

# Getting Started with Survey Design Using Research Electronic Data Capture (REDCap)



G R E A T P L A I N S  
IDeA | Clinical and  
Translational Research

Biostatistics, Epidemiology, and Research Design  
Key Component Area

# PRESENTATION OBJECTIVES

- Objectives of this module
  - Build a survey using Research Electronic Data Capture (REDCap)
- This module will show you how to:
  - Start building a survey
  - Use different question/answer formats
  - Use skip-logic
  - Use piping
  - Use validation

# SPECIAL NOTES ABOUT REDCAP

Only people with UNMC IDs will be allowed to access the specific website mentioned in this presentation. If your institution has REDCap, please refer to your home institution's REDCap page to log in.

# SPECIAL NOTES ABOUT REDCAP


- This module will only go over the basics of how to design a survey.  
**Please thoroughly read REDCap's instructions regarding rules related to IRB, data collection, moving projects to production status, fees, etc.**
- For more information about REDCap and other research IT needs, please visit UNMC's Research Information Technology Office (RITO) page:
- <https://www.unmc.edu/vcr/rito/>

# SPECIAL NOTES ABOUT REDCAP

You will notice that REDCap has many ‘How To’ videos throughout its website. These videos are a great way to help you learn how to use REDCap. There won’t be too much emphasis on those videos in this tutorial, but know that they are highly recommended if you want to learn more about REDCap!



To begin, go to (note this link is specific to UNMC):  
<https://unmcredcap.unmc.edu/redcap/index.php>



**REDCap™**

**Log In**

**University of Nebraska Medical Center**

All UNMC students, faculty, and staff already have access to this system -- use your standard UNMC username and password below (but do not include UNMC\_DOMAIN\ before your username).

A username and password can also be assigned by the Research IT Office to non-UNMC personnel.

**Research IT Office Announcements**

- Please review our [REDCap Usage & Fees Policy](#), which takes effect July 1, 2016.
- Contact us if you need technical information about UNMC's REDCap deployment for your IRB Application.

Please log in with your user name and password. If you are having trouble logging in, please contact [your project administrator](#). Project Administrators and UNMC faculty and staff may contact the UNMC Research IT Office (RITO) by [clicking here](#).

Username:

Password:

[Forgot your password?](#)

**Welcome to REDCap!**

REDCap is a mature, secure web application for building and managing online surveys and databases. Using REDCap's stream-lined process for rapidly developing projects, you may create and design projects using 1) the online method from your web browser using the Online Designer; and/or 2) the offline method by constructing a 'data dictionary' template file in Microsoft Excel, which can be later uploaded into REDCap. Both surveys and databases (or a mixture of

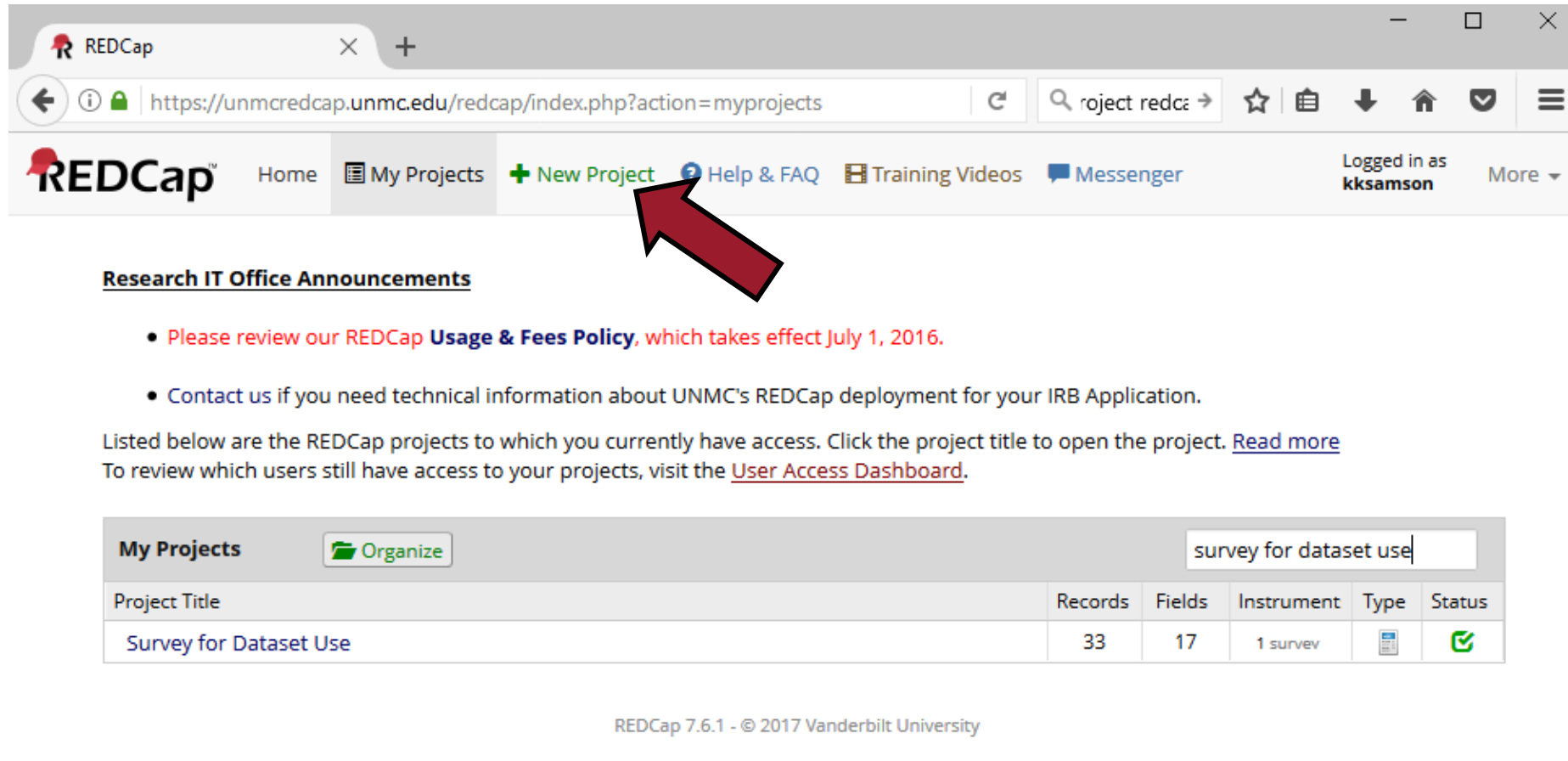
**REDCap Features**

**Build online surveys and databases and securely** - Create and design your rapidly using secure web authentication your browser. No extra software is required.

**Fast and flexible** - Conversion to production

Enter your UNMC user ID and password (same as your email), then click "Log In". If you haven't used REDCap before, you may have to verify your account via email. Simply follow the instructions REDCap gives.

You will be taken to your home page which lists your projects (or a Welcome page if this is your first time using REDCap). To create a new project, click “New Project”



REDCap

Home My Projects **+ New Project** Help & FAQ Training Videos Messenger

Logged in as **kksamson** More ▾

**Research IT Office Announcements**

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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](#).

**My Projects** [Organize](#)

Project Title	Records	Fields	Instrument	Type	Status
<a href="#">Survey for Dataset Use</a>	33	17	1 survey		

REDCap 7.6.1 - © 2017 Vanderbilt University

Type in a Project Title, select the Purpose of your project, select "Create an empty project" and then click "Create Project"

The screenshot shows the REDCap 'Create a new REDCap Project' form. The form includes the following fields and options:

- Project title:** A text input field containing 'Example Survey for Training'. Below it, a smaller text says 'Title to be displayed on project webpage'.
- Purpose of this project:** A dropdown menu with 'Practice / Just for fun' selected. Below it, a smaller text says 'How will it be used?'.
- Project notes (optional):** A text area for 'Comments describing the project's use or purpose that are displayed on the My Projects page.'
- Start project from scratch or begin with a template:** A section with three radio button options:
  - ☒ Create an empty project (blank slate)
  - ☐ Upload a REDCap project XML file (CDISC ODM format) [?]
  - ☐ Use a template (choose one below)
- Choose a template:** A section with a table of templates. The table has columns for 'Select template', 'Template title (sorted by title)', and 'Template description'.

At the bottom of the form, there are two buttons: 'Create Project' and 'Cancel'. Red arrows point to the 'Project title' field, the 'Purpose of this project' dropdown, the 'Create an empty project' radio button, and the 'Create Project' button.

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.



You will now see your project's home page. To start designing your survey, click "Online Designer"

REDCap™

Logged in as **kksamson** | Log out

My Projects

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

- Calendar
- Data Exports, Reports, and Stats
- Data Import Tool
- Data Comparison Tool
- Logging
- Field Comment Log
- File Repository
- User Rights and DAGs
- Data Quality
- REDCap Mobile App

Help & Information

- Help & FAQ
- Video Tutorials
- Suggest a New Feature

Contact REDCap administrator

## University of Nebraska Medical Center

University of Nebraska Medical Center

### Example Survey for Training

Project Home Project Setup Other Functionality

Project Revision History

✓ **Your new REDCap project has been created and is ready to be accessed.**  
You may now begin exploring your project and the many features available to you. Below are some instructions to help you get started.

Project status: Development Completed steps 0 of 7

#### Main project settings

Not started

Enable Use surveys in this project? [?](#)

[VIDEO: How to create and manage a survey](#)

Enable Use longitudinal data collection with defined events? [?](#)

[I'm done!](#)

Modify project title, purpose, etc.

#### Design your data collection instruments

Not started

[I'm done!](#)

Add or edit fields on your data collection instruments. This may be done by either using the Online Designer (online method) or by uploading a Data Dictionary (offline method). Quick links: [Download PDF of all instruments](#) OR [Download the current Data Dictionary](#)

Go to [Online Designer](#) OR [Data Dictionary](#)

You may also browse for data collection instruments in the [REDCap Shared Library](#)

Have you checked the [Check For Identifiers](#) to ensure all identifier fields have been tagged?

You now see the home page for the surveys for this project.

To change the name of your survey (the default is “My First Instrument”), click the “Choose Action” button and select “Rename”.

Example Survey for Training

University of Nebraska Medical Center

Example Survey for Training

Project Home | Project Setup | Online Designer | Data Dictionary

Create snapshot of instruments | VIDEO: How to use this page

Last snapshot: never

The Online Designer will allow you to make project modifications to fields and data collection instruments very easily using only your web browser. NOTE: While in development status, all field changes will take effect immediately in real time.

Add new instrument:

- Create a new instrument from scratch
- Import a new instrument from the official REDCap Shared Library
- Upload instrument ZIP file from another project/user or external libraries

Instrument name	Fields	View PDF	Instrument action
My First Instrument	1		Choose action

Choose action

- Rename
- Copy
- Delete
- Download instrument ZIP

The REDCap Consortium | Citing REDCap | UNMC | UNMC McGoogan Library

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Type in the new instrument name you want and then click "Save".

Example Survey for Training

University of Nebraska Medical Center

Example Survey for Training

Project Home Project Setup Online Designer Data Dictionary

Create snapshot of instruments VIDEO: How to use this page

Last snapshot: never

The Online Designer will allow you to make project modifications to fields and data collection instruments very easily using only your web browser. NOTE: While in development status, all field changes will take effect immediately in real time.

Add new instrument:

Create a new instrument from scratch

Import a new instrument from the official REDCap Shared Library

Upload instrument ZIP file from another project/user or external libraries

Instrument name	Fields	View PDF	Instrument actions
Example Survey	1		Choose action

REDCap 7.6.1 - © 2017 Vanderbilt University



Click on your new survey name to start building your survey.

Example Survey for Training

Logged in as kksamson | Log out

My Projects  
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 ▼

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- Data Exports, Reports, and Stats
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- Logging
- Field Comment Log
- File Repository
- User Rights and DAGs
- Data Quality
- REDCap Mobile App

Help & Information

- Help & FAQ
- Video Tutorials
- Suggest a New Feature

[Contact REDCap administrator](#)

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Example Survey for Training

[Project Home](#) [Project Setup](#) [Online Designer](#) [Data Dictionary](#)

Create snapshot of instruments  
Last snapshot: never ?

VIDEO: How to use this page

The Online Designer will allow you to make project modifications to fields and data collection instruments very easily using only your web browser. NOTE: While in development status, all field changes will take effect immediately in real time.

Add new instrument:

- Create a new instrument from scratch
- Import a new instrument from the official REDCap Shared Library
- Upload instrument ZIP file from another project/user or external libraries

Instrument name	Fields	View PDF	Instrument actions
Example Survey	1		<a href="#">Choose action</a>

Example Survey for Training X

https://unmcrcdcap.unmc.edu

**REDCap™**

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My Projects

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**

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- REDCap Mobile App

**Help & Information**

- Help & FAQ
- Video Tutorials
- Suggest a New Feature

Contact REDCap administrator

**Medical Center**  
University of Nebraska Medical Center

**Example Survey for Training**

Project Home Project Setup Online Designer Data Dictionary

Create snapshot of instruments  
Last snapshot: never

VIDEO: How to use this page

This module will allow you to create new data collection instruments/surveys or edit existing ones. Changes may be made by either using the **Online Designer** or **Upload Data Dictionary** (see tabs above), in which you may use either method or both. The Online Designer may help you get some initial fields/forms built quickly or to make quick edits, but using the Data Dictionary file may be more helpful if you will be adding a large number of fields for this project.

This page allows you to build and customize your data collection instruments one field at a time. You may add new fields or edit existing ones. New fields may be added by clicking the **Add Field** buttons. You can begin editing an existing field by clicking on the **Edit** icon. If you decide that you do not want to keep a field, you can simply delete it by clicking on the **Delete** icon. To reorder the fields, simply **drag and drop** a field to a different position within the form below. NOTE: While in development status, all field changes will take effect immediately in real time.

Return to list of instruments

Current instrument: **Example Survey** Preview instrument

Variable: record\_id

**Record ID**

NOTE: The field above is the record ID. It cannot be deleted or moved. It can only be edited.

Add Field Add Matrix of Fields

Your survey has a default variable, which is the record ID. This is required for all surveys. To add a new variable, click the "Add Field" Button.



The first item you must specify is the field type. This presentation will not cover all field types, but will introduce you to a few to get comfortable using the software.

**Add New Field**

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

Field Type: ---- Select a Type of Field ----

[VIDEO: How to use this page](#)

[Add Field](#) [Add Matrix of Fields](#)

It is highly recommended that you watch the “Field Types Video” to learn more about what REDCap can do – it may save you from unnecessary headaches in the future!

Our first survey item will be a multiple choice question using radio buttons. Radio buttons only allow a respondent to choose a single response.

If you want to allow survey respondents to select multiple responses to a question, use the Checkboxes type, but be sure to test this out thoroughly as exported checkbox data can be tricky (hard to distinguish between boxes that were purposefully left unchecked and missing data (i.e. someone didn't answer multiple questions, including the checkbox question)).

The screenshot shows the REDCap 'Add / Edit Records' interface. On the left is a sidebar with navigation links: 'Add / Edit Records', 'Applications' (Calendar, Data Exports, Reports, Data Import Tool, Data Comparison Tool, Logging, Field Comment Log, File Repository, User Rights and Roles, Data Quality, REDCap Mobile App), and 'Help & Information' (Help & FAQ, Video Tutorials, Suggest a New Feature, Contact REDCap administrator). The main content area has a heading 'You may add a new project field to this data collection instrument by completing the fields below and clicking the Save button at the bottom. When you add a new field, it will be added to the form on this page. For an overview of the different field types available, you may view the [Field Types video \(4 min\)](#).' Below this is a 'Field Type' dropdown menu. The dropdown is open, showing a list of field types: '---- Select a Type of Field ----', 'Text Box (Short Text, Number, Date/Time, ...)', 'Notes Box (Paragraph Text)', 'Calculated Field', 'Multiple Choice - Drop-down List (Single Answer)', 'Multiple Choice - Radio Buttons (Single Answer)' (highlighted in blue), 'Checkboxes (Multiple Answers)', 'Yes - No', 'True - False', 'Signature (draw signature with mouse or finger)', 'File Upload (for users to upload files)', 'Slider / Visual Analog Scale', 'Descriptive Text (with optional Image/Video/Audio/File Attachment)', and 'Begin New Section (with optional text)'. Two red arrows point to the dropdown arrow and the selected 'Multiple Choice - Radio Buttons (Single Answer)' option. At the bottom of the main content area are 'Add Field' and 'Add Matrix of Fields' buttons. On the right side of the interface, there is a 'VIDEO: How to use this page' link and a section titled 'Alternatively, you may' with text about making changes to the data dictionary file and adding new fields or editing existing fields.

Example Survey for Training

https://unmc...

Logged in as kksamson

My Projects

Project Home or ...

REDCap Messenger

Project status: Development

Example Survey for Training

Data Collection

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View data collection statu...

Add / Edit Records

Create new records or ed...

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Contact REDCap adm...

**Add New Field**

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

**Field Type:** Multiple Choice - Radio Buttons (Single Answer)

**Field Label** [How to use Piping](#)

What is your favorite National Park?

**Choices (one choice per line)** [Copy existing choices](#)

[How do I manually code the choices?](#)

**Action Tags / Field Annotation (optional)**

[Learn about Action Tags](#) or [using Field Annotation](#)

**Variable Name** (utilized during data export)

ONLY letters, numbers, and underscores

☐ Enable auto naming of variable based upon its Field Label?

**Required?\*** ☒ No ☐ Yes

\* Prompt if field is blank

**Identifier?** ☒ No ☐ Yes

Does the field contain identifying information (e.g., name, SSN, address)?

**Custom Alignment** Right / Vertical (RV)

Align the position of the field on the page

**Field Note (optional)**

Small reminder text displayed underneath field

**Save** **Cancel**

Type in your survey question or prompt in the Field Label box (make up any question that has more than two answers).



Type in your answer choices in the Choices box, limiting only one choice to each line.

**Add New Field**

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

**Field Type:** Multiple Choice - Radio Buttons (Single Answer)

**Field Label** [How to use Piping](#)  
What is your favorite National Park?

**Choices (one choice per line)** [Copy existing choices](#)  
Glacier  
Yellowstone  
Tetons  
Yosemite

[Manually code the choices?](#)

**Action Tags / Field Annotation** (optional)  
[Learn about Action Tags](#) or [using Field Annotation](#)

**Variable Name** (utilized during data export)  
ONLY letters, numbers, and underscores  
☐ Enable auto naming of variable based upon its Field Label?

**Required?\*** ☒ No ☐ Yes  
\* Prompt if field is blank

**Identifier?** ☒ No ☐ Yes  
Does the field contain identifying information (e.g., name, SSN, address)?

**Custom Alignment** Right / Vertical (RV)  
Align the position of the field on the page

**Field Note** (optional)  
Small reminder text displayed underneath field

**Save** **Cancel**

Once you click out of the choices box, REDCap will automatically assign numbers to each choice. You will be given choices to export the data as numbers-only (raw data) or the values you typed in (labels).

The screenshot shows the REDCap 'Add New Field' dialog box. A modal message box is open in the center, stating: 'Raw values for choices were added automatically'. The message explains that raw values were automatically assigned to choices that only had labels. It lists the following assignments:

- 1 was set as the raw value for **Glacier**
- 2 was set as the raw value for **Yellowstone**
- 3 was set as the raw value for **Tetons**
- 4 was set as the raw value for **Yosemite**

The modal message box has a 'Close' button, which is highlighted by a red arrow. The background dialog box shows the 'Field Type' set to 'Multiple Choice', the 'Field Label' as 'What is your favorite national park?', and the 'Choices' list containing '1, Glacier', '2, Yellowstone', '3, Tetons', and '4, Yosemite'. The 'Save' and 'Cancel' buttons are at the bottom of the dialog box.



Give this item a variable name, using only letters, numbers, and underscores. This is the variable name that will be in your exported dataset, which will be a column of data containing survey respondent's data (one row for each respondent) related to this question.

When finished, click "Save".

Example Survey for Training

Logged in as kks

My Projects

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Suggest a New Featu

Contact REDCap adm

Field Type: Multiple Choice - Radio Buttons (Single Answer)

Field Label: What is your favorite National Park?

Variable Name: favorite\_park

ONLY letters, numbers, and underscores.

Required?\* ☒ No ☐ Yes

\* Prompt if field is blank.

Identifier? ☒ No ☐ Yes

Does the field contain identifying information (e.g., name, SSN, address)?

Custom Alignment: Right / Vertical (RV)

Align the position of the field on the page

Field Note (optional)

Small reminder text displayed underneath field

Action Tags / Field Annotation (optional)

Learn about Action Tags or using Field Annotation

Save Cancel

The REDCap Consortium | Citing REDCap | UNMC | UNMC McClellan Library

University of Nebraska Medical Center

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Example Survey for Training

https://unmcrcdcap

Logged in as **kksamson** | Log out

My Projects

Project Home or Project

REDCap Messenger

Project status: **Development**

Data Collection [Edit instrument](#)

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- Contact REDCap administrator

Create snapshot of instruments

VIDEO: How to use this page

Last snapshot: never

This module will allow you to create new data collection instruments/surveys or edit existing ones. Changes may be made by either using the **Online Designer** or **Upload Data Dictionary** (see tabs above), in which you may use either method or both. The Online Designer may help you get some initial fields/forms built quickly or to make quick edits, but using the Data Dictionary file may be more helpful if you will be adding a large number of fields for this project.

This page allows you to build and customize your data collection instruments one field at a time. You may add new fields or edit existing ones. New fields may be added by clicking the **Add Field** buttons. You can begin editing an existing field by clicking on the **Edit** icon. If you decide that you do not want to keep a field, you can simply delete it by clicking on the **Delete** icon. To reorder the fields, simply **drag and drop** a field to a different position within the form below. NOTE: While in development status, all field changes will take effect immediately in real time.

[Return to list of instruments](#)

Current instrument: **Example Survey** [Preview instrument](#)

Variable: record\_id

**Record ID**

NOTE: The field above is the record ID field and thus cannot be deleted or moved. It can only be edited.

[Add Field](#) [Add Matrix of Fields](#)

Variable: favorite\_park

**What is your favorite National Park?**

- ☐ Glacier
- ☐ Yellowstone
- ☐ Tetons
- ☐ Yosemite

reset

You new survey item has been added to your survey. You can always go back and modify the questions, answer choices, layout, etc., by clicking on the pencil in that survey item's box.

Let's try it once. Say we don't like how the answer choices are far off to the right, and we want them to be directly below the question. Click the pencil to start editing.



As you can see, it takes us back to the same screen we were on. You can modify the question/prompt, answer choices, variables names, etc. We will modify the alignment of the answers on the survey by choosing "Left/Vertical (LV)" in the drop down menu for Custom Alignment. Then click save.

Example Survey for Training

https://unmcredcap.org

Logged in as kksamson | Log out

My Projects

Project Home or Project

REDCap Messenger

Project status: Development

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Suggest a New Feature

Contact REDCap administrator

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

Field Type: Multiple Choice - Radio Buttons (Single Answer)

Field Label: What is your favorite National Park?

Variable Name (utilized during data export): favorite\_park

Required?: ☒ No ☐ Yes

Identifier?: ☒ No ☐ Yes

Custom Alignment: Right / Vertical (RV) ☒ Right / Vertical (RV) ☐ Right / Horizontal (RH) ☐ Left / Vertical (LV) ☐ Left / Horizontal (LH)

Field Note (optional):

Action Tags / Field Annotation (optional):

Save Cancel

What is your favorite National Park?

1, Glacier

2, Yellowstone

3, Tetons

4, Yosemite

Example Survey for Training

https://unmcrcap.unmc.edu/redcap/redcap\_v7.6.1/Design/online\_designer.php?pid=1770&f

Project Home Project Setup Online Designer Data Dictionary

Create snapshot of instruments VIDEO: How to use this page

**Data Collection** Edit instruments

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- View data collection status of all records

Add / Edit Records  
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- Contact REDCap administrator

Return to list of instruments

Current instrument: **Example Survey** Preview instrument

Variable: record\_id

**Record ID**

NOTE: The field above is the record ID field and thus cannot be deleted or moved. It can only be edited.

Add Field Add Matrix of Fields

Variable: favorite\_park

**What is your favorite National Park?**

- ☐ Glacier
- ☐ Yellowstone
- ☐ Tetons
- ☐ Yosemite

reset

Add Field Add Matrix of Fields

Notice that the answers now appear directly below the question. Let's try a different type of survey item by clicking "Add Field". You can choose either "Add Field" button, and then later re-arrange the order of the questions by just dragging-and-dropping on this online designer home page.

Example Survey for Training

https://unmcrcdcap.unmc.edu/redcap/redcap\_v7.6.1/Design/online\_designer.php?pid=1770&f

Data Collection

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Suggest a New Feature

Contact REDCap administrator

This time we'll try a simple yes/no question.

Add New Field

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

Field Type: Multiple Choice - Radio Buttons (Single Answer)

Field Label: --- Select a Type of Field ---

Choices (on):

- Text Box (Short Text, Number, Date/Time, ...)
- Notes Box (Paragraph Text)
- Calculated Field
- Multiple Choice - Drop-down List (Single Answer)
- Multiple Choice - Radio Buttons (Single Answer)
- Checkboxes (Multiple Answers)
- Yes - No
- True - False
- Signature (draw signature with mouse or finger)
- File Upload (for users to upload files)
- Slider / Visual Analog Scale
- Descriptive Text (with optional Image/Video/Audio/File Attachment)
- Begin New Section (with optional text)

Action Tag: @

Save Cancel



Type in your question in the Field Label box, your variable name in the Variable Name box, and click “Save”.

Notice that you cannot change the choices when you select the “Yes – No” Field Type. If you would like to change the choices (e.g. add “Maybe”), then you would need to make use a Multiple-Choice type of question.

The screenshot shows the 'Add New Field' dialog box in REDCap. The 'Field Type' is set to 'Yes - No'. The 'Field Label' is 'In the last year, have you received a flu shot?'. The 'Variable Name' is 'flu\_shot'. The 'Required?' checkbox is checked. The 'Identifier?' radio button is set to 'No'. The 'Custom Alignment' is 'Left / Vertical (LV)'. The 'Field Note' is empty. The 'Action Tags / Field Annotation' section is empty. The 'Save' button is highlighted with a red arrow. The 'Field Label' and 'Variable Name' fields are also highlighted with red arrows.

**Add New Field**

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

**Field Type:** Yes - No

**Field Label** [How to use Piping](#)  
In the last year, have you received a flu shot?

**Variable Name** (utilized during data export)  
flu\_shot ☐ Enable auto naming of variable based upon its Field Label?  
ONLY letters, numbers, and underscores

**Required?** ☒ \* Prompt if field is blank

**Identifier?** ☒ No ☐ Yes  
Does the field contain identifying information (e.g., name, SSN, address)?

**Custom Alignment** Left / Vertical (LV)  
Align the position of the field on the page

**Field Note** (optional)  
Small reminder text displayed underneath field

**Choices (not modifiable)**  
1, Yes  
0, No

**Action Tags / Field Annotation** (optional)  
[Learn about Action Tags](#) or [using Field Annotation](#)

**Save** **Cancel**

We'll add another field to our survey, at the top of the survey. This will be a mandatory question that a survey respondent must answer to submit their survey. Since we have not designated the prior two questions as 'required', a survey respondent could submit their survey without answering those questions.

The screenshot shows the REDCap instrument editor interface. On the left is a sidebar with navigation links: Applications (Calendar, Data Exports, Reports, Data Import Tool, Data Comparison Tool, Logging, Field Comment Log, File Repository, User Rights and DAGs, Data Quality, REDCap Mobile App) and Help & Information (Help & FAQ, Video Tutorials, Suggest a New Feature, Contact REDCap administrator). The main content area is titled 'Example Survey for Training' and shows the 'Current instrument: Example Survey'. A 'Return to list of instruments' button is at the top left, and a 'Preview instrument' button is at the top right. The survey form contains three fields: 1. 'Record ID' (variable: record\_id) with a text input field and a note: 'NOTE: The field above is the record ID field and thus cannot be deleted or edited. It can only be edited.' 2. 'What is your favorite National Park?' (variable: favorite\_park) with radio button options: Glacier, Yellowstone, Tetons, Yosemite, and a 'reset' button. 3. 'In the last year, have you received a flu shot?' (variable: flu\_shot) with radio button options: Yes, No, and a 'reset' button. A red arrow points to the 'Add Field' button between the first and second questions. At the bottom of each question section are 'Add Field' and 'Add Matrix of Fields' buttons.

# TUTORIAL NOTE:

To get the most out of this tutorial, use the same questions and variable names that are used in the following slides. Some of the concepts we will be covering are dependent on specific questions and variables names, so it will be easier to just follow the examples directly. After you finish the tutorial, you can create as many questions as you would like!

### Add New Field

You may add a new p  
button at the bottom  
different field types a

This question will be a multiple-choice drop-down list.  
Complete the Field Label, Choices, Variable Name and then  
click "Yes" where it asks if this should be a required field.

When everything is entered, click 'Save'.

**Field Type:** Multiple Choice - Drop-down List (Single Ansv

#### Field Label

How did you hear about this survey?

**Variable Name** (u...ing data export)

hear

☐ Enable auto naming of  
variable based upon its  
Field Label?

**Required?\*** ☐ No ☒ Yes

\* Prompt if field is blank

**Identifier?** ☒ No ☐ Yes

Does the field contain identifying information (e.g. name, SSN, address)?

**Custom Alignment** Right / Vertical (RV)

Align the position of the field on the page

**Field Note** (optional)

Small reminder text displayed underneath field

**Choices (one choice per line)** [Copy existing choices](#)

- 1, Email
- 2, Internet
- 3, Coworker
- 4, Friend

☐ Enable auto-comp... for this drop-down ?

[How do I manually code the choices?](#)

**Action Tags / Field Annotation** (optional)

@ [Learn about Action Tags](#) or [using Field Annotation](#)

Save

Cancel

Variable: record\_id

**Record ID**

NOTE: The field above is the record ID field and thus cannot be deleted or moved. It can only be edited.

Add Field Add Matrix of Fields

Variable: hear

**How did you hear about this survey?**

\* must provide value

Add Field Add Matrix of Fields

Variable: favorite\_park

**What is your favorite National Park?**

☐ Glacier

☐ Yellowstone

☐ Tetons

☐ Yosemite

reset

Add Field Add Matrix of Fields

Variable: flu\_shot

**In the last year, have you received a flu shot?**

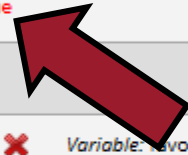
☐ Yes

☐ No


reset

Add Field Add Matrix of Fields

Notice that with the newest question, there is a warning in red underneath it that indicates the survey respondent must provide a value.









 Variable: record\_id

**Record ID**

NOTE: The field above




[Add Field](#) [Add Matrix of Fields](#)

    Variable: hear

**How did you hear about this survey?**

\* must provide value

[Add Field](#) [Add Matrix of Fields](#)

    Variable: favorite\_park

**What is your favorite National Park?**

☐ Glacier





☐ Yellowstone

☐ Tetons

☐ Yosemite

[reset](#)

[Add Field](#) [Add Matrix of Fields](#)

    Variable: flu\_shot

**In the last year, have you received a flu shot?**

☐ Yes

☐ No

[reset](#)

[Add Field](#) [Add Matrix of Fields](#)

Let's add another field under the newest question.



This time we'll make the field type "Text Box", which allows a person to type in their answer. Notice there are no choices you have to specify with this answer type. After entering the field label and variable name, click 'Save'.

**Add New Field**

You may add a new field to your survey. After clicking the Save button at the bottom of the form, you will be taken to the Survey of the different field types available, you may view the [Field Types video \(4 min\)](#).

**Field Type:** Text Box (Short Text, Number, Date/Time, ...) ▼

**Field Label** [How to](#)  
Please provide the name of the person who told you about this survey:

**Action Tags / Field Annotation** (optional)  
[Learn about Action Tags](#) or [using Field Annotation](#)

**Variable Name** (utilized during data export)  
name ☐ Enable auto naming of variable based upon its Field Label?  
ONLY letters and underscores

**Validation?** (optional) None ---- ▼  
- or -

**Enable searching within a biomedical ontology** ?  
-- choose ontology to search -- ▼

**Required?\*** ☒ No ☐ Yes  
\* Prompt if field is blank


**Identifier?** ☒ No ☐ Yes  
Does the field contain identifying information (e.g., name, SSN, address)?

**Custom Alignment** Right / Vertical (RV) ▼  
Align the position of the field on the page

**Field Note** (optional)  
Small reminder text displayed underneath field


**Save** **Cancel**






## Current instrument: **Example Survey**

 Variable: record\_id

**Record ID**

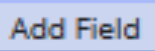
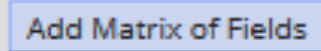
NOTE: The field above is the record ID field and thus cannot be edited.








     Variable: hear

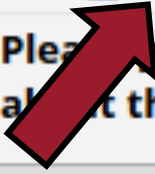

**How did you hear about this survey?**

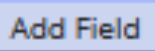
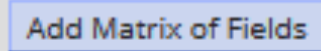
\* must provide value

     Variable: name

**Please provide the name of the person who told you about this survey.**

  Branching Logic

Now let's say that we only want people to answer the question we just created, only if they responded a certain way to a preceding question. To do this, we will use "Branching Logic" or "Skip Logic", which will only make a question appear if the survey respondent answered a specific way in an earlier question.

Click the branching logic symbol (green arrows) on the question you want to be contingent on a previous response.



## Add/Edit Branching Logic

Branching Logic may be employed when fields/questions need to be hidden under certain conditions. If branching logic is defined, the field will only be visible if the conditions provided are true (i.e. show the field only if...). You may specify those conditions in the text box below for the Advanced Branching Logic Syntax or by choosing the Drag-N-Drop Logic Builder method, which allows you to build your logic in a much easier fashion by simply dragging over the options you want. You may switch back and forth between each method if you wish, but please be aware that since the advanced logic allows for greater complexity, it may not be able to be switched over to the Drag-N-Drop method if it becomes too complex.

Choose method below for the following field: **name** - Please provide the name of the person

☐ **Advanced Branching Logic Syntax** [\(How do I use the advanced syntax?\)](#)

Show the field ONLY if...

Test logic with a record: -- select record --

— OR —

☒ **Drag-N-Drop Logic Builder**

**Field choices from other fields**  
(drag a choice below to box on right)

record\_id = (define criteria)  
hear = Email (1)  
hear = Internet (2)  
hear = Coworker (3)  
hear = Friend (4)  
favorite\_park = Glacier (1)  
favorite\_park = Yellowstone (2)  
favorite\_park = Tetons (3)

→  
Drag  
and  
Drop  
→

Show the field ONLY if...

☒ ALL below are true  
☐ ANY below are true

[Clear logic](#)

Save

Cancel

It is the most straight-forward to use the Drag-N-Drop Logic Builder. In the “Field choices from other fields” panel, you will find all possible answer choices from your survey. The word to the left of the equal sign is the variable name associated with a question, and the word to the right of the equal sign indicates a specific answer to that question.

You simply drag responses from the left panel into the right panel to select them, which we will do on the next slide.

## Add/Edit Branching Logic

Branching Logic may be employed when fields/questions need to be hidden under certain conditions. If branching logic is visible if the conditions provided are true (i.e. show the field only if...). You may specify those conditions in the text box Branching Logic Syntax or by choosing the Drag-N-Drop Logic Builder method, which allows you to build your logic in a more visual way by dragging over the options you want. You may switch back and forth between each method if you wish, but please be aware that if branching logic allows for greater complexity, it may not be able to be switched over to the Drag-N-Drop method if it becomes too complex.

Choose method below for the following field: **name** - Please provide the name of the person you are talking to

☐ **Advanced Branching Logic Syntax**

[\(How do I use the advanced syntax?\)](#)

Show the field ONLY if...

[hear] = '3' and [hear] = '4'

Test logic with a record: -- select record --

— OR —

☒ **Drag-N-Drop Logic Builder**

**Field choices from other fields**  
(drag a choice below to box on right)

record\_id = (define criteria)  
hear = Email (1)  
hear = Internet (2)  
hear = Coworker (3)  
hear = Friend (4)  
favorite\_place = Glacier (1)  
favorite\_place = Yellowstone (2)  
favorite\_place = National Parks (3)

Drag  
and  
Drop

Show the field ONLY if...

☒ ALL below are true

☐ ANY below are true

hear = Coworker (3) **X**

hear = Friend (4) **X**

Here I have dragged over two responses to the question “How did you hear about this survey”: Coworker and Friend.

If you accidentally drag over a response you do not want, you can hit the red “X” next to it.

There is one problem here. Notice above our selection list, it says “Show the field ONLY if...”, and “All below are true” is selected. This is not good, because a respondent can only give one response to the ‘hear’ question, so they would never choose both ‘Coworker’ and ‘Friend’. In this case, no one would ever meet this branching logic criteria and thus no one would ever see this question.

## Add/Edit Branching Logic

Branching Logic may be employed when fields/questions need to be hidden under certain conditions. If branching logic is defined, the field will only be visible if the conditions provided are true (i.e. show the field only if...). You may specify those conditions in the text box below using Branching Logic Syntax or by choosing the Drag-N-Drop Logic Builder method, which allows you to build your logic in a much simpler way by dragging over the options you want. You may switch back and forth between each method if you wish, but please be aware that while the logic allows for greater complexity, it may not be able to be switched over to the Drag-N-Drop method if it becomes too complex.

Choose method below for the following field: **name** - Please provide the name of the field

☐ **Advanced Branching Logic Syntax**

[\(How do I use the advanced syntax?\)](#)

Show the field ONLY if...

[hear] = '3' or [hear] = '4'

Test logic with a record: -- select record --

— OR —

☒ **Drag-N-Drop Logic Builder**

**Field choices from other fields**  
(drag a choice below to box on right)

record\_id = (define criteria)  
hear = Email (1)  
hear = Internet (2)  
hear = Coworker (3)  
hear = Friend (4)  
favorite\_park = Glacier (1)  
favorite\_park = Yellowstone (2)  
favorite\_park = Tetons (3)

Drag  
and  
Drop

Show the field ONLY if...

☐ ALL below are true

☒ ANY below are true

hear = Coworker (3) ✖  
hear = Friend (4) ✖

[Clear logic](#)

Save

Cancel

To remedy this problem, click “ANY below are true”. This means if a respondent selects either Coworker or Friend, they will see this question.

You may notice that the Drag-N-Drop Logic Builder actively writes syntax in the Advanced Branching Logic Syntax above as you build your logic. If you are comfortable working directly with the syntax, you can edit it in the Advanced box.

Click save.



Current instrument: **Example Survey**

Notice that a red note appears next to this question now, indicating that branching logic exists. If you want to modify the branching logic, you simply hit the green arrows branching logic icon.

Variable: record\_id  
**Record ID**

NOTE: The field above is the record ID field and thus cannot be deleted.

Add Field Add Matrix of Fields

Variable: hear  
**How did you hear about this survey?**  
\* must provide value

Add Field Add Matrix of Fields

Variable: name [Branching logic exists]  
**Please provide the name of the person who told you about this survey:**

Add Field Add Matrix of Fields

Variable: favorite\_park  
**What is your favorite National Park?**  
☐ Glacier  
☐ Yellowstone  
☐ Tetons  
☐ Yosemite  
reset


Add Field Add Matrix of Fields

Variable: flu\_shot  
**In the last year, have you received a flu shot?**  
☐ Yes  
☐ No  
reset

Add Field Add Matrix of Fields

Current instrument: **Example Survey**





Preview instrument

 Variable: record\_id

**Record ID**

NOTE: The field above is the record ID field and thus cannot be deleted or moved. It can only be edited.





[Add Field](#) [Add Matrix of Fields](#)

    Variable: hear

**How did you hear about this survey?**





\* must provide value

[Add Field](#) [Add Matrix of Fields](#)

    Variable: name [Branching logic exists]

**Please provide the name of the person who told you about this survey:**

[Add Field](#) [Add Matrix of Fields](#)

    Variable: favorite\_park

**What is your favorite National Park?**

☐ Glacier





☐ Yellowstone

☐ Tetons

☐ Yosemite

[reset](#)

[Add Field](#) [Add Matrix of Fields](#)

    Variable: flu\_shot

**In the last year, have you received a flu shot?**

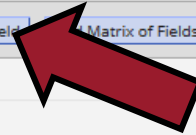
☐ Yes

☐ No

[reset](#)

[Add Field](#) [Add Matrix of Fields](#)

Let's add one more field.



## Add New Field

You may add a new field to your survey. Save button at the bottom. For more information on the different field types available, you may view the [Field Types video \(4 min\)](#).

Choose “Text Box” as the Field Type. Enter your question in the Field Label and the Variable name.

Field Type: Text Box (Short Text, Number, Date/Time, ...) ▾

### Field Label

What date did you hear about this survey from [name]?

### Variable Name

(utilized in logic, calcs, and exports)

ref\_name

☐ Enable auto naming of variable based upon its Field Label?

How to use

[Smart Variables](#)

[Piping](#)

### Validation? (optional)

---- None ---- ▾

- or -

☐ Enable searching within a biomedical ontology ?

ontology to search -- ▾

☒ No ☐ Yes

is blank

☒ No ☐ Yes

obtain identifying information (e.g., name, SSN, address)?

Alignment Left / Vertical (LV) ▾

of the field on the page

(optional)

text displayed underneath field

Save

Cancel

Notice that in my question, I used “[name]”. Recall that ‘name’ was the variable name I chose for the previous question I created. If you put a variable name in square brackets, the value of that variable will appear in its place. For example, if a survey respondent answered “Brittany” to the last question, this question would read “What date did you hear about this survey from Brittany?” Using the value from one question in another question is referred to as Piping. Click the “How to use Piping” if you would like to learn more.



## Add New Field

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

**Field Type:** Text Box (Short Text, Number, Date/Time, ...)

### Field Label

[How to use Piping](#)

What date did you hear about this survey from  
[name]?

### Action Tags / Field Annotation (optional)

### Variable Name (utilized during data export)

ref\_name

☐ Enable auto naming of variable based upon its Field Label?

ONLY letters, numbers, and underscores

### Validation? (optional)

--- None ---

- or -

### Enable searching with

choose ontology to

Required?\* ☒ No ☐

prompt if field is blank

Identifier? ☒ No ☐

the field contain identifier

### Custom Alignment

the position of the field

### Field Note (optional)

reminder text displayed

- None ---
- Date (D-M-Y)
- Date (M-D-Y)**
- Date (Y-M-D)
- Datetime (D-M-Y H:M)
- Datetime (M-D-Y H:M)
- Datetime (Y-M-D H:M)
- Datetime w/ seconds (D-M-Y H:M:S)
- Datetime w/ seconds (M-D-Y H:M:S)
- Datetime w/ seconds (Y-M-D H:M:S)
- Email
- Integer
- Letters only
- Number
- Number (1 decimal place)


Here we will select a type of validation. I chose a date format, since we are asking about a date. When you select this validation type, it will only allow responses which are dates in the specified format. For dates, this is particularly helpful because it will add a small calendar next to the answer box so someone can just select the date on the calendar instead of typing it in.

After selecting your validation type, click "Save".

[Return to list of instruments](#)

Current instrument: **Example Survey**

[Preview instrument](#)

 Variable: record\_id

**Record ID**

NOTE: The field above is the record ID field and thus cannot be deleted or moved. It can only be edited.

[Add Field](#)

[Add Matrix of Fields](#)






     Variable: hear

**How did you hear about this survey?**

\* must provide value

[Add Field](#)

[Add Matrix of Fields](#)

     Variable: name [Branching logic exists]

**Please provide the name of the person who told you about this survey:**

[Add Field](#)

[Add Matrix of Fields](#)

     Variable: ref\_name

**What did you hear about this survey from [name]?**



Today

M-D-Y

In addition to the calendar option, there is a “Today” button which if pressed will enter today’s date.

Since we only want this question to appear if a respondent answered the prior question, let’s add branching logic to this question. Click the green arrows icon.

**What is your favorite National Park?**

Variable: record\_id

**Add/Edit Branching Logic**

Branching Logic may be employed when fields/questions need to be hidden under certain conditions. If branching logic is defined, the field will only be visible if the conditions provided are true (i.e. show the field only if...). You may specify those conditions in the text box below for the Branching Logic Syntax or by choosing the Drag-N-Drop Logic Builder method, which allows you to build your logic in a much easier fashion by dragging over the options you want. You may switch back and forth between each method if you wish, but please be aware that since the Branching Logic Syntax method allows for greater complexity, it may not be able to be switched over to the Drag-N-Drop method if it becomes too complex.

Choose method below for the following field: **ref\_name** - What date did you hear about this?☐ **Advanced Branching Logic Syntax**[\(How do I use the advanced syntax?\)](#)

Show the field ONLY if...

[name] &lt;&gt; "

Test logic with a record: -- select record --

— OR —

☒ **Drag-N-Drop Logic Builder**

**Field choices from other fields**  
(drag a choice below to box on right)

record\_id = (define criteria)  
hear = Email (1)  
hear = Internet (2)  
hear = Coworker (3)  
hear = Friend (4)  
name = (define criteria)  
favorite park = Glacier (1)  
favorite park = Yellowstone (2)

Show the field ONLY if...

☒ ALL below are true☐ ANY below are true

name &lt;&gt; [ ]

→  
Drag  
and  
Drop  
→

Save

The branching logic on this one is a bit different than the last one, since the question we are basing this logic off of is open text. Here, we only want this question to appear if the prior question 'name' is not empty. Drag the 'name = (define criteria)' over to the right panel. The 'not equal to' symbol in this syntax is '<>'. We'll leave the value after '<>' blank, since we only want this question to appear if the value given to the name question is not equal to missing. In other words, this question will only appear if the respondent entered something in response to the 'name' question.

If you only wanted this question to appear when a specific value was given to the name question, you would type in that value box next to the '<>' symbol.



https://unmcrcap.unmc.edu/redcap/redcap\_v7.6.3/Design/online\_designer.php?pid=1770&page=example\_survey

Current instrument: **Example Survey** Preview instrument

**Variable: record\_id**

**Record ID**

NOTE: The field above is the record ID field and thus cannot be deleted or moved. It can only be edited.

Add Field Add Matrix of Fields

**Variable: hear**

**How did you hear about this survey?**

\* must provide value

Add Field Add Matrix of Fields

**Variable: name** [Branching logic exists]

**Please provide the name of the person who told you about this survey:**

Add Field Add Matrix of Fields

**Variable: ref\_name** [Branching logic exists]

**What date did you hear about this survey from [name]?**

Add Field Add Matrix of Fields

**Variable: favorite\_park**

**What is your favorite National Park?**

☐ Glacier

☐ Yellowstone

☐ Tetons

☐ Yosemite

reset

Add Field Add Matrix of Fields

**Variable: flu\_shot**

**In the last year, have you received a flu shot?**

☐ Yes

☐ No

reset

Add Field Add Matrix of Fields

That's it for the survey design!  
Next we'll explore how to  
'pilot' your survey to see if it  
works as you expect.

7-Day Forecast for Latitude - X Example Survey for Training X +

https://unmcrcdcap.unmc.edu/redcap/redcap\_v7.6.3/Design/online\_designer.php?pid=1770&page=example\_survey

**REDCap™**

Logged in as **kksamson** | Log out

**My Projects**

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**

Calendar

Data Exports, Reports, and Stats

Data Import Tool

Data Comparison Tool

Logging

Field Comment Log

File Repository

User Rights and DAGs

Data Quality

REDCap Mobile App

**Help & Information**

Help & FAQ

Video Tutorials

Suggest a New Feature

Contact REDCap administrator

**University of Nebraska Medical Center**

University of Nebraska Medical Center

**Example Survey for Training**

Project Home Project Setup Online Designer Data Dictionary

Create snapshot of instruments

VIDEO: How to use this page

Last snapshot: never

This page allows you to build and customize your data collection instruments one field at a time. You may add new fields or edit existing ones. New fields may be added by clicking the **Add Field** buttons. You can begin editing an existing field by clicking on the **Edit** icon. If you decide that you do not want to keep a field, you can simply delete it by clicking on the **Delete** icon. To reorder the fields, simply **drag and drop** a field to a different position within the form below. NOTE: While in development status, all field changes will take effect immediately in real time. Are you using Action Tags yet? If not, learn about Action Tags here.

Return to list

**Click the Project Setup Tab**

Current instrument: **Example Survey** Preview instrument

Variable: record\_id

**Record ID**

NOTE: The field above is the record ID field and thus cannot be deleted or moved. It can only be edited.

Add Field Add Matrix of Fields

Variable: hear

**How did you hear about this survey?**

\* must provide value

Add Field Add Matrix of Fields

Variable: name [Branching logic exists]

**Please provide the name of the person who told you about this survey:**

Add Field Add Matrix of Fields

Variable: ref\_name [Branching logic exists]

7-Day Forecast for Latitude 40°N Example Survey for Training

https://unmcrcap.unmc.edu/redcap/redcap\_v7.6.3/ProjectSetup/index.php?pid=1770

**REDCap™**

Logged in as **kksamson** | Log out

**My Projects**

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**

- Calendar
- Data Exports, Reports, and Stats
- Data Import Tool
- Data Comparison Tool
- Logging
- Field Comment Log
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**Example Survey for Training**

Project Home Project Setup Other Functionality Project Revision History

Project status: **Development** Completed steps **0 of 7**

**Main project settings**

Not started

**Enable** Use surveys in this project? VIDEO: How to create and manage a survey

**Enable** Use longitudinal data collection with defined events?

Project title, purpose, etc.

**Design data collection instruments**

Not started

Add or edit records on your data collection instruments. This may be done by either using the Online Designer (online method) or by uploading a Data Dictionary (offline method). Quick link to the Online Designer (online method) or by uploading a Data Dictionary (offline method). Quick link to the Online Designer (online method) or by uploading a Data Dictionary (offline method).

**Click "Enable" next to the words "Use surveys in this project"**

**Enable optional modules and customizations**

Optional

**Enable** Repeatable instruments?

**Disable** Auto-numbering for records?

**Enable** Scheduling module (longitudinal only)?

**Enable** Randomization module?

**Enable** Designate an email field to use for invitations to survey participants?

Additional customizations

**Set up project bookmarks (optional)**

Optional

You may create custom bookmarks to webpages that exist inside or outside of REDCap. These bookmarks will be seen as links on the left-hand project menu and can be accessed at any time



7-Day Forecast for Latitude - X Example Survey for Training X +

https://unmcrcap.unmc.edu/redcap/redcap\_v7.6.3/ProjectSetup/index.php?pid=1770

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**My Projects**

Project Home or Project Setup

REDCap Messenger

Project status: **Development**

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

**Manage Survey Participants**

Get a public survey link or build a list for inviting respondents

**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

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**Example Survey for Training**

Project Home Project Setup Other Functionality Project Revision History

Project status: **Development** Completed steps **0 of 7**

**Main project settings**

Not started

Disable ☒ Use surveys in this project? [?](#) [VIDEO: How to create and manage a survey](#)

Enable ☐ Use longitudinal data collection with defined events? [?](#)

**After enabling surveys on your project, a new item appears in the menu bar to the left. Click "Manage Survey Participants"**

**Enable optional modules and customizations**

Optional

☐ Repeatable instruments [?](#)

☒ Auto-numbering for records [?](#)

☐ Scheduling module (longitudinal only) [?](#)

☐ Randomization module [?](#)

☐ Designate an email field to use for invitations to survey participants [?](#)

Additional customizations



7-Day Forecast for Latitude x Example Survey for Training x

https://unmcrcdcap.unmc.edu/redcap/redcap\_v7.6.3/Design/online\_designer.php?pid=1770&dialog=enable\_surveys

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Example Survey for Training

Project Home Project Setup Online Designer Data Dictionary

Create snapshot of instruments

VIDEO: How to use this page

Last snapshot: never

The Online Designer will allow you to make project modifications to fields and data collection instruments very easily using only your web browser. NOTE: While in development status, all field changes will take effect immediately in real time.

Data Collection Instruments

Instrument name
Example Survey

Enable my survey(s)

**NOTICE:** You cannot utilize the 'Manage Survey Participants' page until you have first enabled one or more surveys. You may enable surveys here on the Online Designer by clicking the Enable button for any given data collection instrument. Once you have enabled an instrument as a survey, you may collect data for it by distributing surveys by utilizing the 'Manage Survey Participants' page on the left-hand menu.

Close

You may get a notice box that pops up telling you to enable a survey. We will do this next. Click "Close".

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

**My Projects**

[Project Home](#) or [Project Setup](#)

[REDCap Messenger](#)

Project status: **Development**

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

**Manage Survey Participants**  
- Get a public survey link or build a participant list for inviting respondents

**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 ▾

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## Example Survey for Training

[Project Home](#) [Project Setup](#) [Online Designer](#) [Data Dictionary](#)

[Create snapshot of instruments](#) [VIDEO: How to use this page](#)

Last snapshot: never ?

The Online Designer will allow you to make project modifications to fields and data collection instruments very easily using only your web browser. NOTE: While in development status, all field changes will take effect immediately in real time.

**Data Collection Instruments**

**Survey options:**

- [Survey Queue](#)
- [Survey Login](#)
- [Survey Notifications](#)

**Add new instrument:**

- [Create](#) a new instrument from scratch
- [Import](#) a new instrument from the official [REDCap Shared Library](#)
- [Upload](#) instrument ZIP file from another project/user or [external libraries](#)

Instrument name	Fields	View PDF	Enabled a survey	Instrument actions	Survey-related options
Example Survey	6		<a href="#">Enable</a>	<a href="#">Choose action ▾</a>	

Previously we enabled surveys generally for our project. Here, we must specify which survey we are enabling. Click “Enable”.



7-Day Forecast for Latitude × Example Survey for Training ×

https://unmcredcap.unmc.edu/redcap/redcap\_v7.6.3/Surveys/create\_survey.php?pid=1770&view=showform&page=example\_ Search ☆

Logged in as **kksamson** | Log out

**My Projects**

Project Home or Project Setup

REDCap Messenger

Project status: **Development**

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

**Manage Survey Participants**  
- Get a public survey link or build a participant list for inviting respondents

**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 ▼

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**Example Survey for Training**

Project Home Project Setup Online

You may utilize any data collection instrument as a survey form. You can create a survey form via the instrument via normal data entry on the form, but you can also create a survey form by respondents.

Set up my survey for data collection instrument "Example Survey" Cancel

**Basic Survey Options:**

**Survey Title**  
Example Survey  
Title to be displayed to participants at the top of the survey page

**Survey Instructions**  
(Displayed at top of survey after title)

Please complete the survey below.  
Thank you!

[How to use Piping here](#)

**Survey Design Options:**

**Logo**  
(Optional: display an image above the survey title)

Add new logo:  
[Browse...](#) No file selected.  
(Images wider than 600 pixels will be downsized to fit page.)  
☐ If using a logo, hide survey title on survey page?

**Use enhanced radio buttons and**  
Standard radios and checkboxes [Show example](#)

On this page, you will see many different options you can modify for your survey. We will use all of the defaults for this tutorial, but feel free to read through them, modify some, and see how they affect your survey. For now, scroll to the bottom of this screen and click "Save Changes".

7-Day Forecast for Latitude 40.81 N Example Survey for Training

https://unmc.unc.edu/redcap/redcap\_v7.6.3/Design/online\_designer.php?pid=1770

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**Example Survey for Training**

Project Home Project Setup Online Designer Data Dictionary

The Online Designer will allow you to make project modifications to the web browser. NOTE: While in development status, all field changes will be saved.

**Data Collection Instruments**

**Survey options:**

- Survey Queue
- Survey Login
- Survey Notifications

**Add new instrument:**

- Create a new instrument from scratch
- Import a new instrument from the official REDCap Instrument Library
- Upload instrument ZIP file from another project or external libraries

Instrument name	Fields	View PDF	Enabled a survey	Instrument actions	Survey options
Example Survey	6			Choose action	Survey settings + Automated Invitations

If you want to return to the previous screen with the options for your survey, just click the "Survey Settings" button.

To get a link to our survey to send out to people (or use yourself) to test the survey out, click "Manage Survey Participants".



Logged in as **kksamson** | Log out

My Projects

Project Home or Project Setup

REDCap Messenger

Project status: **Development**

Data Collection

Manage Survey Participants

- Get a public survey link or build a participant list for inviting respondents

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## Example Survey for Training

### Manage Survey Participants

Public Survey Link

Participant List

Survey Instruments

Using a public survey link is the simplest and fastest way to collect responses. Click the public survey link below to email it to your participants. Responses will be collected in the survey instrument. **NOTE:** Since this method uses a single survey link for all participants, it allows for the possibility of participants taking the survey multiple times, which may be necessary in some cases.

To obtain the survey link, copy the URL below and paste it into the body of an email message in your own email client. Your email recipient(s) can then click the link to begin taking your survey.

**Public Survey URL:**

#### Link Actions

Open public survey

Send me URL via email

Survey Access Code or QR Code

#### Link Customizations

Get Short Survey Link

Create Custom Survey Link

Get Embed Code

Click this clipboard button to copy your survey's URL. Paste it into a new internet tab or browser to see what your survey looks like!

**IMPORTANT:** What we are doing right now is using the URL to **TEST** the survey to make sure it works as expected. If you want to use the survey to collect actual data, your project must be moved into production!

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## Example Survey

Please complete the survey below.

Thank you!

How did you hear about this survey?  
\* must provide value

What is your favorite National Park?

☐ Glacier  
☐ Yellowstone  
☐ Tetons  
☐ Yosemite

In the last year, have you received a flu shot?

☐ Yes  
☐ No

Submit

REDCap 7.6.3 - © 2017 Vanderbilt University

Resize font:  
+ | -

This is what our survey looks like. Notice that only three questions appear. That is because the other two questions will only appear if questions are answered a specific way.

I know that answering the first question with either "Coworker" or "Friend" should make a new question appear, so I will answer "Coworker".

## Example Survey

Resize font:



Please complete the survey below.

Thank you!

**How did you hear about this survey?**  \* must provide value

**Please provide the name of the person who told you about this survey:**

**What date did you hear about this survey from \_\_\_\_?**  Today M-D-Y

**What is your favorite National Park?**

☐ Glacier

☐ Yellowstone

☐ Tetons

☐ Yosemite

**In the last year, have you received a flu shot?**

☐ Yes

☐ No

**Submit**

It looks like our branching logic worked because a new question appeared!

Once you type anything into the second question/prompt, the third question appears. Notice that the third question has \_\_\_\_\_ instead of "Josie". The name "Josie" will appear where the line is as soon as you click the box to answer the date question (or the calendar).

**Example Survey** Resize font: + | -

Please complete the survey below.

Thank you!

How did you hear about this survey?  \* must provide value

Please provide the name of the person who told you about this survey:

What date did you hear about this survey from Josie?   M-D-Y

What is your favorite national park?

☐ Glacier  
☐ Yellowstone  
☐ Tetons  
☐ Yosemite

In the last year, have you received a flu shot?

☐ Yes  
☐ No

Alert

The value you provided could not be validated because it does not follow the expected format. Please try again.

Required format: Date (M-D-Y)

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If you try to type anything into the third question response box that is not in M-D-Y format, you will receive this alert. This happened because we put validation constraints on this question to ensure that this question is answered in a specific format.



## Example Survey

Resize font:  
+ | -

Please complete the survey below.

Thank you!

**How did you hear about this survey?**  \* must provide value

**Please provide the name of the person who told you about this survey:**

**What date did you hear about this survey from Josie?**  Today M-D-Y

**What is your favorite National Park?**

☒ Glacier  
☐ Yellowstone  
☐ Tetons  
☐ Yosemite

**In the last year, have you received a flu shot?**


☒ Yes  
☐ No

[reset](#)

**Submit**

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Finish completing the survey and then click submit. Complete the survey a few times (by repasting the survey URL) with different responses, so you have at least a handful of responses. This will give you something more substantive to look at when we do the data export.



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Project status: **Development**

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Example Survey for Training

Manage Survey Participants


Public Survey Link

Participant List

Survey Invitation Log

Using a public survey link is the simplest and fastest way to collect responses for your survey. You may obtain the survey link below to email it to your participants. Responses will be collected anonymously (unless the survey contains questions asking for identifying data from the participant). **NOTE:** Since this method uses a single survey link for all participants, it allows for the possibility of participants taking the survey multiple times, which may be necessary in some cases.


To obtain the survey link, copy the URL below and paste it into the body of an email message in your own email client. Your email recipient(s) can then click the link to begin taking your survey.

Public Survey URL:  

Link Actions

Link Customizations

Return to your REDCap page and click “Data Exports, Reports, and Stats”.



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My Projects

Project Home or Project Setup

REDCap Messenger

Project status: **Development**

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

**Manage Survey Participants**

- Get a public survey link or build a participant list for inviting respondents

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University of Nebraska Medical Center

## Example Survey for Training

### Data Exports, Reports, and Stats

[VIDEO: How to use Data Exports, Reports, and Stats](#)

[+ Create New Report](#)
[My Reports & Exports](#)
[Other Export Options](#)

This module allows you to easily view reports of your data, inspect plots and descriptive statistics of your data, as well as export your data to Microsoft Excel, SAS, Stata, R, or SPSS for analysis (if you have such privileges). If you wish to export your *\*entire\** data set or view it as a report, then Report A is the best and quickest way. However, if you want to view or export data from only specific instruments (or events) on the fly, then Report B is the best choice. You may also create your own custom reports below (if you have such privileges) in which you can filter the report to specific fields, records, or events using a vast array of filtering tools to make sure you get the exact data you want. Once you have created a report, you may view it as a webpage, export it out of REDCap in a specified format (Excel, SAS, Stata, SPSS, R), or view the plots and descriptive statistics for that report.

My Reports & Exports		
	Report name	View/Export Options
A	<b>All data</b> (all records and fields)	<a href="#">View Report</a> <a href="#">Export Data</a> <a href="#">Stats &amp; Charts</a>
B	<b>Selected instruments</b> (all records)	<a href="#">Custom selections</a>

[+ Create New Report](#)



Click the “View Report” button to see all of your survey data in a table online.

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**My Projects**

Project Home or Project Setup

REDCap Messenger

Project status: **Development**

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

**Manage Survey Participants**

- Get a public survey link or build a participant list for inviting respondents

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## Example Survey for Training

### Data Exports, Reports, and Stats

[VIDEO: How to use Data Exports, Reports, and Stats](#)

[Create New Report](#) [My Reports & Exports](#) [Other Export Options](#) [View Report: All data \(all records and fields\)](#)

**Number of results returned: 5**  
Total number of records queried: 5

[Stats & Charts](#) [Export Report](#) [Print Page](#)

### All data (all records and fields)

Record ID record_id	Survey Identifier redcap_survey_identifier	Survey Timestamp example_survey_timestamp	How did you hear about this survey? hear	Please provide the name of the person who told you about this survey: name	What date did you hear about this survey from [name]? ref_name	What is your favorite National Park? favorite_park	In the last year, have you received a flu shot? flu_shot	Complete? example_survey_complete
1		08-30-2017 15:22	Coworker (3)	Josie	08-30-2017	Glacier (1)	Yes (1)	Complete (2)
2		08-30-2017 15:24	Email (1)			Yellowstone (2)	No (0)	Complete (2)
3		08-30-2017 15:24	Friend (4)	Kenneth	08-16-2017	Tetons (3)	No (0)	Complete (2)
4		08-30-2017 15:24	Internet (2)			Glacier (1)	Yes (1)	Complete (2)

If you would like to download this data, click the “Export Report” button.

Notice that each column is associated with a survey question, and each row contains data from one survey respondent. Note that the numbers in parentheses correspond to the choice-number, and does not represent a quantity. If you export the data as raw values, only the numbers in parentheses will appear, not words associated with those numbers.



Exporting "All data (all records and fields)"

Select your export settings, which includes the export format (Excel/CSV, SAS, SPSS, R, Stata) and if you wish to export on the data set.

**Choose export format**

- ☐ CSV / Microsoft Excel (raw data)
- ☒ CSV / Microsoft Excel (labels)
- ☐ SPSS Statistical Software
- ☐ SAS Statistical Software
- ☐ R Statistical Software
- ☐ Stata Statistical Software
- ☐ CDISC ODM (XML)

**De-identification options (optional)**

The options below allow you to limit the amount of data that you are exporting out of the project. Check the options you want to export.

**Known Identifiers:**

- ☐ Remove all tagged Identifier fields (tagged in Data Dictionary)
- ☐ Hash the Record ID field (converts record name to an unidentifiable hash)

**Free-form text:**

- ☐ Remove unvalidated Text fields (i.e. Text fields other than the ones in the Data Dictionary)
- ☐ Remove Notes/Essay box fields

**Date and datetime fields:**

- ☐ Remove all date and datetime fields
- OR —
- ☐ Shift all dates by value between 0 and 364 days (shifted amount determined by algorithm for each record)
- ☐ Also shift all survey completion timestamps by value between 0 and 364 days (shifted amount determined by algorithm for each record)

[Deselect all options](#)

**Additional export options**

- ☒ Export survey identifier field and survey timestamp field(s)?

**Export Data** **Cancel**

Here are the options you are given to export the data. The difference in the first two formats is whether your multiple choice question values are displayed as numbers only (raw data) or their actual choice values that you defined (labels).

There are also de-identification options you may select from. This of course is not relevant now since we are just testing our survey with fake data.

Let's select CSV/Microsoft Excel (labels) and click "Export Data".

## Data Exports, Reports, and Stats

VIDEO: How to use Data Exports, Reports, and Stats

✓ **Data export was successful!**

The data export was successful, and your data is now ready to be downloaded. Click the download icon(s) below on the right to download your data file. If exporting to a specific statistical analysis package, you will additionally need to download the syntax file that is provided for that stats package. For more details, follow the instructions in the box below.

### Citation Notice

Please **cite the REDCap project when publishing manuscripts** (citation information and template methods language are [available here](#)).



### CSV / Microsoft Excel (labels)

You may download the survey results in CSV (comma-separated) format, which can be opened in Excel. You have the choice of downloading the data either with the full headers and answer labels or just with the answer codes (i.e. raw data).

*NOTE: If you are using a version of Microsoft Excel prior to Excel 2007, due to limitations the data will only be read to 255 columns when opened.*

Click icon(s) to download:



Send file?

Click this icon to open or save the file

ExampleSurveyForTrai\_DATA\_LABELS\_2017-08-30\_1612 [Read-Or

File Home Insert Page Layout Formulas Data Review View ACROBAT Tell me what you want

Paste Font Alignment Number Conditional Formatting

Calibri 11 A A Wrap Text General

B I U Merge & Center \$ % .00 .00

A1 Record ID


	A	B	C	D	E	F	G	H	I	J	K	L
1	Record ID	Survey Id	Survey Tir	How did y	Please prc	What date	What is yc	In the last	Complete?			
2	1		#####	Coworker	Josie	#####	Glacier	Yes	Complete			
3	2		#####	Email			Yellowsto	No	Complete			
4	3		#####	Friend	Kenneth	#####	Tetons	No	Complete			
5	4		#####	Internet			Glacier	Yes	Complete			
6	5		#####	Coworker	Matt	8/8/2017	Yosemite	Yes	Complete			
7												
8												
9												
10												


This is what the sheet will look like. The cells with “#####” happen because the width isn’t wide enough. Make the column wider to see the values.


## Exporting "All data (all records and fields)"


Select your export settings, which includes the export format (Excel/CSV, SAS, SPSS, R, Stata) and if you wish to perform de-identification on the data set.


### Choose export format


☐  CSV / Microsoft Excel (raw data)

☐  CSV / Microsoft Excel (labels)

☐  SPSS Statistical Software

☒  SAS Statistical Software

☐  R Statistical Software

☐  Stata Statistical Software

☐  CDISC ODM (XML)

### De-identification options (optional)

The options below allow you to limit the amount of sensitive information that you are exporting out of the project. Check all that apply.

#### Known Identifiers:

- ☐ Remove all tagged Identifier fields (tagged in Data Dictionary)
- ☐ Hash the Record ID field (converts record name to an unrecognizable value)

#### Free-form text:

- ☐ Remove unvalidated Text fields (i.e. free text)
- ☐ Remove Notes/Essay box fields

#### Date and datetime fields:

- ☐ Remove all date and datetime fields
- OR —
- ☐ Shift all dates by value between 0 and 364 days (shifted amount determined by algorithm for each record) [What is date shifting?](#)
  - ☐ Also shift all survey completion timestamps by value between 0 and 364 days (shifted amount determined by algorithm for each record)

[Deselect all options](#)

### Additional export options

- ☒ Export survey identifier field and survey timestamp field(s)?

If you are a SAS user, you may download your data in a format that is ready to be analyzed in SAS.

Export Data

Cancel



✓ Data export was successful!

The data export was successful, and your data is now ready to be downloaded. Click the download icon(s) below on the right to download your data file. If exporting to a specific statistical analysis package, you will additionally need to download the syntax file that is provided for that stats package. For more details, follow the instructions in the box below.

#### Citation Notice

Please **cite the REDCap project when publishing manuscripts** (citation information and template methods language are [available here](#)).



#### SAS Statistical Software

Download and save all 3 files on the right to a common location. First, double-click on the Pathway Mapper (.bat) file, which will run quickly and invisibly. (If you are not using a Windows operating system, such as Mac or Linux, please see the *Additional Instructions*.) Now double-click on the \*.sas file, which will open SAS. When the file is loaded and displayed, choose Run (or Run-->Submit) from the top menu options. This action will launch the script that will automatically read in all data and manipulate data fields with labels, option values, etc.

[Additional instructions](#)

Click icon(s) to download:



☒ [Send file?](#)

Close

With the SAS download option, be sure to follow the directions carefully. If you do, you will get the data in a CSV file, and also SAS code which will read in your data from that CSV file, and contains all of the Proc Format coding and variable labels so you don't have to create those manually!

# DATA COLLECTION

- You can easily modify your survey during this pre-production stage if you find any glitches or problems with your survey. Continue to test out your survey as you improve it.
- All of the data you have collected to test your survey can easily be wiped when you're ready to collect real data and move your survey into production.

# CONTACT INFORMATION

If you have any questions related to the content of this presentation, or have noticed that this presentation needs to be updated due to changes in the format of the REDCap website, please contact Kaeli Samson at [kksamson@unmc.edu](mailto:kksamson@unmc.edu).



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