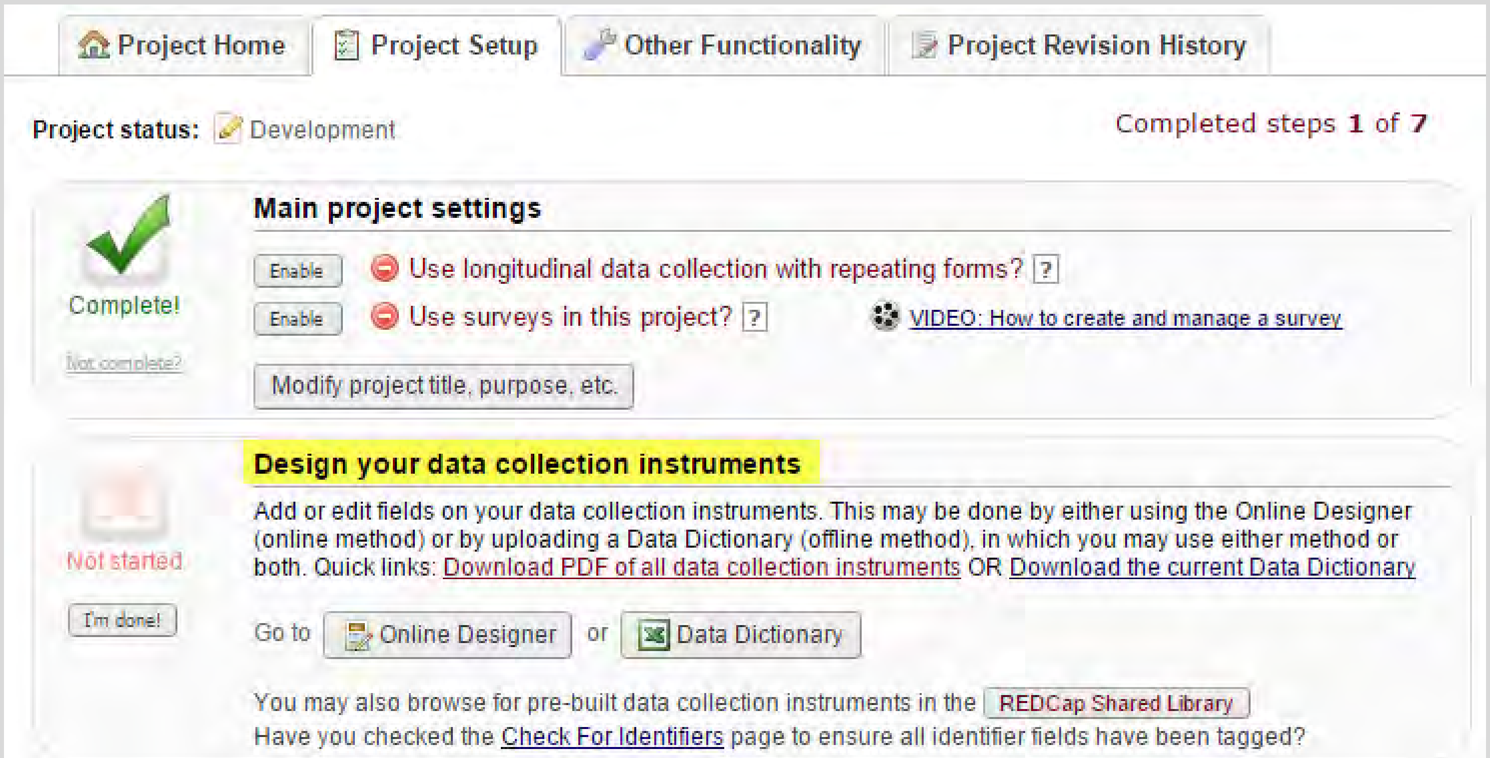
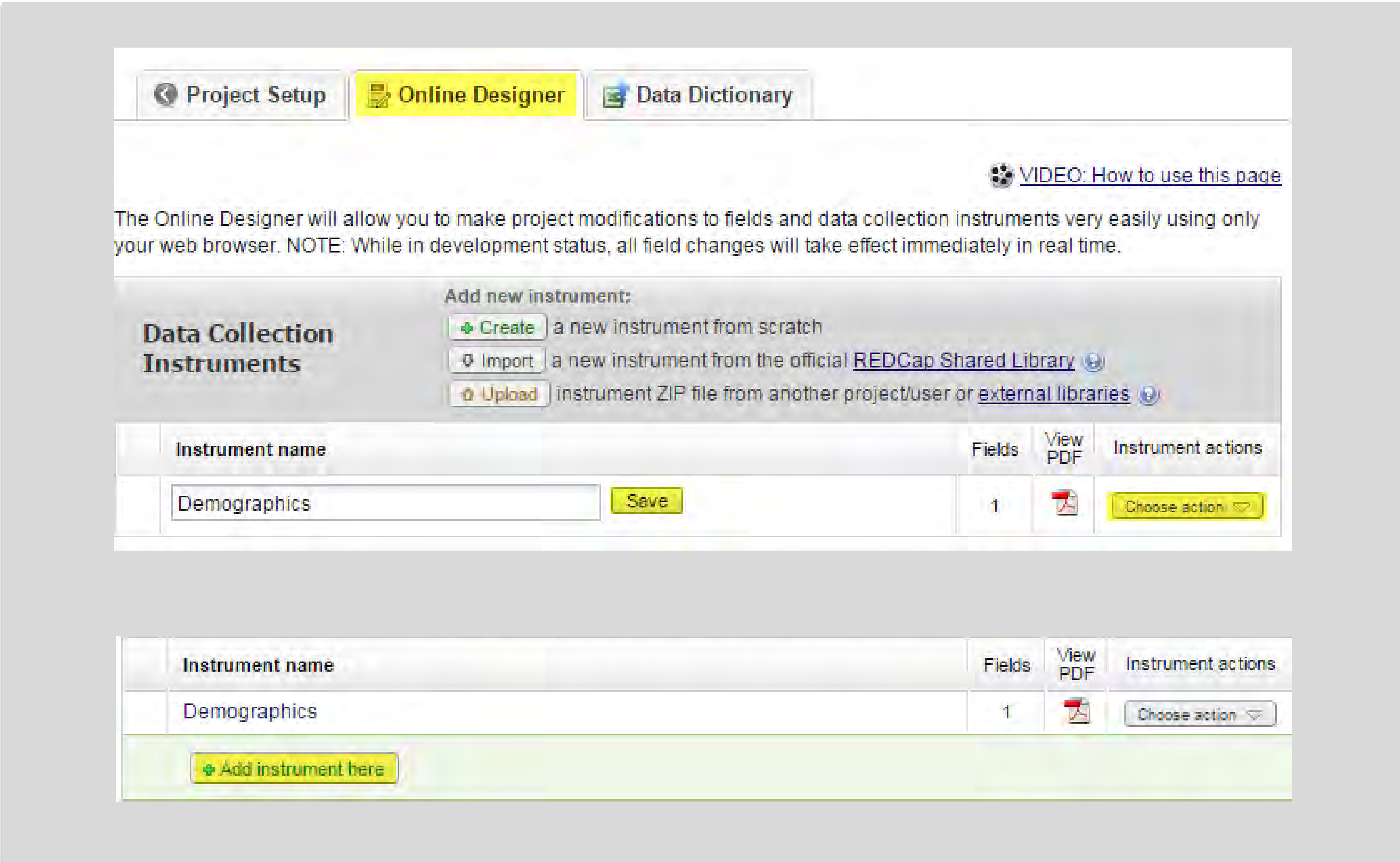
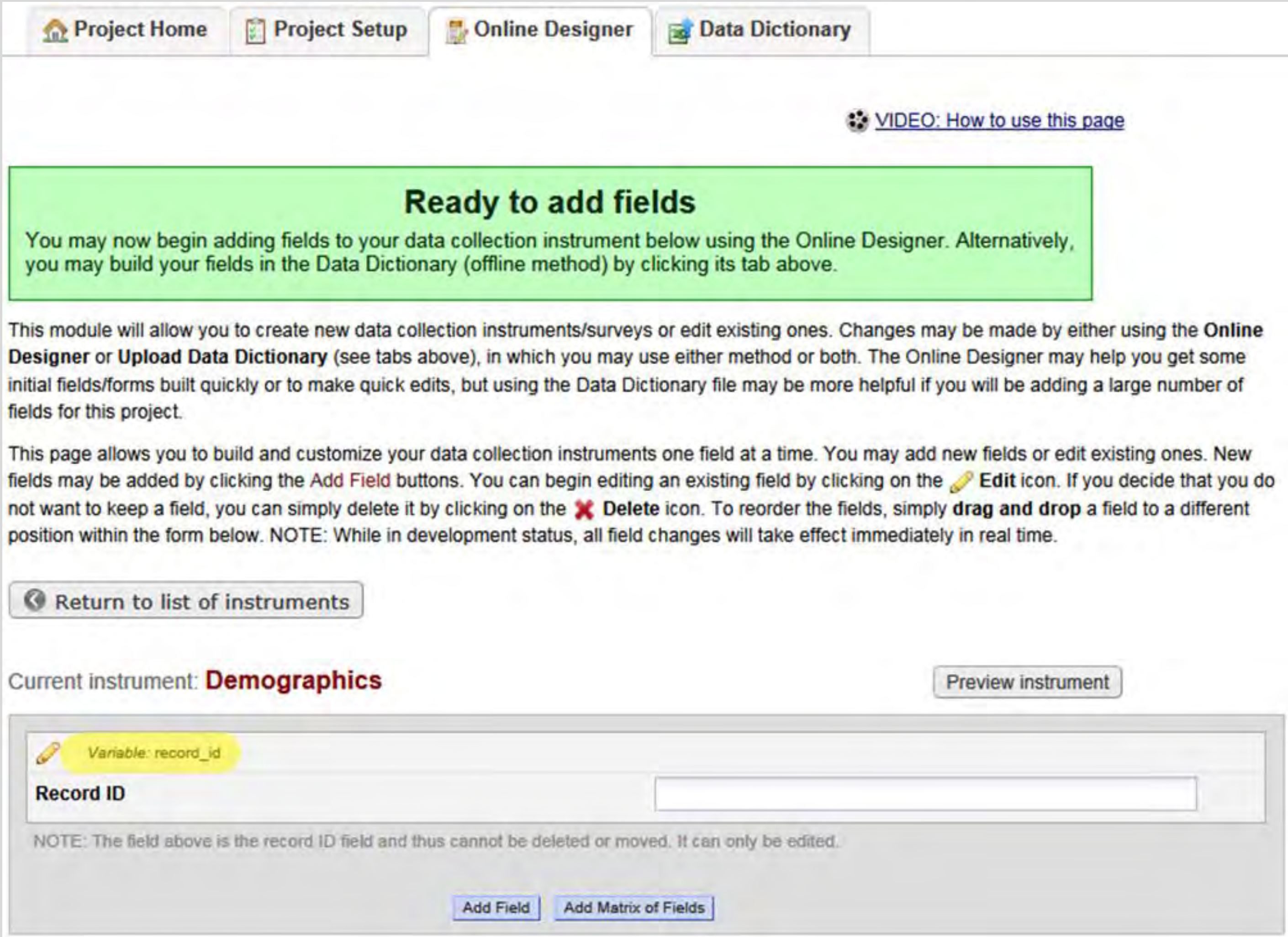
STEP 2: DATA COLLECTION INSTRUMENTS



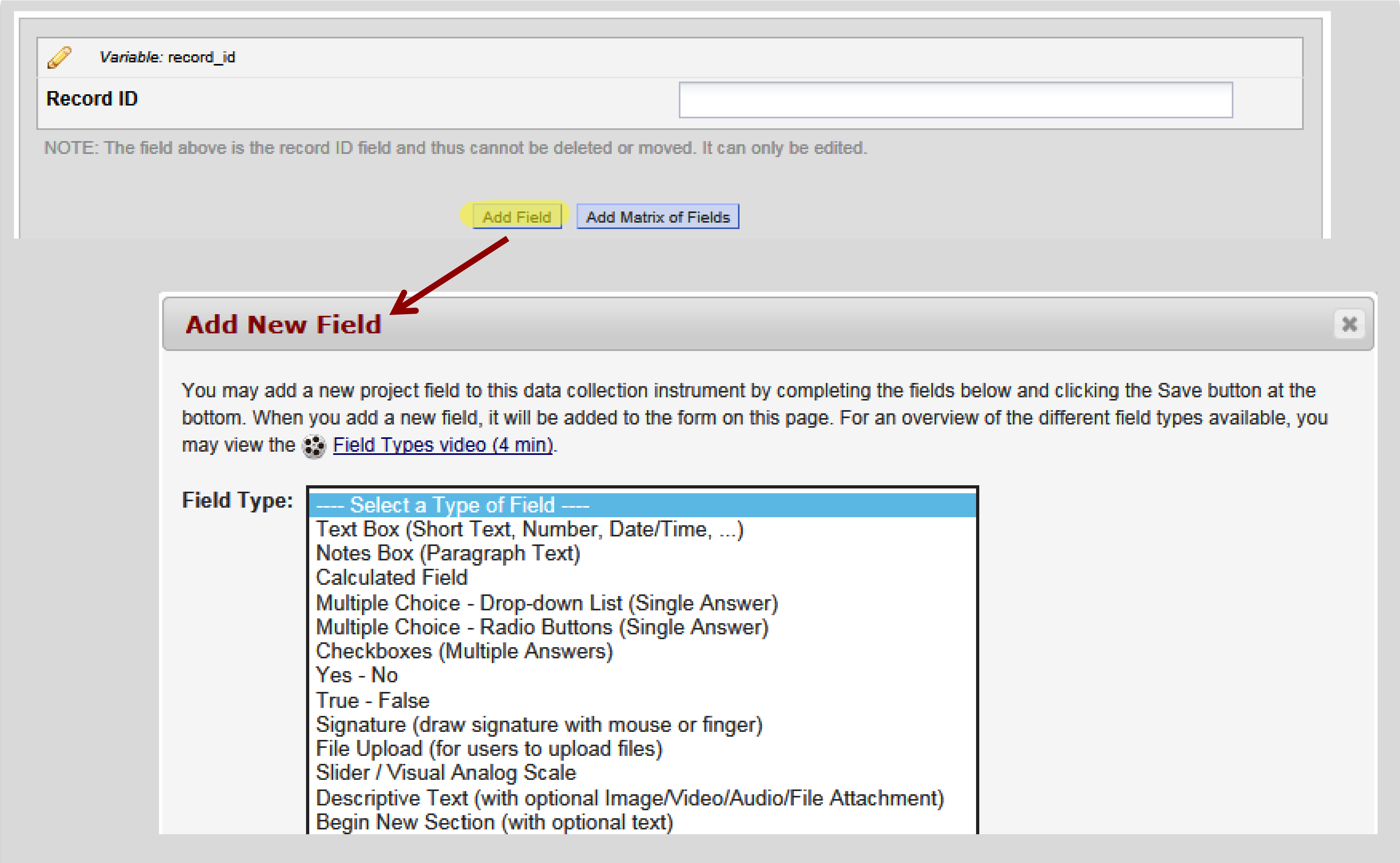
ONLINE DESIGNER



RECORD IDENTIFIER



FIELD TYPES


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
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 ----
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)

FIELD DESIGN

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

Field Annotation (optional) Learn about Action Tags

Explanatory notes - not displayed on any page ?

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?* 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)

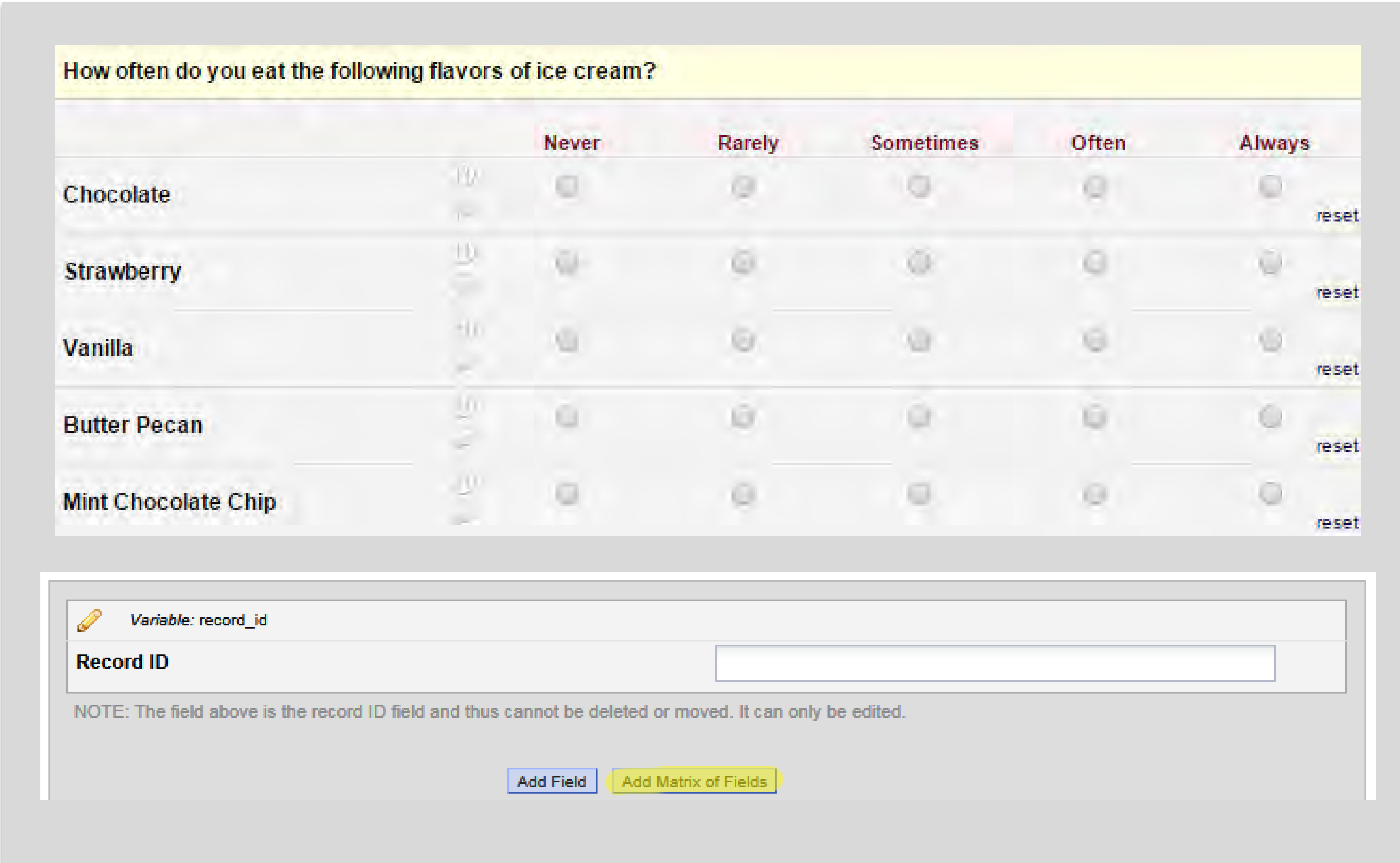
Align the position of the field on the page

Field Note (optional)

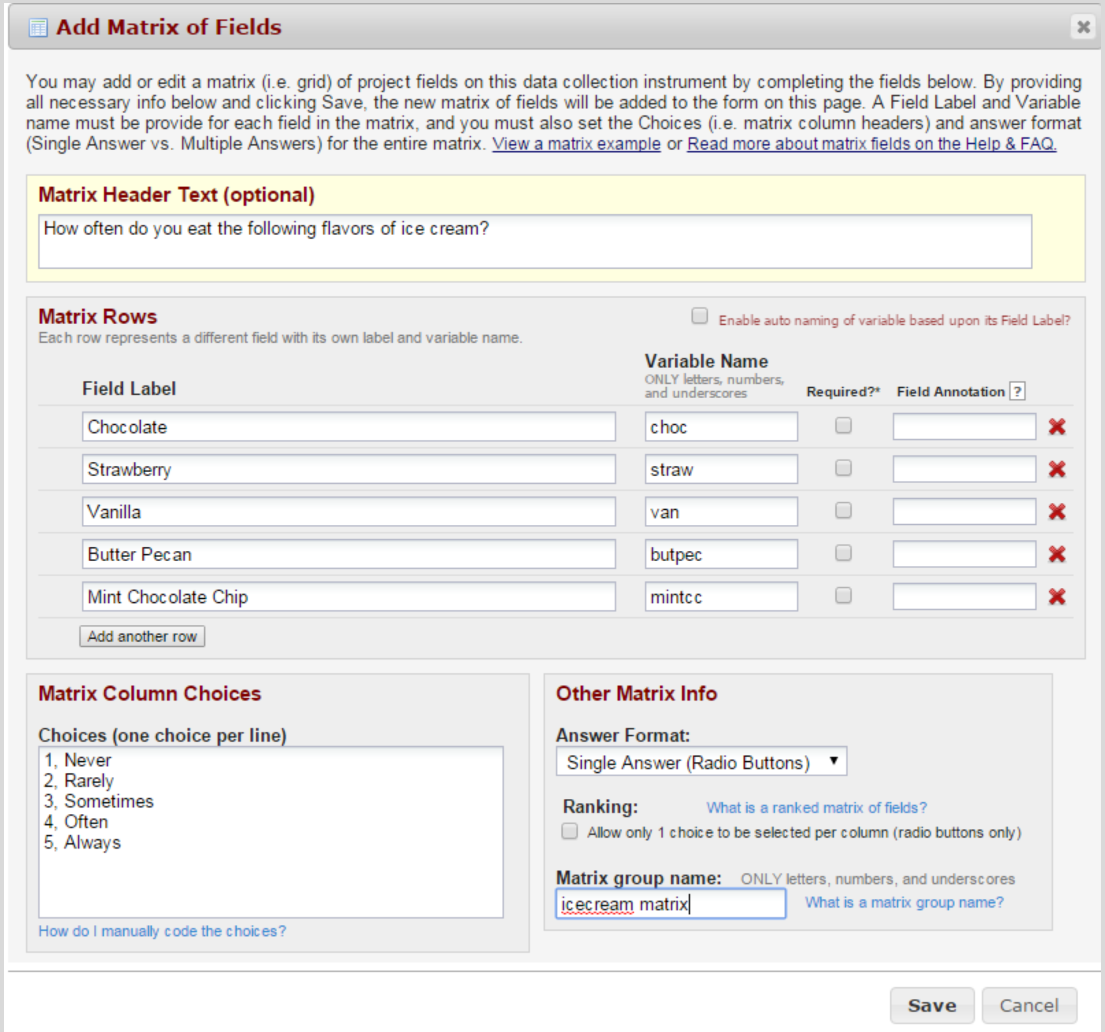
Small reminder text displayed underneath field

Save Cancel

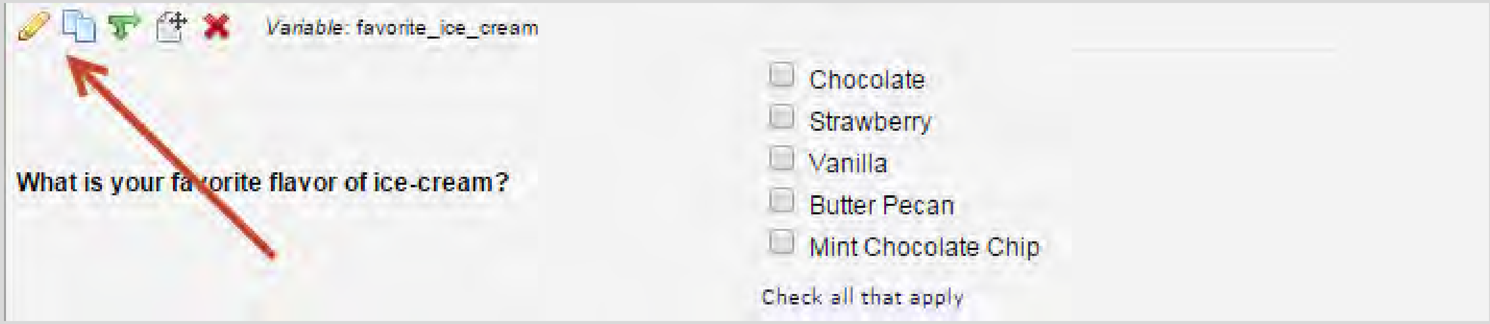
MATRIX OF FIELDS



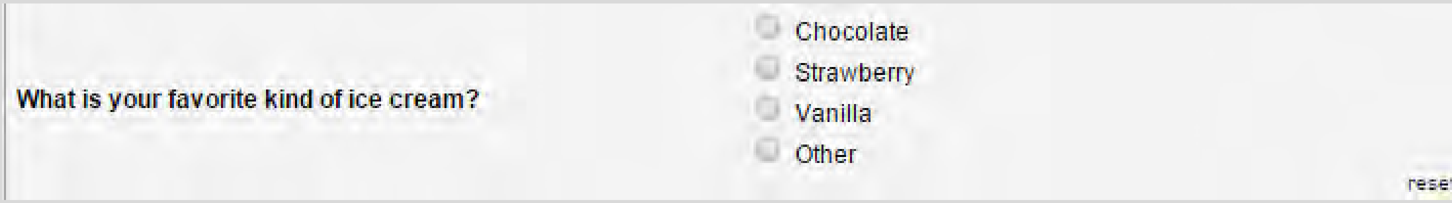
MATRIX OF FIELDS

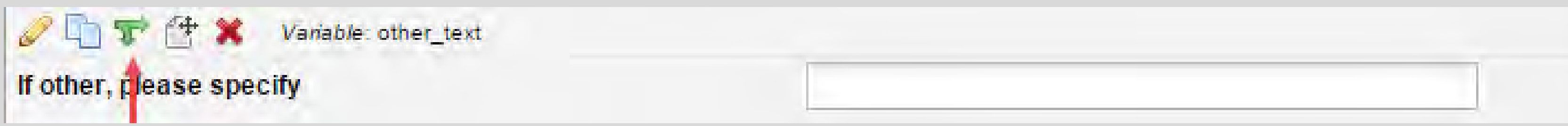


EDIT/COPY/MOVE/DELETE FIELDS

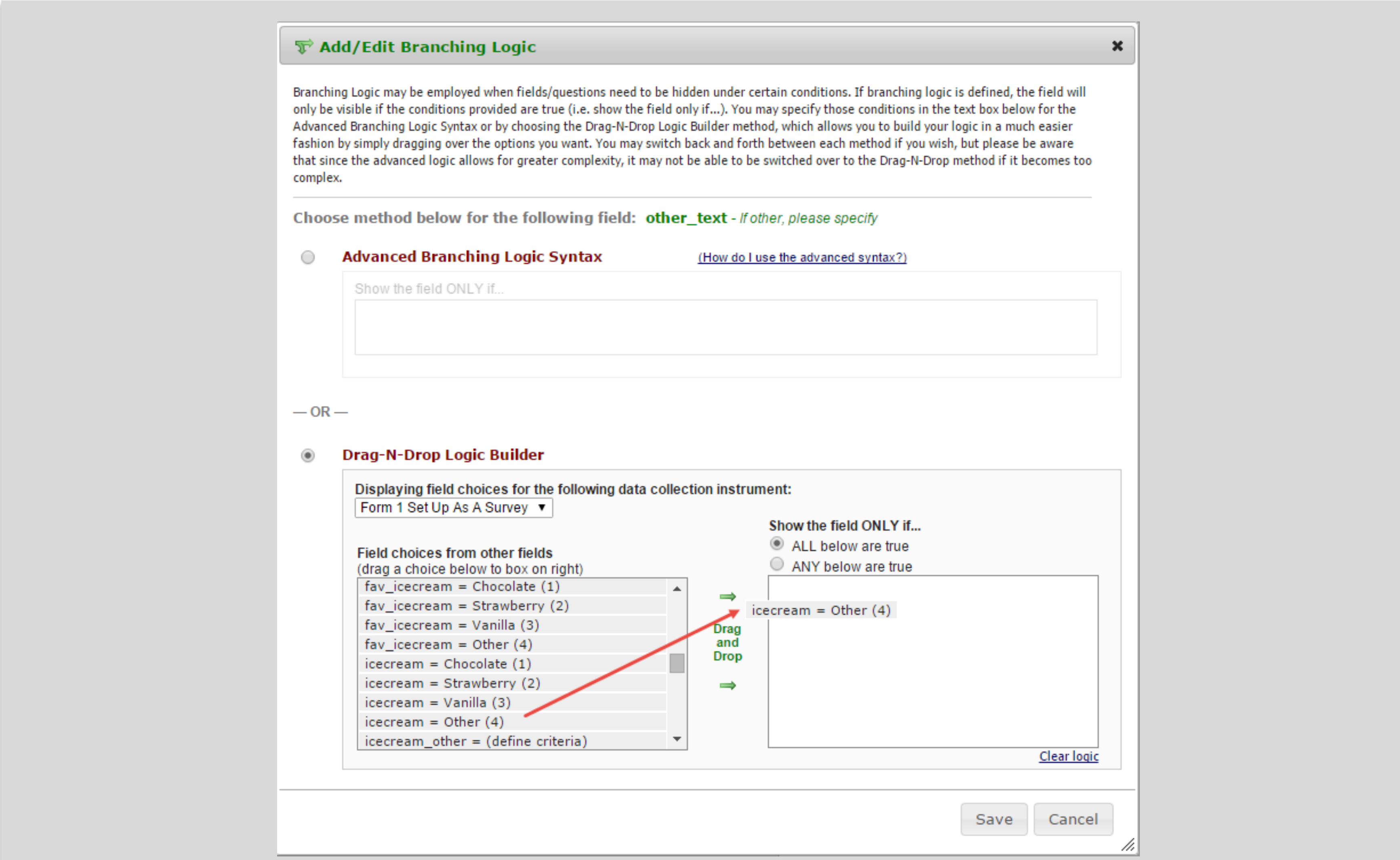


BRANCHING LOGIC

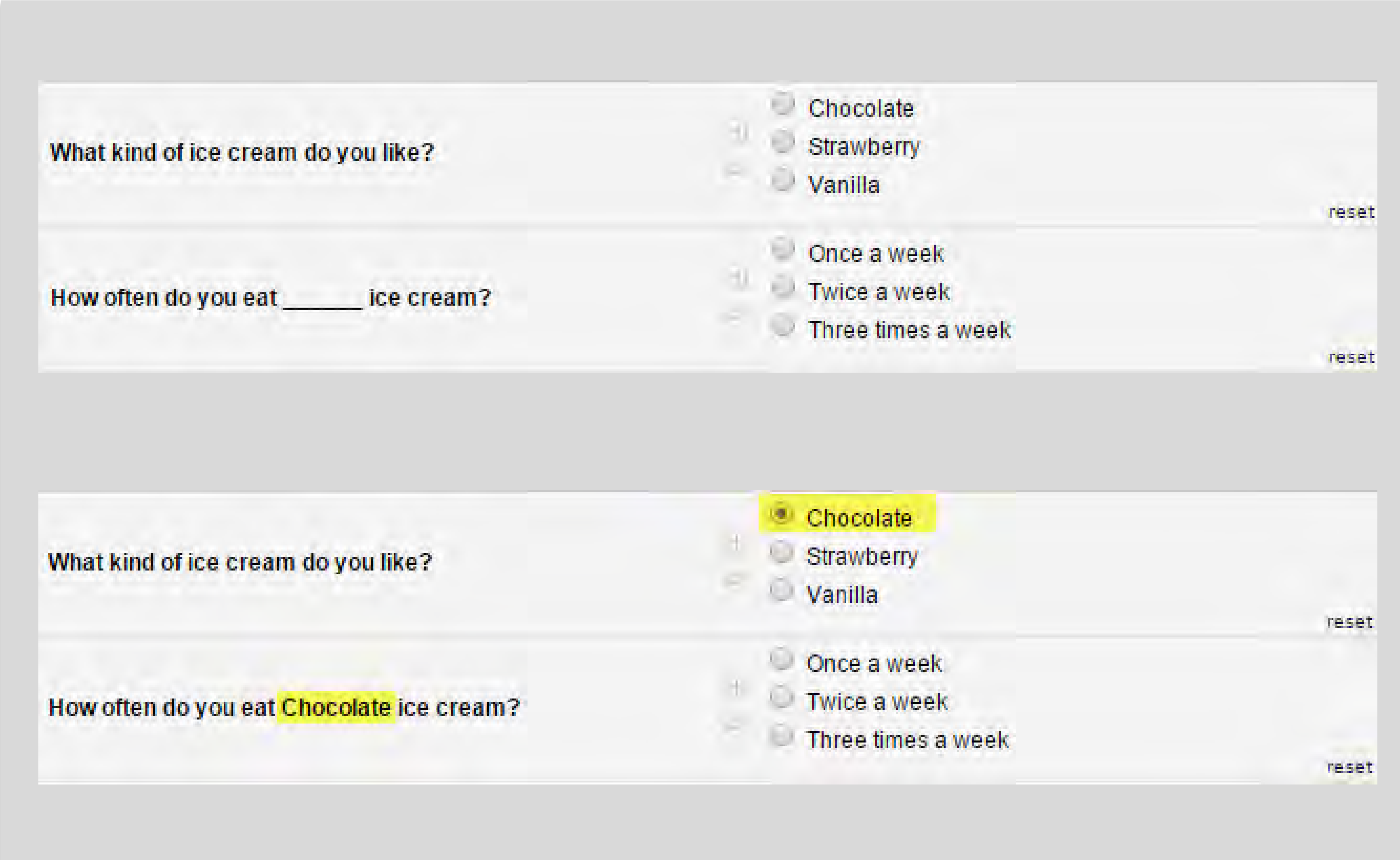




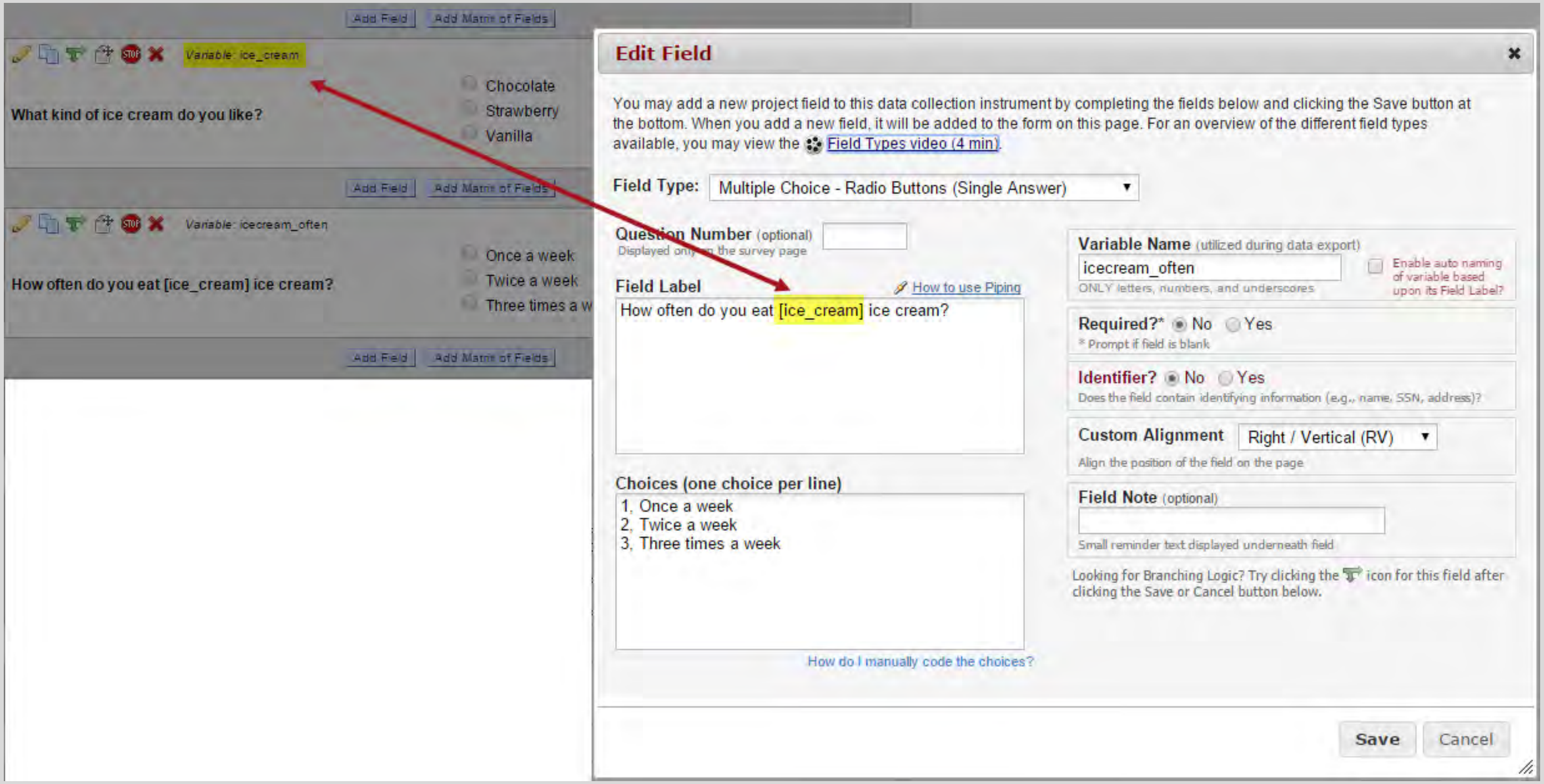
BRANCHING LOGIC



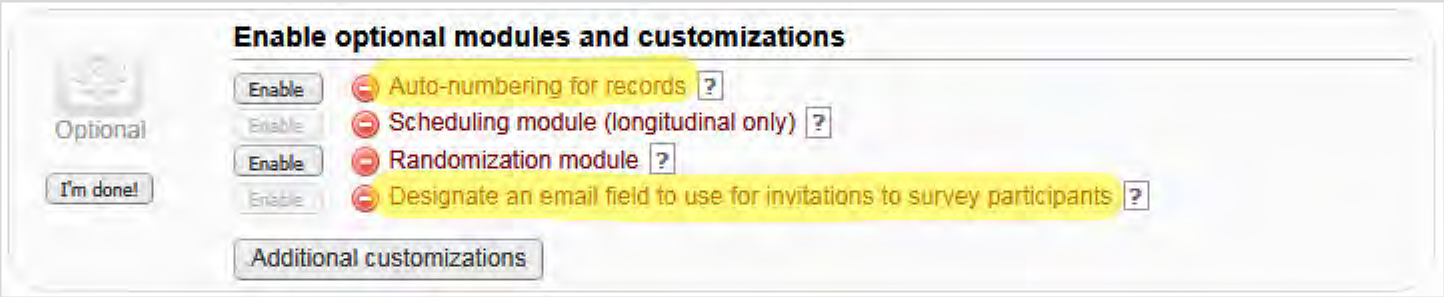
PIPING LOGIC



PIPING LOGIC



STEP 3: OPTIONAL MODULES & CUSTOMIZATIONS



STEP 4: PROJECT BOOKMARKS

Optional

I'm done!

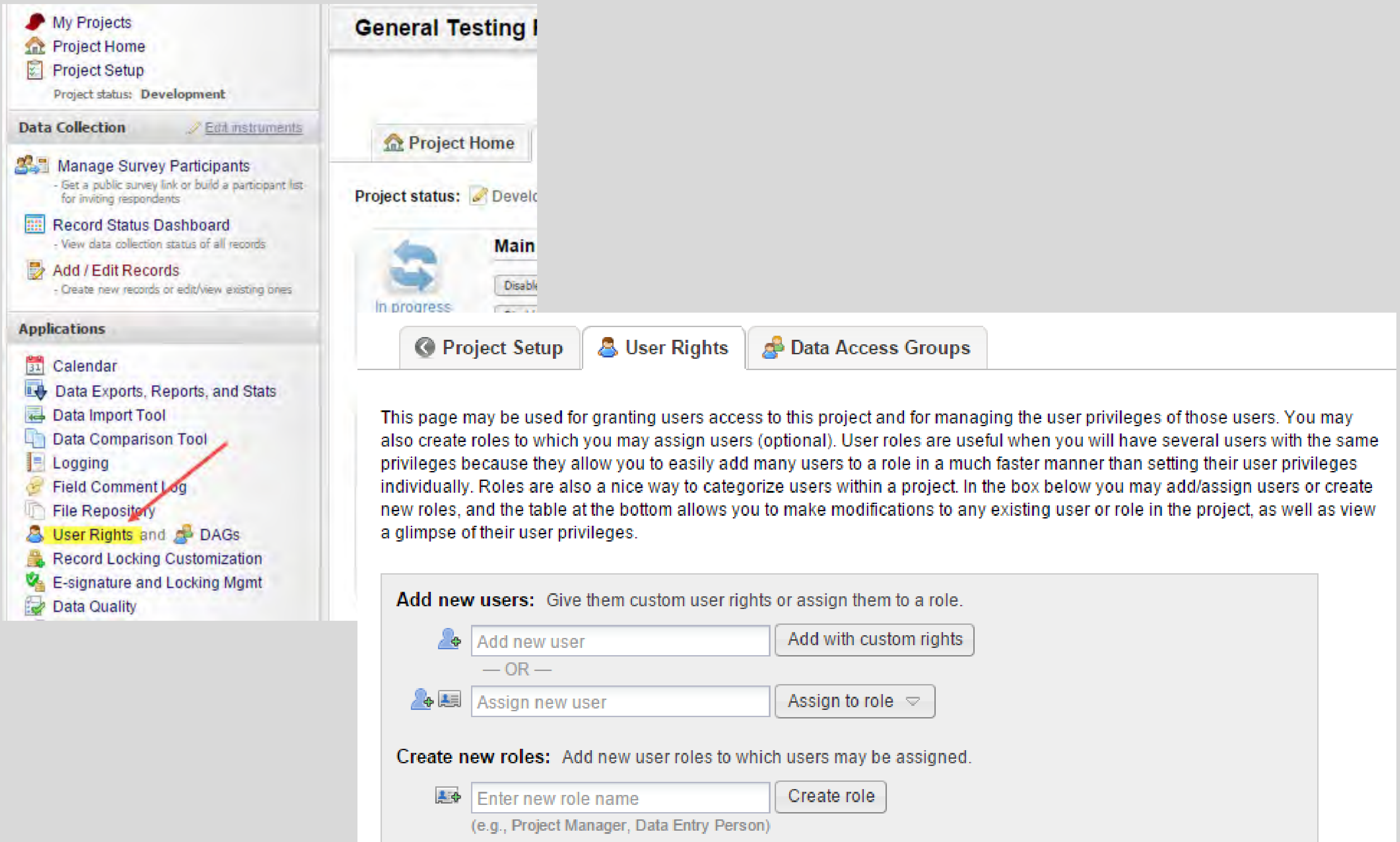
Set up project bookmarks (optional)

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.

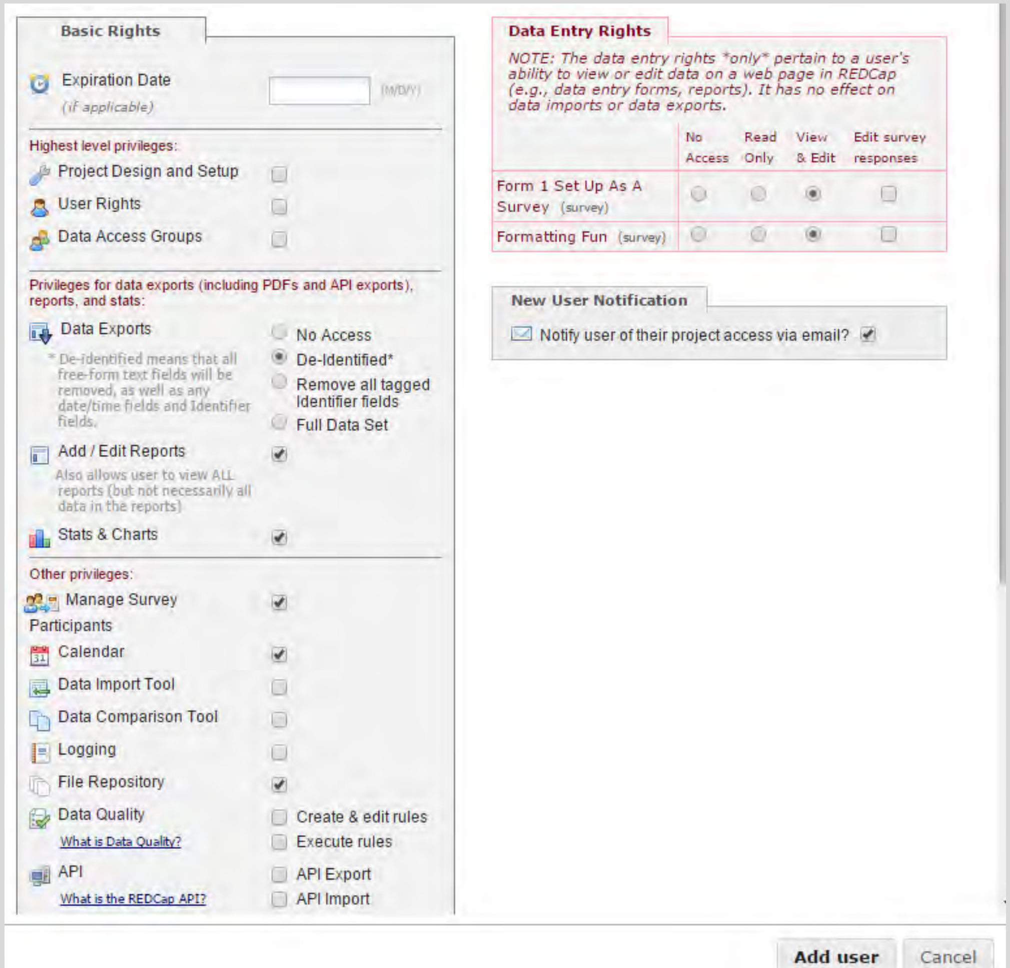
Go to Add or edit bookmarks

Link #	Link Label	Link URL / Destination	Link Type	User Access	Opens new window	Append record info to URL	Append project ID to URL
Add	Asthma Center Enter the label for the link as it is seen on the left-hand menu	http://asthma.bsd.uchicago.edu/ Enter the web address (URL) for the link (e.g., http://www.mysite.com/mypage.html)	Simple Link	◉ All users ○ Selected users	☑	☐	☐

STEP 5: USER RIGHTS



STEP 5: USER RIGHTS



STEP 6: TEST YOUR PROJECT

Complete!

Not complete?

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.

STEP7: MOVE TO PRODUCTION