Dynamic Report Push

V3.0.1

Description-

The module allows you to use the reporting tool and its built-in logic to select variables to push from the current REDCap project into one or more receiving project(s). Variable names must be the same. Once successfully configured, users can select a button that triggers the push. A data entry trigger can also be used. The configuration module will allow you to add an event name when going from a classic project to longitudinal. You can also delete the event name and/or repeating instrument fields when going from longitudinal to classic projects.

Configuration-

The REDCap builder must first create the report(s) and have tokens for all projects.

Report 1

Name of Report:	Arm 1 Participants
Description (optional): Displayed on page below report name	
	HTML may be used in order to add links or to add style to text. Expand

STEP 1

👤 **User Access:** Choose who can edit and view this report

👁 **View Access:** Choose who sees this report on their left-hand project menu [?]

⦿ **All users**   – OR –   ◯ **Custom user access** (Choose specific users, roles, or data access groups who will have access)

✏ **Edit Access:** Choose who can edit, copy, or delete this report (requires user to have 'Add/Edit/Organize Reports' privileges)

◯ **All users**   – OR –   ⦿ **Custom user access** (Users in ANY groups selected below will have access)
                          Selected users

STEP 2

🏷 **Fields to include in report**   ✚ Quick Add   Add all fields from selected instrument: -- choose instrument -- ▼

Field 1	record_id "Record ID"	▤▼	Instrument: **My First Instrument**	✖
Field 2	first_name "First Name"	▤▼	Instrument: **My First Instrument**	✖
Field 3	interested "Interested in this research pro	▤▼	Instrument: **My First Instrument**	✖
Field 4	daysofweek "What days of the week are y	▤▼	Instrument: **My First Instrument**	✖
Field 5	my_first_instrument_complete "Complete	▤▼	Instrument: **My First Instrument**	✖
Field 6	Type variable name or field label	▤▼	Instrument:	

🏷 **Additional report options** (optional)

☐ Combine checkbox options into single column of only the checked-off options (will be formatted as a text field when exported to stats packages)

STEP 3

🔎 How to use filters and AND/OR logic

🔻 **Filters** (optional)   **Operator / Value**

Filter 1	interested "Interested in this research ▼	AB|	= ▼	Yes ▼	✖
AND ▼					
Filter 2	arm "Arm Assignment" ▼	AB|	= ▼	arm1 ▼	✖
AND ▼					

Report 2

Name of Report:	Arm 2 Participants
Description (optional): Displayed on page below report name	HTML may be used in order to add links or to add style to text. Expand

STEP 1

👥 **User Access:** Choose who can edit and view this report

👁 **View Access:** Choose who sees this report on their left-hand project menu ❓

⦿ **All users** – OR – ◯ **Custom user access** (Choose specific users, roles, or data access groups who will have access)

✏ **Edit Access:** Choose who can edit, copy, or delete this report (requires user to have 'Add/Edit/Organize Reports' privileges)

◯ **All users** – OR – ⦿ **Custom user access** (Users in ANY groups selected below will have access)

STEP 2

🏷 **Fields to include in report**   ➕ Quick Add   Add all fields from selected instrument: -- choose instrument -- ▾

Field 1	record_id "Record ID"	▤▾	Instrument: **My First Instrument**	✖
Field 2	first_name "First Name"	▤▾	Instrument: **My First Instrument**	✖
Field 3	interested "Interested in this research pr	▤▾	Instrument: **My First Instrument**	✖
Field 4	daysofweek "What days of the week are y	▤▾	Instrument: **My First Instrument**	✖
Field 5	my_first_instrument_complete "Complete	▤▾	Instrument: **My First Instrument**	✖
Field 6	Type variable name or field label	▤▾	Instrument:	

🏷 **Additional report options** (optional)

☐ Combine checkbox options into single column of only the checked-off options (will be formatted as a text field when exported to stats packages)

STEP 3

ⓘ How to use filters and AND/OR logic

🏷 **Filters** (optional)   **Operator / Value**

Filter 1	interested "Interested in this research ▾	ABI	= ▾	Yes ▾	✖
AND ▾					
Filter 2	arm "Arm Assignment" ▾	ABI	= ▾	arm2 ▾	✖

Click on External Modules and then Configure.

Applications ⊟

📅 Calendar
📥 Data Exports, Reports, and Stats
📤 Data Import Tool
📋 Data Comparison Tool
📊 Logging
💬 Field Comment Log
📁 File Repository
👤 User Rights and 👥 DAGs
🔒 Record Locking Customization
✅ E-signature and Locking Mgmt
📋 Data Quality
🖥 API and 🖥 API Playground
📱 REDCap Mobile App
🔀 External Modules   **← Click Here**

Now Click Configure

⊕ Enable a module

Currently Enabled Modules

Search enabled modules

Dynamic Report Push - v2.0.1 [Discoverable]
Module that allows for data from a report in one project to be pushed into a different project
📄 View Documentation

Configure

Disable

Enter PID or Project Name to keep documentation of the linked project. Recording this information is important in case the builder is not available and a different person needs to follow the data flow.

Configure Module: Dynamic Report Push ✕

	1. Report Push:	+
		−

1. Receiving project's PID:
* must provide value

`16 Arm1`

1. Token for current project:
* must provide value

`token goes here`

1. Token for project where data will be pushed:
* must provide value

`token goes here`

1. ID for Dynamic Report that will be pushed:
* must provide value

`1`

1.
ADD Event Name (use when going from classic to longitudinal. Leave blank if both projects are classic):

`event_1_arm_1`

1. Delete Event Name (Use when going from longitudinal to classic project):

⚪ Delete event name field

1.
Delete Repeating Instrument and Instance fields (Use when going from repeating to classic project):

⚪ Delete repeating fields

	2. Report Push:	+
		−

2. Receiving project's PID:
* must provide value

`16 Arm2`

2. Token for current project:
* must provide value

`token goes here`

2. Token for project where data will be pushed:
* must provide value

`token goes here`

2. ID for Dynamic Report that will be pushed:
* must provide value

`2`

2.
ADD Event Name (use when going from classic to longitudinal. Leave blank if both projects are classic):
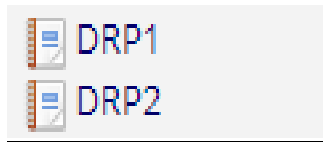
`pre_arm_2`

2. Delete Event Name (Use when going from longitudinal to classic project):

⚪ Delete event name field

2.
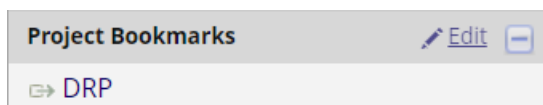Delete Repeating Instrument and Instance fields (Use when going from repeating to classic project):

⚪ Delete repeating fields

Super users and project builders can click on of the following buttons to transfer report information into the linked project.

DRP1
DRP2

To give all users the ability to transfer data you will need to create a 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	DRP	https://sand.redcap.duke.edu/redcap/redcap_v10.6.18/ExternalModules/?prefix=dynamic_report_push&page=push_now&NOAUTH=&pid=185	Advanced Link ▾	●All users ○Selected users	✔	☐	☐	✖

Project Bookmarks   ✏ Edit ⊟

➡ DRP
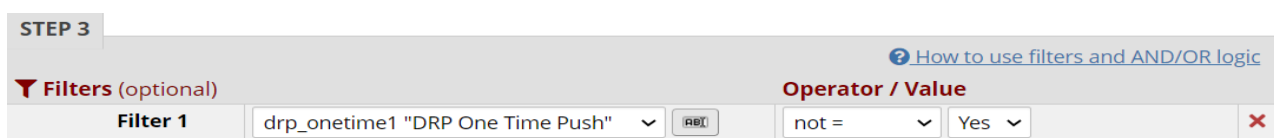
Changes in version 3.0.1

The following revisions should help with larger and more complicated projects.

Builders can configure reports that move data into different loops of the module (DRP1 and DRP2). A use case for this is when it is necessary to trigger some fields each time users save a record but others on demand.

1. One-Time-Push Flag: ✔

Builders can configure a one-time push to limit the process from running each time. You will need to create a field called drp_onetime1 in DRP1 or drp_onetime2 in DRP2. Include logic in your report to drop off records once the push value is = '1'.

STEP 3				
			❷ How to use filters and AND/OR logic	
▼ **Filters** (optional)			**Operator / Value**	
Filter 1	drp_onetime1 "DRP One Time Push" ▾ [ABC]		not = ▾ Yes ▾	✖

Words of caution.

ID Creation-It will be less risky if you do not create records in the linked project that is receiving data. However, if that is necessary, be sure to think through how to avoid overwriting data in the second project.

Record Locking-Best practice will be to lock records in both projects when locking data. If a change needs to be made then unlock the linked record in both projects and lock it back after the change. The module can stop working if a record is locked in the receiving project and you are trying to update data.

Contact for issues-

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