

ENABLING SURVEYS

Step 1:

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](#)

Step 2:

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

Survey options:

Add new instrument:

a new instrument from scratch

a new instrument from the official [REDCap Shared Library](#) 

instrument ZIP file from another project/user or [external libraries](#) 

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Demographics	20		<input type="button" value="Enable"/>	<input type="button" value="Choose action"/> 	

▶ SURVEY SETTINGS

 Set up my survey for data collection instrument "Ice Cream Survey"

Basic Survey Options:

 **Survey Title**
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

Survey Design Options:



Logo

(Optional: display an image above the survey title)

Add new logo:

(Images wider than 600 pixels will be downsized to fit page.)

If using a logo, hide survey title on survey page?



Size of survey text

Normal



Font of survey text

Arial



Survey theme

University of Chicago

Survey design preview (sample survey):

[Expand](#)

This is the survey title

Your survey instructions will go here. The instructions can tell your survey participant about the purpose of the survey and what to expect once they have completed the survey. Below is a listing of various question types that might be displayed on your survey.

This is a section header to divide the survey page into sections.

What is your first name?

What days of the week do you work? (check all that apply)

▶ SURVEY CUSTOMIZATIONS

Survey Customizations:

☰ Question Numbering

Auto numbered ▼



Question Display Format

(One page or multiple pages?)

All on one page ▼

Display page numbers at top of survey page

Hide the 'Previous Page' button (i.e., Back button) on the survey page
(prevents respondents from going back to previous pages)



For 'Required' fields, display the red 'must provide value' text on the survey page?

Yes ▼

If 'No', then it will NOT display the following text beneath all 'Required' fields: *** must provide value**



Allow survey respondents to view aggregate survey results after completing the survey?

After completing the survey, participants can view ALL responses in aggregate graphical format and/or as descriptive statistics. Also, the individual respondent's answers will be highlighted in the results.

Disabled ▼

Additional settings:

10

Minimum number of responses required before participants are allowed to view aggregate data (recommended = 10).



Do not show plots for questions lacking diversity in response values?
([What does this mean?](#))



Text-To-Speech functionality

(Allows text on survey page to be read audibly to participants.)

When enabled, icons will be displayed next to all text on the survey page, and when clicked, the text will be read out loud to the participant (must have computer speakers turned on).

Disabled ▼

NOTICE: All text that is spoken is sent to a service hosted at Vanderbilt University that utilizes the AT&T Text-to-Speech API service. Be advised that if the survey utilizes piping, for privacy concerns, data piped from Identifier fields will ***not*** be sent to the service with the rest of the text but will instead be redacted.

[Super users: How to disable this feature](#)

▶ SURVEY ACCESS

Survey Access:



Survey Expiration (optional)

(Time after which the survey will become inactive.)



M/D/Y H:M

The time must be for the time zone **America/Chicago**, in which the current time is **08/11/2016 13:18**.



Allow 'Save & Return Later' option for respondents?

(Allow respondents to leave the survey and return later.)

Allow respondents to return and modify completed responses?

▶ SURVEY TERMINATION OPTIONS

Survey Termination Options:

(Optional) Auto-continue to next survey: Automatically start the next survey instrument after finishing this survey 

— OTHERWISE —

Redirect to a URL
(Redirect to a webpage when survey is completed)

Provide a full URL, e.g. <http://www.example.com/mypage.html>

 [How to use Piping here](#)

— OR —

Survey Completion Text
(Displayed after survey is completed as 'thank you' text or as acknowledgement text)

Thank you for taking the survey.

Have a nice day!



 [How to use Piping here](#)

Send confirmation email (optional)?
(Email the respondent when they complete the survey)

No

Save Changes

▶ PUBLIC SURVEY LINK

 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. [Get shorter survey link](#) or [Get embed code to place link on a webpage](#).

Public Survey URL:

 Copy to clipboard

OR

Short Public Survey URL:

 Copy to clipboard

Copy the HTML in the text box below to place it within the HTML code of any webpage. It will show up as a link on that webpage so that anyone can easily click the link to begin taking your survey.

Embed HTML code < >

 Copy to clipboard

 Open public survey

 Send me URL via email

PRIVATE SURVEY LINKS

Manage Survey Participants

 Public Survey Link

 Participant List

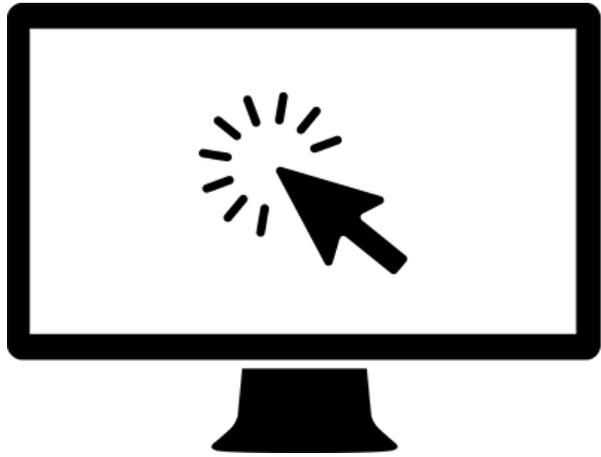
 Survey Invitation Log

The Participant List option allows you to **send a customized email** to anyone in your list and **track who responds to your survey**. It is also possible to identify an individual's survey answers, if desired, by providing an Identifier for each participant (this feature must first be enabled by clicking the 'Enable' button in the table below). Unless an Identifier is used, all survey responses collected are considered anonymous. [More details](#)

Participant List belonging to [Initial survey] "Pre Screening Survey" ▾ Remove all participants

Displaying 1 - 10 ▾ of 10  Add participants  Compose Survey Invitations  Export list

Email	Participant Identifier (optional) Disable	Link	Invitation Scheduled?	Invitation Sent?	Responded?	
arodrigu1@bsd.uchicago.edu	Alex Rodriguez		-			remove
braumann@bsd.uchicago.edu (ID 2)	Bonnie Trumann		-			remove
braumann@ci.uchicago.edu (ID 3)	Brenda Starr	-	-			remove
brigitte_raumann@yahoo.com	Brigitte Raumann		-			remove
dermoore82@gmail.com	Derrick Moore		-			remove
jimtaylor@yahoo.com	Jim Taylor		-			remove
john.williams@hotmail.com	John Williams		-			remove
kle@bsd.uchicago.edu	Kevin Le		-			remove
nbahroos@bsd.uchicago.edu	Neil Bahroos		-			remove
putnamtr@gmail.com	ID 4930-72		-			remove



Live Demo



Applications & Tools

RECORD STATUS DASHBOARD

Form Status

Complete?



Complete

Save Record

Save and Continue

Record Status Dashboard (all records)

Displayed below is a table listing all existing records/responses and their status for every data collection instrument (and if longitudinal, for every event). You may click any of the colored buttons in the table to open a new tab/window in your browser to view that record on that particular data collection instrument. Please note that if your form-level user privileges are restricted for certain data collection instruments, you will only be able to view those instruments, and if you belong to a Data Access Group, you will only be able to view records that belong to your group.

Legend for status icons:

- Incomplete
- Incomplete (no data saved)
- Unverified
- Partial Survey Response
- Complete
- Completed Survey Response

Displaying record "1" through "5" of 5 records

Displaying: [Instrument status only](#) | [Lock status only](#) | [All status types](#)

Study Id	Ice Cream Survey
1	
2	
3	
4	
5	

PROJECT CHANGE LOG

Logging

 [Download entire logging record to Microsoft Excel \(CSV\)](#)

This module lists all changes made to this project, including data exports, data changes, and the creation or deletion of users.

Filter by event: ▼
Filter by user name: ▼
Filter by record: ▼
Displaying events (by most recent): ▼

Time / Date	Username	Action	List of Data Changes OR Fields Exported
04/26/2015 2:38pm	jahoitenga	Created Record 2	visit_date = '2015-04-27', daily_medication_list = 'Tylenol', email_address = 'wcteachout@cmh.edu', county(3) = checked, diabetes_indicator = '0', diabetes_tf = '0', participant_signature = '16975', signed_consent_form = '16976', demographics_complete = '2', record_id = '2'
04/26/2015 2:38pm	[survey respondent]	Created Response 1	visit_date = '2015-04-26', daily_medication_list = 'None', email_address = 'jahoitenga@cmh.edu', county(1) = checked, diabetes_indicator = '0', diabetes_tf = '0', participant_signature = '16973', signed_consent_form = '16974', record_id = '1', demographics_complete = '2'
04/26/2015 2:37pm	jahoitenga	Manage/Design	Set up survey
04/26/2015 2:36pm	jahoitenga	Manage/Design	Modify project settings
04/26/2015 2:29pm	jahoitenga	Manage/Design	Modify project settings
04/26/2015 1:26pm	jahoitenga	Manage/Design	Modify project settings
04/25/2015 1:47pm	jahoitenga	Manage/Design	Create project field
04/25/2015 1:45pm	jahoitenga	Manage/Design	Reorder project fields
04/25/2015 1:45pm	jahoitenga	Manage/Design	Create project field
04/25/2015 1:23pm	jahoitenga	Manage/Design	Create project field
04/25/2015 1:21pm	jahoitenga	Manage/Design	Create project field
04/25/2015 1:12pm	jahoitenga	Manage/Design	Edit project field

FIELD DATA HISTORY

Ice Cream Survey

Invitation status: 

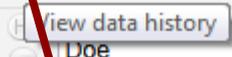
 Survey options 

 Editing existing Record ID 1

Record ID 1
(To rename this record, modify the value immediately below.)

Record ID 

First Name 

Last Name  

Data History for variable "first_name" for record "1"

Listed below is the history of all data entered for the variable "first_name" for Record ID "1". The data history results are sorted from earliest to most recent.

Date/Time of Change	User	Data Changes Made
08/11/2016 1:36pm	jacevedo	Jane
08/11/2016 1:38pm	jacevedo	Susan

Close

DATA EXPORTS, REPORTS, AND STATS

Data Exports, Reports, and Stats

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

 Create New Report

 My Reports & Exports

 PDF & 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	Management Options	Report ID  (auto-generated)
A	All data (all records and fields)	 View Report  Export Data  Stats & Charts		
B	Selected instruments (all records)	 Make custom selections		
	 Create New Report			

DATA EXPORTS, REPORTS, AND STATS

Exporting "All data (all records and fields)"

Select your export settings, which includes the export format (Excel/CSV, SAS, SPSS, R, Stata) and whether or not to perform de-identification on the data set.

Choose export format

<input checked="" type="radio"/>		CSV / Microsoft Excel (raw data)
<input type="radio"/>		CSV / Microsoft Excel (labels)
<input type="radio"/>		SPSS Statistical Software
<input type="radio"/>		SAS Statistical Software
<input type="radio"/>		R Statistical Software
<input type="radio"/>		STATA Statistical Software

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. Text fields other than dates, numbers, etc.)
- 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?](#)

[Deselect all options](#)

Export Data

Cancel

DATA EXPORTS, REPORTS, AND STATS

Name of Report: List of Participants Who Like Chocolate Ice Cream

STEP 1

User Access: Choose who can view this report

All users - OR - Custom user access (Choose specific users, roles, or data access groups who will have access)

STEP 2

Fields to include in report Add all fields from selected instrument: -- choose instrument --

Field	Field Name	Instrument
Field 1	record_id "Study Id"	Instrument: Form 1 Set Up As A Survey
Field 2	mc_dropdown "Multiple Choice (Drop Dow	Instrument: Form 1 Set Up As A Survey
Field 3	-- select a field --	Instrument:

Additional fields to include in report (optional)

Include the survey identifier field and survey timestamp field(s)?

STEP 3 [How to use filters and AND/OR logic](#)

Filters (optional) **Operator / Value**

Filter 1	mc_dropdown "Multiple Choice (Drop Dow	=	Chocolate
AND			
Filter 2	-- select a field --	=	

Switch format: [Use advanced logic](#)

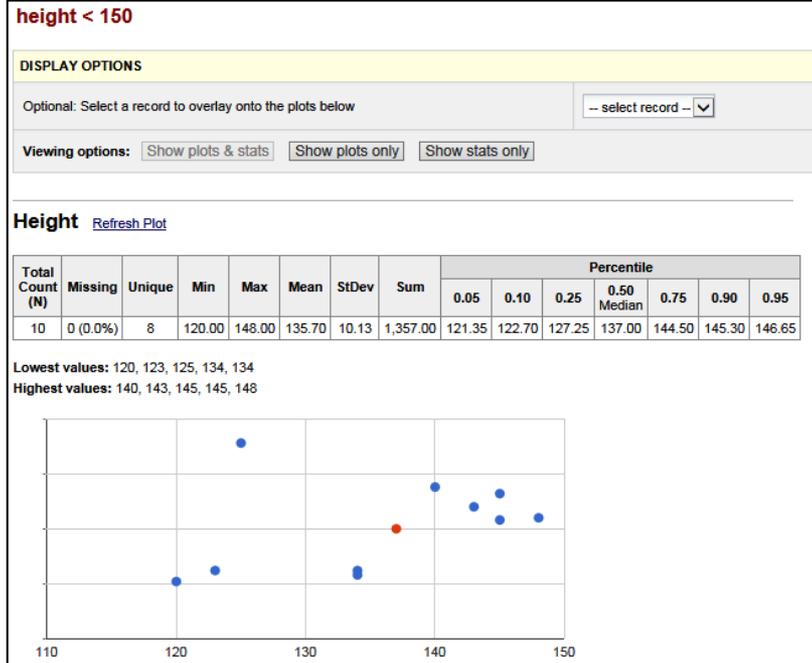
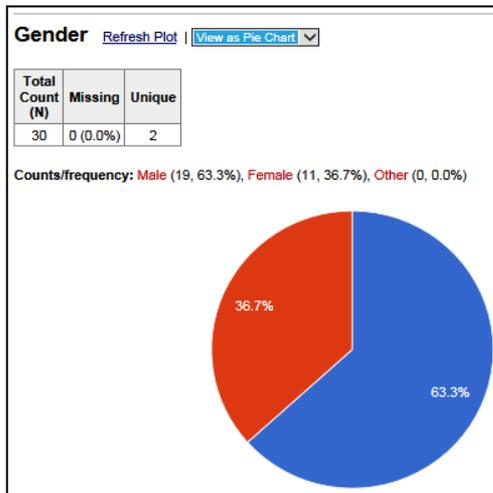
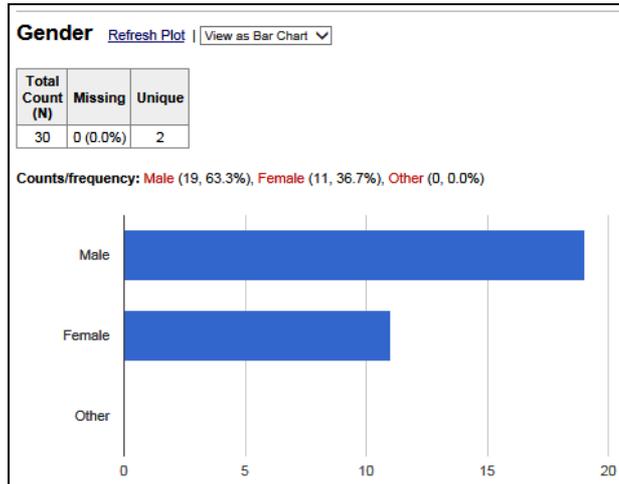
STEP 4

Order the Results (optional)

First by	record_id "Study Id"	Ascending order
Then by	Type variable name or field label	Ascending order
Then by	Type variable name or field label	Ascending order

[Cancel](#)

STATS AND CHARTS



DATA DICTIONARY CODEBOOK

 Print page

Data Dictionary Codebook

#	Variable / Field Name	Field Label <i>Field Note</i>	Field Attributes (Field Type, Validation, Choices, Branching Logic, Calculations, etc.)														
Instrument: Basic Demography Form																	
1	record_id	Study ID	text														
2	first_name	First Name	text, Identifier														
3	last_name	Last Name	text, Identifier														
4	address	Street, City, State, ZIP	notes, Identifier														
5	telephone	Phone number <i>Include Area Code</i>	text (phone), Identifier														
6	email	E-mail	text (email), Identifier														
7	dob	Date of birth	text (date_ymd), Identifier														
8	age	Age (years)	calc Calculation: rounddown(datediff([dob], 'today', 'y'))														
9	ethnicity	Ethnicity	radio <table border="1" data-bbox="1136 761 1391 868"> <tr> <td>0</td> <td>Hispanic or Latino</td> </tr> <tr> <td>1</td> <td>NOT Hispanic or Latino</td> </tr> <tr> <td>2</td> <td>Unknown / Not Reported</td> </tr> </table> Custom alignment: LH	0	Hispanic or Latino	1	NOT Hispanic or Latino	2	Unknown / Not Reported								
0	Hispanic or Latino																
1	NOT Hispanic or Latino																
2	Unknown / Not Reported																
10	race	Race	dropdown <table border="1" data-bbox="1136 951 1532 1202"> <tr> <td>0</td> <td>American Indian/Alaska Native</td> </tr> <tr> <td>1</td> <td>Asian</td> </tr> <tr> <td>2</td> <td>Native Hawaiian or Other Pacific Islander</td> </tr> <tr> <td>3</td> <td>Black or African American</td> </tr> <tr> <td>4</td> <td>White</td> </tr> <tr> <td>5</td> <td>More Than One Race</td> </tr> <tr> <td>6</td> <td>Unknown / Not Reported</td> </tr> </table>	0	American Indian/Alaska Native	1	Asian	2	Native Hawaiian or Other Pacific Islander	3	Black or African American	4	White	5	More Than One Race	6	Unknown / Not Reported
0	American Indian/Alaska Native																
1	Asian																
2	Native Hawaiian or Other Pacific Islander																
3	Black or African American																
4	White																
5	More Than One Race																
6	Unknown / Not Reported																

FILE REPOSITORY

File Repository

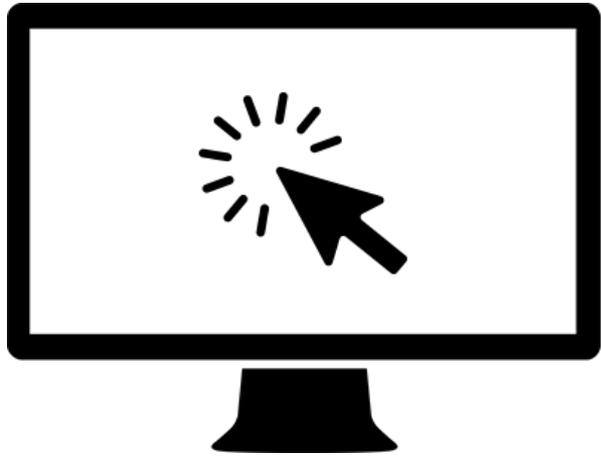
This page may be used for storing and retrieving files and documents used for this project. You may upload files here to save for retrieval later, or you may download previously uploaded files in the file list below. Whenever a data export is performed, the resulting data and syntax files are stored here also.

 **User Files**

 **Data Export Files**

 **Upload New File**

Filter by file type: <input type="text" value="ALL"/>		Action
 IRB Protocol current File name: IRB49857479_Protocol.docx Date uploaded: 07/27/2010 File size: 9.7 KB	  	
 Consent Form File name: Consent_Form_IRB49857479.docx Date uploaded: 07/27/2010 File size: 9.7 KB	  	



Live Demo



Questions

▶ HELP RESOURCES

Blue Button

 Contact REDCap administrator

Help Tab

 Home My Projects Create New Project Training Resources **Help & FAQ** Send-It

Email

- redcap@rt.cri.uchicago.edu

Website

- <https://cri.uchicago.edu/redcap>



CENTER FOR
RESEARCH
INFORMATICS

Thank you!