

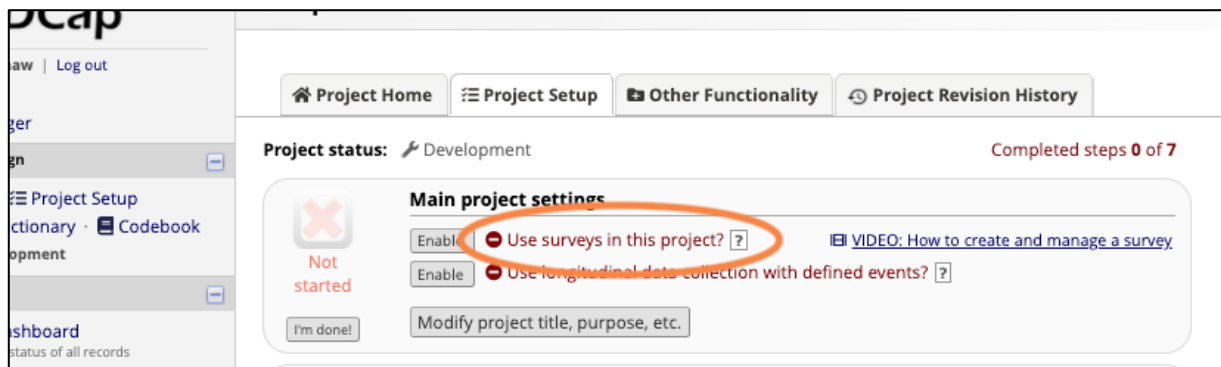
Quick Guide to Using REDCap for Basic Surveys

REDCap (Research Electronic Data Capture) is a robust platform developed to support the collection of clinical research data. The built-in survey functionality may be used to meet most survey needs, without the limitations of a free SurveyMonkey account.

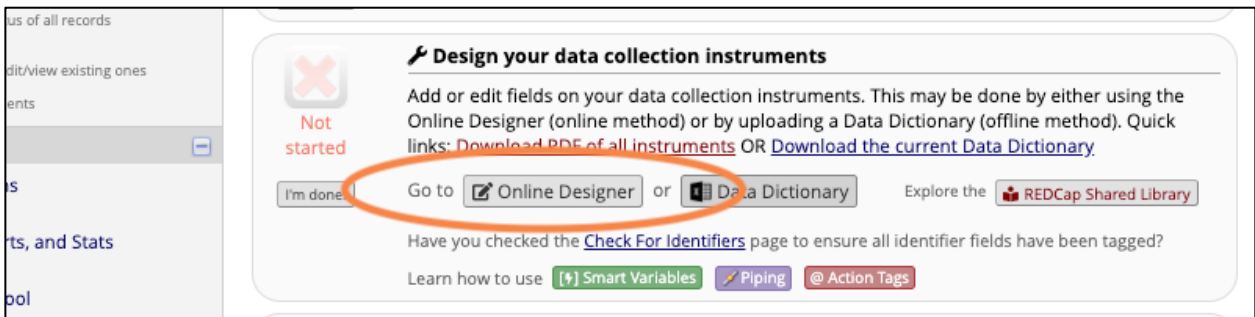
All Upstate personnel and students have access to REDCap – login at <https://redcap.upstate.edu/> using your email username and password.

Simple survey

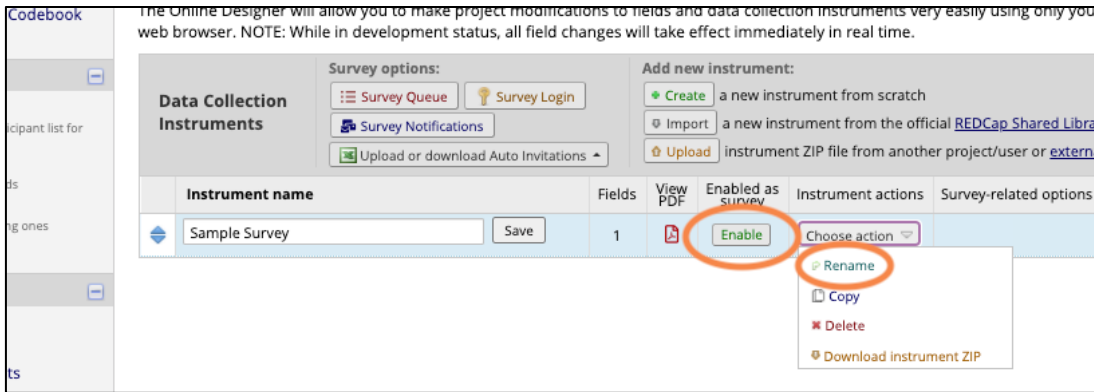
1. Log in and select “+ New Project” at the top pf the page.
2. Give your project a title and select the purpose of the project/survey. Do not change anything else on the page. Click the Create Survey button.
3. In the “Main project settings” box, use the button to enable surveys in the project. This enables surveys for the entire project, should you be using more than one (which is an advanced feature).



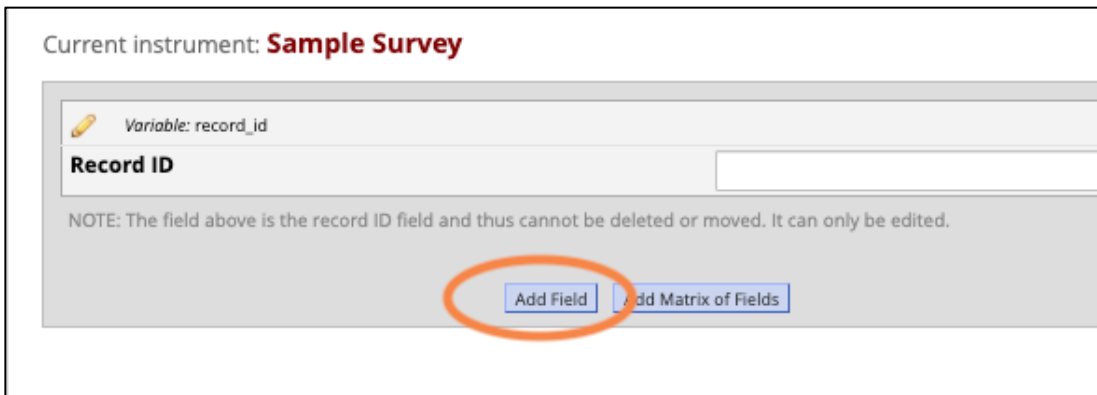
4. In the “Design your data collection.....” box, open Online Designer home page to build the survey content.



- Rename your survey after selecting “Rename” from the drop-down, and click the “Enable” button to enable this collection instrument as a survey. Click the green “Save Changes” button at the top of the window when the survey settings open – these will be set later.



- Click on the new survey name to open the Online Designer window to add fields.
- Leave the Record ID field where it is, this field is visible only in edit mode and will auto-number records as responses come in. Click “Add Field” button to add questions, sections, or descriptive text.



8. Select the field type needed from the drop-down.

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)

9. Add the question and choices. Assign a variable name.

Add New Field

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

Field Label Use the Rich Text Editor ?

What is your favorite dessert? ← Question text

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

- 1, Cake
- 2, Creme Brulee
- 3, Custard
- 4, Ice Cream
- 5, Other

Variable Name (utilized in logs, calcs, and exports)
favorite_dessert Enable auto naming of variable based upon its Field Label?

ONLY letters, numbers, and underscores

How to use [Smart Variables](#) [Piping](#)

Required?* No Yes
* 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

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

10. To add a field for “Other” that shows up when option is selected, add question with a text field as usual, then use the branching logic functionality.

Variable: favorite_dessert

What is your favorite dessert?

* must provide value

Cake

Creme Brulee

Custard

Ice Cream

Other

Add Field Add Matrix of Fields

Variable: other_fav

Other favorite dessert:

* must provide value

Add Field Add Matrix of Fields

In the branching logic window, use Drag-N-Drop to find the “Other” option in the field that you are working with and drag it to the right. Note: If you change the order or the choices that trigger the branching (so that “other” has a different raw value - in this case the raw value is 5), you will also need to make that change in the branching logic.

— OR —

Drag-N-Drop Logic Builder

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

- record_id = (define criteria)
- favorite_dessert = Cake (6)
- favorite_dessert = Creme Brulee (2)
- favorite_dessert = Custard (3)
- favorite_dessert = Ice Cream (4)
- favorite_dessert = Other (5)
- email = (define criteria)
- sample_survey_complete = Incomplete (0)
- sample_survey_complete = Unspecified (4)

Drag and Drop

Show the field ONLY if...

ALL below are true

ANY below are true

favorite_dessert = Other (5) X

[Clear logic](#)

Save Cancel

Optionally, the “Other” response box may be embedded with the question choices. Follow the same process above, but enter the variable name for “other_fav” after “Other” in the corresponding choices surrounded by curly brackets {}. Note that the field with the text box now has a message that it is embedded elsewhere on the page.

Variable: favorite_dessert How to embed a field elsewhere

What is your favorite dessert?

Cake
 Pie
 Cookies
 Ice Cream
 Other {other_fav}

reset

Variable: other_fav Branching logic: [favorite_dessert] = '5' Field is embedded elsewhere on page 1

Other favorite dessert

* must provide value

11. Any field/question can be required. A red asterisk will appear on the question when it is required. To turn off this feature, go to Survey Settings.

Variable Name (utilized in logic, calcs, and exports)

email Enable auto naming of variable based upon its Field Label?
ONLY letters, numbers, and underscores

How to use Smart Variables Piping

Validation? (optional) ---- None ----

– or –

-- select ontology service --

Required?* No Yes
* 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

12. Validation may be set up for short answer text.

The screenshot shows a configuration form for a variable named 'email'. The 'Validation?' section is active, and a dropdown menu is open, listing various validation options. The 'None' option is selected. The options in the dropdown are: 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, Number, Phone (North America), Time (HH:MM), and Zipcode (U.S.).

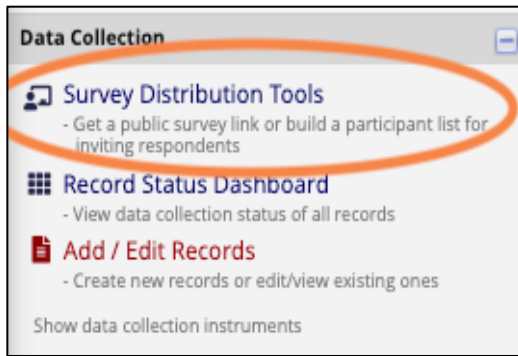
13. If personally identifiable information is collected, it can be coded as such so that it can be excluded from data exports and reports, and access to the data by project users may be limited.

The screenshot shows the same configuration form for the 'email' variable. The 'Identifier?' checkbox is checked, and the 'Required?' checkbox is also checked. The 'Validation?' dropdown is set to 'Email'. The 'Identifier?' checkbox is circled in orange.

14. Go to survey settings. There are a LOT of survey options. It is recommended to at least enter *survey instructions*, change the *colors/design* to your liking, and enter a *survey completion message*. Save those changes when done.

The screenshot shows a navigation bar with two buttons: 'Return to list of instrument' and 'Survey settings'. The 'Survey settings' button is circled in orange. Below the buttons, it says 'Current instrument: Sample Survey'.


15. Obtain the survey URL by going to the Survey Distribution area on the left-hand menu.



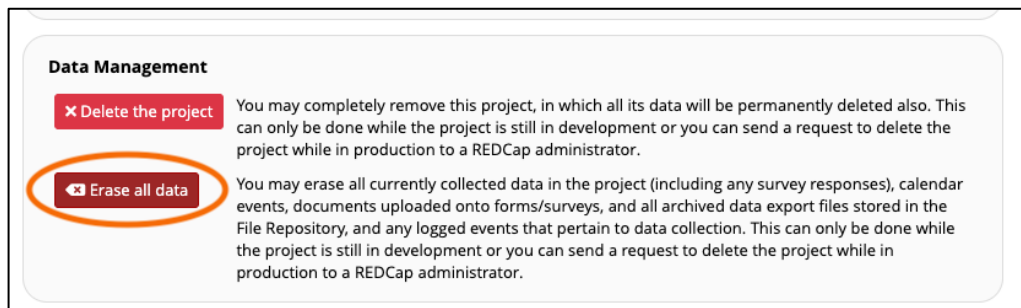
This URL may be used while developing the survey by reloading this screen after making changes in REDCap.

15. The URL shown may be copied and pasted into an email, used on a web site, etc.. Because all respondents will use the same URL, it is not possible to track who has and has not completed the survey – this functionality requires the use of a Participant List (not covered in this document). A short URL may be created, but keep in mind that it may be used *ONLY ONCE*.

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.

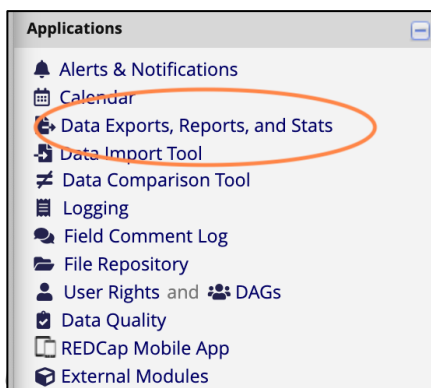
Public Survey URL: 

16. Test the survey by filling it out and submitting it until you have tested all questions and branching logic. When ready, erase the test data in the "Other Functionality" tab.



17. Move the project to production at the bottom of the Project Setup page. Subsequent changes made to the project will be reviewed by an administrator as an added layer of protection for data integrity.

18. After data are collected, go to Data Export, Reports, and Stats to work with them.



My Reports & Exports			
	Report name	View/Export Options	Manager
A	All data (all records and fields)	View Report Export Data Stats & Charts	

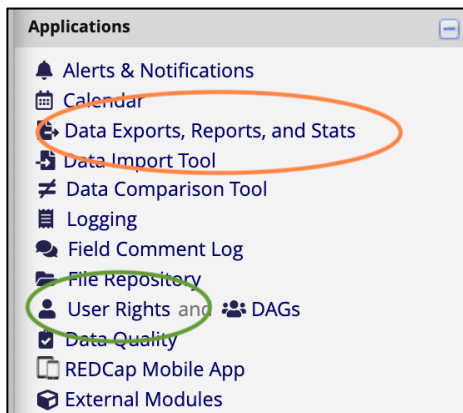
- View Report displays a list of records within REDCap
- Export data provides options for exporting to various file formats
- Stats & Charts will automatically create simple charts where possible

When exporting a .csv file, select the “CSV / Microsoft Excel (labels) option for most purposes.

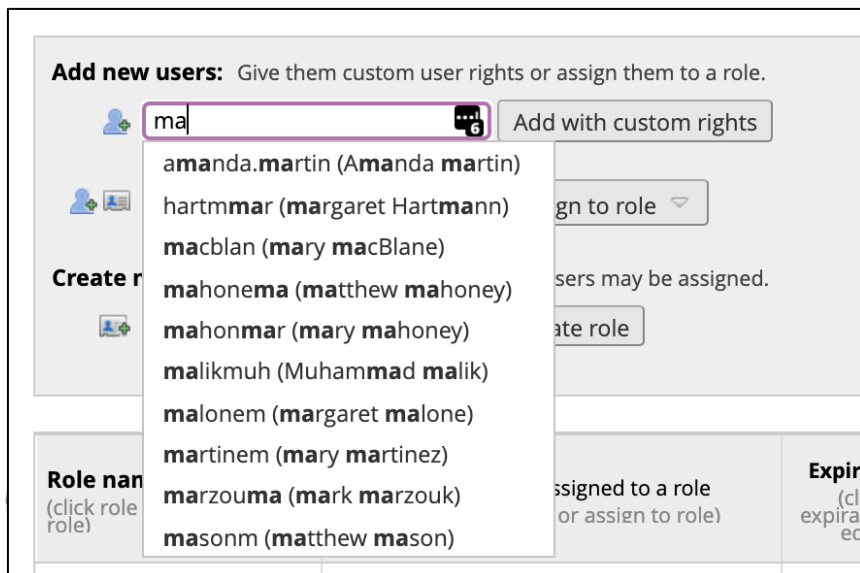
Custom reports may be created in the “Create New Report” tab.

19. Sharing a project with others for survey administration or data analysis:

Go to User Rights on the left menu.



Under Add new users, select the person from the list (they must have logged into REDCap at least once to show up on the list), and assign the levels of access you would like them to have in the window that opens. The project will then be visible in their REDCap account when they log in.



Don't forget to scroll down to see all options for permissions.

Editing existing user "ackermaw"

You may set the rights for the user below by checking the boxes next to the application tools to which you wish to grant them access. You may also grant them or deny them access to individual data collection instruments, if so desired. To save your selections, click the "Save Changes" button at the bottom of the page.

Editing existing user "ackermaw"

Basic Rights

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

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/Organize Reports
Also allows user to view ALL reports (but not necessarily all data in the reports)
- Stats & Charts

Other privileges:

- Survey Distribution Tools
- Calendar
- Data Import Tool

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
Dessert Preferences - sample survey (survey)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

External Modules: Configuration Permissions

Privileges may be defined regarding whether the user can set or modify the configuration of an External Module that has been enabled on this project. Below are the currently enabled modules. NOTE: Only administrators may modify the module configuration permissions here.

- Date Calculated Fields*
- Pre-populate instruments*

*Permissions based on user's Project Design/Setup rights