

# Best Practices for Managing Users

REDCap provides two dashboards to facilitate management of users on your project (Figure 1):

- User Access Dashboard
- Sponsor Dashboard

These dashboards can be accessed from the 'My Projects' tab upon login.

## Figure 1

View of the 'My Projects' page showing the User Access and Sponsor Dashboards.

The University of Maryland requires that each user of REDCap, as hosted by the University of Maryland Libraries, is aware of, accepts, and follows the [University of Maryland Policy on the Acceptable Use of Information Technology Resources](#).

Listed below are the REDCap projects to which you currently have access. Click the project title to open the project. [Read more](#) To review which users still have access to your projects, visit the [User Access Dashboard](#).

**Dashboard pages:**  
- [User Access Dashboard](#)  
- [Sponsor Dashboard \(3 users\)](#)

## User Access Dashboard

Lists all users by project. Information includes:

- Project status
  - Development
  - Production
  - Inactive
  - Archived
- Number of users
- Number of API tokens
- Last user activity within a project
- Remove user from project controls
- User access expiration controls

## User Access Procedures

1. **All REDCap projects for your lab should be created by users with supervisory roles or designated project managers. All new projects should have a lab manager, project manager, and/or PI user added to the project.**
  - The creator of a project by default will have access to both Project Design and User Rights applications.
  - Non-supervisory users **SHOULD NEVER** have access to the User Rights application; such access will allow users to alter access rights for themselves and any other users.

## 2. Automatic access expiration dates should be set for fixed-term users.

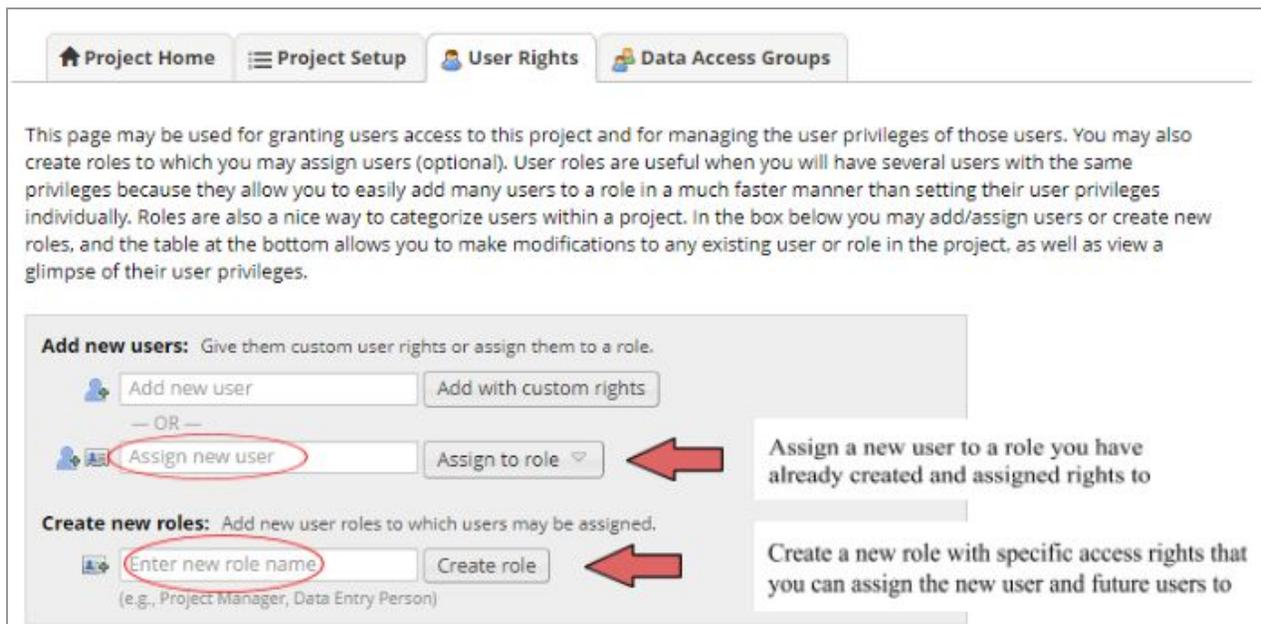
- Student workers, graduate assistants, or other fixed-term employees should have an automatic expiration date set on their account and projects.
- Expiration dates will not delete a user account or remove a user from a project, and a suspended/expired user account can easily be reinstated. However, setting expiration dates on a user account prevents unauthorized access to projects and data.

## 3. Project managers should set project user rights through the “Create New Roles” function (Figure 2).

- The lab manager, project manager, or PI should establish or delegate the creation of user roles within each project.
- User roles should assume a ‘less is better’ approach to data access and project editing privileges.
- User roles allow privileges to be set by job title/role ‘in bulk’ as opposed to manually adjusting each user’s access individually. This streamlines onboarding and offboarding procedures and prevents the loss of access to certain features when an individual is removed from a project.

**Figure 2**

View of the User Rights application page.



Project Home Project Setup User Rights Data Access Groups

This page may be used for granting users access to this project and for managing the user privileges of those users. You may also create roles to which you may assign users (optional). User roles are useful when you will have several users with the same privileges because they allow you to easily add many users to a role in a much faster manner than setting their user privileges individually. Roles are also a nice way to categorize users within a project. In the box below you may add/assign users or create new roles, and the table at the bottom allows you to make modifications to any existing user or role in the project, as well as view a glimpse of their user privileges.

**Add new users:** Give them custom user rights or assign them to a role.

Add new user Add with custom rights

— OR —

Assign new user Assign to role

**Create new roles:** Add new user roles to which users may be assigned.

Enter new role name Create role

(e.g., Project Manager, Data Entry Person)

Assign a new user to a role you have already created and assigned rights to

Create a new role with specific access rights that you can assign the new user and future users to



## Sponsor Dashboard

This dashboard lists all users that you have sponsored in REDCap and includes the following information:

- Username
- Email
- User's projects
- Suspension status
- Account expiration date (if set)
- Time of last activity and login

Each lab or project should have a single individual who is the dedicated user account sponsor. This allows a project or lab manager to request new user accounts, request administrative actions for their staff user accounts, and **control and regulate** the users working on specific projects.

**NOTE:** The sponsor dashboard will only appear if you have requested a new user account or are the designated sponsor for your lab.

## Sponsor Actions

Sponsors may request the following administrative actions for selected users (Figure 3):

- Password reset
- Set account expiration
- Revise/extend account expiration
- Request suspension/unsuspension

**NOTE:** Requested actions do not take effect until a REDCap administrator reviews and processes the request (Figure 4).

## User Suspension

All user accounts are set to automatically have access suspended after a 180-day lapse in activity or login. In the event that a user discovers their account is suspended, they should follow up with the Libraries directly by sending an email to [lib-dpi@umd.edu](mailto:lib-dpi@umd.edu). The responding REDCap administrator will attempt to confirm the

validity of the reactivation request with the appropriate project manager or PI before reactivating the account.

### Figure 3

View of all possible sponsor actions within the Sponsor Dashboard.



### Figure 4

View of the confirmation summary when administrative requests are sent.

