Frequently Asked Question (FAQ) Library

## *How do I set up an alert or notification?*

The **Alerts & Notifications** feature allows you to construct alerts and send customized email notifications to one or more recipients. Unlike the **Automated Survey Invitation (ASI)**, this allows for an unlimited number of alerts on survey <u>and</u> data entry forms and provides flexibility with conditional logic. To learn more, refer to **FAQ: AUTOMATIC SURVEY INVITATION**.

This FAQ will explain how to use the **Alerts & Notifications** including how to (1.) access the feature, (2.) build the alert and notification, and (3.) view and manage alerts and notifications.

This feature is available to users that have '*Project Design and Setup*' privileges. See also **FAQ: USER RIGHTS.**

<u>To access this feature</u>:

1. Select **Alerts & Notifications** in the Applications menu on the left-hand navigation bar.
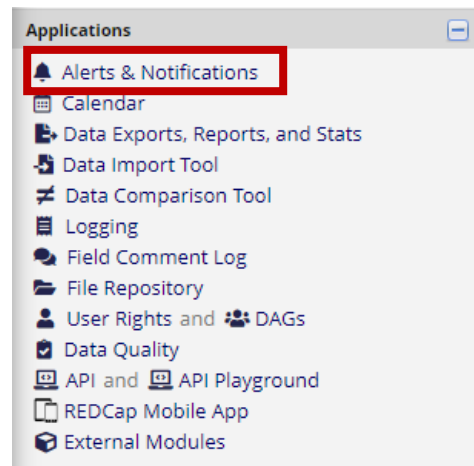
2. Click '**Add New Alert'** and create a title.

<u>To build an **Alert & Notification**</u>, you will:

      STEP 1: Define how the alert is triggered

      STEP 2: Determine when and how frequently notifications should be sent

      STEP 3: Specify the sender, recipient(s), content, and appearance of the notification.

Frequently Asked Question (FAQ) Library

1. **STEP 1**: Define the alert criteria. Alerts can be triggered when a form/survey is saved, conditional logic, or both.

> **Pro Tip**: If you are using conditional logic, you will need to know the criteria and the corresponding variable name(s). You may want to have your Codebook open to create the logic. If your condition is dependent upon a multiple-choice variable, you need the numeric code which corresponds with the response item. Refer to the built-in '**HELP & FAQ**' **available in your REDCap project** for examples of conditional logic.

a. If the condition for triggering the alert is when **a record is saved**, your choices will include:

b. If the condition for triggering the alert is when **a record is saved with conditional logic**, your choices will include:

If you choose to '**Ensure logic is still true before sending notification?**', REDCap will verify the conditional logic is met in the time that elapsed from the initial triggering event and the scheduled notification. This may be useful if there is the potential for alert triggers to change, especially when longer periods of time have elapsed.

FAQ: Alerts & Notifications (v2.0, 01/16/24)	
Page 2 of 6	*Tags: Features-Advanced, Alerts and Notifications*

c. If the condition for triggering the alert is based on **data import or data entry**, your choices will include:

2. **STEP 2**: Schedule the alert. This includes when and how frequently.
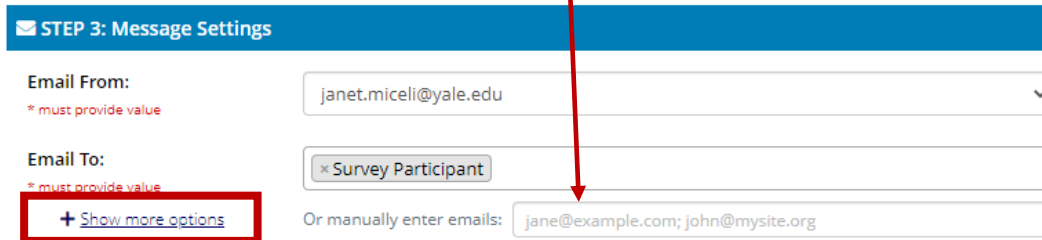
3. **STEP 3**: Create the notification including the sender, recipient(s), content, functionality and appearance. To learn about REDCap's secure options for outgoing emails, refer to *FAQ: Protected Email Mode*.

   a. **Email From**: The 'sender' must be a user on the project.

b. **Email To**: This can be survey participants, an email address captured in a field on the project or a user on the project. If you wish the alert to be sent to someone who is <u>not</u> on the project, manually type the email address in the box '**Or manually enter emails**'.
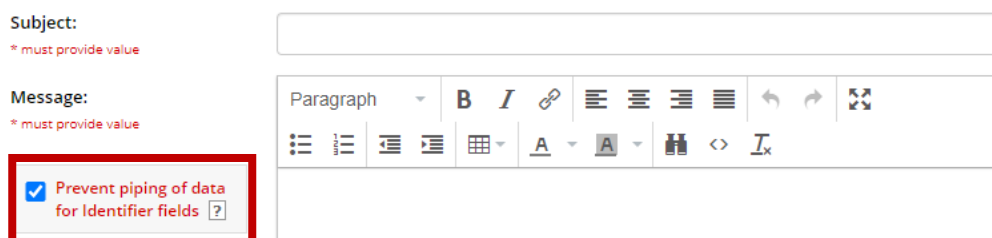
STEP 3: Message Settings

Email From: * must provide value	janet.miceli@yale.edu
Email To: * must provide value **+ Show more options**	×Survey Participant Or manually enter emails: jane@example.com; john@mysite.org

Clicking on **+Show more Options** will allow you to cc' or bcc' email recipients.

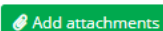|	
Email to send email-failure errors:	

Pro Tip: If you are attaching a file to your alert, the feature '**Email to send email-failure errors**' is a helpful safeguard. If the recipient's email client rejects your message (e.g. file size is too big), then the person designated in this field will be notified and can take corrective measures.

c. **Subject and Message**: To compose your email, create the subject line and message. You can add attachments. You can also incorporate piping (See also **FAQ: PIPING**) and smart variables. Click the **[⚡] Smart Variables** button in REDCap to see a full list of smart variables and how to use them.

Subject: * must provide value	
Message: * must provide value	Paragraph ▼ B I 🔗 ≡ ≡ ≡ ≡ ↶ ↷ ⤢ ☰ ☰ ☷ ☷ ⊞▼ A▼ A▼ 🔍 <> Ī
☑ Prevent piping of data for Identifier fields ?	

Pro Tip: The box '**Prevent piping of data for identifier fields**' is automatically checked. Any field tagged as an '**identifier**' field in REDCap (e.g. [date_of_birth]) will be replaced with [*DATA REMOVED*].

This is a preventative measure. To ensure security, this box should **NOT** be unchecked because the email is not encrypted.
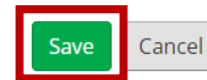
🔗 Add attachments

d.   **Optional**: You can create an expiration date (e.g. return an evaluation within a deadline). Any alert scheduled after the specified date will not be released.

e.   It is important that you test alerts to ensure they function as intended. Once you have completed testing your alert, click "**Save**" to activate your alert.
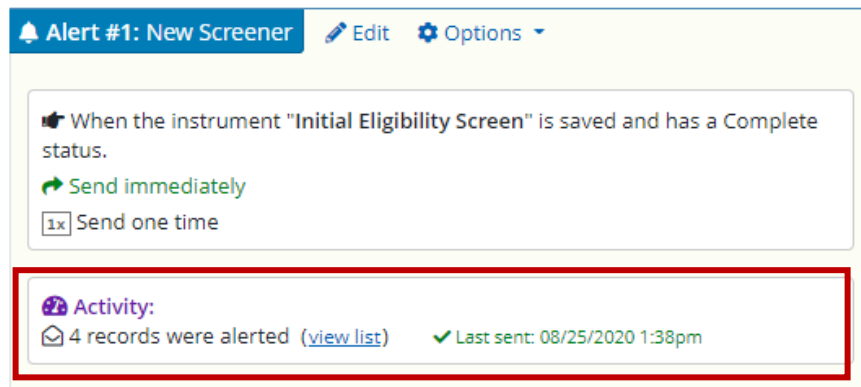

To view and manage alerts and notifications:

The **Alerts & Notification page** allows you review alerts and notification logs as well as deactivate, copy, and edit.
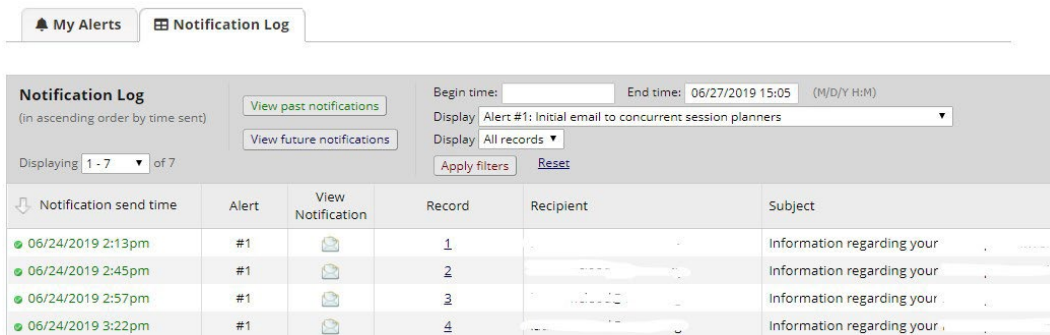
1.   **Alert Activity**: This contains a brief synopsis of your alerts including how many alerts have been released, when they were last sent, and which records were affected.

   For example:

2.   **Notification Log:** This contains a detailed listing of activity.

   For example:

FAQ: Alerts & Notifications (v2.0, 01/16/24)	
Page 5 of 6	*Tags: Features-Advanced, Alerts and Notifications*

3. **Editing an Alert:** To edit an alert, locate the existing alert and click on the Edit icon.

4. **Copying an Alert**: The copying feature is useful when you need to create a new alert that involves a small change to an existing alert. To copy, locate the existing alert and click on the Options button.

5. **Deactivating Alert:** To manually deactivate an alert, locate the alert, select the Options button, and click on the Deactivate alert option.

✎ Edit ⚙ Options ▼

📋 Copy alert
✖ Deactivate alert