Tufts Clinical and Translational Science Institute

Version LTS 10.0
Upgrade Date: 7/30/2020
Overview

Tufts CTSI recently upgraded REDCap to version 10.0. The new REDCap features are summarized below. If you have questions about these features, please email informatics@tuftsctsi.org:

- Field Embedding
- Record-Level Locking
- Multi-Field Logic
- DAG Switching
- …and many more!
- Improved “My Projects”
- Project Lifecycle Changes
- Improved Alert Options
- e-Consent
Field Embedding

REDCap now makes it easier to rearrange a page with **Field Embedding**, which allows you to add a field to the text of another:

Do you prefer:  
- Cats
- Dogs
- Rabbits
- Other: Geese
Field Embedding

To embed a field, simply enclose the field’s variable name in curly brackets, like \{this\}:
Field Embedding

Field Embedding can be used to create complex layouts, such as tables built using the Rich Text Editor:

<table>
<thead>
<tr>
<th>Field Type: Descriptive Text (with optional Image/Video/)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Field Label</td>
</tr>
<tr>
<td>Paragraph B I</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Federal Grants</td>
<td>{fed2012}</td>
<td>{fed2013}</td>
<td>{fed2014}</td>
<td>{fed2015}</td>
<td>{fed2016}</td>
</tr>
<tr>
<td>Non-federal Grants</td>
<td>{nfed2012}</td>
<td>{nfed2013}</td>
<td>{nfed2014}</td>
<td>{nfed2015}</td>
<td>{nfed2016}</td>
</tr>
<tr>
<td>Research Agreements/Contracts</td>
<td>{contr2012}</td>
<td>{contr2013}</td>
<td>{contr2014}</td>
<td>{contr2015}</td>
<td>{contr2016}</td>
</tr>
</tbody>
</table>
Field Embedding

Which can lead to complex, beautiful page layouts that can be made to match complex spreadsheets or paperwork:

<table>
<thead>
<tr>
<th>Record ID</th>
<th>3</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sponsored Research Proposals</strong></td>
<td></td>
</tr>
<tr>
<td>Date</td>
<td>2012</td>
</tr>
<tr>
<td>Federal Grants</td>
<td></td>
</tr>
<tr>
<td>Non-federal Grants</td>
<td></td>
</tr>
<tr>
<td>Research Agreements/Contracts</td>
<td></td>
</tr>
<tr>
<td><strong>Food question</strong></td>
<td></td>
</tr>
<tr>
<td>How often did you eat spicy foods last year?</td>
<td></td>
</tr>
<tr>
<td>number of servings</td>
<td></td>
</tr>
<tr>
<td>Do not know / Prefer not to answer</td>
<td></td>
</tr>
<tr>
<td>Per day</td>
<td></td>
</tr>
<tr>
<td>Per week</td>
<td></td>
</tr>
<tr>
<td>Per month</td>
<td></td>
</tr>
<tr>
<td>reset</td>
<td></td>
</tr>
</tbody>
</table>
Field Embedding

- You will not be able to see Field Embedding in the Online Designer; instead, fields that are embedded elsewhere will be labeled.

- Field Embedding can be used in field labels, answer labels for multiple choice questions, and field notes.

- Embedding a field will result in that field following the branching logic of the field it is embedded in.
Record-Level Locking

- A new option under **User Rights** now allows users to **lock entire records** so that they cannot be modified until unlocked.
- This operates **separately** from the current instrument-level locking privileges.

**Settings pertaining to record locking and E-signatures:**

- **Record Locking Customization:**
  - **Record Locking**
  - **Lock/Unlock Records (instrument level):**
    - Users with locking privileges also have access to the E-signature and Locking Mgmt page on the left-hand Applications menu.
- **Watch video about locking**

**Lock/Unlock *Entire* Records (record level):**

**NOTE:** It is important to note that instrument level locking and record level locking are independent features that are governed by separate user privileges (as seen above). You must have explicit permission to either one in order to perform that specific locking action. Also, record locking is a higher-level locking than instrument locking, which means that an entire record may be locked or unlocked while one or more instruments are currently locked, but an instrument cannot be locked or unlocked while the entire record is locked.
Record-Level Locking

• To lock a record, a user can go to the **Record Home Page** and select “**Lock Entire Record**”.

• Locked records will have a lock symbol on them, and users who enter the records will be told who locked the record, when, and that they cannot make changes.
Multi-Field Branching Logic

To speed up database development, REDCap will now recognize if you are attempting to change branching logic that is shared between multiple fields, and allow you to apply changes to all fields at once:

Edit Branching Logic

This branching logic is shared by multiple fields. Would you like to automatically update those fields now?

☐ Do not show this message again.

Yes No
DAG Switching

Users can now be assigned to multiple potential Data Access Groups (DAG’s). Once assigned to multiple DAG’s, users can freely switch between them, changing what they can view, and the DAG of the records they can create:
DAG Switching

- You are still able to assign and view users’ current DAG’s:

<table>
<thead>
<tr>
<th>Data Access Groups</th>
<th>Users in group</th>
<th>Number of records in group</th>
<th>Unique group name (auto-generated)</th>
<th>Group ID number</th>
<th>Delete group?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cardiology</td>
<td></td>
<td>0</td>
<td>cardiology</td>
<td>1609</td>
<td>X</td>
</tr>
<tr>
<td>Neurology</td>
<td></td>
<td>0</td>
<td>neurology</td>
<td>1610</td>
<td>X</td>
</tr>
<tr>
<td>Ophthalmology</td>
<td></td>
<td>0</td>
<td>ophthalmology</td>
<td>1611</td>
<td>X</td>
</tr>
<tr>
<td>Rheumatology</td>
<td></td>
<td>0</td>
<td>rheumatology</td>
<td>1612</td>
<td>X</td>
</tr>
<tr>
<td>[Not assigned to a group]</td>
<td></td>
<td>3</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- And users will have a banner indicating which DAG they are part of and whether they can switch:
DAG Switching

Switching between DAG’s is as easy as a click of a button:
Improved “My Projects” Page

The My Projects page has now been improved with a Search Bar, Collapse All button, and the Project ID (PID) of a project, which is a way to uniquely identify a project:

<table>
<thead>
<tr>
<th>Project Title</th>
<th>PID</th>
<th>Records</th>
<th>Fields</th>
<th>Instruments</th>
<th>Type</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>REDCap Development Database</td>
<td>4705</td>
<td>3</td>
<td>7</td>
<td>1 form</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Project Lifecycle Changes

A new Project Status, “Analysis/Cleanup”, has been added, allowing you to lock an entire project:

Move to Analysis/Cleanup status

Move the project to Analysis/Cleanup status if data collection is complete. This will disable most project functionality, although all collected data will remain intact. Once in Analysis/Cleanup status, the project can be moved back to production status at any time.
Project Lifecycle Changes

• Following Analysis / Cleanup, you can also mark a project as being "Completed", which will make the project inaccessible and hide it on My Projects.

• Due to these changes, the Archived status has now been removed.
Projects that were previously marked as *Archived* will now be moved to the “*My Hidden Projects*” folder, which can be viewed using the “*Organize Folders*” button:
Improved Alerts and Notifications

New settings have been added to Alerts and Notifications to make it easier to schedule alerts in advance without using datediff(), and to send them multiple times:

1. **STEP 2: Set the Alert Schedule**

When to send the alert?
- Send immediately
- Send on next Day at time H:M
- Send the alert after time lapse of 20 days 0 hours 0 minutes
- Send at exact date/time: MM/DD/YYYY HH:MM

Send it how many times?
- Just once
- Multiple times on a recurring basis:
  - Send every 1 days after initially being sent.
  - Send up to 30 times total (including the first time sent). Leave blank to continue sending forever.
e-Consent is a framework under Survey Settings that allows you to set a survey to be an electronic consent form, complete with PDF Archiving, Version Tracking, and a Signature:
e-Consent

To set a survey as an e-Consent, you must assign name fields and a required “Signature” field (this can be a text field); you can also include additional fields if you would like:
The consent language itself can go in the survey instructions or a descriptive field, and participants who complete the survey will be required to review and approve it upon submission:
e-Consent

All e-Consent forms are backed up in the File Repository under PDF Survey Archive, with the ability to track completion time, identifiers, version, and IP Address:

File Repository

This page may be used for storing and retrieving files and documents used for this project. You may upload files here to save for retrieval later, or you may download previously uploaded files in the file list below. Whenever a data export is performed, the resulting data and syntax files are stored here also.

Displayed below are PDF files that have been automatically captured and stored by the PDF Auto-Archiver setting, which has been enabled by one or more surveys on their Survey Settings page. Only users with 'Full data set' data export privileges will be able to download the archived files. Note: The PDFs below were archived when a participant completes a survey, which means they might be different from other downloadable PDFs in the project that are generated on demand using the current data.
e-Consent

• To improve file security, our REDCap server will now store files in a secure location on a different server

• This server is behind the Tufts Medical Center firewall and is only accessible to the outside from REDCap

• All REDCap data (such as form and survey responses) are also stored in a separate, firewall-protected server to protect data from attack
…And Many More Features!

- Survey pages are now considered **ADA Section 508 compliant**
- Long field labels are shortened when exporting to stats packages
- Periods can be used in Missing Data Codes and Checkbox Fields
- Fields marked **@READONLY** are now more easily readable
- The **datediff()** function no longer requires the date format
- Record ID can be hidden from the PDF header
- Survey confirmation emails now are logged
- Shortened URLs now use "**https://redcap.link/**"

To see the full release notes, please look at our website at

Request a REDCap Account

To request a REDCap user account or receive other REDCap support, please follow the Request Services link located on our website at www.tuftsctsi.org and we will contact you within 48 hours.

Thank you!