

**Transcript of:** Scheduling Project

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**Video length:** 3:12

**REDCap version featured:** 5.6.0 (standard branch)

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*Audio is in normal text below. Timestamps are in bold to assist in finding specific topics.*

**(0:00)**

A longitudinal plus scheduling project is one of the most complex project types in REDCap. It allows for repeated use of data collection instruments, and it automatically populates the calendar with record-specific events. Calendar events can then be used to enter data.

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The longitudinal module allows completion of the same instruments multiple times over a specific series of events. Multiple data entry forms are usually defined.

**(0:37)**

Forms are displayed in a grid. This illustrates how forms can be completed repeatedly for a single record. In this example, the project is a large clinical drug trial. Two groups of patients are represented by two arms. The days offset column is particularly important in this project type. These grids define how the scheduling module functions. The event grids and designated instruments differ between arms. Additional details about defining a longitudinal grid and designating instruments for events can be found in the longitudinal project type video.

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The scheduling module is an optional additional feature only available in longitudinal projects. The scheduler is primarily used to maintain a project calendar. Additional details about using the scheduling module can be found in a separate video.

**(1:38)**

The scheduling module creates new records and creates schedules for the calendar. It relies on the pre-defined longitudinal event grids. Based on the start date, REDCap schedules the remaining events according to the days offset in the selected arm. These record-specific events are then added to the calendar.

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The calendar can be used to open any records that have already been scheduled. When opening a scheduled event, a list is displayed containing the instruments designated for that event. This approach is particularly useful when doing patient research. Visits on the calendar are easier to find than scrolling through a large Dashboard.

**(2:34)**

New record-specific events can be added directly on the calendar page. These will however not be used for data entry. Only events added through the scheduling page are linked to the data entry grid.

**(2:53)**

The Add/Edit Records page and the Dashboard are also still used to open existing records. New records can still be created through the Add/Edit Records link. They cannot however be scheduled there. Scheduling is only possible on the scheduling page.