

# DAG Switcher: User Guide

## Background:

Normal REDCap behavior dictates that a logged-in REDCap user can only be assigned to *one* data access group (DAG) at a time, meaning they can only access/create records and download data for the one site (DAG) they have been assigned to. This may be useful in the case of a multi-site or multi-group project that requires that groups not be able to access/view/export another group's data. If a user needs to access another DAG's records/data, someone else on the project with permission to control DAGs must go in and manually change their assignment to that other DAG, thereby kicking the user out of the original DAG they were assigned to.

## Description:

Using the DAG Switcher, users assigned to Data Access Groups (DAGs) can optionally be assigned to *multiple* DAGs, in which they may be given the privilege of switching in and out of specifically assigned DAGs on their own. Users can also be given "No assignment" in addition to being assigned to a DAG (or DAGs) so they can switch back-and-forth between their assigned DAG(s), allowing them to easily create/update/view records within that DAG, or create/view/update all records across the entire project when they switch to "No assignment."

This may be useful in the case of a multi-site or multi-group project that requires that groups not be able to access/view/export another group's data, but *some* of the project users may need to create/access records in multiple DAGs, such as when two or more different sites share one of their study coordinators or a project manager.

## Limitations and Considerations:

- The DAG Switcher only applies to records *created* by a logged-in user, i.e. not via a public survey, who has been assigned to multiple DAGs.
- *At least two* DAGs must be enabled for a user for them to use the DAG Switcher.
- The DAG Switcher does not override a user's current DAG assignment, which is set on the DAG page.
- To assign users to multiple DAGs, a user with 'Data Access Group' user privileges must configure the DAG Switcher.
- The DAG Switcher only works when viewing the *Add/Edit Records* page and the *Record Status Dashboard* page. It does not work while in a specific record's edit/view mode.
- Records themselves can still only be assigned to *one* DAG or no DAG ("No assignment").
- For security purposes, users themselves cannot put themselves into multiple DAGs. This must be done by another user, who is not assigned to a DAG, that has the user right to do so.
- User Rights cannot vary from site to site. For example, person X cannot be given full data export rights for Site A and no data exports rights for Site B.

### Steps to use the DAG Switcher:

- 1) Add the users to your project on the *User Rights* page under the Applications menu.
- 2) Create the project's Data Access Groups on the *DAGs* page under the Applications menu (Image 1).
- 3) Assign users to a DAG or multiple DAGs on the *DAG* page.
  - If the user need access to only **one DAG**, do not use the DAG Switcher to assign them to that DAG, use the normal DAG assigning feature at the top of the DAG page (image 2).
  - If the user needs to be in **more than one DAG**, use the DAG Switcher to assign them to more than one DAG. This includes letting them have 'No Assignment' (Image 3).
- 4) Go to the Add/Edit Records page or the Record Status Dashboard page to switch between DAGs using the toggle at the top of the page (Images 4 & 5).
  - If the user is only assigned to one DAG, they will not see the DAG Switcher toggle when they access the project.
- 5) Collect data as normal in that DAG.
- 6) Use the DAG Switcher to collect data in another DAG.

Image 1:

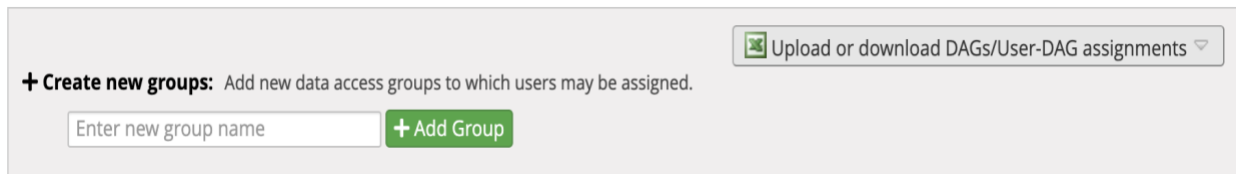


Image 2:

**Assign user to a group:** Users may be assigned to any data access group. To assign users to multiple groups, use the DAG Switcher at the bottom.

Assign user  to

Data Access Groups	Users in group	Number of records in group	Unique group name (auto-generated)	Group ID number	Delete group?
Florida A&M University	taylormgalloway (Taylor Galloway)	0	florida_am_univers	2295	✗
Florida Atlantic University	mdottington.full (M Dottington Fullwood)	0	florida_atlantic_u	2294	✗
Florida International University	handbem (Eileen Handberg)	0	florida_internatio	2293	✗
Florida State University	pbc (Philip Chase)	0	florida_state_univ	2291	✗
University of Central Florida		0	university_of_cent	2289	✗
University of Florida	c.holman (Corinne Holman)	0	university_of_flor	2288	✗
University of North Florida		0	university_of_nort	2292	✗
University of South Florida		0	university_of_sout	2290	✗
[Not assigned to a group]	tls (Taryn Stoffs) * Can view ALL records				

Image 3:


**DAG Switcher: Enable multiple Data Access Groups for users** Display options:  Rows are DAG  Rows are User

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. To assign a user to multiple DAGs, check the checkboxes below for that user. At least two DAGs must be checked for a user in order for them to use the DAG Switcher. NOTE: This does not override a user's current DAG assignment, as set above or on the User Rights page.

Show  entries

Data Access Groups	Users					
	c.holman	handbem	m.doddington.full	pbc	taylormgalloway	ts
[No Assignment]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Florida A&M University	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Florida Atlantic University	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Florida International University	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Florida State University	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
University of Central Florida	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
University of Florida	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
University of North Florida	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
University of South Florida	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Image 4:

**Current Data Access Group: University of Florida** 

**Testing DAG Switcher - test project only** PID 10029

**Add / Edit Records**

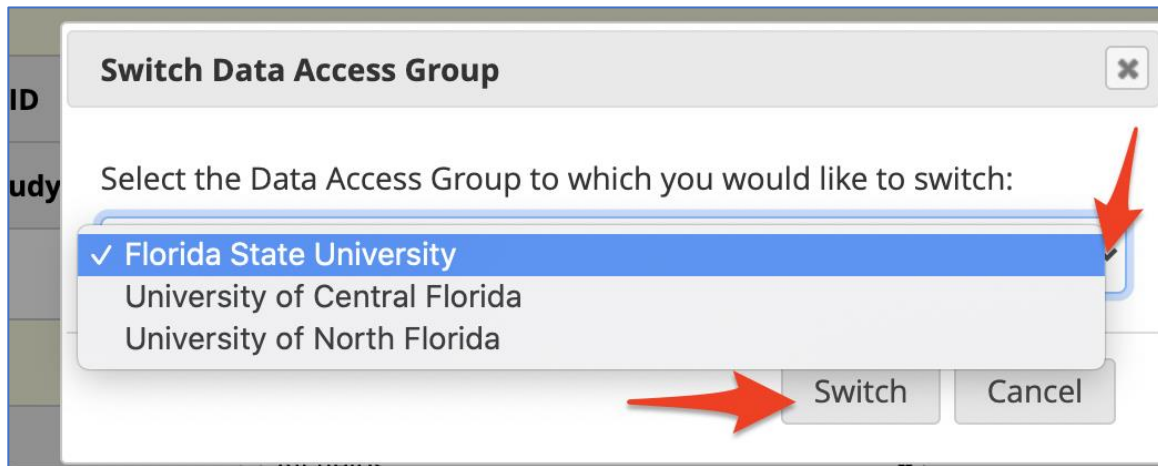
You may view an existing record/response by selecting it from the drop-down lists below. To create a new record/response, type a new value in the text box below and hit Tab or Enter. To quickly find a record without using the drop-downs, the text box will auto-populate with existing record names as you begin to type in it, allowing you to select it.

**NOTICE:** This project is currently in Development status. **Real data should NOT be entered** until the project has been moved to Production status.

Total records: 1 / In group: 0

<b>Choose an existing Study ID</b>	<input type="text" value="-- select record --"/>
<b>Enter a new or existing Study ID</b>	<input type="text"/>

Image 5:



A new record will now be created in the DAG the user switched to if they click on *Add New Record*.

**Record Home Page**

**Record "2291-1" is a new Study ID.** To create the record and begin entering data for it, click any gray status icon below.

The grid below displays the form-by-form progress of data entered for the currently selected record. You may click on the colored status icons to access that form/event.

**Legend for status icons:**

- Incomplete
- Incomplete (no data saved) ?
- Unverified
- Complete

**NEW Study ID 2291-1**

Data Collection Instrument	Status
Demographics	<input type="radio"/>
Baseline Data	<input type="radio"/>
Month 1 Data	<input type="radio"/>
Month 2 Data	<input type="radio"/>
Month 3 Data	<input type="radio"/>
Completion Data	<input type="radio"/>

If the user wants to choose an existing study/record ID, the only records that will appear in the dropdown will be those assigned to their current DAG:



















Total records: 5 / In group: 3

Choose an existing Study ID

- ✓ -- select record --
- 2291-1
- 2291-2
- 2291-3

If the user goes to the Record Status Dashboard, they will only see records in their current DAG assignment:

**Displaying:** Instrument status only | [Lock status only](#) | [All status types](#)

























Study ID	Demographics	Baseline Data	Month 1 Data	Month 2 Data	Month 3 Data	Completion Data
<a href="#">2291-1</a>						
<a href="#">2291-2</a>						
<a href="#">2291-3</a>						

If the user needs to access all records in the project, they can switch to 'No Assignment' to see all records, if they have been given the option to switch to 'No Assignment.'

 Current Data Access Group: **[No Assignment]**  **Switch**

All record can be viewed:

**Displaying:** [Instrument status only](#) | [Lock status only](#) | [All status types](#)

<b>Study ID</b>	<b>Demographics</b>	<b>Baseline Data</b>	<b>Month 1 Data</b>	<b>Month 2 Data</b>	<b>Month 3 Data</b>	<b>Completion Data</b>
<a href="#">2288-1</a>						
<a href="#">2291-1</a>						
<a href="#">2291-2</a>						
<a href="#">2291-3</a>						
<a href="#">2293-1</a>	