

# WVCTSI REDCap Frequently Asked Questions (F.A.Q)

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## NEW USERS

### Where can I find training videos for REDCap?

General REDCap training videos are available within REDCap itself. Please sign in to REDCap to view the videos. Note that a REDCap account is required for access.

### I have a question about my user account or someone else's user account.

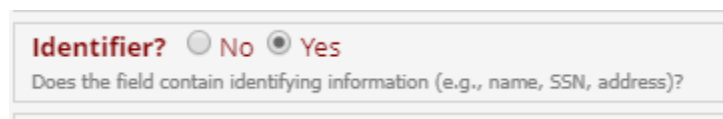
Please view the FAQ section dedicated to user management.

### Sensitive Data Use

To protect the identities of research subjects, it is highly recommended to avoid using any data that are considered to be identifiers under HIPPA policies. Identifiers include:

1. Name
2. Fax number
3. Phone number
4. E-mail address
5. Account numbers
6. Social security numbers
7. Medical Record number
8. Health plan number
9. Certificate/license numbers
10. URL (personal websites and links for business or social media)
11. IP address
12. Vehicle identifiers
13. Device ID
14. Biometric ID
15. Full face/identifying photo
16. Other unique identifying number, characteristic, or code (including date of birth)
17. Postal address (geographic subdivisions smaller than state)
18. Date precision beyond year

If for some reason it is necessary to use any of the information above, please use the identifiers function in REDCap to mark the variables appropriately. Using this function will prevent the downloading of any identifying information.



The image shows a screenshot of a form element in REDCap. It features a label 'Identifier?' in red text. Below the label are two radio buttons: 'No' and 'Yes'. The 'Yes' radio button is selected, indicated by a black dot in the center. Below the radio buttons is a smaller text label: 'Does the field contain identifying information (e.g., name, SSN, address)?'. The entire form is enclosed in a light gray border.

## USER MANAGEMENT

How do I add a new user to a REDCap project or get myself added to REDCap?

### External User Account Creation

1. Make sure you are a member of the CTSI. If you are not, you can become a member by going to [wvctsi.org/membership](http://wvctsi.org/membership)
2. External users must have a WVU sponsor (i.e. a WVU PI/ Co-investigator or any WVU affiliate on the project)
3. The WVU sponsor must go to <https://wvu.teamdynamix.com/TDClient/Requests/TicketRequests/NewForm?ID=qHjRIh%7eF-%7e8> and request a WVU guest account on behalf of the external user. The sponsor must know the external users full legal name, DOB and email.
4. The external user must wait for email verification that their WVU guest account was created.
5. Once confirmed and activated, the user must go to <https://wvu.corefacilities.org/account/login>.
6. Sign in using your WVU credentials. This should re-direct you to the standard WVU login page.
7. Once logged in, select your lab/PI. If the lab or PI you are affiliated with does not appear in the drop-down list, please select "CTSI Community" as your lab. You will receive an email when your account has been finalized.
8. From the iLab home page, open the left menu and choose "Core Facilities."
9. From the list of cores, select WVCTSI Clinical Research, Epidemiology, and Biostatistics Core.
10. In the upper right hand corner of the core home page, click on the "Request Services" tab.
11. Choose "request service" next to REDCap Services.
12. Complete the request form in full; then click "submit." Please do not enter any payment information.

### Internal Users

1. Make sure you are a member of the CTSI. If you are not, you can become a member by going to [wvctsi.org/membership](http://wvctsi.org/membership)
2. Go to <https://wvu.corefacilities.org/account/login>
3. Sign in using your WVU credentials. This should re-direct you to the standard WVU login page.
4. Once logged in, select your lab/PI. If the lab or PI you are affiliated with does not appear in the drop-down list, please select "CTSI Community" as your lab. You will receive an email when your account has been finalized.

5. O From the iLab home page, open the left menu and choose “Core Facilities.”
6. From the list of cores, select WVCTSI Clinical Research, Epidemiology, and Biostatistics Core.
7. A In the upper right hand corner of the core home page, click on the “Request Services” tab.
8. Choose “request service” next to REDCap Services.
9. Complete the request form in full; then click “submit.” Please do not enter any payment information.

#### Directions to project owner/administrator for adding someone with a WVU username

Before starting this process, please make sure that the user you are adding has claimed their account and logged into REDCap at least once before.

1. Go to “project set up” tab in your project, scroll down to user rights and permissions section, select “user rights”
2. Add new user name by their WVU username (ex. jdoe001). Please note that attempting to add an individual to a project using their email address will not work. You MUST use their WVU username.
3. Select the appropriate user rights– this will generate an invitation that is sent to your new user, and they can now enter the database
4. Send new users a follow up email alerting them to the fact that they should have received an email, and if they did not, they should contact you and let you know that this did not work. The user should now see the project in their project list under 'My Projects' in the upper left hand corner of the home page.

## DUO Two-Factor Authentication

What is DUO and why do I have to use it?

WVCTSI requires two-factor authentication for additional security to REDCap users and the data stored in the system. DUO is an application that can be installed on your smart phone or tablet, and will allow you to confirm your identity when logging in to REDCap. For instructions on how to install and use DUO, please visit

<https://wvu.teamdynamix.com/TDClient/KB/ArticleDet?ID=44017>

What if I don't have a smart device to install DUO on?

If you don't have a smart device, you can buy a Duo hardware token from the WVU Barnes and Noble website

<https://wvu.bncollege.com/webapp/wcs/stores/servlet/ProductDisplay?catalogId=10001&langId=-1&productId=400000363208&storeId=15062&imageId=1363350&graphicId=x>

For instructions and further information on using tokens, please visit

<https://wvu.teamdynamix.com/TDClient/Shared/FileOpen?AttachmentID={6AD6926B-D96A-41E4-B3F0-8D8930437C4D}&ItemID=31094&ItemComponent=26&IsInline=1>

I cannot find the "user rights" page.

Provided you have the appropriate user rights (i.e. rights to edit user rights), you should find a link in the application list on the left hand side of the screen called "user rights".

If this is not the case, contact someone with the appropriate rights or the REDCap Administrator.

I added a user, but the user tells me that the project is not showing up in the project list.

Double check if you used the correct formatting for adding a user.

The correct format to use is their WVU username (ex. jdoe001).

If you double-checked the format and the problem still exists, contact the REDCap Administrator.

I forgot my WVU password. Now what?

Because REDCap runs through the WVU login system, users have to go to <http://login.wvu.edu> for all account related help. The REDCap administrator cannot reset or retrieve your password.

I'm trying to log in, but REDCap is telling me that it is awaiting "email account verification" and I didn't receive any email.

REDCap sends out these verification emails automatically, so they sometimes get caught in spam filters.

Try checking your spam filter folder for the verification email. If you can't find the verification email, contact the REDCap Administrator.

In some cases, external users may find that email policies at their institution are preventing these automated emails from getting through. If this is the case, the institutions system administrator may have to be contacted to allow the emails from REDCap, or an alternative email will need to be provided.

## ADVANCED FEATURES

How can I use REDCap for my project if I will be in the field and without Internet access?

If you are interested in offline solutions, please watch the video "REDCap Mobile App" located under "Training Videos" within REDCap.

How do I copy a previous project as a starting point for a new project?

Do you have a successful REDCap project that you would like to reuse or repurpose for another project?

If you do, then you might want to consider using the REDCap "Copy Project" button, which lets you copy all the events, forms, variables, and settings into a new project.

During the copy process, you will have the opportunity to edit the Project title and define a new purpose to the project. You have the option to copy or not copy any of the following:

- All records/responses
- All users and roles
- All reports
- All data quality rules
- All Project Folders
- All settings for Survey Queue and Automated Survey Invitations
- All project bookmarks

The "Copy Project" button can be found in the "Other Functionality" tab in the project you want to copy.

## MOVING A PROJECT TO PRODUCTION

## Why should I move my project to Production mode? It runs just fine in Development mode.

All REDCap projects should be moved to Production mode before real data is collected. There are a number of reasons for this:

It is extremely easy to delete data in Development mode. This is by intent and is one of REDCap's handiest design and development features. However, this ease of deletion obviously can be dangerous once real data is being collected, and so REDCap makes it considerably more difficult to delete data from projects in Production mode. (And it follows from this that test data should never be entered in a project in Production mode.)

Everybody occasionally forgets stuff. When this happens and a user modifies the design of a project to cover some issue(s) that originally was overlooked, there always is the chance that the change(s) will corrupt data in the project. For a project in Development mode that contains test data this is no problem, but if the project in Development mode contains real data it can be a disaster. For projects in Production mode, all ex post facto changes are made in a parallel, "draft" copy of the project and not the actual project. The changes must be approved before they overwrite the actual project, and if during the approval process REDCap detects that they may cause data corruption, the REDCap administrator is notified. The REDCap administrator will then review the draft changes and notify the user if data loss will occur as a result.

REDCap is a very well designed web-based data collection system, but it does contain a number of gotcha's. For projects in Production mode, REDCap anticipates these when it's possible they are about to occur and steers the user to a REDCap administrator for assistance in order to help prevent accidental data loss and /or corruption. In Development mode, however, no such safeguards are in place. REDCap assumes all data in a Development mode project is test data and is unimportant and 100% dispensable in order to facilitate ease of design, development, and testing and put a minimum of speed bumps in the developer's path.

## ISSUES WITH MY PROJECT

### How should I test my project prior to moving it to production?

All REDCap projects must be tested for proper design and functionality prior to move to Production. Failing to adequately test new REDCap projects results in move to Production issues requiring REDCap administrator intervention in many such cases; and in most of the remaining fail-to-test cases, missed by REDCap administrators, the project does not do what the user wants, so testing virtually always saves the user time. Also, adequate testing will answer many of the questions that the user has.

All data collection instruments must be tested individually by entering dummy data.  
**DO NOT TEST BY ENTERING REAL DATA.**

If the first data collection instrument is a SURVEY, test it by clicking the "Survey Distribution Tools" link in the left nav column of REDCap and then clicking the "Public Survey Link" button. This presents the survey to the user in exactly the format that prospective respondents will see it (DO NOT test surveys by using the "Add/Edit Records" link in the left nav column of REDCap or the "Preview instrument" button in "Online Designer"). After dummy data has been entered in the survey the "Submit" button should be clicked, and the project should be checked to verify that the dummy data has been successfully collected.

For all surveys, first instrument or not, complete testing should be accomplished by distributing them to testers using the same method(s) that will be used for collecting real data: emailing from the REDCap Participant List, "Automated Survey Invitations," the "Survey Queue," and/or "Auto-continue to next survey." This approach tests total functionality by testing both the survey design and the planned distribution method.

To test a REGULAR DATA COLLECTION INSTRUMENT, use the "Add/Edit Records" link in REDCap's left nav column. Do not use the "Preview instrument" button in "Online Designer."

For all types of instruments, be sure to export test data and make sure everyone to be involved in the analysis is happy.

If the effort your REDCap project is intended to support is time sensitive or has a hard deadline, do not wait to the last minute to do your testing.

## FEATURES

[How should I use Draft mode on a project in Production so that I do not corrupt existing data?](#)

There are two main rules to follow when making changes to your project in Draft mode:

- 1) Never ever ever alter the codings for any existing options in drop-downs, radio buttons, and check boxes. In other words, to add "C" to this existing option list --

1, A  
2, B  
3, D

you would do it as --

1, A  
2, B



4, C  
3, D

and NOT as --

1, A  
2, B  
3, C  
4, D

In other words, DO NOT re-code the existing "3, D" to "4, D." (REDCap stores the "3" and the "4" in the database and NOT the "C" and the "D.")

- 2) Never delete any field unless you know for certain that there is no data recorded for that field.