Managing **Project-Users** & their **User-Rights** in a REDCap Project
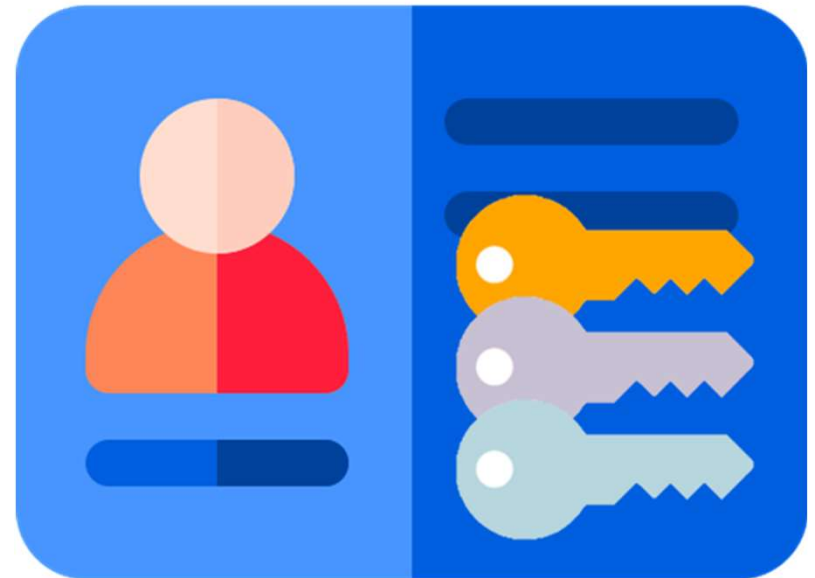
User Rights: Managing & Assigning Rights

- REDCap Users are added by the REDCap Administrator. *(Staff **DO NOT** automatically have a REDCap Account.)* Users **MUST ACTIVATE** their account(s) before it is valid for use.

- Users can be added and removed from individual projects by the **Project Owner** and **Project Administrator** who have access to the project's User Rights module.

⚠️ The rights of each User must be defined depending on the user's profile and role in the Project. **DO NOT give a user more access rights than they need**. *Eg: A Temp staff should not be allowed to export any data.*

⚠️ It is recommended to check all user access rights on a regular basis. **Delete/remove users from your Project when they no longer part of the Project**.

❗ IMPORTANT

As the **Project Owner**, you have **significant obligations and responsibilities** in supervising and managing the use of the REDCap Project.

*The Project Owner shall also be **responsible for <u>actively</u> supervising and managing the users and their access rights** to the Project Owner's REDCap Project(s), and remove the User's access to the Project when it is no longer required.*

For more details, please refer to the **NHG REDCap System Usage Agreement**.

User Rights: Managing & Assigning Rights

Applications

- Project Dashboards
- Alerts & Notifications
- Calendar
- Data Exports, Reports, and Stats
- Data Import Tool
- ≠ Data Comparison Tool
- Logging
- Field Comment Log
- File Repository
- **User Rights** and DAGs
- Customize & Manage Locking/E-signatures
- Randomization

- Clicking on '**User Rights**' (under **Applications**) will bring you to a screen displaying the **current users** on the project, and the **rights** to which they have access.

- You may also add new users to your project with customized rights, or create '**Roles**' (such as P.I., Data Manager, or Statistician) with specific rights so that you may assign new users to a role right away.

- For research teams of 5 or more people, creating Roles, with pre-defined user-rights, is recommended.

⚠️ **For research-ethics regulated Projects (ie: DSRB), the User-Rights / Roles assigned to each REDCap Project member must be properly documented in your Site Study File, under the 'Study Delegation Log'.**

User Rights: Add/Remove Users in your Project

Project Home and Design ⊟

🏠 Project Home · ⋮≡ Project Setup
📝 Designer · 📊 Dictionary · 📕 Codebook
⬛ Project status: **Development**

Data Collection ⊟

⊞ Record Status Dashboard
  - View data collection status of all records
📄 Add / Edit Records
  - Create new records or edit/view existing ones
Show data collection instruments

Applications ⊟

🖥 Project Dashboards
🔔 Alerts & Notifications
📅 Calendar
📤 Data Exports, Reports, and Stats
📥 Data Import Tool
≠ Data Comparison Tool
📋 Logging
💬 Field Comment Log
📁 File Repository
👤 User Rights and 👥 DAGs
🔒 Customize & Manage Locking/E-signatures
Data Quality

Test Demo Project PID 891

🏠 Project Home   ⋮≡ Project Setup   👤 User Rights   👥 Data Access Groups

This page may be used for granting users access to this project and for managing the user roles to which you may assign users (optional). User roles are useful when you will have se allow you to easily add many users to a role in a much faster manner than setting their use to categorize users within a project. In the box below you may add/assign users or create to make modifications to any existing user or role in the project, as well as view a glimpse

🟩 Uplo ⚠

Add new users: Give them custom user rights or assign them to a role.

Add new user | ➕ Add with custom rights

— OR —

Assign new user to role | 👤 Assign to role ▾

Create new roles: Add new user roles to which users may be assigned.

Enter new role name | ➕ Create role

(e.g., Project Manager, Data Entry Person)

Role name (click role name to edit role)	Username or users assigned to a role (click username to edit or assign to role)	Expiration (click expiration date to edit)	Project Design and Setup	User Rights	Data Access Groups	Data Viewing Rights
—	**redcap_admin** (NHG REDCap Administrator)	never	✔	✔	✔	1 View & Edit

Adding a User to your Project
1) Type the person's name here.
2) A list of matching names will appear.
3) Select the appropriate name.
4) Click on **{Add with custom rights}**
5) Assign the user-rights as required.

IMPORTANT
The person must already **have activated** their REDCap account before you can add them.

Editing user-rights, or Removing Users from your Project
1) This table shows all users who have access to your Project and their respective user-rights.
2) Click on the **{Username}**. A menu will appear.
3) Click on **{Edit User Privileges}**
4) A new menu will appear that will allow you to either edit their user-rights, or to remove their access to your Project. Follow the on-screen instructions.

User Rights: Add/Remove Users in your Project

Editing user-rights, or Removing Users from your Project

1) Click on the **{Username}**. A menu will appear.
2) Click on **{Edit User Privileges}**
3) A new menu will appear that will allow you to either edit their user-rights, or to remove their access to your Project. Follow the on-screen instructions.

Editing existing user "z91"

You may set the rights for the user below by checking the boxes next to the application tools to which you wish to grant them access. You may also grant them or deny them access to individual data collection instruments, if so desired. To save your selections, click the "Save Changes" button at the bottom of the page.

Editing existing user "z91"

Basic Privileges

☒ Expiration Date
(if applicable) _____ (D/M/Y)

Highest level privileges:
- ☰ Project Design and Setup ☑
- 👤 User Rights ☑
- 👥 Data Access Groups ☑

Other privileges:
- 🔁 Survey Distribution Tools ☑
- 🔔 Alerts & Notifications ☑
- 📅 Calendar ☑
- 🔍 Add/Edit/Organize Reports ☑
  Also allows user to view ALL reports (but not necessarily all data in the reports)
- 📊 Stats & Charts ☑
- 📥 Data Import Tool ☑
- ≠ Data Comparison Tool ☑
- 📋 Logging ☑
- 📁 File Repository ☑

Privileges for Viewing and Exporting Data

Data Viewing Rights pertain to a user's ability to view or edit data on pages in the project (e.g., data entry forms, reports). Users with 'No Access' Data Viewing Rights for a given instrument will not be able to view that instrument for any record, nor will they be able to view fields from that instrument on a report. Data Export Rights pertain to a user's ability to export data from the project, whether through the Data Exports page, API, Mobile App, or in PDFs of instruments containing record data. Note: Data Viewing Rights and Data Export Rights are completely separate and do not impact one another.

	Data Viewing Rights			Data Export Rights			
	No Access (Hidden)	Read Only	View & Edit	No Access	De-Identified *	Remove All Identifier Fields	Full Data Set
Date Of Visit	○	○	◉	○	○	○	◉
Informed Consent	○	○	◉	○	○	○	◉
Informed Consent 2	○	○	◉	○	○	○	◉
Background Information	○	○	◉	○	○	○	◉
Medical History	○	○	◉	○	○	○	◉
FRAIL Scale	○	○	◉	○	○	○	◉
Personal Health Information	○	○	◉	○	○	○	◉
Group Assignment	○	○	◉	○	○	○	◉
Anthprometric Measurements	○	○	◉	○	○	○	◉
Physical Assessment 1.1	○	○	◉	○	○	○	◉

Save Changes | Cancel | Remove user

Editing User-rights

1) This shows the name of the User for whom you are editing the User-rights.
2) **Checked boxes** indicate that the User-right is **granted** to the User.
3) **Unchecked boxes** indicate that the User-right is **not granted** to the User.
4) When finished, click on the [**Save Changes**] button.

⚠️ **Remember NOT to give excessive rights unless it is necessary.**

⚠️ **The User-Rights / Roles assigned must be properly documented in your Site Study File, under the 'Study Delegation Log'.**

Removing Users from your Project
1) Click on the **{Remove User}**.

User Rights: Highest Level Privileges

⚠️ **Project Design and Setup**

Grants user access to add, update, or delete any forms within the project. Also allows user to enable and disable project features and modules. *We recommend that only a limited number of users (such as senior Project members who are familiar with REDCap) have access to this.*

⚠️ **User Rights**

Grants user access to change the rights and privileges of all users on a particular project, including themselves. *We recommend that ONLY the Project Owner and the Project Administrator have this right.*

⚠️ **Data Access Groups**

Grants user access to create and add users to data access groups. User should not assign their self to a data access group or they will lose their access to update other users to data access groups. Therefore, user with this privilege should be able to see all project data regardless of group. *We recommend that only a limited number of users have access to this right.*

Highest level privileges:
- ☰ Project Design and Setup ☑
- 👤 User Rights ☑
- 👥 Data Access Groups ☑

⚠️ **IMPORTANT: <u>DO NOT</u>** give everyone in the Project these user-rights unless absolutely necessary.

User Rights: Privileges for Data Reports

⚠️ **Data Export Tool** **(IMPORTANT)**

This gives the user access to export all or selected data fields. The default access is "**De-Identified**". The other access options are:

- **No Access:** The user will not be able to export data.

- **De-Identified:** All free-form text fields will be removed, as well as any date/time fields and *marked* Identifier fields are automatically removed from export.

- **Remove all tagged Identifier* fields:** This removes fields marked as identifiers. However, it does **NOT** automatically remove non-validated text fields or field notes and does **NOT** date shift.

⚠️ **Full Data Set:** User has access to export all data.
ONLY the Project Owner and Project Administrator should have this right.

⚠️ **Identifier Fields: This are fields which have been marked during the Instrument/Form creation process as being an *"Identifier"* (See Slide 48). The de-Identified options will NOT work if the data fields have NOT been marked as an "Identifier" prior to data export.**

Data Export Rights

No Access	De-Identified *	Remove All Identifier Fields	Full Data Set
○	○	○	◉
○	○	○	◉
○	○	○	◉
○	○	○	◉

User Rights: Privileges for Data Reports

⚠️ **Add / Edit / Organize Reports (IMPORTANT)**
This gives the user access to build and edit simple queries within the project. If user does not have access to a data collection instrument that the report is pulling data from, access will be denied for report.

Stats & Charts
This gives the user access to view simple statistics on each field in the project. If user does not have access to a data collection instrument, that instrument will not be listed on the page.

🔍 Add/Edit/Organize Reports ☑
Also allows user to view ALL reports (but not necessarily all data in the reports)

📊 Stats & Charts ☑

IMPORTANT: PROTECTING THE EXPORTED DATA

- **It is the responsibility of BOTH the Project Owner, and the Project member** *(who exported the data from the REDCap Project to any electronic data storage device such as computers, laptops, mobile devices, thumbdrives etc)* **to take adequate measures to protect the exported data and ensure its proper use.**

-

- **All Project members with 'Export-Data' user-right should be trained and knowledgeable in securely handling the exported data.**

- **The exported data should only be stored on a data storage device which is secured, and is in compliance with your Institution's Personal Data Protection Act (PDPA) and other applicable data security standards and regulations.**

- **The Electronic File which contains the exported data (eg: csv or xls) should also be protected with a password at all times to prevent unauthorised access/viewing.**

- **Project Owners are urged to exercise caution when assigning this user-right, and to ensure that the exported data remains accountable and secured at all times.**

User Rights: Other Privileges (1)

Manage Survey Participants *(if Survey mode is activated)*

Grants user access to manage the public survey URLs, participant contact lists, and survey invitation log.

Calendar

Grants user access to track study progress and allows user to update calendar events, such as mark milestones, enter ad hoc meetings

⚠️ **Data Import Tool (IMPORTANT)**

Grants user access to download and modify import templates for uploading data directly into the project bypassing data entry forms.

Data Comparison Tool

Grants user access to see two selected records side by side for comparison.

Other privileges:

- Survey Distribution Tools ☑
- Alerts & Notifications ☑
- Calendar ☑
- Add/Edit/Organize Reports ☑
  Also allows user to view ALL reports (but not necessarily all data in the reports)
- Stats & Charts ☑
- Data Import Tool ☑
- Data Comparison Tool ☑
- Logging ☑
- File Repository ☑
- Randomization ☑ Setup
  What is randomization? ☑ Dashboard
  ☑ Randomize
- Data Quality ☑ Create & edit rules
  What is Data Quality? ☑ Execute rules

User Rights: Other Privileges (2)

Logging
Grants user access to view the audit trail for the project.

File Repository (**DISABLED**)
Grants user access to upload, view, and retrieve project files and documents (ex: protocols, instructions, announcements). In addition, it stores all data and syntax files when data is exported using the Data Export Tool.
* This Function is not available.

Data Quality
Grants user access to find data discrepancies or errors in project data by allowing user to create & edit rules; and execute data quality rules. If user does not have access to a data collection instrument that the query is referencing, access will be denied for query results.

API (**DISABLED**)
Application Programming Interface.
The REDCap API module **cannot be used** in NHG.

Other privileges:

- Survey Distribution Tools ☑
- Alerts & Notifications ☑
- Calendar ☑
- Add/Edit/Organize Reports ☑
  Also allows user to view ALL reports (but not necessarily all data in the reports)
- Stats & Charts ☑
- Data Import Tool ☑
- Data Comparison Tool ☑
- Logging ☑
- File Repository ☑
- Randomization ☑ Setup
  What is randomization? ☑ Dashboard
  ☑ Randomize
- Data Quality ☑ Create & edit rules
  What is Data Quality? ☑ Execute rules

User Rights: Project Records

Settings pertaining to the Project Records

Create Records

Grants user access to add record and data to database.

⚠️ **Rename Records**

Grants user access to change key id of record.

We suggest that only a limited number of senior users have access.

⚠️ **Delete Records**

Grants user access to remove an entire record.

We suggest that only the Project Owner and the Project Administrator have this right.

User Rights: Record Locking & E-Signatures

Settings pertaining to record locking and E-signatures:

Record Locking customization

Grants user access to customize record locking text.

Lock/Unlock Records

Grants user access to lock/unlock a record from editing. Users without this right will not be able to edit a locked record. User will need "Read only" or "View & Edit" to lock/unlock a data collection instrument

Settings pertaining to record locking and E-signatures:

🔒 Record Locking Customization ☑

🔓 Lock/Unlock Records (instrument level)
Users with locking privileges also have access to the E-signature and Locking Mgmt page on the left-hand Applications menu.
⊞ Watch video about locking
- ◉ Disabled
- ○ Locking / Unlocking
- ○ Locking / Unlocking with E-signature authority
  What is an E-signature?

🔓 Lock/Unlock *Entire* Records (record level) ☑

NOTE: It is important to note that instrument level locking and record level locking are independent features that are governed by separate user privileges (as seen above). You must have explicit permission to either one in order to perform that specific locking action. Also, record locking is a higher-level locking than instrument locking, which means that an entire record may be locked or unlocked while one or more instruments are currently locked, but an instrument cannot be locked or unlocked while the entire record is locked.

User Rights: Data Viewing Rights

	Data Viewing Rights		
	No Access (Hidden)	Read Only	View & Edit
Date Of Visit	○	○	◉
Informed Consent	○	○	◉

Data Viewing Rights

Grants the user "**No Access**", "**Read Only**", or "**View & Edit**" rights to the data collection Instruments that are available in your Project.

- **No Access**: The User will **not** be able to view or edit data on that Form.

- **Read Only**: The User will be **able** to view the data in the Form, but will **not be able** to edit the data.

- **View & Edit**: The User will be **able** to both view and edit the data in the Form.

⚠️ **IMPORTANT**

- This **ONLY** controls the **User's ability to view/edit data** on a **REDCap Form or Report**.
- It **DOES NOT CONTROL** the user's ability to **export/import data**.
- To control a user's right to export/import data, see "**Data Export Tool**" and "**Data Import Tool**".

Other Resources

Here are some learning resources from the Internet about managing Users and their user-rights in your REDCap Project. *Do note that some functions/descriptions may differ (due to different REDCap versions) or the rules/processes mentioned may not be applicable to you.*

- **REDCap User Rights** (YouTube video, 2:03min) by Center for Health Insights
  (https://www.youtube.com/watch?v=l1x6H106_5o)

- **Managing REDCap User Accounts** (YouTube Video, 1:44min) by UMass Medical IT
  (https://www.youtube.com/watch?v=-wxgXW3xFuo)

- **REDCap User Rights Best Practices** (PDF) by the University of Chicago
  (https://cri.uchicago.edu/wp-content/uploads/2015/12/REDCap-User-Rights-Best-Practices.pdf)

REDCap Learning Resources

If you are new to REDCap, we highly recommend that you take some time to watch the official REDCap Training videos. The videos will help you to get started on the basics of the REDCap system and provide a general overview for some of REDCap's preliminary concepts and features. These videos and more are available on the NHG REDCap webpage here.

Questions?

Contact us at **redcap@nhg.com.sg** if you have any queries for us.