


REDCap Auto-Notification DET (Data Entry Trigger) Plugin – How To Guide

1. Add the Auto-Notification Bookmark to your project.

- From Project Setup tab, select **Add or edit bookmarks**



Optional

I'm done!

Set up project bookmarks (optional)

You may create custom bookmarks to webpages that exist inside or outside of REDCap. These bookmarks will be seen as links on the left-hand project menu and can be accessed at any time by users who are given privileges to do so. Every project bookmark has custom settings that allow one to control its appearance and behavior.

Go to Add or edit bookmarks

- Give the Bookmark a name under **Link Label** and paste the following URL into **Link URL/Destination** <https://redcap.musc.edu/plugins/autonotify>
- Make sure to check the box to **Append project ID to URL**

Link #	Link Label	Link URL / Destination	Link Type	User Access	Opens new window	Append record info to URL	Append project ID to URL	Delete
Add	AutoNotify <small>Enter the label for the link as it is seen on the left-hand menu</small>	://redcap.musc.edu/plugins/autonotify <small>Enter the web address (URL) for the link (e.g., http://www.mysite.com/mypage.html)</small>	Simple Link	<input checked="" type="radio"/> All users <input type="radio"/> Selected users	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

- Click **Add** and you will see the Bookmark has been added to your project and is listed under **Project Bookmarks**.

Link #	Link Label	Link URL / Destination	Link Type	User Access	Opens new window	Append record info to URL	Append project ID to URL	Delete
1	AutoNotify	https://redcap.musc.edu/plugins/autonotify	Simple Link	<input checked="" type="radio"/> All users <input type="radio"/> Selected users	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	X
Add	<input type="text"/> <small>Enter the label for the link as it is seen on the left-hand menu</small>	<input type="text"/> <small>Enter the web address (URL) for the link (e.g., http://www.mysite.com/mypage.html)</small>	Simple Link	<input checked="" type="radio"/> All users <input type="radio"/> Selected users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

- Click on your new Bookmark (listed under **Project Bookmarks**) to open and configure your Auto-Notification triggers:

The screenshot shows the 'AutoNotify: a DET-based Notification Plugin' configuration page. At the top, there are navigation tabs: Project Home, Project Setup, Other Functionality, Project Revision History, and AutoNotify. The main section is titled 'Trigger 1: T1' and includes a 'Delete trigger' button with a red 'x' icon. Below this, there are several fields: 'TITLE' (T1), 'CONDITIONAL LOGIC' ([radio] = 1), 'TEST LOGIC' (Test logic using record_id: 1 of event event_1_arm_1), and 'TRIGGER STATUS' (Enabled/Disabled). A 'Test' button is next to the test logic field. Below the trigger configuration is an 'Add another trigger' button. The 'Configure Notification Email' section includes a warning about PHI and a 'Click for help' button. It has fields for 'To' (andy123@stanford.edu), 'FROM' (redcap-help@lists.stanford.edu), 'SUBJECT' (SECURE: IMPORTANT ALERT), and 'MESSAGE' (Please do something about this). Below this is the 'Pre- and Post- AutoNotification DET Triggers' section, which has fields for 'PRE-NOTIFICATION DET URL' and 'POST-NOTIFICATION DET URL'. At the bottom, there are 'Save Configuration' and 'Refresh' buttons. Red callout boxes with arrows point to various elements: 'Delete trigger' points to the delete button; 'Define condition to evaluate on save' points to the conditional logic field; 'Test condition with existing record' points to the test button; 'Add another trigger condition. Multiple triggers share the same email settings, but have different titles and will be tracked independently' points to the 'Add another trigger' button; 'Click for help' points to the help button; 'Set who should be notified. You can include multiple emails (comma-separated)' points to the 'To' field; and 'You can execute other DETs before or after this by entering the urls here.' points to the pre-notification DET URL field.

- IMPORTANT NOTE:** Once all DETs and email preferences have been configured on the Auto-Notification Bookmark screen, the URL listed under the Data Entry Trigger section of your project **MUST BE UPDATED** in order for the plugin to work.
- Navigate to Project Setup > Additional Customizations > Data Entry Trigger
 - Update the URL listed under the Data Entry Trigger section to include **det/** just after autonotify/
 - For example, <https://redcap.musc.edu/plugins/autonotify/?a> should be updated to: <https://redcap.musc.edu/plugins/autonotify/det/?a>
 - The /det update listed above **MUST** be completed **ANY TIME** a change is made to the Auto-Notification plugin including adding/modifying triggers and/or modifying the email notification section.

5. Testing is YOUR responsibility

Be sure to test thoroughly! This is a plug-in created by REDCap users and shared on the REDCap Consortium Wiki – making sure triggers work for your specific project is your responsibility.

6. You can utilize the Logging feature listed under Applications to confirm that an Auto-Notification was triggered (see below)

Time / Date	Username	Action	List of Data Changes OR Fields Exported
05/28/2014 12:14pm	klk@musc.edu	Manage/Design	Click project bookmark
05/28/2014 12:08pm	clarkjt@musc.edu	Manage/Design	Modify project settings
05/28/2014 12:06pm	klk@musc.edu	Manage/Design	Click project bookmark
05/28/2014 11:38am	clarkjt@musc.edu	Manage/Design	Click project bookmark
05/22/2014 8:25am	klk@musc.edu	Manage/Design	Click project bookmark
05/21/2014 4:23pm		AutoNotify Alert (Screening and Protocol Actions)	title, Last Name Match record,4 event,screening_and_prot_arm_1

7. How many times will a trigger fire?

The rules will match only one time per RECORD + EVENT + TRIGGER NAME.

- Pretend you have a project with many instruments. You have two questions about suicidality that you want to monitor and they are on different instruments.

If you create a single trigger like [q10]=4 OR [q20]=3. In this case, if EITHER of these criteria were met, the rule would fire and send an email. So, if on the first survey they marked '4' for Q10, it would fire. But, if they came back later and took another survey and marked '3' for q20 it WOULD NOT FIRE AGAIN, since that rule had already fired for this record. If you want to have separate emails for each question, you should define two different triggers.

Now, imagine your project is longitudinal and the survey is given each week. The trigger will fire a NEW email for each event. So, if it already fired for baseline and the user comes back 1 month later and answers Q10=4 it will fire again.

- The plugin uses the log entries to keep track of which rules/records/events have triggered an alert.

10:14pm 10/16/2013	AutoNotify Alert	title,SUICIDE WARNING record,5 event,baseline_arm_1
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- If you change the name of a rule and resave a positive record, it will fire a new alert.

8. Emails

Below is a sample of what the email notification looks like

REDCap AutoNotification Alert

Title **Last Name Match**
Project REDCap 201 Demo Database
Event screening_and_prot_arm_1
Instrument clinical_trial_and_navigate_screening_and_enrollme
Record 4
Date/Time 2014-05-21 16:23:31
Message See message

View Record To view this record, visit this link:
https://redcap.musc.edu/redcap_v5.10.1/DataEntry/index.php?pid=304&page=clinical_trial_and_navigate_screening_and_enrollme&id=4&event_id=1721

- a. Because the RECORD_ID is included in the email, you **SHOULD NOT USE THIS PLUG IN FOR PROJECTS WHERE THE RECORD_ID IS PHI!**

9. Provide Feedback – THIS IS IMPORTANT

- a. The Auto-Notification plugin is NOT part of the standard REDCap support package. Therefore REDCap upgrades *may* impact this functionality; there is potential for a REDCap upgrade to break the Auto-Notification configuration for project(s).
- b. Therefore we ask that you please send an email to redcap@musc.edu alerting us to the fact that you have an active research project and that is utilizing the Auto-Notification Plugin.