(0:00)

The Online Designer allows you to build and manage data collection instruments dynamically. It is just one way to define and interact with your project structure. That structure controls the content and functionality of webpages during data entry.

Users having project design and setup rights can create, rename, or delete instruments. The instruments displayed here directly define the data entry webpages. Building and managing instruments through the Online Designer defines how you interact with the webpages during data entry. This is an important and iterative process when developing any project.

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If surveys are enabled in the project, the Online Designer takes on additional functionality. Instruments can be individually designated as surveys. The survey settings are then defined.

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The Online Designer includes other survey-specific features. REDCap can send you an email notification when a new survey response arrives. It can even automatically send survey invitations to your respondents.

The Online Designer is not only where instruments are created and managed. It is also where the content of each instrument is customized. After opening an instrument, the data entry fields are displayed. This is where you define what kind of data is being collected. The Online Designer is the fastest and easiest way to add or modify fields.

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Choose the type of question, and complete the additional information to customize the new field. The field label is the question or descriptive text displayed on the instrument during data entry. Variables names are a keyword

or short phrase similar to the field label. Names must be unique within the project and follow certain formatting rules. The variable name is used in saving data, doing exports or reports, and advanced features like calculations or branching logic.

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All other information is optional. Text fields can be validated to ensure that data is entered in a consistent format. Making a field required will display a prompt if it is left blank during data entry. Fields marked as identifiers can only be exported by users having high enough permissions. Additional customizations are also available.

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Existing fields can be moved short distances using drag and drop. For longer distances, and to move a field to another instrument, use the Move icon.

Other icons help streamline instrument customization. The Edit icon opens an existing field to modify any aspect of it. The Copy icon creates a new field with the same field type and field label. The Delete icon will fully erase a field.

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Two advanced features defined in the Online Designer are matrix fields and branching logic.

Matrix fields capture data concisely by displaying a series of answer choices for multiple questions. Follow the built-in prompts and instructional text to define the matrix.

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Branching logic hides fields until certain criteria is met. In this example, answering the gender question "female" will reveal the field "given birth".

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The Online Designer cannot be used to test branching logic. The best way to test instruments is to enter practice data. It is truly critical to test the instruments during development because iterative changes are made immediately and are less likely to impact real project data. Using the Online Designer method of project modification is an iterative process. With a little practice, you will soon learn how to use this intuitive method of project development.