

Transcript of: Locking Records

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

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Record locking freezes data, ensuring that users don't accidentally modify it without authorization. This controls data entry and is commonly used to prepare for statistical analysis or to archive final datasets.

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An icon identifies which instruments have been locked for this record. Only instruments are locked. It is not possible to lock individual fields. The project status and form status do not affect locking. This feature can be used at any time, with any records.

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Locking permissions are controlled on the User Rights page. Unauthorized users cannot modify a locked instrument.

In each User Rights account, the locking section has three levels. Users may have no rights, basic rights, or advanced rights. Advanced rights allow a user to both lock and apply an e-signature to each instrument. Refer to the built-in help resources for more information about e-signatures.

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The basic rights option is the most commonly used access. Another commonly used feature is locking all of a record's instruments at once. With this option enabled, notice how quickly and easily multiple instruments are locked and unlocked.

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The person who locked a record does not have to be the same one to unlock it. Any user having the needed rights can use this feature. There is no limit to the number of times a record is locked or unlocked, even in production mode. Unlocking allows data to be changed as usual.