



# Login and Navigation

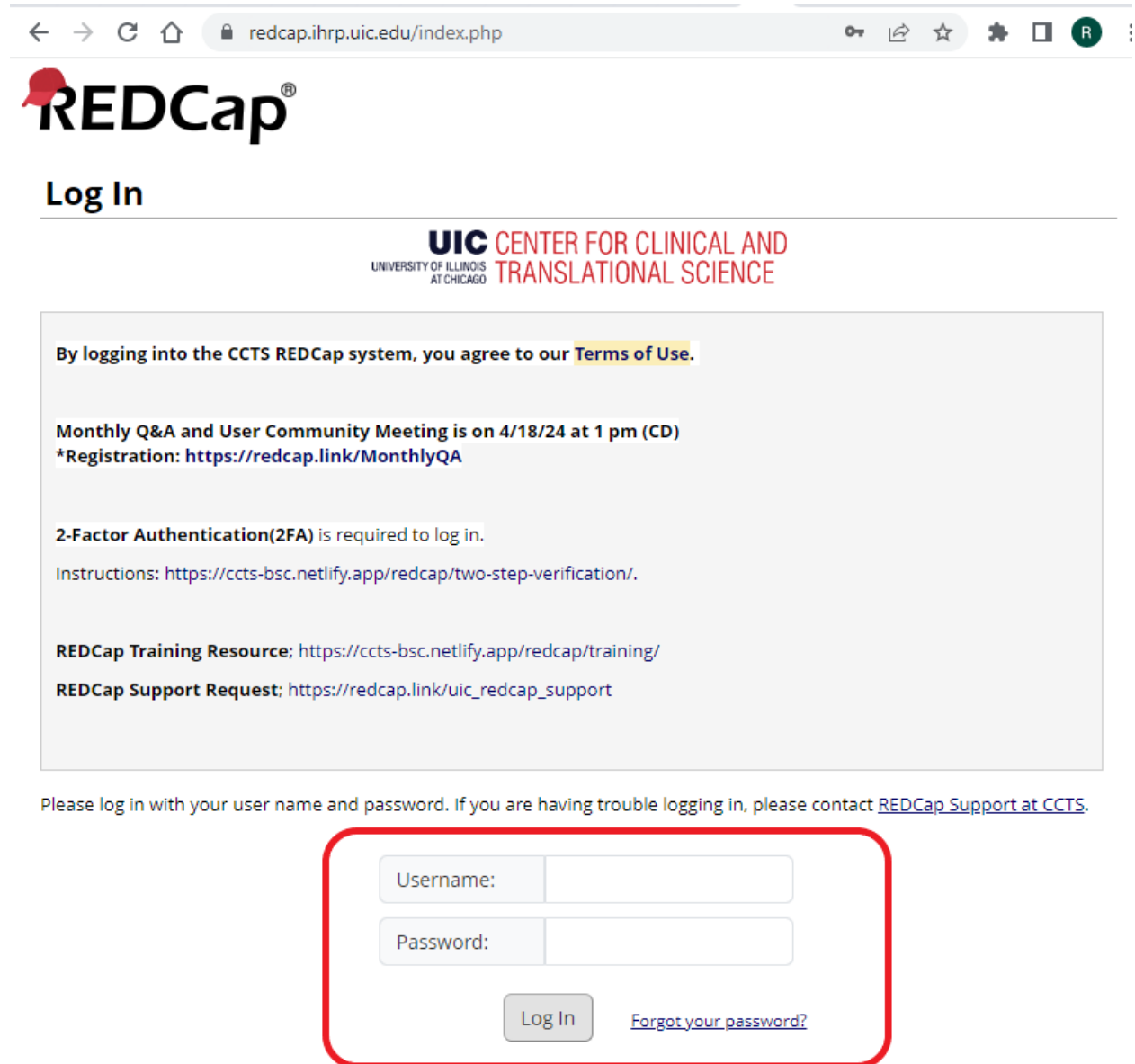
CCTS Biostatistics Core

April 2024

## Login

Access REDCap at <https://www.redcap.ihrp.uic.edu>. You will be prompted to log in with your username and password. Note that you must enter your REDCap username, not your email address.

If you don't yet have a REDCap username, please request an account at [https://redcap.link/uic\\_redcap\\_support](https://redcap.link/uic_redcap_support).



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# REDCap®

## Log In

**UIC** CENTER FOR CLINICAL AND  
UNIVERSITY OF ILLINOIS AT CHICAGO TRANSLATIONAL SCIENCE

By logging into the CCTS REDCap system, you agree to our [Terms of Use](#).

Monthly Q&A and User Community Meeting is on 4/18/24 at 1 pm (CD)  
\*Registration: <https://redcap.link/MonthlyQA>

**2-Factor Authentication(2FA)** is required to log in.  
Instructions: <https://ccts-bsc.netlify.app/redcap/two-step-verification/>.

**REDCap Training Resource:** <https://ccts-bsc.netlify.app/redcap/training/>  
**REDCap Support Request:** [https://redcap.link/uic\\_redcap\\_support](https://redcap.link/uic_redcap_support)

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

Username:

Password:

[Forgot your password?](#)

Figure 1: Login Page

### 2-Factor Authentication

UIC REDCap requires 2-Factor Authentication (2FA) as an additional step to verify your login credentials. There are three options for 2FA: [Duo](#), [MS/Google Authenticator](#), and [email verification](#).

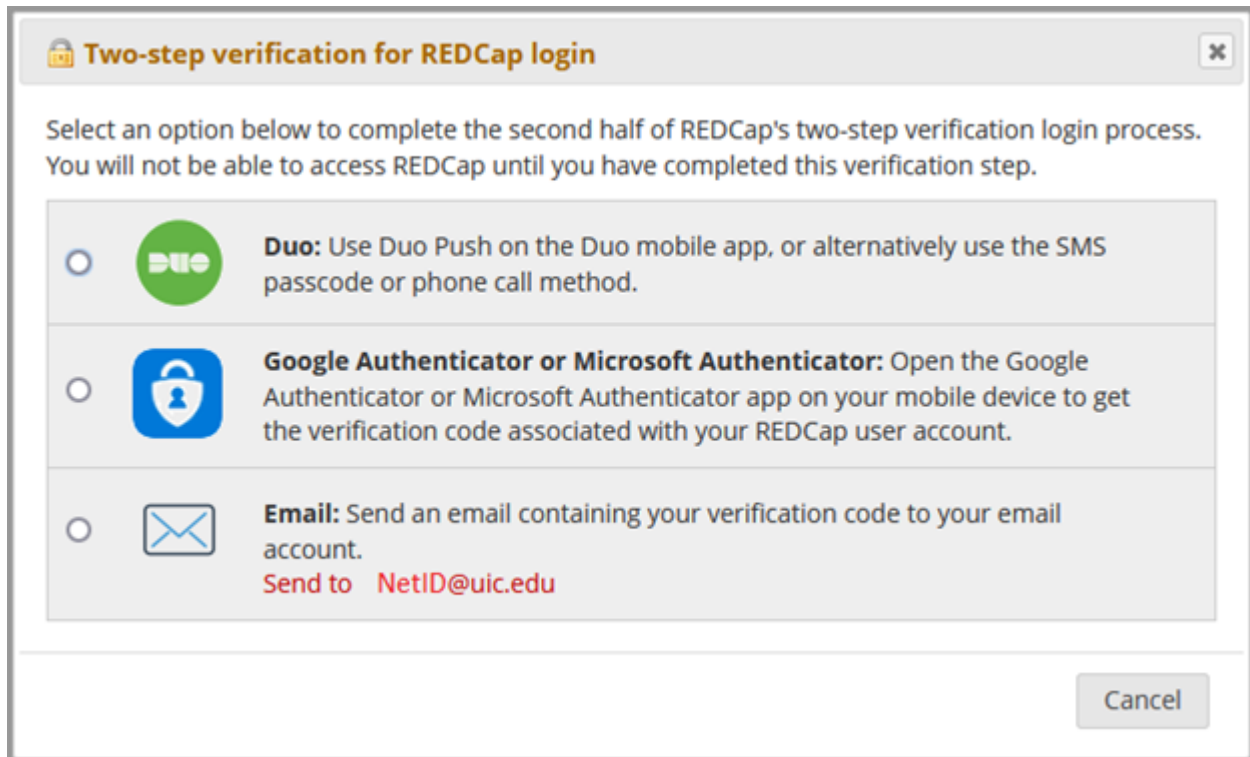


Figure 2: Two-Step Verification Methods

If you are currently using Duo authentication for UIC websites, you can use the same app for REDCap. Once your login is verified via Duo on your device, it will be remembered so that you don't need to do 2FA for 7 days.

Non-UIC REDCap users need to use email verification first, and set up MS/Google Authenticator if they want to use the apps instead of email verification.

2FA is essential to web security because it's an additional layer of security that can immediately neutralize the risks associated with compromised passwords. For example, if a password is phished, hacked, or even guessed, an intruder will not be granted access without approval from the second factor. Thus, a password alone is insufficient to access systems protected by 2FA. Additionally, an unanticipated 2FA authentication request can inform the account owner that their password is compromised so that they can immediately change their password. Finally, 2FA is a requirement of the CMMC and NIST 80-171 frameworks that enable researchers to engage in research projects with federal agencies and other partners that require high levels of information security assurance.

### Option 1: DUO

1. Download the DUO app to your mobile device
  - **Internal Users:** Faculty and Staff within the University of Illinois System should have already downloaded and registered with Duo Security as it is the preferred 2-Factor authentication method of the University.
  - **External Users:** Users outside the University System will not be able to use the DUO option as they are not and cannot be registered within the "NetID Center."
2. Log into REDCap as usual and then select the "DUO" option on screen
3. Select the method you prefer: "Send Me a Push," "Call Me," or "Enter a Passcode"

- **Send Me a Push** will send a push notification to the registered smartphone allowing you to approve or deny the request.
- **Call Me** will initiate a phone call to your smart phone. Answer the call and press any key to authenticate.
- **Enter a Passcode** can be used to generate passcodes even while offline.

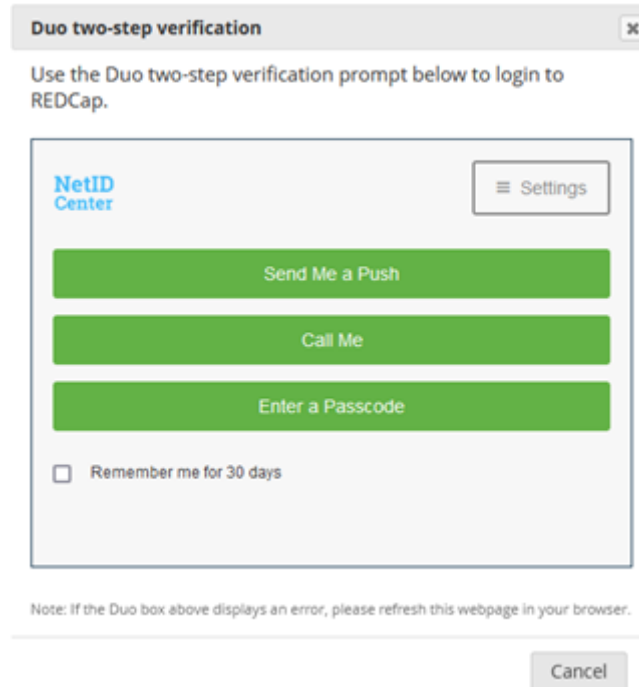


Figure 3: Duo Two-Step Verification

**Option 2: Google Authenticator or Microsoft Authenticator** To use two-step verification to log in to REDCap using Google Authenticator or Microsoft Authenticator mobile app **for the first time**, do the following:

1. Download the Google Authenticator or Microsoft Authenticator app to your mobile device Download the app by searching for 'Google Authenticator' or 'Microsoft Authenticator' in your mobile device's app store (e.g., Apple App Store, Google Play Store).

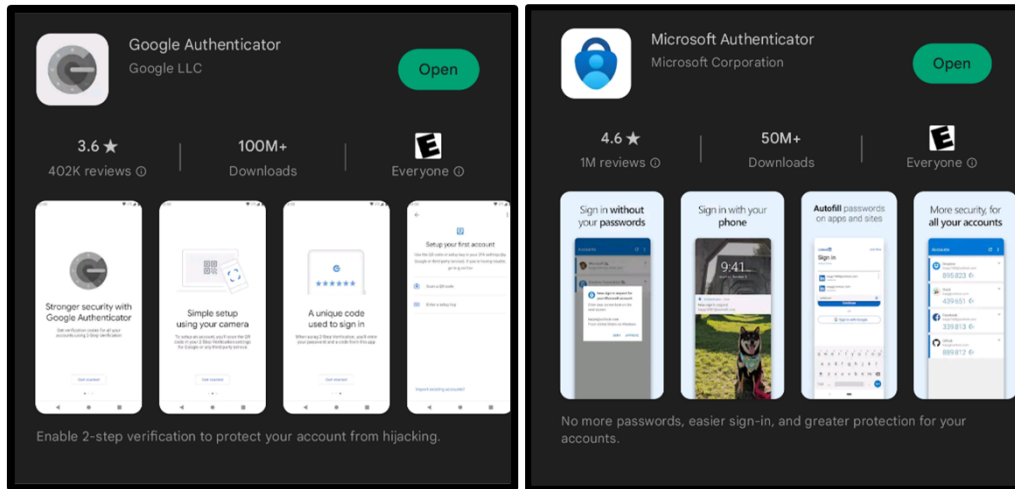


Figure 4: Google Authenticator; Microsoft Authenticator

2. Log into REDCap as usual and then select the “Email” option. (See Option 3 instructions in this document.)
3. Click on “Profile” on the upper right corner
4. Select “Set up Google Authenticator or Microsoft Authenticator for two-step login” under “Login-related options”

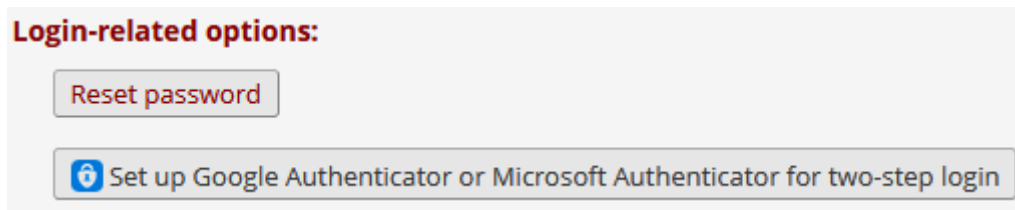


Figure 5: Login-related options


5. Instructions and a QR code will open on screen. Open the app, and scan the QR code on the screen.

**Set up Google Authenticator or Microsoft Authenticator for two-step login**

To use two-step verification to log in to REDCap using Google Authenticator or Microsoft Authenticator mobile app, you will need to first download the app onto your mobile device. Use a link below to download the app on your mobile device.

**1) Download the Google Authenticator or Microsoft Authenticator app to your mobile device**  
Download the app by searching for 'Google Authenticator' or 'Microsoft Authenticator' in your mobile device's app store (e.g., Apple App Store, Google Play Store).

**2) Open the app, and scan this QR code** [View QR code in separate window](#)



If you're having trouble scanning the QR code, enter the values below into your Google Authenticator app using the Manual Entry method. Also, make sure you set it as 'Time-based'.

Account: `example@ccts-red-dev2.ihrp.uic.edu`  
Key/secret: Will be provided on screen

**3) Use the app when you log in to REDCap**  
After you have scanned the QR code using the Google Authenticator or Microsoft Authenticator app, you can open the app at any time in the future to obtain your verification code for REDCap. The verification code is always changing, so it will be different each time you log in. **NOTE: The app does not require an internet connection** on your device in order to work.

Figure 6: Authenticator QR Code

6. Log out of REDCap to test the app.
7. Use the app when you log in to REDCap.

After you have scanned the QR code using the Google Authenticator or Microsoft Authenticator app, you can open the app at any time in the future to obtain your verification code for REDCap. The verification code is always changing, so it will be different each time you log in. **NOTE: The app does not require an internet connection** on your device in order to work.

### Option 3: Email

1. Log into REDCap as usual and then select the "Email" option on screen.
2. An email will be sent to the email account connected with your REDCap user name.
3. Copy the verification code you receive via email—it expires in 2 minutes—and enter it into the blue box next to "Submit."

Figure 7: Enter your emailed verification code.

4. Click on “Submit.”

## Navigation

### Home Page

When you first log into REDCap, you will arrive at the home screen. The page includes an overview of REDCap’s features, citation guidelines, and links to training resources and the [support request form](#). The tabs along the top of the page allow you to access different components of REDCap. To return to this page at any time, click [Home](#).

Figure 8: Home Screen

### My Projects

If you have access to any existing REDCap projects, you will see them listed on the My Projects tab. Click on the title of a project to open it.

Listed below are the REDCap projects to which you currently have access. Click the project title to open the project. [Read more](#) To review which users still have access to your projects, visit the [User Access Dashboard](#).

Project Title	PID	Records	Fields	Instruments	Type	Status
Demo Project: Alerts & Notifications	13839	2	25	3 surveys	■	🔧

REDCap 14.2.1 - © 2024 Vanderbilt University

Figure 9: My Projects

If you have access to many projects, you may wish to organize them into folders. Click **Organize** (visible in the previous image) to create folders and assign projects to them.

Project Folders are a way to organize the projects on your My Projects page by putting them into groups. You may create new folders below and then assign your projects to them on the right. A project can be assigned to multiple folders at the same time. To reorder your folders, you can drag and drop them in the left-hand table. Note: Only you can see your folders; they are for your own personal organization. **If you wish to simply hide projects from your My Projects list, you may put them in the 'My Hidden Projects' folder, which will keep them in an always-collapsed folder at the bottom of the My Projects page.**

**STEP 1: Create Folders**

My Folders

My Folders		
Demo Projects	✎	✖
[ My Hidden Projects ]		

**STEP 2: Assign Projects To Folders**

Demo Projects

Hide projects already assigned

My Projects: Select projects below to add to this folder

Demo Project: Alerts & Notifications

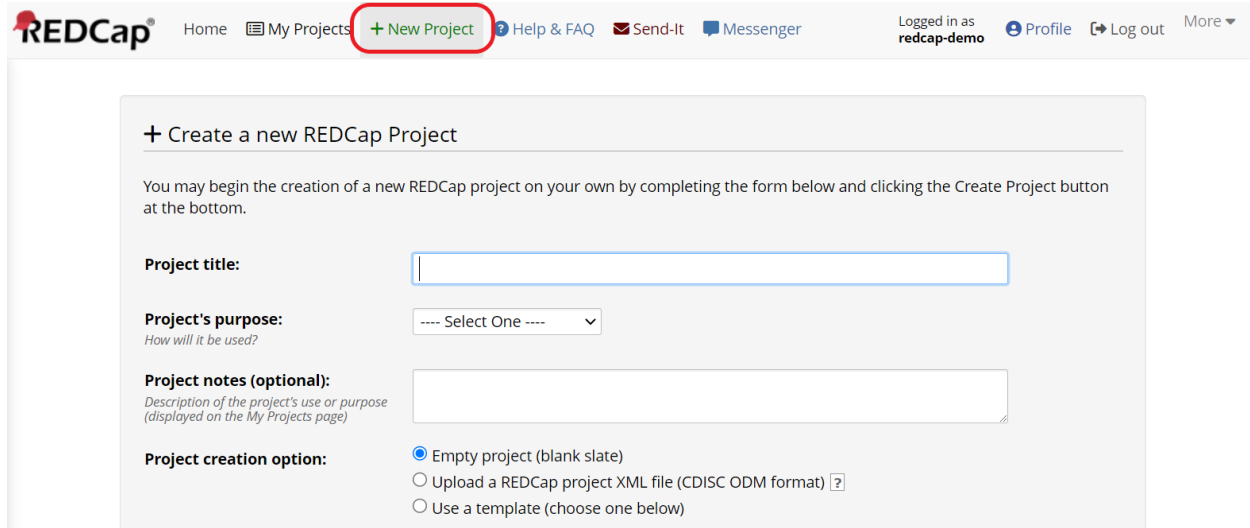
Figure 10: Organize Projects

## New Project

To create a new project, click **+ New Project**. You will be prompted to provide information about the project. See the [Creating Projects](#) pages for detailed instructions.

Note that only Full-Access REDCap users can create new projects. Access-Only users will not see the **+ New Project** tab. To request an upgrade from an Access-Only account to a Full-Access account, please [submit a support request](#).





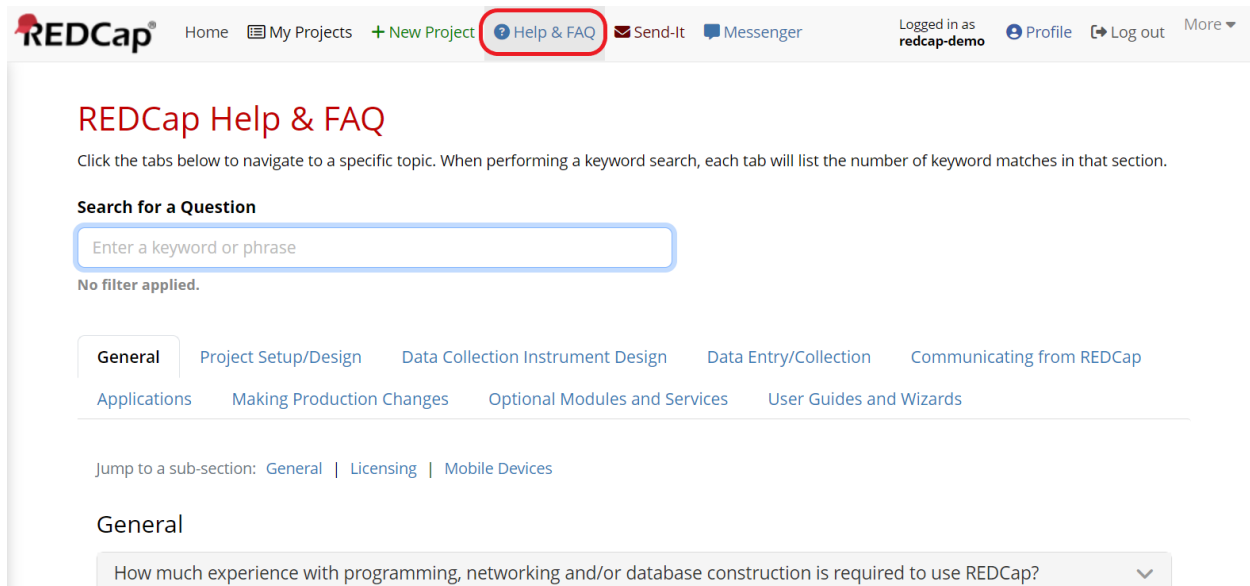
The screenshot shows the REDCap user interface. At the top, the navigation bar includes 'Home', 'My Projects', '+ New Project' (highlighted with a red circle), 'Help & FAQ', 'Send-It', and 'Messenger'. On the right, it shows 'Logged in as redcap-demo', 'Profile', 'Log out', and 'More'. The main content area is titled '+ Create a new REDCap Project'. Below the title, there is a paragraph of introductory text. The form contains the following fields and options:

- Project title:** A text input field.
- Project's purpose:** A dropdown menu with the text '---- Select One ----' and a sub-label 'How will it be used?'.
- Project notes (optional):** A text area with a sub-label 'Description of the project's use or purpose (displayed on the My Projects page)'.
- Project creation option:** Three radio buttons:
  - Empty project (blank slate)
  - Upload a REDCap project XML file (CDISC ODM format) [?]
  - Use a template (choose one below)

Figure 11: New Project

## Help & FAQ

Click Help & FAQ to access REDCap's built-in user manual. You can browse topics or search for specific keywords.



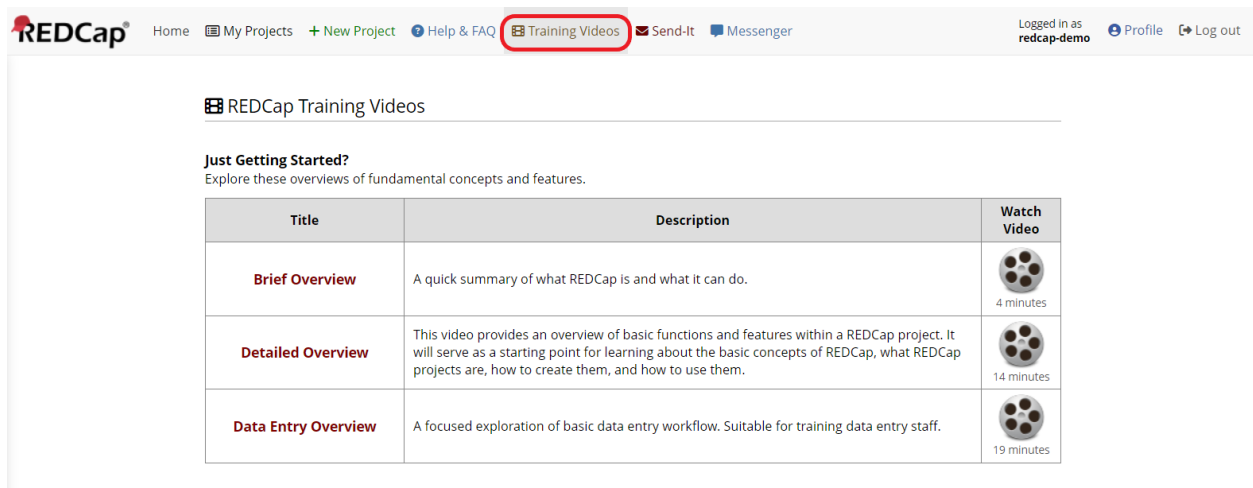
The screenshot shows the REDCap 'Help & FAQ' page. The navigation bar is similar to the previous screenshot, but 'Help & FAQ' is highlighted with a red circle. The main content area is titled 'REDCap Help & FAQ'. Below the title, there is a paragraph of introductory text. The page features a search bar with the placeholder text 'Enter a keyword or phrase' and a sub-label 'No filter applied.'. Below the search bar, there are several tabs for navigation: 'General', 'Project Setup/Design', 'Data Collection Instrument Design', 'Data Entry/Collection', 'Communicating from REDCap', 'Applications', 'Making Production Changes', 'Optional Modules and Services', and 'User Guides and Wizards'. Below the tabs, there is a section titled 'General' with a dropdown menu containing the text 'How much experience with programming, networking and/or database construction is required to use REDCap?'.

Figure 12: Help and FAQ

Note that the UIC REDCap support team has also developed instructional videos and training materials, accessible at <https://ccts-bsc.netlify.app/redcap>.

## Training Videos

REDCap's developer, Vanderbilt University, has provided instructional videos on several topics, including basic functions and special features. Access these videos on the Training Videos tab.



**REDCap Training Videos**

**Just Getting Started?**  
Explore these overviews of fundamental concepts and features.




Title	Description	Watch Video
<b>Brief Overview</b>	A quick summary of what REDCap is and what it can do.	 4 minutes
<b>Detailed Overview</b>	This video provides an overview of basic functions and features within a REDCap project. It will serve as a starting point for learning about the basic concepts of REDCap, what REDCap projects are, how to create them, and how to use them.	 14 minutes
<b>Data Entry Overview</b>	A focused exploration of basic data entry workflow. Suitable for training data entry staff.	 19 minutes

Figure 13: Training Videos

Note that the UIC REDCap support team has also developed instructional videos and training materials, accessible at <https://ccts-bsc.netlify.app/redcap>.

### Send-It

The `Send-It` tab allows for secure file transfer through REDCap, including to individuals without a REDCap account. As the official documentation explains:

Send-It is a secure data transfer application that allows you to upload a file (up to 50 MB in size) and then allow multiple recipients to download the file in a secure manner. Each recipient will receive an email containing a unique download URL, along with a second follow-up email with the password (for greater security) for downloading the file. The file will be stored securely and then later removed from the server after the specified expiration date. Send-It is the perfect solution for anyone wanting to send files that are too large for email attachments or that contain sensitive data.

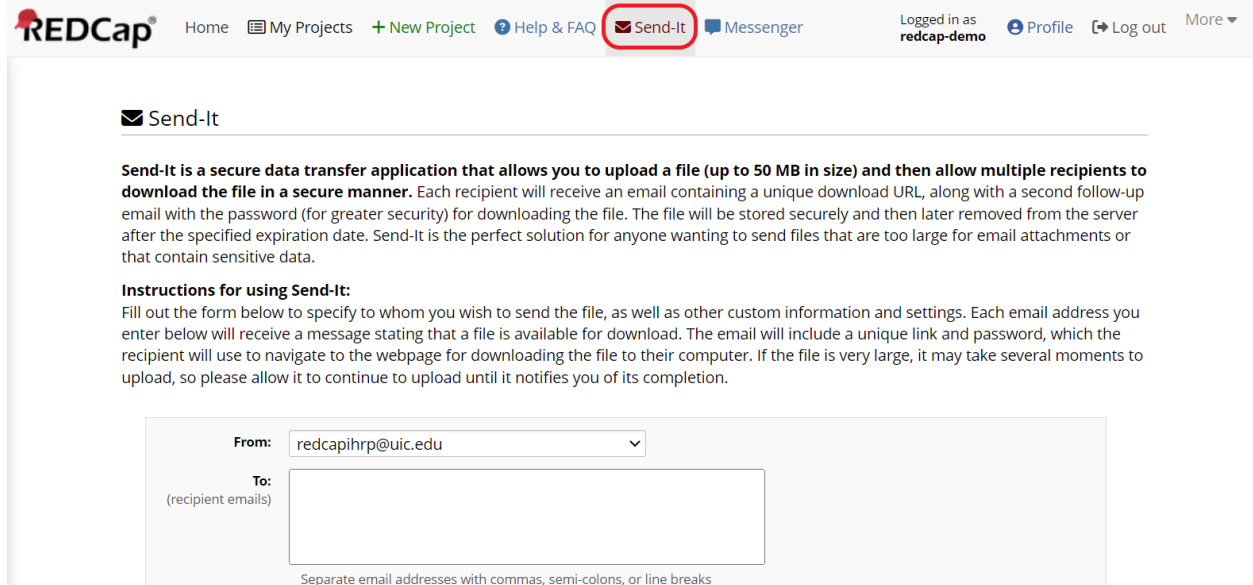


Figure 14: Send it

## Messenger

Use the REDCap Messenger for private communication with individuals or groups within the REDCap platform.

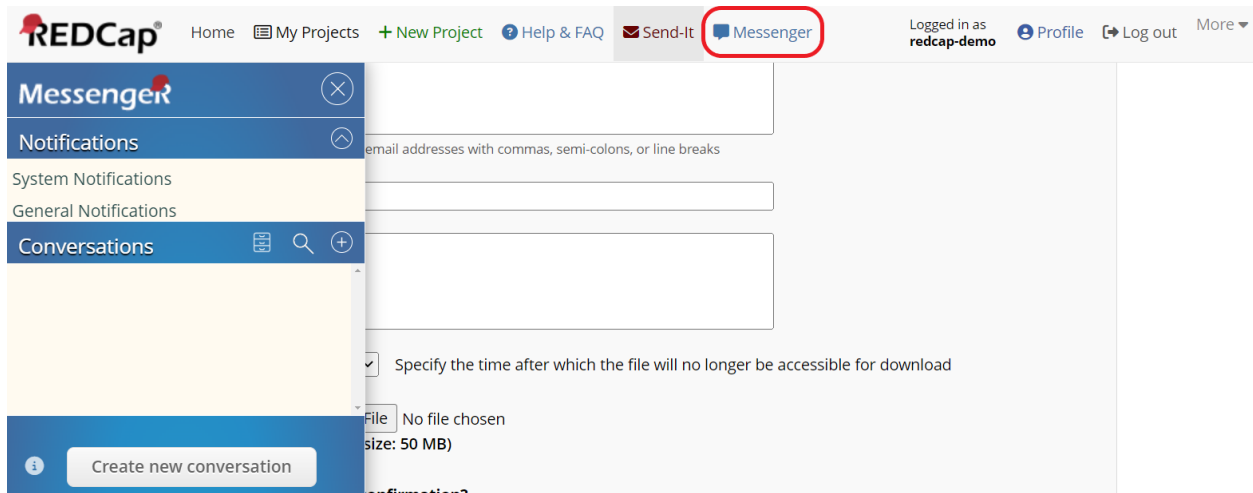


Figure 15: Messenger

## Profile

Click **Profile** to view and edit information about your REDCap user account.

**Basic Information** Modify your primary email address and add a phone number. You cannot change your first or last name on this page. To request a change to your name, please [contact the REDCap administrator](#).

**REDCap** Home My Projects + New Project Help & FAQ Send-It Messenger Logged in as redcap-demo **Profile** Log out More ▾

## Edit Your User Profile

If you wish, you may edit your User Profile information below. This information will not be given out to anyone but will be used to help us better keep track of who is using REDCap and also in case you need to be contacted regarding your access to REDCap.

**Basic Information**

First name: \_\_\_\_\_

Last name: \_\_\_\_\_

Primary email:  \_\_\_\_\_

Phone number: \_\_\_\_\_

Mobile phone number: \_\_\_\_\_

**Demo Account**

Tip: To enter a number with an extension, place a comma between the number and the extension.

Figure 16: Profile

**Login-related Options** Use this section to change your password or set up multi-factor authentication.

**Login-related options:**

Figure 17: Profile Login

**Additional Options** You will receive all communications from REDCap, including password resets and other account-related emails, at your primary email address.

However, you may add a secondary or tertiary email address for use by you when sending messages from REDCap (e.g., as the “From” address on survey invitations for your study participants).

**Additional Options**

While your primary email address is used for receiving emails and notifications from REDCap, your secondary and tertiary email addresses can only be used when sending out emails from REDCap (e.g., sending survey invitations), in which they appear as the 'From' address in the email.

Secondary email:

Tertiary email:

Figure 18: Secondary Email

**User Preferences** Use this section to set date and number formatting preferences.

**User Preferences**

Set your preferences for how dates, timestamps, and numbers appear to you in REDCap.

Date and time format:  ▼  
(e.g., 12/31/2004 22:57 or 31/12/2004 10:57pm)

Number format - decimal character:  ▼  
(e.g., 3.14 or 3,14)

Number format - thousands separator:  ▼  
(e.g., 1,000,000 or 1.000.000 or 1 000 000)

Delimiter for CSV file downloads:  ▼  
(e.g., "record,age,bmi" or "record;age;bmi")

Figure 19: Preferences

**Notification Preferences for REDCap Messenger** Define when and how you want to receive notifications about messages sent in REDCap Messenger.

**Notification Preferences for REDCap Messenger**

If you receive a message while you are not logged in to REDCap, Messenger will send an email informing you of any unread messages (note: the email will \*not\* contain the message text itself). Below you may adjust your preferences for how often you want to receive email notifications from REDCap Messenger.

Frequency of email notifications for any new messages received:  ▼

Enable instant email notifications for 'Important' messages and messages where you are tagged (@username)? This overrides the frequency setting above.  (If checked, always send an email when tagged or when receiving an 'Important' message.)

Enable email notifications for General Notifications (sent by REDCap administrators) and System Notifications (updates about new features)?

Figure 20: Messenger Preferences