

User Rights

CCTS Biostatistics Core

April 2024

Note: Access to each individual REDCap project is managed by the project team, **not the REDCap administrator**. To gain access to a project, please contact someone on your team with User Rights permissions. This may include the project creator or owner or a project manager.

Introduction

Use the User Rights page to grant project access to any person with an active UIC REDCap account. Each user's rights can be finely controlled at either the individual or the group level. For example, you might invite a user to:

- Manage project setup
- Create and edit forms and surveys
- Enter, view, or download data
- Add and remove other users

If you have User Rights permissions within a specific REDCap project, you will see a link to the User Rights panel in the left menu under Applications.

If you don't see this link but think you should be able to manage user rights on a project, please contact the project's creator or another team member who can grant you this permission. **Do not** contact the REDCap administrator.

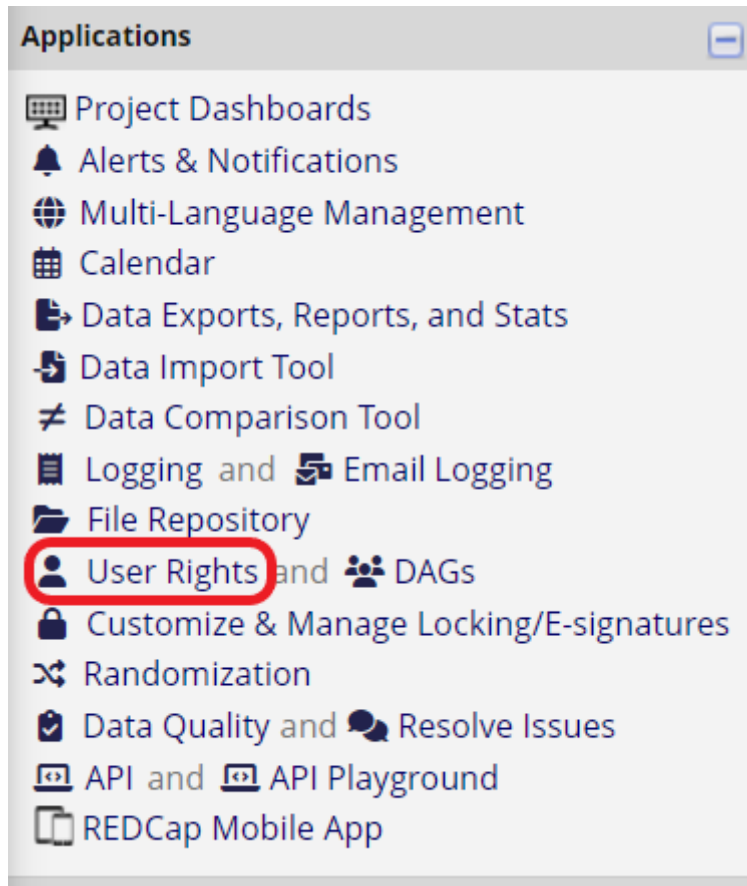


Figure 1: User Rights

Add with Custom Rights

To add an existing REDCap user to your project with custom rights, search for that user by name or REDCap username in the “Add new user” box. Click + Add with custom rights.

This page may be used for granting users access to this project and for managing the user privileges of those users. You may also create roles to which you may assign users (optional). User roles are useful when you will have several users with the same privileges because they allow you to easily add many users to a role in a much faster manner than setting their user privileges individually. Roles are also a nice way to categorize users within a project. In the box below you may add/assign users or create new roles, and the table at the bottom allows you to make modifications to any existing user or role in the project, as well as view a glimpse of their user privileges.

The screenshot shows a user management interface with a header bar containing a download icon and the text "Upload or download users, roles, and assignments" with a dropdown arrow and a help icon. Below this, there are three main sections:

- Add new users:** "Give them custom user rights or assign them to a role." This section contains a text input field, a green button labeled "+ Add with custom rights", and a radio button labeled "OR".
- Assign new user to role:** This section contains a dropdown menu for selecting a role and a green button labeled "Assign to role" with a user icon.
- Create new roles:** "Add new user roles to which users may be assigned." This section contains a text input field for "Enter new role name" and a blue button labeled "+ Create role".

At the bottom of the form, there is a small example text: "(e.g., Project Manager, Data Entry Person)".

Figure 2: Add with Custom Rights

Tip: If the user you're looking for doesn't appear in the dropdown menu, check for the following potential issues:

- Make sure you're searching by **name** or **REDCap username**. Don't try to search by email address.
- The individual must have an active UIC REDCap account.
 - To request a new account for someone, submit a request through the [REDCap service request system](#). See the [Request an Account page](#) for more information.
 - To reactivate an expired or suspended account **you sponsor**, visit the [Sponsor Dashboard](#).
 - To reactivate an expired or suspended account you don't sponsor, submit a request through the [REDCap service request system](#).

When you add a new user with custom rights, you will need to define what actions that user can perform. Carefully review each section of the popup window to ensure an appropriate level of access. Some user rights options are explained below.

Basic Privileges


Expiration Date: Set a time limit for the user's access to this project.

Project Design and Setup: Check this box if the user should be allowed to add, edit, and delete instruments and project settings.


User Rights: Indicate whether this user should be able to grant and revoke project access for other users (Full Access), view other users' access levels but not edit them (Read Only), or have no access to the user rights page.


Data Access Groups: Check this box to allow the user to create Data Access Groups and control which users belong to them.

Basic Privileges

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

Highest level privileges:

 Project Design and Setup

 User Rights No Access
 Read Only
 Full Access


 Data Access Groups

Figure 3: Basic Privileges

Use the checkboxes and multiple-choice fields to define user access to additional modules, including Alerts & Notifications, reports, the File Repository, and the REDCap Mobile App.

Other privileges:












 Alerts & Notifications	<input type="checkbox"/>
 Calendar	<input checked="" type="checkbox"/>
 Add/Edit/Organize	<input checked="" type="checkbox"/>
Reports <small>Also allows user to view ALL reports (but not necessarily all data in the reports)</small>	
 Stats & Charts	<input checked="" type="checkbox"/>
 Data Import Tool	<input type="checkbox"/>
 Data Comparison Tool	<input type="checkbox"/>
 Logging	<input type="checkbox"/>
 File Repository	<input checked="" type="checkbox"/>
 Data Quality What is Data Quality?	<input type="checkbox"/> Create & edit rules <input type="checkbox"/> Execute rules
 Data Resolution What is Data Resolution Workflow?	<input type="radio"/> No Access <input checked="" type="radio"/> View only <input type="radio"/> Open queries only <input type="radio"/> Respond only to opened queries <input type="radio"/> Open and respond to queries <input type="radio"/> Open, close, and respond to queries
 API What is the REDCap API?	<input type="checkbox"/> API Export <input type="checkbox"/> API Import/Update

Figure 4: Basic Privileges

Settings pertaining to the REDCap Mobile App:

REDCap Mobile App Allows user to collect data offline in the mobile app
[What is the REDCap Mobile App?](#)

Allow user to download data for all records to the app?

Settings pertaining to project records: [Explain these settings](#)

Create Records

Rename Records

Delete Records
 * Includes ability to delete all data on an instrument or on a repeating event.

Settings pertaining to record locking and E-signatures:

Record Locking Customization

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

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.

Figure 5: Basic Privileges

Privileges for Viewing and Exporting Data

Define whether the user can view, edit, and export data associated with each project instrument. You can limit data exports to deidentified data, meaning designated identifier and open text fields will be excluded.

Privileges for Viewing and Exporting Data							
	Data Viewing Rights			Data Export Rights			
	No Access (Hidden)	Read Only	View & Edit	No Access	De-Identified*	Remove All Identifier Fields	Full Data Set
Demographics	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Baseline Data	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Month 1 Data	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Month 2 Data	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Month 3 Data	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Completion Data	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

* De-identified means that all free-form text fields will be removed, as well as any date/time fields and Identifier fields.

Figure 6: Viewing and Exporting Data

User Roles

A named user role is a template of user rights that can be assigned to multiple individuals. For example, you might create a user role called “Project Administrator” for team members who will build and manage instruments. Another role called “Front-Line Staff” might have permission to enter data but not alter instruments or view reports.

To create a new user role, type the name in the “Enter new role name” box and click the blue + Create role button.

Upload or download users, roles, and assignments ?

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

— OR —

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

Figure 7: Create Role

Define what permissions should be available to individuals in this role, as described above.

After you have created one or more named roles, assign users using the “Assign new user to role” box.

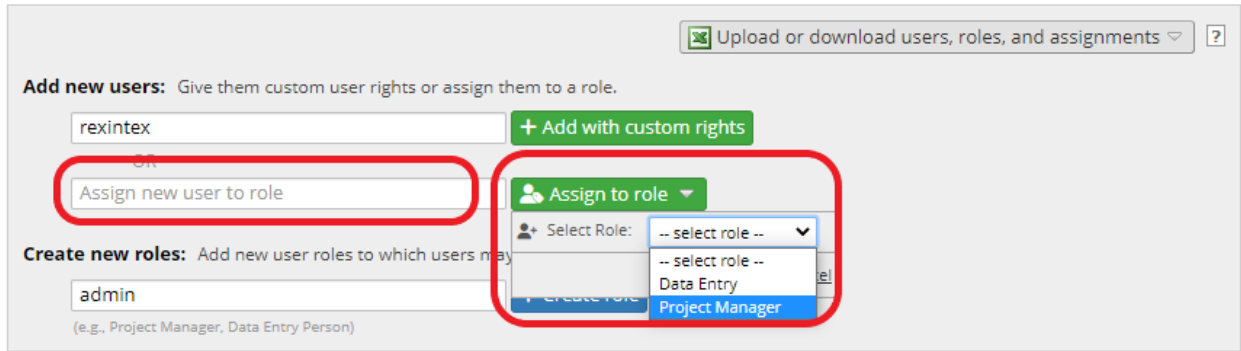


Figure 8: Assign to Role

Change User Rights

To change a user's custom user rights, click on the user's name and click `Edit user privileges` or `Assign to role`.

To remove a user from an assigned role, or to change the assigned role, click the user's name and click `Re-assign to role` or `Remove from role`.

To modify the permissions associated with a named role, click the role name.