Project Dashboards- REDCap – How-To Guide

Project Dashboards

Project Dashboards are pages with dynamic content that can be added to a project. They can utilize special Smart Variables called Smart Functions, Smart Tables, and Smart Charts (described below) that can perform aggregate mathematical functions, display tables of descriptive statistics, and render various types of charts, respectively. User access privileges are customizable for each dashboard, and anyone with Project Design privileges can create and edit them.

A Wizard is provided on the Project Dashboard creation page to help users easily construct the syntax for Smart Functions, Smart Tables, or Smart Charts, and a basic list of helpful examples is also included. Example dashboard: https://redcap.link/dash1

• Setting project dashboards as "public"

1. If enabled at the system-level (described in detail below), any project dashboard can be enabled as "public", which means it can be accessed at a unique URL that does not require any authentication. Making a dashboard public is useful if you wish for people to view it without having to be REDCap users or log into REDCap. Public dashboards are simply standalone pages that can be viewed by anyone with a link to them.

2. Users can opt to create a custom/short url (via the https://redcap.link service) for any project dashboard that is enabled as "public".

3. System-level setting to allow/disallow public dashboards (on the User Settings page in the Control Center) - By default, normal users will be able to set any project dashboard as public. If you do not want users to do this or even know about this feature, you can completely disable it on the User Settings page. Alternatively, it can be set to "Allow public dashboards with admin approval only". If set to allow public dashboards after approval by an admin, the admin will receive the request from the user via the To-Do List page (and via email, if the email notification setting is enabled on the To-Do List page), and after the admin approves the request, the user will receive an email regarding the response to their request.

• Setting to control data privacy on public dashboards and other public pages

1. The User Settings page in the Control Center has a setting to define the "Minimum number of data points required to display data for any Smart Charts, Smart Tables, and Smart Functions on a *public* project dashboard, survey queue, or survey page". By default, it is set to a value of "11". While only aggregate data is displayed in Smart Charts, Smart Tables, and Smart Functions, if any of these utilize very few data values, it might pose a threat to an individual's data privacy if these are being displayed on *public* dashboards and other public pages (i.e., where authentication is not used).

2. If someone is viewing a public page that has Smart Charts, Smart Tables, and Smart Functions that utilize data that does not meet the minimum data point requirement, instead of displaying the

chart/table/number on the page, it will instead display a notice saying "[INSUFFICIENT AMOUNT OF DATA FOR DISPLAY]" with a pop-up note with details about the minimum data requirements.

3. Project-level override: While this behavior is controlled by a system-level setting, the system level setting can be modified by an administrator via a project-level override for any given project on the "Edit A Project's Settings" page.

4. Note: This setting does not get used when viewing project dashboards inside a project (i.e., at a non-public URL). University of Chicago | Center for Research Informatics | REDCap LTS 11.1.7 Details

• PDF export: Each project dashboard can be exported as a one-page PDF file.

• Dashboard cache: To prevent server performance degradation, each project dashboard will have its content cached (stored temporarily) automatically for up to 10 minutes at a time rather than generating its content in real time every time the dashboard is loaded. It will note at the top right corner of the dashboard page when the dashboard content was last cached. If a user is viewing the dashboard inside a project (i.e., not via a public dashboard link), they have the option at the top right to "Refresh" the dashboard at will, which will refresh/generate its content in real time. Note: The refresh option will only be displayed on the page when the dashboard content is at least 30-seconds old.

Dashboard title:	
User access:	Choose who sees this dashboard on their left-hand project menu (Note: Users with Setup/Design privileges can still access all dashboards via the Project Dashboards page.) ⦿ **All users** – OR – ○ **Custom user access** (Choose specific users, roles, or data access groups who will have access)
Set as "public":	Enabling this feature below will auto-generate a public link for viewing the dashboard without needing to log in to REDCap. ◯ **Dashboard is publicly viewable by anyone with the public link**
Dashboard content: Add any static or dynamic text to be displayed, including Smart Functions, Smart Tables, and Smart Charts. Dashboard help: 🪄 Use the Wizard	Paragraph ∨ — **B** *I* U 🔗 ☰ ☰ ☰ ☰ ↩ ↪ ☰ ☰ ⇤ ⇥ ⊞∨ ⊞ ⊞ A∨ 🖊∨ 🔍 <> I× ⛶

Examples of Smart Functions, Smart Tables, and Smart Charts: Learn how to use ⚡ Smart Variables

[aggregate-mean:age]   [aggregate-count:record_id]   [aggregate-max:weight:R-319PCCFN87]
[stats-table:height,weight,bmi,age]   [stats-table:weight,height:min,max,median]   [stats-table:weight,height:user-dag-name]