Project Level User Management

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User Management

Overview

Study teams are responsible for adding and removing users to and from their project & managing their permissions.

- User permissions referred to as rights or privileges.
- When assigning privileges we recommend *Principle of Least Privilege,* which means assign each user the minimum permissions necessary to fulfill their role.
- **Training is only required for personnel requesting and building projects.** Training is recommended for personnel managing projects. There is not a general orientation to REDCap or training requirement for other users.
- Users can be added and removed from the project throughout the project's lifecycle (during development and production). This includes requesting accounts for external users.

User Management Application (module)

- The *User Rights* module is project application for user management.
- Link to the User Rights module is the the left nav and *Project Setup tab* of every project.

Who Can Add & Remove Users at the Project Level

- Any user with access to the *User Rights* module.
- The personnel who requested the project be created in REDCap is automatically added to the project with permission to the User Rights module.

How to Add Users

There are two ways to add a user to your project. They are NOT mutually exclusive. You can use both approaches in the same project.

1. Add an individual user to your project and set their rights.
2. Create a role, set the rights for the role, and add users to the role.

OHSU Users

- Add OHSU personnel to your project with their valid OHSU username only whether or not it appears in the drop-down list.
  - The drop-down list represents potential matches with users who have previously logged into REDCap and confirmed their identity.
  - If the OHSU personnel you are trying to add to your project does not appear in the drop-down, it means they have never logged into REDCap.
    - REDCap cannot send emails to a user until they have logged into the system and set up their account.
    - Communicate to the personnel they have been added to your project will need to login into REDCap to access it.
- Never add OHSU users with their email address.

Non-OHSU Users

For personnel external to OHSU, the project team will first need to request a REDCap account be created before they can add that personnel to their REDCap project.

- There is link in the yellow box on the *User Rights* page of every project to *Request External Account for REDCap*.
  - External account request form **https://octri.ohsu.edu/redcap/surveys/?s=9H9F84DMNL**.
- Review **external user operations** page for more details about charges, the request process and managing accounts for external users.

Instruction Notes

- Click on the *User Rights* link in the left nav menu or *Project Setup* tab.
- Move your cursor to *Add New User text box* or *Assign New User text box.*
    - OHSU Users
        - Enter **OHSU personnel's username** whether or not the personnel's username appears in the drop-down list that is created as you start typing.
    - Non-OHSU Users
        - Enter the person's username that was emailed to you when you were notified the external account was created.
        - This username will appear in the drop-down list that is created as you start typing.
- Click on the corresponding button *Add with custom rights* or *Assign to role*.
- For *Adding users with custom rights*
    - Assign the user's rights in the pop-up modal window.
    - Click the *Save* button.
- For *Assigning users to a role*
    - The role must be created first.
    - Select the role from the *Assign to role* button drop-down list.

How to Edit User Permissions

- Click on the *User Rights* link in the left nav menu or *Project Setup* tab.
- In the table of users
    - For a user with custom rights, click on the user's username
        - Click on the *Edit privileges* button.
    - For edit rights assigned to a role, click on the name of the role.
- In the pop-up dialogue:
    - Edit the rights.
    - Click the *Save* button.

How to Remove Users

- Click on the *User Rights* link in the left nav menu or *Project Setup* tab.
- In the table of users, click on the user's username.
- In the pop-up dialogue:
    - For a user assigned to a role, click on *Remove from role.*
    - For a user with custom rights and not assigned to a role, click on the *Edit user privileges* button.
- In the pop-up window, click on the *Remove user* button at the bottom of the window.