

### *What are the user rights options?*

User rights allow you to manage user-access and user-permissions within your REDCap project.

In general, users should be given access only to the modules that they require, and no more. This is known as the principle of least privilege and acts both to increase the security of your project and to minimize visual clutter from the user's window.

This table below describes the User Rights Options available in REDCap.

To learn how to manage user rights, refer to [FAQ: USER RIGHT ADMINISTRATION](#) and [FAQ: USER ROLES](#). A role is a template of user rights.

## Frequently Asked Question (FAQ) Library

| User Right                | Description                                                                                                                                                                                                    |
|---------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Expiration Date           | This setting disables a user access on a specific date (e.g. temporary staff). <u>Note</u> : Yale NETID's obtained through a Sponsored identity will also have an expiration date.                             |
| Project Design & Setup    | User can create, edit and remove project elements including the project-type, instruments, events, and fields. Designer privilege allows changes to the structure and meta data (e.g. variable names, labels). |
| User Rights               | User can assign and change user rights, including for themselves.                                                                                                                                              |
| Data Access Group (DAG)   | User can assign others to Data Access Groups. See also <a href="#">FAQ: DATA ACCESS GROUPS</a> .                                                                                                               |
| Survey Distribution Tools | User can access survey tools (e.g. public survey link, participant link, and survey invitation logs)                                                                                                           |
| Alerts and Notifications  | User can access and set up alert and notifications                                                                                                                                                             |
| Calendar & Scheduling     | User can view calendar and schedule participants using the Calendar Module and the Scheduling Module.                                                                                                          |
| Add/Edit/Organize Reports | User can access the Report Builder which builds and saves custom reports that query the project in real-time.                                                                                                  |
| Stats & Charts            | User can access aggregate-level statistics and charts found within reports.                                                                                                                                    |
| Data Import Tool          | User can import data into project using the data import template.                                                                                                                                              |

**Basic Privileges**

📅 Expiration Date (if applicable)  (M-D-Y)

Highest level privileges:

- ☑️ Project Design and Setup
- 👤 User Rights
- 👥 Data Access Groups

Other privileges:

- 📄 Survey Distribution Tools
- 🔔 Alerts & Notifications
- 📅 Calendar & Scheduling
- 🔍 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
- 🔍 Data Quality  [What is Data Quality?](#)
  - Create & edit rules
  - Execute rules
- 🔌 API  [What is the REDCap API?](#)
  - API Export
  - API Import/Update

**FAQ: User Rights (v2.0, 07/21/23)**

## Frequently Asked Question (FAQ) Library

| User Right            | Description                                                                                                                                                                                      |
|-----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Data Comparison Tool  | User can compare records side-by-side.                                                                                                                                                           |
| Logging               | User can view the log which lists the occurrence of project-level activity, including data exports, data changes, and the creation or deletion of users.                                         |
| File Repository       | User can upload or download files in the File Repository.                                                                                                                                        |
| Data Quality          | <i>The Data Quality module is a tool for checking data characteristics across records. The Data Quality module allows users to view potentially problematic data to assist in data cleaning.</i> |
| Create and Edit Rules | User can create their own data quality rules (e.g. missing values, field validation errors, and outliers). User can also edit, delete, or reorder the rules that have already been created.      |
| Execute Rules         | User can execute data quality rules to check for data discrepancies.                                                                                                                             |
| API                   | User can access API features such as viewing API tokens, requesting API tokens, and the API playground. See also <a href="#">FAQ: API</a> .                                                      |
| API Export            | User can export data via API.                                                                                                                                                                    |
| API Import/Update     | User can import or update data via API.                                                                                                                                                          |

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## Frequently Asked Question (FAQ) Library

| User Right                   | Description                                                                                                                                                                                                                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| REDCap Mobile App            | User can add new participants by creating a record with a "Study ID". If users do not have this privilege, they will only be able to view and edit <b>existing</b> records.                                                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Allow user to collect data   | User can collect data in the offline mobile app.                                                                                                                                                                           | Settings pertaining to the REDCap Mobile App:<br><input type="checkbox"/> REDCap Mobile App <input checked="" type="checkbox"/> Allows user to collect data offline in the mobile app<br><a href="#">What is the REDCap Mobile App?</a><br>Allow user to download data for all records to the app? <input checked="" type="checkbox"/>                                                                                                                                                                                                                                                                                                                                                  |
| Allow user to download data  | User can download all data from REDCap to the mobile app.                                                                                                                                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Create Records               | User can add new participants by creating a record with a "Study ID". If users do not have this privilege, they will only be able to view and edit <b>existing</b> records.                                                | Settings pertaining to project records: <a href="#">Explain these settings</a><br><input checked="" type="checkbox"/> Create Records <input checked="" type="checkbox"/><br><input checked="" type="checkbox"/> Rename Records <input checked="" type="checkbox"/><br><input checked="" type="checkbox"/> Delete Records <input checked="" type="checkbox"/><br>* Includes ability to delete all data on an instrument or on a repeating event.                                                                                                                                                                                                                                         |
| Rename Records               | User can rename records. This includes assigning a participant a new "Study ID". All users are prevented from renaming a record to a value that already exists.                                                            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Delete Records               | Users can permanently delete records from the project. Once performed, there is no way to retrieve the data. For more information see <a href="#">FAQ: DELETE RECORD</a> .                                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Record Locking Customization | <i>Locking disables future changes to a record. Locked forms will display the time and who locked it. All fields on the form will be disabled as read-only until someone with Lock/Unlock privileges unlocks the form.</i> | Settings pertaining to record locking and E-signatures:<br><input type="checkbox"/> Record Locking Customization<br><input checked="" type="radio"/> Lock/Unlock Records (instrument level) <input type="radio"/> Disabled<br>Users with locking privileges also have access to the E-signature and Locking Mgmt page on the left-hand Applications menu. <input type="radio"/> Locking / Unlocking with E-signature authority<br><input checked="" type="radio"/> Locking / Unlocking with E-signature authority <a href="#">What is an E-signature?</a><br><input type="checkbox"/> Watch video about locking<br><input type="checkbox"/> Lock/Unlock *Entire* Records (record level) |
| Disabled                     | Users CANNOT lock or unlock records.                                                                                                                                                                                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Locking/ Unlocking           | User can lock and unlock records.                                                                                                                                                                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |

**FAQ: User Rights (v2.0, 07/21/23)**

## Frequently Asked Question (FAQ) Library

| User Right                                                   | Description                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|--------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Locking/ Unlocking with e-signature authority</b>         | User can lock and unlock records and apply their e-signature (to denote who authorized the lock).                                                                                                                                                                                                                                                                                                                                                  |
| <b>Allow locking on all forms at once for a given record</b> | User can lock all forms at once for a given record.                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>Data Viewing Rights</b>                                   | <p><i>Data Viewing Rights allow you to limit which instruments the user can access and edit. Users who have restricted data entry rights may still be able to view and access data if they are assigned data export privileges.</i></p> <p><b>Note: For projects in production, all users will automatically receive “No Access” to data viewing for any newly added instrument.</b></p> <p>Refer to <a href="#">FAQ: USER VIEW AND EXPORT</a></p> |
| <b>No Access</b>                                             | Users CANNOT open, edit, or add data.                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>Read Only</b>                                             | User can view but cannot add or edit data.                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>View &amp; Edit</b>                                       | User can view and edit data.                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>Editing Survey Responses</b>                              | User can open a respondent’s survey and make changes. Only available if the instrument is enabled as a survey.                                                                                                                                                                                                                                                                                                                                     |

|                                 | 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                    |
| Screening                       | <input type="radio"/> | <input type="radio"/>            | <input checked="" type="radio"/> |                          | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/>            | <input type="radio"/>            |
| Participant Contact Information | <input type="radio"/> | <input type="radio"/>            | <input checked="" type="radio"/> |                          | <input type="radio"/> | <input type="radio"/>            | <input checked="" type="radio"/> | <input type="radio"/>            |
| Demographics (survey)           | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/>            | <input type="checkbox"/> | <input type="radio"/> | <input type="radio"/>            | <input type="radio"/>            | <input checked="" type="radio"/> |
| Family History (survey)         | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/>            | <input type="checkbox"/> | <input type="radio"/> | <input type="radio"/>            | <input type="radio"/>            | <input checked="" type="radio"/> |

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## Frequently Asked Question (FAQ) Library

| User Right                   | Description                                                                                                                                                                                                                                                                                                      |
|------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Data Exporting Rights        | <p><i>Data Export Rights allow you to limit which instruments the user can export data from.</i></p> <p><b>Note: For projects in production, all users will automatically receive “No Access” to export rights for any newly added instrument.</b></p> <p>Refer to <a href="#">FAQ: USER VIEW AND EXPORT</a></p> |
| No Access                    | Users CANNOT export any data.                                                                                                                                                                                                                                                                                    |
| De-Identified                | Identifier, date/time, and free text fields will all be removed from the export                                                                                                                                                                                                                                  |
| Remove All Identifier Fields | Fields set as identifiers will be removed.                                                                                                                                                                                                                                                                       |
| Full Data Set                | User can export all data.                                                                                                                                                                                                                                                                                        |
| New User Notification        | If checked, the user will receive an email alerting them to their newly gained access to the project.                                                                                                                                                                                                            |