



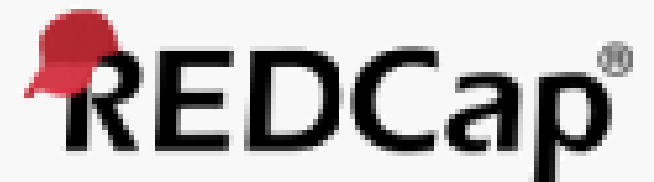
# **ILAE/AES Joint Translational Taskforce REDCap Project Introduction**

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# Overview

- Introduction
- Project setup
- REDCap Dashboard
- Adding a record
- Repeatable forms
- Uploading files
- Tools and resources





# Introduction

- REDCap is the electronic data capture software used to host the ILAE/AES Joint Translational Task Force CDEs in eCRF format
- This presentation will serve as a guide for:
  - Importing the project created by LONI for use in an external REDCap system
  - Basic data entry by a typical user
  - Uploading files to the project
  - How to access additional REDCap tools and resources

*Please note: this guide references REDCap version 7.6.9. Some images in this presentation may differ from other REDCap versions.*



# Project Setup

- Setup of the ILAE/AES REDCap project requires the following:
  1. An instance of REDCap set up in your home institution
    - *Please refer to your IT team for setup of and access to the REDCap software*
  2. The XML file containing all metadata for the project
    - *This will be provided to you in your deliverables from LONI*



# Project Setup

- On your institution's REDCap homepage, locate **+ New Project**
- On the following page, enter your project title, purpose, and notes
- Select 'Upload a REDCap project XML file' from the options
- Upload the ILAE/AES project XML file **here**
- Click 'Create Project' to finalize import
- You will then be taken to the project setup homepage\*

**+ Create a new REDCap Project**

You may begin the creation of a new REDCap project on your own by completing the form below and clicking the Create Project button at the bottom.

**Project title:**   
Title to be displayed on project webpage

**Purpose of this project:**   
How will it be used?

**Project notes (optional):**   
Comments describing the project's use or purpose that are displayed on the My Projects page.

**Start project from scratch**

☐ Create an empty project (blank slate)

☒ Upload a REDCap project XML file (CDISC ODM format)

**Choose File**

☐ Use a template (choose one below)

**★ Choose a project template** (comes pre-filled with fields, forms/surveys, and other settings) [Add templates \(Administrators only\)](#)

select template	Template title (sorted by title)	Template description
<input type="radio"/>	Basic Demography	Contains a single data collection instrument to capture basic demographic information.
<input type="radio"/>	Classic Database	Contains six data entry forms, including forms for demography and baseline data, three monthly data forms, and concludes with a completion data form.
<input type="radio"/>	Human Cancer Tissue Biobank	Contains five data entry forms for collecting and tracking information for cancer tissue.
<input type="radio"/>	Longitudinal Database (1 arm)	Contains nine data entry forms (beginning with a demography form) for collecting data longitudinally over eight different events.
<input type="radio"/>	Longitudinal Database (2 arms)	Contains nine data entry forms (beginning with a demography form) for collecting data on

**Create Project** **Cancel**

\*For additional instructions on project setup, please refer to the resources provided at the end of this presentation.



# REDCap Project Home

- The typical REDCap user will always begin at the Project Home page
- To view all records for a project, click on **Record Status Dashboard**

**REDCap™**

Logged in as [username]  
Log out

My Projects  
Project Home or Project Setup  
REDCap Messenger  
Project status: **Production**

**Data Collection**

- Record Status Dashboard** (highlighted)
- Add / Edit Records
- Show data collection instruments ▼

**Applications** +  
**Help & Information** +

### ILAE/AES Joint Translational Taskforce CDEs

Project Home | Project Setup

**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.


**Project Dashboard**

The tables below provide general dashboard information, such as a list of all users with access to this project, general project statistics, and upcoming calendar events (if any).

Current Users (7)	
User	Expires
data.coordinator (Data Coordinator)	never

Project Statistics	
Records in project	0
Most recent activity	03/19/2020 4:28pm
Space usage for docs	0.00 MB

- Lists all subjects that have been entered into the database
- Shows the completion status of the forms (Incomplete, Unverified, Complete)



Logged in as **llewis** | [Log out](#)

[My Projects](#) or [Control Center](#)  
[Project Home](#) or [Project Setup](#)  
[REDCap Messenger](#)  
Project status: **Development**

**Data Collection** [Edit instruments](#)

**Record Status Dashboard**  
- View data collection status of all records

**Add / Edit Records**  
- Create new records or edit/view existing ones

Show data collection instruments ▼

**Applications**  
[Help & Information](#)

## ILAE/AES Joint Translational Taskforce CDEs

### 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 1: "1" through "2" ▼ of **2** records ALL (2) ▼ records per page

**Legend for status icons:**  
● Incomplete ○ Incomplete (no data saved) ?  
● Unverified ● ○ ● ○ ● Many statuses (all same)  
● Complete ● ○ ● Many statuses (mixed)

Animal ID	Core Animal Characteristics	Housing Repeatable	Diet Repeatable	Uploaded Files Repeatable	EEG/Video Data Acquisition	EEG Electrode Information	EEG Recording Electrodes Repeatable	Other Recording Electrodes Repeatable	EEG/Video Experimental Schedule/Log	Individual EEG/Video Recording Session Repeatable	EEG Scoring Method	EEG Scoring Method Supplemental Montage Information Repeatable
1	<span>●</span>	<span>○</span>	<span>○</span>	<span>○</span>	<span>○</span>	<span>○</span>	<span>○</span>	<span>○</span>	<span>○</span>	<span>○</span>	<span>○</span>	<span>○</span>
2	<span>●</span>	<span>○</span>	<span>○</span>	<span>○</span>	<span>○</span>	<span>○</span>	<span>○</span>	<span>○</span>	<span>○</span>	<span>○</span>	<span>○</span>	<span>○</span>

**Displaying:** [Instrument status only](#) | [Lock status only](#) | [All status types](#)
NOTE: Users may need to scroll to the right to view additional forms



# Add New Record

- Click **Add / Edit Records** in the sidebar to open the Add / Edit Records page
- All records must be given a unique ID
- Type in an ID and press enter or click the page to create the record
- If an existing ID is entered, you will be taken to the Record Home Page for that record – a duplicate ID will NOT be created

The screenshot displays the REDCap web application interface. On the left is a sidebar with the REDCap logo and navigation links: 'My Projects' or 'Control Center', 'Project Home' or 'Project Setup', and 'REDCap Messenger'. Below these, it shows 'Project status: Development'. The 'Data Collection' section includes 'Record Status Dashboard' and 'Add / Edit Records' (highlighted with a red box). The 'Applications' and 'Help & Information' sections are also visible.

The main content area is titled 'ILAE/AES Joint Translational Taskforce CDEs'. It features a section for 'Add / Edit Records' with instructions on how to view or create records. Below this, there is a 'Total records: 2' summary. The 'Choose an existing Animal ID' section contains a dropdown menu currently showing '-- select record --'. The 'Enter a new or existing Animal ID' section has a text input field. A 'Data Search' section follows, with a 'Choose a field to search' dropdown set to 'All fields' and a 'Search query' text input field.





# Record Home Page

- Displays all forms available for a specific record
- Pay close attention to the status icon color
  - Red – incomplete
  - Yellow – unverified
  - Green – complete
  - Gray – no data saved
  - Blue – multiple statuses  
*(repeated forms only)*
- Click on a **status icon** to begin entering data for a subject
- A record will not be created unless data is entered ***and saved*** in at least one form

## Record Home Page

Record "3" is a new Animal ID. To create the record and begin entering data for it, click any gray status icon below.

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.

### Legend for status icons:

● Incomplete    ● Incomplete (no data saved) ?  
● Unverified    ● ● ● Many statuses (all same)  
● Complete    ● Many statuses (mixed)

### NEW Animal ID 3

Data Collection Instrument	Status
Core Animal Characteristics	<span style="color: gray;">●</span>
Housing Repeatable	<span style="color: gray;">●</span>
Diet Repeatable	<span style="color: gray;">●</span>
Uploaded Files Repeatable	<span style="color: gray;">●</span>
EEG/Video Data Acquisition	<span style="color: gray;">●</span>
EEG Electrode Information	<span style="color: gray;">●</span>
EEG Recording Electrodes Repeatable	<span style="color: gray;">●</span>
Other Recording Electrodes Repeatable	<span style="color: gray;">●</span>
EEG/Video Experimental Schedule/Log	<span style="color: gray;">●</span>
Individual EEG/Video Recording Session Repeatable	<span style="color: gray;">●</span>
EEG Scoring Method	<span style="color: gray;">●</span>
EEG Scoring Method Supplemental Montage Information Repeatable	<span style="color: gray;">●</span>
EEG Scoring General Information	<span style="color: gray;">●</span>
EEG Scoring Background	<span style="color: gray;">●</span>
EEG Scoring Epileptiform Discharges	<span style="color: gray;">●</span>
EEG Scoring Seizures	<span style="color: gray;">●</span>
EEG Scoring Seizures Log Repeatable	<span style="color: gray;">●</span>
Physiology General Health Status	<span style="color: gray;">●</span>
Physiology Temperature	<span style="color: gray;">●</span>
Physiology Respiration	<span style="color: gray;">●</span>
Physiology Heart Rate	<span style="color: gray;">●</span>



# Enter and Save Data for a New Record

- Accurately complete all the fields in the form
  - Select **Complete** in the Form Status section
  - Click **Save & Exit Form** to save your entry

*Notice that the Subject Information status icon has now changed from gray to green*

**EEG Scoring Seizures**

Editing existing Animal ID 1

Animal ID 1

Was this assessment/procedure conducted? ☒ Yes ☐ No reset

Date that this CRF was filled out  31 M-D-Y

**7-a. EEG Scoring-Seizures**

Seizures captured? ☒ Yes ☐ No ☐ Unknown reset

If yes, how many seizures  If not collected enter -999

**Form Status**

Complete? ☒ Complete ←

**Lock this record for this form?**

If locked, no user will be able to edit this record on this form until someone with Lock/Unlock privileges unlocks it. ☐ **Lock**

→ **Save & Exit Form** **Save & ...** **-- Cancel --**

*Before Enter & Save*

Animal ID 1 Table not d

Data Collection Instrument	Status
Core Animal Characteristics	
Housing Repeatable	
Diet Repeatable	
Uploaded Files Repeatable	
EEG/Video Data Acquisition	
EEG Electrode Information	
EEG Recording Electrodes Repeatable	
Other Recording Electrodes Repeatable	

*After Enter & Save*

Animal ID 1 Table not d

Data Collection Instrument	Status
Core Animal Characteristics	
Housing Repeatable	
Diet Repeatable	
Uploaded Files Repeatable	
EEG/Video Data Acquisition	
EEG Electrode Information	
EEG Recording Electrodes Repeatable	
Other Recording Electrodes Repeatable	



# Repeatable Forms

- Forms that are designated “Repeatable” can be completed more than once for a single record
- Click on the **+** next to the status icon in the Record Home Page to begin a new instance of the form
  - This symbol only appears after at least one of the repeatable forms has been filled out
- A form’s **current instance** is indicated at the top of the form
- In the Save Options menu, you are given the option to **Save & Add a New Instance**

*If forms have different completion statuses, the status icon will appear blue*

Animal ID 1

Data Collection Instrument	Status
Core Animal Characteristics	
Housing Repeatable	
Diet Repeatable	
Uploaded Files Repeatable	
EEG/Video Data Acquisition	
EEG Electrode Information	

**Housing Repeatable**

Current instance: 2/2

Editing existing Animal ID 1 (Instance #2)

Animal ID: 1

Were housing conditions met? 1/2 2/2 + Add new

Yes ☐ No ☐

Date that this CRF was filled out:  M-D-Y

Type of housing:   
☐ Animal facility   
☐ EEG monitoring   
☐ Laboratory for behavioral tests   
☐ Imaging tests   
☐ Surgical procedures   
☐ Laboratory for other assessments   
☐ Other

Form Status

Complete? Incomplete

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.

Save & Exit Form Save & ...

-- Cancel --


Delete data for THIS

NOTE: To delete the entire record action drop-down

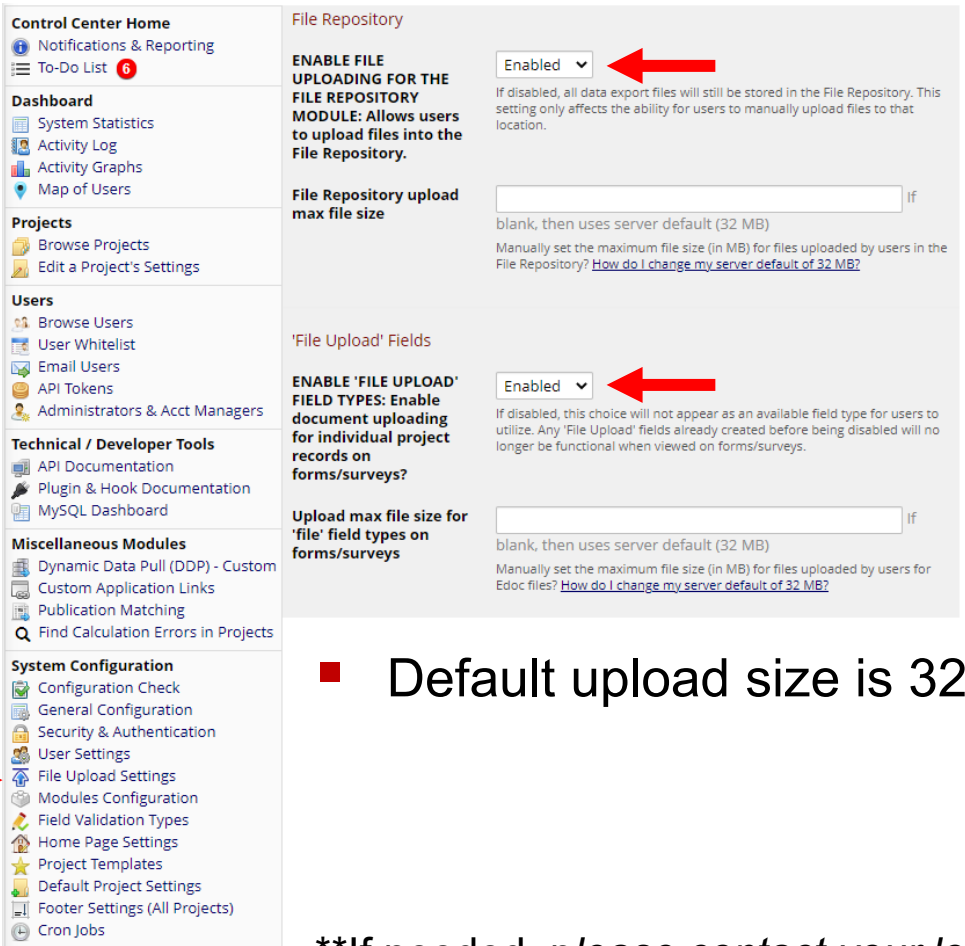
Save & Stay   
 Save & Add New Instance   
 Save & Go To Next Form   
 Save & Exit Record   
 Save & Go To Next Record



# Uploading Files

- File uploads are handled in two ways:
  1. Files for an individual record are uploaded to 'File Upload' fields in certain CRFs
  2. Files that apply to the entire project can be uploaded to the File Repository
  
- Follow the steps below to configure upload file settings:
  - Access the  **Control Center** from your institution's REDCap homepage\*
  - Locate System Configuration in the sidebar
  - Select **File Upload Settings**
  - Enable file uploading for both the **File Repository** and '**File Upload**' fields

\*Access to the Control Center is only available to your institution's REDCap administrators



**Control Center Home**

- Notifications & Reporting
- To-Do List 6

**Dashboard**

- System Statistics
- Activity Log
- Activity Graphs
- Map of Users

**Projects**

- Browse Projects
- Edit a Project's Settings

**Users**

- Browse Users
- User Whitelist
- Email Users
- API Tokens
- Administrators & Acct Managers

**Technical / Developer Tools**

- API Documentation
- Plugin & Hook Documentation
- MySQL Dashboard

**Miscellaneous Modules**


- Dynamic Data Pull (DDP) - Custom
- Custom Application Links
- Publication Matching
- Find Calculation Errors in Projects

**System Configuration**

- Configuration Check
- General Configuration
- Security & Authentication
- User Settings
- File Upload Settings**
- Modules Configuration
- Field Validation Types
- Home Page Settings
- Project Templates
- Default Project Settings
- Footer Settings (All Projects)
- Cron Jobs

**File Repository**

**ENABLE FILE UPLOADING FOR THE FILE REPOSITORY MODULE:** Allows users to upload files into the File Repository.

Enabled 


If disabled, all data export files will still be stored in the File Repository. This setting only affects the ability for users to manually upload files to that location.

File Repository upload max file size  if blank, then uses server default (32 MB)

Manually set the maximum file size (in MB) for files uploaded by users in the File Repository? [How do I change my server default of 32 MB?](#)

**'File Upload' Fields**

**ENABLE 'FILE UPLOAD' FIELD TYPES:** Enable document uploading for individual project records on forms/surveys?

Enabled 

If disabled, this choice will not appear as an available field type for users to utilize. Any 'File Upload' fields already created before being disabled will no longer be functional when viewed on forms/surveys.

Upload max file size for 'file' field types on forms/surveys  if blank, then uses server default (32 MB)

Manually set the maximum file size (in MB) for files uploaded by users for Edoc files? [How do I change my server default of 32 MB?](#)

- Default upload size is 32 MB\*\*

\*\*If needed, please contact your local IT department to increase upload file size



# File Upload Fields

- The ILAE/AES project contains many fields that require users to upload external files
- Uploaded files for an individual record will all be handled in a single form that can be repeated for each kind of file
- Users will be prompted to fill out an 'Uploaded Files' form when necessary

Copy of the cage card(s)

☒ Yes  
☐ No

If yes, see Uploaded Files form to upload a copy of the cage card(s).

- The 'Uploaded Files Repeatable' form can be found on the Record Home Page
- Select the **status icon** to begin

**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 ▼

Animal ID 1

Table not displayed

Data Collection Instrument	Status
Core Animal Characteristics	
Housing Repeatable	
Diet Repeatable	
Uploaded Files Repeatable	
EEG/Video Data Acquisition	



# File Upload Fields

- In the 'Uploaded Files' form, select the category of file you wish to upload

**Uploaded Files Repeatable**

Editing existing Animal ID 1

**Animal ID** 1

**Date that this CRF was filled out**  M-D-Y

**Please select the category of file to be uploaded** Core animal information

**Core Animal Information**

**Select core animal information files to upload**

- Core animal information
- Animal source
- Sex and related information
- Species and strain
- Housing
- Diet
- Behavior
- Pharmacology
- Physiology
- Histology/microscopy

- Select the specific file(s) you wish to upload for a category
- Enter the appropriate file name(s)
- Select **Upload document** and follow the on-screen instructions

**Please select the category of file to be uploaded** Core animal information

Select one. If uploading files for more than one category, please fill out an additional Uploaded Files form.

**Core Animal Information**

☒ Copy of cage card

☒ Study design

**Select core animal information files to upload**

☐ Surgical notes

☐ Other procedural data

Select all applicable. If uploading more than one of a single file type, please fill out an additional uploaded files form.

**Cage card uploaded file name**

**Cage card file upload** [Upload document](#)

**Study design uploaded file name**

**Study design file upload** [Upload document](#)



# File Upload Fields

- Save your form before exiting
- The next time the form is accessed, the uploaded file(s) will appear available for download by other users

## Please Note:

- Only one category can be selected per instance of the form
- One of each file in the selected category can be uploaded per form
- If additional files of the same kind need to be uploaded, you must fill out another instance of the form

### Uploaded Files Repeatable

Current instance: 1 / 1

Editing existing Animal ID 1

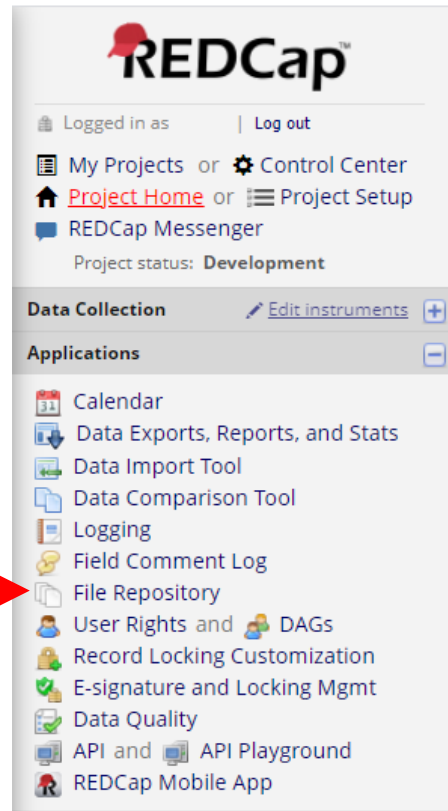
Animal ID	1
Date that this CRF was filled out	<input type="text"/> M-D-Y
Please select the category of file to be uploaded	<div>Core animal information </div> <small>Select one. If uploading files for more than one category, please fill out an additional Uploaded Files form.</small>
<b>Core Animal Information</b>	
Select core animal information files to upload	<div><input checked="" type="checkbox"/> Copy of cage card</div> <div><input checked="" type="checkbox"/> Study design</div> <div><input type="checkbox"/> Surgical notes</div> <div><input type="checkbox"/> Other procedural data</div> <small>Select all applicable. If uploading more than one of a single file type, please fill out an additional uploaded files form.</small>
Cage card uploaded file name	<input type="text" value="cage_card"/>
Cage card file upload	<div> cage_card.PNG (0.02 MB)</div> <div> Remove file or  Send-It</div>
Study design uploaded file name	<input type="text"/>
Study design file upload	<div> <a href="#">Upload document</a></div>
<b>Form Status</b>	
Complete?	<div>Complete </div>





# The File Repository

- Forms that apply to the entire project can be uploaded to the File Repository
- The **File Repository** is located in the Applications sidebar
- The File Repository is only available to those with approved access\*



## 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](#) [Upload New File](#)

To upload a new file to the repository, in the fields below specify the file on your computer and provide a name/label for the file. Then click the "Upload File" button.

+ Adding new file	
Document	<input type="button" value="Choose File"/> No file chosen
Name/Label	<div></div> <div>Expand</div>
	<input type="button" value="Upload File"/>
	<input type="button" value="-- Cancel --"/>

*\*For additional instructions on user access, please refer to the resources provided at the end of this presentation*





# Tools and Resources

- REDCap has many built in tools and applications that may be useful to your project
- Applications you have access to are found on the **Applications** sidebar of the project home screen
- Access to these applications can be customized on a user-by-user basis
- For additional instructions on project setup, user access, applications, etc., please refer to the **Help & Information** section

