

Transcript of: Data Access Groups

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Audio is in normal text below. Timestamps are in bold to assist in finding specific topics.

(0:00)

REDCap has built-in features for controlling user access. The User Rights tool controls access to a project's data collection instruments and applications. The applications video illustrates this process. An additional, optional feature called Data Access Groups controls which records each user can access. A user assigned to a data access group, or DAG, can only access records assigned to their group. DAG users are blinded to records and data entered outside their group.

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Data access groups are particularly useful in multi-site projects. Usually, each site must be restricted from viewing other sites' records.

The data access groups page is where groups are created and users are assigned. There is no limit to the number of data access groups. Group names are short and descriptive.

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Only existing project users can be assigned to data access groups. Users must first be added to a project as usual, through the User Rights page. Those usernames are then displayed on the data access groups page.

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Any user not assigned to a data access group has global access. This type of unassigned user can access all records in the project.

The DAG page lists each group, the users currently assigned, and the number of records currently assigned to each group. This table also includes the unique group name, which is used during data imports and record assignment.

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Groups can be deleted, modified, or added at any time, even in production mode. Users can be removed from a data access group or re-assigned. This is done either on the DAG page or on the User Rights page. It is critical to create data access groups and assign users to them before data collection begins. This assignment is the key to controlling record access.

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When a data access group user creates a record, it is automatically assigned to their group. Here, we are logged in as a DAG user. A unique DAG code is pre-appended to the record number. This code is automatically assigned by REDCap. It signifies the current DAG of this user at the time this record is created.

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Let's add a few more records with this user. Again, the same code is automatically added to the beginning of every new record.

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Now, let's login as a different DAG user. Notice that this DAG has no records yet, so this user has no records to open. The previous records are inaccessible because they were created in a different data access group. Let's add a few records in this second DAG. A unique code is again pre-appended to the beginning of the record number. Every user in this data access group will automatically have their records linked to this code.

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While we're here, let's create a quick report. Reports are global, meaning that all users can run the same reports, regardless of data access group assignment. But reports and exports include only the data accessible to the user running them. So this user can only see data from their group's records in this report.

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Now, let's log in as the first DAG user again and run the same report. Notice that none of the second user's records appear. Each user can only access the data assigned to their group.

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Finally, let's log in as a global user. We are now logged in as someone not assigned to any data access group. In this reviewer role, we can see all data across all data access groups. All records can be accessed.

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A global user can even create records. Such record numbers are not assigned to any data access group, so they do not receive any unique code. For this reason, it is critical to finalize data access group assignments before data collection begins. When DAG users create records, they are automatically assigned the unique code. When global users create records, they are not assigned to any data access group. These records are accessible only to users not in a DAG.

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If this user is now assigned to a DAG, they would lose access to this record. A global user can manually assign records to a data access group. This is done by opening any instrument for the given record, choosing the new assignment, and saving the page.

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This method can also be used to re-assign records. Re-assigning records can be confusing though. The record numbers are not automatically updated to reflect their new data access group. The record must be re-named manually. The data access groups page illustrates the number of records in each DAG. To see more detail, an export must be done. The export will automatically list each record's data access group.