

User Rights and Roles

Limiting who has access to what information in REDCap is one of the best ways to ensure that data is protected and validity is maintained. One of the great features in REDCap is the ability to limit access to various data features, such as editing, exporting, or locking records. This can be done by assigning individual user rights, or by creating “User Roles” that have defined rights, then adding users to a role. User rights should be set according to the minimum necessary standard—limiting access to data and data privileges according to the minimum necessary for individuals to complete their assigned tasks. This document provides suggestions for creating user roles and assigning user rights to maximize data protection. These suggestions may not be appropriate for every project, nor will every project have all the roles defined.

User Rights Definitions

Following is a list of user rights with accompanying descriptions. Rights that are **bold** should be limited to select members of the research team.

Expiration – sets an expiration date for a user’s access to a project; an expiration date can be set when the user is added or by clicking in the “Expiration” column next to the user’s name on the “User Rights” page after the user is added

Project Design and Setup – allows the user the ability to change the structure of the project and enable/disable project features and modules

User Rights – gives the user the ability to assign and change rights for other users on the project

Data Access Groups – gives the user the ability to create and assign users to Data Access Groups

Data Export Tool – The data export module allows users to export data into a variety of formats (e.g. Excel, SAS, etc.). The following are the four, mutually exclusive options for export rights.

- *No access* – user is not allowed to export any data
- *De-identified* – user can only export de-identified data; this export would remove any free-form text fields, date/time fields, and other fields marked as identifiers prior to export
- *Remove all tagged identifier fields* – this export would remove any fields marked as identifiers prior to export
- *Full data set* – user can export the full data set

Reports and Report Builder – gives the user the ability to add and/or edit reports

Graphical Data View and Stats – allows the user to view graphs and statistics

Calendar – allows the user to track study progress and gives the user the ability to update calendar events

Data Import Tool – gives the user the ability to import data directly into the project, bypassing manual data entry

Data Comparison Tool – allows users to view two records side by side for comparison

Logging – allows user to view logs of all occurrences, including data exports, design changes, record history (creation, updating, and deletion), creating users, record locking, and page views

File Repository – allows user to utilize the file repository

Record Locking Customization – gives the user the ability to customize record-locking text; this is a feature used to give “meaning” to the locking action

Lock/Unlock Records – Locking data can help ensure data validity, as it limits the ability of some users to edit records after they’re been entered. The following are the three, mutually exclusive options for locking records.

- *Disabled* – user is not allowed to lock or unlock records
- *Locking/Unlocking* – user can lock/unlock records
- *Locking/Unlocking with E-signature authority* – user can lock/unlock records and authorize the locked record through their e-signature to confirm that it has been checked and is valid

Data Quality (create/edit rules) – gives the user access to data quality features, including creating and editing data quality rules

Data Quality (execute rules) – allows the user to execute existing data quality rules

Create Records – allows the user to create new records in a project

Rename Records – gives the user the ability to change the key identifier of a record (e.g. record_id)

Delete Records – gives the user the ability to delete records from a project

User Access Dashboard

Any user with user rights privileges will also have a “User Access Dashboard” that is accessible on the “My Projects” tab in REDCap. This dashboard will show a user a summary of all the projects in which they have user rights privileges, as well as who has access to each project. The dashboard should be reviewed monthly to ensure that project access is accurate.

Suggested User Roles

Principal Investigator – primary individual in charge of and responsible for the proper conduct of a research project; this individual must be eligible to be PI as set forth by the [Campus Administrative Manual](#)

Project Administrator – person who fulfills day-to-day responsibilities within and pertaining to the project and the Illinois REDCap system

Data Entry – personnel only responsible for the creation of records and entry of data

Data Monitor – person responsible for monitoring the implementation, conduct, and data quality of the research project

Statistician – person responsible for analyzing collected data or advising on analysis

Suggested User Rights for User Roles

	<i>Principal Investigator</i>	<i>Project Administrator</i>	<i>Data Entry</i>	<i>Data Monitor</i>	<i>Statistician</i>
<i>Project Design and Setup</i>	X	X			
<i>User Rights</i>		X			
<i>Data Access Groups</i>	X	X			
<i>Data Export Tool</i>	De-identified	De-identified	No Access	No Access	De-identified
<i>Reports and Report Builder</i>	X	X		X	X
<i>Graphical Data View and Stats</i>	X	X		X	X
<i>Calendar</i>	X	X		X	
<i>Data Import Tool</i>		X			
<i>Data Comparison Tool</i>		X		X	
<i>Logging</i>	X	X		X	
<i>File Repository</i>	X	X		X	
<i>Record Locking Customization</i>		X			
<i>Lock/Unlock Records</i>	Locking/ unlocking with E-signature	Locking/ unlocking	Disabled	Disabled	Disabled
<i>Data Quality (create/edit rules)</i>		X		X	
<i>Data Quality (execute rules)</i>	X	X		X	X
<i>Create Records</i>		X	X		
<i>Rename Records</i>		X			
<i>Delete Records</i>		X			