

# Creating Surveys Using



Listed below are the REDCap projects to which you currently have access. Click the project title to open the project. Newly created projects begin in **Development status** as you begin to build and design them. When you are ready to begin entering real data in the project, you may move it to **Production status** to designate the project as officially collecting data. When you are finished collecting data or if you wish to stop collection, the project may be set to **Inactive status**, although it may be brought back to Production status at any time when you are ready to begin collecting data again. Also listed is the project type, which designates if the project contains **surveys**, **data entry forms**, or **both**.

## My Projects

Generations Project Data Dictionary Copy  
Generations Project Data Dictionary Copy 2-23-2011  
Webinar Test Database  
Case Management Mock Up  
File Upload Test  
Generations Project FINAL  
(drafted changes are in review)

1. Log into REDCap and select the "Create New Project" Tab

2. Give project a title and define its purpose

3. Select if you want the to be a survey, data entry, or a combo of both

4. Is it longitudinal or a one time event?

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

### Create a new REDCap Project

You may begin the creation of a new REDCap project on your own by completing the form below and clicking the Create Project button at the bottom.

**Project title:**   
Title to be displayed on project webpage

**Purpose of this project:** *(How will it be used?)*

**Design your project:**

**STEP 1: Choose the type of project you want to build** [Tell me more](#)

- Single Survey
- Data Entry Forms (e.g. traditional database)
- Single Survey + Data Entry Forms (e.g. pre-screening survey with follow-up data capture)

**STEP 2: Choose collection format for data entry forms** [Tell me more](#)

- Classic** (each form available for use once for each subject/record)
- Longitudinal / repeating forms** (each form available for use one or more times for each subject/record)
  - Enable the scheduling module? [Tell me more](#)

# Select the Online Designer

The screenshot displays a web application interface with a left-hand navigation menu and a main content area. The navigation menu includes sections for 'My Projects', 'Data Collection', 'Applications', and 'Help & Information'. The main content area shows the project status as 'Development' and provides instructions for modifying project settings and designing data collection instruments. A red circle highlights the 'Online Designer' button in the 'Design your data collection instruments' section.

**Navigation Menu:**

- My Projects
- Project Home
- Project Setup
- Project status: **Development**
- Data Collection
  - Demographics
- Applications
  - Calendar
  - Data Export Tool
  - Data Import Tool
  - Data Comparison Tool
  - Logging
  - File Repository
  - User Rights
  - Graphical Data View & Stats
  - Report Builder
- Help & Information
  - Help & FAQ
  - Video Tutorials
  - Suggest a New Feature

**Main Content Area:**

Project Home | Project Setup | Other Functionality

Project status: Development

**Modify project settings or make customizations**

Not started

You have created your project and are ready to begin building on it. If you would like to modify project settings that you set when creating the project or if you wish to make some customizations (e.g. enable auto-numbering for new records), use the buttons below.

I'm done! Go to  or

**Design your data collection instruments**

In progress

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 use either method or both. Quick links: [Download PDF of all data collection instruments](#) OR [Download Data Dictionary](#)

I'm done! Go to  or

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

**User Rights and Permissions**

1. Hit "Create a new instrument from scratch"

[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. Below you have the options to select an existing form to edit, to delete a form, to create a new form, and to reorder your forms as they are displayed. NOTE: While in development status, all field changes will take effect immediately in real time.

**Data Collection Instruments**

Add new instrument:  new instrument from scratch  
 a new instrument from the REDCap Shared Library

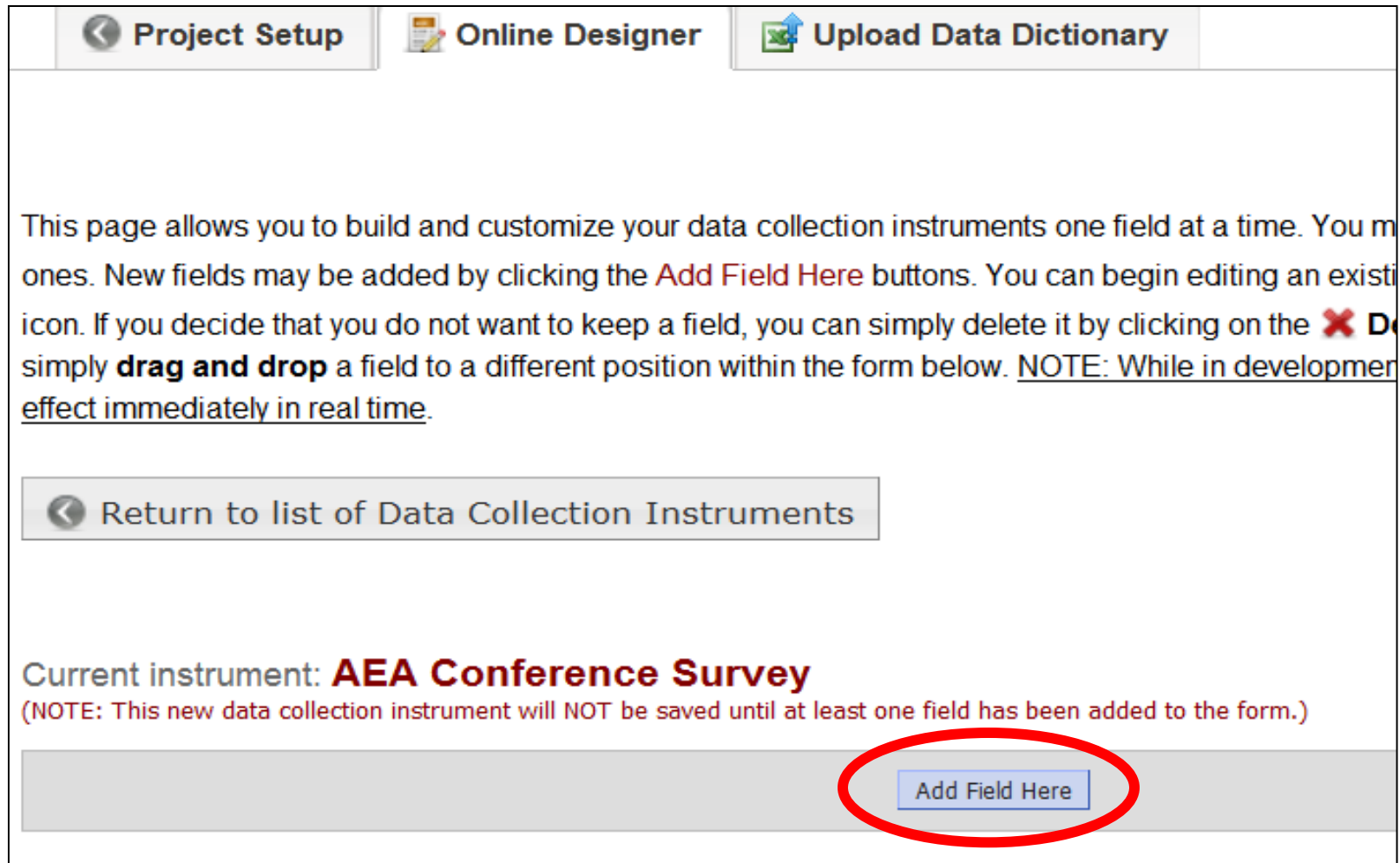
Instrument name	Fields	Actions
<a href="#">Demographics</a>	7	<input type="button" value="Rename"/> <input type="button" value="Delete"/>

New instrument name:

2. Give your instrument at name and hit "Create"

Your instrument has now been created, but there are no questions or items in it. Adding a field is a three-step process. Let's create a new field now.

### 1. Hit the "Add Field Here"



The screenshot shows a web interface with a navigation bar at the top containing three tabs: 'Project Setup', 'Online Designer', and 'Upload Data Dictionary'. The 'Online Designer' tab is active. Below the navigation bar, there is a text area with instructions: 'This page allows you to build and customize your data collection instruments one field at a time. You may add or delete fields. New fields may be added by clicking the **Add Field Here** buttons. You can begin editing an existing field by clicking on the **✖** Delete icon. If you decide that you do not want to keep a field, you can simply delete it by clicking on the **✖** Delete icon. You can also simply **drag and drop** a field to a different position within the form below. NOTE: While in development mode, changes take effect immediately in real time.' Below the text area is a button with a left arrow icon and the text 'Return to list of Data Collection Instruments'. At the bottom of the page, there is a section titled 'Current instrument: **AEA Conference Survey**' with a note in parentheses: '(NOTE: This new data collection instrument will NOT be saved until at least one field has been added to the form.)'. At the very bottom, there is a grey bar containing a blue button with the text 'Add Field Here', which is circled in red.

Project Setup Online Designer Upload Data Dictionary

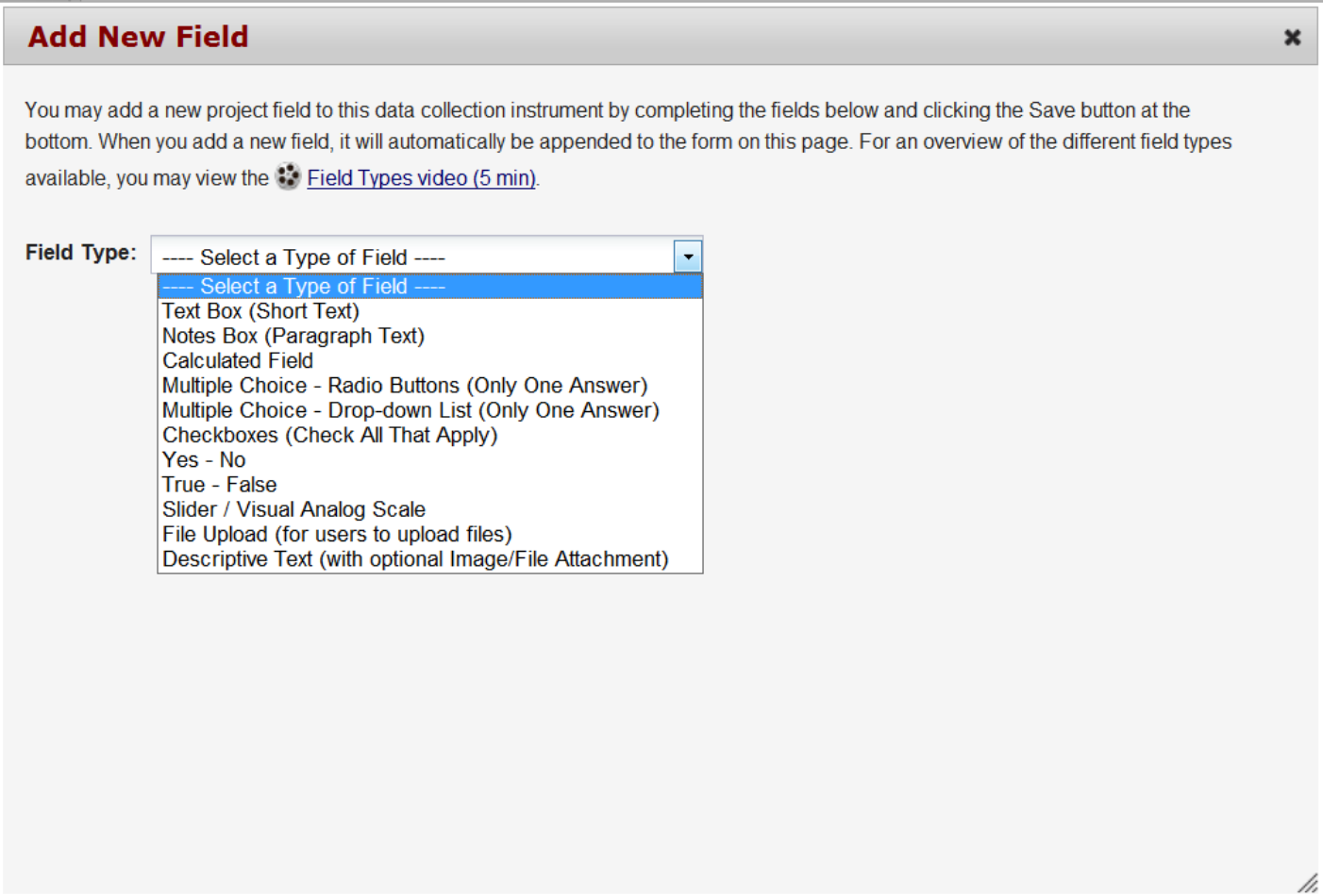
This page allows you to build and customize your data collection instruments one field at a time. You may add or delete fields. New fields may be added by clicking the **Add Field Here** buttons. You can begin editing an existing field by clicking on the **✖** Delete icon. If you decide that you do not want to keep a field, you can simply delete it by clicking on the **✖** Delete icon. You can also simply **drag and drop** a field to a different position within the form below. NOTE: While in development mode, changes take effect immediately in real time.

Return to list of Data Collection Instruments


Current instrument: **AEA Conference Survey**  
(NOTE: This new data collection instrument will NOT be saved until at least one field has been added to the form.)

Add Field Here

2. Select the type of field you want your item to be. You have a variety of options. Let's start with a simple "Multiple Choice (One Answer Only)" field. This type of field is great for items with Likert Scales.



**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 automatically be appended to the form on this page. For an overview of the different field types available, you may view the  [Field Types video \(5 min\)](#).

Field Type:

- Select a Type of Field ----
- Text Box (Short Text)
- Notes Box (Paragraph Text)
- Calculated Field
- Multiple Choice - Radio Buttons (Only One Answer)
- Multiple Choice - Drop-down List (Only One Answer)
- Checkboxes (Check All That Apply)
- Yes - No
- True - False
- Slider / Visual Analog Scale
- File Upload (for users to upload files)
- Descriptive Text (with optional Image/File Attachment)

### 3. Populate the field with all need information.

#### 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 automatically be appended to the form on this page. For an overview of the different field types available, you may view the [Field Types video \(5 min\)](#).

**Field Type:**

**Field Label**

How satisfied are you with the sessions at the AEA conference?

**Choices (one choice per line)**

1, Very Dissatisfied  
2, Dissatisfied  
3, Satisfied  
4, Very Satisfied

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


**Variable Name** (utilized during data export)  
  
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**   
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**

The "Field Label" is the specific survey question.

The "Variable Name" must be lowercase with no spaces.

The "Choices" Section will populate your Likert Scale. Adding a number will code your data for analysis

Now you have a start to creating a survey in REDCap. This is what the question looks like now.

Current instrument: **AEA Conference Survey** Preview instrument

Add Field Here

Variable: session\_sat

**How satisfied are you with the sessions at the AEA conference?**

- Very Dissatisfied
- Dissatisfied
- Satisfied
- Very Satisfied

reset value


Add Field Here

Adding more fields is just as easy. Just hit the “Add Field Here” button and start the process again.



# Another Example of Adding a Question to the Survey

## 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 automatically be appended to the form on this page. For an overview of the different field types available, you may view the  [Field Types video \(5 min\)](#).

**Field Type:**

**Field Label**

Overall, how satisfied are you with the AEA conference?

**Choices (one choice per line)**

1, Very Dissatisfied  
2, Dissatisfied  
3, Satisfied  
4, Very Satisfied

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


**Variable Name** (utilized during data export)  
  
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**   
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.

# What the Survey Looks Like Now

Current instrument: **AEA Conference Survey** Preview instrument

Add Field Here





    Variable: session\_sat

**How satisfied are you with the sessions at the AEA conference?**

Very Dissatisfied  
 Dissatisfied  
 Satisfied  
 Very Satisfied

reset value

Add Field Here

    Variable: overall\_sat

**Overall, how satisfied are you with the AEA conference?**

Very Dissatisfied  
 Dissatisfied  
 Satisfied  
 Very Satisfied


reset value

Add Field Here

Let's add one more field and choose a new field type.

The New Field is “Notes Box” which will allow for the entry of qualitative data.

### 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 automatically be appended to the form on this page. For an overview of the different field types available, you may view the  [Field Types video \(5 min\)](#).

**Field Type** Notes Box (Paragraph Text) ▾

**Field Label**

Please leave any comments you would like to make about this year's AEA conference.

**Variable Name** (utilized during data export)

aea\_comments

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**

# What the Survey Looks Like Now

Current instrument: **AEA Conference Survey** Preview instrument

Add Field Here





    Variable: session\_sat

**How satisfied are you with the sessions at the AEA conference?**

- Very Dissatisfied
- Dissatisfied
- Satisfied
- Very Satisfied

reset value

Add Field Here





    Variable: overall\_sat

**Overall, how satisfied are you with the AEA conference?**

- Very Dissatisfied
- Dissatisfied
- Satisfied
- Very Satisfied

reset value

Add Field Here

    Variable: aea\_comments

**Please leave any comments you would like to make about this year's AEA conference.**

Expand

Add Field Here


# Data entry is simple in REDCap. Three-step process.

1. Select the survey form you want to work with along the left pane.

The screenshot displays the REDCap interface. On the left, the 'Data Collection' pane is visible, with 'AEA Conference Survey' highlighted in a red circle. An arrow points from this selection to the main content area. The main area shows a text box for 'Enter a new or existing Study ID' containing the text 'JB-123', which is also circled in red. An arrow points from this text box to a callout box at the bottom right. The interface also shows 'Total records: 1' and sections for 'Incomplete Records (1)' and 'Complete Records (0)', each with a dropdown menu.

2. Give the participant a unique identifier. This step is required as it serves as the basis for all data for specific individuals at the individual-level.

### 3. Complete the survey.

 Editing existing Study ID **JB-123**

<b>Study ID</b>	JB-123
<b>How satisfied are you with the sessions at the AEA conference?</b>	<input type="radio"/> Very Dissatisfied <input type="radio"/> Dissatisfied <input checked="" type="radio"/> Satisfied <input type="radio"/> Very Satisfied <a href="#">reset value</a>
<b>Overall, how satisfied are you with the AEA conference?</b>	<input type="radio"/> Very Dissatisfied <input type="radio"/> Dissatisfied <input type="radio"/> Satisfied <input checked="" type="radio"/> Very Satisfied <a href="#">reset value</a>
<b>Please leave any comments you would like to make about this year's AEA conference.</b>	<div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;">The REDCap session was excellent. Give that guy a raise!</div> <a href="#">Expand</a>
<b>Form Status</b>	
<b>Complete?</b>	<input type="radio"/> Complete <input type="button" value="v"/> <input type="button" value="Save Record"/> <input type="button" value="Save and Continue"/> <input type="button" value="-- Cancel --"/>

# Report Building Tool

## Report Builder

You may use this page to build and save custom reports, which will query the project in real time and display the resulting data in a table format. Once created, you may view your reports at any time as well as modify or even delete them. Your saved reports be displayed on the right-hand menu as links, which can be clicked to display the report.

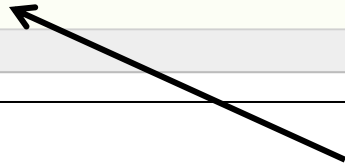
### Edit Existing Report

You may edit an existing report by changing any of the fields below or by selecting new fields/variables that you want to include in the report. You may add as many new fields to your report as you wish. When you have completed making the changes, click the Save Changes button at the bottom.

<b>Name of Report:</b>	<input type="text" value="Satisfaciton Report"/>	
	<b>Field Name / Label</b>	<b>Limiters (optional) Operator / Value</b>
<b>Field 1</b>	<input type="text" value="study_id (Study ID)"/>	<input type="text"/> <input type="text"/>
<b>Field 2</b>	<input type="text" value="overall_sat (Overall, how satisfied a...)"/>	<input type="text"/> <input type="text"/>
<b>Field 3</b>	<input type="text" value="session_sat (How satisfied are you wi...)"/>	<input type="text"/> <input type="text"/>
<b>Field 4</b>	<input type="text"/>	<input type="text"/> <input type="text"/>
<b>Order the Results (optional)</b>		
<b>First by</b>	<input type="text"/>	Ascending order <input type="text"/>
<b>Then by</b>	<input type="text"/>	Ascending order <input type="text"/>

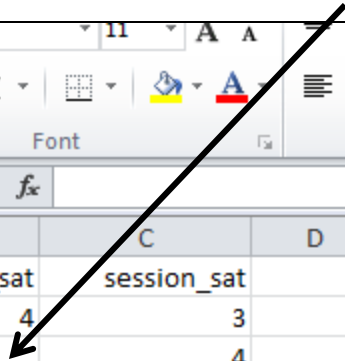
Number of results returned: 4  
 Total number of records queried: 4

Satisfaciton Report		
Study ID (study_id)	Overall, how satisfied are you with the AEA conference? (overall_sat)	How satisfied are you with the sessions at the AEA conference? (session_sat)
<a href="#">JB-123</a>	Very Satisfied (4)	Satisfied (3)
<a href="#">RT-356</a>	Dissatisfied (2)	Dissatisfied (2)
<a href="#">MH-453</a>		Very Satisfied (4)
<a href="#">SW-899</a>	Satisfied (3)	Satisfied (3)



The report tool gives you instant information about what's in your database. It's easy to spot missing data and is exportable to Excel, SPSS, SAS, etc.

Microsoft Excel Ribbon: Clipboard, Font, Alignment, Number										
	A	B	C	D	E	F	G	H	I	J
1	study_id	overall_sat	session_sat							
2	JB-123	4	3							
3	MH-453		4							
4	RT-356	2	2							
5	SW-899	3	3							
6										
7										





# For More Information on **REDCap** Research Electronic Data Capture

Please visit <http://www.project-redcap.org/>

- System requirements
- Video tutorials
- List of current consortium partners
- Information on becoming a consortium partner