# Statistically Speaking Lecture Series

Sponsored by the Biostatistics Collaboration Center

## *Seeing RED: Designing REDCap Databases to Avoid Common Pitfalls*
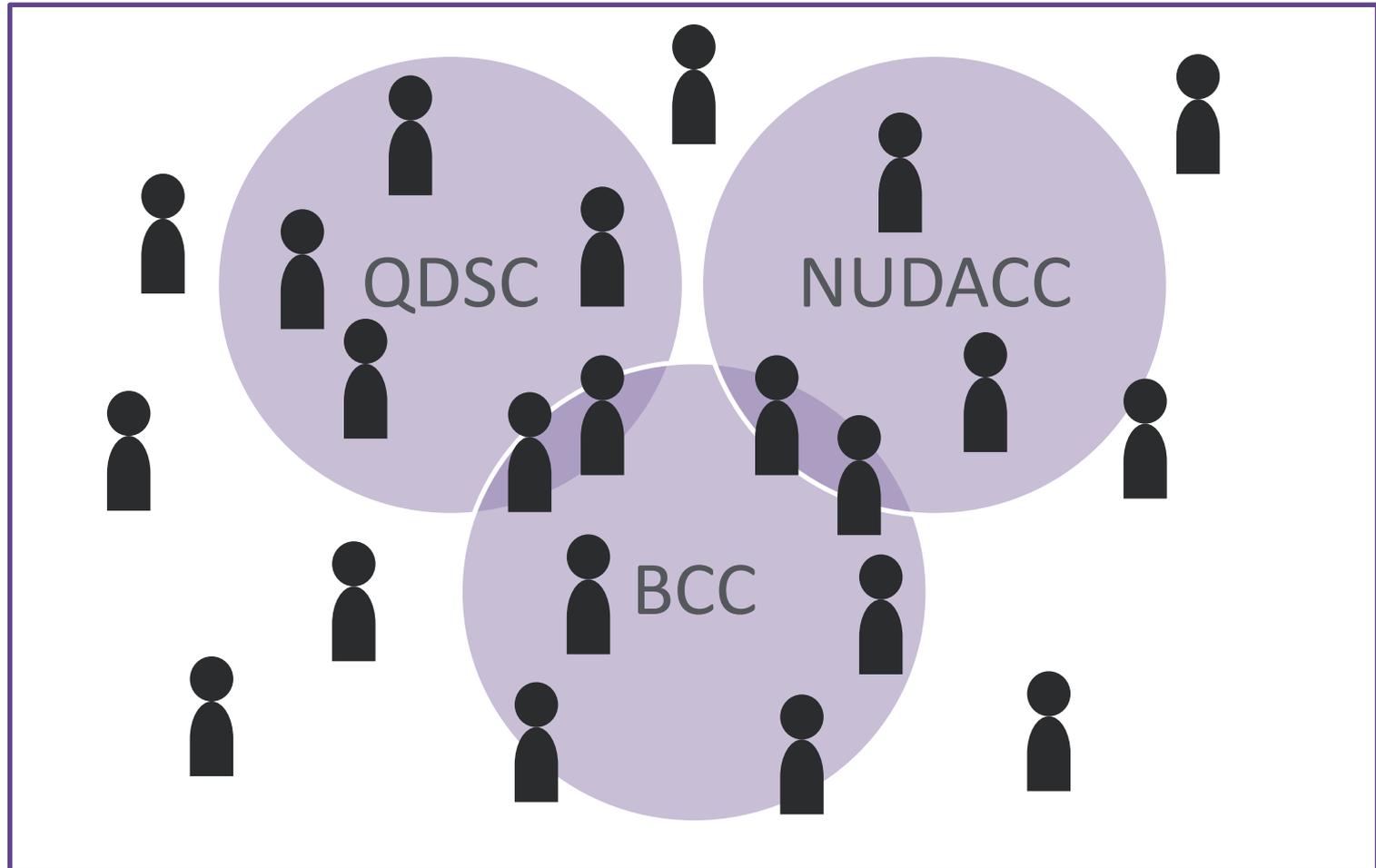
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Department of Preventive Medicine – Biostatistics and Informatics

# Biostatistics at NU
## Overview

Division of Biostatistics (Chief: Denise Scholtens),
Department of Preventive Medicine (Chair: Mercedes Carnethon)

# Biostatistics Centers and Cores
## Overview

**Biostatistics Collaboration Center (BCC)**
- Supports **non-cancer** research at NU
- Initial 1-2 hour consultation subsidized by FSM Research Office
- Grant, Hourly
- https://www.feinberg.northwestern.edu/sites/bcc/

**Quantitative Data Sciences Core (QDSC)**
- Supports **cancer-related** research at NU
- Free to Lurie Cancer Center (LCC) members
- Grant
- https://www.cancer.northwestern.edu/research/shared-resources/quantitative-data-sciences.html

**Northwestern University Data Analysis and Coordinating Center (NUDACC)**
- Prospective, large **multicenter research**
- Comprehensive support (e.g., clinical monitoring, data analysis, project management)
- Grant
- https://www.feinberg.northwestern.edu/sites/nudacc/

# Outline

1. Free text

2. Longitudinal data collection

3. Surveys

4. Questions/Discussion

Free Text

# Free Text

**Date of Birth**

# Free Text

**Date of Birth**

2/24/26

2/24/2026

02/24/2026

2-24-26

Feb 24 2026

Feb 24th 2026

2026-24-02

2026 24 2

Etc...

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# Free Text

**Date of Birth**

mm/dd/yyyy

2/24/26

2/24/2026

02/24/2026

2-24-26

Feb 24 2026

Feb 24th 2026

2026-24-02

2026 24 2

Etc...

# Free Text

**Date of Birth** 💬 [_____] 📅 [Today] M-D-Y

---

### 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.

**Field Type:** [Text Box (Short Text, Number, Date/Time, ...)    ▼]                    📓 Codebook

**Question Number** (optional)     [_____]
Displayed only on the survey page

**Field Label**                                           ☐ Use the Rich Text Editor [?]

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

How to use  [[⚡] Smart Variables]  [✏ Piping]  [✛ Field Embedding]

**Validation?** (optional)   [Date (M-D-Y)                    ▼]

**Minimum:** [01-01-1900]

**Maximum:** [[today]]

💡 **Tip for min/max limits:** You may pipe a value from another field to set dynamic range limits - e.g., [visit_date] or [event_1_arm_1][age]. You may also use the word today or now (not wrapped in quotes) for date/time fields.

– 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 ]

# Free Text

| Date of Birth | | | | M-D-Y |
|---|---|---|---|---|

**Date of Birth**

| Feb | 2026 |
|---|---|

| Su | Mo | Tu | We | Th | Fr | Sa |
|---|---|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| 8 | 9 | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |

**Form Status**

**Complete?**

Today   M-D-Y

If you try to enter the wrong format:

**Date of Birth**    2026-24-2    Today   M-D-Y

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# Free Text

| | | | | |
|---|---|---|---|---|
| **Date of Birth** | 💬 | [          ] | 📅 | Today   M-D-Y |

| | | | | |
|---|---|---|---|---|
| **Date of Birth** | Ⓗ 💬 | [          ] | 📅 | Today   M-D-Y |
| **Form Status** | | | | |
| **Complete?** | Ⓗ 💬 | | | |

| ◀ | Feb ⇅ | 2026 ⇅ | ▶ |
|---|---|---|---|

| Su | Mo | Tu | We | Th | Fr | Sa |
|----|----|----|----|----|----|----|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| 8 | 9 | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |

## If you try to enter the wrong format:

**Date of Birth**

**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)

Close

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# Free Text

| | A | B | C |
|---|---|---|---|
| 1 | record_id | dob_free_text | dob_validated |
| 2 | 1 | Feb 24 2026 | 2/24/26 |
| 3 | 2 | 6/10/95 | 6/10/95 |
| 4 | 3 | 10/3/84 | 10/3/84 |
| 5 | 4 | 3/21/73 | 3/21/73 |
| 6 | 5 | may 10 2001 | 5/10/01 |
| 7 | | | |

# Free Text

| | A | B |
|---|---|---|
| 1 | record_id | years_of_education |
| 2 | 1 | 12 |
| 3 | 2 | High School |
| 4 | 3 | hs |
| 5 | 4 | some college |
| 6 | 5 | 14 |
| 7 | 6 | none |
| 8 | 7 | 8th grade |
| 9 | 8 | masters |
| 10 | 9 | 16 |
| 11 | 10 | 13 |

# Free Text

| Years of education | 8th grade |
|---|---|

# Free Text

| Years of education | | 8th grade |
|---|---|---|
| Years of education | | 8th grade |

# Free Text

| | | |
|---|---|---|
| **Years of education** | (H) 💬 | 8th grade |

**Years of education**

## Alert ✖

This value you provided is not a number. Please try again.

Close

# Free Text

**Years of education**                      8th grade

**Years of education**

## Alert                                          ✖

This value you provided is not a number. Please try again.

Close

**Years of education**

# Free Text

**Years of education**                                                   8th grade

**Years of education**

## Alert                                                            ✖

This value you provided is not a number. Please try again.

Close

**Years of education**

✓

None
Some elementary school
Elementary school
Some middle school
Middle school
Some high school
High school
Some college
College
Graduate school

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# Free Text

| | A | B | C |
|---|---|---|---|
| 1 | record_id | years_of_education | years_of_education_drop |
| 2 | 1 | 12 | High school |
| 3 | 2 | High School | High school |
| 4 | 3 | hs | High school |
| 5 | 4 | some college | Some college |
| 6 | 5 | 14 | Some college |
| 7 | 6 | none | None |
| 8 | 7 | 8th grade | Middle school |
| 9 | 8 | masters | Graduate School |
| 10 | 9 | 16 | College |
| 11 | 10 | 13 | Some college |

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# Longitudinal Data Collection

# Longitudinal Data

- Way the computer understands longitudinal data and the way we understand it are not the same

- Intuitive for us:

| record_id | date_ | sys_bp | dia_bp | date_2 | sys_bp_2 | dia_bp_2 | date_3 | sys_bp_3 | dia_bp_3 |
|---|---|---|---|---|---|---|---|---|---|
| 1 | 1/10/26 | 121 | 80 | 1/30/26 | 125 | 82 | 2/16/26 | 122 | 75 |
| 2 | 11/7/25 | 115 | 72 | 1/2/26 | 112 | 77 | 2/4/26 | 114 | 80 |
| 3 | 8/1/25 | 140 | 91 | 9/2/25 | 142 | 92 | 12/20/25 | 150 | 95 |

- Interpretable by a computer:

| record_id | date | sys_bp | dia_bp |
|---|---|---|---|
| 1 | 1/10/26 | 121 | 80 |
| 1 | 1/30/26 | 125 | 82 |
| 1 | 2/16/26 | 122 | 75 |
| 2 | 11/7/25 | 115 | 72 |
| 2 | 1/2/26 | 112 | 77 |
| 2 | 2/4/26 | 114 | 80 |
| 3 | 8/1/25 | 140 | 91 |
| 3 | 9/2/25 | 142 | 92 |
| 3 | 12/20/25 | 150 | 95 |

- Want to create database that exports in computer format

# Longitudinal Data: Method 1

# Longitudinal Data: Method 1

Current instrument: **Study Visit 1**
Form name: study_visit_1

Add custom CSS styling  [?]

| Add Field | Add Matrix of Fields | Import from Field Bank |

*Field Name:* date ☐

**Date**
* must provide value
[          ] [📅] [ Today ]  M-D-Y

Validation type: Date (M-D-Y)

| Add Field | Add Matrix of Fields | Import from Field Bank |

*Field Name:* sys_bp ☐

**Systolic BP**
* must provide value
[                                    ]

Validation type: Integer

| Add Field | Add Matrix of Fields | Import from Field Bank |

*Field Name:* dia_bp ☐

**Diastolic BP**
* must provide value
[                                    ]

Validation type: Integer

| Add Field | Add Matrix of Fields | Import from Field Bank |

# Longitudinal Data: Method 1

# Longitudinal Data: Method 1

- REDCap treats each unique variable name as a distinct column in data export

| record_id | date_ | sys_bp | dia_bp |
|---|---|---|---|
| 1 | 1/10/26 | 121 | 80 |
| 2 | 11/7/25 | 115 | 72 |
| 3 | 8/1/25 | 140 | 91 |

| record_id | date_ | sys_bp | dia_bp | date_2 | sys_bp_2 | dia_bp_2 |
|---|---|---|---|---|---|---|
| 1 | 1/10/26 | 121 | 80 | 1/30/26 | 125 | 82 |
| 2 | 11/7/25 | 115 | 72 | 1/2/26 | 112 | 77 |
| 3 | 8/1/25 | 140 | 91 | 9/2/25 | 142 | 92 |

| record_id | date_ | sys_bp | dia_bp | date_2 | sys_bp_2 | dia_bp_2 | date_3 | sys_bp_3 | dia_bp_3 |
|---|---|---|---|---|---|---|---|---|---|
| 1 | 1/10/26 | 121 | 80 | 1/30/26 | 125 | 82 | 2/16/26 | 122 | 75 |
| 2 | 11/7/25 | 115 | 72 | 1/2/26 | 112 | 77 | 2/4/26 | 114 | 80 |
| 3 | 8/1/25 | 140 | 91 | 9/2/25 | 142 | 92 | 12/20/25 | 150 | 95 |

# Longitudinal Data: Method 2

- Use REDCap events!

**Statistically Speaking Database**   PID 607

| Project Home | **Project Setup** | Other Functionality | Project Revision History |
|---|---|---|---|

**Project status:**   Development

Completed steps **0** of **7**

---

**Main project settings**

❌ Not started

[I'm done!]

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

[Enable]   Use longitudinal data collection with defined events? [?]

[Enable]   Use the MyCap participant-facing mobile app?   Learn more about MyCap

[Modify project title, purpose, etc.]

---

**Design your data collection instruments**

❌ Not started

[I'm done!]

Add or edit fields on your data collection instruments. This may be done by either using the Online Designer (online method) or by uploading a Data Dictionary (offline method). Quick links: Download PDF of all instruments OR Download the current Data Dictionary

Go to   [Online Designer]   or   [x Data Dictionary]        Explore the   [REDCap Instrument Library]

Have you checked the Check For Identifiers page to ensure all identifier fields have been tagged?

Learn how to use   [ [   ] Smart Variables ]   [🔧 Piping ]   [@ Action Tags ]   [ Field Embedding ]   [ Special Functions ]

# Longitudinal Data: Method 2

# Longitudinal Data: Method 2

| Arm 1: Arm 1 | +Add New Arm |
|---|---|

Arm name: **Arm 1**

Rename Arm 1

| | | Event #<br>[event-number] | Event Label<br>[event-label] | Custom Event Label<br>(optional) | Unique event name<br>(auto-generated)<br>[event-name] | Event ID<br>(auto-generated,<br>unchangeable)<br>[event-id] |
|---|---|---|---|---|---|---|
| | ✏️ | 1 | Event 1 | | event_1_arm_1 | 1862 |
| | Add new event | | _Descriptive name for this event_ | _Custom Event Label (optional)_<br><br>**Example:** [visit_date], [weight] kg | | |

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# Longitudinal Data: Method 2

**Arm 1:** Arm 1    +Add New Arm

Arm name: **Arm 1**                                                                  Rename Arm 1

| | | Event #<br>[event-number] | Event Label<br>[event-label] | Custom Event Label<br>(optional) | Unique event name<br>(auto-generated)<br>[event-name] | Event ID<br>(auto-generated,<br>unchangeable)<br>[event-id] |
|---|---|---|---|---|---|---|
| ✏ | ✖ | 1 | Event 1 | | event_1_arm_1 | 1862 |
| ✏ | ✖ | 2 | Visit 1 | | visit_1_arm_1 | 2063 |
| ✏ | ✖ | 3 | Visit 2 | | visit_2_arm_1 | 2064 |
| ✏ | ✖ | 4 | Visit 3 | | visit_3_arm_1 | 2065 |
| Add new event | | | Descriptive name for this event | Custom Event Label (optional)<br>Example: [visit_date], [weight] kg | | |

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# Longitudinal Data: Method 2

**Statistically Speaking Database**  `PID 607`

| Project Home | **Project Setup** | Other Functionality | Project Revision History |
|---|---|---|---|

**Project status:**   Development                                             Completed steps **0** of **8**

### Main project settings

Not started

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

[ Disable ]   Use longitudinal data collection with defined events? [?]

[ Enable ]    Use the MyCap participant-facing mobile app?     [Learn more about MyCap](#)

[ I'm done! ]

[ Modify project title, purpose, etc. ]

### Design your data collection instruments

Not started

Add or edit fields on your data collection instruments. This may be done by either using the Online Designer (online method) or by uploading a Data Dictionary (offline method). Quick links: [Download PDF of all instruments](#) OR [Download the current Data Dictionary](#)

[ I'm done! ]

Go to [ Online Designer ] or [ ▓ Data Dictionary ]     Explore the [ REDCap Instrument Library ]

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

Learn how to use  [ [ ] Smart Variables ]  [ ✏ Piping ]  [ @ Action Tags ]  [ Field Embedding ]  [ Special Functions ]

### Define your events and designate instruments for them

In progress

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

[ I'm done! ]

Go to [ Define My Events ] or [ Designate Instruments for My Events ]

# Longitudinal Data: Method 2

**Statistically Speaking Database**  `PID 607`

VIDEO: How to designate instruments (3 min)

| 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

| Data Collection Instrument | Baseline (1) | Visit 1 (2) | Visit 2 (3) | Visit 3 (4) |
|---|---|---|---|---|
| Baseline | 🟩 | | | |
| Study Visit | ✔ | | | |

# Longitudinal Data: Method 2

**Statistically Speaking Database**  `PID 607`

| 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) | Visit 1 (2) | Visit 2 (3) | Visit 3 (4) |
|---|---|---|---|---|
| Baseline | ☐ 🟩 | ☐ | ☐ | ☐ |
| Study Visit | ☑ | ☐ | ☐ | ☐ |

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# Longitudinal Data: Method 2

**Statistically Speaking Database** `PID 607`

VIDEO: How to designate instruments (3 min)

| 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) | Visit 1 (2) | Visit 2 (3) | Visit 3 (4) |
|---|---|---|---|---|
| Baseline | ☑ 🟩 | ☐ | ☐ | ☐ |
| Study Visit | ☐ | ☑ | ☑ | ☑ |

# Longitudinal Data: Method 2

**Statistically Speaking Database**  `PID 607`

| 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

| Data Collection Instrument | Baseline (1) | Visit 1 (2) | Visit 2 (3) | Visit 3 (4) |
|---|---|---|---|---|
| Baseline | ✔ 🟢 | | | |
| Study Visit | | ✔ | ✔ | ✔ |

# Longitudinal Data: Method 2

## Statistically Speaking Database   `PID 607`

### 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. If you wish, you may modify the events below by navigating to the Define My Events page.

**Choose action for record** ▽

**Legend for status icons:**
- 🔴 Incomplete   ⚪ Incomplete (no data saved) [?]
- 🟡 Unverified   🟢🟡🔴 Many statuses (all same)
- 🟢 Complete   🔵 Many statuses (mixed)

⚠️ **NOTICE:** This project is for practice/testing purposes only. **Real data should NOT be entered**.

### Record ID **1**

| Data Collection Instrument | Baseline | Visit 1 | Visit 2 | Visit 3 |
|---|---|---|---|---|
| Baseline | 🔴 [+] | | | |
| Study Visit | | ⚪ | ⚪ | ⚪ |

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# Longitudinal Data: Method 2

| record_id | date | sys_bp | dia_bp |
|---:|---:|---:|---:|
| 1 | 1/10/26 | 121 | 80 |

| record_id | date | sys_bp | dia_bp |
|---:|---:|---:|---:|
| 1 | 1/10/26 | 121 | 80 |
| 1 | 1/30/26 | 125 | 82 |
| 1 | 2/16/26 | 122 | 75 |

| record_id | date | sys_bp | dia_bp |
|---:|---:|---:|---:|
| 1 | 1/10/26 | 121 | 80 |
| 1 | 1/30/26 | 125 | 82 |
| 1 | 2/16/26 | 122 | 75 |
| 2 | 11/7/25 | 115 | 72 |
| 2 | 1/2/26 | 112 | 77 |
| 2 | 2/4/26 | 114 | 80 |
| 3 | 8/1/25 | 140 | 91 |
| 3 | 9/2/25 | 142 | 92 |
| 3 | 12/20/25 | 150 | 95 |

Surveys

# Surveys

## Statistically Speaking Database  `PID 607`

| 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

| Data Collection Instrument | Baseline (1) | Visit 1 (2) | Visit 2 (3) | Visit 3 (4) |
|---|---|---|---|---|
| Baseline | ✔ 🟢 | | | |
| Study Visit | | ✔ | ✔ | ✔ |

# Surveys

# Surveys

# Surveys



**Statistically Speaking Database**  PID 607

🏠 **Project Home**   ☰ **Project Setup**   ⚙ **Other Functionality**   ↻ **Project Revision History**

**Project status:** 🔧 Development                    Completed steps **0** of **8**

**Main project settings**

| Not started | ✓ Use surveys in this project? [?] | 🎞 VIDEO: How to create and manage a survey |

Disable   ✓ Use surveys in this project? [?]        🎞 VIDEO: How to create and manage a survey
Disable   ✓ Use longitudinal data collection with defined events? [?]
Enable    ⛔ Use the MyCap participant-facing mobile app?   📱 Learn more about MyCap

Not started
I'm done!

Modify project title, purpose, etc.

# Surveys

## Statistically Speaking Database [PID 607]

| 🏠 Project Home | ☰ Project Setup | ✐ Online Designer | 📊 Data Dictionary | 📖 Codebook |

🎞 VIDEO: How to use this page      📷 Create snapshot of instruments      Last snapshot: never ?

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:**
- 📷 PDF Snapshots
- 🚫 Form Display Logic ▾
- ⬇ PDF (all instruments)
- 💬 Descriptive Popups

**Survey options:**
- 👥 e-Consent
- 🔑 Survey Login
- ☰ Survey Queue ▾
- 📧 Survey Notifications
- ⚙ Auto Invitation options ▾

+ 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 | PDF | Enabled as survey | Instrument actions | Survey related options |
|---|---|---|---|---|---|
| Baseline 🔄 | 7 | 📄 | Enable | Choose action ▽ | |
| Study Visit | 3 | 📄 | Enable | Choose action ▽ | |

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# Surveys

**Statistically Speaking Database** `PID 607`

**🏠 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 "**Baseline**"    [Save Changes] [Cancel]

**Survey Status** ✓    [Survey Active ⇕]    If offline, respondents will not be able take the survey.

Custom text to display on survey page when offline: [Add offline message]

**Basic Survey Options:**

🏷 **Survey Title**

Baseline

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

📄 **Survey Instructions**
*(Displayed at top of survey after title)*

| Open Sans ⌄ | Paragraph ⌄ | 10pt ⌄ | **B** | *I* | U̲ | S̶ | A ⌄ | ✎ ⌄ |

≡⌄  ☰  ☰  ◄  ►  ⊞⌄  </>  —  🔗  🖼  📎  ⤢  🔍  I̶ₓ  ↶  ↷  <>

**Please complete the survey below.**

Thank you!

🖊 How to use Piping here

# Surveys

**Statistically Speaking Database** `PID 607`

Actions: [✎ Modify instrument] [📄 Download PDF of instrument(s) ▽]   ▦ [Video: Basic data entry](#)

> ⚠ **NOTICE:** This project is for practice/testing purposes only. **Real data should NOT be entered.**

📄 **Baseline**

Current instance: #**1**  |  [ + Add new ]                    Invitation status: ✉  [🔒 Survey options ▽]

| ✎ Editing existing Record ID **1**. (Instance #1) | |
|---|---|
| Event: **Baseline** | |
| **Record ID** | 1 |
| **Date of Birth** | [        ] 📅 [ Today ]  M-D-Y |
| **Years of education** | [              ▼] |
| **Form Status** | |
| **Complete?** | [ Incomplete ▼ ] |
| | [Save & Exit Form] [Save & ... ▼] |
| | [ – Cancel – ] |

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# Surveys

# Surveys

**Send Survey Invitation to Participant "1"**                                    ✖

📄 **Info**
**Survey title:** Baseline
**Event:** Baseline

🕐 **When should this email be sent?**
🔘 Immediately
⚪ At specified time: [_____] 📅🕐 M-D-Y H:M
   The time must be for the time zone **US/Central**, in which the current time is **02-19-2026 15:02**.

📣 **Enable reminders**
☐ Re-send invitation as a reminder if participant has not responded by a specified time?

✉️ **Compose message**
From:  [Display name (optional) ▾]  [nathan.gill@northwestern.edu ▾]
       (select any project user to be the 'Sender')

To:    [_____]
       (NOTE: Any email address manually entered above will be used only this one time when sending an survey invitation. Any other invitations sent out at other times will instead go to the email address found in the Participant List for this participant.)

Subject: [_____]

                                                              Send test email

[Open Sans ▾] [Paragraph ▾] [10pt ▾]  **B** *I* U S̶ A ▾ ✏️ ▾

≡ ▾  ☰  ☷  ⬅  ➡  ▦ ▾  </>  —  🔗  🖼️  📎  ⛶  🔍  I𝗑  ↶  ↷  <>

Please take this survey.

You may open the survey in your web browser by clicking the link below:
[survey-link]

If the link above does not work, try copying the link below into your web browser:
[survey-url]

                              [Send Invitation]  [Cancel]

# Surveys

# Surveys

- May want to send survey based on condition being met

- E.g. a questionnaire for participants who respond "None" for years of education

- Possible to automate survey sending using logical conditions (basically the same as branching logic)

# Surveys

## Statistically Speaking Database  `PID 607`

**🏠 Project Home** | **📋 Project Setup** | **✏️ Online Designer** | **📊 Data Dictionary** | **📖 Codebook**

📽 VIDEO: How to use this page     📷 Create snapshot of instruments     Last snapshot: never ❓

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:
- 📷 PDF Snapshots
- 🚫 Form Display Logic ▾
- ⊕ PDF (all instruments)
- 💬 Descriptive Popups

Survey options:
- 👥 e-Consent
- 📋 Survey Queue ▾
- 🔑 Survey Login
- 💠 Survey Notifications
- ⚙️ Auto Invitation options ▾

➕ 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 | PDF | Enabled as survey | Instrument actions | Survey related options | |
|---|---|---|---|---|---|---|
| Baseline 🔄 | 7 | 📄 | 📋 | Choose action ▽ | Survey settings ✓ | + Automated Invitations |
| Study Visit | 3 | 📄 | Enable | Choose action ▽ | | |
| Questionnaire | 3 | 📄 | 📋 | Choose action ▽ | Survey settings | + Automated Invitations |

# Surveys



Define Conditions for Automated Survey Invitations (ASI)

In this pop-up you may define your conditions for automated survey invitations that will be sent out for the survey (and event, if a longitudinal project) listed in the Info box below. Tell me more

**⏻ Activate automated invitations for this survey?**

**Survey title:** "Questionnaire"
**Event:** Baseline

"Active" must be selected in order for automated survey invitations to be triggered and sent using the conditions specified in this popup. You may make it Not Active (and vice versa) at any point in the future. [?]

○ Active    ○ Not Active

**✉ STEP 1: Compose message**

From: [Display name (optional)] [nathan.gill@northwestern.edu ▾]
(select any project user to be the 'Sender')

To: **[All participants who meet the conditions defined]**

Subject: [                    ]

Send test email

| Open Sans ▾ | Paragraph ▾ | 10pt ▾ | **B** *I* U S̶ A ▾ | 🖊 ▾ |

Please take this survey.

You may open the survey in your web browser by clicking the link below:
[survey-link]

If the link above does not work, try copying the link below into your web browser:
[survey-url]

This link is unique to you and should not be forwarded to others.

💡 **NOTE:** You may modify or remove any text you wish in the Compose Message text box above. Make sure you include either [survey-link] or [survey-url] in the text or else the participant will not have a way to take the survey.

✏ How to use Piping in the survey invitation    ⓘ Reminder: Never pipe private info (e.g., PII, PHI) into emails.

**▼ STEP 2: Conditions**

**Specify conditions for sending invitations:**

☐ When the following survey is completed:
[--- select a survey --- ▾]

[AND ▾]

☐ When the following logic becomes true:
[                    ]
(e.g., [enrollment_arm_1][age] > 30 and [enrollment_arm_1][sex] = "1")

How do I use special functions?

Test logic with a record: [-- select a record -- ▾]

☐ Ensure logic is still true before sending invitation? [?]

📍 How to use "stop logic" to disable an automated invite

**⏱ STEP 3: When to send invitations AFTER conditions are met**

○ Send immediately

○ Send on next [-- select day -- ▾] at time [        ] 🕐 H:M

○ Send the invitation [    ] days [    ] hours [    ] minutes
[after ▾] [the exact time that the automated invitation was triggered ▾] [?]

○ Send at exact date/time: [        ] 📅🕐 M-D-Y H:M

**🔔 OPTIONAL: Enable reminders**

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

Save    Save & Copy to...    Cancel

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# Surveys



**Define Conditions for Automated Survey Invitations (ASI)**                                          ✖

In this pop-up you may define your conditions for automated survey invitations that will be sent out for the survey (and event, if a longitudinal project) listed in the Info box below. Tell me more

⏻ **Activate automated invitations for this survey?**

**Survey title:** "Questionnaire"
**Event:** Baseline

"Active" must be selected in order for automated survey invitations to be triggered and sent using the conditions specified in this popup. You may make it Not Active (and vice versa) at any point in the future. ?

○ Active   ○ Not Active

✉ **STEP 1: Compose message**

From:   [Display name (optional)]  [nathan.gill@northwestern.edu  ▲▼]
        (select any project user to be the 'Sender')

To:     **[All participants who meet the conditions defined]**

Subject: [                                              ]

Send test email

| Open Sans ⌄ | Paragraph ⌄ | 10pt ⌄ | **B** | *I* | U | S̶ | **A** ⌄ | ✎ ⌄ |

≡⌄  •≡  1≡  ←≡  →≡  ▦⌄  </>  —  🔗  🖼  📎  ⛶  🔍  I͟ₓ  ↶  ↷  <>

Please take this survey.

You may open the survey in your web browser by clicking the link below:
[survey-link]

If the link above does not work, try copying the link below into your web browser:
[survey-url]

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✎ How to use Piping in the survey invitation   ⓘ Reminder: Never pipe private info (e.g., PII, PHI) into emails.

▼ **STEP 2: Conditions**

**Specify conditions for sending invitations:**

☑ When the following survey is completed:
[ "Baseline" - Baseline                                    ▼ ]

[AND ⇅]

☑ When the following logic becomes true:
[years_of_education_drop] = "None"                        ]

(e.g., [enrollment_arm_1][age] > 30 and [enrollment_arm_1][sex] = "1")

How do I use special functions?

Test logic with a record:   [ -- select a record --  ⇅ ]

☐ Ensure logic is still true before sending invitation? ?

🔖 How to use "stop logic" to disable an automated invite

⏱ **STEP 3: When to send invitations AFTER conditions are met**

○ Send immediately

○ Send on next [ -- select day -- ⇅ ] at time [        ] 🕐 H:M

○ Send the invitation [    ] days [   ] hours [   ] minutes
   [ after ⇅ ] [ the exact time that the automated invitation was triggered ⇅ ] ?

○ Send at exact date/time: [                ] 📅🕐 M-D-Y H:M

🔔 **OPTIONAL: Enable reminders**

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

[ Save ]   [ Save & Copy to... ]   [ Cancel ]

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# Surveys

**Define Conditions for Automated Survey Invitations (ASI)** ✖

In this pop-up you may define your conditions for automated survey invitations that will be sent out for the survey (and event, if a longitudinal project) listed in the Info box below. Tell me more

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**Event:** Baseline

"Active" must be selected in order for automated survey invitations to be triggered and sent using the conditions specified in this popup. You may make it Not Active (and vice versa) at any point in the future. ❓

⚪ Active ⚪ Not Active

**✉ STEP 1: Compose message**

From: | Display name (optional) | nathan.gill@northwestern.edu ⇅
(select any project user to be the 'Sender')

To: **[All participants who meet the conditions defined]**

Subject: [                                                    ]

Send test email

| Open Sans ⌄ | Paragraph ⌄ | 10pt ⌄ | **B** *I* U S̶ A ⌄ 🖊 ⌄ |

| ☰⌄ | ⚏ | ⚏ | ⇤ | ⇥ | ⊞⌄ | </> | — | 🔗 | 🖼 | 📎 | ⛶ | 🔍 | I̶ₓ | ↶ | ↷ | ⟨⟩ |

Please take this survey.

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[survey-link]

If the link above does not work, try copying the link below into your web browser:
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🖊 How to use Piping in the survey invitation    ℹ Reminder: Never pipe private info (e.g., PII, PHI) into emails.

**▼ STEP 2: Conditions**

**Specify conditions for sending invitations:**

☑ When the following survey is completed:

[ "Baseline" - Baseline                                          ⌄ ]

[ AND ⇅ ]

☑ When the following logic becomes true:

[years_of_education_drop] = "None"

(e.g., [enrollment_arm_1][age] > 30 and [enrollment_arm_1][sex] = "1")
How do I use special functions?

Test logic with a record: [ -- select a record -- ⇅ ]

☐ Ensure logic is still true before sending invitation? ❓

🔍 How to use "stop logic" to disable an automated invite

**⏱ STEP 3: When to send invitations AFTER conditions are met**

⚪ Send immediately

⚪ Send on next [ -- select day -- ⇅ ] at time [        ] 🕐 H:M

⚪ Send the invitation [    ] days [   ] hours [   ] minutes

[ after ⇅ ] [ the exact time that the automated invitation was triggered ⇅ ] ❓

⚪ Send at exact date/time: [                    ] 📅🕐 M-D-Y H:M

**🔔 OPTIONAL: Enable reminders**

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

Save | Save & Copy to... | Cancel

# Surveys

**Define Conditions for Automated Survey Invitations (ASI)** ✕

In this pop-up you may define your conditions for automated survey invitations that will be sent out for the survey (and event, if a longitudinal project) listed in the Info box below. Tell me more

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**Event:** Baseline

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○ Active  ○ Not Active

✉ **STEP 1: Compose message**

From: [Display name (optional)] [nathan.gill@northwestern.edu ▾]

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

To: **[All participants who meet the conditions defined]**

Subject: [                                              ]

Send test email

| Open Sans ▾ | Paragraph ▾ | 10pt ▾ | **B** | *I* | U̲ | S̶ | A ▾ | 🖊 ▾ |

| ≡ ▾ | ☰ | ☷ | ⇤ | ⇥ | ▦ ▾ | </> | — | 🔗 | 🖼 | 📎 | ⛶ | 🔍 | I̶ₓ | ↶ | ↷ | </> |

Please take this survey.

You may open the survey in your web browser by clicking the link below:
[survey-link]

If the link above does not work, try copying the link below into your web browser:
[survey-url]

This link is unique to you and should not be forwarded to others.

📍 **NOTE:** You may modify or remove any text you wish in the Compose Message text box above. Make sure you include either [survey-link] or [survey-url] in the text or else the participant will not have a way to take the survey.

🖊 How to use Piping in the survey invitation   ⓘ Reminder: Never pipe private info (e.g., PII, PHI) into emails.

▼ **STEP 2: Conditions**

**Specify conditions for sending invitations:**

☑ When the following survey is completed:

[ "Baseline" - Baseline                          ▾ ]

[ AND ⇕ ]

☑ When the following logic becomes true:

[years_of_education_drop] = "None"

(e.g., [enrollment_arm_1][age] > 30 and [enrollment_arm_1][sex] = "1")

How do I use special functions?

Test logic with a record: [ -- select a record -- ⇕ ]

☐ Ensure logic is still true before sending invitation? [?]

♡ How to use "stop logic" to disable an automated invite

⏱ **STEP 3: When to send invitations AFTER conditions are met**

◉ Send immediately

○ Send on next [ -- select day -- ⇕ ] at time [        ] 🕐 H:M

○ Send the invitation [    ] days [    ] hours [    ] minutes

[ after ⇕ ] [ the exact time that the automated invitation was triggered ⇕ ] [?]

○ Send at exact date/time: [                    ] 📅🕐 M-D-Y H:M

🔔 **OPTIONAL: Enable reminders**

☑ Re-send invitation as a reminder if participant has not responded by a specified time? (Times below refer to AFTER original invitation time.)

○ Send every [ -- select day -- ⇕ ] at time [        ] 🕐 H:M

◉ Send every [ 7 ] days [    ] hours [    ] minutes

○ Send at exact date/time: [                    ] 📅🕐 M-D-Y H:M

– AND –

Recurrence: [ Send up to 5 times ⇕ ]

[ Save ]  [ Save & Copy to... ]  [ Cancel ]

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# Surveys

## Statistically Speaking Database  PID 607

| 🏠 Project Home | ☰ Project Setup | ✎ Online Designer | 📊 Data Dictionary | 📖 Codebook |

🎞 VIDEO: How to use this page          📷 Create snapshot of instruments     Last snapshot: never ?

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

+ 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

**Form options:**
- 📷 PDF Snapshots
- 🚫 Form Display Logic ▾
- ⊕ PDF (all instruments)
- 💬 Descriptive Popups

**Survey options:**
- 👥 e-Consent
- ☰ Survey Queue ▾
- ⚙ Auto Invitation options ▾
- 🗝 Survey Login
- 🖥 Survey Notifications

| Instrument name | Fields | PDF | Enabled as survey | Instrument actions | Survey related options | |
|---|---|---|---|---|---|---|
| Baseline 🔁 | 7 | 📄 | 📋 | Choose action ▽ | Survey settings ✓ | + Automated Invitations |
| Study Visit | 3 | 📄 | Enable | Choose action ▽ | | |
| Questionnaire | 3 | 📄 | 📋 | Choose action ▽ | Survey settings ✓ | Automated Invitations ✓ ⚠ |

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# Surveys

## Statistically Speaking Database  PID 607

🏠 **Project Home**  |  ≔ **Project Setup**  |  ☑ **Online Designer**  |  📊 **Data Dictionary**  |  📘 **Codebook**

🎬 VIDEO: How to use this page          📷 Create snapshot of instruments          Last snapshot: never ?

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:**     **Survey options:**

+ **Create** a new instrument from scratch
↧ **Import** a new instrument from the official REDCap Instrument Library
⬆ **Upload** instrument ZIP file from another p

📷 PDF Snapshots      👥 e-Consent    ≔ Survey Queue ▾
🚫 Form Display Logic ▾   ⚙ Auto Invitation options ▾   🔑 Survey Login
⊕ PDF (all instruments)   📲 Survey Notifications

| Instrument name |
| --- |
| Baseline 🔄 |
| Study Visit |
| Questionnaire |

### Designate an email field for survey communications  ✖

If you are not planning to manually enter participant email addresses into the Participant List directly, **you should designate an email field for survey communications** in this project. This can be specified on the **Project Setup** page (*Designate an email field for communications*) or on the **Survey Settings** page (*Survey-specific email invitation field*). Currently, neither option has been set, which means that automated survey invitations may result in a "failed" error when attempting to send the email. **Note: An email field should be designated *prior* to enabling your ASIs.**

Close

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# Surveys

**Statistically Speaking Database** `PID 607`

| 🏠 Project Home | ⅏ Project Setup | ✎ Online Designer | 📊 Data Dictionary | 📖 Codebook |
|---|---|---|---|---|

📽 <u>VIDEO: How to use this page</u>　　　📷 Create snapshot of instruments　　Last snapshot: never ❓

This page allows you to build and customize your data collection instruments one field at a time. You may add new fields or edit existing ones. New fields may be added by clicking the Add Field buttons. You can begin editing an existing field by clicking on the ✏ **Edit** icon. If you decide that you do not want to keep a field, you can simply delete it by clicking on the 🗑 **Delete** icon. To reorder the fields, simply use the ✤ icon to **drag and drop** a field to a different position within the form below (you may also click this icon to see extended move options). Checking the checkbox in the right upper corner of each field will add the field to the multi-field selection, allowing you to quickly modify several fields at once. **NOTE:** While in development status, all field changes will take effect immediately in real time.

**◀ Return to list of instruments**　　　　　　　　　　**«** Previous instrument　　Next instrument **»**

Current instrument:　**Contact Information**
Form name:　contact_information　　　　　　　　　　　　　　　🎨 Add custom CSS styling　❓

| Add Field | Add Matrix of Fields | Import from Field Bank |
|---|---|---|

✏ ⌥ 🗐 ✤ 🗑　*Field Name:* email　　☐

**Email address**　　　　　　　　　　　　[_____]

Validation type: **Email**

| Add Field | Add Matrix of Fields | Import from Field Bank |
|---|---|---|

# Surveys

**Statistically Speaking Database** `PID 607`

| 🏠 Project Home | ☰ Project Setup | ✏ Online Designer | 📊 Data Dictionary | 📖 Codebook |
|---|---|---|---|---|

📹 [VIDEO: How to use this page](#)          📷 Create snapshot of instruments          Last snapshot: never ?

This page allows you to build and customize your data collection instruments one field at a time. You may add new fields or edit existing ones. New fields may be added by clicking the Add Field buttons. You can begin editing an existing field by clicking on the ✏ **Edit** icon. If you decide that you do not want to keep a field, you can simply delete it by clicking on the 🗑 **Delete** icon. To reorder the fields, simply use the ✥ icon to **drag and drop** a field to a different position within the form below (you may also click this icon to see extended move options). Checking the checkbox in the right upper corner of each field will add the field to the multi-field selection, allowing you to quickly modify several fields at once. **NOTE:** While in development status, all field changes will take effect immediately in real time.

⬅ Return to list of instruments                    « Previous instrument    Next instrument »

Current instrument:  **Contact Information**
Form name:  contact_information                    🎨 Add custom CSS styling  ?

| Add Field | Add Matrix of Fields | Import from Field Bank |
|---|---|---|

✏ ⤵ ▣ ✥ 🗑    *Field Name:* email                                                    ☐

**Email address**                                          [                    ]

Validation type: **Email**

| Add Field | Add Matrix of Fields | Import from Field Bank |
|---|---|---|

# Statistically Speaking Database `PID 607`

**🏠 Project Home**  **☰ Project Setup**  **⚙ Other Functionality**  **↺ Project Revision History**

**Project status:** 🔧 Development

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

---

### Main project settings

| Not started | |
|---|---|

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

[Disable] ✅ Use longitudinal data collection with defined events? [?]

[Enable] ⛔ Use the MyCap participant-facing mobile app?      📱 [Learn more about MyCap](#)

[Modify project title, purpose, etc.]

[I'm done!]

---

### 🔧 Design your data collection instruments & enable your surveys

Add or edit fields on your data collection instruments (survey and forms). This may be done by either using the Online Designer (online method) or by uploading a Data Dictionary (offline method). You may then enable your instruments to be used as surveys in the Online Designer. Quick links: [Download PDF of all instruments](#) OR [Download the current Data Dictionary](#)

Go to [📝 Online Designer] or [📊 Data Dictionary]      Explore the [👥 REDCap Instrument Library]

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

Learn how to use [⚡ Smart Variables] [✏ Piping] [@ Action Tags] [➕ Field Embedding] [√x Special Functions]

[I'm done!]

---

### 🔧 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]

In progress

[I'm done!]

---

### ⚙ Enable optional modules and customizations

[Modify] ✅ Repeating instruments and events [?]

[Disable] ✅ Auto-numbering for records [?]

[Enable] ⛔ Scheduling module (longitudinal only) [?]

[Enable] ⛔ Randomization module [?]

[Enable] ⛔ Designate an email field for communications (including survey invitations and alerts) [?]

[Enable] ⛔ Mosio SMS services for surveys and alerts [?]

[Enable] ⛔ SendGrid Template email services for Alerts & Notifications [?]

[Additional customizations]      ⓘ Learn about [Data Collection Strategies for Repeating Surveys](#)

Optional

[I'm done!]

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# Statistically Speaking Database  `PID 607`

**Project status:** 🔧 Development

### Main project settings

Not started

Disable  ✅ Use surveys in
Disable  ✅ Use longitudina
Enable   ⛔ Use the MyCap

I'm done!

Modify project title, purpose

### 🔧 Design your data colle

Not started

Add or edit fields on your da
Online Designer (online meth
instruments to be used as su
Download the current Data D

I'm done!

Go to  📝 Online Designer

Have you checked the Check Fo

Learn how to use  [⚡] Smart V

### 🔧 Define your events an

In progress

Create events for re-using da

Go to  Define My Events  o

I'm done!

### 🔒 Enable optional modu

Optional

Modify  ✅ Repeating instr
Disable ✅ Auto-numberin
Enable  ⛔ Scheduling mod
Enable  ⛔ Randomization
Enable  ⛔ Designate an e
Enable  ⛔ Mosio SMS services for surveys and alerts ❓
Enable  ⛔ SendGrid Template email services for Alerts & Notifications ❓

Additional customizations

---

## Designate an email field for communications (including survey invitations and alerts)  ✕

**Choose an email field to use for invitations to survey participants:**

✓ -- select a field --

Contact Information

**email "Email address"**

n direct specific email communications to the email address provided.
ions, automated survey invitations, survey confirmation emails, and Alerts & Notifications. If a field is designated for that purpose, then any records in your project that have an email address captured for that particular field will have that email address show up as the participant's email address in the Participant List (unless an email address has already been entered for that participant in the Participant List directly).

Using the designated email address field can be especially valuable when your first data collection instrument is not enabled as a survey while one or more other instruments have been enabled as surveys. Since email addresses can only be entered into the Participant List directly for the first data collection instrument, the designated email field provides another opportunity to capture the email address of survey participants.

Please be aware that designating an email field means that survey responses can NEVER BE ANONYMOUS because of the fact that the participant's email address can be viewed on a data entry form, which means it is easy to identify the record/response to which the email address belongs.

**NOTE:** If the participant's email address has already been captured directly in the Participant List, then that email address will supersede the value of the email field here when survey invitations are sent to the participant. Also, if the email invitation field exists on multiple longitudinal events, on a repeating instrument, or on a repeating event, the field's value will be synchronized across all instances/events so that changing it in one location will change the value across all events/instances where the field appears.

**Survey-specific email invitation field:** While the email invitation field discussed here is a project-level setting, it is helpful to know that there also exists a survey-level email invitation field option that can be utilized for particular surveys in the project (whereas the project-level field would be applied to ALL surveys). A survey-specific email invitation field can be enabled for any given survey, in which you can designate any email field in your project to use for sending survey invitations for that particular survey. Thus, you can collect several email addresses (e.g., for a student, a parent, and a teacher) and utilize each email for a different survey in the project. Then you can send each person an invitation to their own survey, after which all the survey responses get stored as one single record in the project. See the 'Survey Settings' page in the Online Designer for this survey-level setting.

Save   Cancel

ℹ Learn about Data Collection Strategies for Repeating Surveys

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# Statistically Speaking Database    `PID 607`

🏠 **Project Home**   ☰ **Project Setup**   ⚙ **Other Functionality**   ↺ **Project Revision History**

**Project status:** 🔧 Development        Completed steps **0** of **8**

---

### ❌ Not started  [I'm done!]

**Main project settings**

| Disable | ✅ Use surveys in this project? [?] | 🎞 [VIDEO: How to create and manage a survey](#) |
|---|---|---|
| Disable | ✅ Use longitudinal data collection with defined events? [?] | |
| Enable | ⛔ Use the MyCap participant-facing mobile app? 📱 [Learn more about MyCap](#) | |

[Modify project title, purpose, etc.]

---

### ❌ Not started  [I'm done!]

**🔧 Design your data collection instruments & enable your surveys**

Add or edit fields on your data collection instruments (survey and forms). This may be done by either using the Online Designer (online method) or by uploading a Data Dictionary (offline method). You may then enable your instruments to be used as surveys in the Online Designer. Quick links: [Download PDF of all instruments](#) OR [Download the current Data Dictionary](#)

Go to [✎ Online Designer] or [📋 Data Dictionary]   Explore the [🔒 REDCap Instrument Library]

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

Learn how to use [⚡ Smart Variables] [⚡ Piping] [@ Action Tags] [✛ Field Embedding] [√x Special Functions]

---

### ↻ In progress  [I'm done!]

**🔧 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]

---

### ⚙ Optional  [I'm done!]

**⚙ Enable optional modules and customizations**

| Modify | ✅ Repeating instruments and events [?] |
|---|---|
| Disable | ✅ Auto-numbering for records [?] |
| Enable | ⛔ Scheduling module (longitudinal only) [?] |
| Enable | ⛔ Randomization module [?] |
| Disable | ✅ Designate an email field for communications (including survey invitations and alerts) [?] |
| | Field currently designated: **email** (*"Email address"*) |
| Enable | ⛔ Mosio SMS services for surveys and alerts [?] |
| Enable | ⛔ SendGrid Template email services for Alerts & Notifications [?] |

[Additional customizations]     ℹ Learn about [Data Collection Strategies for Repeating Surveys](#)

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# Statistically Speaking Database  `PID 607`

**🏠 Project Home**  |  **≔ Project Setup**  |  **✎ Online Designer**  |  **📊 Data Dictionary**  |  **📖 Codebook**

🎞 VIDEO: How to use this page        📷 Create snapshot of instruments      Last snapshot: never ❓

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: | Survey options: |
| --- | --- |
| 📷 PDF Snapshots | 👥 e-Consent   ☰ Survey Queue ▾   ⚙ Auto Invitation options ▾ |
| 🚫 Form Display Logic ▾ | 🔑 Survey Login   📢 Survey Notifications |
| ⬇ PDF (all instruments) | |
| 💬 Descriptive Popups | |

**+ 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 | PDF | Enabled as survey | Instrument actions | Survey related options |
| --- | --- | --- | --- | --- | --- |
| Baseline 🔁 | 7 | 📄PDF | 📋 | Choose action ▽ | Survey settings ✓   + Automated Invitations |
| Contact Information | 1 | 📄PDF | Enable | Choose action ▽ | |
| Study Visit | 3 | 📄PDF | Enable | Choose action ▽ | |
| Questionnaire | 3 | 📄PDF | 📋 | Choose action ▽ | Survey settings ✓   Automated Invitations ✓ |

# Thank you!