

Orca Search - REDCap User Guide

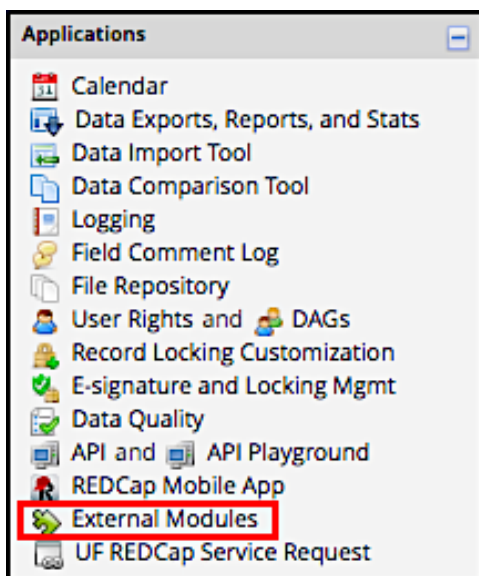
The Orca Search REDCap External Module is an alternative to the built-in Add/Edit Records. It is a customizable, searchable list dashboard.



Features

- Configurable field search options
- Configurable field display options
- New Record support for projects with and without auto-numbering enabled
- Result highlighting when searching with partial matching enabled
- Support for searching through repeating forms
- Data Access Group security
 - Users in a DAG will only see results from within their DAG
 - Users not assigned a DAG will see results regardless of DAG

Once the Orca Search module is activated, the configure **Orca Search** link will be located in the External Modules in the left-hand tool bar.



Configuration

- Enable the module in your project, if it is not already enabled
- Click **Configure** for **Orca Search Module**

Orca Search Module - v2.0.0 **Enabled for All Projects** **Discoverable**

A configurable, searchable, and performant, list dashboard

[View Documentation](#)

Configure

Disable

Options

1. Redirect Add/Edit Records to Module

- Check this option if you would like to “replace” the **Add/Edit Records** page with this module. **Do not check this option if project is longitudinal with more than one arm.**
- When a user clicks the link, they will be directed to the module’s search page.

Configure Module: Orca Search Module

Project Settings	Value
Replace the Add/Edit Records link with a link to this module's search page	<input checked="" type="checkbox"/>

NOTE: a tooltip icon will appear next to the link when this is enabled:

NOTE: a tooltip icon will appear next to the **Add/Edit Records** link when this is enabled:

Data Collection [Edit instruments](#)

- Survey Distribution Tools**
- Get a public survey link or build a participant list for inviting respondents
- Record Status Dashboard**
- View data collection status of all records
- Add / Edit Records**
- Create new records or edit/view existing ones

OR

Orca Search is located under External Modules when the **Add/Edit Records** link is not enabled

External Modules

- [Configure Email Alerts](#)
- Search Dashboard**

Do not replace the **Add/Edit Records** link for longitudinal projects with more than one arm.

2. Limit the search results

- The results can be restricted to 500, 1000, 2000, 5000, or No Limit. If the search results exceed that number, an error message will display and no results will show.

Limit the search results:
** must provide value*

Which instances to search through:
** must provide value*

- No Limit
- 500
- 1000
- 2000
- 5000

3. Which instances to search through

- Latest – search only the most recent instances of forms.
- All – all instances will be considered.
- Currently, the results table will always display the results from the latest instance, even if the matching value was found on a previous instance.

Which instances to search through:
** must provide value*

Show Instance Badge:

- Latest
- All

4. Show instance badge

- A red badge will display in the data table, indicating which instance the displayed value was found.

Show Instance Badge:

5. Include DAG (Data Access Groups) in results

- An additional column will display in the results, indicating the Data Access Group that the record belongs to.

Include DAG in results (only if project uses DAGs):

6. Search Fields

- This repeating configuration allows you to select the field(s) that you want to use as search fields.
- Fields will display in the dropdown, in the order that exist in the config.
- Fields that are select, radio, form status, etc., will display a dropdown instead of text box, for filtering by value.
- **Return Partial Matches**
- This option allows you to do a 'wildcard' search on that field (i.e., searching **wis** in a state search will return results for **Wisconsin**).

Note: This option is ignored if the field type is **radio**, **select** or **checkbox**

Click the '+' to add additional fields to search.



The screenshot shows the '1. Searchable Fields:' configuration panel. At the top right is a red circle with a white plus sign. Below the title bar, there is a section for '1. Searchable Field Name:' with a dropdown menu showing 'enrolled - Subject enrolled'. A red asterisk note below reads '* must provide value'. Below this is a section for '1. Return Partial Matches?' with a checkbox that is currently unchecked. A red asterisk note below reads '* must provide value'. A note above the checkbox states: 'NOTE: This setting is ignored for field types of **select**, **radio**, and **checkbox**:'.

7. Display Fields

- These are the fields you wish to see in the results table.
- Text values will display as-is, while structured data will show the display values.
- Selecting the *form_name_complete* fields will display accordingly (Incomplete, Unverified, Complete).
- Fields will display in the table, in the order they are selected in the config.

Example searches on next page.

Searching a text field using a partial match:

Select Search Field: Name of school your child is attending: ▾

New Record: Add new record

Search Text: hogw

Search

Show 50 entries

Student ID	Last name	First name	Grade:	Name of school your child is attending:	Resides with	Data Access Group	Record Home
3	Potter	Harry	9th Grade	Hogwarts	Father	Marshfield Clinic Center for Community Outreach Youth Net	Open
4	Granger	Hermione	5th Grade	Hogwarts	Father	Chippewa Falls-Boys and Girls Clubs of the Greater Chippewa Valley - Chippewa Falls Center	Open
5	Wesley	Ron	4th Grade	Hogwarts	Parent Dual Guardianship	Chippewa Falls-Boys and Girls Clubs of the Greater Chippewa Valley - Chippewa Falls Center	Open

Showing 1 to 3 of 3 entries

Previous 1 Next

Searching a dropdown field:

Select Search Field: Resides with ▾

New Record: Add new record

Search Text: Parent Dual Guardianship ▾

Search

Search:

Student ID	Last name	First name	Grade:	Name of school your child is attending:	Resides with	Data Access Group	Record Home
5	Wesley	Ron	4th Grade	Hogwarts	Parent Dual Guardianship	Chippewa Falls-Boys and Girls Clubs of the Greater Chippewa Valley - Chippewa Falls Center	Open
6	Dumbledore	Albus	3rd Grade	Grant	Parent Dual Guardianship	Boys and Girls Club of the Wisconsin Rapids Area - Boys and Girls Club Pitsch Center	Open



Considerations

- DateTime fields are displayed and searched using the values as they are stored in the database (YYYY-MM-DD), not the format from the Data Dictionary/Online Designer.
- For projects with significant record counts (10,000+, especially if they use DAGs), the usage of get AutoID () for adding new records will increase the load times of the module.
- For a baseline example, a project with ~45k records takes 4 – 8 seconds for the AutoID () to complete.
- Right now, Orca Search does not properly support for repeating events or for projects with multiple arms., so do not replace the Add/Edit Records link, use the Search Dashboard located in the External Modules in the left-hand tool bar.