

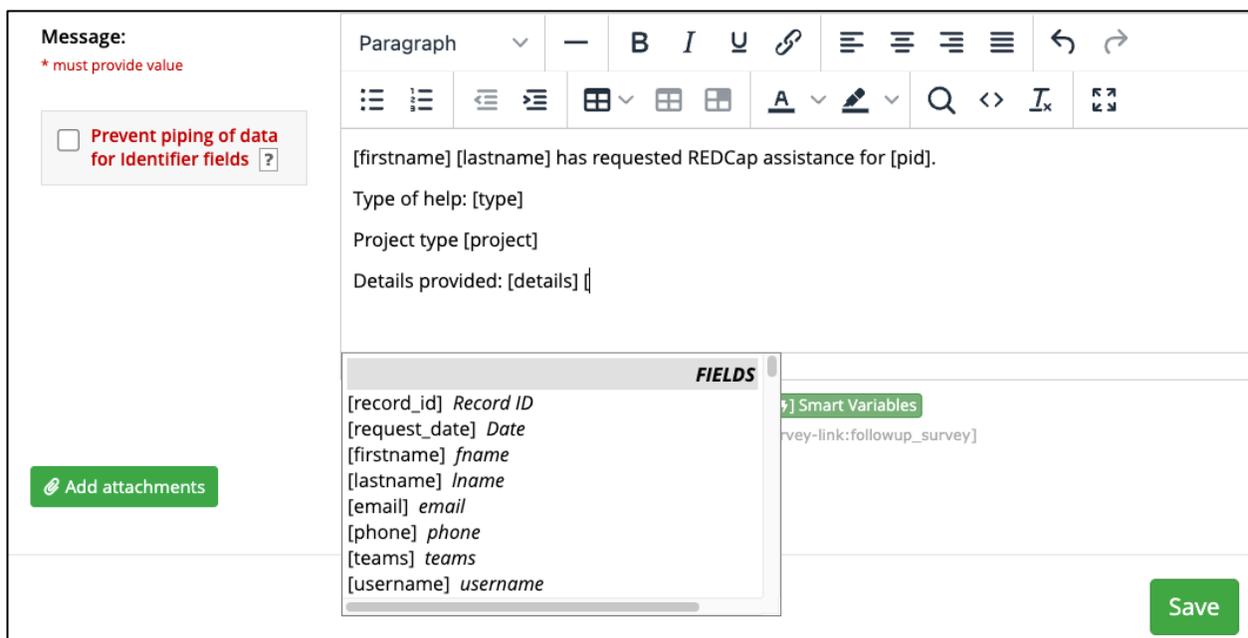
Quick Guide to Alerts & Notifications in REDCap

You may email survey results – responses and/or a PDF version to yourself or someone else. This is helpful for short surveys or data collections forms where the data do not need quantitative analysis to be useful (e.g., web forms).

1. In the Applications menu, choose Alerts and Notifications.



2. Use + Add new Alert to create the alert.
3. Choose how you would like the alert triggered and which survey/instrument (if your project has more than one). Other options include when and how many times to send the alert. Currently Upstate users are unable to use text or phone call alerts.
4. Create the email.
 - a. Choose the project user that will appear in the From field
 - b. Enter recipient email(s). For users in REDCap, select from list generated in the Select Recipients field. If an email address is collected in the form, it can be piped to add it as a recipient. To email users not in our REDCap system, enter manually.
 - c. You may cc or bcc by selecting + Show more options
 - d. Add a subject
5. Create the message, piping the fields from the form and/or the attachments that you would like included in the message.
 - a. Piping – use [] for fields to be piped. Variables eligible for piping will appear in a list when the open bracket is typed. These may be added anywhere in the message body.

A screenshot of the REDCap alert creation interface. The interface is divided into several sections. On the left, there is a 'Message:' section with a red asterisk and the text '* must provide value'. Below this is a checkbox labeled 'Prevent piping of data for Identifier fields' with a question mark icon. At the bottom left of this section is a green button labeled 'Add attachments'. The main area is a rich text editor with a toolbar at the top containing various icons for text formatting (bold, italic, underline, link), alignment, and undo/redo. The text area contains the following text: '[firstname] [lastname] has requested REDCap assistance for [pid].', 'Type of help: [type]', 'Project type [project]', and 'Details provided: [details]'. Below the text area is a 'FIELDS' list showing a scrollable list of variables: [record_id] Record ID, [request_date] Date, [firstname] fname, [lastname] lname, [email] email, [phone] phone, [teams] teams, and [username] username. To the right of the fields list is a 'Smart Variables' section with a dropdown arrow and the text 'Survey-link:followup_survey'. At the bottom right of the interface is a green button labeled 'Save'.

- b. Add attachments as needed. You may choose from the upload fields or attach a file from your computer.
- c. To attach a PDF of the survey/instrument responses, an upload field must be added to the form and enabled in the Survey Settings.

Edit Field

You may add a new project field to this data collection instrument by completing the fields below and clicking the Save button at the bottom. When you add a new form on this page. For an overview of the different field types available, you may view the [Field Types video \(4 min\)](#).

Field Type: File Upload (for users to upload files)

Question Number (optional)
Displayed only on the survey page

Field Label Use the Rich Text Editor ?

completed repsonse

Action Tags / Field Annotation (optional)

@HIDDEN ← Hide field/question from respondents

Variable Name (utilized in logic, calculations, and formulas)

completed_response

ONLY letters, numbers, and underscores

How to use [Smart Variables](#) [Pi](#)

Required?* No Yes
* Prompt if field is blank

Identifier? No Yes
Does the field contain identifying information (e.g., name, email, phone number, etc.)

Custom Alignment Left / Vertical

Align the position of the field on the page

Field Note (optional)
Small reminder text displayed underneath field

After creating the upload field, choose that variable when selecting the option to save a PDF of completed survey.

PDF file of their responses for the survey they just completed.

Save a PDF of completed survey response to a File Upload field

A PDF copy of the survey response will be immediately stored in the field selected on the right whenever a participant completes this survey.

completed_response "completed repsonse"

Choose a File Upload field from the drop-down above to enable this feature. Tip: If desired, the field may exist on the survey instrument that is triggering it, in which the field can be hidden on the survey page using the action tag @HIDDEN-SURVEY. Note: This feature cannot be triggered by submitting a data entry form EXCEPT only when a user clicks the 'Save & Mark Survey as Complete' button on the data entry form. Note: If the current survey settings allows participants to return to completed responses, then any existing PDFs that have already been stored in this File Upload field will be overwritten by any new ones if the survey is completed again.

Add the PDF to the alert email

Message Attachments (Max file size: 10MB)

File Upload fields:

You may utilize files attached to records that have been uploaded into File Upload or Signature fields.

Select file upload fields

[screenshot] "A screenshot of an error message or i... e.edu. Thanks!"

[completed_response] "completed repsonse"

-- and/or --

Attachment #1: No file chosen

[+ Add another attachment](#)