REDCap @ Yale

Frequently Asked Question (FAQ) Library

What are roles? How do I use them?

A role is simply a template of user rights. To learn more about user rights, refer to **FAQ: USER RIGHTS**.

You may name and define project-level user roles (e.g. *Data Entry, Principal Investigator, Statistician*), then assign users to the appropriate role. This feature allows you to quickly and consistently designate user privileges by their specific role in the project.

This FAQ will explain how to assign and manage roles on your project. This includes how to: (1.) create a role, (2.) add a user to a role, and (3.) change a user role.

To **create** a new role:

1. Enter a title for the role under '**Create new roles**', then click '**Create role.**'
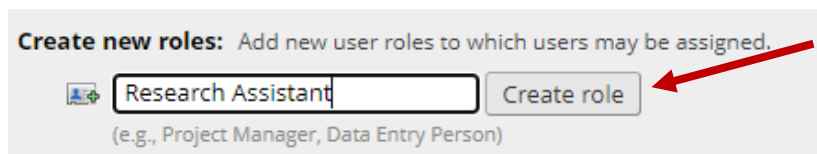
2. Configure the rights associated with the role. Once finished, click '**Create Role**' at the bottom right corner of the window.

To **add a user** to a role:

1. Enter the user's name or username into the "**Assign new user**" text box, click '**Assign to role**' and select the role to which the user should be assigned.
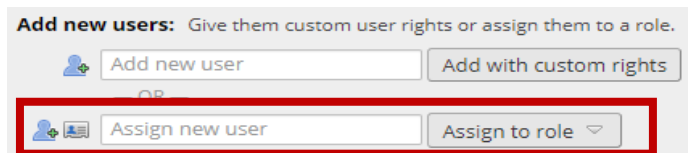
To **change a user** role:

1. You can change a user's role by clicking on the user's name, then clicking Assign to role and then selecting the new role.

Role name (click role name to edit role)	Username or users assigned to a role (click username to edit or assign to role)	Expiration (click expiration to edit)	Project Design and Setup	User Rights	Data Access Groups	Data Export Tool	Reports & Report Builder	Graphical Data View & Stats	Survey Distribution Tools	Calendar	Data Import Tool
—	(Janet Miceli)	never	✔	✔	✖	Full Data Set	✔	✔	✔	✔	✖
—	(Mary Geda)	ver	✖	✖	✖	De-Identified	✔	✔	✔	✔	✖
—	(Sui Tsang)	ver	✔	✔	✔	Full Data Set	✔	✔	✔	✔	✔
Data entry	[No users assigned]		✖	✖	✖	De-Identified	✔	✔	✔	✔	✖