web browser using the Online Designer; and/or 2) the offline method by constructing a "data dictionary" template file in Microsoft Excel, which can be later uploaded into REDCap. Both surveys and databases (or a mixture of the two) can be built using these methods.

REDCap provides automated export procedures for seamless data downloads to Excel and common statistical packages (SPSS, SAS, Stata, R), as well as a built-in project calendar, a scheduling module, ad hoc reporting tools, and advanced features, such as branching logic, file uploading, and calculated fields.

Learn more about REDCap by watching a [brief summary video \(4 min\)](#). If you would like to view other quick video tutorials of REDCap in action and an overview of its features, please see the [Training Resources](#) page.

**NOTICE:** If you are collecting data for the purposes of human subjects research, review and approval of the project is required by your Institutional Review Board.

If you require assistance or have any questions about REDCap, please contact [REDCap Administrator](#).

## Creating a record

Subjects / participants have a single record, identified by the first variable on the first form (record or study ID). A record may be associated with multiple events (data collection time points), and each event can contain multiple forms (instruments). For longitudinal studies, a single form (instrument) may be used across multiple events. Ad hoc forms (instruments) can also be used multiple times within the same event and are linked to the participant record.

For patient screening, click "Add/Edit Records" from the left-hand "Data Collection" menu, then click "add new record". A screening ID will be created automatically. If data access groups (DAG) are being used, and you have access to more than one DAG, ensure to select the correct DAG with the DAG switcher.

Logged in as cdor005 | Log out

My Projects  
Project Home or Project Setup  
REDCap Messenger

Project status: Production

**Data Collection**

- Manage Survey Participants
- Record Status Dashboard
- Add / Edit Records**

Show data collection instruments

**Applications**

- Calendar
- Data Exports, Reports, and Stats
- Data Import Tool
- Data Comparison Tool
- Logging
- Field Comment Log
- File Repository

Project Home Project Setup Other Functionality Project Revision History

**Quick Tasks**

- Codebook: The Codebook is a human-readable, read-only version of the project's Data Dictionary and serves as a quick reference for viewing field attributes.
- Manage Survey Participants: Invite participants to complete your survey by emailing a public survey link or building a participant list for batch notification.
- Export data: Export your data from REDCap to open or view in Excel or various stats packages.
- Create a report: Build custom reports for quick views of your data, and export reports to Excel/CSV.
- Check data quality: Build or execute data quality rules to find discrepancies and errors in your project data.
- User Rights: Grant new users access to this project or modify user privileges for current users.
- Online Designer and Data Dictionary Upload: Create new fields/questions on your data collection instruments or modify existing ones using the Online Designer or by uploading a Data Dictionary. Quick link: [Download the current Data Dictionary](#)
- Copy this project: Create an exact duplicate of this project, which copies over all data collection instruments, any surveys that exist, as well as the option to copy all users and reports to the new project.
- Data Access Groups: Create groups of users to limit user access to certain records/responses, in which only users within a given Data Access Group can access records created by users within that group.

In the trial database, click "import" on the Project Home tab. This will import all patients who have been randomised and automatically create new records with study ID (randomisation number).

Project Home Project Setup Other Functionality Project Revision History Edit project settings

Click on the **Import** button to import new randomised participants **Import**

## Entering data

Data forms (instruments) can be accessed in two ways:

- 1) Click the "Record Status Dashboard" from the left-hand "Data Collection" menu. Click either the study ID or the data form icon to go to the data entry form.
- 2) Click "Add/Edit Records" from the left-hand "Data Collection" menu. Select the correct record from the "Choose an existing Study ID" drop-down menu.

**Record Status Dashboard (all records)**

Displayed below is a table listing all existing records/responses and their status for every data collection instrument (and if longitudinal, for every event). You may click any of the colored buttons in the table to open a new tab/window in your browser to view that record on that particular data collection instrument. Please note that if your form-level user privileges are restricted for certain data collection instruments, you will only be able to view those instruments, and if you belong to a Data Access Group, you will only be able to view records that belong to your group.

Dashboard displayed: [Default dashboard] [Create custom dashboard](#)

Displaying record Page 1 of 5: "179180.0006" through "179180.0" of 406 records 100 records per page

Displaying: Instrument status only | [Lock status only](#) | [All status types](#)

Study ID	Baseline		9M			12M							
	Demography	Tracking	Survey activation	Infant Feeding History 9M	Infant Food Frequency_V2	Infant Feeding History 12M	Development 12M	Child Eating Behaviour	Infant Food Frequency_V2	CAT 12M	Anthropometry 12M	ASQ 14M	ASQ 16M
179180.0006													
179180.0010													
179180.0012													
179180.0013													
179180.0014													

**Legend for status icons:**

- Incomplete
- Incomplete (no data saved) ?
- Unverified
- Partial Survey Response
- Complete
- Completed Survey Response

**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, type a new value in the text box below and hit Tab or Enter. To quickly find a record without using the drop-downs, the text box will auto-populate with existing record names as you begin to type in it, allowing you to select it.

Total records: 406

Choose an existing Study ID

Enter a new or existing Study ID

**Data 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.

Remember to save the page after entering data by clicking one of the buttons below. "Save & Stay" saves data and allows you stay on the current page.

**Form Status**

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.

Consult your study data management SOPs for use of the form status and locking functions for your trial.