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

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.

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

**OR**

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

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.

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.

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

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.
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.

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:

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

Showing 1 to 3 of 3 entries

Searching a dropdown field:

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