



REDCap Administrative Guide

Reporting and Summarizing Data



PolicyWise
for Children & Families

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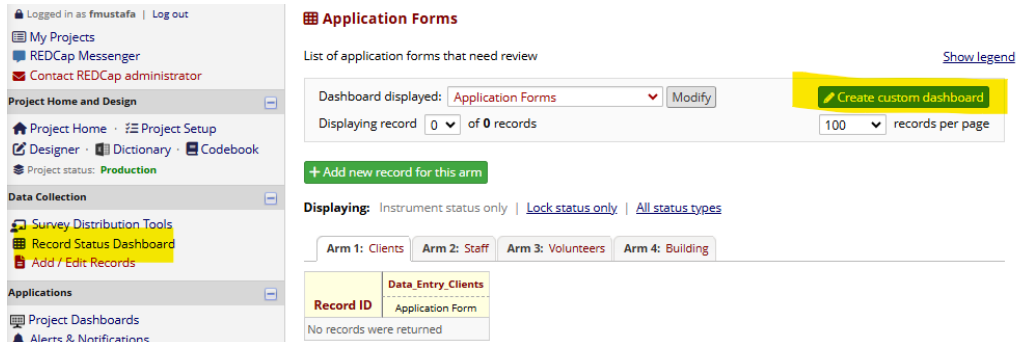
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Create or Modify a Dashboard

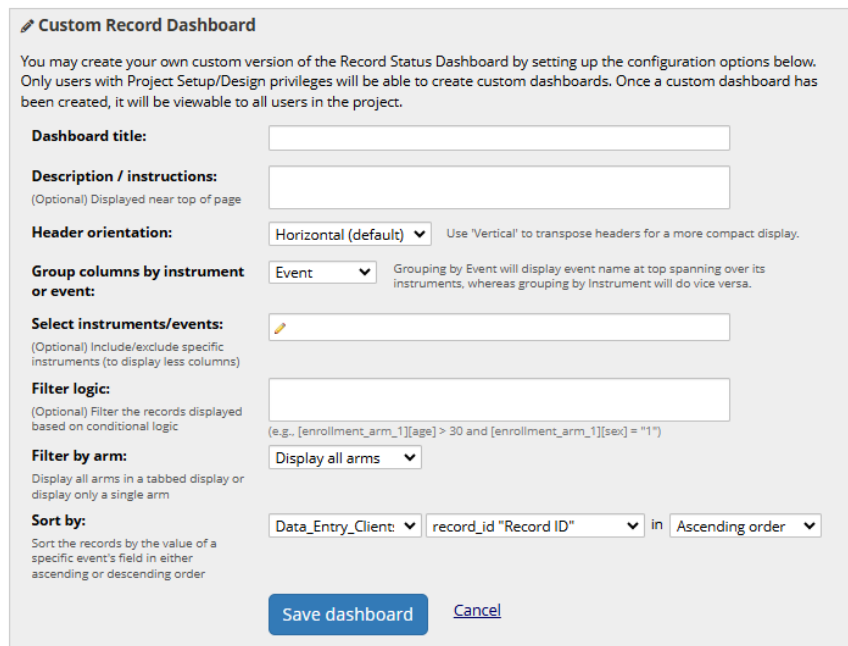
A dashboard is a specific custom view of data within the system. Existing dashboards may include Active Clients, Application Forms for all clients, or Incident Reports for all clients.

Create a New Dashboard

Open the Record Status Dashboard and select “Create custom dashboard.”



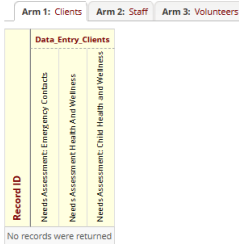
Complete the Custom Record Dashboard form with all of the required information. Details on each of the fields are below.



- **Dashboard title:** This is how the dashboard will be displayed in your list of available dashboards. Choose a title that is meaningful based on the purpose of the dashboard you are creating.
- **Description/instructions:** This will be displayed at the top of the dashboard when it is loaded. If you need to provide information to users about the records within the dashboard, you can do this here.

- **Header orientation:**

Vertical:



A vertical table with 'Record ID' as the first column and three rows of instrument names: 'Needs Assessment: Emergency Contacts', 'Needs Assessment: Health And Wellness', and 'Needs Assessment: Child Health and Wellness'. The table is titled 'Data_Entry_Clients' and has tabs for 'Arm 1: Clients', 'Arm 2: Staff', and 'Arm 3: Volunteers' at the top.

Horizontal:



A horizontal table with 'Record ID' as the first column and three columns of instrument names: 'Needs Assessment: Emergency Contacts', 'Needs Assessment: Health And Wellness', and 'Needs Assessment: Child Health and Wellness'. The table is titled 'Data_Entry_Clients' and has tabs for 'Arm 1: Clients', 'Arm 2: Staff', and 'Arm 3: Volunteers' at the top.

- **Group columns by instrument or event:** This allows you to choose how your dashboard is displayed. This field will almost always be Event.
- **Select instruments/events:** This is where you will identify which forms you would like to appear in the dashboard. If you are creating a dashboard about medical details, you would want any forms that contain details related to health and wellness, emergency contacts, medications, allergies, medical conditions, healthcare providers, etc. You can select as many or as few specific forms as you would like.

Custom Record Dashboard

You may create your own custom version of the Record Status Dashboard by setting up the configuration options below. Only users with Project Setup/Design privileges will be able to create custom dashboards. Once a custom dashboard has been created, it will be viewable to all users in the project.

Dashboard title: Medical Information

Description / instructions: (Optional) Displayed near top of page

Header orientation: Horizontal (default) Use 'Vertical' to transpose headers for a more compact display.

Group columns by instrument or event: Event Grouping by Event will display event name at top spanning over its instruments, whereas grouping by Instrument will do vice versa.

Select instruments/events: [data_entry_clients_arm_1]needs_assessment_emergency_contact_

Filter logic: (Optional) Filter the records displayed based on conditional logic

Filter by arm: Display all arms in a tabbed display or display only a single arm

Sort by: Sort the records by the value of a specific event's field in either ascending or descending order

+ Add new record for this arm

Displaying: Instrument status only

Select instruments/events to display in dashboard:

Update Cancel select all deselect all

Arm 1: Clients **Arm 2: Staff** **Arm 3: Volunteers** **Arm 4: Building**

☐ Data_Entry_Clients ☐ Data_Entry_Staff ☐ Data_Entry_Volunteers ☐ Data_Entry_Building

☐ Application Form ☐ Staff Incident Report ☐ Volunteer: Incident Report ☐ Building: Incident Report

☐ Consent Form: Services ☐ Building: Staff Notes

☐ Consent Form: Collection and Use of Data

☐ Program Progress Tracker

☐ Needs Assessment: Client Contact Info

☒ Needs Assessment: Emergency Contacts

☐ Needs Assessment: Background Information

☒ Needs Assessment: Housing

☒ Needs Assessment: Health And Wellness

☐ Needs Assessment: Pregnancy

☒ Needs Assessment: Child Health and Wellness

☐ Needs Assessment: Parenting

☐ Needs Assessment: Relationships and Supports

☐ Needs Assessment: Employment/School/Income

☐ Needs Assessment: Legal Concerns

☐ Program: Resources: Counselling and Therapy

☐ Program: Resources: Pre and Post Natal Support

- **Filter Logic (optional):** If you want the dashboard to show you only records that meet specific criteria, you can use this Logic Editor to enter those parameters. You may want only records that were entered after a specific date, or only records for clients that have not left the program, for example. You could enter [pexit_date]=0 if you only want records for which there is no planned exit date entered into the planned exit form.
- **Filter by arm:** If you only want to include records from the Staff Arm, or only from the Client Arm, you can select that here.
- **Sort by:** You can select the Arm and Field to use as the sort criteria and specify ascending or descending order for the display.

Once you have determined all your settings, select “Save dashboard.” You can then display the dashboard to confirm you are seeing the correct records. Click on “Modify” beside the dashboard name at the top to make further changes.

Medical Information [Show legend](#)

Dashboard displayed: **Medical Information** [Modify](#) [Create custom dashboard](#)

Displaying record **0** of **0** records **100** records per page

Custom Record Dashboard

You may create your own custom version of the Record Status Dashboard by setting up the configuration options below. Only users with Project Setup/Design privileges will be able to create custom dashboards. Once a custom dashboard has been created, it will be viewable to all users in the project.

Dashboard title:

Description / instructions:

(Optional) Displayed near top of page

Header orientation: **Horizontal (default)** Use 'Vertical' to transpose headers for a more compact display.

Group columns by instrument or event: **Event** Grouping by Event will display event name at top spanning over its instruments, whereas grouping by Instrument will do vice versa.

Select instruments/events:

(Optional) Include/exclude specific instruments (to display less columns)

Filter logic:
 (Optional) Filter the records displayed based on conditional logic
 (e.g., [enrollment_arm_1][age] > 30 and [enrollment_arm_1][sex] = "1")

Filter by arm: **Display all arms**
 Display all arms in a tabbed display or display only a single arm

Sort by: **Data_Entry_Client** **record_id "Record ID"** in **Ascending order**
 Sort the records by the value of a specific event's field in either ascending or descending order

[Save dashboard](#) [Cancel](#) [Delete dashboard](#)

Modify an Existing Dashboard

To make changes to an existing Dashboard, open the Record Status Dashboard and choose the dashboard you would like to modify from the dropdown list. Once the dashboard has loaded, click “Modify” beside the dashboard name.

Exit Forms

Dashboard displayed: **Exit Forms** [Modify](#)

Displaying record **0** of **0** records

[+ Add new record for th](#)

Displaying: Instrument: **Exit Forms** [status types](#)

Arm 1: Clients **Arm** [Building](#)

Record ID **Data_Entry** **Exit: Un** **Planned Un**

No records were returned

- Active Clients
- Application Forms
- Applied but rejected or withdrew
- Consent Forms
- Exit Forms**
- Incident Reports
- Intake Clients
- Medical Information
- Needs Assessments
- Old Clients
- Outcomes
- Program Forms
- Waitlisted Clients

Reports, stats, and charts

You can create customized reports to show you a snapshot of your data at any time. To begin the process of building reports, open the Data Exports, Reports and Stats section of the left sidebar.

My Projects

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

Applications

Project Dashboards

Alerts & Notifications

Multi-Language Management

Calendar

Data Exports, Reports, and Stats

Data Import Tool

Data Comparison Tool

Logging and Email Logging

File Repository

User Rights and DAGs

Data Quality and Resolve Issues

+ Create New Report

My Reports & Exports

Other Export Options

This module allows you to easily view reports of your data, inspect plots and descriptive statistics of your data, as well as export your data to Microsoft Excel, SAS, Stata, R, or SPSS for analysis (if you have such privileges). If you wish to export your "entire" data set or view it as a report, then Report A is the best and quickest way. However, if you want to view or export data from only specific instruments (or events) on the fly, then Report B is the best choice. You may also create your own custom reports below (if you have such privileges) in which you can filter the report to specific fields, records, or events using a vast array of filtering tools to make sure you get the exact data you want. Once you have created a report, you may view it as a webpage, export it out of REDCap in a specified format (Excel, SAS, Stata, SPSS, R), or view the plots and descriptive statistics for that report.

My Reports & Exports					
	Report name	View/Export Options	Management Options	Report ID (auto-generated)	Unique report name (auto-generated)
A	All data (all records and fields)	View Report Export Data Stats & Charts			
B	Selected instruments and/or events (all records)	Make custom selections			
1	test	View Report Export Data Stats & Charts	Edit Copy Delete	27	R-589HDDA4J8
+ Create New Report					

You can see any existing reports that have been previously created. For each report, you have the option to view the report, export data, or see stats & charts.

My Reports & Exports					
	Report name	View/Export Options	Management Options	Report ID (auto-generated)	Unique report name (auto-generated)
A	All data (all records and fields)	View Report Export Data Stats & Charts			
B	Selected instruments and/or events (all records)	Make custom selections			
1	test	View Report Export Data Stats & Charts	Edit Copy Delete	27	R-589HDDA4J8
+ Create New Report					

Record ID record_id	Event Name redcap_event_name	Repeat Instrument redcap_repeat_instrument	Repeat Instance redcap_repeat_instance	Survey Identifier redcap_survey_identifier	Survey Timestamp application_form_timestamp	Today's Date appform_todaysdate
8 Person 1	Data_Entry_Clients (Arm 1: Clients)					06-11-2024
8 Person 1	Data_Entry_Clients (Arm 1: Clients)	Program: Case Notes	1			
8 Person 1	Data_Entry_Clients (Arm 1: Clients)	Program: Case Notes	2			
8 Person 1	Data_Entry_Clients (Arm 1: Clients)	Program: Case Notes	3			

Exporting "All data (all records and fields)"

Select your export settings, which includes the export format (Excel/CSV, SAS, SPSS, R, Stata) and if you wish to perform de-identification on the data set.

Choose export format

☐



CSV / Microsoft Excel (raw data)

☐



CSV / Microsoft Excel (labels)

☐



SPSS Statistical Software

☐



SAS Statistical Software

☐



R Statistical Software

☐



Stata Statistical Software

☐



CDISC ODM (XML)

De-identification options (optional)

The options below allow you to limit the amount of sensitive information that you are exporting out of the project. Check all that apply.

Known Identifiers:

☐ Remove All Identifier Fields (tagged in Data Dictionary)

☐ Hash the Record ID field (converts record name to an unrecognizable value)

Free-form text:

☐ Remove unvalidated Text fields (i.e. Text fields other than dates, numbers, etc.)

☐ Remove Notes/Essay box fields

Date and datetime fields:

☐ Remove all date and datetime fields

— OR —

☐ Shift all dates by value between 0 and 364 days (shifted amount determined by algorithm for each record)

What is date shifting?

☐ Also shift all survey completion timestamps by value between 0 and 364 days (shifted amount determined by algorithm for each record)

[Deselect all options](#)

Additional export options

☒ Export survey identifier field and survey timestamp field(s)?

Advanced data formatting options

Export blank values for gray Form Status?

All Form Status fields with a gray status icon can be exported either as a blank value or as "0" (Incomplete). Hint: Blank values are recommended if the data will be imported back into REDCap, in which this preserves the gray status icons for all the imported records.

Export gray Form Status fields with value of "0" ▾

Set CSV delimiter character

Set the delimiter used to separate values in the CSV data file (only valid for CSV Raw Data and CSV Labels export formats):

(, comma) - default ▾

Force all numbers into a specified decimal format?

You may choose to force all data values containing a decimal to have a specified decimal character (comma or period/full stop). This will be applied to all calculations and number-validated text values in the export file.

Use fields' native decimal format (default) ▾

NOTE: Your data formatting selections above will be remembered in the future and will be pre-selected upon your next export.

Export Data

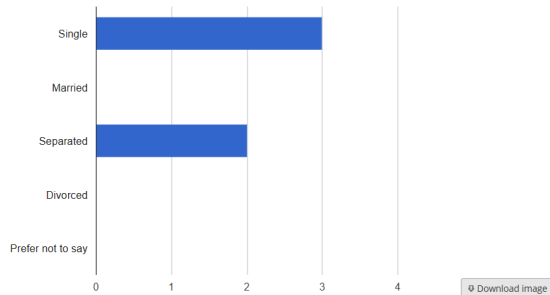
Cancel

If you select Stats & Charts, you will see summary statistics tables and graphs on the data in the report you have selected. Later sections of this manual delve in more detail into the stats and charts function.

Relationship Status (*appform_rel*) [Refresh Plot](#) | [View as Bar Chart](#) ▼

Total Count (N)	Missing*	Unique
5	0 (0,0%)	2

Counts/frequency: Single (3, 60,0%), Married (0, 0,0%), Separated (2, 40,0%), Divorced (0, 0,0%), Prefer not to say (0, 0,0%)



* Note: Values listed as 'Missing' may include records with a Missing Data Code (if Missing Data Codes are defined).

Creating a New Report

From the main Data Exports, Reports and Stats section, select “Create New Report,” as shown below.

Data Exports, Reports, and Stats

[VIDEO: How to use Data Exports, Reports, and Stats](#)

[+ Create New Report](#)

[My Reports & Exports](#)

[Other Export Options](#)

This module allows you to easily view reports of your data, inspect plots and descriptive statistics of your data, as well as export your data to Microsoft Excel, SAS, Stata, R, or SPSS for analysis (if you have such privileges). If you wish to export your *entire* data set or view it as a report, then Report A is the best and quickest way. However, if you want to view or export data from only specific instruments (or events) on the fly, then Report B is the best choice. You may also create your own custom reports below (if you have such privileges) in which you can filter the report to specific fields, records, or events using a vast array of filtering tools to make sure you get the exact data you want. Once you have created a report, you may view it as a webpage, export it out of REDCap in a specified format (Excel, SAS, Stata, SPSS, R), or view the plots and descriptive statistics for that report.

My Reports & Exports					
	Report name	View/Export Options	Management Options	Report ID (auto-generated)	Unique report name (auto-generated)
A	All data (all records and fields)	View Report Export Data Stats & Charts			
B	Selected instruments and/or events (all records)	Make custom selections			
1	test	View Report Export Data Stats & Charts	Edit Copy Delete	27	R-589HDDA4j8
	+ Create New Report				

If you select “custom user access,” it will provide you with the option of limiting access to certain users in the system or limiting access by user roles. It is important to think carefully about the data that will be in the report and to limit access to the report if it contains identifying information such as client name, date of birth or other identifiers. You can define who views the report as well as who has edit access. Edit access restrictions can ensure that unauthorized individuals are not able to make changes to the data in your report.

The screenshot displays the REDCap report configuration interface. On the left is a sidebar with navigation links: Data Import Tool, Data Comparison Tool, Logging and Email Logging, File Repository, User Rights and DAGs, Data Quality and Resolve Issues, reports (active), test, External Modules, View Logs, and Help & Information. The main content area is divided into two steps.

STEP 1

User Access: Choose who can edit and view this report

View Access: Choose who sees this report on their left-hand project menu [?]
☐ All users
☒ Custom user access (Users in ANY groups selected below will have access)

Selected users: fmustafa (Fatima Mustafa), kharah.ross (Kharah Ross)
 Selected user roles: Case Managers, Data Guardian, Family Support Worker, New

View a list of users who will have access to this report based on the selections above: View user access list

Edit Access: Choose who can edit, copy, or delete this report (requires user to have 'Add/Edit/Organize Reports' privileges)
☒ All users
☐ Custom user access (Choose specific users, roles, or data access groups who will have access)

STEP 2

Fields to include in report + Quick Add
 Add all fields from selected instrument: -- choose instrument --

Field	Field Label	Instrument
Field 1	record_id "Record ID"	Application Form
Field 2	Type variable name or field label	

Additional report options (optional)

- ☐ Include the survey identifier field and survey timestamp field(s)?
- ☐ Combine checkbox options into single column of only the checked-off options (will be formatted as a text field when exported to stats packages)
- ☒ Include the repeating instance fields (redcap_repeat_instrument, redcap_repeat_instance) in the report and data export?
- ☒ Remove line breaks/carriage returns from all text data values (only applicable for CSV Raw and CSV Label data exports)

In the report header, display the field label, variable, or both (not applicable for exports)? Both

In the report's data, display the field label, raw data value, or both for multiple choice fields (not applicable for exports)? Both

In Step 2, select the fields to include in your report. You can select fields across multiple forms, or multiple fields on the same form.

This section shows the 'Fields to include in report' configuration. It includes a table for selecting fields and a list of optional report options.

Field	Field Label	Instrument
Field 1	record_id "Record ID"	Application Form
Field 2	Type variable name or field label	

Additional report options (optional)

- ☐ Include the survey identifier field and survey timestamp field(s)?
- ☐ Combine checkbox options into single column of only the checked-off options (will be formatted as a text field when exported to stats packages)
- ☒ Include the repeating instance fields (redcap_repeat_instrument, redcap_repeat_instance) in the report and data export?
- ☒ Remove line breaks/carriage returns from all text data values (only applicable for CSV Raw and CSV Label data exports)

In the report header, display the field label, variable, or both (not applicable for exports)? Both

In the report's data, display the field label, raw data value, or both for multiple choice fields (not applicable for exports)? Both

There are multiple ways to add fields. You can type in the field name. You could use a pull-down menu to pick the fields you want to include, like below:

The screenshot shows the 'STEP 2' configuration screen for a report. Under 'Fields to include in report', there are two fields: 'Field 1' and 'Field 2'. 'Field 1' is currently empty, and 'Field 2' is set to 'appform_firstname "First Name"'. A pull-down menu is open next to 'Field 2', showing a list of available fields including 'appform_lastname "Last Name"', 'appform_phonenum "Please share a contact number where we can reach you"', 'appform_email "E-mail Address"', 'appform_currentaddress "Current Address (if applicable)"', 'appform_dob "Date of Birth"', 'appform_currentage "Current age:(as of today's date)"', 'appform_guardian1 "Do you have a legal guardian (i.e., someone leg... for your care)?"', 'appform_guardian_2 "If yes, are there safety concerns contacting your guardian?"', 'appform_guardian_3 "Please provide contact details for your guardia... your guardian."', 'appform_gender "Gender"', and 'appform_imm "Immigration Status"'. Below this, the 'Additional report options (optional)' section includes checkboxes for including survey identifier fields, combining checkbox options, including repeating instance fields, and removing line breaks. There are also dropdowns for displaying field labels, variables, or both in the report header and data.

Finally, you can include all fields in a particular instrument by using the “Add all fields from selected instrument” option and then using the pull-down menu to pick the relevant instrument.

This screenshot shows the same 'STEP 2' configuration screen, but with the 'Add all fields from selected instrument' option selected. The 'Field 1' dropdown now shows 'record_id "Record ID"'. The 'Field 2' dropdown is set to '-- select a field --'. The pull-down menu for 'Field 2' is open, showing a list of instruments including 'Application Form', 'Consent Form: Services', 'Consent Form: Collection and Use of Data', 'Program Progress Tracker', 'Needs Assessment: Client Contact Info', 'Needs Assessment: Emergency Contacts', 'Needs Assessment: Background Information', 'Needs Assessment: Housing', 'Needs Assessment: Health And Wellness', 'Needs Assessment: Pregnancy', 'Needs Assessment: Child Health and Wellness', 'Needs Assessment: Parenting', 'Needs Assessment: Relationships and Supports', 'Needs Assessment: Employment/School/Income', 'Needs Assessment: Legal Concerns', 'Program: Resources: Counselling and Therapy', and 'Program: Resources: Pre and Post Natal Support'.

In Step 3, you can apply any filters you would like to your data. In REDCap, there are two types of filters for reports:

1. **Static Filters:** These are predefined at the backend and cannot be altered during report viewing, ensuring a fixed data subset is always shown.
2. **Dynamic Filters:** These can be adjusted directly while viewing the report, allowing users to modify the displayed data interactively.

First, REDCap asks you to define the static filters that you will use to subset the data for your report. You can use operators to select data that is below or above a certain value, as in the example below. In the screenshot below, the data is filtered by date and includes all records from 1st January 2024 to 6th November 2024. You can also filter data by categories for categorical fields. For example, you can filter the data by application status so you only see active clients, as in filter 3 below.

STEP 3

☒ Show data for all events or repeating instruments/events for each record returned [How to use filters and AND/OR logic](#)

Filters (optional)

Filter	Operator / Value
Filter 1 appform_todaysdate "Today's Date" RM in All events	<= 06-11-2024 RM D-M-Y
AND	
Filter 2 appform_todaysdate "Today's Date" RM in All events	>= 01-01-2024 RM D-M-Y
AND	
Filter 3 appform_client_c4 "" RM in All events	is checked Accepted
AND	
Filter 4 Type variable name or field label RM in All events	

☐ Switch format: [Use advanced logic](#)

TIP: Use [X-instance] Smart Variables to filter repeating data.
 • Show only repeating instance data: [current-instance] <> ""
 • Show only the first repeating instance: [current-instance] <> "" and [current-instance] = [first-instance]

Once you select your static filters, you can also define live filters. These filters will appear at the top of your actual report, and you will be able to update these filters while you are viewing the report.

Live Filters (optional)

Live Filters can be selected on the report page for dynamically filtering data in real time. With the exception of the Record ID field, only multiple choice fields can be used as Live Filters (as well as Events, if longitudinal, and Data Access Groups, if any exist).

Live Filter 1	-- select a field --
Live Filter 2	-- select a field --
Live Filter 3	-- select a field --

For example, you could set gender as your live filter so that when you are viewing your report, you can select different genders and see specific data for each gender. You can select multiple live filters for your report.

Live Filters (optional)

Live Filters can be selected on the report page for dynamically filtering data in real time. With the exception of the Record ID field, only multiple choice fields can be used as Live Filters (as well as Events, if longitudinal, and Data Access Groups, if any exist).

Live Filter 1	appform_gender "Gender"
Live Filter 2	-- select a field --
Live Filter 3	-- select a field --

The final step in setting up a report is to select the order of the data that appears in the report. You can select the fields by which the data is sorted and then determine whether the data will be sorted by ascending or descending order.

STEP 4

Order the Results (optional)

First by	record_id "Record ID" RM	Ascending order
Then by	Type variable name or field label RM	Ascending order
Then by	Type variable name or field label RM	Descending order

Once you have finished, click Save Report. Your report will load so you can see the outcome. You can always return to make changes to the parameters you set by clicking on “Edit Report” at the top of the page.

Data Exports, Reports, and Stats [VIDEO: How to use Data Exports, Reports, and Stats](#)

+ Create New Report My Reports & Exports Other Export Options View Report: test

Number of results returned: 5
Total number of records queried: 10
(records = total available data across all designated events)
Report execution time: 0.1 seconds

Stats & Charts Export Data Print Page Edit Report

Live filters: [Gender]

test

Search

Record ID	Event Name	Repeat Instrument	Repeat Instance	First Name	Last Name	Gender	Immigration Status	Relationship Status
8 Person 1	Data_Entry_Clients (Arm 1: Clients)			Person 1		Female	Canadian citizen	Single
9 Person 2	Data_Entry_Clients (Arm 1: Clients)			Person 2		Non-binary	Canadian citizen	Single
10 Person 3	Data_Entry_Clients (Arm 1: Clients)			Person 3		Female	Refugee	Single
11 Person 4	Data_Entry_Clients (Arm 1: Clients)			Person 4		Female	Canadian citizen	Separated
12 Person 5	Data_Entry_Clients (Arm 1: Clients)			Person 5		Female	Canadian citizen	Separated

Stats and Charts

Once you have set up your report, you can look at summary statistics and charts tied to the data presented in your report. To do this, click on “Stats & Charts” at the top of your report.

Data Exports, Reports, and Stats [VIDEO: How to use Data Exports, Reports, and Stats](#)

+ Create New Report My Reports & Exports Other Export Options View Report: test

Number of results returned: 5
Total number of records queried: 11
(records = total available data across all designated events)
Report execution time: 0.2 seconds

Stats & Charts Export Data Print Page Edit Report

Live filters: [Gender]

test

Search

Record ID	Event Name	Repeat Instrument	Repeat Instance	First Name	Last Name	Gender	Immigration Status	Relationship Status
8 Person 1	Data_Entry_Clients (Arm 1: Clients)			Person 1		Female	Canadian citizen	Single
9 Person 2	Data_Entry_Clients (Arm 1: Clients)			Person 2		Non-binary	Canadian citizen	Single
10 Person 3	Data_Entry_Clients (Arm 1: Clients)			Person 3		Female	Refugee	Single
11 Person 4	Data_Entry_Clients (Arm 1: Clients)			Person 4		Female	Canadian citizen	Separated
12 Person 5	Data_Entry_Clients (Arm 1: Clients)			Person 5		Female	Canadian citizen	Separated

This will load some relevant graphs and summary statistics for your data, such as below. You can download these graphs and use them for your grants and report writing if needed.

