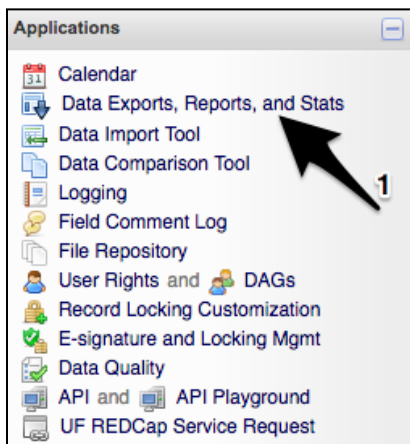


Creating a Customized Report in REDCap

Video: *How to use Data Exports, Reports, and Stats*

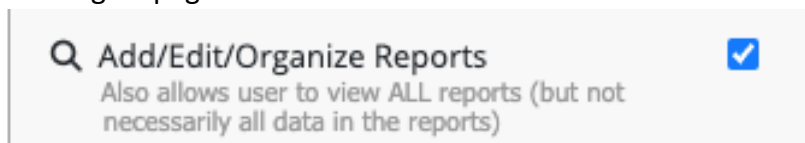
https://redcap.vanderbilt.edu/consortium/videoplayer.php?video=exports_reports01.mp4&title=How%20to%20use%20Data%20Exports,%20Reports,%20and%20Stats&referer=redcap.ctsi.ufl.edu

You may create a new report by selecting the fields/variables that you want to include in the report. You may add as many fields to your report as you wish, and you can choose which users may view this report. You will also need to provide a name for your report, which will then be displayed on the project's left-hand menu for anyone to whom you have given access. You can filter the results returned in the report in a variety of ways, including using complex AND/OR logic. When you are finished, click the *Save Report* button at the bottom. The new report will then be added to your list of reports, after which you may immediately begin viewing them or exporting them.



Note: if you do not see “Data Exports, Reports & Stats” listed under the Applications menu, that means you were not given user rights to create reports. You will need to contact someone on the study who has User Rights so they can add the user right below to your permissions:

User Rights page:



Step 2: Pick the fields you want to be displayed in the report.

STEP 2

Fields to include in report [Quick Add](#) choose instrument --

If you only need a few fields from a certain form(s), use this option

If you want to add every field from a certain form(s), use this option

these are the data fields that will be included in the report

Field	Field Label	Instrument	Action
Field 1	study_id "Study ID"	Demographics	[X]
Field 2	demo_first_name "First Name"	Demographics	[X]
Field 3	demo_last_name "Last Name"	Demographics	[X]
Field 4	demo_dob "Date of Birth"	Demographics	[X]
Field 5	demo_age "Age"	Demographics	[X]
Field 6	demo_gender "Gender "	Demographics	[X]
Field 7	demo_race "Race"	Demographics	[X]
Field 8	demo_ethno "Ethnicity"	Demographics	[X]
Field 9	pe_height "Height"	Physical Exam	[X]
Field 10	pe_weight "Weight"	Physical Exam	[X]
Field 11	pe_bmi "BMI"	Physical Exam	[X]
Field 12	pe_bp_sys "Blood Pressure - Systolic"	Physical Exam	[X]
Field 13	pe_bp_dias "Blood Pressure - Diastolic"	Physical Exam	[X]
Field 14	-- select a field --		[X]

Step 3 (Optional): Use filters to only see certain subjects' data or data at only one event (if longitudinal). For example, if you only want to see Female subjects with a completed *Demographics* form (see below).

STEP 3

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

Filters (optional)

Filter 1 demographics_complete "Complete?" in All events = Complete X

AND

Filter 2 demo_gender "Gender " in All events = Female X

AND

Filter 3 Type variable name or field label in All events =

Switch format: [Use advanced logic](#)

If you only want to see data from one event, highlight the event(s) you want to see:

Additional Filters (optional)
(Records belonging only to ALL selections below will appear in the report)

Filter by event(s):

Baseline
1 week FU
1 month FU
6 months

If your project is longitudinal, you can also filter data by event. For example, if you only want to see lab values at Baseline, click on Baseline.

Live filters (optional) allow you to dynamically filter data in real time in the actual report.

Live Filters (optional)
Live Filters can be selected on the report page for dynamically filtering data in real time. 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	demo_race "Race"		Just like Excel, if you want to be able to filter results on the View Report page, select which field(s) you want to filter.
Live Filter 2	demo_ethno "Ethnicity"		
Live Filter 3	demo_gender "Gender"		

Step 4 (optional): Order the results.

STEP 4

Order the Results (optional)

First by
demo_last_name "Last Name"

Then by
Type variable name or field label

Then by
Type variable name or field label

Ascending order
Ascending order
Ascending order

Normally the results will be ordered by Study ID. However, if you want the results ordered another way, you can select that here. In the example below, I am ordering the results by Last Name in ascending order.

Click on *Save Report* when you are finished. You should receive the popup below:

✓ Your report has been saved!

The report named "Accrual" has been successfully saved.

View report

Return to My Reports & Exports

Continue editing report

Click on *View Report* to see your results.

Number of results returned: **8**
Total number of records queried: 19
(records = total available data across all designated events)

Stats & Charts Export Report Print Page Edit Report

Live filters: [Race] [Ethnicity] [Gender]

Accrual

Study ID (study_id)	Event Name (redcap_event_name)	First Name (demo_first_name)	Last Name (demo_last_name)	Date of Birth (demo_dob)	Age (demo_age)	Gender (demo_gender)	Race (demo_race)	Ethnicity (demo_ethno)	Height (pe_height)	Weight (pe_weight)	BMI (pe_bmi)	Blood Pressure - Systolic (pe_bp_sys)	Blood Pressure - Diastolic (pe_bp_dias)
096	Baseline	Anna	Banana	1990-12-06	21.5	Female (0)	Native Hawaiian or Pacific Islander (3)	Non-Hispanic (2)	67	90	200.5	140	90
010	Baseline	June	Curry	1965-03-10	46.4	Female (0)	White (5)	Non-Hispanic (2)	175	80	26.1	98	75
019	Baseline	Jane	Eyre	1986-02-04	26.4	Female (0)	White (5)	Non-Hispanic (2)	78	90	147.9	140	90
002	Baseline	Kara	Goucher	1934-12-19	76.9	Female (0)	White (5)	Hispanic (1)	167	54	19.4	115	76
011	Baseline	Tammy	Morton	1960-06-01	51.2	Female (0)	Black or African American (4)	Non-Hispanic (2)	204.8	85.9	20.5	120	88
007	Baseline	Sarah	Norton	1960-08-01	50.9	Female (0)	Native Hawaiian or Pacific Islander (3)	Non-Hispanic (2)	170	80	27.7	95	72
004	Baseline	Kim	Smith	1944-02-27	67.4	Female (0)	Asian (2)	Hispanic (1)	154	49	20.7	125	80
0011	Baseline	Sally	Smith	1945-03-07	68.8	Female (0)	White (5)	Non-Hispanic (2)	120	45	31.3	120	90

Once the report has been created and saved, you can easily access it by clicking on the report's name under *Reports*.

Applications

- Calendar
- Data Exports, Reports, and Stats
- Data Import Tool
- Data Comparison Tool
- Logging
- Field Comment Log
- File Repository
- User Rights and DAGs
- Record Locking Customization
- E-signature and Locking Mgmt
- Data Quality
- API and API Playground
- UF REDCap Service Request

Project Bookmarks

- AutoNotify Plugin
- Custom Dashboard: Default Custom Dashboard

Reports Edit reports

1) **Accrual**

Additionally, you can go back to the *Data Exports, Report, and Stats* page and click on the report's name there.

My Reports & Exports

	Report name	View/Export Options	Management Options	Report ID (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	Accrual	View Report Export Data Stats & Charts	Edit Copy Delete	6827

+ Create New Report

Note: If your project is longitudinal, knowing which event or events the data in your report comes from will be very helpful, especially for filtering. For example, if *all of the data* in the report comes from the event called *Baseline*, it would be good to select the event *Baseline* in Step 3:

STEP 3

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

Filters (optional)

			Operator / Value	
Filter 1	demographics_complete "Complete?"	ABX	=	Complete
	in Baseline			
AND				
Filter 2	demo_gender "Gender "	ABX	=	Female
	in Baseline			

Example of the Create New Report page:

Data Exports, Reports, and Stats

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

[+ Create New Report](#)
[My Reports & Exports](#)
[Other Export Options](#)

You may create a new report by selecting the fields/variables below that you want to include in the report. You may add as many fields to your report as you wish, and you can choose which users may view this report. You will also need to provide a name for your report, which will then be displayed on the project's left-hand menu for anyone to whom you have given access. You can filter the results returned in the report in a variety of ways, including using complex AND/OR logic. When you are finished, click the Save Report button at the bottom. The new report will then be added to your list of reports, after which you may immediately begin viewing them or exporting them.

Name of Report:

STEP 1

User Access: Choose who sees this report on their left-hand project menu [?](#)

☒ All users
 — OR —
 ☐ Custom user access (Choose specific users, roles, or data access groups who will have access)

Select which users can view this report. If the report contains PHI, those users who cannot see PHI should not be given access to this report.

STEP 2

Fields to include in report [+ Quick Add](#) Add all fields from selected instrument:

Field 1	study_id 'Study ID'	BBB	Instrument: Demographics	X
Field 2	Type variable name or field label	BBB		

To hand select certain fields, use this option

To select an entire form's data, use this option

STEP 3

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

Filters (optional)

Filter	Operator / Value
Filter 1	Type variable name or field label BBB =
	in All events

Switch format: [Use advanced logic](#)

To filter the data, enter the filters here. For example, gender = female will only show female subjects in the report.

Additional Filters (optional) (Records belonging only to ALL selections below will appear in the report)

Filter by event(s):

Baseline	X
1 week FU	
1 month FU	
6 months	

If the project is longitudinal, you can filter by the event as well. For example, if you only want to see labs from Baseline, click on Baseline.

Live Filters (optional) Live Filters can be selected on the report page for dynamically filtering data in real time. 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 --	If you want to be able to filter the report itself (similar to Excel), select which fields you want to be able to filter on. Note: only multiple choice fields can be used.
Live Filter 2	-- select a field --	
Live Filter 3	-- select a field --	

STEP 4

Order the Results (optional)

First by	study_id 'Study ID'
Then by	Type variable name or field label
Then by	Type variable name or field label

Normally REDCap will order the results by Study ID. If you want to order them another way, such as by last name, you can change this to the last name field in your project.

Click Save Report when finished