

Scientific Computing and Data Services

REDCap Essentials

<https://redcap.mountsinai.org>

Cate Bauer-Martinez
Senior REDCap Analyst
Scientific Computing and Data
Services



Icahn
School of
Medicine at
**Mount
Sinai**

Introduction – Team Members



Patricia Kovatch

Professor and Dean for
Scientific Computing
and Data



Ranjini Kottaiyan

Senior Director



Farhan Mahmood

Director, Scientific
Computing



Eric Rosenberg

System Administrator



Rupan Hossain

Database Administrator



Rajendra Bose

Director, Researcher
Engagement



Priscilla Acquaye

REDCap Analyst



Cate Bauer-Martinez

Senior REDCap Analyst



Jing Yang, PhD

Applications Support Analyst

Acknowledgements



Acknowledge CTSA:

An acknowledgement of support from the Icahn School of Medicine at Mount Sinai and the Clinical and Translational Science Awards (CTSA) grant UL1TR004419 from the National Center for Advancing Translational Sciences should appear in a publication of any material, whether copyrighted or not, based on or developed with Mount Sinai-supported computing resources including REDCap:

Please use the following acknowledgement in your publications:

“This work was supported in part through the computational and data resources and staff expertise provided by Scientific Computing and Data at the Icahn School of Medicine at Mount Sinai and supported by the Clinical and Translational Science Awards (CTSA) grant ULTR004419 from the National Center for Advancing Translational Sciences.”

Acknowledge Scientific Computing and Data:

All publications must include the following language in the acknowledgments section:

“This work was supported in part through the resources and staff expertise provided by Scientific Computing and Data at the Icahn School of Medicine at Mount Sinai.”

Welcome to REDCap!

- REDCap is a secure web platform for building and managing online databases and surveys. REDCap's streamlined process for rapidly creating and designing projects offers a vast array of tools that can be tailored to virtually any data collection strategy.



Agenda

- **REDCap Account Management for internal and external collaborators**
- **Development vs Production**
- **Project Ownership and User Rights**
- **Orphaned projects and transferring ownership**
- **Resources**



REDCap Account Management

All users must have a REDCap account

- All REDCap accounts require **Mount Sinai credentials**
- REDCap accounts = Mount Sinai credentials
- Username and password
- **NOTE:** We cannot reset passwords - > REDCap require Mount Sinai credentials

Please log in with your user name and password. If you are having trouble logging in, please contact [Mount Sinai REDCap Support](#).

Username:	<input type="text"/>
Password:	<input type="password"/>

[Forgot your password?](#)

Types of accounts

- Internal accounts
- External accounts

How do I obtain a REDCap account?

Internal collaborators

All Mount Sinai users must have a REDCap account
Mount Sinai or Icahn School of Medicine employee

- Log in with your Mount Sinai credentials
- Username
- Password
- On your first login, verify your email

✓ Verify your email address
Your email address has been confirmed.



Please log in with your user name and password. If you are having trouble logging in, please contact [Mount Sinai REDCap Support](#).

Username:

Password:

Log In

[Forgot your password?](#)

How do I obtain a REDCap account?

External collaborator

All external users must have Mount Sinai credentials



PI or other sponsor/delegate must request on behalf of external collaborator

- ▶ Through **Sailpoint**, request a Non-Employee account (**External Researcher**)
- ▶ Once approved, the PI will receive an email notification informing them that the SailPoint request is complete. This email will contain a Mount Sinai username and password for the collaborator.
- ▶ Share Mount Sinai username and password with the external collaborator

Multi step process



How do I obtain a REDCap account?

External collaborator

Sailpoint interface

The screenshot displays the SailPoint user interface. At the top, the 'SailPoint' logo is on the left, and a 'Help' button is on the right. Below the logo, a navigation bar contains a hamburger menu icon, the text 'Home', and a dropdown menu labeled 'My Work'. A notification bell icon with a red '1' is positioned on the far right of this bar. The main content area is titled 'Form' with a back arrow icon. Below the title, the 'Non-Employee Creation Form' is shown, with its title highlighted by a red rectangle. The form includes a 'Person Type' dropdown menu, also highlighted by a red rectangle. The dropdown is open, showing a list of options: 'Consultant', 'Crothall', 'External Researcher' (which is highlighted in blue), 'Voluntary Faculty', and 'Volunteer'.

SailPoint

Help

Home My Work

< Form

Non-Employee Creation Form

Person Type *

Consultant

Crothall

External Researcher

Voluntary Faculty

Volunteer

How do I obtain a REDCap account? Part 2!

External collaborator



All external users must have Mount Sinai credentials

External Collaborator must:

- ▶ Navigate to <https://mshmsvnpn.mssm.edu> to change their password
- ▶ Change their Mount Sinai Password
- ▶ Navigate to <https://redcap.mountsinai.org>
- ▶ Log in with their Mount Sinai Login ID and new Password
- ▶ Upon first login, the Collaborator will be prompted to verify their email address. *Note: use an active email address.*
- ▶ Collaborators can then create new projects or be added to existing projects by the project owners.
- ▶ **Please note: Collaborator accounts are temporary and will expire at 120 days, however they can be renewed by the PI or other sponsor/delegate prior to the expiration date.**

Development vs Production

How do I know if my project is in Development or Production?

Development Project	19088	0	119	6 forms	
Production Project	19089	0	119	6 forms	







All projects are in **Development** status when first created. In Development, you can design, build and test your REDCap projects. Changes happen in real-time. There are no safeguards to protect your data.



The Production status provides safeguards to ensure that data which has already been collected is not deleted, re-coded or overwritten unintentionally. Moving your project to **Production** ensures you're maintaining data accuracy, integrity, quality, and best practices.

Production vs Development

Features	Development	Production
"Real data can be entered	X	
Changes that may cause unintentional data loss or data corruption are reviewed by a REDCap Administrator.	X	
Snapshots of data dictionary are logged before and after change	X	
Changes require draft mode to safeguard data	X	

Should I collect data in Development? NO!

You should not collect data in Development mode.
Development mode is for developing, designing, testing, and practicing.



BEST PRACTICE

Collect real-time data in Production mode
only!

How do I move data from Development to Production?

Carefully!

You can move real-time data from Development to Production without data loss by following a two-step process.

1) Project Setup -> Move your project to production status



Not
started

Move your project to production status

Move the project to production status so that real data may be collected. Once in production, you will not be able to edit the project fields in real time anymore. However, you can make edits in Draft Mode, which will be auto-approved or else might need to be approved by a REDCap administrator before taking effect.

Go to [Move project to production](#)

How do I move data from Development to Production?

2) Move your project to production status-> Keep existing data or delete?

Move Project To Production Status?

Are you sure you wish to leave the DEVELOPMENT stage? If you proceed, the project will be moved to PRODUCTION status so that real data may be collected. If you select the 'Delete ALL data' option below, all current collected data, calendar events, and uploaded documents will be deleted, otherwise all will remain untouched as the project is moved to production.

★ Have you checked the [Check For Identifiers](#) page to ensure all Identifier fields have been tagged?

Keep existing data or delete?

☒ Keep ALL data saved so far. (50 records)

☐ Delete ALL data in the project (including any survey responses), calendar events, documents uploaded onto forms/surveys, and all archived data export files stored in the File Repository, and any logged events that pertain to data collection.

Once in production, you will not be able to edit the project fields in real time anymore. However, you can make edits in Draft Mode, which will be auto-approved or else might need to be approved by a REDCap administrator before taking effect.

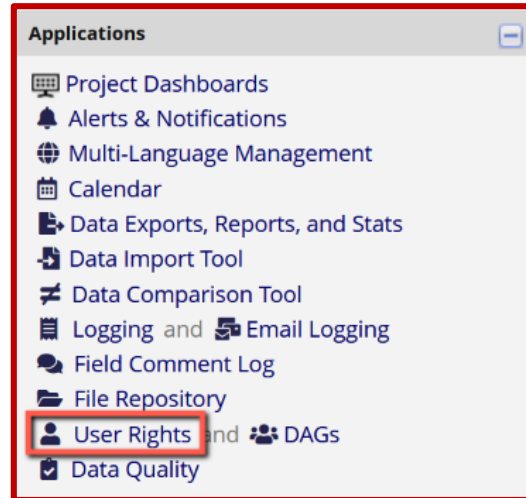
YES, Move to Production Status

Cancel

Project Ownership and User Rights

Who is the project owner in REDCap?

Project teams are the owners of the REDCap projects. The REDCap Administrators do not own the REDCap projects.



BEST PRACTICE
Each REDCap project needs a minimum of two project owners.

What are the responsibilities of a REDCap project owner?

- Project owner has **USER RIGHTS** under Applications
- Project owner has full administrative rights of REDCap project.
- Oversees the project
- Ensures all project users have appropriate privileges
- Grant permissions and user rights (project ownership)
- Transfers ownership to others when they leave to maintain continuous ownership of a REDCap project.

If you see **User Rights** under Applications on the left hand navigation panel in your project, **you are a project owner!**

User Rights = Project Ownership!

- Who is on the project?
- What privileges, roles, or rights do they need?
- User rights management is the responsibility of the project owner (the person who creates the project) and/or the user users added with User Right access.

Know who is on the project and what rights and privileges they have

The screenshot displays the 'User Rights Management' interface, divided into two main sections: 'Basic Privileges' and 'Privileges for Viewing and Exporting Data'.

Basic Privileges:

- Expiration Date:** A dropdown menu set to '(N/D)'.
- Assigned user privileges:**
 - ☒ Project Design and Setup
 - ☒ User Rights
 - ☒ Data Access Group
- Other privileges:**
 - ☒ Alerts & Notifications
 - ☒ Calendar
 - ☒ Add/Edit/Organize Reports
 - ☒ Stats & Charts
 - ☒ Data Import Tool
 - ☒ Data Comparison Tool
 - ☒ Logging
 - ☒ File Repository
 - ☒ Data Quality
 - ☒ API
- Settings pertaining to the REDCap Mobile App:**
 - ☒ Allow user to collect data offline in the mobile app
 - ☒ Allow user to download data for all records in the app?
- Settings pertaining to project records:**
 - ☒ Create Records
 - ☐ Rename Records

Privileges for Viewing and Exporting Data:

Data Viewing Rights pertain to a user's ability to view or edit data on pages in the project (e.g., data entry forms, reports). Users with the Access Data Viewing Rights for a given instrument will not be able to view that instrument for any record, nor will they be able to view fields from that instrument on a report. Data Export Rights pertain to a user's ability to export data from the project, whether through the Data Export page, API, Mobile App, or in PDF of instruments containing record data. Note: Data Viewing Rights and Data Export Rights are complementary, separate and do not impact one another.

	Data Viewing Rights			Data Export Rights			
	No Access (hidden)	Read Only	View & Edit	No Access	De-identify?	Remove All Identifier Fields	Full Data Identifier Set
Demographics	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Baseline Data	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Month 1 Data	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Month 2 Data	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Month 3 Data	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Completion Data	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

* De-identified means that all free-form text fields will be removed, as well as any date/time fields and identifier fields.

Buttons at the bottom: **Save Changes**, **Cancel**, **Remove user**.

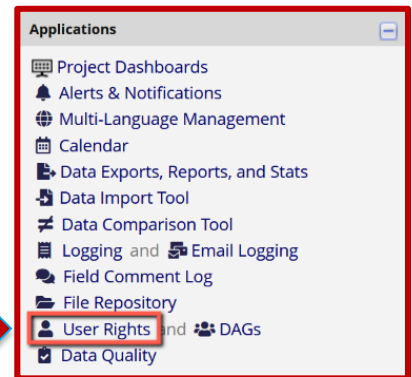
How can I add users to my REDCap project?

To add users to a REDCap project, you need **User Rights** on the project.

- Individual with **User Rights** access can alter all privileges for all other users.
- This privilege should only be granted to the **highest level users**.

To grant a user access to a REDCap project

- User must have Mount Sinai credentials and a REDCap account.
- Log in to REDCap and then, on the My Projects tab, choose your project's name.
- Under "Applications", select User Rights.



How can I add users to my REDCap project?

To add users to a REDCap project, you need **User Rights** on the project.

To grant a user access to a REDCap project

- Select User Rights
- In the "Add new user" field, enter the username (**not the email address**).
- Select Add with custom rights, and then check the boxes next to the rights you want to assign to the new user.
- Select Add user.

Project Home

Project Setup

User Rights

Data Access Groups

This page may be used for granting users access to this project and for managing the user privileges of those users. You may also create roles to which you may assign users (optional). User roles are useful when you will have several users with the same privileges because they allow you to easily add many users to a role in a much faster manner than setting their user privileges individually. Roles are also a nice way to categorize users within a project. In the box below you may add/assign users or create new roles, and the table at the bottom allows you to make modifications to any existing user or role in the project, as well as view a glimpse of their user privileges.

Upload or download users, roles, and assignments

Add new users: Give them custom user rights or assign them to a role.

Add new user

+ Add with custom rights

— OR —

Assign new user to role

Assign to role

Create new roles: Add new user roles to which users may be assigned.

Enter new role name

+ Create role

(e.g., Project Manager, Data Entry Person)

Basic Privileges

Expiration Date

Upload and download

Project Design and Setup

User Rights

Data Access Groups

Draw privileges

Alerts & Notifications

Calendar

Just-in-Time Organizational Reports

Stats & Charts

Data Import Tool

Data Comparison Tool

Logging

File Repository

Data Quality

API

Settings pertaining to the REDCap Mobile App

REDCap Mobile App

Allow user to download data for all records to the app?

Settings pertaining to project records

Create Records

Rename Records

Privileges for Viewing and Exporting Data

Demographics

Baseline Data

Month 1 Data

Month 2 Data

Month 3 Data

Completion Data

Data Viewing Rights

Data Export Rights

Save Changes

Cancel

Remove user

Orphaned projects and transferring ownership

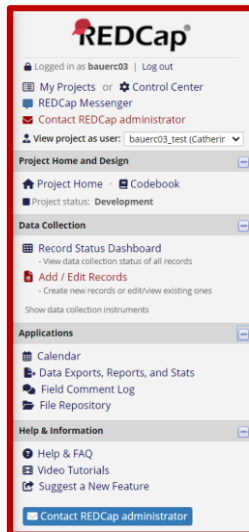
What happens if the project owner leaves and does not transfer User Rights, project ownership?

- REDCap Projects without active owners are considered **“orphaned.”**
- For 'orphaned' projects in REDCap, it is crucial ensure ownership is transferred properly .
- A Principal Investigator or Department Administrator will need to confirm this change to this REDCap project.
- If this is a research project, then please ensure you are following the research protocol and adding the new project owners must to the Institutional Review Board (IRB) if necessary.

BEST PRACTICE
Transfer project ownership before
a project owner leaves the project.

How do I know if I have an orphaned REDCap project?

- No one on the project has access to **User Rights**.
- **User Rights** does not display under Applications the project.
- Projects without active owners are considered orphaned projects.



Expiration (click expiration date to edit)	Project Design and Setup	User Rights	Data Access Groups
never	✗	✗	✗
never	✗	✗	✗
never	✗	✗	✗
never	✗	✗	✗
never	✗	✗	✗

What are best practices for managing User Rights?

- **ONLY provide needed access rights:** This is especially important for the high level roles of "Project Design & Setup" and "User Rights"
- **Set expiration dates for users:** If you are adding a user to a project for a limited amount of time, set an expiration date for their access at the time you add them to the project.
- **Create and utilize User Roles in your project:** A User Role has a pre-defined level of access. For instance, you might create a user role for Data Entry to only enter data but not change project settings or delete data.
- **Consolidate sensitive information in one instrument:** If there are users who should not see identifiable information in the project, the best solution is to keep all of the sensitive information on one instrument and restrict access through User Rights.
- **Maintain at least two active project owners at all times.**
- **Departure procedures for study team members**
 - ✓ Suspend access to the REDCap project in User Rights.
 - ✓ Suspend individual API tokens.

Resources

Resources

Upcoming REDCap Town Hall

- The REDCap Town Hall will be held Monday, October 23, 3 pm- 4 pm. This will be a hybrid session located in Goldwurm Auditorium at the Icahn Medical Institute (1st Floor) and on Zoom webinar. Click [here](#) to register for Zoom.

Interested in learning more about REDCap?

- For information about REDCap, please visit the [REDCap website](#).
- For questions and information about REDCap Chargebacks, please visit the [REDCap FAQ](#)
- For video tutorials of REDCap in action and an overview of its features, please see the [Training Resources](#) page.
- If you require assistance or have any questions about REDCap, please contact [Mount Sinai REDCap Support](#).

REDCap videos

https://www.youtube.com/@ucdredcap5650/videos#training_videos

Great resources courtesy of a REDCap Consortium partner institution!

(University of Colorado Denver courtesy training videos)

Digital Concierge Services

Virtual REDCap Office Hours: Wednesdays at 3:30pm to 4:30pm

- Open to all
- Get help with specific project questions
- First-come, first-served

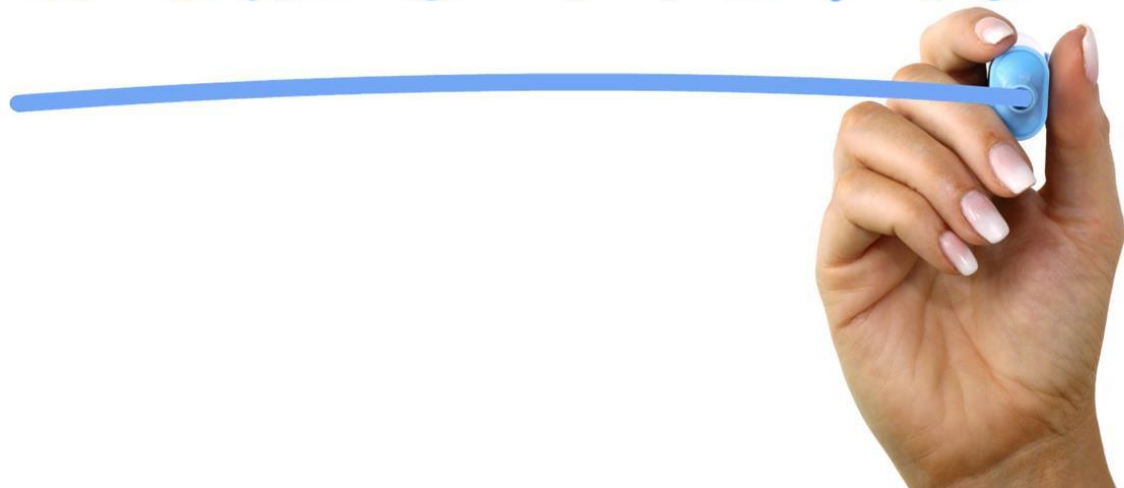
- Every Wednesday from 3:30 p.m. – 4:30 p.m. (ET):
[Click here to register and join](#)

- You can also get help with other services such as: DTP Academic Technology, HPC, MSDW, Self-service Cohort Query Tools, eRAP, Data Ark Data Commons, DTP Cybersecurity, and Levy Library Resources and Services

More REDCap Office Hours

- Bonus Day scheduled once a month to accommodate users who cannot attend on Wednesdays.

QUESTIONS



**Thank you for attending the
REDCap Essentials training!**



Cate Bauer-Martinez

Scientific Computing and Data

October 12, 2023



Icahn
School of
Medicine at
**Mount
Sinai**