

Contents

- Creating the survey 2
- Branching logic..... 8
- Some Useful Functionalities12
 - Adding a User to Your Project12
 - Setting Notifications.....14
 - Distributing the Survey16
 - Putting the Project into Production Mode.....17
 - Viewing/Exporting Submissions or Entering Data Manually.....20

Creating the survey

- 1) Log in to your account using your credentials.

REDCap[®]

Log In

Please log in with your user name and password. If you are having trouble logging in, try clicking the "Forgot your password" link below.

Username:

Password:

[Forgot your password?](#)

REDCap is a secure web platform for building and managing online databases and surveys. REDCap's streamlined process for rapidly creating and designing projects offers a vast array of tools that can be tailored to virtually any data collection strategy. REDCap provides automated export procedures for seamless data downloads to Excel and common statistical packages (SPSS, SAS, Stata, R), as well as a built-in project calendar, a scheduling module, ad hoc reporting tools, and advanced features, such as branching logic, file uploading, and calculated fields.

Learn more about REDCap by watching a [brief summary video \(4 min\)](#). If you would like to view other quick video tutorials of REDCap in action and an overview of its features, please see the [Training Resources](#) page.

NOTICE: If you are collecting data for the purposes of human subjects research, review and approval of the project is required by your Institutional Review Board.

If you require assistance or have any questions about REDCap, please contact [REDCap Administrator \(123-456-7890\)](#).

Build online surveys and databases quickly and securely in your browser - Create and design your project using a secure login from any device. No extra software required. Access from anywhere, at any time.

Fast and flexible - Go from project creation to starting data collection in less than one day. Customizations and changes are possible any time, even after data collection has begun.

Advanced instrument design features - Auto-validation, calculated fields, file uploading, branching/skip logic, and survey stop actions.

Diverse and flexible survey distribution options - Use a list of email addresses or phone numbers for your survey respondents and automatically contact them with personalized messages, and track who has responded. Or create a simple link for an anonymous survey for mass email mailings, to post on a website, or print on a flyer.

Data quality - Use field validation, branching/skip logic, and Missing Data Codes to improve and protect data quality during data entry. Open data queries to automatically identify and resolve discrepancies and other issues real-time.

Custom reporting - Create custom searches for generating reports to view aggregate data. Identify trends with built-in basic statistics and charts.

Export data to common analysis packages - Export your data as a PDF or as CSV data for easy analysis in SAS, Stata, R, SPSS, or Microsoft Excel.

Secure file storage and sharing - Upload and share any type of file with anyone in the world through the File Repository feature or Send-It tool. Also

- 2) In "My Projects" page, you will see a list of all of your projects. Click on "New Project" on the top of the page.

REDCap Home My Projects **+ New Project** Help & FAQ Training Videos Send-It Messenger Control Center Logged in as mir131 Profile Log out

Listed below are the REDCap projects to which you currently have access. Click the project title to open the project. [Read more](#) To review which users still have access to your projects, visit the [User Access Dashboard](#).

Project Title	PID	Records	Fields	Instruments	Type	Status
Research Satisfaction Survey-TEST	19	9	45	1 survey		
REDCap Registration Form	34	0	20	1 survey		

REDCap 15.0.17 - © 2025 Vanderbilt University - [Cookie policy](#)

- 3) Fill in the requested information. Pick “Empty Project (blank slate)” and hit “Create Project”.

REDCap Home My Projects **+ New Project** Help & FAQ Training Videos Send-It Messenger Control Center Logged in as mir131 Profile Log out

+ Create a new REDCap Project

You may begin the creation of a new REDCap project on your own by completing the form below and clicking the Create Project button at the bottom.

Project title:

Project's purpose:

Project notes (optional):

Project creation option:

- Empty project (blank slate)
- Upload a REDCap project XML file (CDISC ODM format) ?
- Use a template (choose one below)

Choose a project template

select template	Template title (sorted by title)	Template description
<input type="radio"/>	Basic Demography	Single data collection instrument to capture basic demographic information.
<input type="radio"/>	Classic Database	Six data entry forms, including forms for demography and baseline data, three monthly data forms, and concludes with a completion data form.
<input type="radio"/>	Field Embedding Example Project	Example of the Field Embedding feature.
<input type="radio"/>	Human Cancer Tissue Biobank	Five data entry forms for collecting and tracking information for cancer tissue.
<input type="radio"/>	Longitudinal Database (1 arm)	Nine data entry forms (beginning with a demography form) for collecting data longitudinally over eight different events.
<input type="radio"/>	Longitudinal Database (2 arms)	Nine data entry forms (beginning with a demography form) for collecting data on two different arms (Drug A and Drug B) with each arm containing eight different events.

Create Project Cancel

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- 4) In the “Project Setup” page, under “main project settings”, enable the use of survey in your project.

REDCap Research Satisfaction Survey-ver1 PID: 36

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

Project status: Development Completed steps 0 of 7

Main project settings

- Use surveys in this project? ?
- Use longitudinal data collection with defined events? ?
- Use the MyCap participant-facing mobile app? ?

Design your data collection instruments

Enable optional modules and customizations

- Repeating instruments ?
- Auto-numbering for records ?
- Scheduling module (longitudinal only) ?
- Randomization module ?
- Designate an email field for communications (including survey invitations and alerts) ?
- Twilio SMS and Voice Call services for surveys and alerts ?
- Mosio SMS services for surveys and alerts ?
- SendGrid Template email services for Alerts & Notifications ?

Set up project bookmarks (optional)

- Click on the “Online Designer” under the “Design your data collection instruments & enable your surveys” section. This is the place where you can design your survey and add your questions.

The screenshot shows the REDCap interface for a project named "Research Satisfaction Survey-ver1". The left sidebar contains navigation menus for "Project Home and Design", "Data Collection", "Applications", "External Modules", and "Help & Information". The main content area is divided into several sections:

- Main project settings:** Includes options to "Use surveys in this project?", "Use longitudinal data collection with defined events?", and "Use the MyCap participant-facing mobile app?".
- Design your data collection instruments & enable your surveys:** This section is highlighted with a red box around the "Online Designer" button. It includes instructions on how to add or edit fields and provides links to "Download PDF of all Instruments" and "Data Dictionary".
- Enable optional modules and customizations:** Lists various optional features like "Repeating instruments", "Auto-numbering for records", and "Scheduling module".
- Set up project bookmarks (optional):** A section for configuring project bookmarks.

- Click in the “Enable” button under “instruments” list. Instruments are forms in REDCap, used for collecting data.

This screenshot shows the "Online Designer" interface. The top navigation bar includes "Project Home", "Project Setup", "Online Designer", "Data Dictionary", and "Codebook". Below the navigation, there are instructions on how to use the page and a "Create snapshot of instruments" button. The main section is titled "Data Collection Instruments" and contains a table with the following data:

Instrument name	Fields	PDF	Enabled as survey	Instrument actions	Survey related options
Form 1	1		<input checked="" type="checkbox"/> Enable	Choose action	

The "Enable" button in the "Enabled as survey" column for "Form 1" is highlighted with a red box. To the right of the table, there are "Form options" and "Survey options" sections with various configuration buttons like "PDF Snapshots", "Consent", "Survey Queue", "Form Display Logic", "Survey Login", "Survey Notifications", "PDF (all instruments)", and "Descriptive Popups".

- 7) In this page, you can find some basic survey settings, like the title that will be displayed to participants at the top of the survey page, survey instructions that will be displayed at top of survey after title, survey completion text which will be displayed after survey is completed as 'thank you' text or as acknowledgement text. You can add a logo, change font, etc. Customize this part based on your preference and hit “Save Changes” at the bottom of the screen.

The screenshot shows the 'Survey Setup' page in REDCap. The left sidebar contains navigation options like 'Project Home and Design', 'Data Collection', 'Applications', and 'External Modules'. The main content area is titled 'Research Satisfaction Survey-ver1' and includes a 'Set up my survey' button. Below this, there are sections for 'Survey Status' (set to 'Survey Active'), 'Basic Survey Options' (including 'Survey Title' and 'Survey Instructions'), and 'Survey Design Options' (including 'Width of survey on page').

- 8) You can later modify these in the Online Designer.

The screenshot shows the 'Online Designer' page in REDCap. The left sidebar is the same as in the previous screenshot. The main content area is titled 'Research Satisfaction Survey-ver1' and includes a 'Data Dictionary' button. Below this, there is a 'Data Collection Instruments' table with columns for 'Instrument name', 'Fields', 'PDS', 'Enabled in Survey', and 'Instrument actions'. The 'Form 1' instrument is highlighted, and the 'Enabled in Survey' checkbox is checked.

- 9) Click on the “Form 1” instrument. (you can rename it as well.) Here is where you can add your survey questions. They are called “Field”s in REDCap. Hit “Add Field” to add a new question.

The screenshot shows the REDCap Online Designer interface for a project named "Research Satisfaction Survey-ver1". The left sidebar contains navigation menus for "Project Home and Design", "Data Collection", "Applications", and "External Modules". The main content area provides instructions on how to create and edit data collection instruments. A specific field, "Record ID", is shown with its name and validation type. A red box highlights the "Add Field" button. On the right side, there are several help panels: "Learn how to use...", "How to embed a field elsewhere", "How to modify multiple fields together", and "Field Navigator".

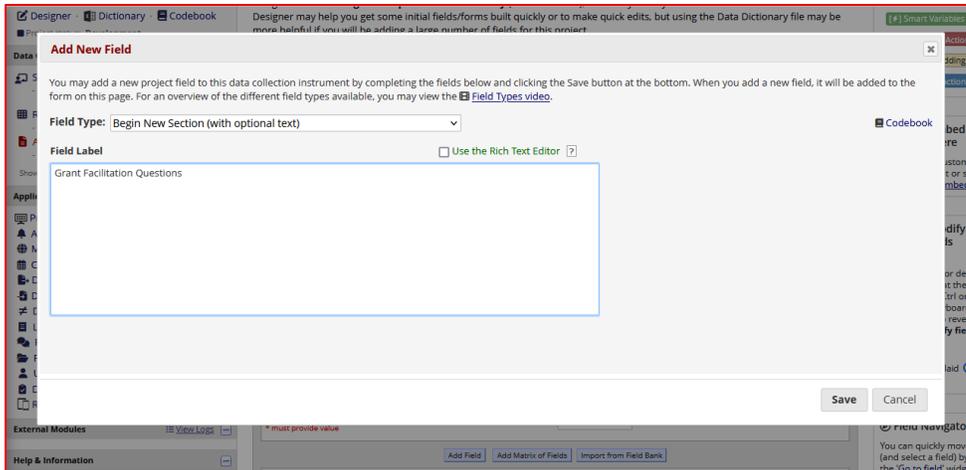
- 10) REDCap supports a variety of question types.

The screenshot shows the "Add New Field" dialog box in REDCap. The dialog has a title bar and a close button. It contains a message: "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." Below the message is a "Field Type:" dropdown menu with a list of options: "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)", and "Begin New Section (with optional text)".

11) In this picture you can see an example of a multiple choice drop-down list. You can write your question under “Field Label”, and the drop-down options under “Choices”, one choice per line. **All questions need to be assigned a variable name.** You can use this variable name to refer to this question later. For example, in branching logic, where you want to show a question **if** option number 3 of this multiple choice question is selected by the participant, this variable name comes handy (you will see examples later in this document). You can also set questions as required. Hit “save” when you are done.

The screenshot shows the 'Add New Field' dialog box in REDCap Messenger. The dialog is titled 'Add New Field' and contains several sections for configuring a new project field. The 'Field Type' is set to 'Multiple Choice - Drop-down List (Single Answer)'. The 'Question Number' is optional and empty. The 'Field Label' is 'What is your department?'. The 'Choices' section lists '1, Arts', '2, Engineering', and '3, Science'. The 'Variable Name' is 'department'. The 'Required?' checkbox is checked. The 'Identifier?' checkbox is unchecked. The 'Custom Alignment' is 'Right / Vertical (RV)'. The 'Field Note' is empty. There are 'Save' and 'Cancel' buttons at the bottom right.

12) If you pick “Begin New Section (with optional text)” field type, you can start a new section in your survey. These sections can be displayed in different pages in your survey and the participant can move through them using “Next Page” or “Previous Page” in the survey.



Current instrument: **Form 1**

Field Name: record_id

Record ID

Validation type: None

NOTE: The field above is the record ID field and thus cannot be deleted or moved. It can only be edited.

* This field will NOT be displayed on the survey page.
* You should NOT use identifiers (e.g., MRN, SSN) for the record ID field.

Add Field Add Matrix of Fields Import from Field Bank

Field Name: department

What is your department?

* must provide value

Add Field Add Matrix of Fields Import from Field Bank

Field Name: []

New section title

Grant Facilitation Questions

Add Field Add Matrix of Fields Import from Field Bank

Field Name: sat_grant

Provide your satisfaction rate for grant facilitation services

* must provide value

Change the slider above to set a response reset

Add Field Add Matrix of Fields Import from Field Bank

How multiple together

To copy, multiple time, ho key on y click the Quick feature.

Show: C

Field

You can (and sele the 'Go t (keyboard or CMD-G

Branching logic

You can use this functionality when you want to conditionally display a question based on something. For example, when a specific answer is selected for another question. Let's say we want to ask participants whether they have used our grant services. If yes, we want their satisfaction rate. If no, we want to ask for the reason. In order to do that, follow these steps:

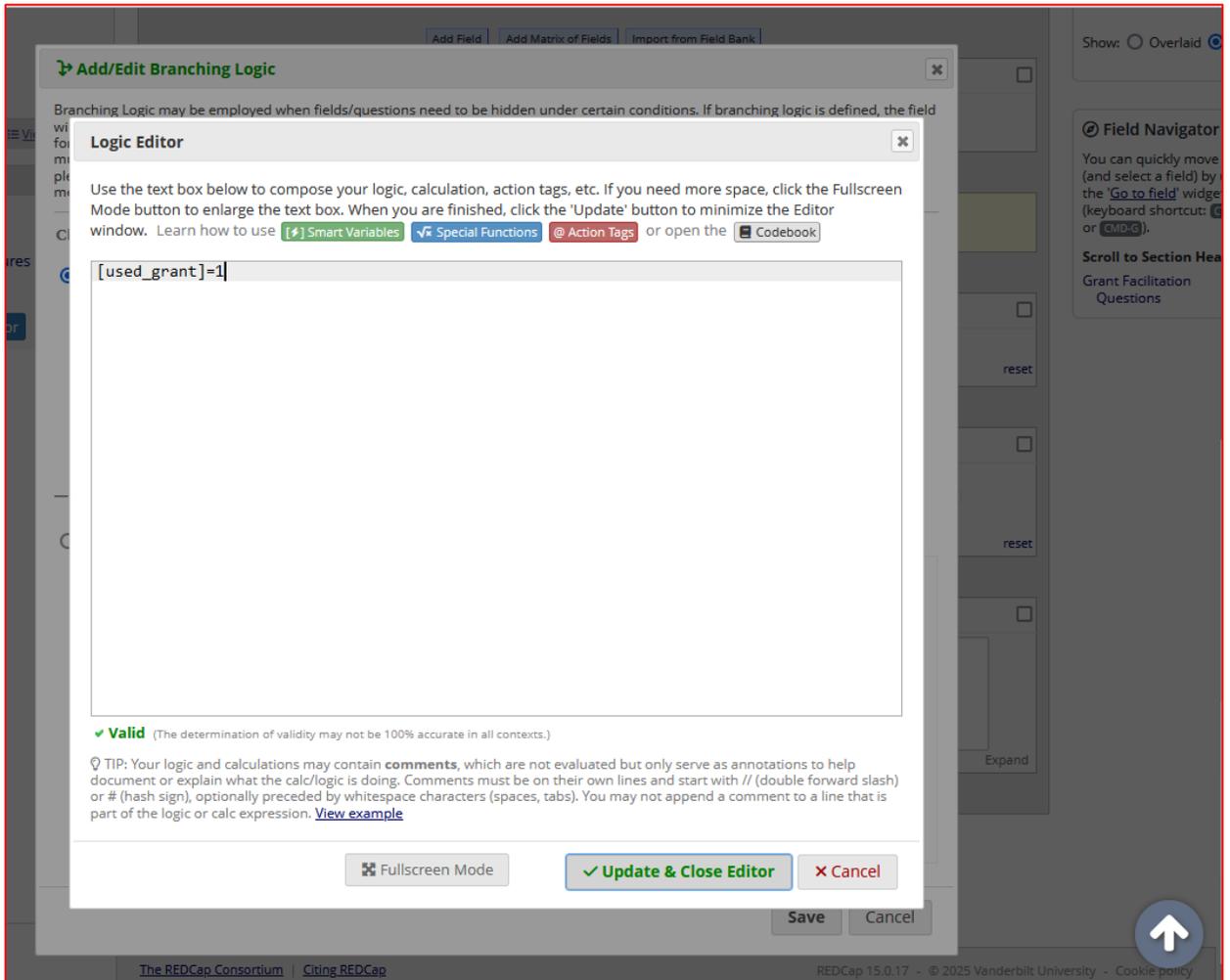
1. Click the green arrows for the branching logic on the field whose display you want to condition. In this example, “Provide your satisfaction rate for grant facilitation services” question.

The screenshot shows the REDCap question editor interface. It contains three question cards. The first card is for the question 'Have you used grant facilitation services?' with radio button options for 'Yes' and 'No'. The second card is for 'Provide your satisfaction rate for grant facilitation services' and features a slider control. The third card is for 'Please provide the reason why you didn't use it.' and has a text input area. A dark grey button labeled 'Edit Branching Logic' is positioned over the left side of the second question card. A red box highlights the green branching logic icon on the top left of the second question card.

2. Click on the “Show the field ONLY if” text box.

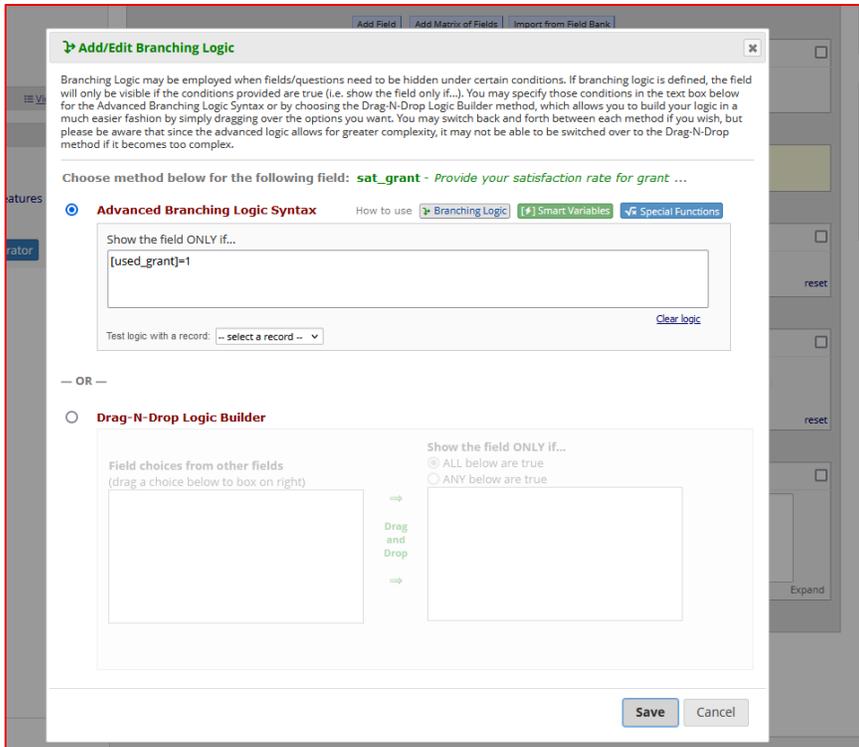
The screenshot shows the 'Add/Edit Branching Logic' dialog box. It provides instructions on how branching logic works and offers two methods: 'Advanced Branching Logic Syntax' and 'Drag-N-Drop Logic Builder'. The 'Advanced Branching Logic Syntax' method is selected. Under this method, there is a text box labeled 'Show the field ONLY if...' which is highlighted with a red box. Below this text box is a dropdown menu for 'Test logic with a record:' and a 'Clear logic' link. The 'Drag-N-Drop Logic Builder' method is also visible, showing options for 'Field choices from other fields' and 'Show the field ONLY if...' with radio button options for 'ALL below are true' and 'ANY below are true'. 'Save' and 'Cancel' buttons are at the bottom of the dialog.

3. Write your condition in the text box under logic editor. Follow this format:
[variable name] = specific value

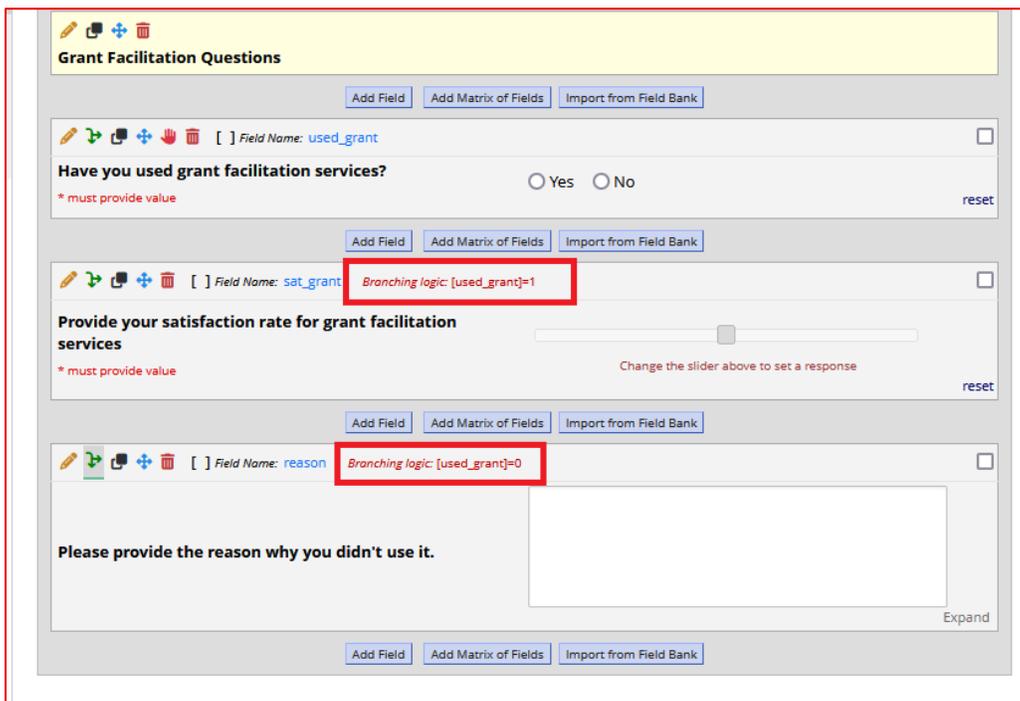


In this example, the variable name for question “Have you used grant facilitation services?” is “used_grant”. And we want to show the satisfaction rate question if “yes” is selected which is the value of “1”.

4. Hit “Update & Close Editor”. Then, “Save”.



5. You can repeat the same steps for the “Please provide the reason why you didn't use it.” And display it when “No” is selected for “Have you used grant facilitation services?”



Some Useful Functionalities

Here are some of the useful functionalities that you may need:

Adding a User to Your Project

If you need to grant somebody else access to your project, follow these steps:

1. Click on “User Rights” in the left-side menu under the “Applications” section.

The screenshot displays the REDCap interface. On the left, the 'Applications' menu is expanded, and 'User Rights' is highlighted with a red box. The main content area shows the 'Form 1' editor. At the top, there is a note about the 'Delete' icon and field reordering. Below this, there are buttons for 'Return to list of instruments' and 'Survey settings'. The current instrument is 'Form 1'. The form editor shows several fields: 'Record ID' (validation type: None), 'What is your department?' (validation type: * must provide value), 'Have you used grant facilitation services?' (validation type: * must provide value), and 'Provide your satisfaction rate for grant facilitation services' (validation type: * must provide value). Each field has 'Add Field', 'Add Matrix of Fields', and 'Import from Field Bank' buttons. The 'User Rights' menu item is highlighted in the left sidebar.

2. Start typing the user’s name under “Add new users” section in the User Rights window. If they have a REDCap account, their name will pop up and you can add them.

Research Satisfaction Survey-ver1 PID 36

Project Home | Project Setup | **User Rights** | Data Access Groups

This page may be used for granting users access to this project and for managing the user privileges of those users. You may also create roles to which you may assign users (optional). User roles are useful when you will have several users with the same privileges because they allow you to easily add many users to a role in a much faster manner than setting their user privileges individually. Roles are also a nice way to categorize users within a project. In the box below you may add/assign users or create new roles, and the table at the bottom allows you to make modifications to any existing user or role in the project, as well as view a glimpse of their user privileges.

Upload or download users, roles, and assignments ?

Add new users: Give them custom user rights or assign them to a role.

hanna + Add with custom rights
 htn405 (Hannah Nguyen) Assign new user to role + Assign to role

Create new roles: Add new user roles to which users may be assigned.

Enter new role name + Create role
 (e.g., Project Manager, Data Entry Person)

Role name (click role name to edit role)	Username or users assigned to a role (click username to edit or assign to role)	Expiration (click expiration date to edit)	Project Design and Setup	User Rights	Data Access Groups	Data Viewing Rights	Data Ex Right
—	mir131 (Mercedeh Irani)	never	✓	✓	✓	1 View & Edit	1 Full Dat

3. Then click on the username listed on the table on User Rights window, and hit “Edit user privileges” to manage their access level.

Project Home and Design

Project Home | Project Setup | Designer | Dictionary | Codebook

Data Collection

Survey Distribution Tools

Record Status Dashboard

Add / Edit Records

Applications

Project Dashboards

Alerts & Notifications

Multi-Language Management

Calendar

Data Exports, Reports, and Stats

Data Import Tool

Data Comparison Tool

Logging

Field Comment Log

File Repository

User Rights and DAGs

Data Quality

REDCap Mobile App

External Modules

Help & Information

Help & FAQ

Video Tutorials

Learn Advanced Design Features

Suggest a New Feature

Contact REDCap administrator

Upload or download users, roles, and assignments ?

Add new users: Give them custom user rights or assign them to a role.

Add new user + Add with custom rights
 — OR —
 Assign new user to role + Assign to role

Create new roles: Add new user roles to which users may be assigned.

Enter new role name + Create role
 (e.g., Project Manager, Data Entry Person)

Role name (click role name to edit role)	Username or users assigned to a role (click username to edit or assign to role)	Expiration	Project Design and Setup	User Rights	Data Access Groups	Data Viewing Rights	Data Ex Right
—	mir131 (Mercedeh Irani)		✓	✓	✓	1 View & Edit	1 Full Dat

User actions:

- Edit user privileges
- Assign to role
- Remove from project

The REDCap Consortium | Citing REDCap

REDCap 15

Editing existing user "mir131"

Basic Privileges

Expiration Date (if applicable) (M/D/Y)

Highest level privileges:

- Project Design and Setup
- User Rights No Access Read Only Full Access
- Data Access Groups

Other privileges:

- Survey Distribution Tools
- Alerts & Notifications
- Calendar
- Add/Edit/Organize Reports (Also allows user to view ALL reports (but not necessarily all data in the reports))
- Stats & Charts
- Data Import Tool
- Data Comparison Tool
- Logging
- Email Logging
- File Repository
- Data Quality (Create & edit rules, Execute rules) [What is Data Quality?](#)
- API (API Export, API Import/Update) [What is the REDCap API?](#)

Settings pertaining to the REDCap Mobile App:

- REDCap Mobile App (Allows user to...)

Privileges for Viewing and Exporting Data

Data Viewing Rights pertain to a user's ability to view or edit data on pages in the project (e.g., data entry forms, reports). Users with "No Access" Data Viewing Rights for a given instrument will not be able to view that instrument for any record, nor will they be able to view fields from that instrument on a report. Data Export Rights pertain to a user's ability to export data from the project, whether through the Data Exports page, API, Mobile App, or in PDFs of instruments containing record data. Note: Data Viewing Rights and Data Export Rights are completely separate and do not impact one another.

	Data Viewing Rights				Data Export Rights			
	No Access (Hidden)	Read Only	View & Edit	Edit survey responses	No Access	De-Identified*	Remove All Identifier Fields	Full Data Set
Form 1 (survey)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

* De-identified means that all free-form text fields will be removed, as well as any date/time fields and Identifier fields.

Setting Notifications

You can set notifications so that every time a response to your survey is received, you will be alerted. Follow these steps:

1. Click on "Alerts & Notifications" under "Applications" section on the left-side menu.

REDCap

Research Satisfaction Survey-ver1 PID 36

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

Project status: Development Completed steps 0 of 7

Logged in as mir131 | Log out

My Projects or Control Center

REDCap Messenger

Contact REDCap administrator

Project Home and Design

- Project Home
- Project Setup
- Designer
- Dictionary
- Codebook
- Project status: Development

Data Collection

- Survey Distribution Tools
- Record Status Dashboard
- Add / Edit Records

Applications

- Project Dashboards
- Alerts & Notifications**
- Multi-Language Management
- Calendar
- Data Exports, Reports, and Stats
- Data Import Tool
- Data Comparison Tool
- Logging
- Field Comment Log
- User Rights and DAGs
- Data Quality
- REDCap Mobile App

External Modules

Help & Information

- Help & FAQ

Main project settings

Not started

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

Modify project title, purpose, etc.

Design your data collection instruments & enable your surveys

Not started

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](#) [Special Functions](#)

Enable optional modules and customizations

Optional

- Enable Repeating instruments?
- 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 Twilio SMS and Voice Call services for surveys and alerts?
- Enable Mosio SMS services for surveys and alerts?
- Enable SendGrid Template email services for Alerts & Notifications?

Additional customizations

Get project bookmarks (optional)

2. Click on “Add New Alert”. Then you can set alert settings as you need.

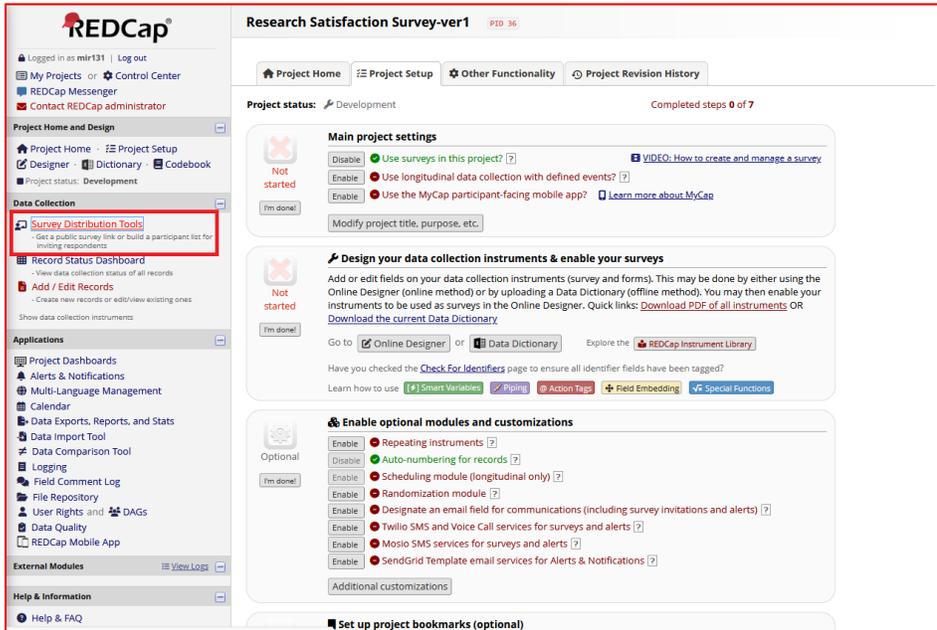
The screenshot shows the REDCap interface for a project named "Research Satisfaction Survey-ver1" (PID 36). The left sidebar contains navigation menus for "Project Home and Design", "Data Collection", "Applications", "External Modules", and "Help & Information". The main content area is titled "Alerts & Notifications" and includes a description of the feature. Below the description are two tabs: "My Alerts" and "Notification Log". A green button labeled "+ Add New Alert" is highlighted with a red box. To the right of this button is a "Re-evaluate Alerts" link. Further right, there is a dropdown menu for "Upload or download Alerts" and a checkbox for "Show 0 deactivated alert(s)".

The screenshot shows the "STEP 3: Message Settings" form. The "Alert Type" is set to "Email". The "Email From" field is populated with "mir131@uregina.ca". The "Email To" field is set to "research.ethics@uregina.ca". The "Subject" is "REDCap registration request". The "Message" field contains the text: "A new submission has been received for REDCap registration form." Below the message field, there is a checkbox for "Prevent piping of data for Identifier fields" which is checked. At the bottom, there is an "Add attachments" button. The right side of the form shows a preview of the message content.

Distributing the Survey

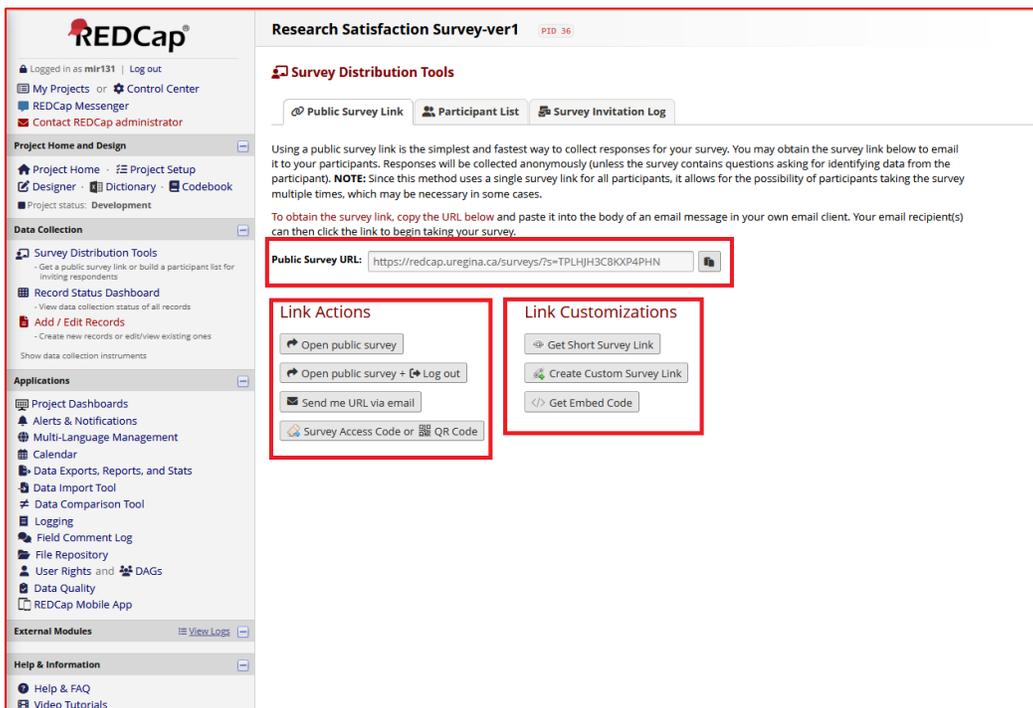
If you need a public link to your survey, you can find it here:

1. Click on “Survey Distribution Tools” under the “Data Collection” section on the left-side menu.



The screenshot shows the REDCap interface for a project named "Research Satisfaction Survey-ver1". The left sidebar is expanded to the "Data Collection" section, where "Survey Distribution Tools" is highlighted with a red box. The main content area shows the "Main project settings" section, which includes options to enable or disable surveys, longitudinal data collection, and mobile app usage. Below this, there are sections for "Design your data collection instruments & enable your surveys" and "Enable optional modules and customizations".

2. The window that opens will display the public link and other useful tools for distributing the survey.

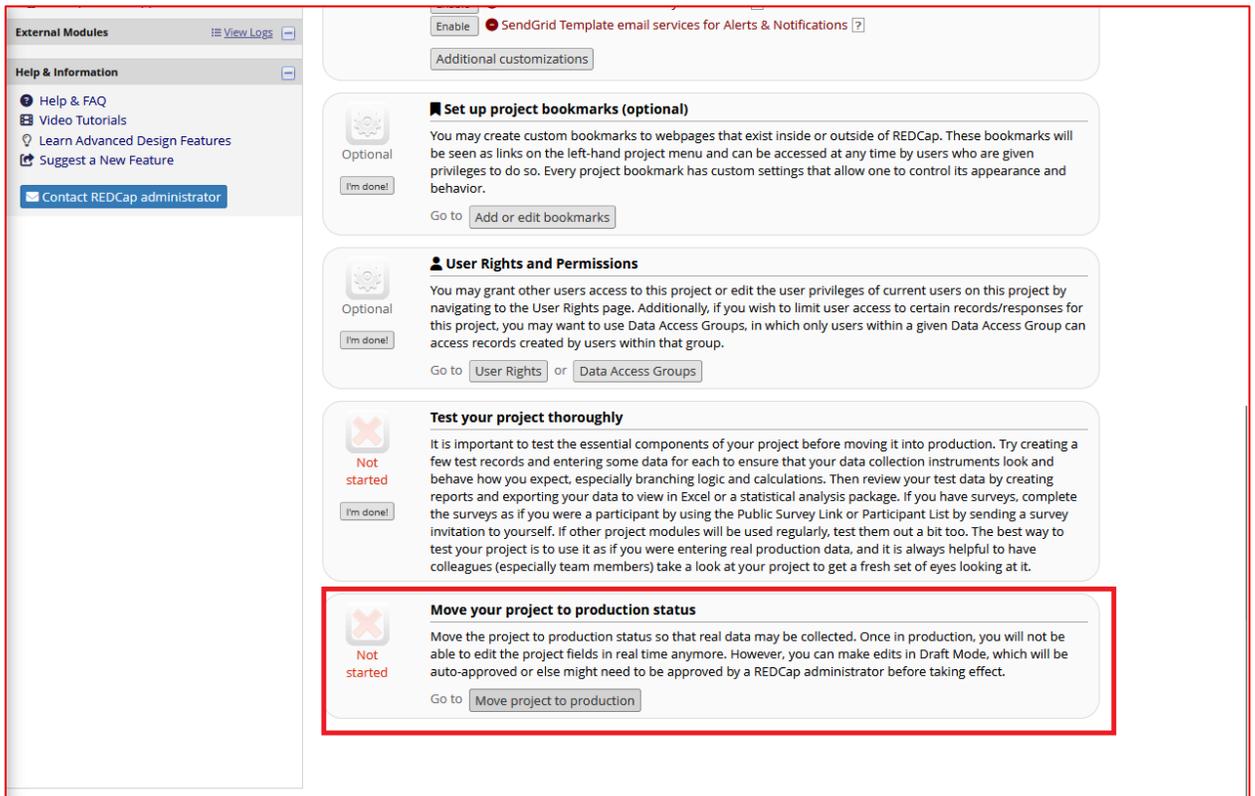


The screenshot shows the "Survey Distribution Tools" page in REDCap. The left sidebar is expanded to the "Survey Distribution Tools" menu item, which is highlighted with a red box. The main content area displays the "Public Survey Link" tab, which includes a "Public Survey URL" field containing the URL: `https://redcap.suregina.ca/surveys/?s=TPLJH3C8KX4PHN`. Below the URL, there are two sections: "Link Actions" and "Link Customizations". The "Link Actions" section includes buttons for "Open public survey", "Open public survey + Log out", "Send me URL via email", and "Survey Access Code or QR Code". The "Link Customizations" section includes buttons for "Get Short Survey Link", "Create Custom Survey Link", and "Get Embed Code".

Putting the Project into Production Mode

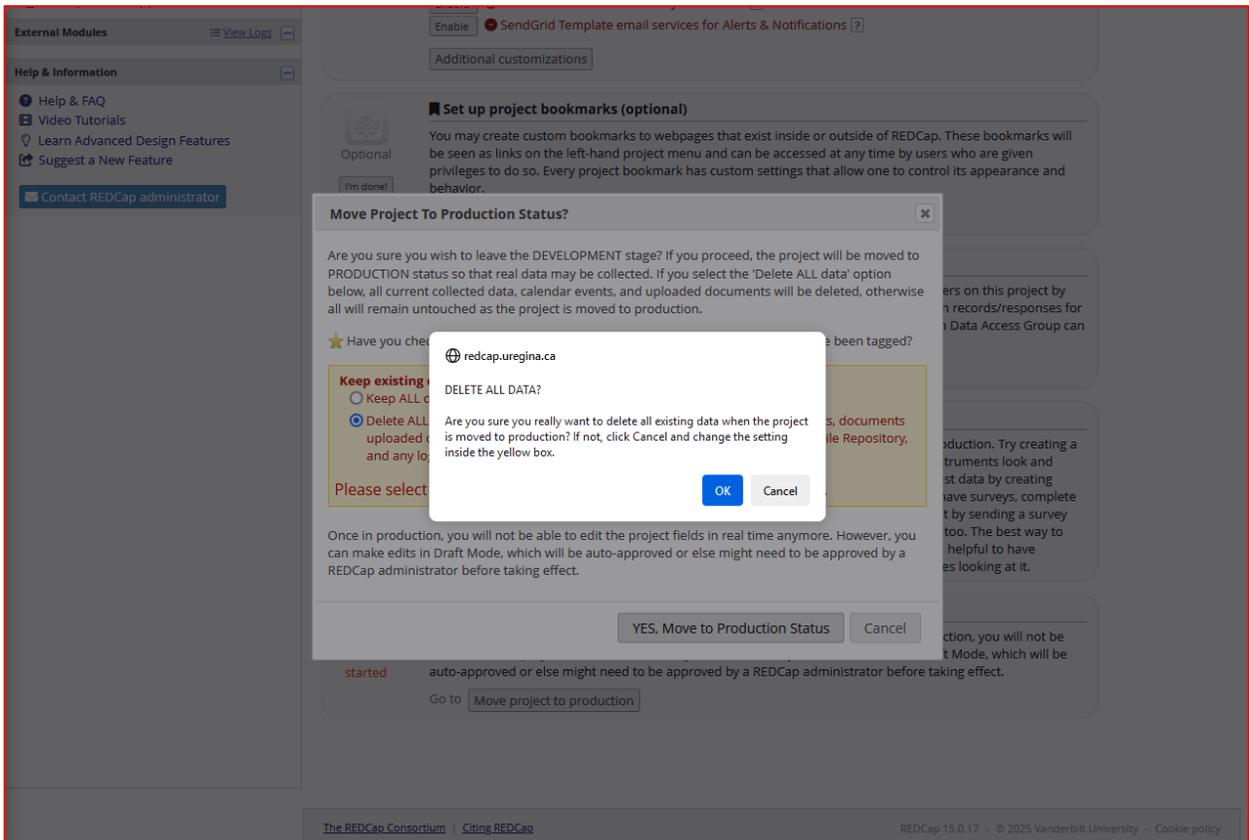
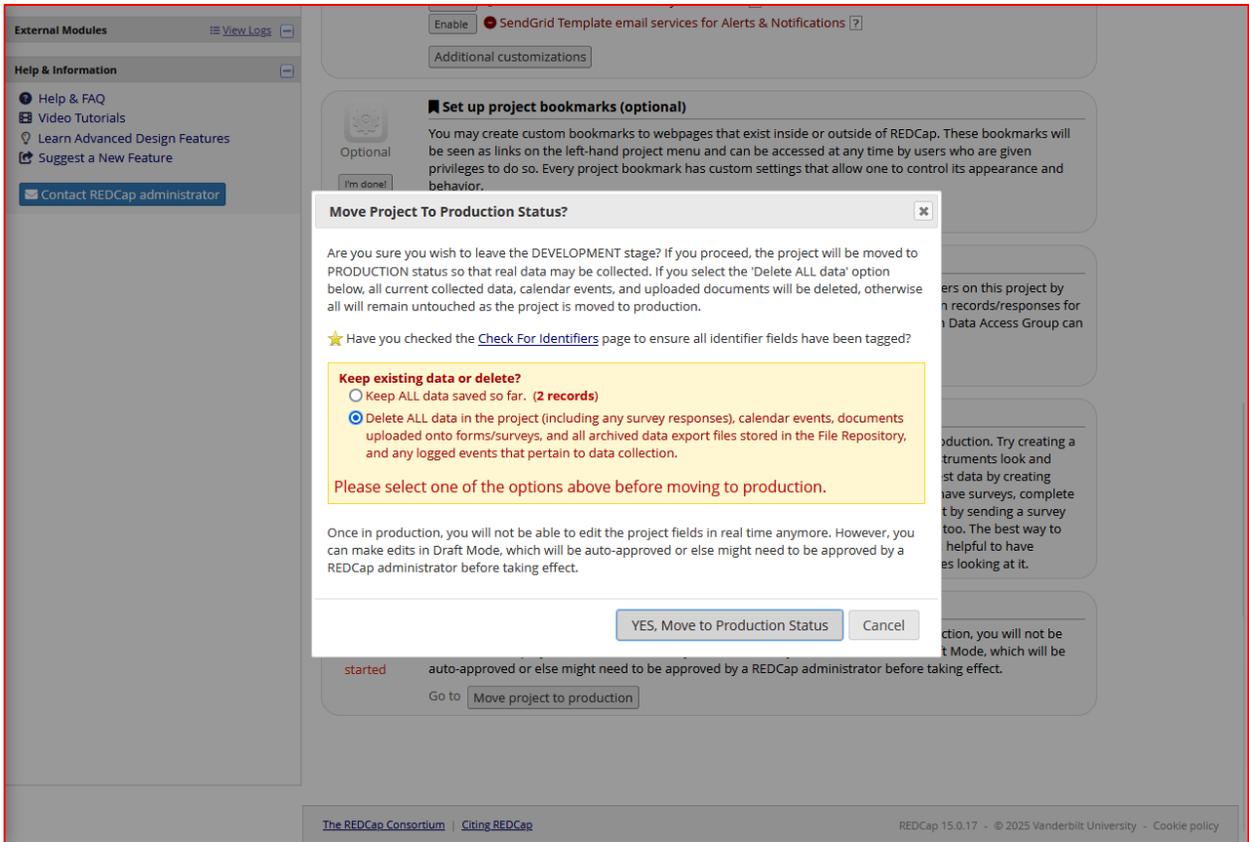
When you are done designing and testing your project, you should put it into production mode. Follow these steps to do that:

1. In the “Project Setup” page, scroll down to the “Move your project to production status”



The screenshot displays the REDCap Project Setup interface. On the left is a sidebar with 'External Modules' and 'Help & Information' sections. The main content area contains several configuration steps. The step 'Move your project to production status' is highlighted with a red border. This step includes a 'Not started' status icon, a description of the production mode, and a 'Move project to production' button. Other visible steps include 'SendGrid Template email services for Alerts & Notifications', 'Set up project bookmarks (optional)', and 'User Rights and Permissions'.

2. Select whether you want to keep the data entered during system testing (Development Mode) or delete it.



3. Your project is now moved to the production mode.

Research Satisfaction Survey-ver1 PID 36

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

Project status: Production Completed steps 2 of 7

Main project settings
 Some options below are disabled because they may not be modified once the project is in production status.
 Complete! Use surveys in this project? [?] [VIDEO: How to create and manage a survey](#)
 Use longitudinal data collection with defined events? [?]
 Use the MyCap participant-facing mobile app? [Learn more about MyCap](#)

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 or
 Learn how to use [Smart Variables](#) [Piping](#) [Action Tags](#) [Field Embedding](#) [Special Functions](#)

Enable optional modules and customizations
 Some options below are disabled because they may not be modified once the project is in production status.
 In progress Repeating instruments [?]
 Auto-numbering for records [?]
 Scheduling module (longitudinal only) [?]
 Randomization module [?]
 Designate an email field for communications (including survey invitations and alerts) [?]
 Twilio SMS and Voice Call services for surveys and alerts [?]
 Mosio SMS services for surveys and alerts [?]
 SendGrid Template email services for Alerts & Notifications [?]

Set up project bookmarks (optional)

4. You can still make changes to your project by going to the Online Designer page, even if it is in production mode.

Research Satisfaction Survey-ver1 PID 36

Project Home | Project Setup | **Online Designer** | Data Dictionary | Codebook

NOTE: The project is currently in PRODUCTION status, and thus changes cannot be made in real time to the project as when in Development status. However, changes to the project may be drafted in DRAFT MODE, after which such changes will be reviewed and approved by a REDCap administrator. Once those changes are approved, you will then receive an email confirmation informing you that those changes have taken effect on your production project.

Would you like to enter DRAFT MODE to begin drafting changes to the project?

[Share your instruments with others via the REDCap Shared Library](#) [VIDEO: How to use this page](#)

The Online Designer will allow you to make project modifications to fields and data collection instruments very easily using only your web browser. In order to make any modifications to your instruments listed below, you must first move the project into Draft Mode by clicking the 'Enter Draft Mode' button above. However, whether in Draft Mode or not, you are allowed to download the PDF or modify survey settings for any instruments below.

Data Collection Instruments

Form options: PDF Snapshots e-Consent Auto Invitation
 Form Display Logic Survey Notifications
 PDF (all instruments) Descriptive Popups

Instrument name	Fields	PDF	Enabled as survey	Instrument actions	Survey related options
Form 1	5	<input type="button" value="PDF"/>	<input checked="" type="checkbox"/>	Choose action	Survey settings <input type="button" value="Automated Invitations"/>

Viewing/Exporting Submissions or Entering Data Manually

1. You can find the responses to your survey by clicking on “Add/Edit Records” under “Data Collection” section from the left-side menu.

The screenshot shows the REDCap interface for a project titled "Research Satisfaction Survey-ver1" (PID 36). The user is logged in as "mir131". The left sidebar contains a menu with sections: "Project Home and Design", "Data Collection", "Applications", "External Modules", and "Help & Information". Under the "Data Collection" section, the "Add / Edit Records" option is highlighted with a red box. The main content area shows the project status as "Production" and "Completed steps 2 of 7". It includes sections for "Main project settings", "Design your data collection instruments & enable your surveys", and "Enable optional modules and customizations".

2. You can select the record that you want to see from the drop-down menu.

The screenshot shows the "Add / Edit Records" page in REDCap. The page title is "Add / Edit Records" and it includes the instruction: "You may view an existing record/response by selecting it from the drop-down lists below. To create a new record/response, click the button below." Below this, there is a section for "Total records: 1" and a "Choose an existing Record ID" field. A red box highlights a drop-down menu with the following options: "-- select record --", "-- select record --", and "1". Below this is a "Data Search" section with a "Choose a field to search" dropdown set to "All fields" and a "Search query" input field.

- By clicking on the green circle showing the status of the record, you can open the record.

REDCap
Logged in as mir131 | Log out
My Projects or Control Center
REDCap Messenger
Contact REDCap administrator

Project Home and Design
Project Home · Project Setup
Designer · Dictionary · Codebook
Project status: **Production**

Data Collection
Survey Distribution Tools
Record Status Dashboard
Add / Edit Records
Record ID 1 [Select other record](#)

Applications
Project Dashboards
Alerts & Notifications
Multi-Language Management
Calendar
Data Exports, Reports, and Stats
Data Import Tool
Data Comparison Tool
Logging
Field Comment Log
File Repository
User Rights and DAGs
Data Quality
REDCap Mobile App

External Modules [View Logs](#)

Help & Information
Help & FAQ
Video Tutorials
Learn Advanced Design Features
Suggest a New Feature

Research Satisfaction Survey-ver1 PID 36

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.

Legend for status icons:
● Incomplete ● Incomplete (no data saved) ?
● Unverified ● Partial Survey Response
● Complete ● Completed Survey Response

Choose action for record

Record ID 1

Data Collection Instrument	Status
Form 1 (survey)	●

- You can view and download the submission in the next page.

REDCap
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Designer · Dictionary · Codebook
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Record ID 1 [Select other record](#)

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Calendar
Data Exports, Reports, and Stats
Data Import Tool
Data Comparison Tool
Logging
Field Comment Log
File Repository
User Rights and DAGs
Data Quality
REDCap Mobile App

External Modules [View Logs](#)

Help & Information
Help & FAQ
Video Tutorials
Learn Advanced Design Features

Research Satisfaction Survey-ver1 PID 36

Actions: [Download PDF of instrument\(s\)](#) [Share instrument in the Library](#) [Video: Basic data entry](#)

- Form**
 - This survey (blank)
 - This survey with saved data
 - This survey with saved data (via browser's Save as PDF)
- Surv**
 - This survey with saved data (compact) initially started on 09/10/2025 8:06pm. The total completion time of the response is 8 seconds. You have not been given permission to edit survey responses. However, your permissions may be changed on the User Rights page in order to allow editing of survey responses. [View all contributors to this response.](#)

Record ID 1

Record ID 1

What is your department? * must provide value

Grant Facilitation Questions

Have you used grant facilitation services? Yes No * must provide value

Provide your satisfaction rate for grant facilitation services * must provide value

Form Status

Complete? * must provide value