**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 tile 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).
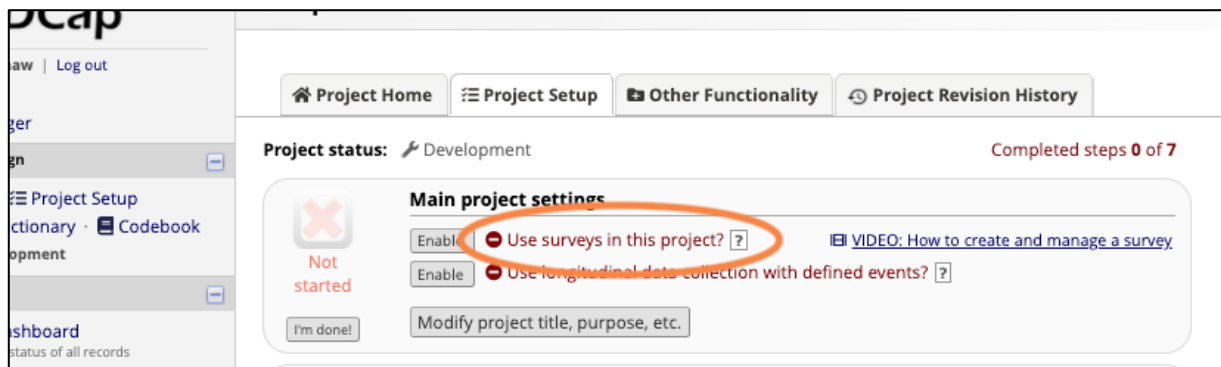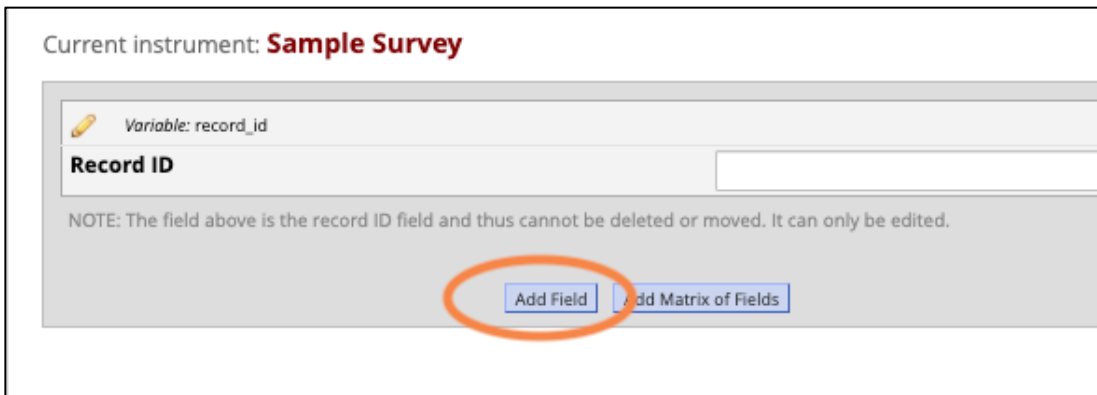

4. In the "Design your data collection….." box, open Online Designer home page to build the survey content.
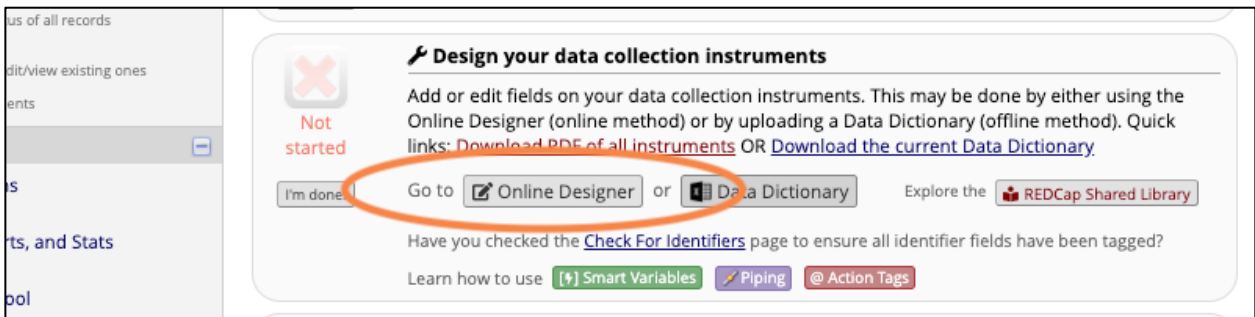
5. Rename your survey after selecting "Rename" from the drop-down, and click the "Enable" button to enable this collection instrument as a survey. Click the green "Save Changes" button at the top of the window when the survey settings open – these will be set later.
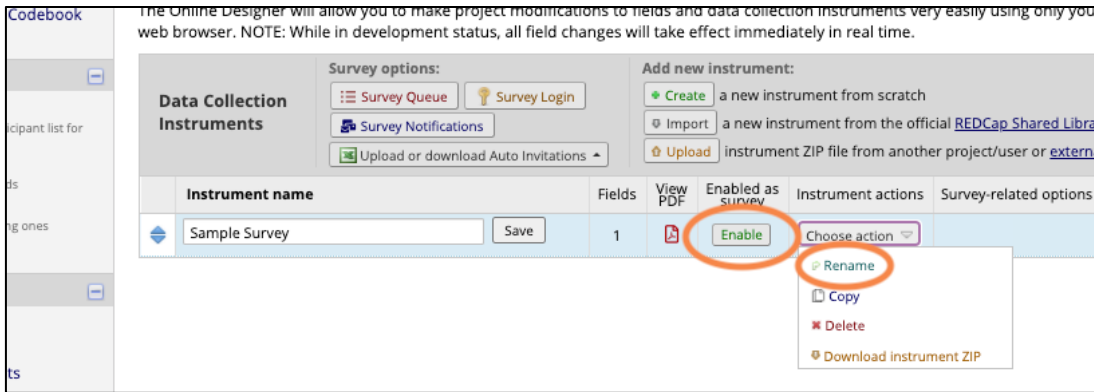
6. Click on the new survey name to open the Online Designer window to add fields.

7. 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.

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

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.

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.

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.

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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.

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

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.

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.

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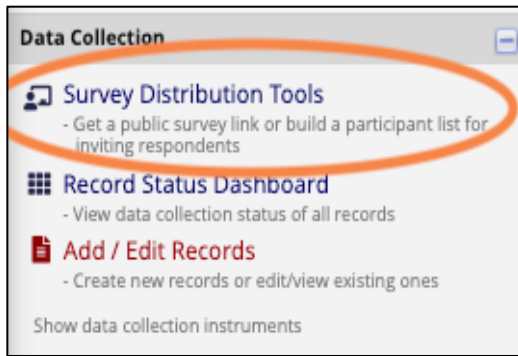

This URL may be used while developing the survey by reloading this screen after making changes in REDCap.

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 m*ay be used ONLY ONCE.*


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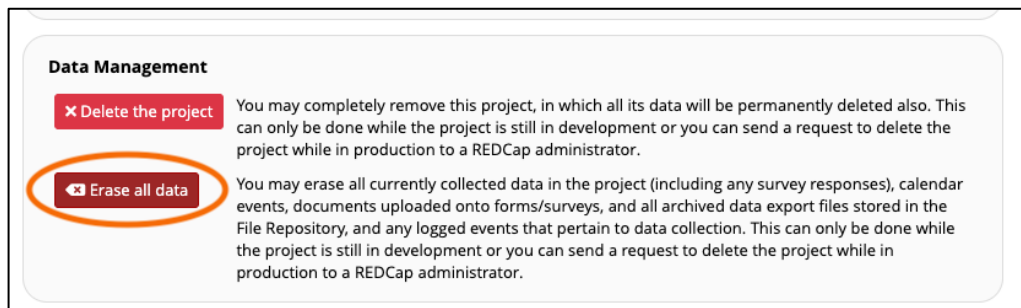
17. Move the project to production at the bottom of the Project Setup page. Subsequent changes made to the project will be reviewed by an administrator as an added layer of protection for data integrity.

18. After data are collected, go to Data Export, Reports, and Stats to work with them.
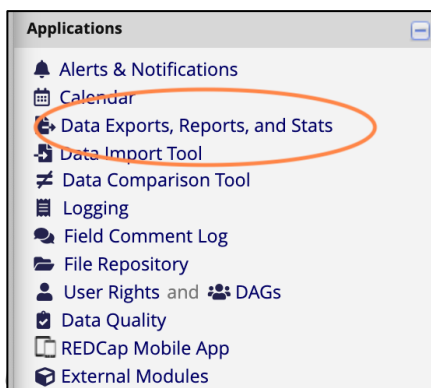
|		Report name	View/Export Options	Manager
	A	**All data** (all records and fields)	🔍 View Report 📥 Export Data 📊 Stats & Charts	

My Reports & Exports

- 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.
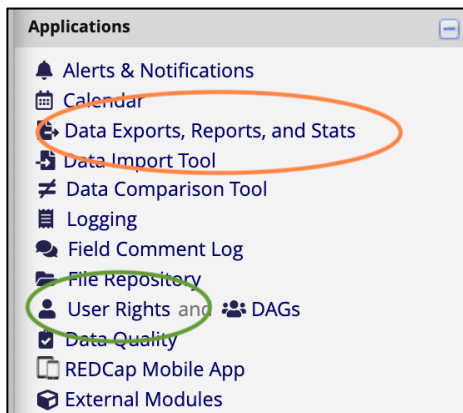
Under Add new users, select the person from the list (they must have logged into REDCap at least once to show up on the list), and assign the levels of access you would like them to have in the window that opens. The project will then be visible in their REDCap account when they log in.
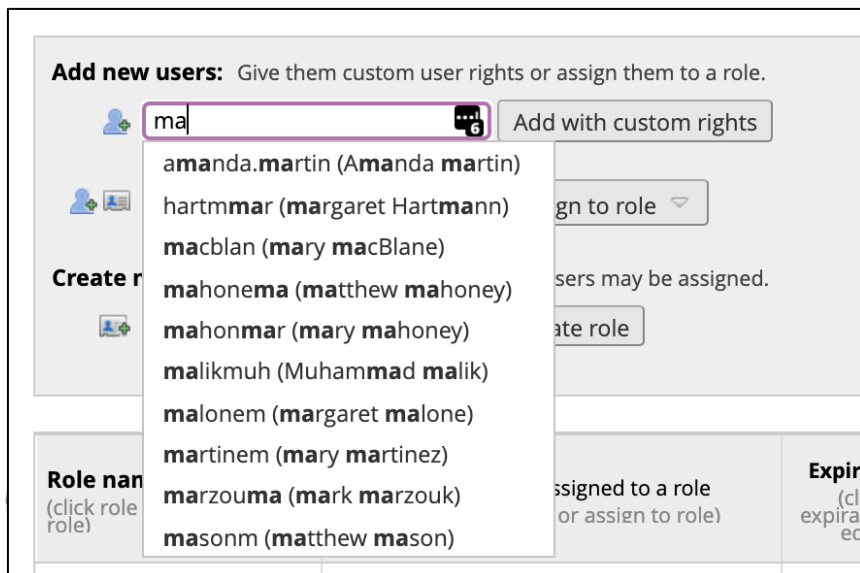
Don't forget to scroll down to see all options for permissions.