

REDCap Practice Workshop

Basic Features

CCTS Biostatistics Core

March 2024

Introduction

This exercise will lead you through the process of creating and customizing a project in REDCap. Each step will demonstrate one or more core elements of the platform.

This exercise requires a full-access REDCap user account, which allows you to create, copy, and delete projects. If you do not have a full-access user account, you can request one through the [REDCap Ticketing System](#).

Create a New Project

Log in to REDCap.

1. Visit <https://ccts-redcap.ihrp.uic.edu>.
2. Log in with your username and password.



Log In



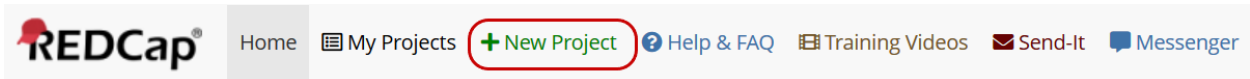
By logging into the CCTS REDCap system, you agree to our **Terms of Use**. Please read the policies [located here](#)

Please log in with your user name and password. If you are having trouble logging in, please contact [REDCap Support at CCTS](#).

Username:	<input type="text"/>
Password:	<input type="password"/>
<input type="button" value="Log In"/>	Forgot your password?

Create a new blank project with title “[your name]_Test [date].” Select “Practice / Just for fun” as the project purpose.

1. At the top of the REDCap home screen, click + New Project.



2. Fill out each project field. Then click Create Project.

+ 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?

Project notes (optional):
Comments describing the project's use or purpose that are displayed on the My Projects page.

Start project from scratch or begin with a template?

Create an empty project (blank slate)
 Upload a REDCap project XML file (CDISC ODM format) [?](#)
 Use a template (choose one below)

★ **Choose a project template** (comes pre-filled with fields, forms/surveys, and other settings) [+ Add templates \(Administrators only\)](#)

select template	Template title (sorted by title)	Template description
<input type="radio"/>	Basic Demography	Contains a single data collection instrument to capture basic demographic information.
<input type="radio"/>	Classic Database	Contains six data entry forms, including forms for demography and baseline data, three monthly data forms, and concludes with a completion data form.
<input type="radio"/>	Longitudinal Database (1 arm)	Contains nine data entry forms (beginning with a demography form) for collecting data longitudinally over eight different events.
<input type="radio"/>	Multiple Surveys (classic)	Contains three surveys and a data entry form. Includes a pre-screening survey followed by two follow-up surveys to capture information from the participant, and then a data entry

Create Data Collection Instruments

Open the Online Designer to start customizing your project.

1. On the left menu under Project Home and Design, click Project Setup.



2. Click Online Designer.

 A screenshot of the REDCap project dashboard. At the top, there are navigation buttons: Project Home, Project Setup, Other Functionality, Project Revision History, and Edit project. Below this, the project status is 'Development' and it shows 'Completed steps 0 of 8'. There are two main sections:

- Main project settings:** Includes options to 'Use surveys in this project?' and 'Use longitudinal data collection with defined events?'. Both have 'Disable' buttons and green checkmarks. A video link 'VIDEO: How to create and manage a survey' is also present. A button 'I'm done!' is at the bottom left.
- Design your data collection instruments & enable your surveys:** Explains how to add or edit fields. It includes quick links for downloading PDFs and the current Data Dictionary. A button 'I'm done!' is at the bottom left. The 'Online Designer' button is highlighted with a red circle. Other buttons include 'Data Dictionary', 'Explore the REDCap Shared Library', and 'Check For Identifiers'.

3. Alternatively, click Designer in the left menu under Project Home and Design.

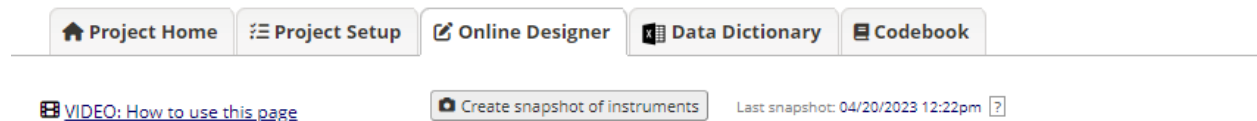


Add two data collection instruments with the following names: **Eligibility Questionnaire** and **Follow-up Questionnaire**.

1. Open the Online Designer.



- To create each instrument, click + Create. Then click + Add instrument here.



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.

Data Collection Instruments Form options:
Form Display Logic ▾

+ Create a new instrument from scratch

[Import](#) a new instrument from the official [REDCap Instrument Library](#)

[Upload](#) instrument ZIP file from another project/user or [external libraries](#)

Instrument name	Fields	View PDF	Instrument actions
Eligibility Questionnaire	17		Choose action ▾
+ Add instrument here			

- Type the instrument name and click Create.

New instrument name: Create Cancel

- To copy or rename an existing instrument, use the menu under Instrument actions.

Data Collection Instruments Form options:
Form Display Logic ▾

+ Create a new instrument from scratch

[Import](#) a new instrument from the official [REDCap Instrument Library](#)

[Upload](#) instrument ZIP file from another project/user or [external libraries](#)

Instrument name	Fields	View PDF	Instrument actions
Eligibility Questionnaire	17		Choose action ▾
Follow-up Questionnaire	2		<div style="border: 1px solid red; padding: 5px; width: fit-content;"> <ul style="list-style-type: none"> Rename Copy Delete Download instrument ZIP </div>

Build each form using the field names, field types, and validation rules listed in the [tables at the end of this document](#).

- To open an instrument for editing, click its name.

Data Collection Instruments

Form options: [Form Display Logic](#)

[+ Create](#) a new instrument from scratch
[Import](#) a new instrument from the instrument library
[Upload](#) instrument ZIP file from an external source

Click to modify instrument
 Add new fields/questions to the instrument or modify existing ones.

Instrument name	Fields	View PDF	Instrument actions
Eligibility Questionnaire	17		Choose action
Follow-up Questionnaire	2		Choose action

2. Click Add Field in the desired location.

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

Current instrument: **Eligibility Questionnaire**

[Preview instrument](#)

Variable: record_id * This field will NOT be displayed on the survey page.

Record ID

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](#)

3. Select a field type from the dropdown menu. Review and set each field attribute. Then 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: Text Box (Short Text, Number, Date/Time, ...)

Field Label Use the Rich Text Editor ?

Action Tags / Field Annotation (optional)

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

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](#)

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

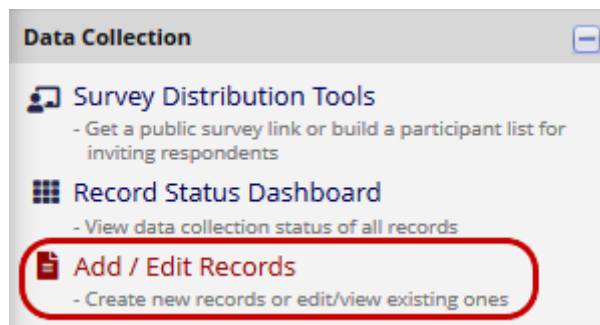
Save
Cancel

Add and Edit Records

Add Test Data

Create a new record.

1. Click on Add / Edit Records.



2. Click + Add new record.

Add / Edit Records

You may view an existing record/response by selecting it from the drop-down lists below. To create a new record/response, click the button below.

NOTICE: This project is currently in Development status. **Real data should NOT be entered** until the project has been moved to Production status.

Total records: 2

Choose an existing Record ID	-- select record --
<input type="button" value="+ Add new record"/>	

Enter data to test each form.

1. Try to enter nonsensical data to test the validation rules of each field. You will receive an error message if any of the branching logic or calculated fields were not set up correctly.

Alert ✕


The value you provided could not be validated because it does not follow the expected format. Please try again.

Required format: Date (M-D-Y)

2. When you have tested all fields on a form, click Save & Exit Form.

Form Status

Complete? Complete

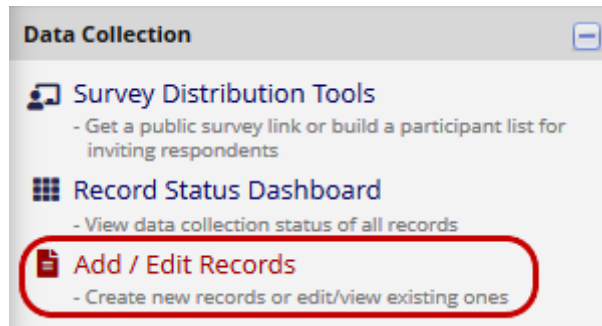
Lock this record for this form?  Lock

If locked, no user will be able to edit this record on this form until someone with Lock/Unlock privileges unlocks it.

View Data

Open an existing respondent's record home page.

1. Click on Add / Edit Records.



2. Choose or search for a record by ID or instrument response(s).

Total records: 2

Choose an existing Record ID	-- select record --
	-- select record --
	1
	2

Data Search

Choose a field to search <small>(excludes multiple choice fields)</small>	All fields
Search query <small>Begin typing to search the project data, then click an item in the list to navigate to that record.</small>	

Open an instance of a partial or complete response to view the data.

1. Click a status icon to view the corresponding response data. The icon color indicates the data entry status.

Record Home Page

The grid below displays the form-by-form progress of data entered for the currently selected record. You may click on the colored status icons to access that form/event.

Choose action for record

Legend for status icons:

- Incomplete
- Incomplete (no data saved) ?
- Unverified
- Complete

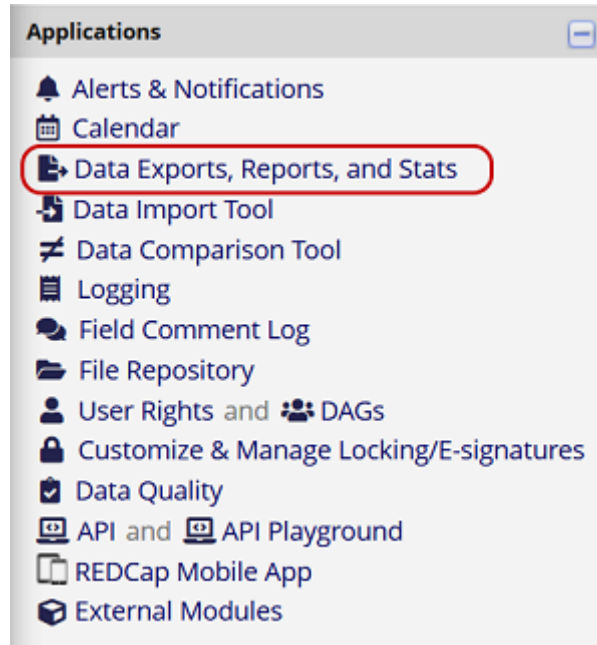
Record ID 10

Data Collection Instrument	Status
Eligibility Questionnaire	
Follow-up Questionnaire	

Export Data

Export project data in the “CSV / Microsoft Excel (raw data)” format.

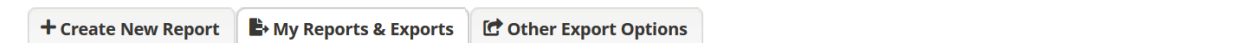
1. In the left menu under Applications, click Data Exports, Reports, and Stats.



2. Click Export Data.

Data Exports, Reports, and Stats

[VIDEO: How to use Data Exports, Reports, and Stats](#)



This module allows you to easily view reports of your data, inspect plots and descriptive statistics of your data, as well as export your data to Microsoft Excel, SAS, Stata, R, or SPSS for analysis (if you have such privileges). If you wish to export your *entire* data set or view it as a report, then Report A is the best and quickest way. However, if you want to view or export data from only specific instruments (or events) on the fly, then Report B is the best choice. You may also create your own custom reports below (if you have such privileges) in which you can filter the report to specific fields, records, or events using a vast array of filtering tools to make sure you get the exact data you want. Once you have created a report, you may view it as a webpage, export it out of REDCap in a specified format (Excel, SAS, Stata, SPSS, R), or view the plots and descriptive statistics for that report.








My Reports & Exports				
	Report name	View/Export Options	Management Options	Report ID (auto-generated)
A	All data (all records and fields)	View Report Export Data Stats & Charts		
B	Selected instruments and/or events (all records)	<input type="text" value="Make custom selections"/>		
+ Create New Report				

3. Review the possible formats, de-identification options, and advanced data formatting options. Choose the “CSV/Microsoft Excel (raw data)” format. Then click Export Data.

Exporting "All data (all records and fields)"

Select your export settings, which includes the export format (Excel/CSV, SAS, SPSS, R, Stata) and if you wish to perform de-identification on the data set.

Choose export format

-  **CSV / Microsoft Excel (raw data)**
-  **CSV / Microsoft Excel (labels)**
-  **SPSS Statistical Software**
-  **SAS Statistical Software**
-  **R Statistical Software**
-  **Stata Statistical Software**
-  **CDISC ODM (XML)**

De-identification options (optional)

The options below allow you to limit the amount of sensitive information that you are exporting out of the project. Check all that apply.

Known Identifiers:

- Remove all tagged Identifier fields (tagged in Data Dictionary)
- Hash the Record ID field (converts record name to an unrecognizable value)

Free-form text:

- Remove unvalidated Text fields (i.e. Text fields other than dates, numbers, etc.)
- Remove Notes/Essay box fields

Date and datetime fields:

- Remove all date and datetime fields
- OR —
- Shift all dates by value between 0 and 364 days (shifted amount determined by algorithm for each record) [What is date shifting?](#)

[Deselect all options](#)

Additional export options

- Export survey identifier field and survey timestamp field(s)?

Advanced data formatting options

Set CSV delimiter character
Set the delimiter used to separate values in the CSV data file (only valid for CSV Raw Data and CSV Labels export formats):

Force all numbers into a specified decimal format?
You may choose to force all data values containing a decimal to have a specified decimal character (comma or period/full stop). This will be applied to all calculations and number-validated text values in the export file.

NOTE: Your data formatting selections above will be remembered in the future and will be pre-selected upon your next export.

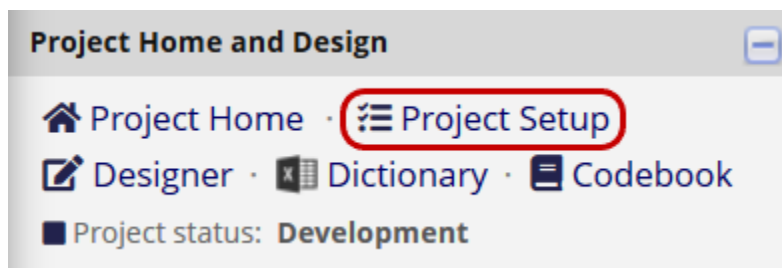
Export Data Cancel

Work With Surveys


Enable Longitudinal Data Collection

Enable longitudinal data collection for this project.

1. Open Project Setup.



2. Under "Main project settings," beside "Use longitudinal data collection with defined events?," click Enable.



Not started


Main project settings

Use surveys in this project? ? [VIDEO: How to create and manage a survey](#)

Use longitudinal data collection with defined events? ?

Create three events with the following names: **Baseline, 3 Months, and 6 Months.**

1. On the Project Setup tab, click *Define My Events*.



Define your events and designate instruments for them

Create events for re-using data collection instruments and/or set up scheduling.

Go to Define My Events or Designate Instruments for My Events







I'm done!

2. Enter each event's name and click **Add new event**.

Arm 1: Arm 1 +Add New Arm


Arm name: **Arm 1**

[Rename Arm 1](#)

	Event #	Event Name	Custom Event Label (optional)	Unique event name (auto-generated)
 	1	Baseline		baseline_arm_1
 	2	3 Months		3_months_arm_1
 	3	6 Months		6_months_arm_1
Add new event		<input style="width: 90%;" type="text"/> <small>Descriptive name for this event</small>	<input style="width: 90%;" type="text"/> <small>Custom Event Label (optional) Example: [visit_date], [weight] kg</small>	

Designate instruments for each event so you can collect eligibility data once and follow-up data at each timepoint. Link the **Eligibility Questionnaire** to the baseline event only. Link the **Follow-up Questionnaire** to all three events.

1. On the Project Setup tab, click **Designate Instruments for My Events**.



Define your events and designate instruments for them

Create events for re-using data collection instruments and/or set up scheduling.

Go to Define My Events or Designate Instruments for My Events

I'm done!

2. Click **Begin Editing**. Check the appropriate boxes beside each data collection instrument. Then click **Save**.

Project Setup Define My Events Designate Instruments for My Events

Since you have defined multiple events on the [Define My Events](#) page, you may now select which data collection instruments that you wish to utilize for each event by using the table below. This allows you to enter data on any data collection form multiple times for any given project record. Any and all data collection instruments can thus be used for any event defined.

Click the *Begin Editing* button to change the relationships below by designating which forms you wish to utilize for which events. When you are finished making changes, click the *Save* button to finalize your changes.

Upload or download instrument mappings ▾

Begin Editing Save Select All | Deselect All

Data Collection Instrument	Baseline (1)	3 month follow-up (2)	6 month follow-up (3)
Eligibility Questionnaire	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Follow-up Questionnaire	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Add a new record and observe the changes to the instrument structure.

1. Create a new record.

Add / Edit Records

You may view an existing record/response by selecting it from the drop-down lists below. To create a new record/response, click the button below.

NOTICE: This project is currently in Development status. **Real data should NOT be entered** until the project has been moved to Production status.

Total records: 2

Choose an existing Record ID

2. Notice how the instrument structure now allows longitudinal data collection.

Record Home Page

Record "15" is a new Record ID. To create the record and begin entering data for it, click any gray status icon below.

The grid below displays the form-by-form progress of data entered for the currently selected record. You may click on the colored status icons to access that form/event. If you wish, you may modify the events below by navigating to the [Define My Events](#) page.

Legend for status icons:

- Incomplete Incomplete (no data saved) ?
- Unverified
- Complete

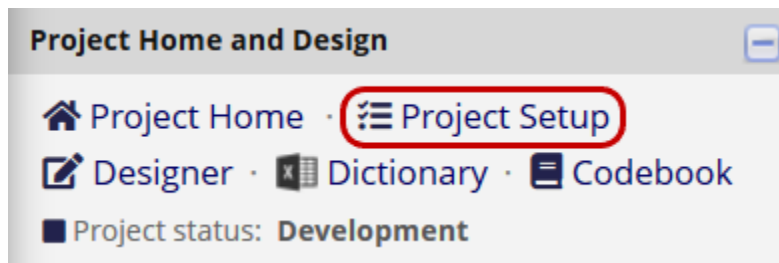
NEW Record ID 15

Data Collection Instrument	Baseline	3 month follow-up	6 month follow-up
Eligibility Questionnaire	<input type="radio"/>		
Follow-up Questionnaire	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

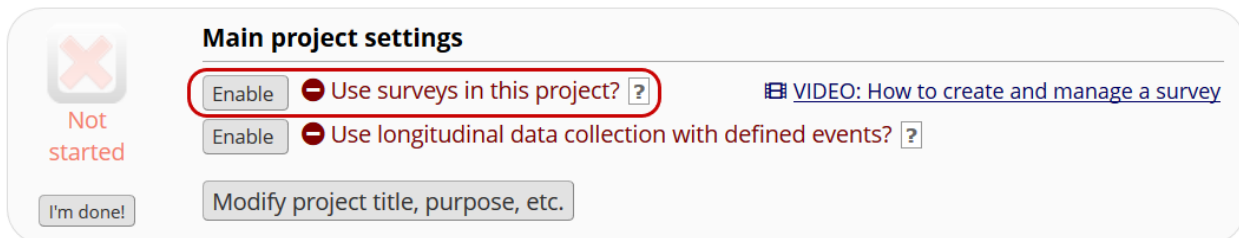
Set Up a Survey

Enable surveys in this project.

1. Open Project Setup.



2. Click Enable beside "Use survey in this project?"



Enable the second instrument (**Follow-up Questionnaire**) as a survey.

1. Open the Online Designer.



2. Beside the second instrument, click **Enable**. A “Set Up My Survey” tab will open.

Data Collection Instruments		Form options:		Survey options:	
+ Create	a new instrument from scratch	<input type="checkbox"/> Form Display Logic	<input type="checkbox"/> Survey Queue	<input type="checkbox"/> Auto Invitation options	<input type="checkbox"/> Survey Login
Import	a new instrument from the official REDCap Instrument Library	<input type="checkbox"/> Survey Notifications			
Upload	instrument ZIP file from another project/user or external libraries				
Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey related options
Eligibility Questionnaire	17		<input type="button" value="Enable"/>	Choose action	
Follow-up Questionnaire	2		<input type="button" value="Enable"/>	Choose action	

Allow users to save their progress and return later.

1. In the Survey Access section of the setup page, select **Yes** beside “Allow ‘Save & Return Later’ option for respondents?”

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:

Time Limit for Survey Completion (optional)
(The amount of time that each respondent has to complete the survey based on when they were initially sent the survey invitation. Note: This feature excludes public survey links.)

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 **America/Chicago**, in which the current time is **11/27/2019 10:39**.

Allow ‘Save & Return Later’ option for respondents?

Allow respondents to return without needing a return code [?](#)

Allow respondents to return and modify completed responses [?](#)

View Live Survey

Open an existing record. View the second instrument as a survey.

1. Open an existing respondent’s record home page.

Total records: 2

Choose an existing Record ID

-- select record --

-- select record --

1

2

Data Search

Choose a field to search
(excludes multiple choice fields)

All fields

Search query

Begin typing to search the project data, then click an item in the list to navigate to that record.

2. Click a status icon to view the corresponding response data.

Record Home Page

The grid below displays the form-by-form progress of data entered for the currently selected record. You may click on the colored status icons to access that form/event.

Choose action for record

Legend for status icons:

- Incomplete
- Incomplete (no data saved) ?
- Unverified
- Complete

Record ID 10

Data Collection Instrument	Status
Eligibility Questionnaire	<input checked="" type="radio"/>
Follow-up Questionnaire	<input type="radio"/>

3. Under Survey options, click on Open Survey.

Follow-up Questionnaire

Data Access Group: [No Assignment] ?

Invitation status: [Envelope icon]

Survey options

Open survey

Log out + Open survey

Compose survey invitation

Survey Access Code + QR Code

Editing existing Record ID 1.

Event: Baseline

Record ID 1

Please check the symptoms **your child** has had for the last three months [Check all that apply]

- Cough
- Wheeze
- Breathlessness
- Skin rash
- Vomiting

Share Live Survey

Note: REDCap allows use of a public survey URL for anonymous surveys. The URL becomes available when the first instrument of a project is enabled as a survey. You can create a shorter, more memorable version of your survey link by clicking [Create Custom Survey Link](#).

Survey Distribution Tools

[Public Survey Link](#) [Participant List](#) [Survey Invitation Log](#)

Using a public survey link is the simplest and fastest way to collect responses for your survey. You may obtain the survey link below to email it to your participants. Responses will be collected anonymously (unless the survey contains questions asking for identifying data from the participant). **NOTE:** Since this method uses a single survey link for all participants, it allows for the possibility of participants taking the survey multiple times, which may be necessary in some cases.

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: <https://www.redcap.msu.edu/surveys/P3-7NYOPTGCLPKDT..> 

Protect the public survey using the Google reCAPTCHA feature [?](#)

Link Actions

- [Open public survey](#)
- [Open public survey + Log out](#)
- [Send me URL via email](#)
- [Survey Access Code or QR Code](#)

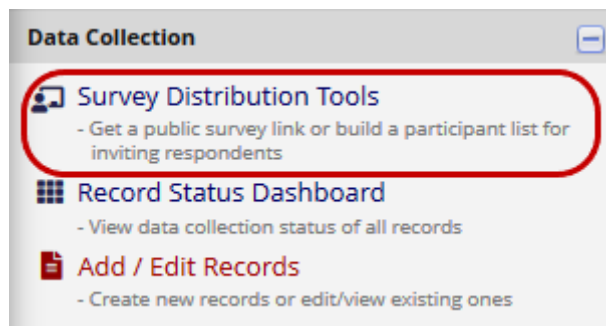
Link Customizations

- [Get Short Survey Link](#)
- [Create Custom Survey Link](#)
- [Get Embed Code](#)

For this exercise, you cannot use the public URL because the first instrument is not set up as survey. Instead, you must add individual participants' email addresses via the Survey Distribution Tool.

Using a personal email address, add yourself as a participant.

1. In the left menu under Data Collection, click on [Survey Distribution Tools](#).



2. On the "Participant List" tab, click [Add participants](#).

Survey Distribution Tools

[Public Survey Link](#)[Participant List](#)[Survey Invitation Log](#)

The Participant List option allows you to **send a customized email** to anyone in your list and **track who responds to your survey**. It is also possible to identify an individual's survey answers, if desired, by providing an Identifier for each participant (this feature must first be enabled by clicking the 'Enable' button in the table below). Note: All survey responses collected are considered anonymous unless you 1) are using Participant Identifiers or 2) have enabled the designated email field for invitations. [More details](#)

Participant List belonging to

Displaying of 2

3. Enter one or more email addresses and click Add participants.

Add Emails to Participant List

Copy and paste your list of participant email addresses, **one per line**.

Each participant starting on a new line

Example #1: john.williams@hotmail.com
Example #2: jimtaylor@yahoo.com
Example #3: putnamtr@gmail.com

Invite yourself to complete the survey. You will receive an invitation email from REDCap.

1. At the top of the Participant List, click Compose Survey Invitations.

Survey Distribution Tools

The Participant List option allows you to **send a customized email** to anyone in your list and **track who responds to your survey**. It is also possible to identify an individual's survey answers, if desired, by providing an Identifier for each participant (this feature must first be enabled by clicking the 'Enable' button in the table below). Note: All survey responses collected are considered anonymous unless you 1) are using Participant Identifiers or 2) have enabled the designated email field for invitations. [More details](#)

Participant List belonging to [Initial survey] "Eligibility Questionnaire" - Baseline Remove all participants

Displaying 1 - 2 of 2 + Add participants Compose Survey Invitations Export list

Email	Record	Participant Identifier	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code
		<input type="button" value="Enable"/>					

2. Edit the text in the "Compose" box and review the message settings. Make sure your personal email is selected in the Participant List. Click Send Invitations.

Send a Survey Invitation to Participants

Info

Survey title: Eligibility Questionnaire
Event: Baseline

When should the emails be sent?

Immediately
 At specified time: M/D/Y H:M
The time must be for the time zone America/Chicago, in which the current time is 11/27/2019 09:58.

Enable reminders

Re-send invitation as a reminder if participant has not responded by a specified time?

Compose message

From: (select any project user to be the 'Sender')

To: [All participants selected from Participant List]

Subject:

Please take this survey.

You may open the survey in your web browser by clicking the link below

Participant List Actions: -- check/uncheck participants --

(those who have not responded completely)

<input checked="" type="checkbox"/>	Email (0 selected)	Participant Identifier	Scheduled?	Sent?	Responded?
	No participants exist				

3. Check your email account for the invitation email. Follow the link in the email to complete the survey. Check the response status of invited participants.

1. Click on Survey Distribution Tools.

Data Collection

- Survey Distribution Tools**
- Get a public survey link or build a participant list for inviting respondents
- Record Status Dashboard**
- View data collection status of all records
- Add / Edit Records**
- Create new records or edit/view existing ones

- View each participant's status on the "Participant List" tab.

Survey Distribution Tools

[Public Survey Link](#)
[Participant List](#)
[Survey Invitation Log](#)

The Participant List option allows you to **send a customized email** to anyone in your list and **track who responds to your survey**. It is also possible to identify an individual's survey answers, if desired, by providing an Identifier for each participant (this feature must first be enabled by clicking the 'Enable' button in the table below). Note: All survey responses collected are considered anonymous unless you 1) are using Participant Identifiers or 2) have enabled the designated email field for invitations. [More details](#)

Participant List belonging to [Initial survey] "Eligibility Questionnaire" - Baseline								
Email	Record	Participant Identifier	Responded?	Invitation Scheduled?	Invitation Sent?	Link	Survey Access Code and QR Code	
test@example.com		<input type="button" value="Enable"/> Disabled	<input type="radio"/>	-	<input type="checkbox"/>			<input type="button" value="remove"/>

Production Status

After project instruments have been created and tested, the project should be moved to production status. Note that, once a project is in production, a REDCap administrator will need to approve any further edits.

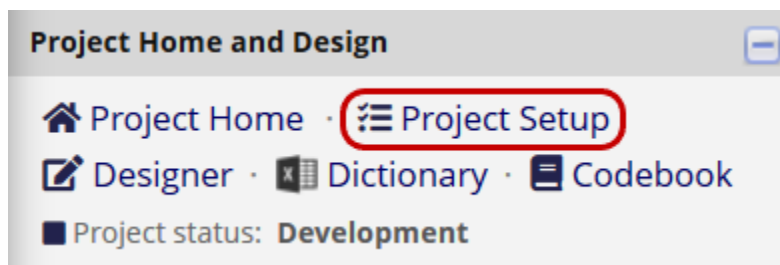
If changes do not cause any critical issues for existing data, they should be approved automatically. You will receive an email notification when changes have been approved.

Other changes, like changing field options or deleting a field, may cause critical issues for existing data. This kind of change will not be approved automatically while in production status. Instead, a REDCap administrator will contact you via email to confirm the revision. This process takes up to one business day.

Move Project to Production Status

Initiate the move to production status. Keep all records that were created while in development status.

- Open Project Setup.



- At the bottom of the page, click Move project to production.



Not started

Move your project to production status

Move the project to production status so that real data may be collected. Once in production, you will not be able to edit the project fields in real time anymore. However, you can make edits in Draft Mode, which will be auto-approved or else might need to be approved by a REDCap administrator before taking effect.

Go to

3. Read the notice and click I Agree.

10. If using scheduling in REDCap, make sure to define scheduling prototypes.

11. Test that any other functionality expected works correctly.

If changes are needed to a database in production, you will have to place it in "draft" to make changes, which will then have to be approved by REDCap administrators. Such requests may require a 24 hour approval period during regular university workdays.

Cancel

I Agree

4. Select Keep ALL data saved so far. Click YES, Move to Production Status.

Move Project To Production Status?



Are you sure you wish to leave the DEVELOPMENT stage? If you proceed, the project will be moved to PRODUCTION status so that real data may be collected. If you select the 'Delete ALL data' option below, all current collected data, calendar events, and uploaded documents will be deleted, otherwise all will remain untouched as the project is moved to production.

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

Keep existing data or delete?

Keep ALL data saved so far. (2 records)

Delete ALL data, calendar events, documents uploaded for records/responses, survey responses (if applicable), and any logging events pertaining to data collection.

Once in production, you will not be able to edit the project fields in real time anymore. However, you can make edits in Draft Mode, which will be auto-approved or else might need to be approved by a REDCap administrator before taking effect.

YES, Move to Production Status

Cancel

Make Changes in Production Status

Enter draft mode.

1. Open the Online Designer.



2. Read the notice and then click Enter Draft Mode.

NOTE: The project is currently in PRODUCTION status, and thus changes cannot be made in real time to the project as when in Development status. However, changes to the project may be drafted in DRAFT MODE, after which such changes will be reviewed and approved by a REDCap administrator. Once those changes are approved, you will then receive an email confirmation informing you that those changes have taken effect on your production project.

Would you like to enter DRAFT MODE to begin drafting changes to the project?

Enter Draft Mode

Add a field to a data collection instrument. Submit the changes for review by a REDCap administrator.

1. Open one of the existing instruments and add a new field.
2. Click Submit Changes for Review.

Since this project is currently in PRODUCTION, changes will not be made in real time. [Tell me more](#)

Submit Changes for Review

Fields to be added: 0 / Total resulting field count: 8

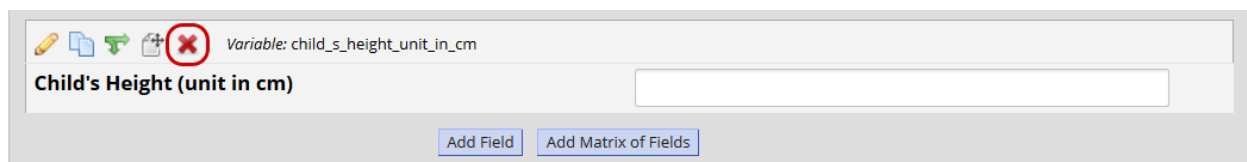
Fields to be deleted: 0 / Existing field count: 8

[Remove all drafted changes](#)

[View detailed summary of all drafted changes](#)

Delete a field from one of the forms.

1. Open one of the existing instruments for editing.
2. Delete a field by clicking the red X above the field name.



3. Confirm by clicking Delete.

DELETE FIELD?

Are you sure you wish to delete the field "height"?

Delete

Cancel

View the draft changes without submitting.

1. Click View detailed summary of all drafted changes.

Since this project is currently in **PRODUCTION**, changes will not be made in real time. [Tell me more](#)

Submit Changes for Review

Fields to be added: **0** / Total resulting field count: **8**
Fields to be deleted: **0** / Existing field count: **8**

[Remove all drafted changes](#) [View detailed summary of all drafted changes](#)

2. Notice the potentially critical issues that will occur if this field is deleted.

Details regarding all changes made in Draft Mode:

- Records in project: **2**
- Fields to be added: **1**
- Fields to be modified: **0**
- **Total potentially critical issues: 1**
 - Deleted fields that contain data: **1**
 - Potentially critical issues in modified fields that contain data: **0**
- Total field count BEFORE the changes below are committed: **8**
- Total field count AFTER the changes below are committed: **8**
- **Will these changes be automatically approved? No, an admin will have to review these changes.** ([Administrators: Change how this works](#))

Copy the Project

Make a duplicate of the current project named “[your name]_Test [date]_v2.”

1. On the left menu under Project Home and Design, click Project Home.

Project Home and Design

[Project Home](#) · [Project Setup](#)

[Designer](#) · [Dictionary](#) · [Codebook](#)

Project status: **Development**

2. Click on the “Other Functionality” tab.

[Project Home](#) [Project Setup](#) [Other Functionality](#) [Project Revision History](#) [Edit project settings](#)

3. Click Copy the project.

Copy or Back Up the Project

[Copy the Project](#)

Make an exact duplicate of this project. All project fields will be copied over, and you will be prompted to set the title and info for the new project. You may choose to copy or not copy the existing data in the current project to the new one.

4. Edit the project name. Review other options without making changes. Click Copy Project.

Copy the Project

To make an exact duplicate of the current project ("REDCap Tutorial Practice _ HK"), set the details below for the new project you are creating, and click the button at the bottom. This will copy over all project forms and their fields, and optionally, you may also copy the current users and any reports that have been created.

Project title:

Project's purpose:

How will it be used?

Project notes (optional):

Description of the project's use or purpose (displayed on the My Projects page)

Survey Notice:

Please be aware that if you select to copy all records below, the survey completion time for any survey responses will not be copied with the normal project data. This is because the survey completion times are considered a form of logging, and because a project's logging is never copied when copying a project, the survey completion times are also not copied.

Additionally, since your project contains one or more surveys, please note that although you may change the project title above for your new project, all survey settings (including the survey title) for each survey will be copied and remain as-is in the copied project. If want to change your survey titles, survey instructions, or other settings after copying this project, you are welcome to do so on the Online Designer page using the Survey Settings button for each data collection instrument.

The titles of your surveys are listed below:

- Eligibility Questionnaire
- Follow-up Questionnaire

Also copy the following:
(optional)

- All records (14 records total)
- Users and their user rights (including data access groups and assignments)
- User roles
- Custom record status dashboards
- Reports
- Report folders
- Project dashboards
- Project Dashboard Folders
- Data quality rules
- Alerts & Notifications
- Note: Alerts & Notifications will all be set to 'Deactivated' status in the new project.
- Project bookmarks
- Project folders to which this project is assigned
- Survey Queue and Automated Survey Invitation settings
- Note: Automated Invitations will all be set to 'Not Active' status in the new project.
- External Module configuration settings (modules will be disabled by default)
- Form Display Logic settings
- Multi-Language Management translations
- MyCap Mobile App
- Note: All settings for the MyCap Mobile App will be copied to the new project (including App Design settings and Task settings; excluding messages and sync issues). A new configuration will automatically be published in the new project as version 0.

[Select All](#) | [Deselect All](#)

Note the structure and status of the duplicate project.

1. Open the "Other Functionality" tab.

- The new project should be an exact copy of the original. However, the new project is still in development status, regardless of the status of the original.

Jane Doe_Test_11/20/2019_v2

[Project Home](#)
[Project Setup](#)
[Other Functionality](#)
[Project Revision History](#)
[Edit project settings](#)

Project status: [Development](#)

Completed steps **0** of **8**

Delete the Project

Initiate deletion of the project.

- Open the “Other Functionality” tab.
- Click Delete the project.

[Project Home](#)
[Project Setup](#)
[Other Functionality](#)
[Project Revision History](#)
[Edit Project Settings](#)

Project Status Management



[Mark project as Completed](#)

If you are finished with a project and wish to make it completely inaccessible, you may mark the project as 'Completed'. Doing so will take it offline and remove it from everyone's project list, after which it can only be seen again by clicking the *Show Completed Projects* link at the bottom of the *My Projects* page. [Read more](#)

Data Management

[Delete the project](#)

You may completely remove this project, in which all its data will be permanently deleted also.

[Erase all data](#)

You may erase all currently collected data in the project (including any survey responses), calendar events, documents uploaded onto forms/surveys, and all archived data export files stored in the File Repository, and any logged events that pertain to data collection.

[Clear all record & page caches](#)

(Administrators only) If there appear to be records missing from the project or if some pages are not getting recent updates to data (in reports, record status dashboards, or elsewhere), then the Record List Cache (a secondary list of all record names) or Rapid Retrieval (a page-level caching mechanism) might be out of sync and thus might need to be cleared. Clearing these will cause the Record List Cache to regenerate and will clear all page-level caches in the project. (NOTE: This is normally not needed.)

Data Collection Instruments

Use the fields in the tables below to create the two data collection instruments:

1. Eligibility Questionnaire
2. Follow-up Questionnaire

For guidance on creating each question, see see below.

Eligibility Questionnaire

Field	Field Type	Notes
1. Record ID	Text Box	Validation: "Integer"
2. Child's First Name	Text Box	
3. Child's Last Name	Text Box	
4. Parent's Email	Text Box	Validation: "Email"
5. Screening Date	Text Box	Validation: "Date (M-D-Y)"
6. Child's Date of Birth	Text Box	Validation: "Date (M-D-Y)"
7. Child's Age	Calculated Field	Write an equation that calculates the child's age from Screening Date and Child's Date of Birth.
8. English Fluency (Understood/Spoken)	Yes-No	
9. Ethnicity	Multiple Choice - Radio Buttons (Single Answer)	Options: 1) Hispanic; 2) Non-Hispanic; 9) Other
10. Specify Ethnicity	Text Box	Use branching logic to make this field available when Ethnicity = "Other"
11. Child's Height (unit in cm)	Text Box	Validation: "Number"
12. Child's Weight (unit in kg)	Text Box	Validation: "Integer"
13. BMI	Calculated Field	Write an equation that calculates BMI from Child's Height and Child's Weight.
14. Are you the parent or legal guardian of [Child's First Name]?	Multiple Choice - Radio Buttons (Single Answer)	Options: 1) Yes; 0) No (Ineligible). Use piping to display Child's First Name in the question text.
15. Sorry, you're not eligible.	Descriptive Text	Use branching logic to show this text when ineligible answers are selected for questions 14.
16. Thanks. You're eligible to participate in our research study.	Descriptive Text	Use branching logic to show this text when eligible answers are selected for questions 14. Use HTML to make text larger and in the color red (e.g., text!)

Field Properties

1. Record ID Each field will need a variable name. We highly recommend that you create a short variable name for each field, rather than allowing auto-naming, as shorter names will be easier to use in branching logic, piping, and exported datasets.

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 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 ?

Record ID

NOTE: This field is the record ID field, which is the first field in the project. This field is special because it is used to store the names of the records in your project. Thus the record ID field cannot be deleted or moved but only edited. If you wish, you may change its field label or even its variable name.

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](#)

Validation? (optional)

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

Field Note (optional)
Small reminder text displayed underneath field

Action Tags / Field Annotation (optional)

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

2. Child's First Name If any field contains identifying information such as name, SSN, or address, mark it as an identifier.

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

Field Label Use the Rich Text Editor ?

Child's First Name

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](#)

Validation? (optional)

-- or --

Required?* No Yes
* Prompt if field is blank

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

3. Child's Last Name If any field contains identifying information such as name, SSN, or address, mark it as an identifier.

Field Type: Text Box (Short Text, Number, Date/Time, ...) ▾

Field Label Use the Rich Text Editor ?

Child's Last Name

Action Tags / Field Annotation (optional)

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

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

lastname 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)?

4. Parent's Email Select "Email" as the validation option.

Field Type: Text Box (Short Text, Number, Date/Time, ...) ▾

Field Label Use the Rich Text Editor ?

Parent's Email

Action Tags / Field Annotation (optional)

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

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) Email ▾

– 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)?

5. Screening Date Select "Date (M-D-Y)" as the validation option.

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

Field Label Use the Rich Text Editor ?

Screening Date

Action Tags / Field Annotation (optional)

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

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

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

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

Validation? (optional) Date (M-D-Y)

Minimum:

Maximum:

– 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)?

6. Child’s Date of Birth Select “Date (M-D-Y)” as the validation option.

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

Field Label Use the Rich Text Editor ?

Child’s Date of Birth

Action Tags / Field Annotation (optional)

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

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

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

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

Validation? (optional) Date (M-D-Y)

Minimum:

Maximum:

– 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)?

7. Child’s Age This field can be calculated with an equation of the form `rounddown(datediff([dob],[screen_date],"y"),"` Be sure to use the correct variable names for date of birth and screening date. For more information about calculated fields, click ‘How do I format the equation?’

Field Type: Calculated Field

Field Label Use the Rich Text Editor ?

Child's Age

Calculation Equation [How do I format the equation?](#)
`rounddown(datediff([dob],[screen_date],"y","mdy",true))`

Variable Name (utilized in logic, calcs, and exports)
 age 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 Right / Vertical (RV)
Align the position of the field on the page

Field Note (optional)
Small reminder text displayed underneath field

8. English Fluency (Understood/Spoken) Define this question with the built-in Yes-No field type.

Field Type: Yes - No

Field Label Use the Rich Text Editor ?

English Fluency (Understood/Spoken)

Choices (not modifiable)

1, Yes
0, No

Variable Name (utilized in logic, calcs, and exports)
 english 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 Right / Vertical (RV)
Align the position of the field on the page

Field Note (optional)
Small reminder text displayed underneath field

9. Ethnicity Each choice must consist of a numeric code, a comma separator (","), and a text label.

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

Field Label Use the Rich Text Editor ?

Ethnicity

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

1, Hispanic
2, Non-Hispanic
9, Other

Variable Name (utilized in logic, calcs, and exports)
 ethn 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 Right / Vertical (RV)
Align the position of the field on the page

Field Note (optional)
Small reminder text displayed underneath field

10. Specify Ethnicity Use branching logic to make this field available when Ethnicity = "Other."

Field Type: Text Box (Short Text, Number, Date/Time, ...) ▾

Field Label Use the Rich Text Editor ?

Specify Ethnicity

Action Tags / Field Annotation (optional)

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

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

ethn_oth 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)?

- a. To define branching logic, click the green arrows above the question text.

 Variable: ethn_oth

Specify Ethnicity

- b. Define branching logic by entering the syntax manually or using the Drag-N-Drop Logic Builder. The logic should ensure the field is only visible when the Ethnicity variable ('ethn') is equal to 'Other' (coded as 9).

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: **ethn_oth - Specify Ethnicity**

Advanced Branching Logic Syntax

How to use [Branching Logic](#) [Smart Variables](#)

Show the field ONLY if...

[ethn] = '9'

[Clear logic](#)

Test logic with a record: -- select record -- v

— OR —

Drag-N-Drop Logic Builder

Displaying field choices for the following data collection instrument:
Eligibility Questionnaire v

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

ethn = Hispanic (1)

ethn = Non-Hispanic (2)

ethn = Other (9)

eligibility_questionnaire_complete = Incomplete (0)

eligibility_questionnaire_complete = Unverified

Drag
and
Drop

Show the field ONLY if...

ALL below are true

ANY below are true

Save Cancel

11. Child's Height (unit in cm) Select 'Number' as the validation option.

Field Type: Text Box (Short Text, Number, Date/Time, ...) ▾

Field Label Use the Rich Text Editor ?

Child's Height (unit in cm)

Action Tags / Field Annotation (optional)

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

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

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

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

Validation? (optional) Number ▾

Minimum:

Maximum:

– 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)?

12. Child's Weight (unit in kg) Select 'Integer' as the validation option.

Field Type: Text Box (Short Text, Number, Date/Time, ...) ▾

Field Label Use the Rich Text Editor ?

Child's Weight (unit in kg)

Action Tags / Field Annotation (optional)

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

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

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

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

Validation? (optional) Integer ▾

Minimum:

Maximum:

– 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)?

13. BMI This field can be calculated with an equation of the form $[weight] / (([height]/100) * ([height]/100))$. Be sure to use the correct variable names for weight and height.

Field Type: Calculated Field

Field Label Use the Rich Text Editor ?

BMI

Calculation Equation [How do I format the equation?](#)

$$[\text{weight}] / ([\text{height}] / 100) * ([\text{height}] / 100)$$

Variable Name (utilized in logic, calcs, and exports)
 bmi 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 Right / Vertical (RV)
Align the position of the field on the page

Field Note (optional)
Small reminder text displayed underneath field

14. Are you the parent or legal guardian of [Child’s First Name]? Use piping and the variable name (firstname) to reference the text entered in the Child’s First Name field. For more information about piping, click the purple Piping button. Note that the “Yes-No” field type would also work for this question.

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

Field Label Use the Rich Text Editor ?

Are you the parent or legal guardian of [firstname]?

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

1, Yes
 0, No (Ineligible)

Variable Name (utilized in logic, calcs, and exports)
 parent_yn 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 Right / Vertical (RV)
Align the position of the field on the page

Field Note (optional)
Small reminder text displayed underneath field

15. Sorry, you’re not eligible. Use branching logic to display this text if the question 14 was answered No.

Field Type: Descriptive Text (with optional Image/Video/A ▼)

Field Label ☐ Use the Rich Text Editor ?

Sorry, you're not eligible.

Action Tags / Field Annotation (optional)

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

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

sorry ☐ Enable auto naming of variable based upon its Field Label?

ONLY letters, numbers, and underscores

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

Optional file attachment, image, audio, or video:

Embed an external video (provide video URL) ?

e.g. <https://youtube.com/watch?v=E1cCuWMupz0>, <https://vimeo.com/62730281>, <http://example.com/movie.mp4>

Display format of video: Inline Inside popup

– or –

Attach an image, file, or embedded audio

[Upload file](#)

Display format of attachment on page:

Link

Inline image

Audio file (play in embedded player on page)

[Compatibility notice for embedded audio](#)

(Images wider than 600 pixels will be downsized to fit page.)

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: **you_re_not_eligible - Sorry, you're not eligible for...**

Advanced Branching Logic Syntax How to use [Branching Logic](#) [Smart Variables](#) [Special Functions](#)

Show the field ONLY if...

Test logic with a record:

[Clear logic](#)

– OR –

Drag-N-Drop Logic Builder

Displaying field choices for the following data collection instrument:
[Eligibility Questionnaire ▼]

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

- height = (define criteria)
- weight = (define criteria)
- bmi = (define criteria)
- guardian = Yes (1)
- guardian = No (ineligible) (0)
- eligibility_questionnaire_complete = Incomplete (0)
- eligibility_questionnaire_complete = finished (1)

Show the field ONLY if...

ALL below are true

ANY below are true

guardian = No (ineligible) (0) ✕

[Clear logic](#)

16. Thanks. You're eligible to participate in our research study.

- a. Use branching logic to display this text only when question 14 is answered Yes.

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: **you_re_eligible - Thanks! You're eligible to particip...**

Advanced Branching Logic Syntax How to use [Branching Logic](#) [Smart Variables](#) [Special Functions](#)

Show the field ONLY if...

[guardian] = '1'

Test logic with a record: -- select a record --

— OR —

Drag-N-Drop Logic Builder

Displaying field choices for the following data collection instrument:
[Eligibility Questionnaire]

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

- bmi = (define criteria)
- guardian = Yes (1)
- guardian = No (ineligible) (0)
- eligibility_questionnaire_complete = Incomplete (0)
- eligibility_questionnaire_complete = Unfinished (1)
- eligibility_questionnaire_complete = Complete (2)

Drag and Drop

Show the field ONLY if...

ALL below are true
 ANY below are true

guardian = Yes (1) **X**

[Clear Logic](#)

b. You can use HTML syntax or the Rich Text Editor to change font size, color, and formatting.

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

`Thanks. You're eligible to participate in our research study.`

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

Paragraph **B** *I*

A A `<>` *I*_x

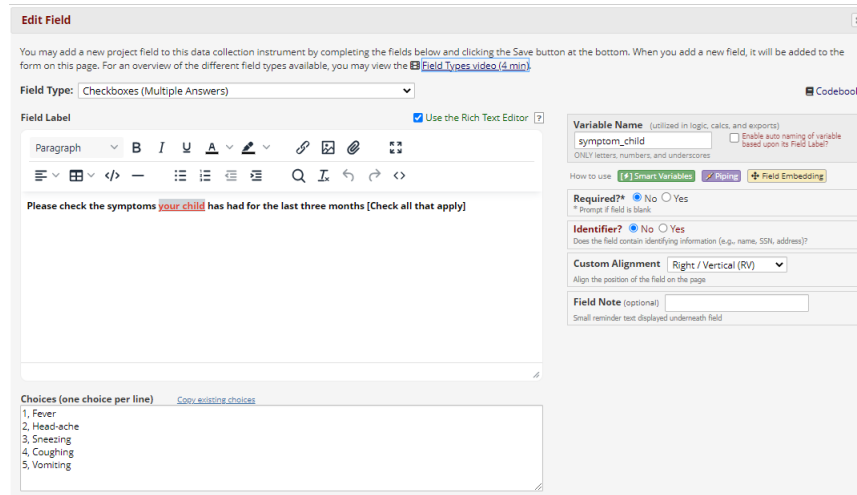
Thanks. You're eligible to participate in our research study.

Follow-up Questionnaire

Field	Field Type	Response Options
1. Please check the symptoms your child has had for the last three months [Check all that apply]	Checkboxes(Multiple Answers)	1, Fever 2, Head-ache 3, Sneezing 4, Coughing 5, Vomiting
2. How often did you feel overwhelmed or depressed by your child’s symptoms?	Radio-buttons(Single Answer)	4, Almost always 3, Quite often 2, Sometimes 1, Rarely or Never

Field Properties

1. Please check the symptoms your child has had for the last three months [Check all that apply]
 Allow users to select multiple options. Note that exported data will include an auto-generated dummy variable for each checkbox option. Branching logic based on checkboxes takes the form `[symptom_child(1)]= '1'`.



2. How often did you feel overwhelmed or depressed by your child’s symptoms? Allow users to select only one option. Assign option codes that match your needs during analysis. In the example, a larger number corresponds to a more negative emotional status.

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 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: Multiple Choice - Radio Buttons (Single Answer) Codebook

Field Label Use the Rich Text Editor ?

Paragraph B I U A

How often did you feel overwhelmed or depressed by your child's symptoms?

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

4, Almost always
 3, Quite often
 2, Sometimes
 1, Rarely or Never

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

symptom_parent 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: Right / Vertical (RV)
Align the position of the field on the page

Field Note (optional)
Small reminder text displayed underneath field