REDCap@Yale
Research Electronic Data Capture

Frequently Asked Question (FAQ) Library

What is a custom dashboard? How do I create one?

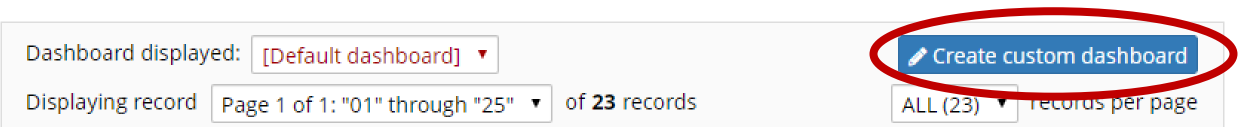
Each REDCap project has a default dashboard that displays the existing records and the status of every data collection instrument (i.e. form).

You can also build a custom dashboard which permits many configuration options. You can restrict the number of forms; filter the records displayed (e.g. *[age] > 30 and [diabetes] = "1"*); and sort the records by a field value. There are format controls as well, such as being able to display dashboard headers vertically, which will transpose them 90 degrees for a compact display.

Only users with ***Project Setup/Design*** privileges may create dashboards; however, once a custom dashboard has been created, all users in the project can view and use the dashboard.

<u>To create a custom dashboard:</u>

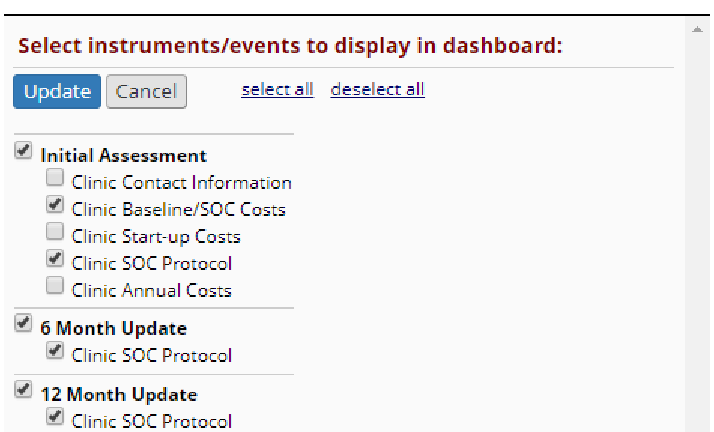
1. Navigate to the Record Status Dashboard in a project and click the '**Create Custom Dashboard'** button near the top of the page.



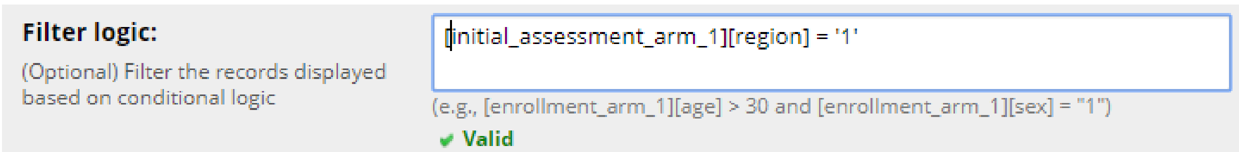
2. Enter the Dashboard title and description. To restrict the dashboard to specific forms/events, click on the pencil icon in the "**Select instruments/events**" option.

   a. Select or deselect forms/events from your project.

   <u>Example:</u>



3. To filter the records displayed, create conditional logic as you might do for branching. If you have multiple events in your project, remember to designate the event.



4. In the '**Sort by**' option, you have the option to sort and display records by a field other than Study ID.

5. Once you have finished selecting your parameters, click the **'Save Dashboard'** button. You will receive a notification that your dashboard was successfully saved.

6. To open a dashboard (default or customized), select it from the list of dashboards found in the dropdown field at the top of the screen.