

Quick Guide to Instrument Design

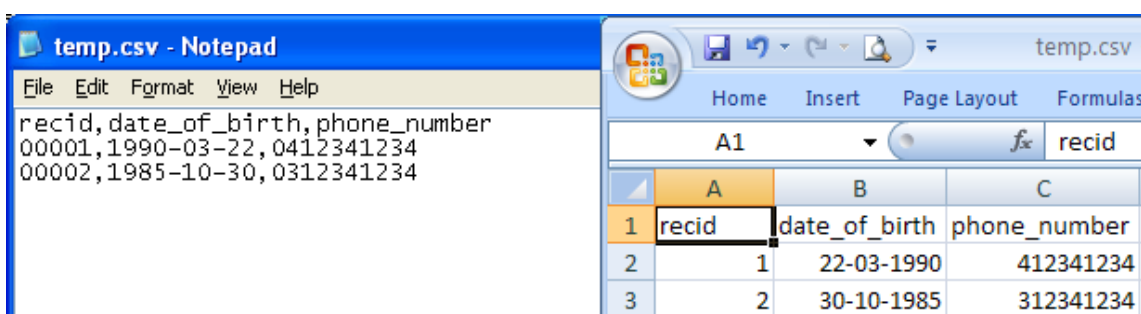
These instructions are for a Classic project created from scratch (not a template)

1. Click on **Designer** (on the left-hand navigation bar)
2. Click on **Choose Action** and select **'rename'**
 - a. give the instrument a name specific to its purpose (rather than leaving it the default 'My First Instrument')
3. Click on the **'add field'** button
 - a. Decide on the field type from the drop-down list. The type of data you are collecting determines which field type to choose.
 - i. If choosing 'text box', consider using the validation drop-down to restrict how the data is entered (e.g. for an email address, date, zip code, etc)
 - b. In the box 'Field label' type the question as you wish it to appear to the person who is filling out the form/survey
 - c. In the variable name box, put a short 'nickname' for your question
 - d. If your question involves choices, enter 1 choice per line in the choices box
 - i. Yes/no and true/false questions come with the choices pre-set
 - e. If you are collecting protected health information, you can mark the field as an identifier
 - f. If you want the person completing the form to not be able to save/submit without answering the question, mark the field as required
4. Repeat the above steps until you have all the questions in the instrument
5. If your instrument needs to be a survey, follow the [Quick Guide for Survey Setup](#)

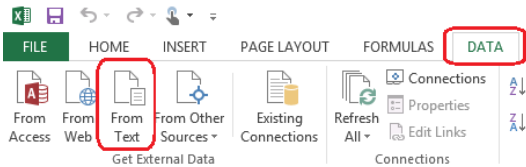
Note on CSV files

A CSV file is simple plain text with one record per line and columns delimited with a comma – i.e. each individual value in each record is separated by a comma (CSV is an acronym for "Comma-Separated Values"). On Windows computers CSV files are set to open using Excel by default, and Excel will generally use the commas to separate the values into columns, but **a CSV file is NOT an Excel file.**

Beware Excel's not-so-helpful automatic data formatting: it can cause you to lose format information from CSV data such as leading zeros and specific date formatting...



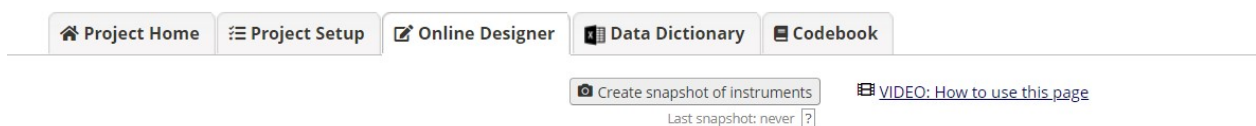
It may be preferable to open your CSV file in Excel not by double-clicking on the file in the usual way, but by opening a blank Excel worksheet and using the import wizard: on the Data tab in the ribbon is the option **From Text**.



This method enables you to specify that you want Excel to treat some (or all) of your columns as text, thus displaying the data exactly as it appears in the source file, not using Excel’s opinion of what you want to see.

Online Designer

The Online Designer lists the instruments that exist in a project and provides functions for manipulating them at the instrument level (as opposed to the manipulation of items within an instrument). You can access Online Designer by clicking on the word ‘Designer’ on the left-hand navigation bar (under Project Home and Design’ or by clicking on the Online Designer button on the Project Setup page.



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		Survey options:		Add new instrument:		
		Survey Queue	Survey Login	Create	a new instrument from scratch	
		Survey Notifications		Import	a new instrument from the official REDCap Shared Library ?	
		Upload or download Auto Invitations		Upload	instrument ZIP file from another project/user or external libraries ?	
Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options	
Demographics	21		Enable	Choose action ▾		
Baseline Data	18		Enable	Choose action ▾		
Pain Management Survey - PRE	17			Choose action ▾	Survey settings	+ Automated Invitations
Intervention Data	21			Choose action ▾	Survey settings	+ Automated Invitations
Pain Management Survey - POST	17			Choose action ▾	Survey settings	+ Automated Invitations
Study Completion	5		Enable	Choose action ▾		

Create a New Form

1. Click **Create**
2. Click **Add instrument here** in the position in the list where the new form is to be created (this can be [changed](#) later)
3. Assign a name and click **Create**
4. Add variables to the form. The new form will NOT be saved until at least one variable has been added.

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

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](#) ?

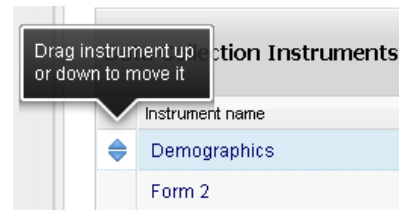
Instrument name	Fields	View PDF	Instrument actions
test Employee Directory	7		Choose action ▾
+ Add instrument here			

Delete a Form (in Online Designer)

1. Click the **Delete** button (under Actions) for the relevant form
2. Confirm the deletion. The form will be removed along with all of its variables

Reorder Forms (Move instruments) in Online Designer

1. Position your mouse cursor over the left-hand end of the form's row
2. Click and drag the row to a new position



Caution on moving instruments

If you have surveys in your project and wish to use the public survey link, your survey needs to be the first instrument in the project, as seen in the image below:

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions
Demographics Survey	5			Choose action ▾
Data Entry Form	0		Enable	Choose action ▾

If the data entry form is first, as in the image below...

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions
Data Entry Form	1		Enable	Choose action ▾
Demographics Survey	4			Choose action ▾

...your public survey link will be disabled.

Also keep in mind [branching logic](#), [piping](#) and [calculations](#) when moving instruments. For instance, say you plan on entering data into Data Entry Form A, positioned as the first instrument within your project, which will then be piped into Data Entry Form B, positioned as the second instrument within your project. If you move Data Entry Form B to be the first instrument and enter the data into that form first, the field into which your piping should be seen on Data Entry Form A will not have a value.

Additionally, if you have a survey queue or auto-continue enabled, check to see how re-ordering the instruments impacts those features.

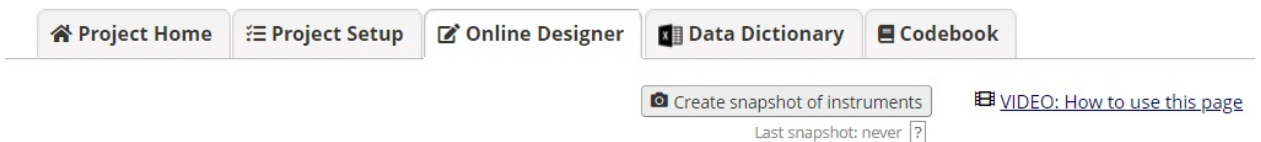
Finally, it's a good idea to check the Survey Settings to see if you need to adjust the wording of the survey instructions and/or confirmation emails (if you have that enabled.) To get to Survey Settings, click on Designer on the left-hand navigation bar under Project Home and Design.

Please note that if you change the first survey (e.g. move survey B to come before Survey A), that changes the public survey link. If you had created a custom public survey link before moving the survey, that custom public survey link will no longer be valid. Any participant who clicks on the old survey link will get the message: **Thank you for your interest, but you are not a participant for this survey.** To solve this problem, delete the custom public survey link and then create it again.

[Rename a Form in Online Designer](#)

REDCap will begin your project with a data collection instrument titled "My First Instrument". You will want to change the title so that it is reflective of the data you are collecting in it.

1. Click the **Rename** button (under Actions) for the form
2. Enter the new name and click **Save**



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.

