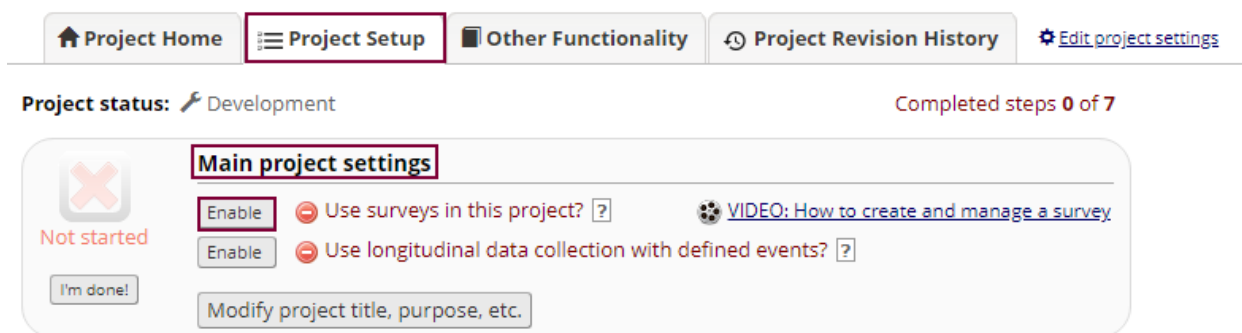


How to enable surveys on a REDCap Project

This document outlines how to enable surveys within a REDCap project and how to setup the initial Survey settings. This is a brief overview, if you require help with any of the settings in the survey setup please contact the support team at red-cap@unimel.edu.au with your questions.

Enable Survey

1. Log into REDCap
2. Select your required project from the 'My Projects' tab
3. On the 'Project Setup' tab under 'Main project settings' select the 'Enable' button next to 'Use surveys in this project?'



Project status: Development Completed steps 0 of 7

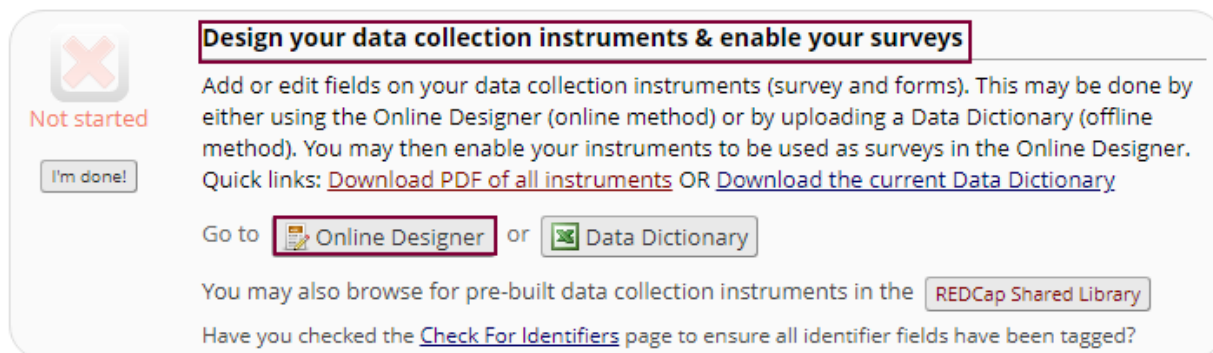
Main project settings

Not started [VIDEO: How to create and manage a survey](#)

Use surveys in this project?

Use longitudinal data collection with defined events?

4. Under the 'Design your data collection instrument & enable your surveys' select the 'Online Designer' button



Not started [REDCap Shared Library](#)

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?

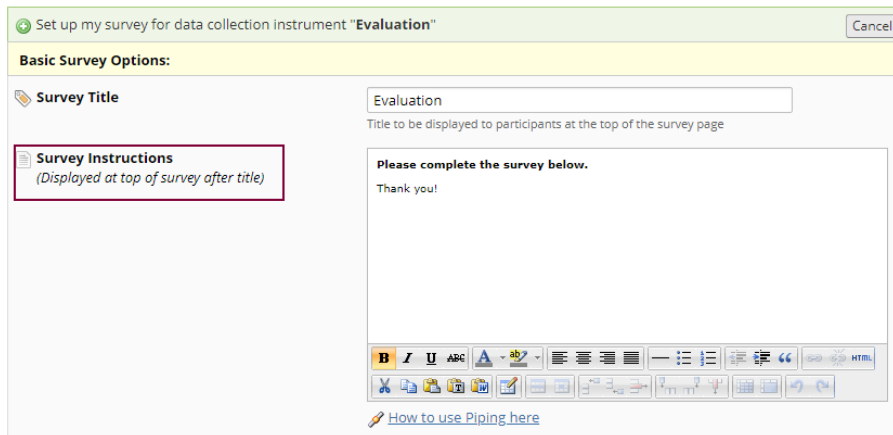
5. For the required Instrument, select the 'Enable' button under the 'Enabled a survey' column which is fourth from the left.

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	instrument ZIP file from another project/user or external libraries
Instrument name	Fields	View PDF	Enabled a survey	Instrument actions	Survey-related options
Participant Details	8		<input type="button" value="Enable"/>		
Assessment	13		<input type="button" value="Enable"/>		
Evaluation	4		<input type="button" value="Enable"/>		

REDCap How To guide

6. On the 'Set Up My Survey' tab that opens when enabling an instrument as a survey setup the settings for example:

- a. Survey Instructions



Set up my survey for data collection instrument "Evaluation" Cancel

Basic Survey Options:

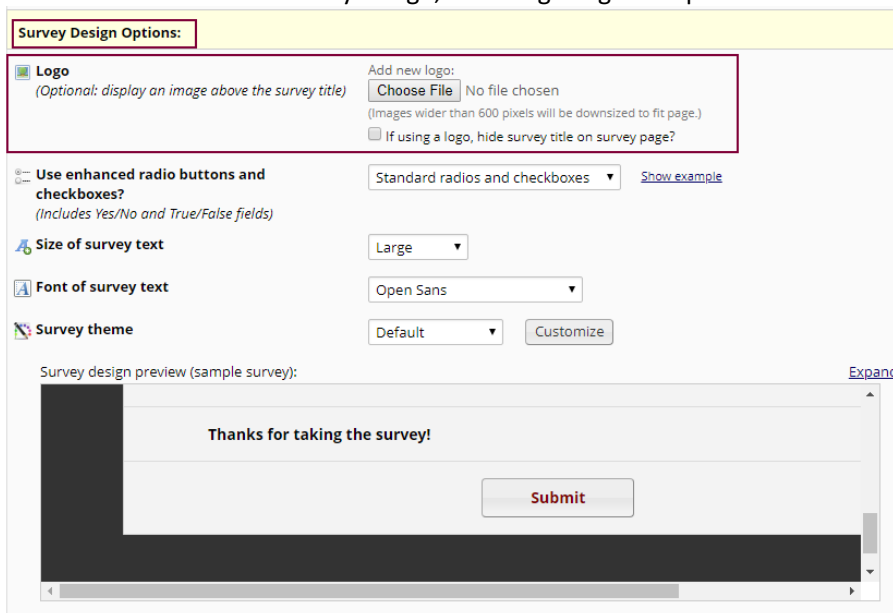
Survey Title
Evaluation
Title to be displayed to participants at the top of the survey page

Survey Instructions
(Displayed at top of survey after title)

Please complete the survey below.
Thank you!

[How to use Piping here](#)

- b. The look and feel of the survey design, including a logo if required



Survey Design Options:

Logo
(Optional: display an image above the survey title)

Add new logo:
Choose File No file chosen
(Images wider than 600 pixels will be downsized to fit page.)
☐ If using a logo, hide survey title on survey page?

Use enhanced radio buttons and checkboxes?
(Includes Yes/No and True/False fields)
Standard radios and checkboxes Show example

Size of survey text
Large

Font of survey text
Open Sans

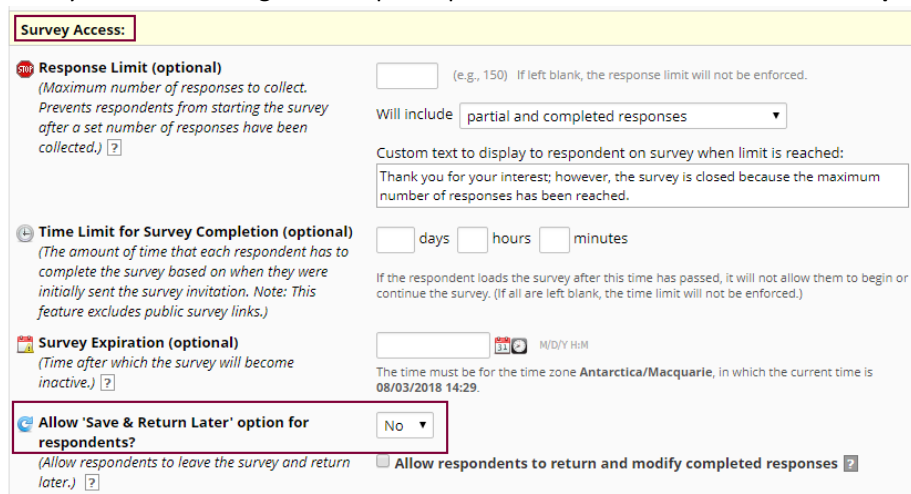
Survey theme
Default Customize

Survey design preview (sample survey): Expand

Thanks for taking the survey!

Submit

- c. Survey Access including to allow participants to 'Allow Save & Return Later option for respondents'



Survey Access:

Response Limit (optional)
(Maximum number of responses to collect. Prevents respondents from starting the survey after a set number of responses have been collected.) ?

(e.g., 150) If left blank, the response limit will not be enforced.

Will include

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)
(The amount of time that each respondent has to complete the survey based on when they were initially sent the survey invitation. Note: This feature excludes public survey links.)

days hours minutes

If the respondent loads the survey after this time has passed, it will not allow them to begin or continue the survey. (If all are left blank, the time limit will not be enforced.)

Survey Expiration (optional)
(Time after which the survey will become inactive.) ?

MM/DD/YYYY M/D/Y H:M

The time must be for the time zone Antarctica/Macquarie, in which the current time is 08/03/2018 14:29.

Allow 'Save & Return Later' option for respondents?
(Allow respondents to leave the survey and return later.) ?

☐ Allow respondents to return and modify completed responses ?

REDCap How To guide

d. Survey Completion Text

Survey Termination Options:

☐ **(Optional) Auto-continue to next survey:** Automatically start the next survey instrument after finishing this survey ⓘ


— OTHERWISE —

☐ **Redirect to a URL**
(Redirect to a webpage when survey is completed)
Provide a full URL, e.g. <http://www.example.com/mypage.html>
[How to use Piping here](#)


— OR —

☒ **Survey Completion Text**
(Displayed after survey is completed as 'thank you' text or as acknowledgement text)

Thank you for taking the survey.
Have a nice day!



[How to use Piping here](#)

 **Send confirmation email (optional)?**
(Email the respondent when they complete the survey)

Save Changes

-- Cancel--

- Once you are happy with your survey setting select the **'Save Changes'** button at the bottom of the screen.

Survey Termination Options:

☐ **(Optional) Auto-continue to next survey:** Automatically start the next survey instrument after finishing this survey ⓘ


— OTHERWISE —

☐ **Redirect to a URL**
(Redirect to a webpage when survey is completed)
Provide a full URL, e.g. <http://www.example.com/mypage.html>
[How to use Piping here](#)


— OR —

☒ **Survey Completion Text**
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[How to use Piping here](#)

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(Email the respondent when they complete the survey)

Save Changes

-- Cancel--