STEP 2: DATA COLLECTION INSTRUMENTS

Main project settings
- Enable Use longitudinal data collection with repeating forms?
- Enable Use surveys in this project?

Design your data collection instruments
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), in which you may use either method or both. Quick links: Download PDF of all data collection instruments OR Download the current Data Dictionary.

Go to Online Designer or Data Dictionary

You may also browse for pre-built data collection instruments in the REDCap Shared Library.
Have you checked the Check For Identifiers page to ensure all identifier fields have been tagged?
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.
Ready to add fields

You may now begin adding fields to your data collection instrument below using the Online Designer. Alternatively, you may build your fields in the Data Dictionary (offline method) by clicking its tab above.

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.

Current instrument: Demographics

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.
FIELD TYPES

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

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 ---
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)
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

Field Annotation (optional)

Variable Name (utilized during data export)

ONLY letters, numbers, and underscores

Enable auto naming of variable based upon its Field Label?

Validation? (optional)

---- None ----

--- or ---

Enable searching within a biomedical ontology?

-- choose ontology to search --

Required?

* Prompt if field is blank

Yes

Identifier?

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

Yes

Custom Alignment

Align the position of the field on the page

Right / Vertical (RV)

Field Note (optional)

Small reminder text displayed underneath field

Save

Cancel
# Matrix of Fields

How often do you eat the following flavors of ice cream?

<table>
<thead>
<tr>
<th></th>
<th>Never</th>
<th>Rarely</th>
<th>Sometimes</th>
<th>Often</th>
<th>Always</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chocolate</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Strawberry</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vanilla</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Butter Pecan</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mint Chocolate Chip</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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
**MATRIX OF FIELDS**

Add Matrix of Fields

You may add or edit a matrix (i.e., grid) of project fields on this data collection instrument by completing the fields below. By providing all necessary info below and clicking Save, the new matrix of fields will be added to the form on this page. A Field Label and Variable name must be provided for each field in the matrix, and you must also set the Choices (i.e., matrix column headers) and answer format (Single Answer vs. Multiple Answers) for the entire matrix. View a matrix example or Read more about matrix fields on the Help & FAQ.

Matrix Header Text (optional)

How often do you eat the following flavors of ice cream?

Matrix Rows

Each row represents a different field with its own label and variable name.

<table>
<thead>
<tr>
<th>Field Label</th>
<th>Variable Name</th>
<th>Required?</th>
<th>Field Annotation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chocolate</td>
<td>choc</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Strawberry</td>
<td>straw</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vanilla</td>
<td>van</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Butter Pecan</td>
<td>buspec</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mint Chocolate Chip</td>
<td>mintcc</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Add another row

Matrix Column Choices

Choices (one choice per line)

1. Never
2. Rarely
3. Sometimes
4. Often
5. Always

How do I manually code the choices?

Other Matrix Info

Answer Format:

- Single Answer (Radio Buttons)

Ranking:

- What is a ranked matrix of fields?
- Allow only 1 choice to be selected per column (radio buttons only)

Matrix group name:

- icecream matrix

Save | Cancel
What is your favorite flavor of ice-cream?
What is your favorite kind of ice cream?

- Chocolate
- Strawberry
- Vanilla
- Other

If other, please specify
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: other_text - if other, please specify

- Advanced Branching Logic Syntax
  (How do I use the advanced syntax?)

Show the field ONLY if...

- OR -

- Drag-N-Drop Logic Builder

Displaying field choices for the following data collection instrument:
Form 1 Set Up As A Survey

Field choices from other fields (drag a choice below to box on right)
- fav_icecream = Chocolate (1)
- fav_icecream = Strawberry (2)
- fav_icecream = Vanilla (3)
- fav_icecream = Other (4)
- icecream = Chocolate (1)
- icecream = Strawberry (2)
- icecream = Vanilla (3)
- icecream = Other (4)
- icecream_other = (define criteria)

Show the field ONLY if...
- ALL below are true
- ANY below are true

icecream = Other (4)

Drag and Drop

Clear logic

Save Cancel
What kind of ice cream do you like?
- Chocolate
- Strawberry
- Vanilla

How often do you eat ______ ice cream?
- Once a week
- Twice a week
- Three times a week
PIPING LOGIC
STEP 3: OPTIONAL MODULES & CUSTOMIZATIONS

Enable optional modules and customizations
- Enable 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
**STEP 4: PROJECT BOOKMARKS**

---

**Set up project bookmarks (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 by users who are given privileges to do so. Every project bookmark has custom settings that allow one to control its appearance and behavior.

Go to [Add or edit bookmarks](#).

---

<table>
<thead>
<tr>
<th>Link #</th>
<th>Link Label</th>
<th>Link URL / Destination</th>
<th>Link Type</th>
<th>User Access</th>
<th>Opens new window</th>
<th>Append record info to URL</th>
<th>Append project ID to URL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add</td>
<td>Asthma Center</td>
<td><a href="http://asthma.bsd.uchicago.edu/">http://asthma.bsd.uchicago.edu/</a></td>
<td>Simple Link</td>
<td>All users</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

*Enter the label for the link as it is seen on the left-hand menu.*

*Enter the web address (URL) for the link (e.g., http://www.mysite.com/mypage.html).*
STEP 5: USER RIGHTS

This page may be used for granting users access to this project and for managing the user privileges of those users. You may also create roles to which you may assign users (optional). User roles are useful when you will have several users with the same privileges because they allow you to easily add many users to a role in a much faster manner than setting their user privileges individually. Roles are also a nice way to categorize users within a project. In the box below you may add/assign users or create new roles, and the table at the bottom allows you to make modifications to any existing user or role in the project, as well as view a glimpse of their user privileges.

Add new users: Give them custom user rights or assign them to a role.
- Add new user
- Assign new user

Create new roles: Add new user roles to which users may be assigned.
- Enter new role name
- Create role
STEP 5: USER RIGHTS

- Basic Rights
  - Expiration Date
  - Highest level privileges:
    - Project Design and Setup
    - User Rights
    - Data Access Groups

- Privileges for data exports (including PDFs and API exports), reports, and stats:
  - Data Exports
    - De-identified means that all free-form text fields will be removed, as well as any database-wide fields and identifier fields.
  - Add/Edit Reports
    - Allows user to view all reports.

- Other privileges:
  - Manage Survey
  - Participants
  - Calendar
  - Data Import Tool
  - Data Comparison Tool
  - Logging
  - File Repository
  - Data Quality
    - Create & edit rules
  - API
    - API Export
    - API Import

Data Entry Rights

<table>
<thead>
<tr>
<th>Form 1 Set Up As A Survey (survey)</th>
<th>No Access</th>
<th>Read Only</th>
<th>View &amp; Edit</th>
<th>Add survey responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Formatting Fun (survey)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

New User Notification

- Notify user of their project access via email?
Test your project thoroughly

It is important to test the essential components of your project before moving it into production. Try creating a few test records and entering some data for each to ensure that your data collection instruments look and behave how you expect, especially branching logic and calculations. Then review your test data by creating reports and exporting your data to view in Excel or a statistical analysis package. If you have surveys, complete the surveys as if you were a participant by using the Public Survey Link or Participant List by sending a survey invitation to yourself. If other project modules will be used regularly, test them out a bit too. The best way to test your project is to use it as if you were entering real production data, and it is always helpful to have colleagues (especially team members) take a look at your project to get a fresh set of eyes looking at it.
STEP 7: MOVE TO PRODUCTION

Move your project to production status

Move the project to production status so that real data may be collected. Once in production, you will not be able to edit the project fields in real time anymore. However, you can make edits in Draft Mode, which will then need to be approved by a REDCap administrator before taking effect.

Go to Move project to production