

STEP 2: DATA COLLECTION INSTRUMENTS

Project Home | Project Setup | Other Functionality | Project Revision History

Project status: Development Completed steps 1 of 7

Complete!
[Not complete?](#)

Main project settings

Use longitudinal data collection with repeating forms? [?](#)

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

Not started

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 or

You may also browse for pre-built data collection instruments in the

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

▶ ONLINE DESIGNER

◀ Project Setup

📄 Online Designer

📖 Data Dictionary

🎥 [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.

Data Collection Instruments

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
<input type="text" value="Demographics"/> <input type="button" value="Save"/>	1		<input type="button" value="Choose action"/>

Instrument name	Fields	View PDF	Instrument actions
Demographics	1		<input type="button" value="Choose action"/>

➕ Add instrument here



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RECORD IDENTIFIER



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


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

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.

 [Return to list of instruments](#)

Current instrument: **Demographics**

[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](#)

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)



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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)

Enable auto naming of variable based upon its Field Label?

ONLY letters, numbers, 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



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▶ MATRIX OF FIELDS

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

		Never	Rarely	Sometimes	Often	Always	
Chocolate	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	reset
Strawberry	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	reset
Vanilla	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	reset
Butter Pecan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	reset
Mint Chocolate Chip	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	reset

 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.

Enable auto naming of variable based upon its Field Label?

Field Label	Variable Name <small>ONLY letters, numbers, and underscores</small>	Required?*	Field Annotation ?
Chocolate	choc	<input type="checkbox"/>	<input type="text"/> ✖
Strawberry	straw	<input type="checkbox"/>	<input type="text"/> ✖
Vanilla	van	<input type="checkbox"/>	<input type="text"/> ✖
Butter Pecan	butpec	<input type="checkbox"/>	<input type="text"/> ✖
Mint Chocolate Chip	mintcc	<input type="checkbox"/>	<input type="text"/> ✖
<input type="button" value="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: ONLY letters, numbers, and underscores

icecream matrix

[What is a matrix group name?](#)

Save

Cancel

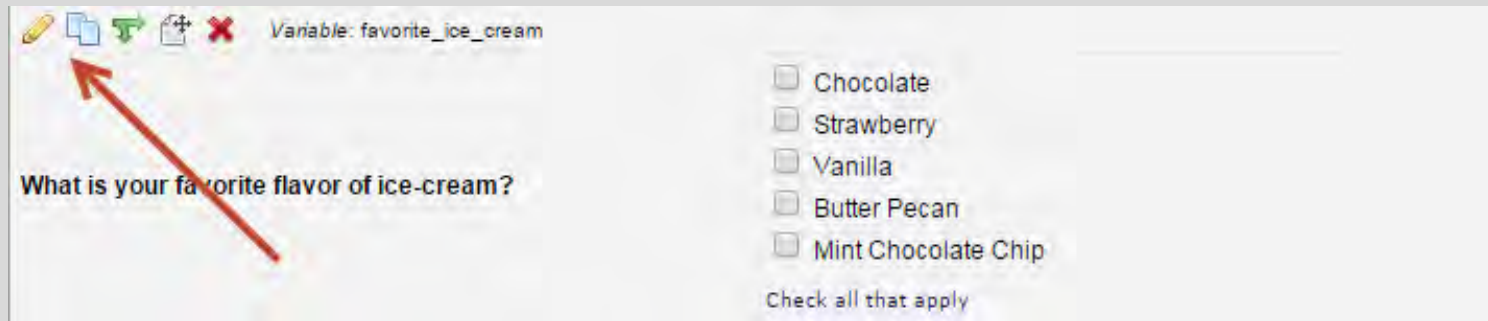
EDIT/COPY/MOVE/DELETE FIELDS

Variable: favorite_ice_cream

What is your favorite flavor of ice-cream?

- Chocolate
- Strawberry
- Vanilla
- Butter Pecan
- Mint Chocolate Chip

Check all that apply



BRANCHING LOGIC

What is your favorite kind of ice cream?

Chocolate
 Strawberry
 Vanilla
 Other

reset

     Variable: other_text

If other, please specify

BRANCHING LOGIC

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: **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

▶ PIPING LOGIC

What kind of ice cream do you like?

- Chocolate
- Strawberry
- Vanilla

reset

How often do you eat _____ ice cream?

- Once a week
- Twice a week
- Three times a week

reset

What kind of ice cream do you like?

- Chocolate
- Strawberry
- Vanilla

reset

How often do you eat **Chocolate** ice cream?

- Once a week
- Twice a week
- Three times a week

reset

PIPING LOGIC

The screenshot shows the REDCap interface for editing a survey instrument. On the left, two questions are visible:

- Question 1: "What kind of ice cream do you like?" with radio button options: Chocolate, Strawberry, and Vanilla. The variable name is `ice_cream`.
- Question 2: "How often do you eat [ice_cream] ice cream?" with radio button options: Once a week, Twice a week, and Three times a week. The variable name is `icecream_often`.

The "Edit Field" dialog box is open, showing the configuration for the selected field. A red arrow points from the `ice_cream` variable name in the second question to the "Field Type" dropdown menu.

Edit 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)**

Question Number (optional)
Displayed only on the survey page

Field Label [How to use Piping](#)
How often do you eat [ice_cream] ice cream?

Choices (one choice per line)

- Once a week
- Twice a week
- Three times a week

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

Variable Name (utilized during data export)
`icecream_often` Enable auto naming of variable based upon its Field Label?
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

Looking for Branching Logic? Try clicking the icon for this field after clicking the Save or Cancel button below.

Save **Cancel**

STEP 3: OPTIONAL MODULES & CUSTOMIZATIONS



Optional

I'm done!

Enable optional modules and customizations

<input type="button" value="Enable"/>	<input type="checkbox"/> Auto-numbering for records ?
<input type="button" value="Enable"/>	<input type="checkbox"/> Scheduling module (longitudinal only) ?
<input type="button" value="Enable"/>	<input type="checkbox"/> Randomization module ?
<input type="button" value="Enable"/>	<input type="checkbox"/> Designate an email field to use for invitations to survey participants ?

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	<input type="text" value="Asthma Center"/> <small>Enter the label for the link as it is seen on the left-hand menu</small>	<input type="text" value="http://asthma.bsd.uchicago.edu"/> <small>Enter the web address (URL) for the link (e.g., http://www.mysite.com/mypage.html)</small>	<input type="text" value="Simple Link"/>	<input checked="" type="radio"/> All users <input type="radio"/> Selected users	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



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STEP 5: USER RIGHTS

- My Projects
- Project Home
- Project Setup
- 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
- Applications
 - Calendar
 - Data Exports, Reports, and Stats
 - Data Import Tool
 - Data Comparison Tool
 - Logging
 - Field Comment Log
 - File Repository
 - User Rights** and DAGs
 - Record Locking Customization
 - E-signature and Locking Mgmt
 - Data Quality

General Testing I

Project Home

Project status: **Development**

Main

In progress

- Project Setup
- User Rights**
- Data Access Groups

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.

— OR —

Create new roles: Add new user roles to which users may be assigned.

(e.g., Project Manager, Data Entry Person)

STEP 5: USER RIGHTS

Basic Rights

Expiration Date (M/D/Y)
(if applicable)

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 No Access
 De-identified*
 Remove all tagged identifier fields
 Full Data Set

* De-identified means that all free-form text fields will be removed, as well as any date/time fields and Identifier fields.

Add / Edit Reports
Also allows user to view ALL reports (but not necessarily all data in the reports)

Stats & Charts

Other privileges:

- Manage Survey
- Participants
- Calendar
- Data Import Tool
- Data Comparison Tool
- Logging
- File Repository
- Data Quality Create & edit rules
 Execute rules
[What is Data Quality?](#)
- API API Export
 API Import
[What is the REDCap API?](#)

Data Entry Rights

*NOTE: The data entry rights *only* pertain to a user's ability to view or edit data on a web page in REDCap (e.g., data entry forms, reports). It has no effect on data imports or data exports.*

	No Access	Read Only	View & Edit	Edit survey responses
Form 1 Set Up As A Survey (survey)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>
Formatting Fun (survey)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>

New User Notification

Notify user of their project access via email?



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.



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STEP 7: MOVE TO PRODUCTION



Not started

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](#)