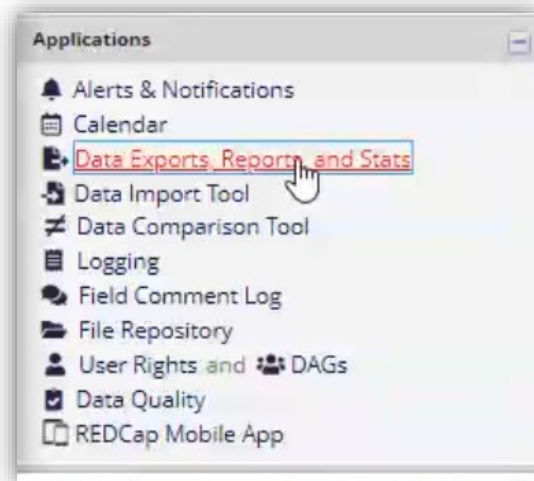This guide covers how to view & export data from an existing instrument (survey or form)

*See our other guides for support on
building & distributing instruments*

To begin, go to 'Data Exports, Reports, and Stats' in the left column

There are multiple ways to view your data.

We'll begin with the 'View Report' button

Record ID record_id	Survey Identifier redcap_survey_identifier	First Name first_name	Last Name last_name	Email email	Complete? respondent_list_complete	Survey Timestamp survey_title_timestamp	What is your favorite color? favorite_color	Why is the above your favorite color? why_favorite_color	What is your second favorite color? nd_favorite	Select your 3 favorite colors				Complete? survey_title_complete	Complet survey_2_complete
										Yellow favorite_colors___1	Orange favorite_colors___2	green favorite_colors___3	Blue favorite_colors___4		
1		Emily	Traw	emily.traw@northwestern.edu	Incomplete (0)	10-18-2021 11:41	red	it's pretty	Blue (2)	Checked (1)	Checked (1)	Checked (1)	Unchecked (0)	Complete (2)	Incomple (0)
2		Jack	Johnson	jj@gmail.com	Complete (2)					Unchecked (0)	Unchecked (0)	Unchecked (0)	Unchecked (0)	Incomplete (0)	Incomple (0)
3		CJ	Denison	cj@email.com	Incomplete (0)					Unchecked (0)	Unchecked (0)	Unchecked (0)	Unchecked (0)	Incomplete (0)	Incomple (0)
4		test emily	test traw	emily.traw@northwestern.edu	Complete (2)					Unchecked (0)	Unchecked (0)	Unchecked (0)	Unchecked (0)	Incomplete (0)	Incomple (0)
5		test emily	test traw	emily.traw@northwestern.edu	Complete (2)	10-27-2021 16:19	test	test	Blue (2)	Checked (1)	Checked (1)	Checked (1)	Unchecked (0)	Complete (2)	Incomple (0)

The 'View Report' option shows all the data in your project. This is helpful to check test entries prior to distributing the survey(s) to your recipients.

Note: Multiple select checkbox options appear as indicated under the "Select your 3 favorite colors" columns. These populate as 1's and 0's as opposed to a list of selection options. This format allows for effective analysis when exported to excel or another statistical program. We will review an option to view this as a list later in the guide.

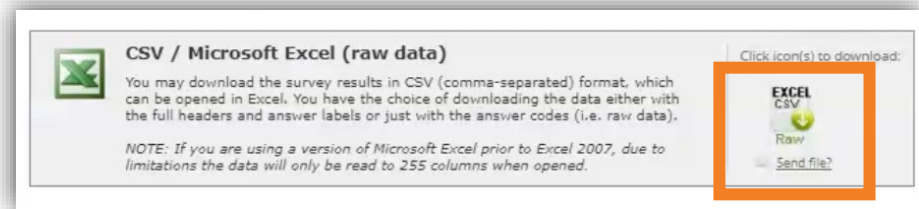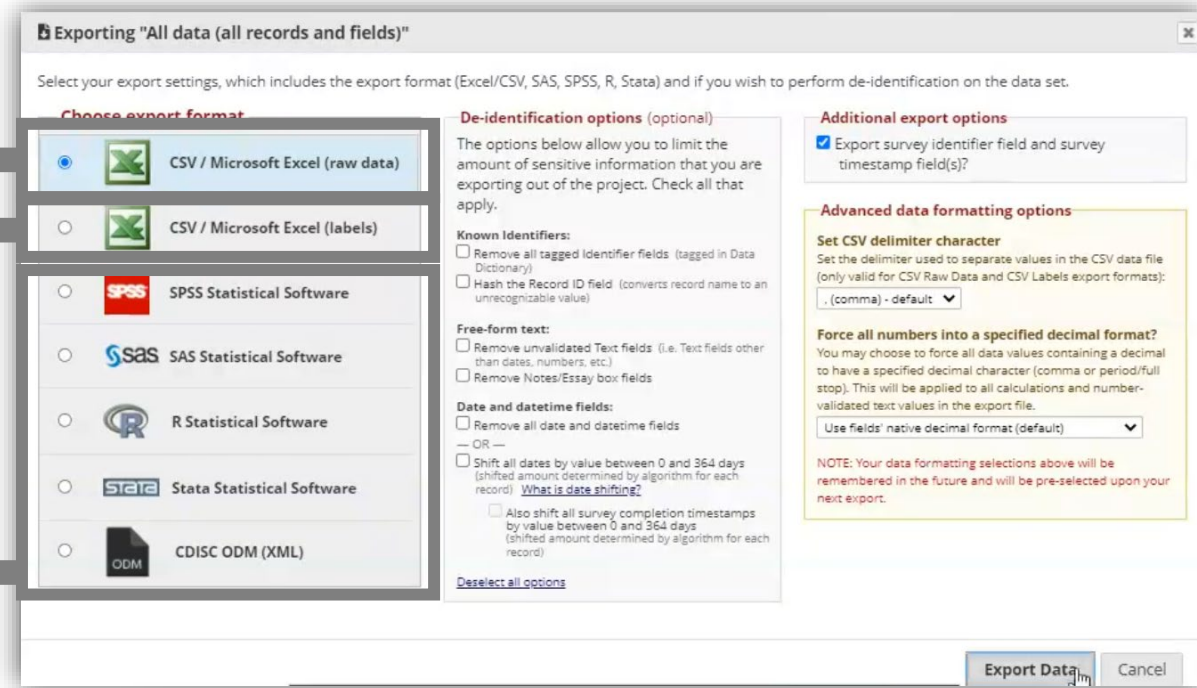**There are multiple ways to view your data.**

Next, we'll look at the 'Export Data' option.

The raw data Excel option is most appropriate for statistical analysis. Data will appear like the overview screen whereas multiple selection options are coded as a 1 (selected) or 0 (not selected)

The labeled Excel option is best for general review/analysis like program feedback surveys, information capture forms, etc

The other options export to either a format supported by specific statistical platform or XML code. If you are working with a statistician, they will likely request you export to one of these options.

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 tagged 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

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

CSV / Microsoft Excel (raw data)

You may download the survey results in CSV (comma-separated) format, which can be opened in Excel. You have the choice of downloading the data either with the full headers and answer labels or just with the answer codes (i.e. raw data).

NOTE: If you are using a version of Microsoft Excel prior to Excel 2007, due to limitations the data will only be read to 255 columns when opened.

Click icon(s) to download:
EXCEL CSV
Raw
Send file?

After you select your format, click 'Export Data' in the lower corner.
On the next screen, click the respective icon to download

There are multiple ways to view your data.

Next, we'll create a report to export specified data.

First you'll want to name & describe your custom report

If you have other REDCap users added to your project (these are usually other staff/faculty on your team), you can grant them access to view the report. <u>Note:</u> If they are not an authorized REDCap added to your project, they will not appear here.

Next, select which instrument you want to include variables from. In other words, select the survey/form you want to pull data from.

All the instruments from that survey will populate. You can remove fields you don't want using the red crosses on the right. If you want to select variables from multiple instruments, go back to the drop-down menu and select the next instrument you want to pull from. Those variables will populate under your existing variables.

OR

In addition to the method above, you can also select variables from your project directly into the next open field by typing or clicking the blue-arrow icon then selecting. Variables will auto-populate as you begin typing.

If you have a survey question/variable with multiple selection checkboxes, you can have REDCap format them as a text field instead of the raw data (presented as 1's and 0's). Select the 'Combine checkbox options' box under 'Additional report options'. This is suggested for general program evaluations and simple analyses. For statistical exports, we suggest leaving this unchecked.
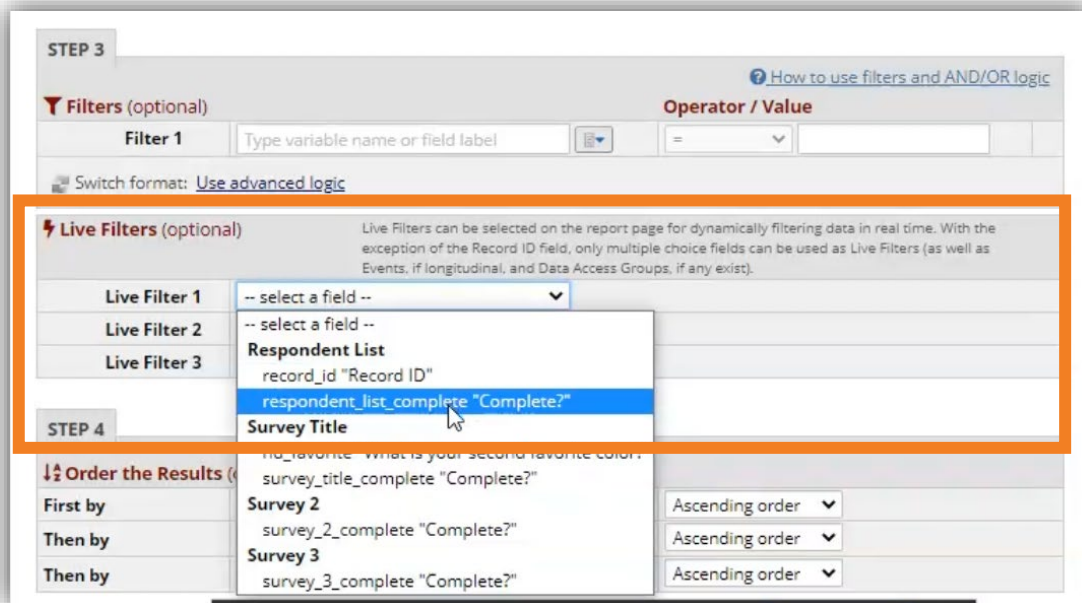
REDCap also allows you to add Live Filters to your report. Live Filters allow you to quickly toggle between two or more categories in a given data-set. In this example, we'll add a Live Filter to differentiate between complete and incomplete entries on our respondent list.

Under the desired variable ('Respondent List' in this case), select "Complete?". After entering your Live Filter(s), click the blue "Save Report" button at the bottom of the screen.

On the pop-up, select "view report"

Your Live Filter will appear above the data-set. You can add multiple filters for a given report.

If you want to filter which data populate the report (as opposed to a Live Filter which sorts/screens the data), select the **standard filter option** in the settings. This will create a report that only meets the criteria you select.

Two Reminders:

- You can edit a report at any point to add more Live Filters, edit standard filters, change viewing settings, etc. Changing the report does not change the data – only how you view the data.

- Data export tools work for both surveys (that are sent out to external users) and forms if you're using REDCap for data capture purposes (like a research study)

See our other guides to learn more foundational REDCap and Data Management skills

Northwestern University
NUCATS
Clinical and Translational Sciences Institute