

Online Designer- REDCap – How-To Guide

Design your data collection instruments (forms/surveys)

Online Designer: Click Online Designer to start building your data collection instruments

Data Dictionary: Alternatively, you may upload your data dictionary via an Excel csv file in order to build your data collection instruments. **Note:** This is considered an advanced step and should not be used unless you are an experienced user.



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

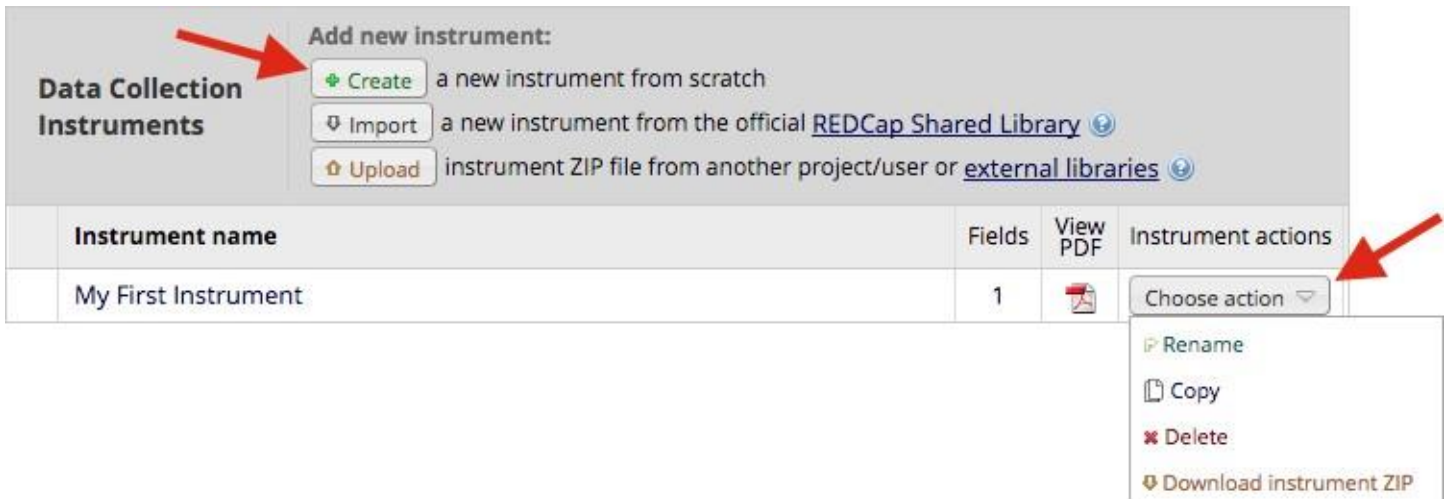
You may also browse for pre-built data collection instruments in the [REDCap Shared Library](#)

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

Online Designer

REDCap will begin your project with a data collection instrument titled “My First Instrument”. To change the title, click the “Choose action” button.


To add additional data collection instruments, click on the Create icon. Click on Add Instrument here and enter a name for the new instrument.



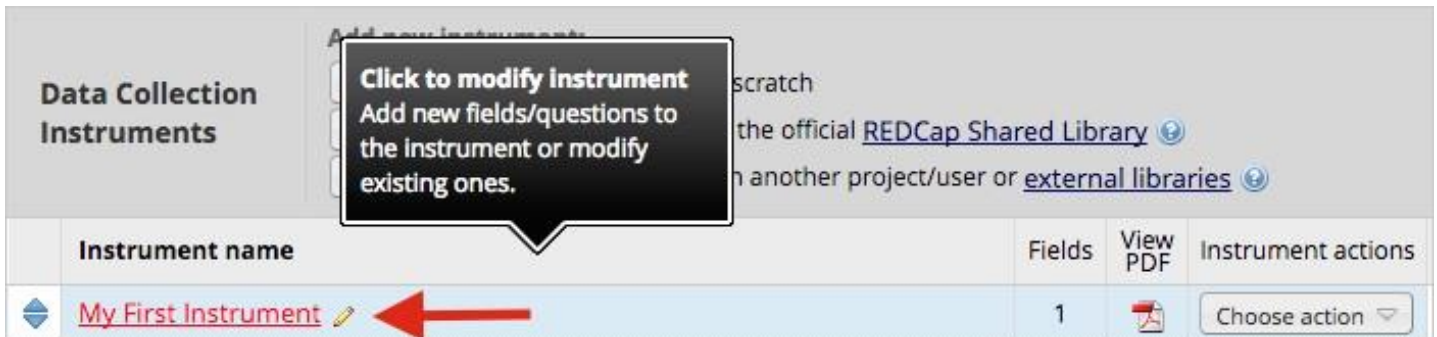
Data Collection Instruments

Add new instrument:

- Create** a new instrument from scratch
- Import** a new instrument from the official [REDCap Shared Library](#)
- Upload** instrument ZIP file from another project/user or [external libraries](#)

| Instrument name | Fields | View PDF | Instrument actions |
|---------------------|--------|---|--|
| My First Instrument | 1 |  | Choose action ▼ Rename Copy Delete Download instrument ZIP |




To begin building your data collection instrument, click on the instrument name.



Data Collection Instruments

Add new instrument:

- Create** a new instrument from scratch
- Import** a new instrument from the official [REDCap Shared Library](#)
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| Instrument name | Fields | View PDF | Instrument actions |
|--|--------|---|--------------------|
|  <u>My First Instrument</u>  | 1 |  | Choose action ▼ |

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

Record Identifier

The very first field in the first data collection instrument must be used as the record identifier and must be unique. The record identifiers can be automatically sequentially- generated or user-entered. The record identifier field cannot be deleted however you may rename this field by clicking on the pencil icon. It is strongly recommended to not use any PHI as the unique identifier to preserve confidentiality.

[Project Home](#)
[Project Setup](#)
[Online Designer](#)
[Data Dictionary](#)


[Create snapshot of instruments](#)
[VIDEO: How to use this page](#)

Last snapshot: never [?](#)

Ready to add fields

You may now begin adding fields to your data collection instrument below using the Online Designer. Alternatively, you may build your fields in the Data Dictionary (offline method) by clicking its tab above.


This module will allow you to create new data collection instruments/surveys or edit existing ones. Changes may be made by either using the **Online Designer** or **Upload Data Dictionary** (see tabs above), in which you may use either method or both. The Online Designer may help you get some initial fields/forms built quickly or to make quick edits, but using the Data Dictionary file may be more helpful if you will be adding a large number of fields for this project.

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 **drag and drop** a field to a different position within the form below. NOTE: While in development status, all field changes will take effect immediately in real time. *Are you using Action Tags yet? If not, [learn about Action Tags here](#).*

[Return to list of instruments](#)

Current instrument: **My First Instrument**

[Preview instrument](#)


 Variable: record_id

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](#)

Add Fields to Your Data Collection Instruments

Click the Add Field button  and select one of the several field types available:

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

✓
----- Select a Type of Field -----

Text Box (Short Text, Number, Date/Time, ...)
Notes Box (Paragraph Text)
Calculated Field
Multiple Choice - Drop-down List (Single Answer)
Multiple Choice - Radio Buttons (Single Answer)
Checkboxes (Multiple Answers)
Yes - No
True - False
Signature (draw signature with mouse or finger)
File Upload (for users to upload files)
Slider / Visual Analog Scale
Descriptive Text (with optional Image/Video/Audio/File Attachment)
Begin New Section (with optional text)
Dynamic Query (SQL)

The following pages give an explanation of each field and examples for each field.

Examples of Field Types

Text Box (Short Text) with a validation of Date (M-D-Y)

This field can be used for text, dates, numbers, email addresses, phone numbers etc. Use the Validation drop down (date format, email, phone, time, letters only, SS#, zipcode, integer, number-with/without decimals) to restrict how data should be entered.

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 [How to use Piping](#)

Today's Date:

Action Tags / Field Annotation (optional)

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

Variable Name (utilized during data export)

date

ONLY letters, numbers, and underscores

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

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

Minimum:

Maximum:

– or –

Enable searching within a biomedical ontology ?

-- choose ontology to search --

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





Variable: date

Date of Visit:

31

Today

M-D-Y

Notes Box (Paragraph Text)

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: Notes Box (Paragraph Text

Field Label [How to use Piping](#)

Describe any issues that you had with the visit:

Action Tags / Field Annotation (optional)

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

Variable Name (utilized during data export)

issues

ONLY letters, numbers, and underscores

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

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

Variable: Issues

Describe any issues that you had with the visit:

Expand

Calculated Field

This field can perform real-time calculations based on the data from other fields. For an example, you could create a calculation based off the start time and end time of a test to see how much time elapsed.

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: Calculated Field

Field Label [How to use Piping](#)

Calculation between start time and end time (in hours)

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

`datediff([end_time],[start_time],"h")`

✓ **Valid** [Clear calculation](#)

Test calculation with a record: -- select record --

Action Tags / Field Annotation (optional)

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

Variable Name (utilized during data export)

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

ONLY letters, numbers, and underscores

Required?* ☒ No ☐ Yes
* Prompt if field is blank

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

Custom Alignment Right / Vertical (RV)
Align the position of the field on the page

Field Note (optional)
Small reminder text displayed underneath field

Save

Cancel





Variable: calculate_time

Calculation between start time and end time (in hours)

View equation

Multiple Choice – Drop Down List (Single Answer)

This field will display your answer choices as a drop-down list. When a field contains multiple answer choices, you must give each answer choice a variable name. If you do not, REDCap will automatically assign them for you.

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: Multiple Choice - Drop-down List (Single Answer)

Field Label [How to use Piping](#)

What is your favorite flavor of ice cream?

Variable Name (utilized during data export)

icecream_flavor

ONLY letters, numbers, and underscores

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

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

1, Chocolate
2, Vanilla
3, Strawberry
4, Mint Chocolate Chip

☐ Enable auto-complete for this dropdown [How do I manually add choices?](#)

Action Tags / Field Annotation (optional)





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

Raw values for choices were added automatically

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

- 1 was set as the raw value for **Chocolate**
- 2 was set as the raw value for **Vanilla**
- 3 was set as the raw value for **Strawberry**
- 4 was set as the raw value for **Mint Chocolate Chip**
- 5 was set as the raw value for **Butter Pecan**

Close

Variable: icecream_flavor

What is your favorite flavor of ice cream?

Multiple Choice – Radio Buttons (Single Answer)

This field will display your answer choices as radio buttons

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)

Field Label [How to use Piping](#)

What is your favorite flavor of ice cream?

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

1, Chocolate
2, Vanilla
3, Strawberry
4, Mint Chocolate Chip

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

Action Tags / Field Annotation (optional)

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

Variable Name (utilized during data export)

icecream_flavor

ONLY letters, numbers, and underscores

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

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

Variable: icecream_flavor

What is your favorite flavor of ice cream?

☐ Chocolate
☐ Vanilla
☐ Strawberry
☐ Mint Chocolate Chip
☐ Butter Pecan

reset

Checkboxes (Multiple Answers)

This field will display your answer choices as check boxes and will allow more than one answer.

Note: I added a field note that states “Check all that apply”.

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: Checkboxes (Multiple Answers)

Field Label [How to use Piping](#)

Which are your favorite flavors office cream?

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

1, Chocolate
2, Vanilla
3, Strawberry
4, Mint Chocolate Chip

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

Action Tags / Field Annotation (optional)

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

Variable Name (utilized during data export)

icecream_flavor

ONLY letters, numbers, and underscores

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

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) (check all that apply)

Small reminder text displayed underneath field

Save

Cancel

Variable: icecream_flavor

Which are your favorite flavors office cream?

☐ Chocolate
☐ Vanilla
☐ Strawberry
☐ Mint Chocolate Chip
☐ Butter Pecan

(check all that apply)

Yes-No

This field will display Yes and No as radio button answer choices.

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: Yes - No

Field Label [How to use Piping](#)

Do you like ice cream?

Choices (not modifiable)

1, Yes
0, No

Action Tags / Field Annotation (optional)

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

Variable Name (utilized during data export)

like_icecream

ONLY letters, numbers, and underscores

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

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





Variable: like_icecream

Do you like ice cream?

☐ Yes

☐ No

reset

True – False

This field will display True and False as radio button answer choices.

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: True - False

Field Label [How to use Piping](#)

You do not like ice cream.

Choices (not modifiable)

1, True
0, False

Action Tags / Field Annotation (optional)

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

Variable Name (utilized during data export)

not_like_icecream

ONLY letters, numbers, and underscores

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

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






Variable: not_like_icecream

You do not like ice cream.

☐ True

☐ False

reset

Signature (draw signature with mouse or finger)

This field will allow the participant to add their signature using their mouse or the finger (if using a tablet or touch screen device)

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: Signature (draw signature with mouse or finger)

Field Label
[How to use Piping](#)

Sign your name:

Action Tags / Field Annotation (optional)

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

Variable Name (utilized during data export)

signature

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

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

Variable: signature

Sign your name:

Add signature

File Upload (for users to upload files)

This field gives the participant the ability to upload a file or image

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: File Upload (for users to upload files)

Field Label [How to use Piping](#)

Upload signed informed consent:

Action Tags / Field Annotation (optional)

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

Variable Name (utilized during data export)

icf

ONLY letters, numbers, and underscores

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

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






Variable: icf

Upload signed informed consent:

[Upload document](#)

Slider Visual Analog Scale

This field gives you a scale with three answer choices. If you select “Display number value (0-100)”, it will code the answer given.

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: Slider / Visual Analog Scale

Field Label [How to use Piping](#)

How much pain are you having right now?

Labels displayed above slider (optional):

Left label (bottom, if vertical): No Pain

Middle label: Moderate pain

Right label (top, if vertical): Severe Pain

Display number value (0-100)? ☐

Action Tags / Field Annotation (optional)

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

Variable Name (utilized during data export)

current_pain_level

ONLY letters, numbers, and underscores

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

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 / Horizontal (RH)

Align the position of the field on the page

TIP: Make your sliders vertical with RV or LV alignment.

Field Note (optional)

Small reminder text displayed underneath field

Save

Cancel






Variable: current_pain_level

No Pain

Moderate pain

Severe Pain

How much pain are you having right now?

Change the slider above to set a response


reset

Descriptive Text (with optional Image/File Attachment)

This field will allow you to add text such as instructions or additional information. It also gives you the option to add an image as a link or as an inline image.

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: Descriptive Text (with optional Image/Video/A )

Field Label [How to use Piping](#)

Please be sure to mark all PHI as identifiers. Refer to the list of patient identifiers.

Action Tags / Field Annotation (optional)


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

Variable Name (utilized during data export)

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

ONLY letters, numbers, and underscores


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**

[HIPAA Identifiers.pdf](#) [\[X\] Remove](#)

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.)

Save


Cancel

Link:












Variable: phi_list

Please be sure to mark all PHI as identifiers. Refer to the list of patient identifiers.

Attachment:  [HIPAA Identifiers.pdf](#) (0.01 MB)

Inline Image:

Variable: phi_list

Please be sure to mark all PHI as identifiers. Refer to the list of patient identifiers.

List of 18 HIPAA Identifiers

- Names;
- All geographical subdivisions smaller than a State, including street address, city, county, precinct, zip code, and their equivalent geocodes, except for the initial three digits of a zip code, if according to the current publicly available data from the Bureau of the Census: (1) The geographic unit formed by combining all zip codes with the same three initial digits contains more than 20,000 people; and (2) The initial three digits of a zip code for all such geographic units containing 20,000 or fewer people is changed to 000.
- All elements of dates (except year) for dates directly related to an individual, including birth date, admission date, discharge date, date of death; and all ages over 89 and all elements of dates (including year) indicative of such age, except that such ages and elements may be aggregated into a single category of age 90 or older;
- Phone numbers;
- Fax numbers;
- Electronic mail addresses;
- Social Security numbers;
- Medical record numbers;
- Health plan beneficiary numbers;
- Account numbers;
- Certificate/license numbers;
- Vehicle identifiers and serial numbers, including license plate numbers;
- Device identifiers and serial numbers;
- Web Universal Resource Locators (URLs);
- Internet Protocol (IP) address numbers;
- Biometric identifiers, including finger and voice prints;
- Full face photographic images and any comparable images; and
- Any other unique identifying number, characteristic, or code (note this does not mean the unique code assigned by the investigator to code the data)

Begin New Section (with optional text)

This field is used as a section header. You can add text or leave blank.

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: Begin New Section (with optional text)

Field Label [How to use Piping](#)

Demographic Information

Save

Cancel


With optional text:

Demographic Information

With no text:

Add Matrix of Fields

If you have a group of questions that all have the same answer choices, you can create a Matrix of Fields. Instead of clicking Add Field, you would click Add Matrix of Fields. You would add an optional header, your field labels and variable names, indicate which fields are required, add your answer choices and select whether these fields should be a single answer (radio button) or multiple answers (checkboxes). If you would like only one answer choice to be selected per column, enable ranking. You must also give your matrix a group name.


Edit Matrix of Fields
✕

You may add or edit a matrix (i.e. grid) of project fields on this data collection instrument by completing the fields below. By providing all necessary info below and clicking Save, the new matrix of fields will be added to the form on this page. A Field Label and Variable name must be provide for each field in the matrix, and you must also set the Choices (i.e. matrix column headers) and answer format (Single Answer vs. Multiple Answers) for the entire matrix. [View a matrix example](#) or [Read more about matrix fields on the Help & FAQ.](#)

Matrix Header Text (optional)

How often do you eat the following ice cream?

Expand

Matrix Rows

Each row represents a different field with its own label and variable name.

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

| Field Label | Variable Name <small>ONLY letters, numbers, and underscores</small> | Required? | Field Annotation ? |
|--------------|--|--------------------------|------------------------|
| Chocolate | chocolate | <input type="checkbox"/> | <input type="text"/> ✕ |
| Vanilla | vanilla | <input type="checkbox"/> | <input type="text"/> ✕ |
| Strawberry | strawberry | <input type="checkbox"/> | <input type="text"/> ✕ |
| Butter Pecan | butter_pecan | <input type="checkbox"/> | <input type="text"/> ✕ |

Add another row

Matrix Column Choices

Choices (one choice per line)

1, Never
2, Rarely
3, Sometimes
4, Often
5, Always

How do I manually code the choices?

Other Matrix Info

Answer Format:

Single Answer (Radio Buttons) ▾


Ranking: [What is a ranked matrix of fields?](#)

☐ Allow only 1 choice to be selected per column (radio buttons only)




Matrix group name: ONLY letters, numbers, and underscores

icecream_matrix

[What is a matrix group name?](#)


   *Matrix group: icecream_matrix*


How often do you eat the following ice cream?


| | Never | Rarely | Sometimes | Often | Always | |
|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-------|
|  Variable: chocolate | | | | | | |
| Chocolate | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | reset |
|  Variable: vanilla | | | | | | |
| Vanilla | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | reset |
|  Variable: strawberry | | | | | | |
| Strawberry | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | reset |
|  Variable: butter_pecan | | | | | | |
| Butter Pecan | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | reset |

Edit/Copy/Move/Delete a Field


Edit: To edit a field, click on the pencil icon 

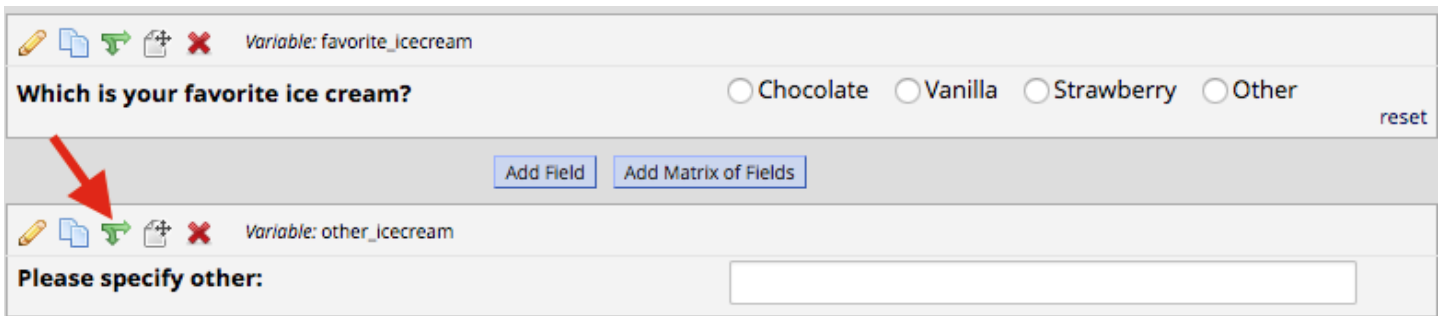
Copy: To copy a field, click on the double paper icon 

Move: To move a field, click on the paper with pointer icon.  You can also move a field by click and hold field and drag the field to a different location.

Delete: To delete a field, click on the red X icon 

Add Branching Logic

Branching logic is used when you have a field/question that you would only like to appear when a specific answer is given. To enable branching logic, click on the double green arrows  on the field you want to hide. For an example, I only want the “If Other, please specify” field to show if the answer to the question above it was Other.



Variable: favorite_icecream

Which is your favorite ice cream? ☐ Chocolate ☐ Vanilla ☐ Strawberry ☐ Other [reset](#)

[Add Field](#) [Add Matrix of Fields](#)

Variable: other_icecream

Please specify other:

After clicking on the double green arrows, scroll through the list of field choices and drag and drop the field you want to base your branching logic on. Click Save once finished.

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: **other_icecream** - Please specify other:

☐ **Advanced Branching Logic Syntax** [\(How do I use the advanced syntax?\)](#)

Show the field ONLY if...

[Clear logic](#)

Test logic with a record:

— OR —

☒ **Drag-N-Drop Logic Builder**

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

start_time = (define criteria)
end_time = (define criteria)
current_pain_level = (define criteria)
calculate_time = (define criteria)
favorite_icecream = Chocolate (1)
favorite_icecream = Vanilla (2)
favorite_icecream = Strawberry (3)
favorite_icecream = Other (4)

Drag
and
Drop

Show the field ONLY if...

☒ ALL below are true

☐ ANY below are true

favorite_icecream = Other (4)

[Clear logic](#)

The field now alerts me that branching logic exists. If I want to view or modify the existing branching logic, I would click on the double green arrows.



Variable: other_icecream [Branching logic exists]

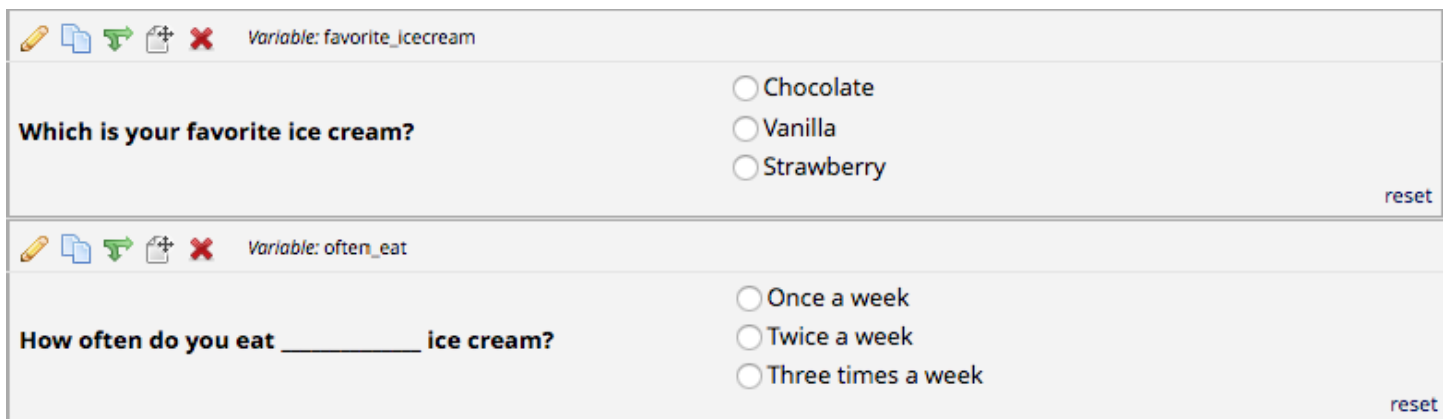
Please specify other:

Add Piping Logic

Piping gives you the ability to insert answers and place it in various places within REDCap.

For an example, I have a field that asks the participant “What kind of ice cream do you like?”. I then have another field that asks the participant “How often do you eat _____ice cream?”. I have added piping logic in my second question so that it will insert the answer from the first question.

Before:



Variable: favorite_icecream

Which is your favorite ice cream?

☐ Chocolate

☐ Vanilla

☐ Strawberry

reset

Variable: often_eat

How often do you eat _____ ice cream?

☐ Once a week

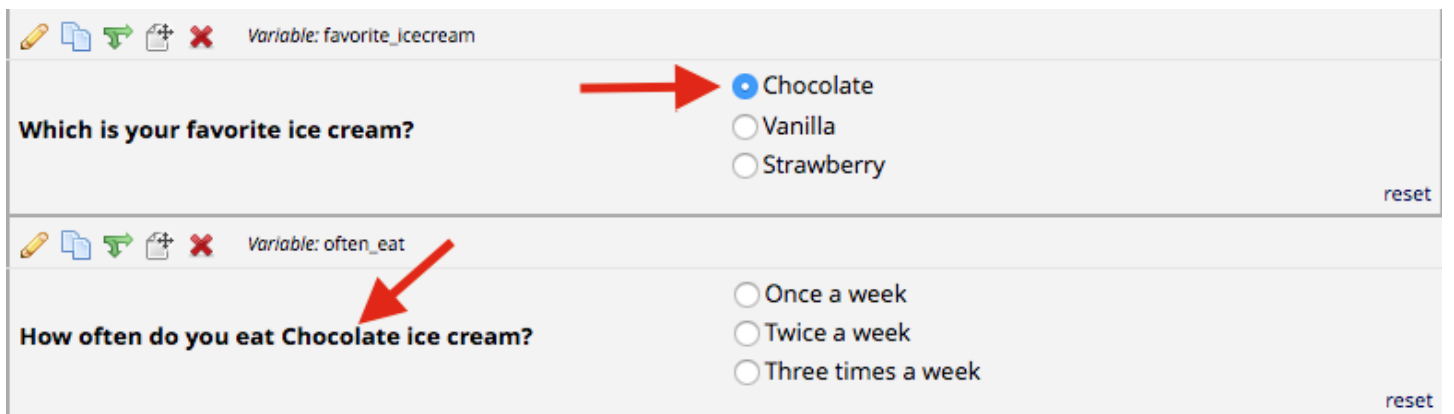
☐ Twice a week

☐ Three times a week

reset

One the participant answers the first question; the answer is then inserted into my next question.

After:



Variable: favorite_icecream

Which is your favorite ice cream?

☒ Chocolate

☐ Vanilla

☐ Strawberry

reset

Variable: often_eat

How often do you eat Chocolate ice cream?

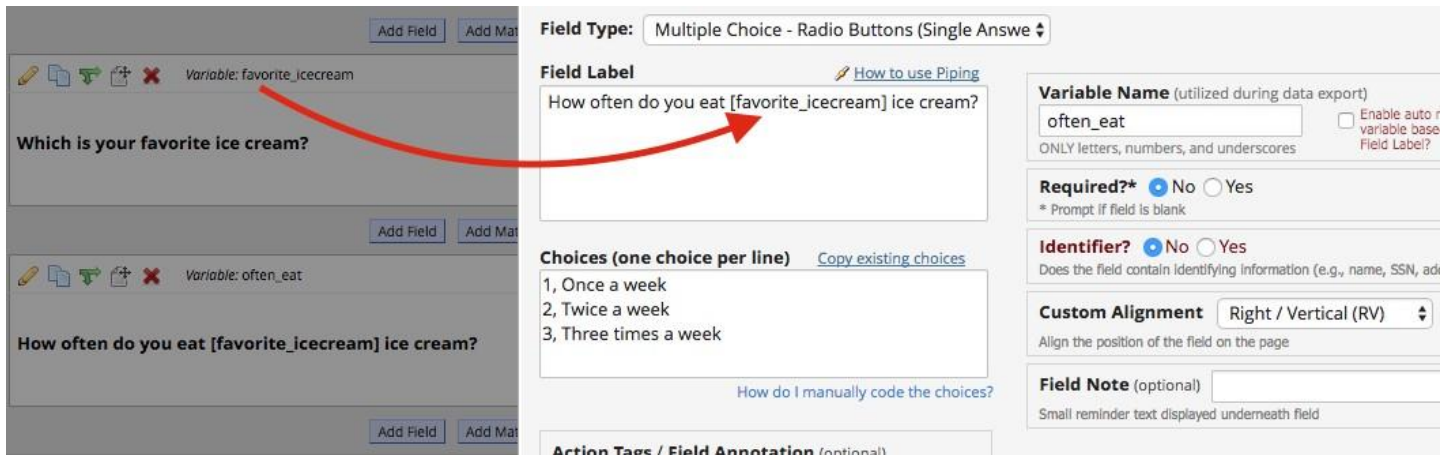
☐ Once a week

☐ Twice a week

☐ Three times a week

reset

To add piping, all you have to do is add the variable name of the field you want to pipe in. The variable name must be inserted into square brackets [].



The screenshot shows the REDCap field configuration interface. On the left, there are two field configuration panels. The top panel is for a field named 'favorite_icecream' with the label 'Which is your favorite ice cream?'. The bottom panel is for a field named 'often_eat' with the label 'How often do you eat [favorite_icecream] ice cream?'. A red arrow points from the 'favorite_icecream' variable name in the top panel to the '[favorite_icecream]' part of the label in the bottom panel. The right panel shows the configuration for the 'often_eat' field. It is a 'Multiple Choice - Radio Buttons (Single Answer)' field. The 'Field Label' is 'How often do you eat [favorite_icecream] ice cream?'. The 'Variable Name' is 'often_eat'. The 'Required?' checkbox is checked. The 'Identifier?' checkbox is checked. The 'Custom Alignment' is set to 'Right / Vertical (RV)'. The 'Field Note' is 'Small reminder text displayed underneath field'. The 'Choices' section shows three options: '1, Once a week', '2, Twice a week', and '3, Three times a week'.

Piping can be used in many different places in REDCap such as:

- Field Labels
- Field Notes
- Section Headers
- Survey Instructions and Survey Acknowledgment Text