

REDCap's Custom Record Status Dashboard Plugin – Users Guide

This guide describes the configuration of the Custom Record Status Dashboard plugin. This tool provides a way to customize the view and behavior of the Record Status Dashboard within REDCap. You can create several customized dashboards to fit your project's needs. The custom dashboard does not replace the traditional Record Status Dashboard that shows all records and events.


A custom record status dashboard allows you to build separate record status views to support various workflows in your project. With this feature, you can exclude certain forms and/or events to make it easier to read and faster to render - either by using the configuration panel ("Customize Dashboard") or by clicking on the red X in the right-hand corner when hovering over the column headers. You can also add record-level filters to omit those records you are not concerned with. For example, you could exclude those records from the Record Status Dashboard that have been excluded from the study or have been marked as Complete. The filtering functions the same way as using branching logic (i.e., [excluded] = '1' or [gender] = '2') or the filtering feature when creating Reports. Lastly, there are a number of visualization enhancements, such as row grouping and vertical alignment, that make the table easier to read. Users with project-design rights can save custom dashboards as bookmarks that can be used by other users on the project.

This plugin has been added to the UF CTSI's REDCap system and is available for your use. Using this plugin is a multi-step process requiring the REDCap form designer to add a project bookmark and testing to verify the rules in the filtering were composed correctly.

Follow the steps below to setup the plugin for your project and verify it is working.

Add the Custom Record Status Dashboard Bookmark to your Project

- 1) From the Project Setup page, click on **Add or edit bookmarks**.



Optional

I'm done!

Set up project bookmarks (optional)

You may create custom bookmarks to webpages that exist inside or outside of REDCap. These bookmarks will be seen as links on the left-hand project menu and can be accessed at any time by users who are given privileges to do so. Every project bookmark has custom settings that allow one to control its appearance and behavior.

Go to [Add or edit bookmarks](#)

- 2) Give the Bookmark a name like “Custom Record Status Dashboard” under **Link Label** and paste the following URL into **Link URL/Destination**: <https://redcap.ctsi.ufl.edu/redcap/plugins/redcap-custom-dashboard>

The screenshot shows the 'Add Link' form in REDCap. Callouts point to the following fields:

- Link Label:** "Name of the dashboard that will appear under Project Bookmarks"
- Link URL / Destination:** "<https://redcap.ctsi.ufl.edu/redcap/plugins/redcap-custom-dashboard>"
- User Access:** "This determines which project users can access this dashboard." (The 'All users' radio button is selected.)
- Append project ID to URL:** "Be sure to check this box" (The checkbox is checked.)
- Add button:** "Click on Add when finished"

- 3) Make sure to check the box to **Append project ID to URL**.
4) Click on **Add**.

The result should look like this:

The screenshot shows the 'Project Bookmarks' section in REDCap. A table lists the created bookmark:

Link #	Link Label	Link URL / Destination	Link Type	User Access	Opens new window	Append record info to URL	Append project ID to URL	Delete
1	Custom Record Status Dashboard	https://redcapstage.ctsi.ufl.edu/redcap/plugins/redcap-custom-dashboard	Simple Link	All users	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Add	Enter the label for the link as it is seen on the left-hand menu	Simple Link	All users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

A red arrow points from the text "Your new project bookmark" to the 'Custom Record Status Dashboard' entry in the Project Bookmarks list on the left.

To use/edit the Custom Record Status Dashboard, click on the bookmark name under **Project Bookmarks**.

Customizing your Record Status Dashboard

- 1) Click on **Customize Dashboard**

Custom Record Status Dashboard

Click on **Customize Dashboard** to do record-level filtering

Default Custom Dashboard

A custom dashboard allows you to build separate record status views to support various workflows in your project. You can exclude certain forms and events to make it easier to read and faster to render - either by using the config panel or by clicking on the column headers. You can also add record-level filters to omit those records you are not concerned with. Lastly, there are a number of visualization enhancements such as row grouping and vertical alignment that make the table easier to read. Users with project-design rights can save custom dashboards as bookmarks to be used by other users in the project.

Showing 18 of 18 records

Displaying Page 1 of 1: "001" through "98"... with 25 records per page

Study ID	Demographics	Physical Exam	Labs	GDS	GCSI	PHQ 9	Concomitant Medications	Adverse Events
001	Complete	Complete	Complete	Complete	Complete	Complete	Unverified	Complete
002	Complete	Complete	Complete	Incomplete	Complete	Complete	Complete	Complete
003	Complete	Complete	Unverified	Incomplete	Unverified	Unverified	Incomplete	Incomplete
004	Complete	Complete	Complete	Incomplete	Unverified	Complete	Incomplete	Incomplete
005	Complete	Complete	Complete	Incomplete	Unverified	Complete	Incomplete	Incomplete
006	Complete	Complete	Incomplete	Incomplete	Unverified	Complete	Incomplete	Incomplete
007	Complete	Complete	Unverified	Incomplete	Unverified	Complete	Incomplete	Incomplete
008	Complete	Unverified	Complete	Incomplete	Complete	Complete	Incomplete	Incomplete
009	Complete	Unverified	Complete	Incomplete	Unverified	Complete	Incomplete	Incomplete
010	Complete	Complete	Unverified	Incomplete	Complete	Unverified	Incomplete	Incomplete
011	Complete	Complete	Incomplete	Incomplete	Complete	Unverified	Incomplete	Incomplete
0011	Complete	Complete	Unverified	Incomplete	Complete	Unverified	Incomplete	Incomplete
013	Complete	Incomplete	Unverified	Incomplete	Unverified	Unverified	Incomplete	Incomplete
019	Complete	Unverified	Complete	Incomplete	Complete	Complete	Incomplete	Incomplete
021	Complete	Complete	Incomplete	Incomplete	Complete	Complete	Incomplete	Incomplete
096	Complete	Unverified	Complete	Incomplete	Unverified	Unverified	Incomplete	Incomplete
97	Complete	Incomplete	Incomplete	Incomplete	Incomplete	Incomplete	Incomplete	Incomplete
98	Incomplete	Incomplete	Incomplete	Incomplete	Incomplete	Incomplete	Incomplete	Incomplete

- 2) **Dashboard Title:** Give the dashboard a name that describes what it has been customized for, such as “Included patients,” “Incomplete Records,” or “Event 1 Data.”
- 3) **Description/Instructions:** Enter any notes you want the users of this dashboard to see. For example, you might want to list instructions for the different groups or roles who will use this report. Any text added here will appear at the top of the dashboard.

Custom Record Status Dashboard

Customize Dashboard

Configuration Options:
Configuration options are only available to users with design rights. Permissions to each save are listed in the 'Add Edit Bookmarks' section.

Dashboard Title: This will be the title of the dashboard that appears under Project Bookmarks

Description / Instructions: What you type into the **Description/Instructions** will appear at the top of the dashboard

Custom Record Label: This will appear next to each record ID

Filter Logic: Filter Logic is the same as branching logic

Excluded Forms:

Excluded Events:

Header Orientation:

Order By (in development):

Default Custom Dashboard

A custom dashboard allows you to build separate record status views to support various workflows in your project. You can exclude certain forms and events to make it easier to read and faster to render - either by using the config panel or by clicking on the column headers. You can also add record-level filters to omit those records you are not concerned with. Lastly, there are a number of visualization enhancements such as row grouping and vertical alignment that make the table easier to read. Users with project-design rights can save custom dashboards as bookmarks to be used by other users in the project.

Legend for status icons:

- Incomplete
- Incomplete (no data saved) ?
- Unverified
- Partial Survey Response
- Complete
- Completed Survey Response

- 4) **Custom Record Label:** Enter a custom label if you want. It will apply to all records in this dashboard.
- 5) **Filter Logic:** Enter filter logic statement here. Similar to branching logic, if the statement evaluates to true for a report, that report will be displayed.
- 6) **Excluded Forms:** Click on the pencil to exclude any forms you do not want to display on the dashboard.

Choose Forms to Exclude from Dashboard

Select All Select None + Update ✖ Cancel

Demographics

Physical Exam

Labs

GDS

GCSI

PHQ 9

Concomitant Medications

Adverse Events

- 7) **Excluded Events:** Click on the pencil to exclude any forms you do not want to display on the dashboard.

Choose Events to Exclude from Dashboard

Select All Select None + Update ✖ Cancel

Event 1

Event 2

Event 3

- 8) Click on **Save New Dashboard**

Finished result will look something like this:

Included Patients Only

This dashboard only shows patients who are included in the study

Filtered 24 records down to 3 in 0.01 seconds.

Legend for status icons:

- Incomplete Incomplete (no data saved) ?
- Unverified Partial Survey Response
- Complete Completed Survey Response

Showing 3 of 3 records

Displaying Page 1 of 1: "001" through "103"... with 25 records per page Group by Event

Study ID	Included	Event 1								Event 2				Event 3							
		Demographics	Physical Exam	Labs	GDS	GCSI	PHQ 9	Concomitant Medications	Adverse Events	Physical Exam	Labs	Concomitant Medications	Adverse Events	Physical Exam	Labs	GDS	GCSI	PHQ 9	Concomitant Medications	Adverse Events	
001	Included	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
002	Included	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
103	Included	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>