



Training Scenario

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- Your PI calls you into her office. She explains that she has just received a grant to study quality of life and happiness over time in various cultures that requires survey data collection to happen in a sophisticated manner. You have a discussion with her in which she lays out all the things she really needs an electronic survey to do. She asks, "Is this possible? And could you let me know soon?" You review your notes from the conversation and find the following requirements:
 - Deliver an electronic survey to anywhere in the world.
 - Sometime we'd like to just create link that respondents can enter anonymously
 - Sometimes we would like to e-mail the survey to particular people
 - After the participant provides their name, she would like the survey to address the participant by name in several places in the questionnaire. (piping)
 - Deliver PEDSQL measures in English and Spanish (library)
 - Deliver a parent or child PEDSQLs measure based on who the respondent is (branching logic)
 - Calculate the PEDSQL score (calculated Fields)
 - Ask about happiness with a graphical sliding bar or a matrix
 - This survey will be repeated with the same participants over a matter of years (longitudinal format) in order to judge happiness and quality of life over the years.
 - It would be good to have an electronic calendar that everyone on staff can see
 - The undergraduate interns should be able to see the data but for goodness sakes don't let them have access to changing the data.
 - Could we set up custom data reports filtered on 5 different variables before hand to save time?
 - Frank (the stats guy) is probably going to need an SPSS or SAS output

What are you going to do?

Item 1: Deliver an Electronic Survey to Anywhere in the World.

Sometimes we'd like to just create link that respondents can enter anonymously

Sometimes we would like to e-mail the survey to particular people

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.

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Demographics	6			Rename Delete	Survey settings + Automated Invitations
PedsQL v4.0 Child Report Ages 8-12	28			Rename Delete	Survey settings + Automated Invitations
PedsQL v4.0 Parent Report For Children Ages 8-12	28			Rename Delete	Survey settings + Automated Invitations
Scoring questions	0			Rename Delete	

Project Home → Project Setup → On-line Designer → Enable As Survey

If we determine that we need to use either the link to survey or the e-mail survey to participants option, then we need to enable the instruments as a survey. This will allow us to get to the manage participants option.

Item 1: Deliver an Electronic Survey to Anywhere in the World.

Sometimes we'd like to just create link that respondents can enter anonymously

Sometimes we would like to e-mail the survey to particular people

Manage Survey Participants

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

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

To obtain the survey link, copy the URL below and paste it into the body of an email message in your own email client. Your email recipient(s) can then click the link to begin taking your survey. [Get shorter survey link](#) or [Get embed code to place link on a webpage](#).

Public Survey URL: [Copy to clipboard](#)

[Open public survey](#) [Send me URL via email](#)

Project Home → Manage Survey Participants → Public Survey Link

This option creates a link that you could then post or send to participants and they can then link to it and fill the survey out.

Disadvantage: You are not going to have the ability to monitor who has or has not filled out the questionnaire

Item 1: Deliver an Electronic Survey to Anywhere in the World.

Sometimes we'd like to just create link that respondents can enter anonymously
Sometimes we would like to e-mail the survey to particular people









Manage Survey Participants

 Public Survey Link

 Participant List

 Survey Invitation Log

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

Participant List belonging to [Initial survey] "Demographics"							
Remove all participants							
Displaying 1 - 2 of 2							
Add participants							
Compose Survey Invitations							
Export list							
Email	Participant Identifier	Enable	Link	Invitation Scheduled?	Invitation Sent?	Responded?	Survey Queue
Dawn.Sherrill@cchmc.org	Disabled		-				remove
Maxx.Somers@cchmc.org	Disabled		-				remove

Project Home → Manage Survey Participants → Public Survey Link

It's also possible to email a particular set of participants an invitation to complete a survey.

As noted before, with this option you can:

- Schedule an invitation to be sent out in advance
- Track if the invitation e-mail has been sent
- Track to see if the participant has responded

Item 2: After the participant provides their name, she would like the survey to address the participant by name in several places in the questionnaire.
(piping)

The image displays two screenshots of a survey design interface. The top screenshot shows a configuration panel for a variable named 'name'. The 'Field Label' is 'What is your full name?'. The 'Variable Name' is 'name'. The 'Validation?' is set to 'None'. The 'Required?' option is 'No'. The bottom screenshot shows a configuration panel for a variable named 'age'. The 'Field Type' is 'Text Box (Short Text)'. The 'Field Label' is '[name]. What is your age?'. The 'Variable Name' is 'age'. The 'Validation?' is set to 'Number'. The 'Minimum' is 0 and the 'Maximum' is 100. A green oval highlights the '[name]' variable name in the field label.

Project Setup → Online Designer → Select a Data Collection Instrument → Add new variable

To Pipe in a variable:

- Select the variable you want to pipe in
- Insert into your text the variable name inside square brackets

Item 3: Deliver PEDSQL measures to a parent or a child from the same survey (branching logic)

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), in which you may use either method or both. You may then enable your instruments to be used as surveys in the Online Designer. Quick links: [Download PDF of all data collection instruments](#) OR [Download the current Data Dictionary](#)

Go to or

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?

Project Setup → REDCap Shared Library

The REDCap Shared Library

- Holds user created instruments that you can bring into a survey
- You can also upload instruments that you feel are worth sharing to the REDCap library
- Utilizing the REDCap library ONLY works if the instrument is listed AND it matches the instrument they need and is listed in there approved IRB protocol - **PLEASE NOTE IN REALITY ALMOST ALL STUDIES DO NOT USE THE REDCap LIBRARY -INSTEAD THE INSTRUMENTS ARE CREATED FROM SCRATCH**

Item 3: Deliver PEDSQL measures to a parent or a child from the same survey (branching logic)

Return to REDCap

Logged in as Maxx Somers (University of Cincinnati / Cincinnati Childrens Hospital Medical Center)

Keyword search: Search options:

Minimum downloads: Recent additions: Curated by REDLOC?

Shared Library

Search

Library Metrics

My Activity

Institution Activity

Consortium Activity

REDLOC

REDLOC Login

Found 2 results matching your search

Title	Downloads
▶ PedsQL v4.0 Child Report Ages 8-12 ★	58
▶ PedsQL v4.0 Parent Report For Children Ages 8-12 ★	54

Didn't find what you were looking for? [Suggest a validated instrument for library inclusion.](#)

• The icon ★ indicates a REDLOC curated instrument.

Item 3: Deliver PEDSQL measures to a parent or a child from the same survey (branching logic)

The screenshot shows the 'Online Designer' tab in the REDCap interface. At the top, there are navigation buttons for 'Project Setup', 'Online Designer', and 'Data Dictionary'. Below these is a link for a video: 'VIDEO: How to use this page'. A note states: '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.'

The main content area is titled 'Data Collection Instruments' and contains a table with the following data:

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey-related options
Demographics	6			<input type="button" value="Rename"/> <input type="button" value="Delete"/>	<input type="button" value="Survey settings"/> <input type="button" value="+Automated Invitations"/>
PedsQL v4.0 Child Report Ages 8-12	28			<input type="button" value="Rename"/> <input type="button" value="Delete"/>	<input type="button" value="Survey settings"/> <input type="button" value="+Automated Invitations"/>
PedsQL v4.0 Parent Report For Children Ages 8-12	28			<input type="button" value="Rename"/> <input type="button" value="Delete"/>	<input type="button" value="Survey settings"/> <input type="button" value="+Automated Invitations"/>
Scoring questions	0		<input type="button" value="Enable"/>	<input type="button" value="Rename"/> <input type="button" value="Delete"/>	

Project Setup → Online Designer

The Instruments are then Downloaded into the On-Line Designer

- It's ok that each is listed separately
- By changing some of the survey setting, we can make what the user will see appear seamless.

Item 3: Deliver PEDSQL measures to a parent or a child from the same survey (branching logic)

This screenshot is identical to the one above, but with a green circle highlighting the 'Survey Queue' button in the 'Survey options' section of the 'Data Collection Instruments' panel.

Project Setup → Online Designer → Survey Queue

Survey Queue Allows you to

- Define the order of the Survey
- Define branching logic to like to

Item 3: Deliver PEDSQL measures to a parent or a child from the same survey (branching logic)

Set up Survey Queue

The Survey Queue displays a list of your surveys to a participant all on a single page, in which the queue comprises all surveys that are to be completed (like a 'to-do' list) as well as the surveys that the participant has already completed. [Tell me more](#)

NOTE: The first instrument survey is not displayed below because it does not have a survey that comes before it for which to set conditions.

[Add custom text to display at top of survey queue](#)

Activated?	Survey Title	Display survey in the Survey Queue when...	Auto start?
Event 1			
<input checked="" type="checkbox"/>	"PedsQL v4.0 Child Report Ages 8-12" - Event 1	<input checked="" type="checkbox"/> When the following survey is completed: "Demographics" - Event 1 AND <input checked="" type="checkbox"/> When the following logic becomes true: [parentorchild] = 2 (e.g., [enrollment_arm_1][age] > 30 and [enrollment_arm_1][gender] = "1")	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	"PedsQL v4.0 Parent Report For Children Ages 8-12" - Event 1	<input checked="" type="checkbox"/> When the following survey is completed: "Demographics" - Event 1 AND <input checked="" type="checkbox"/> When the following logic becomes true: [parentorchild] = 1 (e.g., [enrollment_arm_1][age] > 30 and [enrollment_arm_1][gender] = "1")	<input checked="" type="checkbox"/>

Project Setup → Online Designer → Survey Queue

- Ability to set branching logic for each survey instrument
- Here I've asked each instrument to auto-start after demographics is complete
- If the respondent indicates that they are a child, the PEDSQL Child Report will launch
- For the PEDSQL parent version, I've set it to autostart when demographics is complete and the respondent indicates that they are a parent

Item 3: Deliver PEDSQL measures to a parent or a child from the same survey (branching logic)

Drag-N-Drop Logic Builder

Displaying field choices for the following data collection instrument:
 PedsQL v4.0 Child Report Ages 8-12

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

- pedsq_c_ha_1 = Never0 (0)
- pedsq_c_ha_1 = Almost Never1 (1)
- pedsq_c_ha_1 = Sometimes2 (2)
- pedsq_c_ha_1 = Often3 (3)
- pedsq_c_ha_1 = Almost Always4 (4)
- pedsq_c_ha_2 = Never0 (0)
- pedsq_c_ha_2 = Almost Never1 (1)
- pedsq_c_ha_2 = Sometimes2 (2)
- pedsq_c_ha_2 = Often3 (3)

Drag and Drop

Show the field ONLY if...

- ALL below are true
- ANY below are true

parentorchild = Child (2) ❌

Clear logic

Save Cancel

Project Setup → Online Designer → Select an Instrument

Branching Logic

- You can also do branching logic for individual questions.
- Here I've indicated in each question that it is not to be asked unless the answer to the question "ParentorChild = Child"
- By using branching logic, we can insure that our PI request of delivering the right questions to the right people is fulfilled

Item 4: Calculate PEDSQL Scores in the survey

Field Type:

Question Number (optional)
Displayed only on the survey page

Field Label [How to use Piping](#)
Health and Activities Score

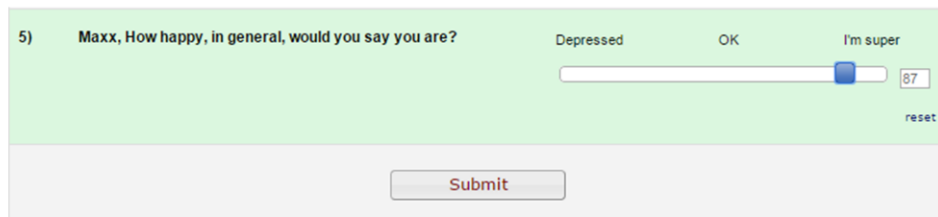
Calculation Equation [How do I format the equation?](#)
[pedsq_c_ha_1] + [pedsq_c_ha_2] + [pedsq_c_ha_3]
+ [pedsq_c_ha_4] + [pedsq_c_ha_5] +
[pedsq_c_ha_6] + [pedsq_c_ha_7] + [pedsq_c_ha_8]

Project Setup → Online Designer → Select an Instrument → Select a Variable → Field Type = Calculated Field

How to Create Calculated Field Variables

- Variable names of what we would like to add in brackets (in this case the questions in the Health and Activity section).
- In-between bracketed variables place the mathematical notation you would like to use.
- It is possible to do more complicated calculations in this field.
- For further guidance, click on the, “How do I format the equation” section on the calculated field variable and check out the various possibilities.

Item 5: Ask about happiness with a graphical sliding bar



5) Maxx, How happy, in general, would you say you are?

Depressed OK I'm super

87

reset

Submit

The image shows a screenshot of a REDCap form. The question is "5) Maxx, How happy, in general, would you say you are?". Below the question is a graphical sliding bar with three labels: "Depressed" on the left, "OK" in the middle, and "I'm super" on the right. A blue slider is positioned at approximately 87% of the way from "Depressed" to "I'm super". To the right of the slider is a small input box containing the number "87". Below the slider is a "reset" link. At the bottom of the form is a "Submit" button.

Project Setup → Online Designer → Select an Instrument → Select a Variable → Field Type = Slider Visual Analogue Scale

Graphical Sliding Bar

- Another requirement from our PI was an unusual
- It's useful to familiarize yourself with the several different ways to display questions in REDCap
 - Check boxes
 - Drop down lists
 - Radio buttons
 - Yes – No
 - True False

Item 6: This survey will be repeated with the same participants over a matter of years (longitudinal format) in order to judge happiness and quality of life over the years.

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.

Data Collection Instrument	Event 1 (1)	1 Year (2)	2 Year (3)	3 Year (4)	4 Year (5)	5 Years (6)	6 years (7)
Demographics (survey)	✓	✓	✓	✓	✓	✓	✓
PedsQL v4.0 Child Report Ages 8-12 (survey)	✓	✓	✓	✓	✓	✓	✓
PedsQL v4.0 Parent Report For Children Ages 8-12 (survey)	✓	✓	✓	✓	✓	✓	✓

To define as longitudinal data collection with repeating forms:

Project Setup → Main Project settings → Enable longitudinal data collection

To define events over the course of data collection:

Project Setup → Define your events and designate instruments for them → Define My Events

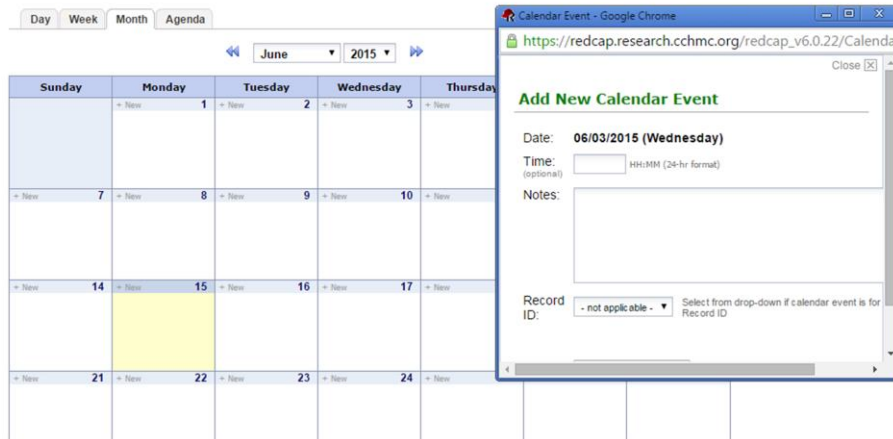
To define which instruments are asked at each event:

Project Setup → Define your events and designate instruments for them → Define My Events

Longitudinal Survey

- Enable longitudinal data collection option
- Define the events you want to appear
- Designate the various instruments you would like to give at each time point

Item 7: It would be good to have an electronic calendar that everyone on staff can see

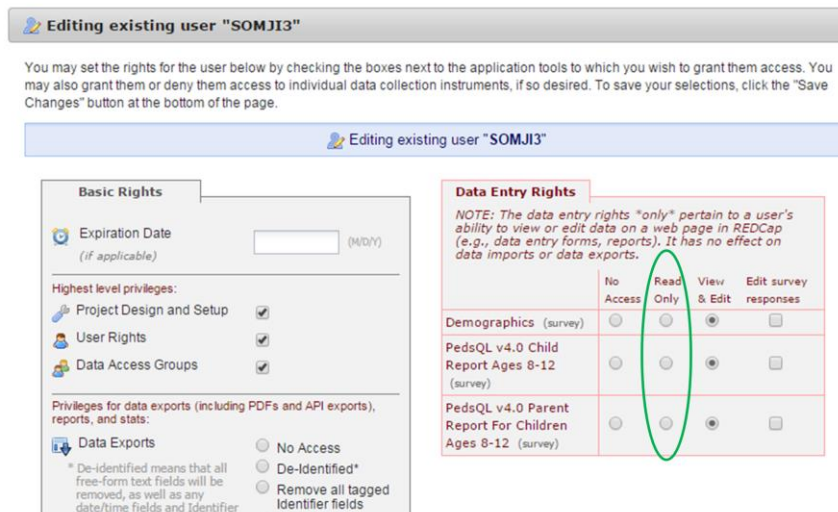


Project Home → Application Side Bar → Calendar → Generate a Schedule

Electronic Calendar

- REDCap has its own calendar system
- Useful for multisite studies in which researchers are at different institutions.
- You can add new events manually
- You can generate a schedule by going to:
 - Project Home → Application Side Bar → Calendar → Generate a Schedule

Item 8: The high school students should be able to see the data but don't let them have access to changing the data.



Project Home → Applications Side Bar → User Rights

- As each person is added to the survey, specific user rights options are presented
- Here is a user rights profile that will only allow this person to view and edit responses.
- In this case, given how concerned our PI is, students should probably only have Read Only access.

Item 9: Could we set up custom data reports filtered on 5 different variables before hand to save time?

The screenshot shows a 'STEP 3' configuration window for filters. It contains six filter rows, each with a dropdown for the variable name, a dropdown for the operator, and a dropdown for the value. The filters are:

- Filter 1: parentorchid [name], are you completing - Operator: = Value: Parent
- Filter 2: happy [name], How happy, in general, wo - Operator: < Value: 50
- Filter 3: pedsq_c_ha_1 "1. It is hard for me to walk - Operator: = Value: Never0
- Filter 4: pedsq_c_ha_4 "4. It is hard for me to lift sc - Operator: = Value: Never0
- Filter 5: pedsq_c_ha_3 "3. It is hard for me to do s - Operator: = Value: Never0
- Filter 6: -- select a field -- Operator: = Value: (empty)

Each filter row has a red 'X' icon on the right. Between filter rows are 'AND' dropdown menus. At the bottom, there is a 'Switch format: Use advanced logic' link.

Project Home → Quick Tasks → Create a Report → Create New Report

Overview of the reports function

- Reports are used to create outputs of selected date
- Reports are flexible and will allow you to drill down to what ever data you are trying to find
- Reports do this by giving you options concerning which fields (or variables) to select
- Reports also allow to select multiple filters
- You can filter by event or time period
- You can order the results by any variable you choose

Item 10: Frank (the stats guy) is probably going to need an SPSS or SAS output

The screenshot shows the 'Exporting "All data (all records and fields)"' dialog box. It has two main sections:

- Choose export format:** A list of options with radio buttons:
 - CSV / Microsoft Excel (raw data)
 - CSV / Microsoft Excel (labels)
 - SPSS Statistical Software
 - SAS Statistical Software
 - R Statistical Software
 - Stata Statistical Software
- De-identification options (optional):** A section with checkboxes for:
 - Known Identifiers:
 - Remove all tagged identifier fields (tagged in Data Dictionary)
 - Hash the Record ID field (converts record name to an unrecognizable value)
 - Free-form text:
 - Remove unvalidated Text fields (i.e. Text fields other than dates, numbers, etc.)
 - Remove Notes/Essay box fields
 - Date and datetime fields:
 - Remove all date and datetime fields
 - OR
 - Shift all dates by value between 0 and 364 days (shifted amount determined by algorithm for each record) [What is date shifting?](#)
 - Also shift all survey completion timestamps by value between 0 and 364 days (shifted amount determined by algorithm for each record)

At the bottom, there are 'Export Data' and 'Cancel' buttons.

Project Home → Applications Side Menu → Data Exports, Reports, and Stats

- There are various export formats/data analytic software packages options available