



ANZCA
FPM



REDCap tips

REDCap Tips

This document is to assist you with your survey creation in REDCap (Research Electronic Data Capture).

It describes the basic functions you will use but is certainly not an exhaustive description of all the features in REDCap. Your local health district may offer REDCap guidance, and there are many online REDCap guides and YouTube tutorials which are also helpful.

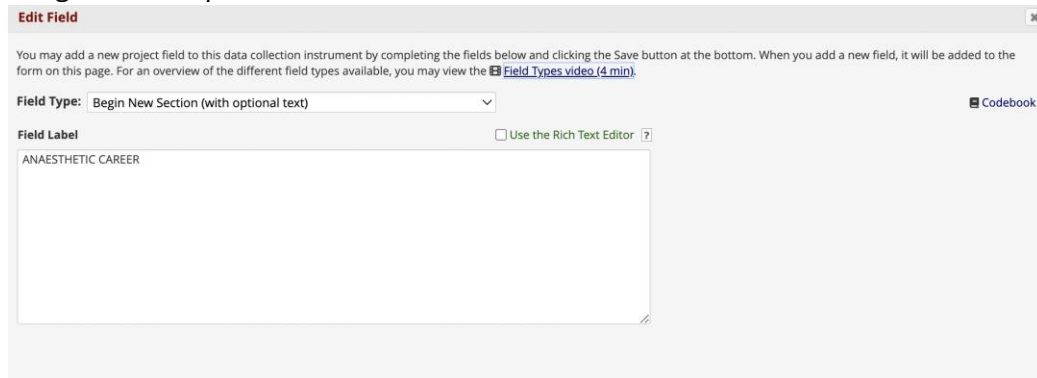
Creating a survey in REDCap

1. Request access to REDCap through your local institution.
2. Start 'New Project'.
(Note in some health districts this may require you to complete a request form to start a new project via REDCap).
3. Under 'Project Setup' tab → 'Main Project Settings' → Enable 'Use Surveys in this project'.
4. To design your survey – within 'Design your data collection instruments & enable your surveys' section → Go to "Online Designer"
→ Under 'Data Collection Instruments' → 'Create a new instrument from scratch'.
→ Name your survey and then click on the name to enter designer mode and construct the survey.
→ Click 'Add Field' to insert a new question or feature into the survey.

To create a *new section* of the survey (Image 1):

- FIELD TYPE: Begin New Section (with optional text)
- Enter section name in FIELD LABEL
- Save.

Image 1: REDcap – Create a new section



The screenshot shows the 'Edit Field' window in REDCap. At the top, there is a title bar 'Edit Field' and a close button. Below the title bar, there is a paragraph of instructions: '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 \(4 min\)](#).' Below the instructions, there are two main input areas. The first is 'Field Type', which is a dropdown menu currently set to 'Begin New Section (with optional text)'. To the right of this dropdown is a 'Codebook' icon. The second is 'Field Label', which is a text input field containing the text 'ANAESTHETIC CAREER'. To the right of this field is a checkbox labeled 'Use the Rich Text Editor' which is currently unchecked, and a help icon.

For *Multiple Choice Questions (MCQs)* (Image 2):

- FIELD TYPE: Multiple Choice – Radio Buttons (single answer)
- FIELD LABEL: Enter question e.g. 1. What is your gender? (note you will need to manually number each question in all field labels)
- CHOICES (one choice per line): Enter possible responses – numbered 1, 2, etc.
E.g. 1, Male
2, Female
3, Non-binary or other

(Note the numbers assigned to each choice are used to categorise each response in the survey results – they are not visible when participants complete the survey)

Image 2: REDcap – MCQs

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)

Question Number (optional) Displayed only on the survey page

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

1. What is your gender?

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

1, Male
2, Female
3, Non-binary or other
4, Prefer not to say

Variable Name (utilized in logic, calcs, and exports)
gender Enable auto naming of variable based upon its Field Label?
ONLY letters, numbers, and underscores

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

Required?* No Yes
* Prompt if field is blank

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

Custom Alignment Left / Vertical (LV)
Align the position of the field on the page

Field Note (optional)
Small reminder text displayed underneath field

For questions with a *matrix of options* (e.g. how many hours of work do you work in public/private/nonclinical or the satisfaction questions → two fields are needed (Images 3 and 4):

- 1st FIELD TYPE: Descriptive text (with optional image/video/audio)
- 1st FIELD LABEL: Enter Question (e.g. 7. What is the distribution of work you do in?)

Image 3: REDcap – Matrix of options – 1st Step

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/Audio/File Attachment)

Question Number (optional) Displayed only on the survey page

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

7. Of the total number hours of paid work you do each week, what is the distribution of the hours you work in:

Action Tags / Field Annotation (optional)

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

Variable Name (utilized in logic, calcs, and exports)
header_paidhrs Enable auto naming of variable based upon its Field Label?
ONLY letters, numbers, and underscores

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

Optional file attachment, image, audio, or video:

Embed an external video (provide video URL) [?](#)

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

Display format of video: Inline Inside popup

- or -

Attach an image, file, or embedded audio

Upload file

Display format of attachment on page:

Link
 Inline image/PDF
 Audio file (play in embedded player on page)
[Compatibility notice for embedded audio](#)

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

- 2nd FIELD TYPE: Matrix of Fields
 - Leave 'Matrix Header Text' Blank
 - Under 'Matrix Rows', 'FIELD LABEL': Enter each subset of the question (e.g. public clinical work/private clinical work/non-clinical work)
 - Under 'Matrix Column Choices': Enter possible responses – numbered
E.g. 1, 0 – 25%
2, 26 - 50%
3, 51 - 75%
4, >75%
 - Answer Format: Single Answer (Radio Buttons)

Image 4: REDcap – Matrix of Options – 2nd Step

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) *Note: Adding section header text here will start a new page on the survey.

Expand

Matrix Rows Enable auto naming of variable based upon its Field Label?

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

Field Label	Variable Name <small>ONLY letters, numbers, and underscores</small>	Question Number <small>(optional)</small>	Required?*Field Annotation ?	
<input type="text" value="Public clinical work"/>	<input type="text" value="public_work"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/> ✕
<input type="text" value="Private clinical work"/>	<input type="text" value="private_work"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/> ✕
<input type="text" value="Non-clinical / clinical support work"/>	<input type="text" value="nonclin_work"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/> ✕

Matrix Column Choices

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

1, 0 - 25%

2, 26 - 50%

3, 51 - 75%

4, > 75%

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

Other Matrix Info

Answer Format:
 ▼

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

To enter a *free text comment box* (Image 5):

- FIELD TYPE: Notes Box (Paragraph Text)
- FIELD LABEL: Optional free text comments box regarding anaesthetic career (for example)

Image 5: REDcap – Free text comment box

The screenshot shows the 'Edit Field' interface in REDcap. At the top, it says 'Edit Field' and provides instructions: '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 \(4 min\)](#).' Below this, the 'Field Type' is set to 'Notes Box (Paragraph Text)'. The 'Question Number' is optional and currently empty. The 'Field Label' is 'Optional free text comments box regarding anaesthetic career, work distribution and hours of work:'. There is a checkbox for 'Use the Rich Text Editor' which is unchecked. The 'Variable Name' is 'freetext_anaescareer'. The 'Required?' field is set to 'No'. The 'Identifier?' field is also set to 'No'. The 'Custom Alignment' is set to 'Left / Vertical (LV)'. The 'Field Note' is optional and currently empty. At the bottom right, there are 'Save' and 'Cancel' buttons.

Please note, for each question:

- You will need to assign a short 'variable name'. This variable name will appear in the results table to identify each question
- Required? – Answer No (No question is compulsory)
- Identifier? – Answer No
- Alignment – suggest Left Vertical

Once you have entered and saved each question, you will see all list of all your questions / fields in order (Image 6).

- Subject headings will appear in **Yellow**.
- To edit a question after you have saved it, click on the yellow pencil button.

Image 6: REDcap – questions/fields review

The image displays two screenshots of the REDcap online designer interface. The left screenshot shows the 'DEMOGRAPHICS' section with three questions: '1. What is your gender?', '2. What is your age?', and '3. In what decade did you obtain your specialist anaesthetic qualification (e.g. FANZCA or equivalent specialist qualification)?'. The right screenshot shows the 'ANAESTHETIC CAREER' section with questions '6. How many hours of paid work do you do per week?' and '7. Of the total number hours of paid work you do each week, what is the distribution of the hours you work in:'. Question 7 is a matrix question with four columns representing percentage ranges: 0-25%, 26-50%, 51-75%, and >75%. The matrix rows are 'Public clinical work', 'Private clinical work', and 'Non-clinical / clinical support work'.

5. Under 'Survey Settings' within the Online Designer
 - Survey instructions – Insert introductory paragraph here.
 - You can adjust text size and font etc. under Survey Design Options.
 - Under 'Survey Customizations'
 - Question Numbering – 'Custom Numbered'
 - Pagination – 'Multiple pages (display one section per page)'
 - Other settings suggested as per Image 7 below - mostly left unchanged from default settings.

Image 7: REDcap – survey settings

The screenshot displays the 'Survey Settings' page in REDcap, organized into several sections:

- Response Management:**
 - Allow participants to download a PDF of their responses at end of survey?** (No)
 - Save a PDF of completed survey response to a File Upload field** (Disabled)
 - Option: Store the translated version of the PDF (if using Multi-language Management)
 - Survey-specific email invitation field** (No)
 - For 'Required' fields, display the red 'must provide value' text on the survey page?** (No)
 - Display the font resize options at the top of the survey page** (Yes)
 - Allow survey respondents to view aggregate survey results after completing the survey?** (Disabled)
 - Additional settings:
 - 10: Minimum number of responses required before participants are allowed to view aggregate data (recommended = 10).
 - Do not show plots for questions lacking diversity in response values? (What does this mean?)
 - Text-To-Speech functionality** (Disabled)
 - Language of text to be spoken: English - United States (Female)
 - Show or hide the Submit buttons** (Always displays the Submit buttons)
- Submit Button Customization:**
 - Any alternative text provided for the submit buttons will override their default text below.
 - Buttons: << Previous Page, Next Page >>, Submit 1, Submit
- Survey Access:**
 - Response Limit (optional)** (e.g., 150)
 - Will include: partial and completed responses
 - Custom text to display to respondent on survey when limit is reached:

Thank you for your interest; however, the survey is closed because the maximum number of responses has been reached.
 - Time Limit for Survey Completion (optional)** (0 days, 0 hours, 0 minutes)
 - Note: If the respondent loads the survey after this time has passed, it will not allow them to begin or continue the survey.
 - Survey Expiration (optional)** (02/08/2024 16:13)
- Survey Termination Options:**
 - Auto-continue to the next survey?** (No)
 - Conditional logic: `[age] > 30 and [sex] = "1"`
 - Redirect to a URL** (No)
 - Survey Completion Text** (Thank you for taking the time to complete the survey. ANZCA Gender Equity Sub-Committee)
- Options related to Survey Stop Actions:**
 - Prevent survey responses from being saved if the survey ends via Stop Action?** (No)
 - Warning: If any data has been saved on the survey instrument prior to the Stop Action being triggered, that data will be deleted.
 - Alternate Survey Completion Text (optional)** (No)
 - e-Consent Framework** (Disabled)
 - Options: Auto-Archiver enabled, Auto-Archiver + e-Consent Framework
 - PDF Auto-Archiver** (No)
 - Send confirmation email?** (No)

6. Back on main 'Project Setup' page: Under 'Enable Optional modules and customizations' → Enable auto-numbering for records.

7. Test survey:

- You can do this within the online designer using "Preview Instrument" on the top right corner of the online designer
- Alternatively, under "Survey Distribution Tools" in the left hand menu, you can get a URL link which will open your survey in a new webpage.
- When testing your survey if you have any issues with spacing of questions or page layout you may choose to enter a 'gap' in between questions for better spacing
 - To do this enter a new field → Descriptive text → leave everything else blank (Image 8).

Image 8: REDcap – edit field (gap)

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/Audio/File Attachment) Codebook

Question Number (optional)
Displayed only on the survey page

Field Label Use the Rich Text Editor ?

Action Tags / Field Annotation (optional)

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

Variable Name (utilized in logic, calcs, and exports)
gap1 Enable auto naming of variable based upon its Field Label?
ONLY letters, numbers, and underscores

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

Optional file attachment, image, audio, or video:
 Embed an external video (provide video URL) ?

e.g. <https://youtube.com/watch?v=E1cCuWMupz0>,
<https://vimeo.com/62730281>, <http://example.com/movie.mp4>
Display format of video: Inline Inside popup
- or -
 Attach an image, file, or embedded audio
[Upload file](#)
Display format of attachment on page:
 Link
 Inline image/PDF

8. Move project to ‘production status’ once ready.

9. To send out the survey - go to ‘Survey Distribution Tools’ in left hand menu (Image 9).

- Public Survey URL – can be copied and pasted into an email.
- A link to QR Code is also available.

Image 9: REDcap – Survey distribution tools

Survey Distribution Tools

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

Using a public survey link is the simplest and fastest way to collect responses for your survey. You may obtain the survey link to your participants. Responses will be collected anonymously (unless the survey contains questions asking for id of participant). **NOTE:** Since this method uses a single survey link for all participants, it allows for the possibility of part 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 and then click the link to begin taking your survey.

Public Survey URL:

Protect the public survey using the Google reCAPTCHA feature ?

Link Actions

-
-
-
-

Link Customizations

-
-
-

10. To get results go to ‘Data Exports, Reports and Stats’ under Applications on left hand menu. There are two options for seeing the data:

- a) Immediately view survey responses available here under ‘View report’
 - Graphs for each question created by REDCap can be automatically generated by pressing the “Stats and Charts” red button
- b) For more detailed stats analysis, use the “Export data” tab
 - Statisticians often request the data as an SPSS file.
 - We suggest you save a de-identified Excel file for your records.