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 and 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.

To access this feature:

1. Select Alerts & Notifications in the Applications menu on the left-hand navigation bar.

2. Click ‘Add New Alert’ and create a title.

To build an Alert & Notification, 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.
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:

   ```
   **STEP 1: Triggering the Alert**
   
   How will this alert be triggered? 
   - When a record is saved on a specific form/survey
   - When a record is saved on a specific form/survey with conditional logic
   - Using conditional logic during a data import or data entry
   
   Trigger the alert...
   when [choose an instrument/survey] is saved with any form status
   (excludes data imports)
   
   * The alert will not be re-triggered if the form/survey is saved again, unless it is set to send “Every time” in Step 2 below.
   ```

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

   ```
   **STEP 1: Triggering the Alert**
   
   How will this alert be triggered? 
   - When a record is saved on a specific form/survey
   - When a record is saved on a specific form/survey with conditional logic
   - Using conditional logic during a data import or data entry
   
   Trigger the alert...
   when [choose an instrument/survey] is saved with any form status
   (excludes data imports)
   
   while the following logic is true:
   
   (e.g. (enrollment_arm_1) >= 30 and (enrollment_arm_1) (sex = "M")
   
   [ ] Ensure logic is still true before sending notification?
   ```

   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.
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.
   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 not on the project, manually type the email address in the box ‘**Or manually enter emails**’.

![Email To](image)

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

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**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.

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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 and Message](image)

**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.
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.

![Alert expiration date input field]

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.

![Save button]

### To view and manage alerts and notifications:

The **Alerts & Notification page** allows you to 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:

   ![Alert activity example]

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

   For example:

   ![Notification log example]
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.