

REDCap – Creating a report

The Report Builder allows a user to create customized reports that are queried in real time.

How to create a report:

- Click on the “Data Exports, Reports, and Stats” hyperlink located on the left navigation bar.
- Click on “Create New Report.”
 - Enter a Name for the Report.
 - User Access:
 - All Users refers to all users that have access to the project.
 - Custom User Access allows a user to restrict viewing access to certain users.
 - Note: If a particular report’s access is restricted **from** a user who has ‘Add/Edit Reports’ rights on the User Rights section, then that user will still be able to view and edit the 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)

- Fields to include: Select the fields to be included in the report. There are three (3) ways to add fields to the report:
 - Quick Add is a checklist format of all the fields/variables within the project. A user can check the boxes for the variables individually.
 - Add all fields from the selected instrument is a quick way to add **all** the fields/variables from a particular form.
 - Dropdown list: click on the blue arrow, then the field to the left becomes a dropdown list of all the variables within the project.
 - Surveys: if you would like the survey identifier (if used) and survey timestamp fields included in the report, then click the checkbox.

In this example, we want to see the following fields on the report:

Study ID, Name, Date of Birth, Gender, Pregnant, and Candy

STEP 2

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

Field 1	study_id "Study ID"	Instrument: Demographics	✘
Field 2	name "Name"	Instrument: Demographics	✘
Field 3	dob "Date of Birth"	Instrument: Demographics	✘
Field 4	gender "Gender"	Instrument: Demographics	✘
Field 5	preg "Pregnant?"	Instrument: Demographics	✘
Field 6	candy "What is your favorite type of candy?"	Instrument: Test 3	✘
Field 7	Type variable name or field label		

Additional fields to include in report (optional)

Include the survey identifier field and survey timestamp field(s)?

- Filters (optional): This section allows a user to filter the report for certain information.
 - Example: We only want individuals born on 8/22/2016 and 8/23/2016.

Filters:

STEP 3

[How to use filters and AND/OR logic](#)

Filters (optional) **Operator / Value**

Filter 1	dob "Date of Birth"	=	08-22-2016	M-D-Y	✘	
OR	Filter 2	dob "Date of Birth"	=	08-23-2016	M-D-Y	✘
AND						
Filter 3	-- select a field --					

Switch format: [Use advanced logic](#)

Results:

Demographics

Study ID (study_id)	Name (name)	Date of Birth (dob)	Gender (gender)	Pregnant? (preg)	What is your favorite type of candy? (candy)
5	5	08-23-2016	Male (1)		Hershey's Kisses (3)
2 Johnson, Joe	Johnson, Joe	08-22-2016	Male (1)		Snickers (1)
4 test	test	08-22-2016	Male (1)		M&Ms (5)
7 Test	Test	08-23-2016	Female (2)	No (0)	
5 test 2	test 2	08-22-2016	Female (2)	No (0)	Three Musketeers (2)
8 Test Form	Test Form	08-23-2016	Male (1)		Three Musketeers (2)
3 Test Test	Test Test	08-22-2016	Female (2)	No (0)	
6 Testing	Testing	08-23-2016	Female (2)	No (0)	

- Live Filters (optional): Live filters can be used on the report page for filtering data in real time. Only multiple choice fields can be used with these filters. Up to three (3) live filters can be assigned.
 - In this example, we have assigned 'Gender' and 'What is your favorite candy?'

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	gender "Gender" ▼
Live Filter 2	candy "What is your favorite type of candy?" ▼
Live Filter 3	-- select a field -- ▼

- Order the Results (optional): The results will automatically order by Record ID unless indicated otherwise.
 - In this example, we selected the order by 'Name'

STEP 4

Order the Results (optional)

First by	name "Name" ▼ [AB] []	Ascending order ▼
Then by	Type variable name or field label []	Ascending order ▼
Then by	Type variable name or field label []	Ascending order ▼

- Click on 'Save' for the report.
- Based on the examples in this guide, here is the report.

Number of results returned: **8**
Total number of records queried: 11

[Stats & Charts](#)
[Export Report](#)
[Print Page](#)
[Edit Report](#)

Live filters: [Gender] ▼ [What is your favorite type of candy?] ▼

Demographics

Study ID (study_id)	Name (name)	Date of Birth (dob)	Gender (gender)	Pregnant? (preg)	What is your favorite type of candy? (candy)
5	5	08-23-2016	Male (1)		Hershey's Kisses (3)
2 Johnson, Joe	Johnson, Joe	08-22-2016	Male (1)		Snickers (1)
4 test	test	08-22-2016	Male (1)		M&Ms (5)
7 Test	Test	08-23-2016	Female (2)	No (0)	
5 test 2	test 2	08-22-2016	Female (2)	No (0)	Three Musketeers (2)
8 Test Form	Test Form	08-23-2016	Male (1)		Three Musketeers (2)
3 Test Test	Test Test	08-22-2016	Female (2)	No (0)	
6 Testing	Testing	08-23-2016	Female (2)	No (0)	

- The live filters allow a user to further filter the report results. For example, of the results, we only want to see individuals who like Three Musketeers.

Number of results returned: 2
Total number of records queried: 11

[Stats & Charts](#) [Export Report](#) [Print Page](#) [Edit Report](#)

Live filters: [Gender] [Three Musketeers](#) [Reset](#)

Demographics

Study ID (study_id)	Name (name)	Date of Birth (dob)	Gender (gender)	Pregnant? (preg)	What is your favorite type of candy? (candy)
5 test 2	test 2	08-22-2016	Female (2)	No (0)	Three Musketeers (2)
8 Test Form	Test Form	08-23-2016	Male (1)		Three Musketeers (2)