# Navigation Sheet – User Rights & DAGs

Compliance & Data Office

**Research Support Office** 



# Introduction

When using REDCap in your research project, it is very important to restrict who has access to what information.

It is the project owner's / registered PI's responsibility to add (and remove) relevant users to their project and to make sure that individual user rights and permissions are assigned correctly.

REDCap's *User Rights* section provides the option to limit data access on various different levels. This guide provides an overview of how to add users to your project and how to set each user's permissions appropriately. In addition, this guide explains how to set up Data Access Groups (DAGs) and how to use them.

We also recommend reading through our <u>*Tips & Best Practices*</u> section at the end of this document.

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# Adding Users to Your Project

Before being able to access a project in REDCap, the person needs to create a user account. More information on how to create a REDCap user account can be found on the <u>staff portal</u>.

**Please note** that simply adding someone's email address in your project will not provide that person access to your project if they don't already have an active user account in REDCap. You can only add users to your project <u>after</u> they create their user account.

To add an existing user account to your project, navigate to *User Rights* in the menu on the left-hand side.



Type the person's name into the textbox next to *Add with custom rights* and choose the correct user in the appearing drop-down list. For example, you want to add Hermione Granger to your project:



Once you select Hermione's account and click on *Add with custom rights,* REDCap will ask you to set her user rights. **It is important to not simply** select all options when setting user rights, but to think carefully about what access each user actually needs.

If no drop-down options are generated, the person you are trying to add has not yet created their user account. For example, REDCap does not suggest a user account for Harry Potter below, Harry still has to create his account before he can be added to your project:

new users: Give them custom user right	s or assign them to a role.
Harry Potter	+ Add with custom rights
— OR —	
Assign new user to role	🗻 Assign to role 👻

If you try to add Harry to your project anyway by writing out his email address, his email will appear in the list of users below, but it will <u>not</u> be connected to a user account and Harry will <u>not</u> automatically be invited to REDCap:



If a user account has been added correctly, their name appears in brackets next to their email address:

Role name (click role name to edit role)	<b>Username</b> or users assigned to a role (click username to edit or assign to role)	<b>Expiration</b> (click expiration date to edit)
	harry.potter@hogwarts.com	never
_	<b>hermione.granger@hogwarts.com</b> (Hermione Granger)	never

If no name appears next to the email address, no actual user account has been added to your project and that person will <u>not</u> be able to access your project.

# **Creating Roles in Your Project**

Instead of designating user rights individually for each user, it is possible to create user roles with pre-defined user rights.

This can be helpful if your project will have several users who require the same user rights, for example, data entry staff. Using roles also streamlines the process of adding users to a project and ensures that each user is given relevant access from the start.

First, you navigate to User Rights and create different roles for your project:

Add new us	er	+	Add with custo	m right	5				
— OR —			ad marcasto	6					
Assign new	user to role		Assign to role	-					
Create new roles	: Add new user roles to which u	sers may be	assigned.	1					
Statistician		+	Create role						
(e.g., Project Ma	nager, 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)	Data Access Group (click DAG to assign user)	Project Design and Setup	User Rights	Data Access Groups	Data Viewing Rights	Data Export Rights	Alerts & Notifications
	hermione.granger@hogwarts.com (Hermione Granger)	never	-	×	×	×	1 View & Edit	1 De-Identified	×
-	musip-siguz@eduid.se (Josefine Doe)	never	—	~	~	~	1 View & Edit	1 Full Data Set	~
Data Coordinator	[No users assigned]			×	×	×	1 View & Edit	1 Full Data Set	×
Data Entry	[No users assigned]			×	×	×	1 View & Edit	1 No Access	×
	The second s			×	×	×	1 Read Only	1 De-Identified	×
Monitor	[No users assigned]								
Monitor Principal Investigator	[No users assigned] [No users assigned]			-	-	~	1 View & Edit	1 Full Data Set	-

Once roles with relevant user rights have been created, you can add users via the text box next to *Assign to role*:

prof.snape@hogwarts.wz	🗻 Assign to role 👻
	🖾 Notify user via email? 🔽
ate new roles: Add new user roles to which users ma	Assign To DAG: [No Assignment] 🗸
Enter new role name	<b>≜</b> + Select Role: Data Entry ✓
(e.g., Project Manager, Data Entry Person)	Assign <u>Cance</u>

Alternatively, it is possible to add existing users to a role by clicking on a username – *Assign to tole* – select relevant role – click on *Assign*:

Role name (click role name to edit role)	Username or users assigned to a role	Expiration (click expiration	Data Access Group (click DAG to assign	Project Design and
		User actions:		Setup
-	hermione.granger@hogwarts.com	🛃 Edit user privile	eges —	×
	(Hermione Granger)	Assign to role	⇒	
-	musip-siguz@eduid.se (Josefine Doe)	+ Select Role: Sta	tistician 🗸	4
Data Coordinator	[No users assigned]		Assign Cancel	×
Data Entry	prof.snape@hogwarts.wz (Professor	never		×

After assigning users to different roles, their user accounts will show up next to their assigned role:

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)	Data Access Group (click DAG to assign user)	Project Design and Setup	User Rights	Data Access Groups	Data Viewing Rights	Data Export Rights	Alert Notifica
	musip-siguz@eduid.se (Josefine Doe)	never	-	~	~	-	1 View & Edit	1 Full Data Set	~
Data Coordinator	[No users assigned]			×	×	×	1 View & Edit	1 Full Data Set	×
Data Entry	<pre>prof.snape@hogwarts.wz (Professor Snape)</pre>	never		×	×	×	1 View & Edit	1 No Access	×
Monitor	[No users assigned]			×	×	×	1 Read Only	1 De-Identified	×
Principal Investigator	[No users assigned]			-	~	-	1 View & Edit	1 Full Data Set	~
Statistician	hermione.granger@hogwarts.com (Hermione Granger)	never		×	×	×	1 Read Only	1 De-Identified	×

Whether using individual user rights or roles, it is important to regularly review all users and their user rights within your project(s).

This can easily be done by reviewing the <u>User Access</u> <u>Dashboard</u> (see relevant section below).

# **Overview of User Rights**

### **Basic User Privileges**

**Expiration Date:** Gives users access to the project until a specified date.

<u>Project Design & Setup:</u> Allows users to make changes to the project (e.g. add instruments / variables, enable / disable project features)

<u>User Rights:</u> Allows users to assign and change user rights for themselves and others.

Data Access Groups (DAGs)\*: Allows users to create DAGs and assign other users to DAGs (see below section "<u>Data Access Groups (DAGs)</u>" for more information).

<u>Survey Distribution Tools</u>: Gives users access to the public survey link, participant list (which might include email addresses) and survey invitation log.

<u>Alerts & Notifications:</u> Allows users to construct alerts and send customised email notifications to one or more recipients using conditional logic.

<u>Calendar & Scheduling\*:</u> Allows users to access the calendar and schedule calendar events.

Add/Edit/Organise Reports\*: Allows users to

add/edit reports via Data Exports, Reports and Stats. However, data viewing rights might affect what data a user actually sees (see below section "Privileges for Viewing and Exporting Data" for more information on data viewing rights).

<u>Stats & Charts\*</u>: Allows users to view collected data graphically and to view descriptive statistics for all variables in the project.

**Data Import Tool:** Allows users to import data into the project (as opposed to manual data entry).

B	asic Privileges	
×	Expiration Date (/ oppicobie)	(D/M/Y)
Hig	hest level privileges:	
泪	Project Design and Setup	<b>V</b>
1	User Rights	
ł	Data Access Groups	
Otł	ner privileges:	
	Survey Distribution Tools	8
Ļ	Alerts & Notifications	0
Ħ	Calendar & Scheduling	2
Q	Add/Edit/Organize Reports Also allows user to view ALL reports (but not necessarily all data in the reports)	0
<u>.11</u>	Stats & Charts	
Ş	Data Import Tool	
¥	Data Comparison Tool	0
	Logging	2
6	File Repository	8
9	Data Quality <u>What is Deta Quality</u>	Create & edit rules Execute rules
	API What is the REDCap API2	API Export
Set	tings pertaining to the REDCap Mobile App:	
0	REDCap Mobile App What is the REDCap Mobile App2	Allows user to collect data offline in the mobile app
	Allow user to download data for all records to the app?	0
Set	tings pertaining to project records: Explain these settings	
ŧ	Create Records	<b>V</b>
₽	Rename Records	
-	Delete Records	D
	* Includes ability to delete all data on an instrument or on a repeating event.	
Set	tings pertaining to record locking and E-signatures:	
۵	Record Locking Customization	0
â	Lock/Unlock Records (instrument level)	Disabled
	Users with locking privileges also have access to the E-signature and Locking Mgmt page on the left-hand Applications menu.	O Locking / Unlocking
	B Watch video about locking	
ô	Lock/Unlock *Entire* Records (record level)	0

Data Comparison Tool: Allows users to compare two records as well as repeated measures of the same record side by side.

**Logging:** Allows users to view all project activity (which user has done what within the project).

**File Repository:** Allows users to access the file repository and any files stored there (this might include consent forms if using e-consent).

<u>**Data Quality:**</u> Gives users access to data quality features (running, creating, and editing data quality rules).

<u>API (Application Programming Interface)</u>: Allows users to request API tokens and access API features. API allows external applications to connect to REDCap and is used to programmatically interface REDCap with apps, widgets, and other projects.

**REDCap Mobile App\*:** Gives users the ability to use REDCap's mobile app, which can be installed on mobile devices (e.g. tablets, mobile phones) and used for offline data collection. That data can then be synched with the corresponding project when an internet connection becomes available.

<u>Create Records:</u> Allows users to create new record IDs and add participants to the project.

<u>**Rename Records:**</u> Allows users to rename existing records (e.g. change the record ID number).

Delete Records: Allows users to delete records from the project.

<u>**Record Locking Customisation:**</u> Allows users to customise the recordlocking text and options as well as e-signature options on data collection instruments.

Lock/Unlock Records (instrument level): Allows users to lock and unlock individual instruments (e.g., after data entry is complete).

Lock/Unlock "entire" Records (record level): Allows users to lock and unlock all forms and surveys (instruments) at once for any given record.

\*Instruction video can be found in REDCap

# Privileges for Viewing and Exporting Data

The section *Privileges for Viewing and Exporting Data* lets you set user rights for each individual instrument in your project.

Privileg	es for Vie	ewinga	and Exp	orting Data	1			
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	Edit survey responses	No Access	De- Identified*	Remove All Identifier Fields	Full Data Set
Demografi (survey)	0	0	۲		0	0	۲	0
Undersökn ing 1 (survey)	0	0	۲		0	0	0	۲
Undersökn ing 2 (survey)	۲	0	0		۲	0	0	0

By default, users have full access to all instruments and can view and edit instruments and survey responses. However, access for both *Data Viewing Rights* and *Data Export Rights* can (and should) be customised per user or role:

#### **Data Viewing Rights**

<u>No Access (Hidden)</u>: Users cannot view or edit the instrument or any data in it. Users might still be able to view the data in data exports (see "Data Export Rights" below).

<u>Read Only:</u> Users can view the instrument and its data but cannot edit the data.

<u>View & Edit:</u> Users can view the instrument and edit data in data entry forms in REDCap.

<u>Edit Survey Responses:</u> Users can edit survey responses and alter survey data entered directly by participants.

### Data Export Rights

No Access: Users are not able to export data for the instrument.

<u>De-Identified:</u> Removes all free-form text fields as well as any date/time fields and Identifier fields from the export file.

<u>Remove All Identifier Fields:</u> Upon export, all data belonging to fields marked as *Identifier* fields is removed. <u>Variable Name</u> (utilized in logic, cales, and exports)

**Please note:** It is the researcher's responsibility to correctly mark relevant fields as *Identifiers* when building their instruments in *Designer*.

name	Enat base	ble auto naming of variable d upon its Field Label?
ONLY letters, numbers, and	underscores	
How to use [ 🗲 ] Smart Va	riables 🖉 Piping 📑	Field Embedding
Validation? (optional)	None	~
- or -		
- or - select ontology ser	vice	~
- or - select ontology ser Required?*  No C * Prompt if field is blank	vice ) Yes	~
- or - select ontology ser Required?*  No C * Prompt if field is blank Identifier?  No	vice ) Yes Yes	~

<u>Full Data Set:</u> Users can export the full data set of the instrument without restrictions.

# Data Access Groups (DAGs)

It is possible to limit access to data within REDCap by adding users to so-called Data Access Groups (DAGs). Once added to a DAG, a user can only access records and data created by other users in the same DAG. This might be useful in, for example, multicentre studies where different sites should not have access to each other's data.



### Setting up DAGs and assigning users

Any user with DAG rights (see "<u>Basic User Privileges</u>" above) can create DAGs and add users as follows:

 Go to DAGs in the left-hand side menu and create new groups. Once a Data Access Group is created, it is assigned a unique group name and ID number:

REDCap	Demo Data Acc	ess Groups (D	AGS) PID 2640					
Logged in as musip-siguz@eduid.se     Log out	A Project Home	<sup>2</sup> Project Setup	User Rights	🔆 Data Access Group	os			
REDCap Messenger     Contact REDCap administrator	Access to certain proje	ct records may be lin	nited by using Data	a Access Groups (DAGs), ii	n which only	UDEO: How	to use Data Acce Access Group	ess Group can
Project Home and Design	access records created	by users within that	group. This may b	e useful in the case of a r	multi-site or n	ulti-group project that re	quires that gro	oups not
♠ Project Home → ﷺ Project Setup 🕑 Designer → 🛐 Dictionary → 🚍 Codebook	be able to access anoth DAG Switcher feature t	ner group's data. One o allow users to mov	re you have create re themselves in an	d DAGs, if you would like ad out of specific DAGs or	your users to their own. A	be in multiple DAGs, you dditional instructions	i may use the o	ptional
Project status: Development					Uploa	or download DAGs/Use	r-DAG assignm	ents 🗢
Data Collection 📃	+ Create new group	s: Add new data acce	ess groups to which	sers may be assigned.			0.10.000.0.0.	
🖽 Record Status Dashboard	Enter new grou	up name	+ Add Group					
- View data collection status of all records  Add / Edit Records  - Create new records or edit/view existing ones	Assign user to a	group: Users may be	assigned to any dat	ta access group. To assign u	isers to <u>multip</u>	le groups, use the DAG Swit	tcher at the bott	om.
- View data collection status of all records     Add / Edit Records     - Create new records or edit/view existing ones     Show data collection instruments	Assign user to a part of the second s	group: Users may be elect User	assigned to any dat	ta access group. To assign u	users to <u>multip</u> nt] 👻 🔝	le groups, use the DAG Swit	cher at the bott	om.
- View data collection status of all records  Add / Edit Records  - Create new records or edit/view existing ones Show data collection instruments  Applications	Assign user to a Assign user - Se	group: Users may be elect User	assigned to any dat	ta access group. To assign u	users to <u>multip</u> nt] 🗸 🔝	l <u>e groups</u> , use the DAG Swit <mark>Assign</mark>	cher at the bott	om.
- View data collection status of all records	Assign user to a Assign user - Se	group: Users may be elect User	e assigned to any dat Users in group	ta access group. To assign u	nt] V	Le groups, use the DAG Swit Assign Unique group name @ (auto-generated)	Group ID number @	om. Delete group?
- View data collection status of all records  Add / Edit Records  - Create new records or edit/view existing ones  show data collection instruments  pplications  Alerts & Notifications  Multi-Language Management	Assign user to a ; Assign user - Se Data Access Groups Site A	group: Users may be elect User	users in group	a access group. To assign u	nt] V	Le groups, use the DAG Swit ssign Unique group name @ (auto-generated) site_a	Group ID number 🕑 13	om. Delete group?
- View data collection status of all records  Add / Edit Records  - Create new records or edit/view existing ones  Show data collection instruments  pplications  Alerts & Notifications  Alerts & Notifications  Calendar  Calendar	Assign user to a Assign user of a Assign user of the Assign user of th	group: Users may be elect User	Users in group	a access group. To assign u	Number of records in group	le groups, use the DAG Swit steps Unique group name @ (auto-generated) site_a site_b	Group ID number @ 13 15	om. Delete group?
- View data collection status of all records  Add / Edit Records  - Create new records or edit/view existing ones  Show data collection instruments  pplications  Alerts & Notifications  Alerts & Notifications  Multi-Language Management  Calendar  Data Import Tool  Data Comparison Tool  Logging and Se Email Logging  Field Comment Log	Assign user to a Assign user to a Assign user - Su Data Access Groups Site A Site B	group: Users may be elect User P]	eassigned to any dat	a access group. To assign L to [No Assignment p genenogwarts.com nge/ duid.se (Josefine Doe), ogwarts.wz (Professor	Number of records in group 0 0	e groups, use the DAG Swii store (auto-generated) site_a site_b	Group ID number @ 13 15	om. Delete group?

2. Once all DAGs have been created, you can start assigning users. For example, by assigning Professor Snape to the DAG *Site A* he will now only have access to data generated within that DAG. Likewise, any

records he creates and data he enters will belong to *Site A* and will only be available to other users in *Site A*.

🎝 Assign user t	to a group: Users may	be assigned to any data acces	ss grou	p. To assign us	ers to <u>multiple groups</u> ,	u:	
Assign user	prof.snape@hogwarts.wz (Professor Snape) v to Site A v Assign				🗸 🔝 Assign		
Data Access Group	s	Users in group		Number of records in group	Unique group name 😏 (auto-generated)	Group ID number 🕑	Delete group?
Site A		prof.snape@hogwarts.wz (Profe Snape)	ssor	0	site_a	13	×
Site B				0	site_b	14	×
[Not assigned to a gro	pup]	hermione.granger@hogwarts.co (Hermione Granger), musip-siguz@eduid.se (Josefine * Can view ALL records	om Doe)				

3. Since Hermione is not assigned to any DAG, she has access to all records and data in the project.

## Entering/Assigning records in a DAG

<u>15-2</u>

Any records created by users who are assigned to a DAG will automatically be assigned to the same DAG.

If auto-numbering of records is enabled, REDCap will use the unique DAG ID-number followed by sequential numbering to create new record IDs. For example, Professor Snape who is in DAG *Site B* has created two records.

Demo Da	ata Access Gr	oups (DAGs) PID	2640			
I Record	Status Dashbo	ard (all records)				
Displayed be collection in: the table to collection in: collection in: Access Grou	elow is a table listing strument (and if lon open a new tab/win strument. Please no struments, you will p, you will only be a	; all existing records/respo gitudinal, for every event). dow in your browser to vie te that if your form-level u only be able to view those ble to view records that be	onses and their status for every data ). You may click any of the colored buttons in iew that record on that particular data user privileges are restricted for certain data e instruments, and if you belong to a Data selong to your group.	Legend for status ic Incomplete Incomplete Complete	<b>ons:</b> complete (no data saved)	) 3
Dashboar Displaying Displaying	d displayed: [Defa g Data Access Group g record Page 1 of	ult dashboard]	of 4 records ALL (4) ~	ustom dashboard		
+ Add new Displaying:	record	Data Access Groups	Users in group	Number of records in group	Unique group name 😡 (auto-generated)	Group ID number (
Record ID	Baseline Visit	Site A		3	site_a	13
1 2	•	Site B	prof.snape@hogwarts.wz (Pi Snape)	rofessor 2	site_b	15
						<b>▲</b>

Since *Site B*'s unique group ID-number is 15, any records Professor Snape creates will have ID numbers that start with 15 (outlined in red above).

If auto-numbering is turned off, users may enter custom record IDs as usual. REDCap will alert the user if the same record ID has already been used in a different DAG.

If a user who is not part of any DAG creates a new record, that record will also not be associated with a specific DAG. These records can only be viewed by users who are not assigned a DAG. Records created outside of DAGs follow regular sequential numbering (outlined in blue above).

These records can be assigned to a DAG at a later time. To reassign records to a DAG, follow these steps:



 Go to *Record Status Dashboard* and Displaying: Instrument status c Click on the record ID-number you want to update

 Click on Choose action for record – Assign to Data Access Group





In the pop-up window, assign to desired group and confirm.

## Assigning users to multiple DAGs (DAG Switcher)

Users can be assigned to multiple DAGs and given permission to switch in and out of those DAGs as they wish. The DAG Switcher can be found in the *DAGs* menu below the list of Data Access Groups. For example, we want to give Professor Snape access to both *Site A* and *Site B*. Go to DAG Switcher in the *DAGs* menu and tick the relevant boxes for Professor Snape to give him access to these two sites.

☆ DAG Switcher: Enable multip	ole Data A	ccess Gro	oups for u	isers Display opti	ons: O Rows are DAGs Rows are Users
Users assigned to Data Access Group switching in and out of specific DAGs user. At least two DAGs must be chec assignment, as set above or on the U Show 25 • entries	s (DAGs) ca on their ow ked for a u ser Rights p	n optionally n wheneve ser in order bage.	y be assign er they wish for them t	ed to multiple *potential* DAGs, in which they ma h. To assign a user to multiple DAGs, check the che to use the DAG Switcher. NOTE: This does not over	y be given the privilege of ckboxes below for that ride a user's <u>current</u> DAG <u>Search</u>
÷	Data Ac	cess Grou	ps		
Users	[No Assignment]	Site A	Site B		
÷	\$	÷	÷		
hermione.granger@hogwarts.com					
musip-siguz@eduid.se					
prof.snape@hogwarts.wz					
tahmar@ki.se					

Now, Professor Snape can switch in and out of two DAGs (*Site A* and *Site B*) and create records for both.

Users who are assigned to multiple DAGs have to make sure they are currently in the correct DAG before creating a new record. This can be done by checking the blue textbox at the top of the page.

	Current Data Access G	roup: [No Assignment]	🗙 Switch
<ul> <li>My Projects or Control Center</li> <li>REDCap Messenger</li> <li>Contact REDCap administrator</li> </ul>	Demo Data Acce	ess Groups (DAGs)	PID 2640
Project Home and Design	Project Home		
♠ Project Home · ■ Codebook ■ Project status: Production	The tables below pro	wide general dashboard in	nformation, such as a list of a
Data Collection		ing calendar events (ir an	, (y).
III Record Status Dashboard	La Current Users (4	)	Project Statistics
View / Edit Records	User	Expires	ecords in project

Here, a user may also switch to a different DAG or go to "no assignment" (if they were given access to the "no assignment" group).

# User Access Dashboard

The User Access Dashboard can be found under the My Projects tab if a user has been assigned user rights to at least one project.

Important	informat	ion to all ι	isers:							
On the 22nd of Ma	ay 2023 we will er	nable Multi Factor	Authenticati	on (MFA) for loggi	ing in to o	ur REDCap	o server	at Karolinska	Institut	et.
You should have re	eceived an email v	with detailed inform	nation on this,	please check you	r spam filt	er.				
For more <b>informa</b> both users with KI-	tion on MFA and ID and external u	l instructions on h isers can find guide	ow to use it, j s on how to er	lease visit the we able the function	bpage htt	ps://staff.l	ki.se/two	o-step-verifica	tionmfa	where
If you have any qu	estions related to	this, please contac	t redcap@ki.se							
Listed below are th	e REDCap project	ts to which you cur cts, visit the <mark>User A</mark>	rently have acc	ess Click the pro	ject title to	o <mark>op</mark> en the	project.	. <u>Read more</u> T	io reviev	v which
users still have acc	Drganize	Collapse All				Filter	projects	s by title	×	B
users still have acc My Projects Project Title	Drganize	Collapse All			PID	Filter	projects Fields	s by title Instruments	× Type	Status

This dashboard gives an overview of all users who have access to your projects and enables easy removal or adjustment of users if needed.

						)				
Displaying:	Projects of all statuses 🗸	Including projects with 'Practice/Just For Fun' 🗸 Reload page								
Project title:	Demo Data Access Groups (DAG	;)								
& Develop	ment all 3 users (including you)	0 users v	with API tokens	📕 Last logged activ	ity: 25/07/202	24 12:42				
User			User's Project Expiration (D/M/Y)	Last time the user accessed the project	X Delete	🕒 Expire				
musip-siguz	@eduid.se* (Josefine Doe)		_	25-07-2024 12:42	0	0	reset			
musip-siguz hermione.gi	@eduid.se* (J <u>osefine Doe)</u> anger@hogwarts.com ( <u>Hermione Grange</u>	<u>.</u> )		25-07-2024 12:42 never	0	0	reset			

For each user, you see whether they hold an API token, whether they were added to the project with an expiration date, and when they last accessed the project.

Save Reset

You can take two actions on the dashboard page:

- **Delete:** deletes the user from the project
- Expire: set an expiration date for the user's access to the project

After making changes on the dashboard, don't forget to click on "save."

# Troubleshooting

If a collaborator cannot access your project, check the following:

#### Does the person have a REDCap account?

Before a person can be added to a project, they have to create a REDCap user account; more information on how to create a REDCap user account can be found on the <u>staff portal</u>.

#### Has the person been added to the project correctly?

It is not possible to invite a person to REDCap by adding their email address to your project. To add a person to your project, follow the steps outlined in the section "How to Add Users to Your Project" above.

#### Has the person's user account been suspended?

All REDCap user accounts are automatically suspended after two years of inactivity and deleted after a further 6 months. Each user is responsible for keeping their account active by logging in regularly. If a user account has been suspended, they should email <u>redcap@ki.se</u> to get the suspension lifted. If their account has been deleted, the user must create a new account which then needs to be added to relevant projects again.

#### Was the user account added with an expiration date?

Check that the user account was either added without an expiration date or is not past its expiration date. If needed, renew the expiration date and/or add the user to your project again.

# **Tips & Best Practices**

Only enable user rights a user actually needs: Do not simply tick all options in the user rights section but consider what access a user needs. Set expiration dates for users where relevant. Make sure users are assigned appropriately and with minimal required user rights.

<u>Review the User Access Dashboard regularly:</u> Review who has access to your projects on a regular basis (e.g., every six months) and remove or adjust users as needed.

<u>Make use of user roles:</u> User roles need to only be set up once and provide a pre-determined level of access when adding new users to a project. This makes the process of adding new users easier and faster. Roles are especially useful in projects with many users and projects where the list of users changes frequently.

<u>Make use of Data Access Groups:</u> Using DAGs is recommended for, for example, multicentre studies so that users from different sites can work in REDCap without seeing other sites' data.

<u>Mark sensitive and identifiable data in your project</u>: Mark sensitive and identifiable information in your project and limit who can access and export that data.

<u>Collect sensitive information in one instrument</u>: If your project collects identifiable information but you have users who should not be able to see that kind of information, you could collect all identifiable data in one instrument and restrict users' access to that instrument in REDCap.

Have a process for when project users are leaving: Make sure REDCap access is adjusted (i.e. expired/deleted) when a team member leaves your project group. Before a user is taken off a project, make sure relevant project settings tied to their account are transferred to another user (e.g. API tokens, Automated Survey Invitations).