



# REDCAP UPGRADE 16/9

## 9.8.0

### Project life cycle changes

- **Change:**The "Archived" project status has been removed and converted into a built-in Project Folder named "My Hidden Projects", as now seen at the bottom of each user's My Projects page. If users wish to hide any projects from their My Projects list, they may click the Organize button on that page and place the projects into that new Project Folder. **NOTE:**Any already-archived projects will be automatically placed there and will have their project status set as "Analysis/Cleanup" to match the projects' general behavior prior to the upgrade.
- **Change:**The "Inactive" project status has been renamed to "Analysis/Cleanup" status to help reinforce that cleaning and analyzing the data is the next logical step after data collection in Production status.
- **New feature:**Projects that are in "Analysis/Cleanup" status can now optionally have their project data set as "Locked/Read-only" or "Editable" (see the top of the Project Setup or Project Home page). This will give users more control to prevent data collection from happening while in this project status.
- **Change:** New records can no longer be created while in "Analysis/Cleanup" status. If users wish to create records, the project must be moved back to Production status.
- **New feature:** Mark a project as "Completed": If users are finished with a project and wish to make it completely inaccessible, they may mark the project as Completed. Doing so will take it offline and remove it from everyone's project list, after which it can only be seen again by clicking the Show Completed Projects link at the bottom of the My Projects page. Once marked as Completed, no one in the project (except for REDCap administrators) can access the project, and only administrators may undo the Completion and return it back to an accessible state for all project users. Marking a project as Completed is typically only done when users are sure that no one needs to access the project anymore, and they want to ensure that the project and its data remain intact for a certain amount of time.

## 9.9.0

### New feature: DAG Switcher

Users assigned to Data Access Groups (DAGs) can optionally be assigned to multiple \*potential\* DAGs, in which they may be given the privilege of switching in and out of specific DAGs on their own whenever they wish.

When assigned to multiple DAGs, the user will see a blue banner at the top of every project page, which will present them with the option to switch to another DAG. NOTE: Users may not move themselves into another DAG unless someone with rights to this page has explicitly granted them privileges to be in multiple DAGs.

To assign a user to multiple DAGs, navigate to the Data Access Groups page in a project where you will see the DAG Switcher near the bottom of the page. Then follow the directions provided there. The DAG Switcher feature is completely optional and can be used in any project that has Data Access Groups.

NOTE: The DAG Switcher feature does not override a user's current DAG assignment, as set on the Data Access Groups page or on the User Rights page.

This feature is the result of integrating the “DAG Switcher” external module that was built by Luke Stevens. We thank him for his contribution and for agreeing to let us integrate this useful module into REDCap. NOTE: Because the “DAG Switcher” external module is not compatible with this integrated functionality in v9.9.0, when upgrading REDCap to 9.9.0 or higher, if the “DAG Switcher” external module is already installed and enabled on your REDCap system, it will be automatically disabled at the system level during the upgrade process to prevent a conflict.

## 9.9.2

### Changes for long-standing quirks with calc fields and branching logic

Change: In previous versions, calculated fields could only utilize either numeric fields or date/datetime fields in the calculation. Now non-numeric fields may be used, most notably inside IF statements. For example, if ([field I] = "A", 0, 99).

## 9.10.0

### **New feature: Record-level locking feature**

This feature allows users to lock an entire record (as opposed to locking individual instruments) so that none of the record's data can ever be modified unless someone with record-level locking/unlocking privileges goes and unlocks the record again.

The old "lock all forms for all events" feature has been changed into this new record-level locking feature, which is distinguishable from the existing instrument-level locking feature. Now the instrument-level locking can only be used while on a data entry form (using the Locking checkbox at the bottom of the form). Whereas the record-level locking feature is available as an option on the Record Home Page and on the project's left-hand menu after a record has been selected.

While records have always been able to be locked (i.e., made read-only) for individual data collection instruments in a project, you may now easily lock an ENTIRE record so that no data in the record can ever be modified while it is locked.

**WHAT HAS CHANGED?** It is important to note that the old user privilege "Lock all forms" has now been converted into the new record-level locking feature, which works completely independently from instrument-level locking (i.e., the checkbox at the bottom of data entry forms). Instead of that particular user privilege allowing you to lock all forms individually (which was the previous behavior), it will now serve in a slightly different capacity as the record-level locking user privilege to lock an entire record fully.

**HOW TO USE IT:** You may lock an entire record via the "choose action for record" drop-down on the Record Home Page or by clicking the "Lock Entire Record" link on the project's left-hand menu when viewing a record. Note: Since the record locking and instrument locking are completely separate features, they both may be used together in a project, if you wish. However, please note that since record locking is a higher-level locking than instrument locking, an entire record may be locked or unlocked while one or more instruments are currently locked, but an instrument cannot be locked or unlocked while the entire record is locked.

## 10.0

### New feature: Field Embedding

Field Embedding is the ultimate way to customize surveys and data collection instruments to make them look exactly how you want. Field Embedding is a Shazam-like feature that allows you to reposition field elements on a survey page or data entry form so that they get embedded in a new location on that same page. Embedding fields gives users greater control over the look and feel of your instrument. Users may place fields in a grid/table for a more compact user-friendly page, or they can position fields close together in a group if they are related.

To use Field Embedding, users simply need to place the REDCap variable name of a field inside braces/curly brackets - e.g., {date\_of\_birth} - and place it in the Field Label, Field Note, Section Header, or Choice Label of any other field on that same instrument. Field embedding will not work across instruments but only on the current instrument/survey being viewed. If on a multi-page survey, then the embedded field must be on the same survey page as its host field.

No action tags or custom HTML is required to use Field Embedding. Users can simply use the rich text editor in the Online Designer to design their layout and then place the field variables inside that layout. The layout does not have to be a table/grid (although tables are common for this), and fields can be embedded inside *\*any\** field type (not just Descriptive fields)

## 10.1.1

**New feature:** Select and modify multiple fields together on the Online Designer - Users may select multiple fields on the Online Designer by holding the Ctrl, Shift, or Cmd key on their keyboard while clicking on the field in the table, which will reveal the options to Move, Copy, or Delete all the selected fields. To make users aware of this feature, a floating note now appears near the right side of the page in the Online Designer with instructions on how to use this.

## 10.2.0

### **New feature: Stealth Queue**

New “Keep the Survey Queue hidden from participants?” setting in the “Set up Survey Queue” dialog on the Online Designer

This setting will keep the Survey Queue table hidden from participants, and will force Auto Start to be enabled for all queue-activated surveys. This is useful if users wish to use the Survey Queue to automatically guide survey participants to the next survey without displaying the queue of surveys.

## 10.3.0

**New feature:** Added "Language of text to be spoken" for the "Text-To-Speech" survey functionality, which is available on the Survey Settings page. For several years, REDCap has had a Text-to-Speech feature for surveys that, when enabled, allows questions and other text on survey pages to be converted into natural-sounding audio for the participant to hear. Up until now, it supported English only, but now REDCap users may utilize the Text-to-Speech feature in a variety of non-English languages and voices, assuming that the survey text is in a non-English language. This includes Arabic, Brazilian Portuguese, English (UK and US), French, German, Italian, Japanese, and Spanish (Castilian, Latin American, and North American).

**New feature:** Users may re-evaluate some or all Automated Survey Invitations for all records in a project. If an ASI has been modified after data has already been entered in the project, users may click the "Re-evaluate Auto Invitations" button in the Online Designer, which will re-evaluate selected ASIs for all records to ensure that invitations get properly sent or scheduled based on the new conditions of the ASI (otherwise they could only be triggered if each individual record had data modified). If a user modifies the conditional logic of an ASI, it will recommend that they utilize the "Re-evaluate Auto Invitations" functionality. If an ASI has the "Ensure logic is still true..." option checked, then it is possible during this process that some already-scheduled invitations might get removed (and thus would no longer be scheduled) based on the new conditions.

**New feature:** Users may re-evaluate some or all Alerts & Notifications for all records in a project. If an alert has been modified after data has already been entered in the project, users may click the "Re-evaluate Alerts" button on the Alerts & Notifications page, which will re-evaluate selected alerts for all records to ensure that notifications get properly sent or scheduled based on the new conditions of the alert (otherwise they could only be triggered if each individual record had data modified). If a user modifies the conditional logic of an alert, it will recommend that they utilize the "Re-evaluate Alerts" functionality. If an alert has the "Ensure logic is still true..." option checked, then it is possible during this process that some already-scheduled notifications might get removed (and thus would no longer be scheduled) based on the new conditions.