Main FEATURES AND FUNCTIONALITY

- Reports can be viewed online, exported, or shown as stats and charts
- Drag-n-drop re-ordering of report variable fields
- Customized user access of reports
- Run report on all data or selected instruments
- Choice of export format
- Advanced logic (and, or) and filtering (=, not=, <, <=, >, >=, contains)
- Additional filtering by event and Data Access Group (DAG)
- De-identified export with “Remove all tagged identifier fields”
Click on “Reports, Exports, and Stats” link under Applications. Watch the VIDEO to familiarize yourself with this module.

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.
CREATE NEW REPORT TAB

“Study ID” is default first field in a new report.

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.

**STEP 1**

**User Access:** Choose who can view this report

- All users
- Custom user access (Choose specific users, roles, or data access groups who will have access)

**STEP 2**

**Fields to include in report**

<table>
<thead>
<tr>
<th>Field 1</th>
<th>record_id &quot;Study ID&quot;</th>
<th>Add all fields from selected instrument:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Field 2</td>
<td>Type variable name or field label</td>
<td>-- choose instrument --</td>
</tr>
</tbody>
</table>

Instrument: Basic Demography Form
CREATE NEW REPORT TAB

Select all users or custom access.

**User Access:** Choose who can view this report

- **All users**
- **Custom user access** (Choose specific users, roles, or data access groups who will have access)

**Selected users:**
- harrispa (Paul Harris)
- minorbl (Brenda Minor)
- site_admin (Joe User)

**Selected user roles:**
- Data Entry Person
- PI
- Project Coordinator

**Selected DAGs:**
- Duke
- Harvard
- Vanderbilt

To select multiple items in the list(s), hold Ctrl/Command while clicking the items.

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

<table>
<thead>
<tr>
<th>User</th>
<th>Role</th>
<th>Data Access Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>harrispa (Paul Harris)</td>
<td></td>
<td>Vanderbilt</td>
</tr>
<tr>
<td>minorbl (Brenda Minor)</td>
<td>Data Entry Person</td>
<td></td>
</tr>
<tr>
<td>site_admin (Joe User)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
CREATE NEW REPORT TAB

Select fields.

- record_id "Study ID"
- first_name "First Name"
- last_name "Last Name"
- address "Street, City, State, ZIP"
- telephone "Phone number"
- email "E-mail"
- dob "Date of birth"
- age "Age (years)"
- ethnicity "Ethnicity"
- race "Race"
- sex "Gender"
- height "Height (cm)"
- weight "Weight (kilograms)"
- bmi "BMI"
- comments "Comments"
- demographics_complete "Complete?"
- survey_complete "Complete?"
CREATE NEW REPORT TAB

Select instrument.

Additional fields to include in report.
CREATE NEW REPORT TAB

Use filters and advanced logic.

Filters (optional)

1. Filter 1: Sex "Gender"
   - Operator: =
   - Value: Male

2. Filter 2: age "Age (years)"
   - Operator: >=
   - Value: 30

3. Filter 3: age "Age (years)"
   - Operator: <=
   - Value: 50

4. Filter 4: Type variable name or field label
   - Switch format: Use advanced logic
Choice of advanced logic cannot be reversed.

(*If you go back to original format, you lose your filters.*)
CREATE NEW REPORT TAB

View of advanced logic (similar to branching logic advanced logic).

Filter by event (for longitudinal studies).
Three sort options.

**Order the Results (optional)**

<table>
<thead>
<tr>
<th>First by</th>
<th>record_id &quot;Study ID&quot;</th>
<th>Ascending order</th>
</tr>
</thead>
<tbody>
<tr>
<td>Then by</td>
<td>Type variable name or field label</td>
<td>Ascending order</td>
</tr>
<tr>
<td>Then by</td>
<td>Type variable name or field label</td>
<td>Ascending order</td>
</tr>
</tbody>
</table>
This tab will allow you to run full or partial data exports, create reports and export those reports. A Stats & Charts view is also available.

### Data Exports, Reports, and Stats

- **Create New Report**
- **My Reports & Exports**
- **Additional 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 times, 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

<table>
<thead>
<tr>
<th>Report Name</th>
<th>View/Export Options</th>
<th>Management Options</th>
<th>Report ID (Auto-generated)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>A</strong> All data (all records and fields)</td>
<td>View Report</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>B</strong> Selected instruments and/or events (all records)</td>
<td>Make custom selections</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Additional options:**
- **Create New Report**
My REPORTs & Exports TAB

All data or selected instruments.

Data Exports, Reports, and Stats

Create New Report  My Reports & Exports  Additional 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

<table>
<thead>
<tr>
<th>Report name</th>
<th>View/Export Options</th>
<th>Management Options</th>
<th>Report ID (auto-generated)</th>
</tr>
</thead>
<tbody>
<tr>
<td>All data (all records and fields)</td>
<td><img src="image" alt="View Report" /> <img src="image" alt="Export Data" /> <img src="image" alt="Stats &amp; Charts" /></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Selected instruments and/or events (all records)</td>
<td><img src="image" alt="Make custom selections" /></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Create New Report
Select instrument to export.
Select export format and optional de-identification options.

- **Choose export format**:
  - CSV / Microsoft Excel (raw data)
  - CSV / Microsoft Excel (labels)
  - SPSS Statistical Software
  - SAS Statistical Software
  - R Statistical Software
  - STATA Statistical Software

- **De-identification options (optional)**:
  - Remove all tapped identifier fields (tagged in Data Dictionary)
  - Hash the Record ID field (converts record name to an unrecognizable value)
  - Remove unvalidated Text fields (i.e., Text fields other than dates, numbers, etc.)
  - Remove Notes/Essay box fields
  - Remove all date and date-time fields
  - Shift all dates by a value between 0 and 364 days (shifted amount determined by algorithm for each record)

**Additional export options**:
- Export Data Access Group name for each record (if record is in a group)
Results are paged by 100 records (just like the dashboard).

<table>
<thead>
<tr>
<th>#</th>
<th>Study ID</th>
<th>Data Access Group</th>
<th>Age (years)</th>
<th>Gender</th>
<th>Race</th>
<th>Death at any time up to NDI (death)</th>
<th>Days from Study Entry to Discharge (dlos)</th>
<th>Days of Follow-Up (d_time)</th>
<th>DZ Group (dzgroup)</th>
<th>DZ Class (dzclass)</th>
<th>Number of Comorbidities</th>
<th>Years of Education (edu)</th>
<th>Income (income)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>62.84998</td>
<td>Male</td>
<td>Other</td>
<td>No</td>
<td>No</td>
<td>5</td>
<td>2029</td>
<td>8</td>
<td>Colon Cancer (5)</td>
<td>Cancer (3)</td>
<td>0</td>
<td>11</td>
<td>25-50k</td>
</tr>
<tr>
<td>2</td>
<td>42.25897</td>
<td>Female</td>
<td>Hispanic</td>
<td>Yes</td>
<td>No</td>
<td>8</td>
<td>370</td>
<td>4</td>
<td>Lung Cancer (6)</td>
<td>Cancer (3)</td>
<td>0</td>
<td>11</td>
<td>11-25k</td>
</tr>
</tbody>
</table>
Set this User Right for any users that should only have export access to fields not marked at identifier fields.
If user has no access to form, but report pulls fields from that form, results will be greyed out.
View all data in “Stats & Charts” view.

Number of results returned: 255
Total number of records queried: 255

All data (all records and fields)

<table>
<thead>
<tr>
<th>DISPLAY OPTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select a data collection instrument to view</td>
</tr>
<tr>
<td>Demographics</td>
</tr>
</tbody>
</table>

Optional: Select a record to overlay onto the plots below
-- select record --

Viewing options:
- Show plots & stats
- Show plots only
- Show stats only

Age (years)

<table>
<thead>
<tr>
<th>Total Count</th>
<th>Missing</th>
<th>Unique</th>
<th>Min</th>
<th>Max</th>
<th>Mean</th>
<th>StdDev</th>
<th>Sum</th>
<th>Percentile</th>
</tr>
</thead>
<tbody>
<tr>
<td>255</td>
<td>0.00%</td>
<td>253</td>
<td>18.12</td>
<td>84.55</td>
<td>58.77</td>
<td>17.55</td>
<td>14,885.29</td>
<td>0.05</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Highest values: 91.25299, 91.43696, 91.81899, 92.64294, 94.55194

Graph showing data distribution.
View selective data in “Stats & Charts” view.

- Number of results returned: 31
  Total number of records queried: 255

### Males age 30-50

**DISPLAY OPTIONS**
Optional: Select a record to overlay onto the plots below

**Viewing options:** Show plots & stats | Show plots only | Show stats only

<table>
<thead>
<tr>
<th>Age (years)</th>
<th>Refresh Plot</th>
</tr>
</thead>
</table>

#### Age (years)

<table>
<thead>
<tr>
<th>Total Count</th>
<th>Missing</th>
<th>Unique</th>
<th>Min</th>
<th>Max</th>
<th>Mean</th>
<th>StdDev</th>
<th>Sum</th>
<th>Percentile 0.05</th>
<th>Percentile 0.10</th>
<th>Percentile 0.25</th>
<th>Percentile 0.50</th>
<th>Percentile 0.75</th>
<th>Percentile 0.90</th>
<th>Percentile 0.95</th>
</tr>
</thead>
<tbody>
<tr>
<td>31</td>
<td>0 (0.0%)</td>
<td>31</td>
<td>30.54</td>
<td>49.17</td>
<td>41.79</td>
<td>5.17</td>
<td>1,295.52</td>
<td>31.73</td>
<td>33.51</td>
<td>39.63</td>
<td>41.99</td>
<td>45.94</td>
<td>47.94</td>
<td>48.45</td>
</tr>
</tbody>
</table>

- Lowest values: 39.53799, 31.20299, 32.25699, 33.50699, 34.47198
- Highest values: 47.30499, 47.94499, 48.07397, 48.81897, 49.15898
ADDITIONAL export options

ZIP of all uploaded files or single PDF of all records.

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**ZIP file of uploaded files (all records)**

Uploaded files for all records in this project may be downloaded in a single ZIP file. This file contains any files uploaded for 'File Upload' fields/questions on a survey or data entry form. The ZIP file will contain a folder of all the files organized by record name and variable/field name and also contains an index.html file that serves as a table of contents for all the files. After downloading the ZIP file, extract all the files/folders to a directory on your local computer, after which you may double-click the index.html file inside to view a listing of the files using your web browser, or you may view the files directly by looking in the 'documents' folder. Click the icon to the right to begin downloading the ZIP file.

*Note: If your project has a large amount of 'File Upload' fields/questions or records/responses, the resulting ZIP file may be very large in file size. Please be patient if the file takes time to download.*

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**PDF of data collection instruments containing saved data (all records)**

The data for all records in this project may be downloaded in a single PDF file. This file contains the actual page format as you would see it on the data entry page or survey and includes all data for all records for all data collection instruments. Click the icon to the right to begin downloading the file.

*Note: If your project has a large amount of fields/questions or records/responses, the resulting PDF file may be very large both in file size and in page length. Please be patient if the file takes time to download.*
All exports are stored in File Repository.
FOR FURTHER help

- [website](https://cb2.uahs.arizona.edu/services-tools/surveys-clinical-databases-redcap)
- dionisiasaner@email.arizona.edu