REDCap USER GUIDE

REDCap Administrative Guide

Reporting and Summarizing Data

PolicyWise for Children & Families

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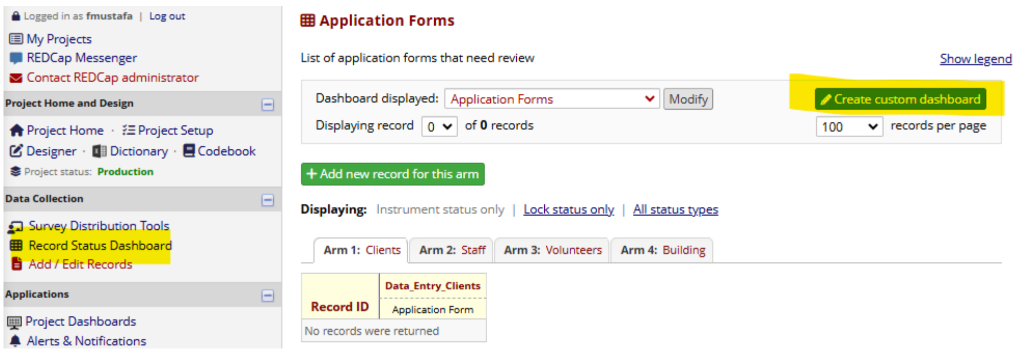
Create or Modify a Dashboard

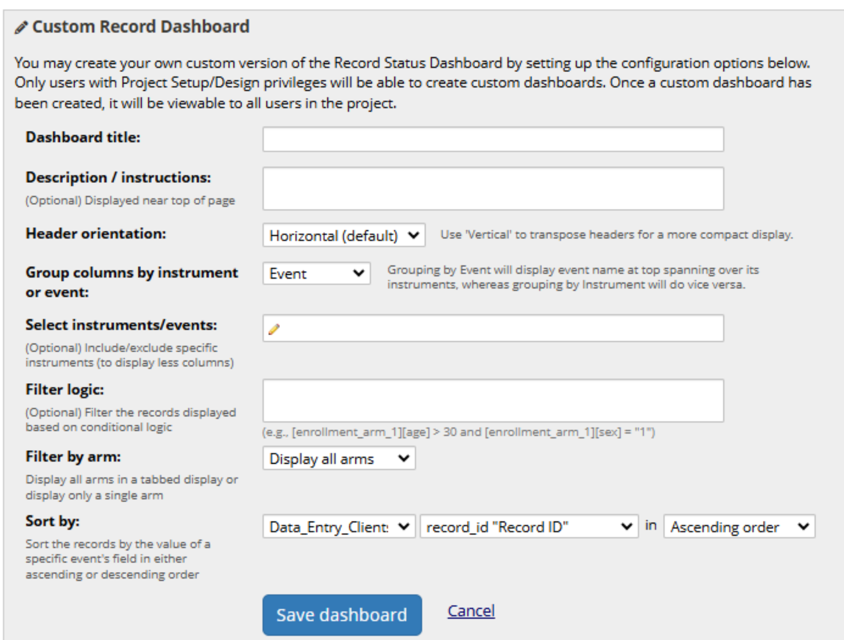
A dashboard is a specific custom view of data within the system. Existing dashboards may include Active Clients, Application Forms for all clients, or Incident Reports for all clients.

Create a New Dashboard

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

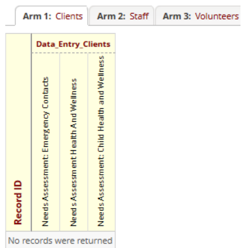


Complete the Custom Record Dashboard form with all of the required information. Details on each of the fields are below.



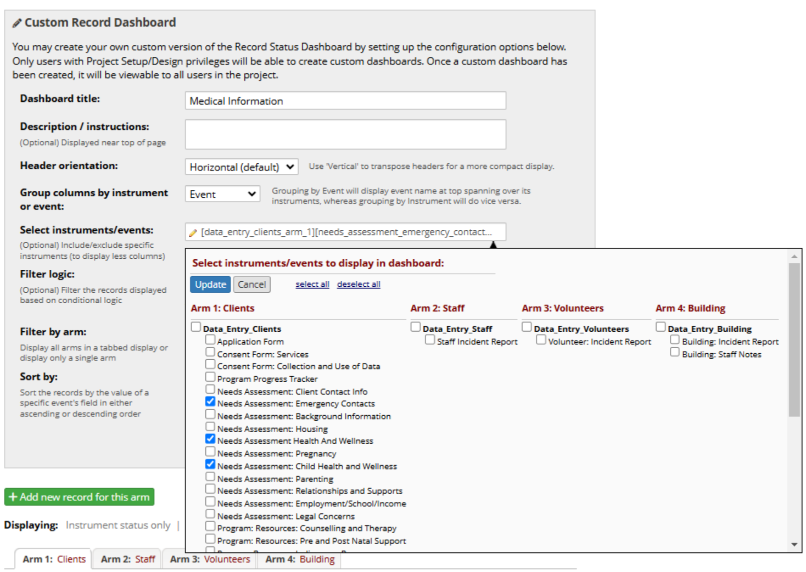
- **Dashboard title:** This is how the dashboard will be displayed in your list of available dashboards. Choose a title that is meaningful based on the purpose of the dashboard you are creating.
- **Description/instructions:** This will be displayed at the top of the dashboard when it is loaded. If you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

- **Header orientation:**

Vertical: 

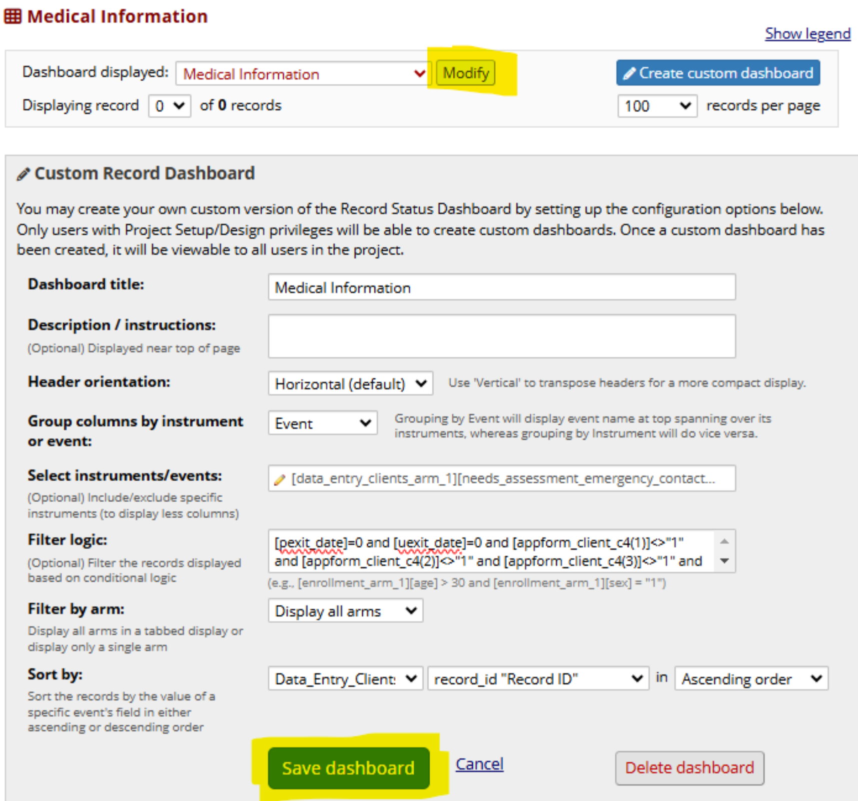
Horizontal: 

- **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.



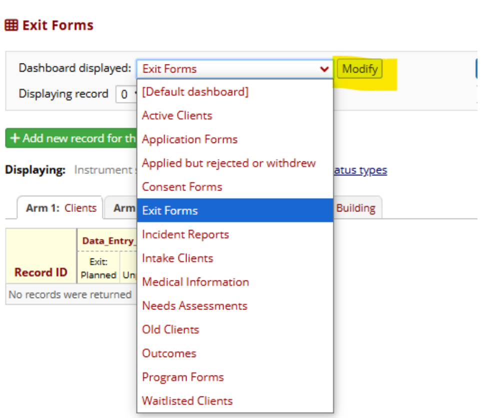
- **Filter Logic (optional):** If you want the dashboard to show you only records that meet specific criteria, you can use this Logic Editor to enter those parameters. You may want only records that were entered after a specific date, or only records for clients that have not left the program, for example. 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.



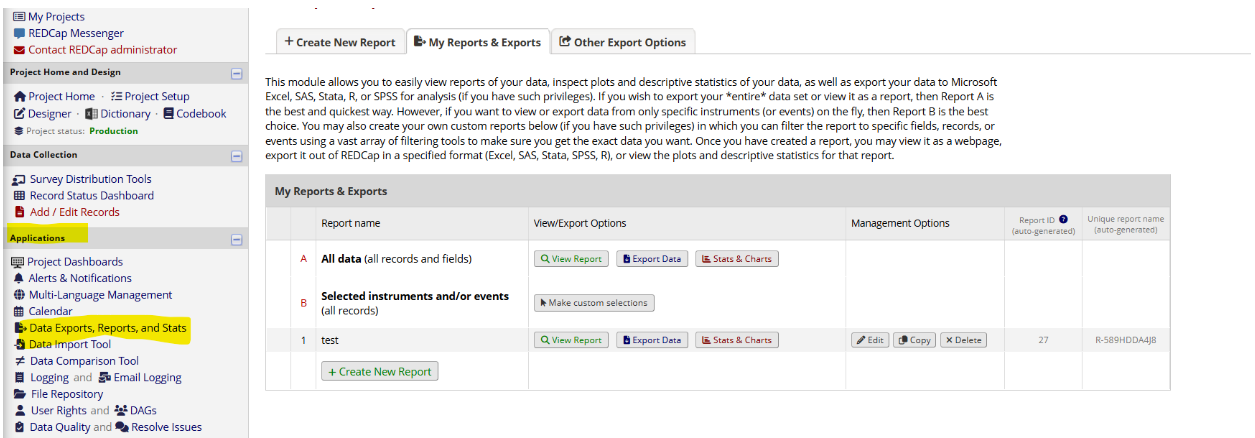
Modify an Existing Dashboard

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.

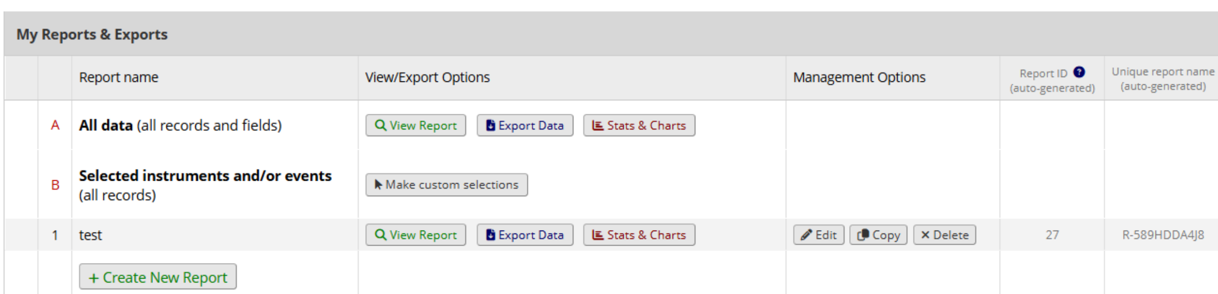


Reports, stats, and charts

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.



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.



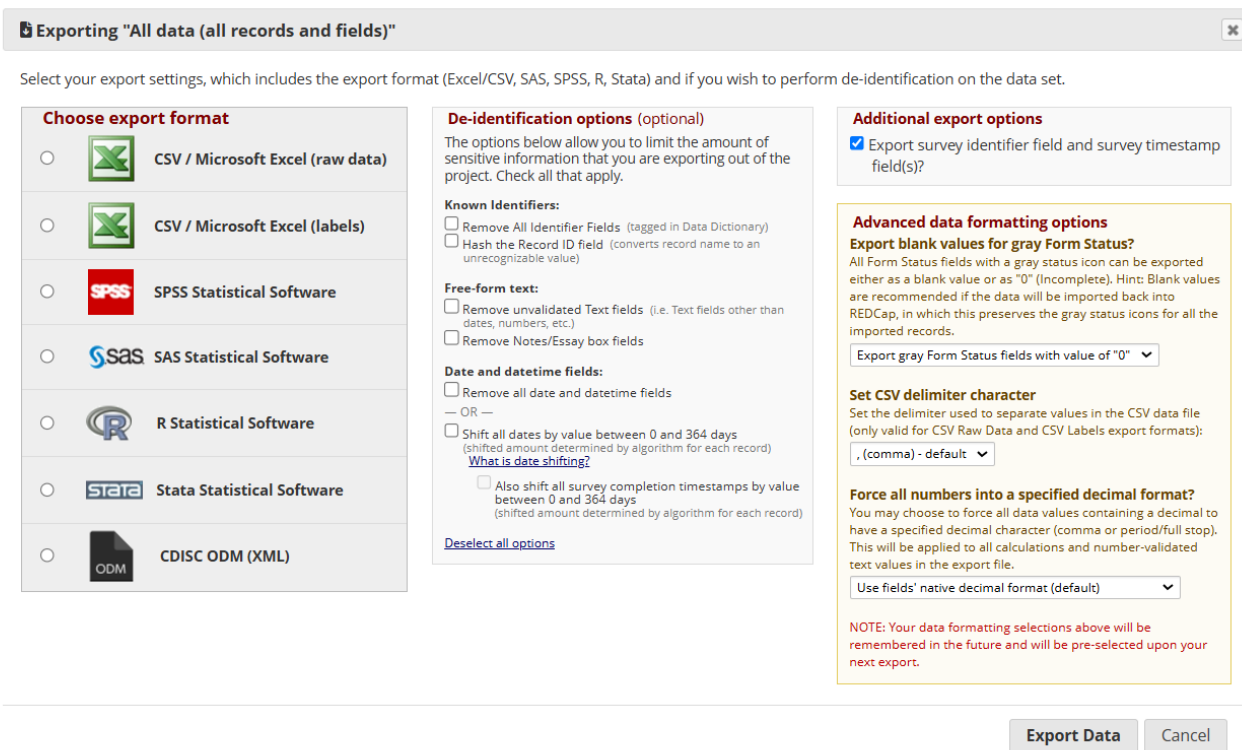
My Reports & Exports

	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				

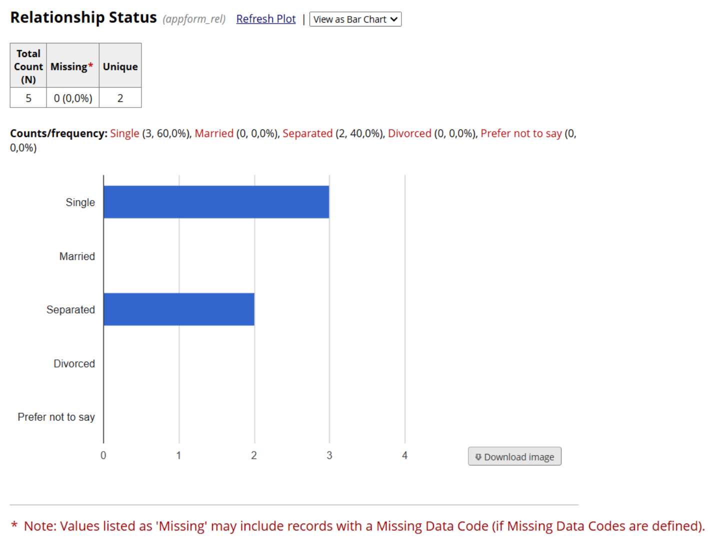
If you choose View Report, the system will take a few moments to render the report, and then it will be displayed in table format.

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			

If you choose to Export Data, you can make selections about your preferred format, de-identification options, and advanced data formatting.

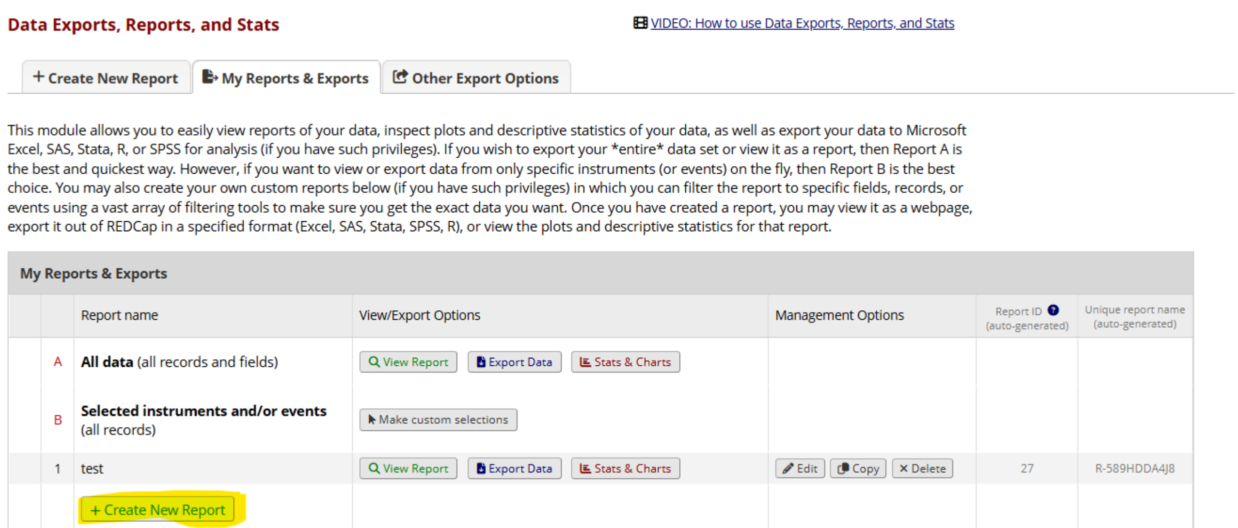


If you select Stats & Charts, you will see summary statistics tables and graphs on the data in the report you have selected. Later sections of this manual delve in more detail into the stats and charts function.

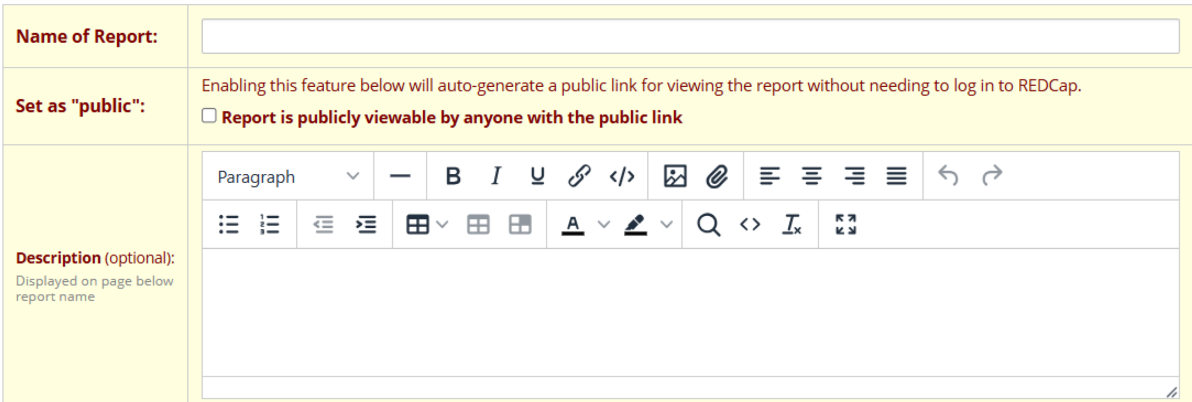


Creating a New Report

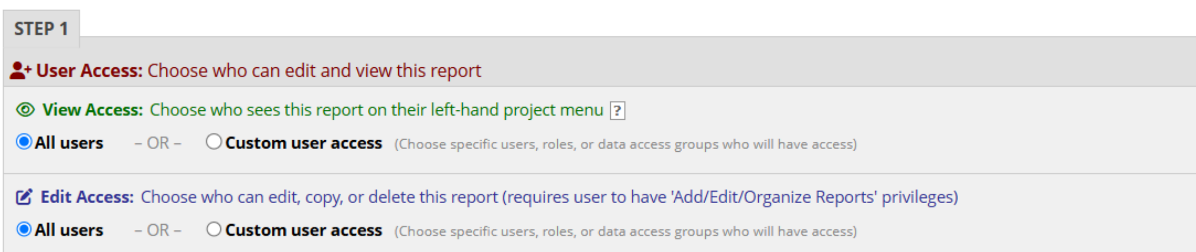
From the main Data Exports, Reports and Stats section, select "Create New Report," as shown below.



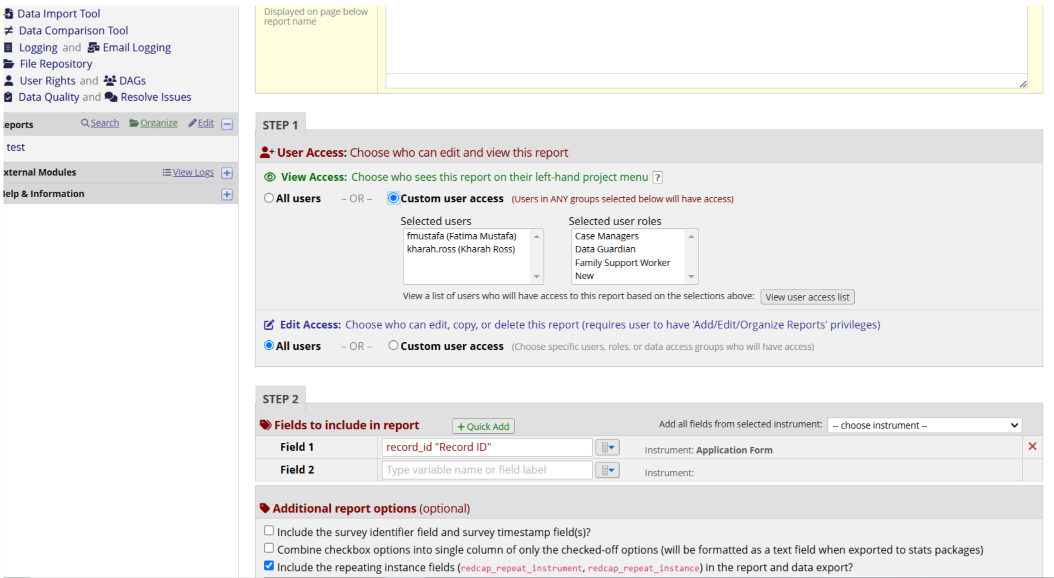
Set the report name and provide a description. You can select if the report is public (if you want to share it with users who do not have access to the REDCap system, for example) or private. To make the report public and generate a public link, you first have to set up the report, save it and then click on the checkbox next to “Report is publicly viewable by anyone with the public link.” This will generate a link to your report that can be shared with other people, such as members of your board.



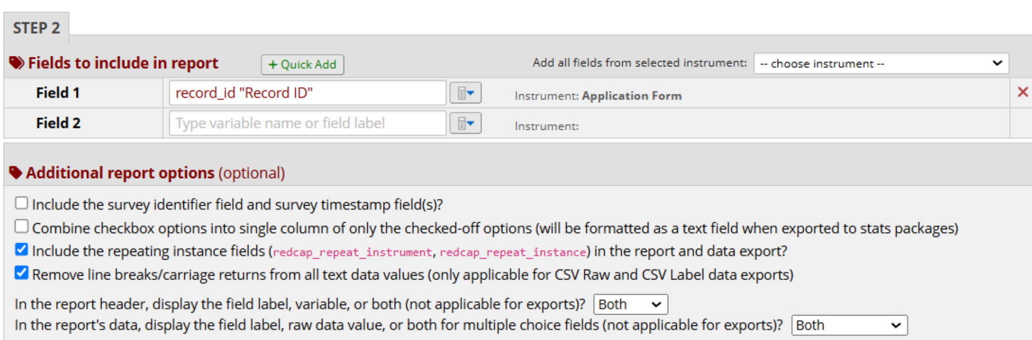
In Step 1, set user access to the report. You can either provide all users in your project with access to the report or only provide some users access.



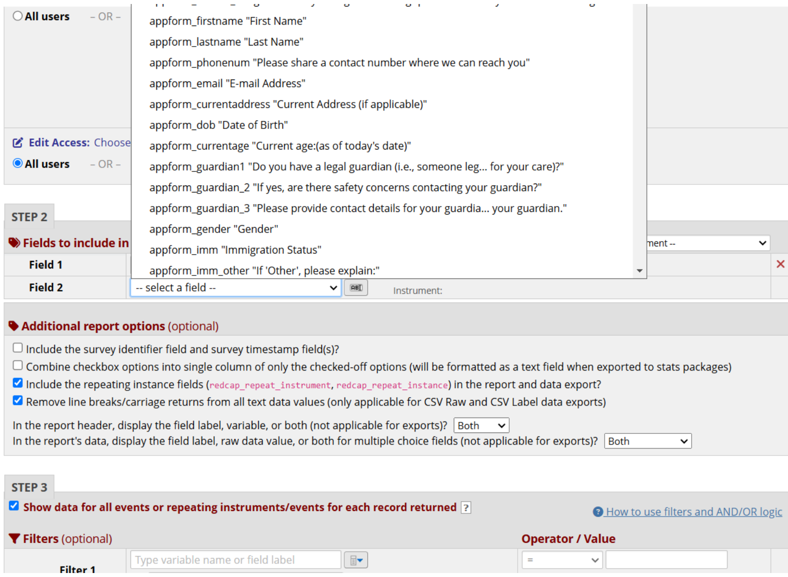
If you select “custom user access,” it will provide you with the option of limiting access to certain users in the system or limiting access by user roles. It is important to think carefully about the data that will be in the report and to limit access to the report if it contains identifying information 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.



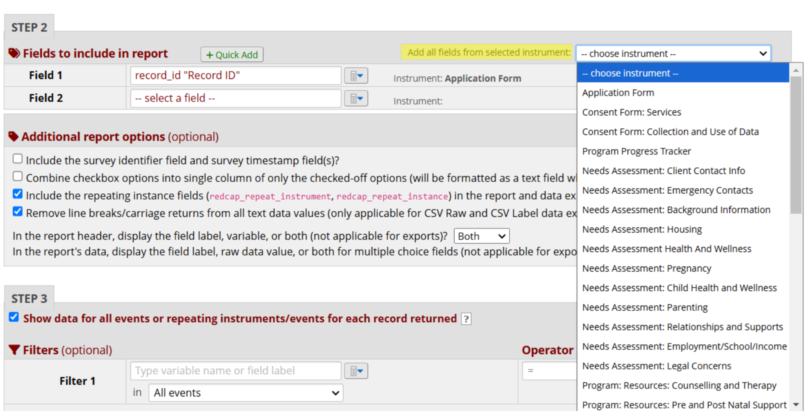
In Step 2, select the fields to include in your report. You can select fields across multiple forms, or multiple fields on the same form.



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:



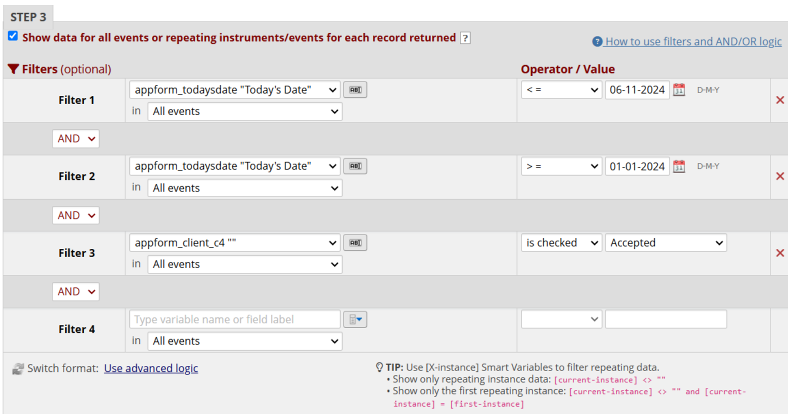
Finally, you can include all fields in a particular instrument by using the "Add all fields from selected instrument" option and then using the pull-down menu to pick the relevant instrument.



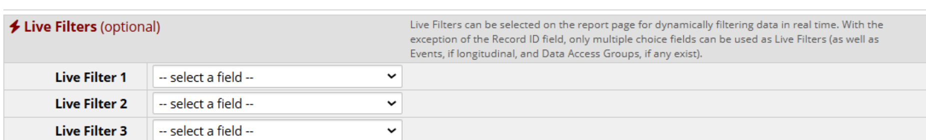
In Step 3, you can apply any filters you would like to your data. In REDCap, there are two types of filters for reports:

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.

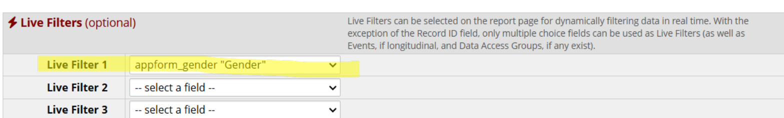
First, REDCap asks you to define the static filters that you will use to subset the data for your report. You can use operators to select data that is below or above a certain value, as in the example below. In the screenshot below, the data is filtered by date and includes all records from 1st January 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.



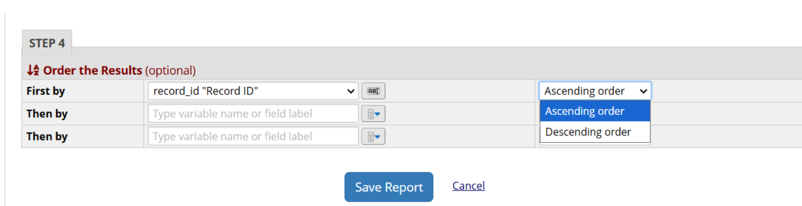
Once you select your static filters, you can also define live filters. These filters will appear at the top of your actual report, and you will be able to update these filters while you are viewing the report.



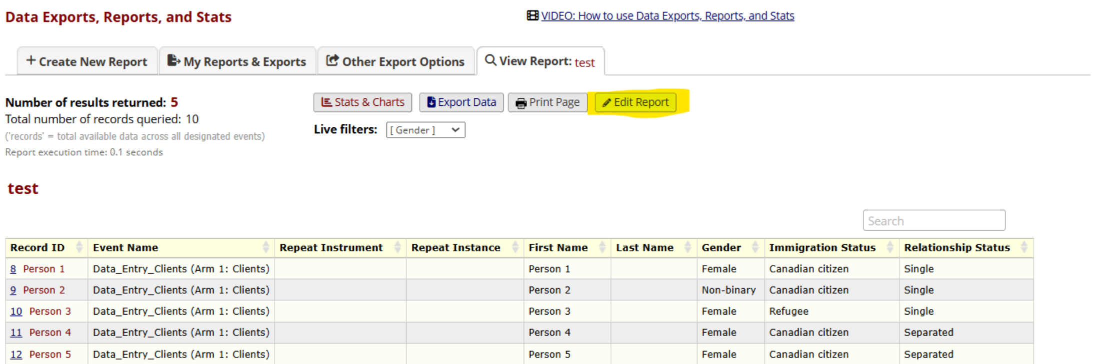
For example, you could set gender as your live filter so that when you are viewing your report, you can select different genders and see specific data for each gender. You can select multiple live filters for your report.



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.

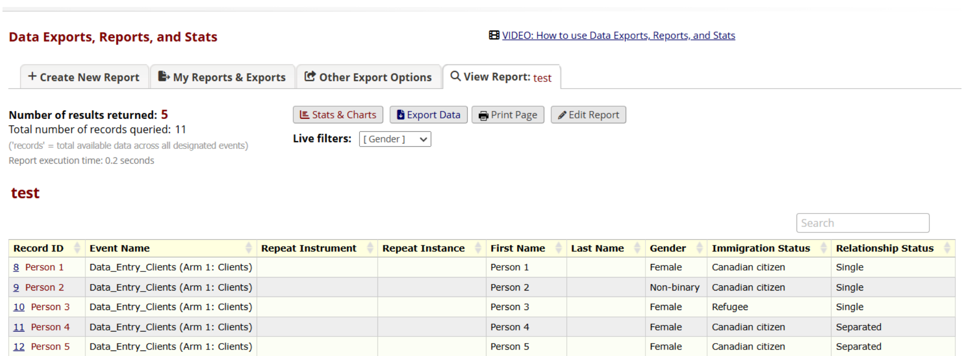


Once you have finished, click Save Report. Your report will load so you can see the outcome. You can always return to make changes to the parameters you set by clicking on “Edit Report” at the top of the page.



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.



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.