

## REDCap – How to add a User to a project

- Navigate to the User Rights hyperlink, located on the left side of the project screen. This hyperlink will open the User Rights tab.
- In the ‘Add with Customer Rights’ text box, enter the username of the individual you want to add to the project.

Wake Health Employees: For example, if the individuals email is: [jdoe@wakehealth.edu](mailto:jdoe@wakehealth.edu), you will enter **jdoe** into the text box. Please do not enter the full email address.

External Users (non-Wake Health Employees): Enter the username provided by the REDCap Administrator when the non-Wake Health individual’s profile was created.

- Click ‘Add with Custom Rights.’

**Data Collection** [Edit instruments](#)

- Manage Survey Participants**  
- Get a public survey link or build a participant list for inviting respondents
- Record Status Dashboard**  
- View data collection status of all records
- Add / Edit Records**  
- Create new records or edit/view existing ones

Data Collection Instruments:  
Demographics  
Patient Data  
Ctsi Service Request Form

**Applications**

- Calendar
- Data Exports, Reports, and Stats
- Data Import Tool
- Data Comparison Tool
- Logging
- Field Comment Log
- File Repository
- User Rights** and DAGs

Project Setup **User Rights** Data Access Groups

This page may be used for granting users access to this project and for managing the user privileges of those users. You may also create roles to which you may assign users (optional). User roles are useful when you will have several users with the same privileges because they allow you to easily add many users to a role in a much faster manner than setting their user privileges individually. Roles are also a nice way to categorize users within a project. In the box below you may add/assign users or create new roles, and the table at the bottom allows you to make modifications to any existing user or role in the project, as well as view a glimpse of their user privileges.

**Add new users:** Give them custom user rights or assign them to a role.

**Create new roles:** Add new user roles to which users may be assigned.

(e.g., Project Manager, Data Entry Person)

- Note: If the user has not logged into REDCap previously, their full name will not appear when you are typing in their username. It is okay to continue typing in their username and then selecting their specific rights. Once the new user logs into REDCap, the project will appear on their My Projects list.
- An ‘Adding New User’ popup box will appear. Designate the appropriate rights for the individual. Click ‘Add User’ when completed.

You may set the rights for the user below by checking the boxes next to the application tools to which you wish to grant them access. You may also grant them or deny them access to individual data collection instruments, if so desired. To save your selections, click the "Add user" button at the bottom of the page.

Adding new user " **jdoe** "

**Basic Rights**

Expiration Date  (M/D/Y)  
*(if applicable)*

---

**Highest level privileges:**

- Project Design and Setup
- User Rights
- Data Access Groups

---

**Privileges for data exports (including PDFs and API exports), reports, and stats:**

- Data Exports  No Access  
 De-Identified\*  
 Remove all tagged Identifier fields  
 Full Data Set  
\* De-identified means that all free-form text fields will be removed, as well as any date/time fields and Identifier fields.
- Add / Edit Reports   
Also allows user to view ALL reports (but not necessarily all data in the reports)
- Stats & Charts

---

**Other privileges:**

- Manage Survey Participants
- Calendar
- Data Import Tool

**Data Entry Rights**

*NOTE: The data entry rights \*only\* pertain to a user's ability to view or edit data on a web page in REDCap (e.g., data entry forms, reports). It has no effect on data imports or data exports.*

	No Access	Read Only	View & Edit	Edit survey responses
Demographics (survey)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>
Patient Data (survey)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>
Ctsi Service Request Form	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	

**New User Notification**

Notify user of their project access via email?

- If the user has logged into REDCap before, you will have the option to send them an email, notifying them of their project access. If they have not yet logged into REDCap, you will not see this option
- The new user will appear in the Username list on the User Rights tab. A summary of their access will appear as well.

Role name <small>(click role name to edit role)</small>	Username or users assigned to a role <small>(click username to edit or assign to role)</small>	Expiration <small>(click expiration to edit)</small>	Data Access Group <small>(click DAG to assign user)</small>	D
--	---	---	--	---