

# Tufts Clinical and Translational Science Institute

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**Version LTS 10.0**

**Upgrade Date: 7/30/2020**

**Tufts | CTSI**

Tufts Clinical and Translational Science Institute

# 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](mailto: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

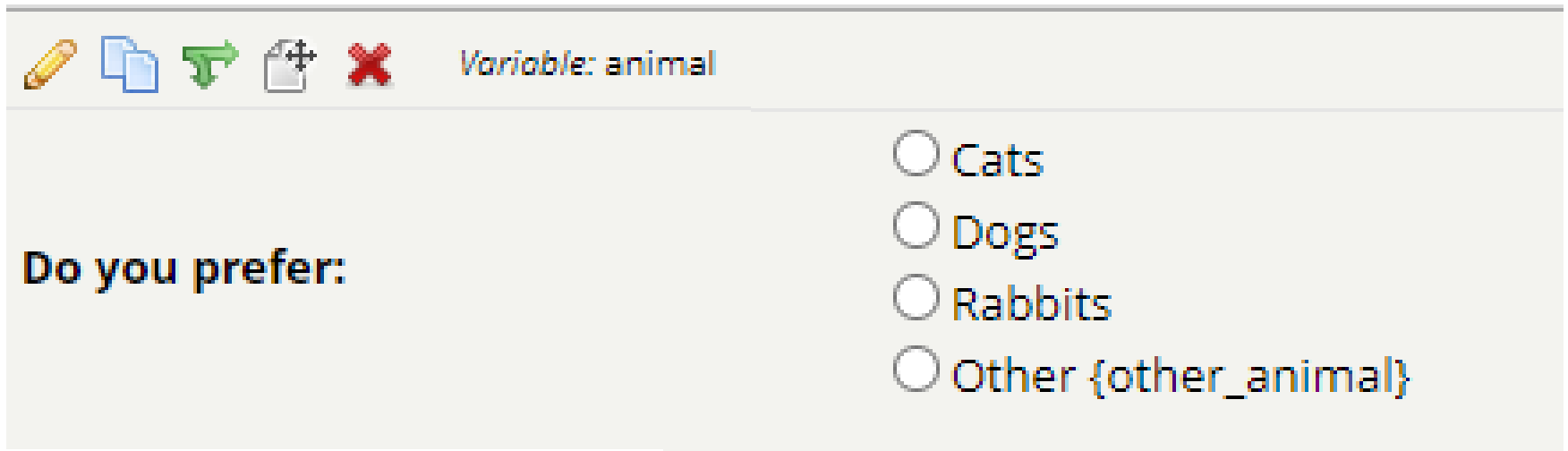
Dogs

Rabbits

Other

# Field Embedding

To embed a field, simply enclose the field's variable name in curly brackets, like **{this}**:



The screenshot shows a form interface with a toolbar at the top containing icons for edit, copy, paste, add, and delete. Below the toolbar, the text "Variable: animal" is displayed. The main content area contains the question "Do you prefer:" followed by four radio button options: "Cats", "Dogs", "Rabbits", and "Other {other\_animal}". The curly braces in the "Other" option are highlighted in blue, demonstrating field embedding.

Variable: animal

Do you prefer:

- Cats
- Dogs
- Rabbits
- Other {other\_animal}

# Field Embedding

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

### Edit Field

You may add a new project field to this data collection instrument by completing the fields below and clicking the Save button on this page. For an overview of the different field types available, you may view the [Field Types video \(4 min\)](#).

Field Type: Descriptive Text (with optional Image/Video/... ▼)

Field Label  Use the Rich Text Editor [?](#)

Paragraph ▼ **B** *I*

	2012	2013	2014	2015	2016
<b>Federal Grants</b>	{fed2012}	{fed2013}	{fed2014}	{fed2015}	{fed2016}
<b>Non-federal Grants</b>	{nfed2012}	{nfed2013}	{nfed2014}	{nfed2015}	{nfed2016}
<b>Research Agreements/Contracts</b>	{contr2012}	{contr2013}	{contr2014}	{contr2015}	{contr2016}

# Field Embedding

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

Record ID	3				
<b>Sponsored Research Proposals</b>					
	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>
<b>Federal Grants</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Non-federal Grants</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Research Agreements/Contracts</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Food question</b>					
<b>How often did you eat spicy foods last year?</b>	<input type="text"/>			<input type="radio"/> Per day	
	number of servings			<input type="radio"/> Per week	
	<input type="checkbox"/> Do not know / Prefer not to answer			<input type="radio"/> Per month reset	




# 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	<input type="checkbox"/>
 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. <a href="#">Watch video about locking</a>	<input checked="" type="radio"/> Disabled <input type="radio"/> Locking / Unlocking <input type="radio"/> Locking / Unlocking with E-signature authority <a href="#">What is an E-signature?</a>
 Lock/Unlock *Entire* Records (record level)	<input checked="" type="checkbox"/>

**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**




## Record Home Page

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.

Choose action for record ▾

-  Download PDF of record data for all instruments
-  Download PDF of record data for all instruments (compact)
-  Lock entire record
-  Rename record
-  Delete record (all forms)

## Record ID 1

 Data Collection Instrument	Status
Intake Data (survey)	
Data Collection	

# 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.*

# 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:

Data Access Groups	Users			
[No Assignment]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cardiology	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Neurology	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ophthalmology	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Rheumatology	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

# DAG Switching

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

Data Access Groups	Users in group	Number of records in group	Unique group name (auto-generated) ⓘ	Group ID number ⓘ	Delete group?
Cardiology		0	cardiology	1609	✘
Neurology		0	neurology	1610	✘
Ophthalmology		0	ophthalmology	1611	✘
Rheumatology		0	rheumatology	1612	✘
[Not assigned to a group]		3			

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

**i** Current Data Access Group: [No Assignment] [Switch](#)

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# DAG Switching

Switching between DAG's is as easy as a click of a button:

**i** Current Data Access Group: **Cardiology** **Switch**

**Switch Data Access Group** **x**

Select the Data Access Group to which you would like to switch:

Cardiology **v**

Cardiology

Neurology

**Ophthalmology**

# 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:


Project Title	PID	Records	Fields	Instruments	Type	Status
REDCap Development Database	4705	3	7	1 form	■	🔧

My Projects Organize Collapse All  × 🗑️


# Project Lifecycle Changes

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

 Project Home

 Project Setup

 Other Functionality

 Project Revision History

 [Edit project settings](#)

## Project Status Management



Development



Production  
(current)



Analysis/Cleanup

[Move to Analysis/Cleanup status →](#)

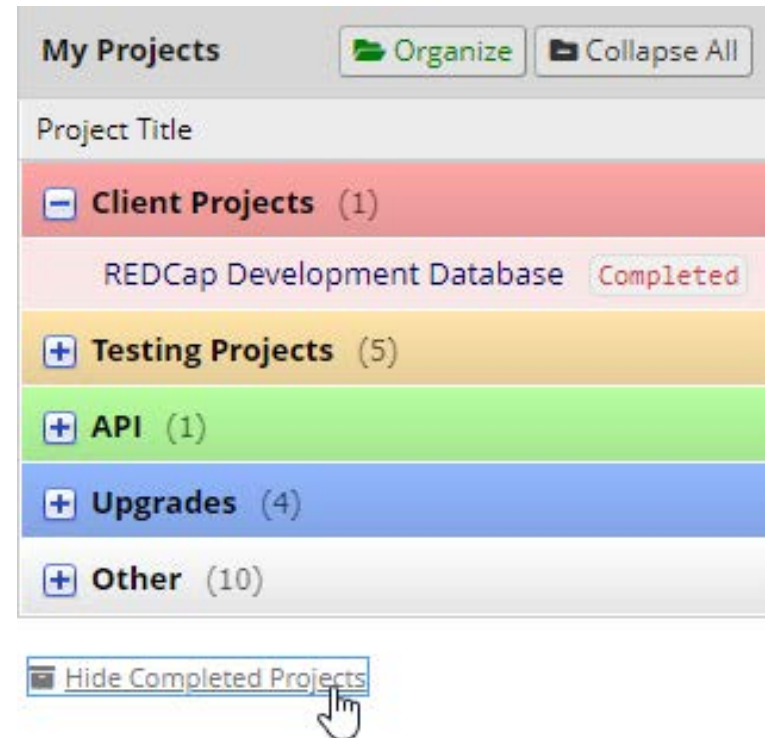
Move the project to Analysis/Cleanup status if data collection is complete. This will disable most project functionality, although all collected data will remain intact. Once in Analysis/Cleanup status, the project can be moved back to production status at any time.

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# 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















# Project Lifecycle Changes

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:

**STEP 1: Create Folders**

My Folders

Client Projects		
Testing Projects		
API		
Upgrades		
Other		
<b>[ My Hidden Projects ]</b>		

# 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:

## 🕒 STEP 2: Set the Alert Schedule

When to send the alert?

- Send immediately
- Send on next  at time  H:M
- Send the alert after time lapse of  days  hours  minutes
- Send at exact date/time:

Send it how many times?

- Just once
- Multiple times on a recurring basis:
  - Send every   after initially being sent.
  - Send up to  times total (including the first time sent). *Leave blank to continue sending forever.*

# e-Consent

**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**:

- Disabled
- Auto-Archiver enabled
- Auto-Archiver + e-Consent Framework [What is the e-Consent Framework?](#)  
(includes end-of-survey certification & archival of PDF consent form)

## e-Consent Framework Options:

For e-Consent it is sometimes required to include the consenting participant's name (and date of birth in some cases) on the final consent form as extra documentation of their identity. Below you may select fields used to capture that info. You may also enter the current e-Consent version and e-Consent type for this form. The values for the fields below will be automatically inserted into the footer of the PDF consent form that the participant will review at the end the survey, after which that PDF 'hard-copy' will be archived in the File Repository. [Read more](#)

Allow e-Consent responses to be edited by users?

e-Consent version:  e.g., 4

First name field:

Last name field:

Note: If you are using a single field to capture whole name, you may select it for either first/last name above while leaving the other name field unselected.

Optional fields (these are not always necessary for e-Consent):

e-Consent type:  e.g., Pediatric

Date of birth field:


Force signature field(s) to be erased if participant clicks Previous Page button while on the certification page?

Select a field below that serves as a signature field in this survey. It could be a [free-form text field](#), a [signature field](#), or a [number field](#) (e.g., to collect a PIN), and it must be a [Required field](#). If any fields are selected below, then if the participant gets to the last page of the survey where it asks them to certify their responses, if they then choose to click the Previous Page button, it will erase the value of these signature fields, thus forcing them to 'sign' the field(s) again before completing the survey. If you do not want this behavior, do not select any fields below. You may use up to five signature fields.

Signature field #1:

# 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:

 **e-Consent Framework Options:**

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Signature field #1:

# e-Consent

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:

Consent Form Resize font: + | -

Displayed below is a read-only copy of your survey responses. Please review it and the options at the bottom.

**Consent Form** Page 1

Please complete the survey below.

Thank you!

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I hereby agree to the terms stated below:

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

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1) First Name	John
2) Last Name	Doe
3) Signature	John Doe

I certify that all the information in the document above is correct. I understand that clicking 'Submit' will electronically sign the form and that signing this form electronically is the equivalent of signing a physical document.

If any information above is not correct, you may click the 'Previous Page' button to go back and correct it.


[<< Previous Page](#) [Submit](#)


# 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.

 User Files


 Data Export Files

 PDF Survey Archive

 Upload New File

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.

Show  entries

Survey Completion Time	Record	Survey	Identifier (Name, DOB)	IP Address	Version	Type	Download
07/27/2020 11:51pm	<a href="#">3</a>	Consent Form	John Doe				

Previous

1

Next

# 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 [tuftsctsi.org/research-services/informatics/redcap-research-electronic-data-capture/](https://tuftsctsi.org/research-services/informatics/redcap-research-electronic-data-capture/)



# 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](http://www.tuftsctsi.org) and we will contact you within 48 hours.

Thank you!