

Data Collection Instruments

+ Create

a new instrument from scratch

+ Import

a new instrument from the official [REDCap Instrument Library](#)

+ Upload

instrument ZIP file from another project/user or [external libraries](#)

Form options:

Form Display Logic

Survey Queue

Auto Invitation options

Survey Login

Survey Notifications

e-Consent and PDF Snapshots

Instrument name	Fields	View PDF	Enabled as survey	Instrument actions	Survey related options
Registration	4			Choose action	Survey settings + Automated Invitations
Withdrawal	1			Choose action	Survey settings + Automated Invitations
Renewal	2			Choose action	Survey settings + Automated Invitations

Project Setup

Define My Events

Designate Instruments for My Events

This application allows you to define 'events' for your project that allow for the **utilization of data collection forms multiple times for any given project record** (often used when collecting longitudinal data). An 'event' may be a temporal event in the course of your project, such as a participant visit or a task to be performed. After events have been defined, you will need to designate the data collection instruments that you wish to utilize for any or all events, thus allowing you to use a form for multiple events for the same project record. You may **group your events into 'arms'**, in which you may have one or more arms/groups for your project. Each arm can have as many events as you wish. You may use the table below to create new events and/or arms, or modify existing ones. (One arm and one event will be initially defined as the default for all projects.)

STEP #1:

To add new events below, provide an **Event Name** for that event, and then click the **Add new event**. Once events have been added, you can easily change their order by dragging and dropping the event using the up-down arrow icon on the far left for a given row in the table.

STEP #2:

Once you have defined your events on this page, you may navigate to the [Designate Instruments for My Events](#) page, where you may select which data collection instruments that you wish to utilize for each event you defined.

Upload or download arms/events

Arm 1: Registration

+Add New Arm

Arm name: **Registration**

[Rename Arm 1](#)

	Event # [event-number]	Event Label [event-label]	Custom Event Label [optional]	Unique event name (auto-generated) [event-name]	Event ID (auto-generated, unchangeable) [event-id]
	1	Registration		registration_arm_1	110770
	2	Renewal 2026 (y1)		renewal_2026_y1_arm_1	110771
	3	Renewal 2027 (y2)		renewal_2027_y2_arm_1	110772
	4	Renewal 2028 (y3)		renewal_2028_y3_arm_1	110773
	5	Renewal 2029 (y4)		renewal_2029_y4_arm_1	110774
	6	Renewal 2030 (y5)		renewal_2030_y5_arm_1	110775
Add new event Descriptive name for this event Custom Event Label (optional) Example: [visit_date], [weight] kg					

Spreadsheet download instrument mappings

Begin Editing

Save

Data Collection Instrument	Registration (1)	Renewal 2026 (y1) (2)	Renewal 2027 (y2) (3)	Renewal 2028 (y3) (4)	Renewal 2029 (y4) (5)	Renewal 2030 (y5) (6)
Registration (survey)						
Withdrawal (survey)						
Renewal (survey)						

Record Status Dashboard (all records)

Displayed below is a table listing all existing records/responses and their status for every data collection instrument (and if longitudinal, for every event). You may click any of the colored buttons in the table to open a new tab/window in your browser to view that record on that particular data collection instrument. Please note that if your form-level user privileges are restricted for certain data collection instruments, you will only be able to view those instruments, and if you belong to a Data Access Group, you will only be able to view records that belong to your group.

Legend

Dashboard displayed:

Default dashboard

Create custom

Displaying record

Page 1 of 1: "1" through "2"

 of 2 records

ALL (2)

 records

+ Add new record

Displaying: [Instrument status only](#) | [Lock status only](#) | [All status types](#)

Study ID	Registration		Renewal 2026 (y1)	Renewal 2027 (y2)	Renewal 2028 (y3)	Renewal 2029 (y4)	Renewal 2030 (y5)
	Registration	Withdrawal	Renewal	Renewal	Renewal	Renewal	Renewal
1							
2							

Study ID 1

Data Collection Instrument	Registration	Renewal 2026 (y1)	Renewal 2027 (y2)	Renewal 2028 (y3)	Renewal 2029 (y4)	Renewal 2030 (y5)
Registration (survey)						
Withdrawal (survey)						
Renewal (survey)						