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*
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.

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. **Note:** 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.
• 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)

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