

# Survey Styling

## CCTS Biostatistics Core

March 2023

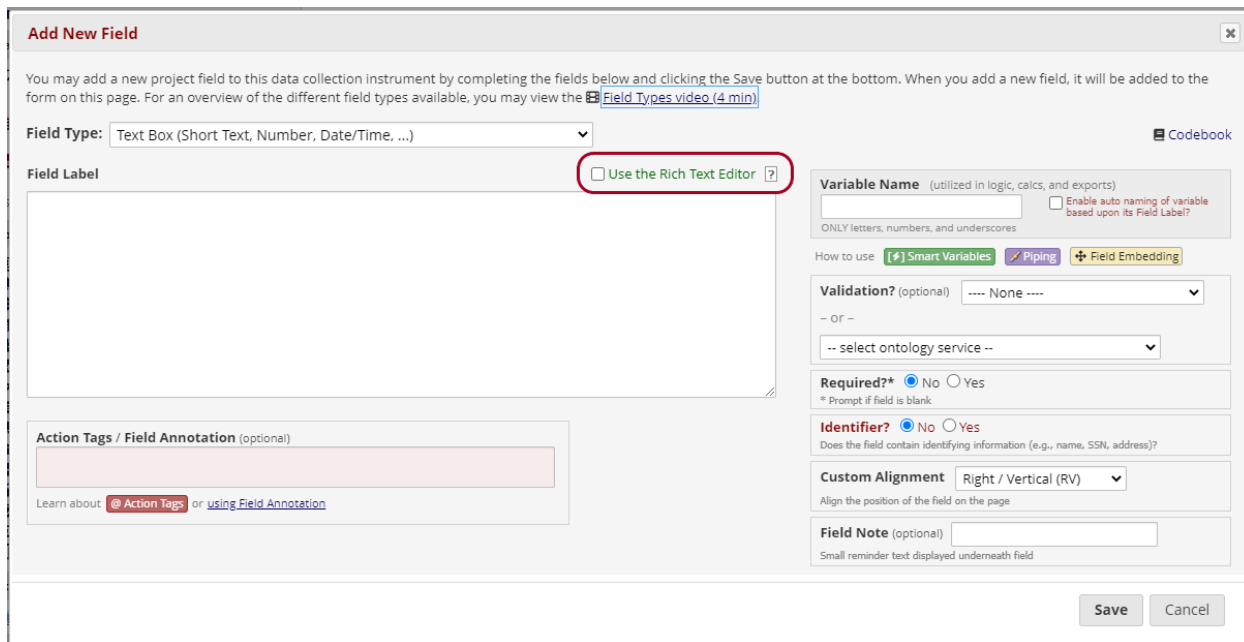
### Overview

REDCap offers several ways to customize the layout and styling of your surveys. Use these tools to improve respondents' experience taking your surveys and to match the design of your other project documents.

### Rich Text Editor

The Online Designer provides an interface called the Rich Text Editor that allows you to customize the styling of descriptive text and field labels.

To enable it, add a new field to one of your instruments or open an existing field for editing. Check the Use the Rich Text Editor box.



**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: Text Box (Short Text, Number, Date/Time, ...)

Field Label

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](#)

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 Right / Vertical (RV)

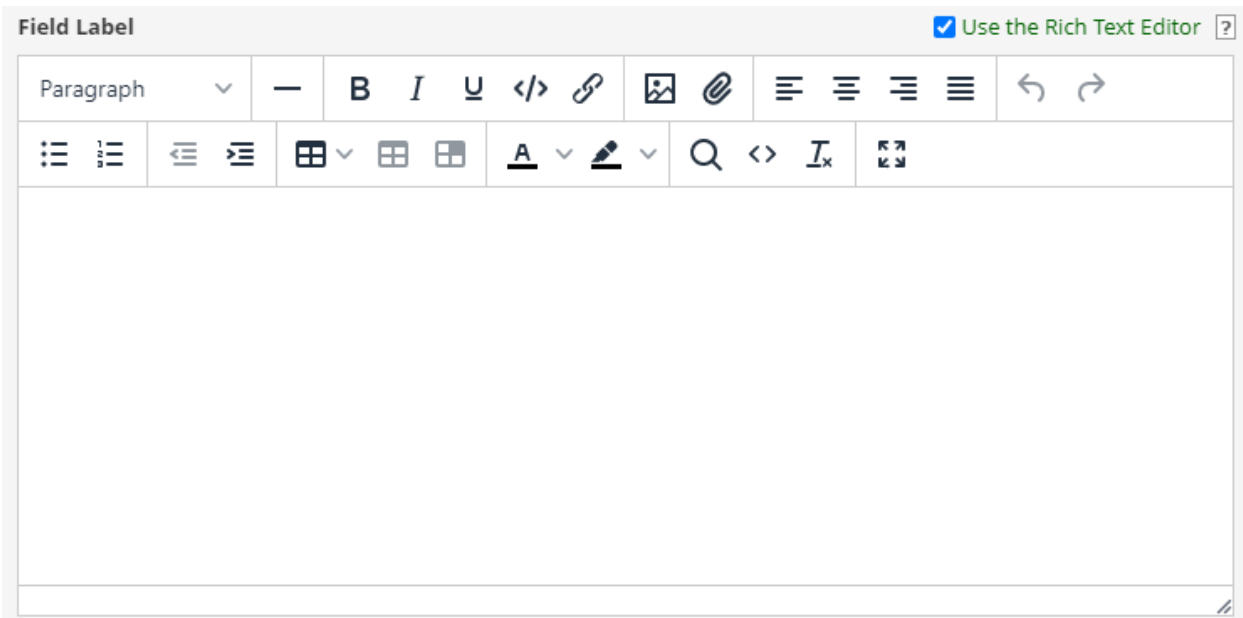
Align the position of the field on the page

Field Note (optional)

Small reminder text displayed underneath field

Save Cancel

A panel of text-styling tools will appear at the top of the Field Label box.



You can use these tools to:

- Modify font color and style (e.g., bold, italic, underlined, or highlighted)
- Change text alignment and indentation
- Insert numbered or bulleted lists
- Insert hyperlinks
- Insert images or attachments
- Insert and style tables

### Example: Formatting Using Tables

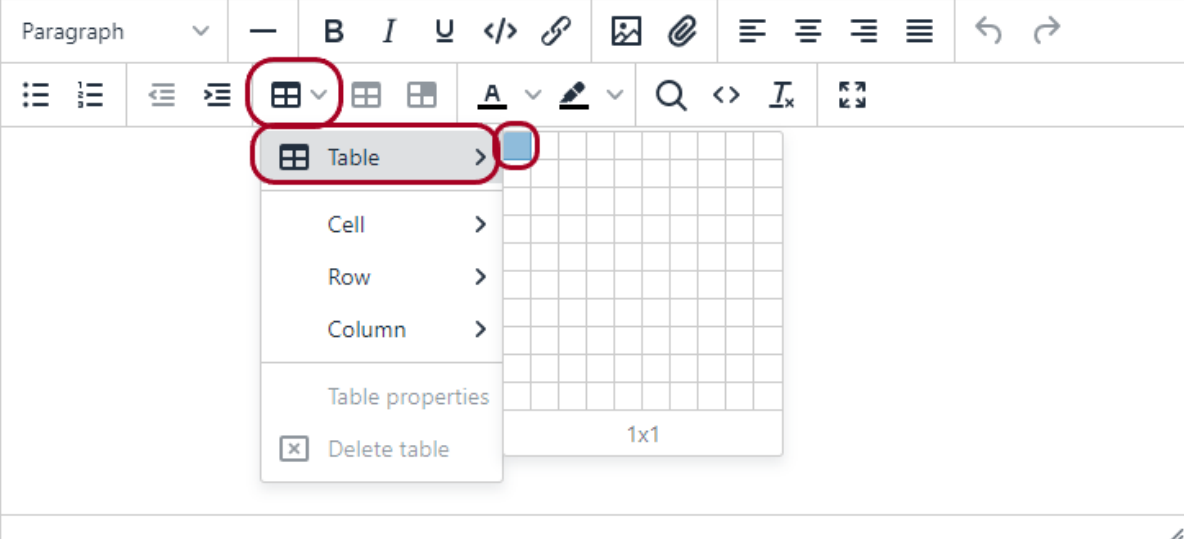
Tables in descriptive text fields can be especially useful for controlling the placement, alignment, and shading of text. For example, you may want to display an alert on your survey if a previous comment field is skipped. To do this, add a descriptive text field where the alert should display. Enable the rich text editor and insert a one-cell table.

**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 on this page. For an overview of the different field types available, you may view the [Field Types video \(4 min\)](#).

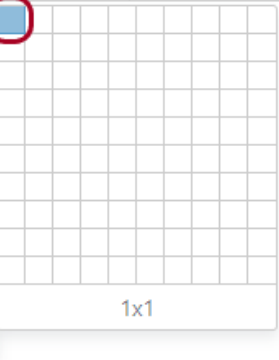
Field Type: Descriptive Text (with optional Image/Video/Audio/File Attachment) ▾

Field Label ☑ Use the Rich Text Editor ?



Paragraph ▾ — **B** *I* U </> ≡ ≡ ≡ ≡ ↶ ↷

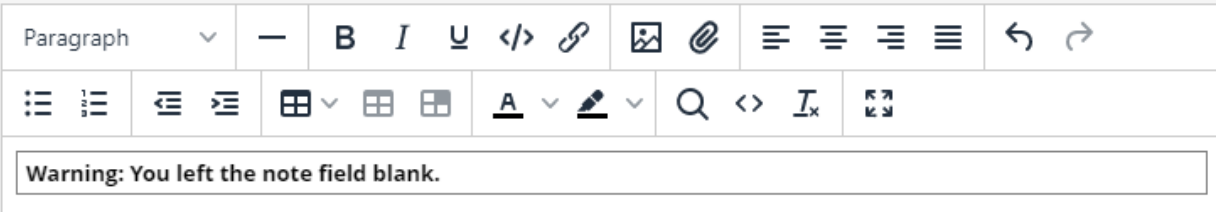
☰ ☷ ⏪ ⏩ ▾ A ▾ ▾ 🔍 <> *I*<sub>x</sub>

☰ Table >   
Cell >  
Row >  
Column >  
Table properties  
 Delete table

1x1

Type the alert message inside the cell you just created.

Field Label ☑ Use the Rich Text Editor ?

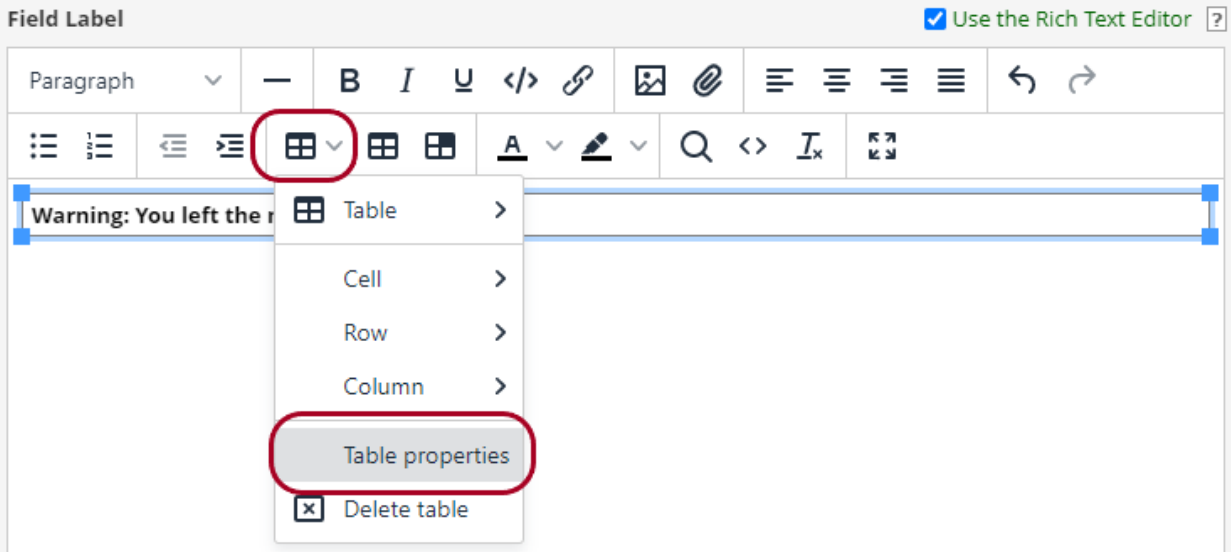


Paragraph ▾ — **B** *I* U </> ≡ ≡ ≡ ≡ ↶ ↷

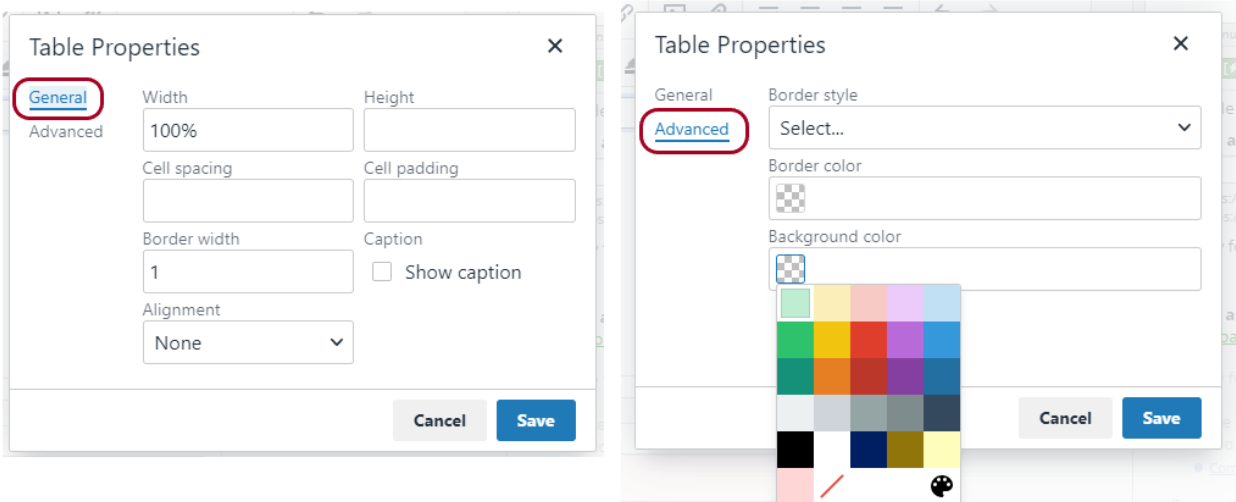
☰ ☷ ⏪ ⏩ ▾ A ▾ ▾ 🔍 <> *I*<sub>x</sub>

Warning: You left the note field blank.

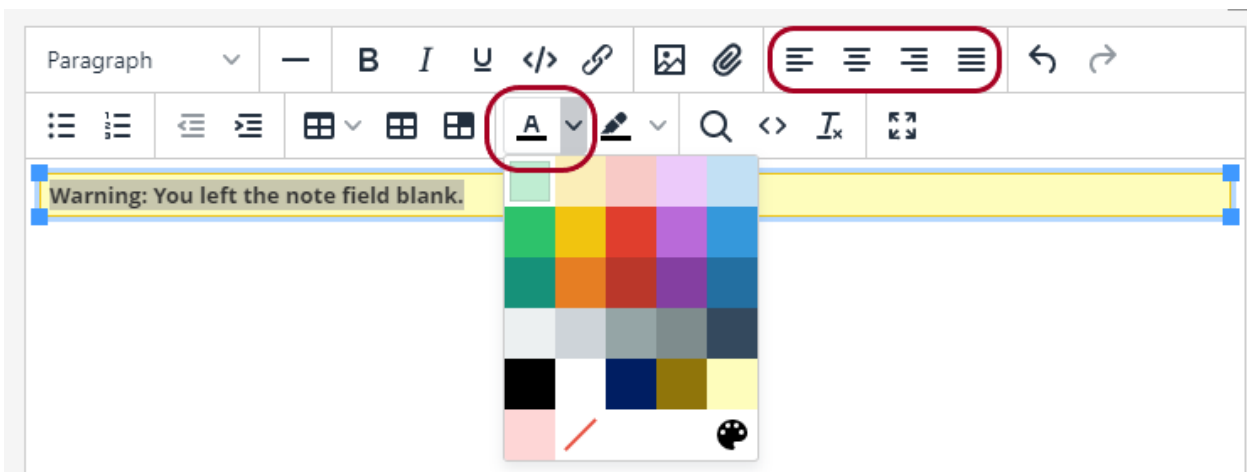
Edit the table's appearance to match the style you want. To change the background or border color, select the table and then open the Table properties panel.



Edit settings on the General and Advanced tabs and then click Save.



Edit text color and alignment using the rich text editor tools.



When you have finished editing the alert field, save it. Then define branching logic so that the alert displays when the comment field is empty.

Open your survey to preview the results.

The screenshot shows a survey form with a 'Comments' field. The field is empty and has a 'Warning: You left the note field blank.' message displayed below it. The word 'Expand' is visible in the bottom right corner of the form area.

### Rich Text Fields on Surveys

You can give your respondents access to the rich text editor in notes fields on surveys. This might be helpful if, for example, participants need to insert hyperlinks into their survey responses. The REDCap explanation of the @RICHTEXT action tag states:

Adds the rich text editor toolbar to a Notes field to allow users/participants to control the appearance (via styling and formatting) of the text they are entering into the field. To ensure all rich text controls are displayed, set Custom Alignment to one of the Left options.

To give respondents access to the rich text editor, include the @RICHTEXT action tag as part of a notes box field.

The screenshot shows the REDCap form configuration interface for a 'Notes Box (Paragraph Text)' field. The 'Field Type' is set to 'Notes Box (Paragraph Text)'. The 'Question Number' is optional and displayed only on the survey page. The 'Field Label' is 'Comments'. The 'Use the Rich Text Editor' checkbox is checked. The 'Action Tags / Field Annotation' section contains the @RICHTEXT tag. The 'Variable Name' is 'comments'. The 'Required?' field is set to 'No'. The 'Identifier?' field is set to 'No'. The 'Custom Alignment' is set to 'Left / Vertical (LV)'. The 'Field Note' is optional and displayed underneath the field. The 'Save' and 'Cancel' buttons are visible at the bottom right.

Users will then see the rich text options on the survey.



	A	G	H
1	record_id	intake_timestamp	comments
20	15	3/17/2023 10:09	<pre>&lt;p&gt;&lt;span style="color: #ba372a;"&gt;&lt;strong&gt;This is a comment.&lt;/strong&gt;&lt;/span&gt;&lt;/p&gt; &lt;ul&gt; &lt;li&gt;This&lt;/li&gt; &lt;li&gt;is&lt;/li&gt; &lt;li&gt;a&lt;/li&gt; &lt;li&gt;list.&lt;/li&gt; &lt;/ul&gt;</pre>
21			

## HTML

In some cases, you may want to customize your field labels beyond what's available in the rich text editor. You have the option to insert raw HTML and inline CSS to accomplish this.

To add raw HTML to a field label, uncheck the `Use the Rich Text Editor` box.

Then type your HTML into the field label box. For example, to add a superscript footnote, you can use the `<sup>` element tag.

**Field Label**  Use the Rich Text Editor ?

```
This is an explanation with a footnote.<sup>1</sup>
<hr>
<sup>1</sup>This is footnote 1.
```

REDCap will render the HTML when it displays the field on your form or data collection instrument.

This is an explanation with a footnote.<sup>1</sup>

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<sup>1</sup>This is footnote 1.

## Survey Settings

When a data collection instrument is enabled as a survey, you can control the fonts, headers, and colors on the Survey Settings page. Access this page for each survey from the Online Designer.

Data Collection Instruments		Form options:		Survey options:	
<a href="#">+ Create</a> a new instrument from scratch <a href="#">Import</a> a new instrument from the official <a href="#">REDCap Instrument Library</a>		<a href="#">Form Display Logic</a>		<a href="#">Survey Queue</a> <a href="#">Auto Invitation options</a> <a href="#">Survey Notifications</a>	
Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey related options
Intake	8			Choose action ▾	<input checked="" type="checkbox"/> Survey settings <input type="checkbox"/> Automated Invitations
Followup Survey	2			Choose action ▾	<input checked="" type="checkbox"/> Survey settings <input type="checkbox"/> Automated Invitations

In the Survey Design Options section, you can add an optional header logo, choose a color scheme, and set font colors and sizes.



**Survey Design Options:** [Copy design to other surveys](#)

**Width of survey on page**  
Set a custom width as a percentage of the webpage that the survey will take up. Fixed width (default)

Note: The percentage page width settings are fully dependent on the participant's screen size. This setting will not be applied when viewing the survey on mobile devices.

**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.)  
 Hide survey title on survey page when display logo

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

**Size of survey text**  
Large

**Font of survey text**  
Open Sans

**Survey theme**  
Default

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, as well as 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.**

To keep styling consistent across all surveys in a project, you can choose to copy the design from one survey to another. To do this, click [Copy design to other surveys](#).

**Survey Design Options:** [Copy design to other surveys](#)

**Width of survey on page**  
Set a custom width as a percentage of the webpage that the survey will take up. Fixed width (default)

Note: The percentage page width settings are fully dependent on the participant's screen size. This setting will not be applied when viewing the survey on mobile devices.

You can then choose which elements to copy to which surveys in your project.

**Copy design to other surveys**
✕

You may copy any of the current survey's design settings to other surveys in this project. Check off the specific settings you wish to copy, and then choose the surveys to which those settings should be applied.

**Copy the following design settings:**

- Width of survey on page
- Logo
- Standard/enhanced radios and checkboxes
- Size of survey text
- Font of survey text
- Survey theme (including any customizations)

**Apply to the surveys below:** ([Check All](#) | [Uncheck All](#))

- "Followup Survey"
- "Third Survey"

Copy design settings
Cancel

## Embedded Fields

Field embedding is a tool within REDCap that allows you to insert fields into other fields to precisely control where they appear on a page. Field embedding is often used in conjunction with tables to make fields appear side-by-side. For example, you may have a survey that collects each respondent's full name, nickname, and email address. Usually, these fields will appear vertically.

<b>First Name</b> <small>* must provide value</small>	<input style="width: 100%;" type="text"/>
<b>Last Name</b> <small>* must provide value</small>	<input style="width: 100%;" type="text"/>
<b>Nickname</b>	<input style="width: 100%;" type="text"/>
<b>Email Address</b>	<input style="width: 100%;" type="text"/>

If you want the fields to appear horizontally on one line, you can use field embedding.

First, create a descriptive text field on the **same page** of the survey where the fields appear. Enable the rich text editor and insert a table. In this case, to put four fields on the same line, create a table with four columns (one for each field) and two rows (one for labels and one for fields).

## 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 on this page. For an overview of the different field types available, you may view the [Field Types video \(4 min\)](#).

Field Type:

Question Number (optional)   
Displayed only on the survey page

Field Label

Use the Rich Text Editor [?](#)

The screenshot shows the Rich Text Editor toolbar with a table icon selected. A dropdown menu is open, displaying options for 'Table', 'Cell', 'Row', 'Column', 'Table properties', and 'Delete table'. A 4x2 grid is visible in the background of the menu, and the text '4x2' is displayed at the bottom right of the menu.

Add custom text to the first row. Note that only this text will display; the field labels defined as part of each field will be hidden from respondents. In the second row, include each variable name, wrapped in **curly braces**, where you want it to appear. Use the rich text tools to format the table, labels, and fields.

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

The screenshot shows the Rich Text Editor toolbar with a table icon selected. A dropdown menu is open, displaying options for 'Table', 'Cell', 'Row', 'Column', 'Table properties', and 'Delete table'. A 4x2 grid is visible in the background of the menu, and the text '4x2' is displayed at the bottom right of the menu.

First Name	Last Name	Preferred Name	Email
{name}	{name_2}	{nickname}	{email}

The data collection instrument will alert you about fields that are embedded elsewhere or that contain embedded fields.

The screenshot shows the REDCap field editor interface. At the top, there is a toolbar with icons for edit, copy, paste, and delete, followed by the text "Variable: name\_embed". Below this, a table lists four fields: "First Name" with value "{name}", "Last Name" with value "{name\_2}", "Preferred Name" with value "{nickname}", and "Email" with value "{email}". Below the table are three buttons: "Add Field", "Add Matrix of Fields", and "Import from Field Bank". A red-bordered box highlights a message in the top right corner that says "Contains embedded fields". Below the table, there is another toolbar with icons for edit, copy, paste, and delete, followed by the text "Variable: name". Below this, a single field "First Name" is shown with a red asterisk and the text "\* must provide value" below it. A red-bordered box highlights a message in the top right corner that says "Field is embedded elsewhere on page".

Fields on your survey will now appear in their embedded location.

The screenshot shows the rendered survey form. It consists of four input fields arranged horizontally, each with a label above it: "First Name", "Last Name", "Preferred Name", and "Email". Each field is a simple text input box.

For more examples and details of field embedding, see the [REDCap documentation](#).

## External Module: Shazam

Shazam is an external module that allows even more fine-grained control of field layouts and styling. It requires some knowledge of HTML and CSS. Its capabilities are similar to field embedding, but it allows more complex and dynamic layouts. For example, rows and columns of tables can be conditionally hidden or shown based on fields' branching logic.

From the Shazam module documentation:

This module allows you to create custom instrument layouts, similar to custom input matrixes. You can arrange dropdown, radio, input, and other fields into a custom html element and insert that into your instrument.

[...]

It also supports the ability to hide and show some of your custom elements based on other branched REDCap elements. This means you could make a complex table and be able to hide/show rows of that table based on another REDCap field - similar to how one can do branching on rows in an input matrix.

See the [module documentation](#) for more information. To enable Shazam on your project, please [contact the REDCap administrator](#).