

This guide covers:

- Setting-up a survey
- Adding different question types to a survey
- An introduction to basic branching logic

The screenshot shows the REDCap interface for a project named 'Sandbox' (PID 5983). The 'Project Setup' tab is highlighted with an orange box. The dashboard displays the following information:

The tables below provide general dashboard information, such as a list of all users with access to this project, general project statistics, and upcoming calendar events (if any).

Current Users (1)	
User	Expires
[Redacted]	never

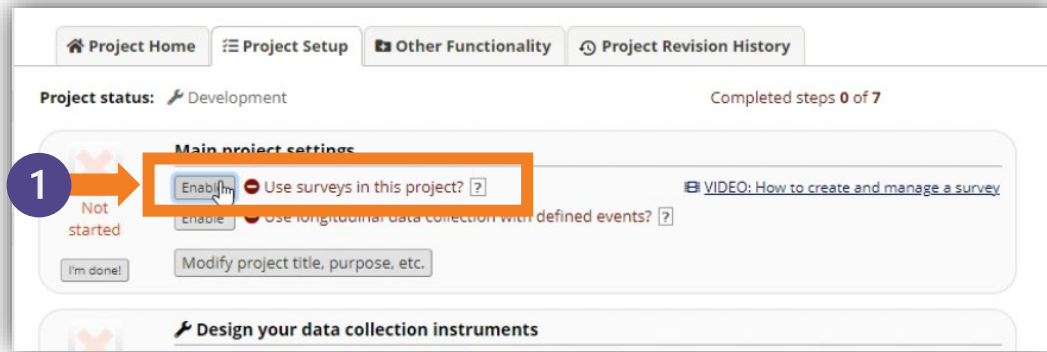
Project Statistics	
Records in project	0
Most recent activity	10/18/2021 11:24am
Space usage for docs	0.00 MB

Upcoming Calendar Events (next 7 days)		
Time	Date	Description
		No upcoming events

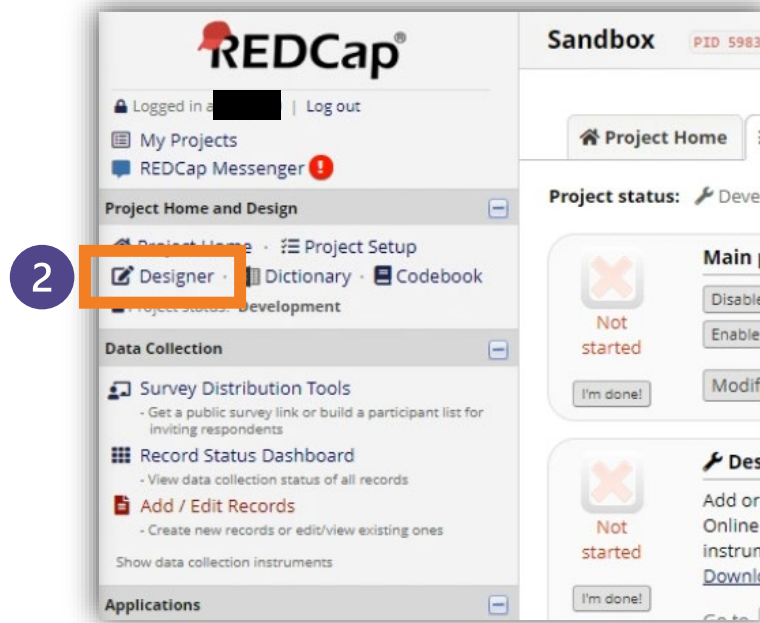
If you want to send individualized URL's to participants after building your survey, please see our separate guide.

To begin, go to the project set-up tab





In the 'main project settings' (top box) click enable next to 'use surveys in this project'. A checkmark will appear and the text will turn green.



Next, in the left side bar, go to the designer screen.



The screenshot shows the REDCap Online Designer interface for a project named 'Sandbox' (PID 5983). The left sidebar contains navigation menus for 'Project Home and Design', 'Data Collection', and 'Applications'. The main content area is titled 'Data Collection Instruments' and includes options to 'Add new instrument' (Create, Import, Upload), 'Survey options' (Survey Queue, Survey Login, Survey Notifications), and 'Automated Survey Invitation options' (Upload or download Auto Invitations, Re-evaluate Auto Invitations). Below these options is a table of instruments:

Instrument name	Fields	View PD	Enabled as survey	Instrument actions	Survey-related options
My First Instrument	1		Enable	Choose action	

An orange box highlights the 'Enable' button in the 'Enabled as survey' column for the instrument 'My First Instrument'. Below the table, there is a '[No Title]' placeholder.

A generic placeholder title will populate the 'Instrument name' field. Click 'enable' under 'Enabled as Survey'.



Project Home Project Setup Online Designer + Set Up My Survey

You may utilize any data collection instrument as a survey by enabling the instrument on this page. Data may still be collected on the instrument via normal data entry on the form, but enabling it as a survey allows for the additional option of collecting data via survey by respondents.

+ Set up my survey for data collection instrument "Survey Title" Save Changes Cancel

Basic Survey Options:

Survey Title
Survey Title
Title to be displayed to participants at the top of the survey page

Survey Instructions
(Displayed at top of survey after title)

Paragraph B I

Please complete the survey below.
Thank you!

[How to use Piping here](#)

Survey Design Options:

Logo
(Optional: display an image above the survey title)
Add new logo: Choose File No file chosen
(Images wider than 600 pixels will be downsized to fit page.)
 If using a logo, hide survey title on survey page?

Use enhanced radio buttons and checkboxes?
(Includes Yes/No and True/False fields)
Standard radios and checkboxes [Show example](#)

Size of survey text
Large

You are now on the survey settings screen

Enter the survey title in the top field. Some common components of the survey instructions field include the purpose of the survey, how long it will take, and what the responses will be used for.



1

Survey Design Options:

Logo
(Optional: display an image above the survey title)

Add new logo:
 No file chosen
 (Images wider than 600 pixels will be downsized to fit page.)
 If using a logo, hide survey title on survey page?

Use enhanced radio buttons and checkboxes?
(Includes Yes/No and True/False fields)

Standard radios and checkboxes

Size of survey text
Large

Font of survey text
Open Sans

Survey theme
Default

Survey design preview (sample survey):

This is the survey title

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

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

In the next section, you can edit some components that impact the “look and feel” of your survey. This includes adding a logo, enhanced buttons, text survey, and font. The ‘plum’ survey theme option is aligned with Northwestern branding. Feinberg and Northwestern Medicine logos are available for download from [Feinberg Communications](#).

2

Survey Customizations:

Question Numbering
Auto numbered

Question Display Format
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)

Allow participants to download a PDF of their responses at end of survey?
No
This option will not be available if the Survey Auto-continue or Survey Queue auto-start option is enabled. Also, if a field utilizes the @HIDDEN action tag, it will not be displayed in the PDF.

Save a PDF of completed survey response to a File Upload field
Disabled
Choose a File Upload field from the drop-down above to enable this feature. Tip: If desired, the field may exist on the survey instrument that is triggering it, in which the field can be hidden on the survey page using the action tag @HIDDEN-SURVEY. Note: This feature cannot be triggered by submitting a data entry form EXCEPT only when a user clicks the 'Save & Mark Survey as Complete' button on the data entry form. Note: If the current survey settings allows participants to return to completed responses, then any existing PDFs that have already been stored in this File Upload field will be overwritten by any new ones if the survey is

Survey-specific email invitation field
Designate an email field for sending survey invitations for **this survey only**.
 -- select a field --
Note: This option will override the project-level email invitation field (if enabled on the Project Setup page) and will also override any email address originally entered into the Participant List. Also, if this field has no value and the project-level email field is enabled, then the project-level email field's value will be used instead.

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

Allow survey respondents to view aggregate survey results after completing the survey?
Disabled
 Additional settings:
 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
Disabled

The “Survey Customizations” section has additional options that impact how you want your survey displayed to your audience. Description text below each option provides guidance.

3

Disregard the “Survey-Specific email invitation field” for public surveys (distributed with a URL). For individualized surveys distributed through email, you will want to select the relevant option.

4

In most cases, the aggregate survey results option is left disabled.



Survey Access:

Response Limit (optional)
 (Maximum number of responses to collect. Prevents respondents from starting the survey after a set number of responses have been collected.) [?]

(e.g., 150) If left blank, the response limit will not be enforced.

Will include

Custom text to display to respondent on survey when limit is reached:

Paragraph **B** *I* [Link](#) **≡** **≡** **≡** **≡** **↶** **↷** **↻**

☰ **☰** **☰** **☰** **☰** **☰** **A** **↻** **↻** **Q** **<>** **I**

Thank you for your interest; however, the survey is closed because the maximum number of responses has been reached.

days hours minutes

If the respondent loads the survey after this time has passed, it will not allow them to begin or continue the survey. (If all are left blank, the time limit will not be enforced.)

Survey Expiration (optional)
 (Time after which the survey will become inactive.) [?]

M/D/Y H:M

The time must be for the time zone **US/Central**, in which the current time is **12:00:00 AM** on **1/1/2020**.

Allow 'Save & Return Later' option for respondents?
 (Allow respondents to leave the survey and return later.) [?]

Allow respondents to return without needing a return code [?]

NOTE: If you are collecting identifying information (e.g., PII, PHI), for privacy reasons it is HIGHLY recommended that you leave the option unchecked so as to enforce a return code.

Allow respondents to return and modify completed responses [?]

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>, [survey-uri:other_survey]

[How to use Piping here](#)

— OR —

The next section selects access restrictions for your survey

Disregard the “Save and Return Later” field for public surveys. This option only applies to individualized surveys.



Now that we've managed the survey settings, click on the instrument name to begin adding questions to your survey.

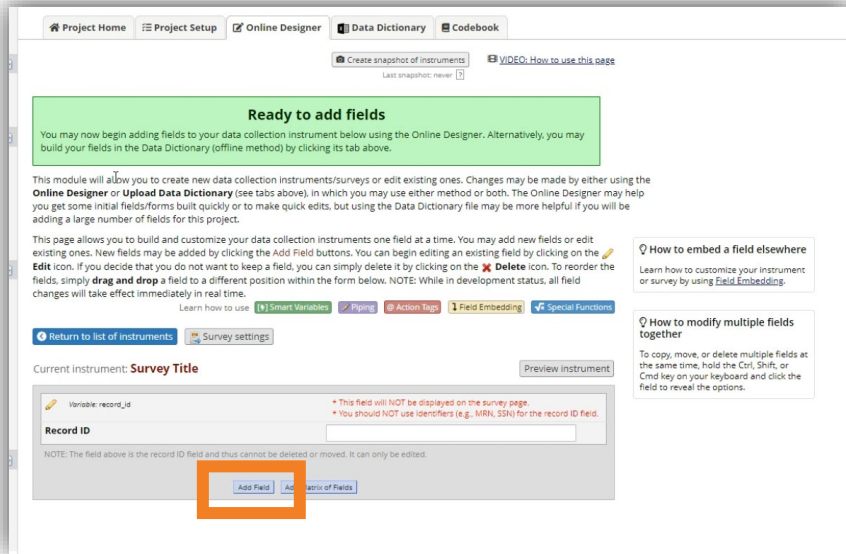
The screenshot shows the REDCap Online Designer interface. At the top, there are navigation tabs: Project Home, Project Setup, Online Designer, Data Dictionary, and Codebook. Below these, there are buttons for 'Create snapshot of instruments' and a video link 'VIDEO: How to use this page'. A note states: '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.'

The main section is titled 'Data Collection Instruments'. It includes options to 'Add new instrument': 'Create' (a new instrument from scratch), 'Import' (a new instrument from the official REDCap Shared Library), and 'Upload' (instrument ZIP file from another project/user or external libraries). There are also 'Survey options' (Survey Queue, Survey Login, Survey Notifications) and 'Automated Survey Invitation options' (Upload or download Auto Invitations, Re-evaluate Auto Invitations).

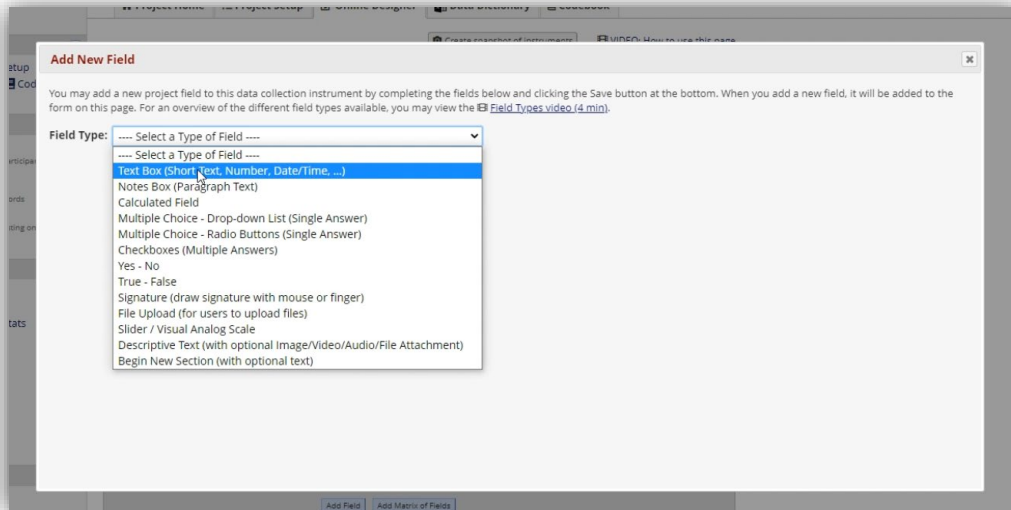
Below this is a table with the following columns: Instrument name, Fields, View PDF, Enabled as survey, Instrument actions, and Survey-related options. The first row of the table has 'Survey Title' in the 'Instrument name' column, which is highlighted with an orange box. The 'Fields' column shows '1', 'View PDF' has a PDF icon, 'Enabled as survey' has a green checkmark, 'Instrument actions' has a 'Choose action' dropdown, and 'Survey-related options' has 'Survey settings' and '+ Automated Invitations' buttons.

FYI: The “Instrument Actions” dropdown allows you to edit the name of your survey, copy/duplicate an entire survey, delete the survey, or download it. The survey title should be intuitive so that all users can understand (e.g. “Post Session 1 Evaluation” as opposed to “Survey 1”)





Click “Add Field” to add a question to your survey



A pop-up will appear with a dropdown to select what type of question you want to add. Please reference our other guides & LinkedIn Learning videos for question type best-practices



Once you select what type of question you want to ask (referred to as a 'Field Type'), the screen will populate with the fields to format your question. The actual text of the question is called a 'Field Label'

The variable name should be intuitive for you for when you export your results as well as advanced REDCap functions like branching logic. Please note, it will automatically correct to a compatible format (e.g. underscores added) so confirm the name still makes sense after clicking away from the box. Please see our other guides for more information about variable naming conventions.

The 'validation' field will help ensure that responses are relevant and formatted correctly. For example, selecting an "Email" validation will alert users if they don't submit a valid email address.

The 'Field Note' option is for if you want to provide additional directions or context for a given question

Remember to click "Save"



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: Notes Box (Paragraph Text)

Field Label: W Use the Rich Text Editor ?

Variable Name (utilized in logic, calcs, and exports)
ONLY letters, numbers, and underscores Enable auto naming of variable based upon its Field Label?

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

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

Action Tags / Field Annotation (optional)

Learn about [Action Tags](#) or [using Field Annotation](#)

Save Cancel

About the “Notes Box” field type option: This option is for open paragraph text for when you want respondents to either explain their responses in more detail or provide open-ended responses (e.g. program feedback, etc)



For multiple-choice questions where you only want respondents to select a single answer, radio buttons is the most common field type.

In the choices box, list each multiple-choice option on a new line.

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.

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:

Field Label Use the Rich Text Editor ?
What is your second favorite color?

Choices (one choice per line) [Copy existing choices](#)
Red
Blue
Green
Purple

How do I manually code the choices?

Action Tags / Field Annotation (optional)

Learn about [Action Tags](#) or [using Field Annotation](#)

Variable Name (utilized in logic, calcs, and exports)
nd_favorite Enable auto naming of variable based upon its Field Label?
ONLY letters, numbers, and underscores

How to use: [Smart Variables](#) [Piping](#) [Field Embedding](#)

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

Save Cancel

Raw values for choices were added automatically

The choices listed below did not appear to have a raw value listed but only had a label, so a raw value has been provided for them automatically. If you are not satisfied with these auto generated values, you may change them before saving your changes for this field. The choices in the 'Choices' text box have automatically been modified to reflect these changes.

1 was set as the raw value for **Red**
2 was set as the raw value for **Blue**
3 was set as the raw value for **Green**
4 was set as the raw value for **Purple**

Close

Once you click away from the choices box, REDCap will automatically assign sequential numbers to each of the lines

FYI: The raw values are not displayed on the survey but can be downloaded in the survey responses to aid with statistical analysis (if applicable)

Remember to click "Save"



[Return to list of instruments](#) [Survey settings](#)

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:

Field Label Use the Rich Text Editor [?](#)

Select your 3 favorite colors

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

1, Yellow
2, Orange
3, green
4, Blue

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

Action Tags / Field Annotation (optional)

Learn about [Action Tags](#) or [using Field Annotation](#)

Variable Name (utilized in logic, calcs, and exports)
 Enable auto naming of variable based upon its Field Label?
ONLY letters, numbers, and underscores

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

Required?* No Yes
* Prompt if field is blank

Identifier? No Yes
Does the field contain identifying information (e.g., name, SSN, address)?

Custom Alignment

Field Note (optional)

Small reminder text displayed underneath field

For questions where respondents can select more than one option, choose the **checkboxes** field type.

Remember to click "Save"



To change the order of survey questions, hover your cursor over the question you want to move until the four-way arrow appears. Then click to drag to the desired position

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

Variable: favorite_color

What is your favorite color?

directions

Add Field Add Matrix of Fields

Variable: why_favorite_color

Why is the above your favorite color?

* must provide value

Expand

Add Field Add Matrix of Fields

Variable: nd_favorite

What is your second favorite color?

Red
 Blue
 Green
 Purple

reset

Add Field Add Matrix of Fields

Variable: favorite_colors

[No Title]

Select your 3 favorite colors

Yellow
 Orange
 green
 Blue

Add Field Add Matrix of Fields

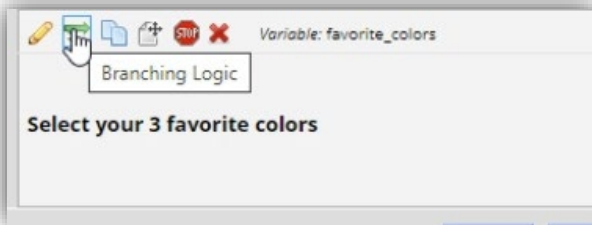
How to embed a field elsewhere
Learn how to customize your instrument or survey by using [Field Embedding](#).

How to modify multiple fields together
To copy, move, or delete multiple fields at the same time, hold the Ctrl, Shift, or Cmd key on your keyboard and click the field to reveal the options.



Branching Logic

Branching Logic is when you want create different pathways for respondents based upon how they answer a specified question. This only works on questions with structured data (e.g. multiple choice, checkboxes – not open text)



First, you'll want to identify the question/variable you want to branch FROM and which question/variable you'll want to branch TO.

Go to the question/variable you want to branch TO and click the green arrow button. You'll indicate which question you want to branch FROM on the next screen.

Clicking the green arrow button is the same as saying:

"I only want respondents to see this question if they answer a previous question in a specific way"



Branching Logic

Continued

Document: Survey Title

Preview Instrument

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: **why_favorite_color** - Why is the above your favori...

Advanced Branching Logic Syntax How to use: Branching Logic Smart Variables Special Functions

Show the field ONLY if...

Test logic with a record: -- select record -- [Clear logic](#)

— OR —

Drag-N-Drop Logic Builder

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

Drag and Drop

Show the field ONLY if...

ALL below are true
 ANY below are true

FIELDS

[nd_favorite] What is your se...

Click the box below ‘Show the field ONLY if...’ and type in an open bracket (“[“). After the bracket, start typing in variable name of the question that you want to redirect FROM.

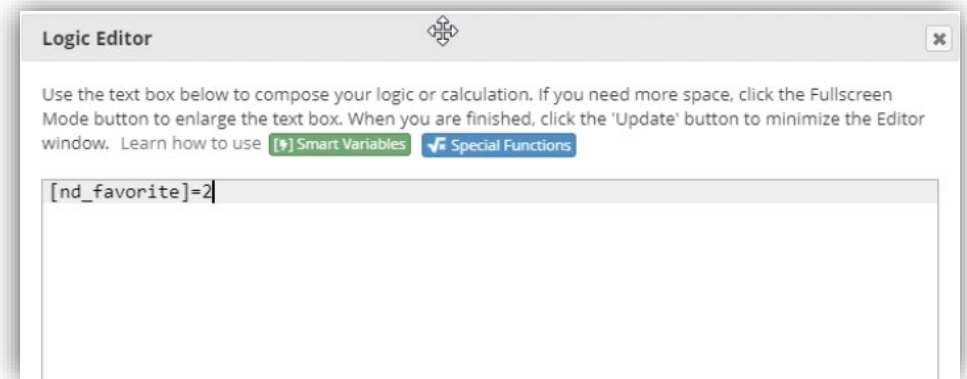
REDCap will auto-populate any corresponding variable names and reminder text of the field label (e.g. the question).



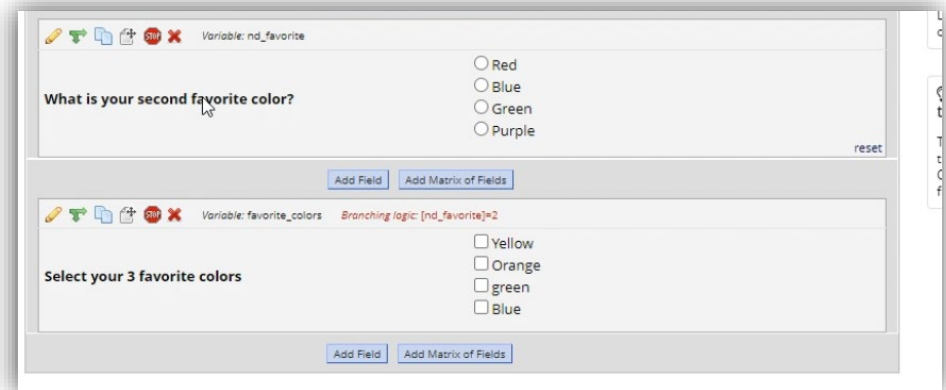
Branching Logic

Continued

After the variable populates, type in “=” and select the number corresponding to answer you want to redirect from in the respective question



Variable: “nd_favorite”



The branching logic code of [nd_favorite]=2 means:



“Only show this question if the response to prior question is the 2nd choice (Blue)”

The branching logic code appears in red text. Re-click the green arrows to edit this



From here there are two different ways to test & distribute your survey:

- A public survey (general URL – allows for multiple responses)
- An individualized survey where each respondent gets a unique URL

See our separate guides for testing & distributing your survey