

Transcript of: Data Resolution Workflow

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

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REDCap has a feature called the Data Resolution Workflow which provides a formal process for managing and documenting the resolution of issues in your REDCap data. It's often called Data Queries in clinical trials and studies. The general process is this: if there's an issue with a data value in your project, you could open a query, and then someone will need to respond to the query to investigate the issue, after which the issue will then be resolved. That's generally how the Data Resolution Workflow works with regard to opening and closing data queries. But we'll take a quick look to see how it looks in REDCap.

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So generally you'll be in your REDCap project on the Project Setup page, and you'll need to enable the Data Resolution Workflow here. If you open the Additional Customizations popup, you'll see it listed right here. By default, the Field Comment Log will be enabled. That's the default in all projects. But you can enable the Data Resolution Workflow right here. And there's information listed here to let you know what the difference is between the Field Comment Log and Data Resolution Workflow. But this is where you're going to enable it for your project.

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Once you've enabled it, you'll get a nice set of instructions here telling you where to go to next and giving you a little outline of the process of how you'll use the Data Resolution Workflow. The first of which, you'll go to the User Rights page to set up your user privileges.

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Here, you'll add all your users to your project, and you'll see a new section here called Data Resolution Workflow that allows you to set the rights level of your users for this specific module. By default, everyone will be given "No Access", but you can also give them "View only" access so they can view data queries but they

can't actually contribute or open them. "Respond only", they can only respond to data queries, they cannot open them. And then the maximum which is the "Open, closing, and responding to data queries." So depending on their role in the project, that will determine which user right that they get here.

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But let's look at the first place where this will show up, which is on the data entry form. So first you'll see that you get these nice little gray balloons right here that you can click to open the Data Resolution Workflow popup. And what it's going to list is the options to either verify a value or to open a query. Verifying a value just means certifying that it's a certified official value – giving your stamp of approval that it is verified. But please note that if you do change a verified value that it will automatically de-verify it right here. And you can click this icon, you see it's changed to a red icon, you can now open it up right here and it'll list the data changes as well as the fact it was de-verified automatically. You can also de-verify it manually if you want to.

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But essentially what you can do on any given data point is that you can open a formal data query. That's sort of the flip side of the data verification. So this point may have something wrong with it, maybe the value is incorrect or it's thought that it's incorrect, I can open a query and even assign it to a user if I want to right here. Just leave a little comment right there, and then you notice the value changes. The icon changes right here and then a person that has the ability to respond to the query can actually come through here and leave a response as such and even upload a document. So they would have the ability to do that and then a person maybe with the ability to close the query can come here and then close the query.

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And you can view the whole thread of what happened right here in this Data Resolution Workflow popup, listing the entire process of what happened, who left the comment, and when. So that's how it would be done right there on that page.

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Of course another useful page will be the Resolve Issues page, of which it gives you a nice little dashboard for viewing all of your open and unresolved issues. You can even look at data that has been de-verified or data queries that have already been closed. But it provides a nice injection point and to-do list for trying to find and resolve your issues in your project, as well as a nice metrics page that gives you some general statistics and some nice charts about the resolution of data in your project right here. So overall that's the Data Resolution Workflow in REDCap and provides a nice way to manage and document the resolution of data issues in your project.