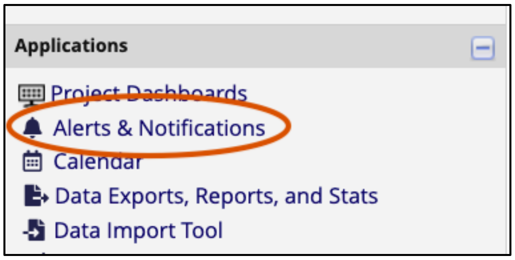
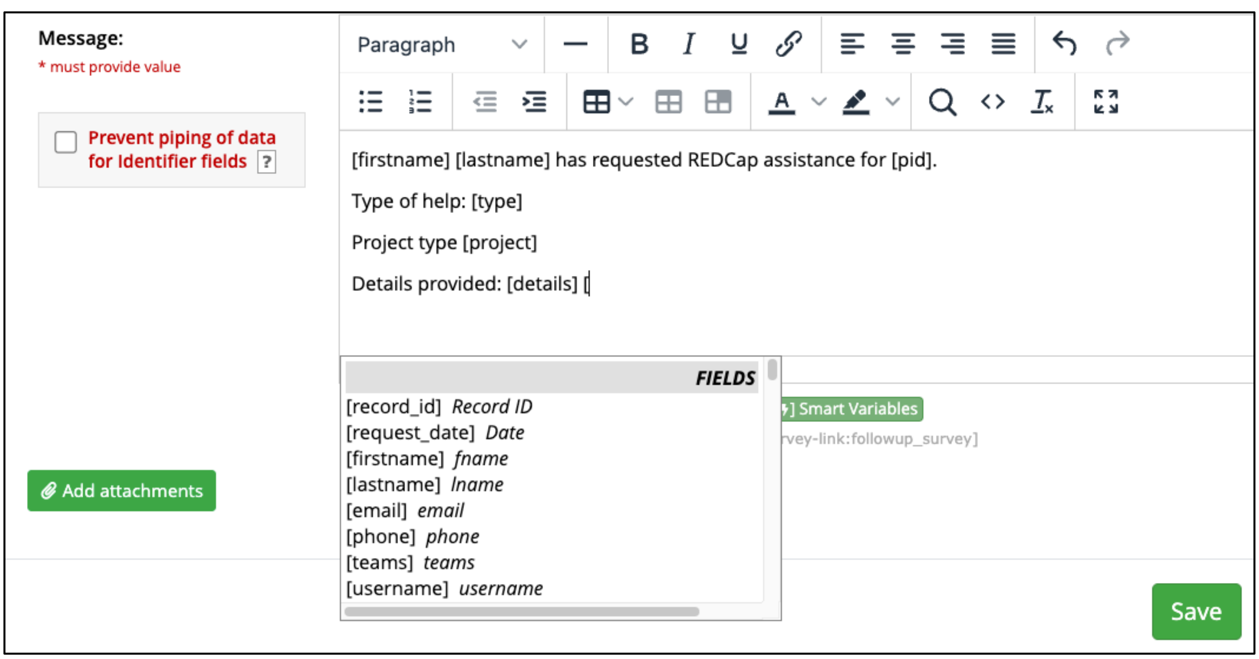
Quick Guide to Alerts & Notifications in REDCap

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.

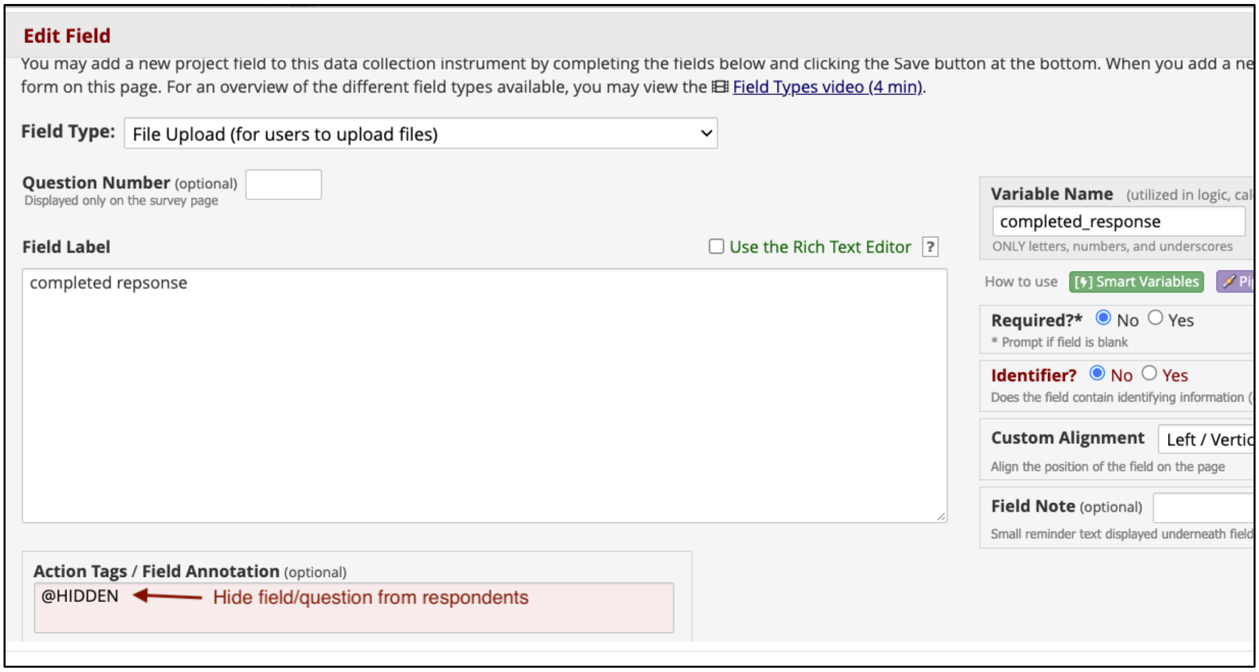


2. Use + Add new Alert to create the alert.
3. Choose how you would like the alert triggered and which survey/instrument (if your project has more than one). Other options include when and how many times to send the alert. Currently Upstate users are unable to use text or phone call alerts.
4. Create 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.

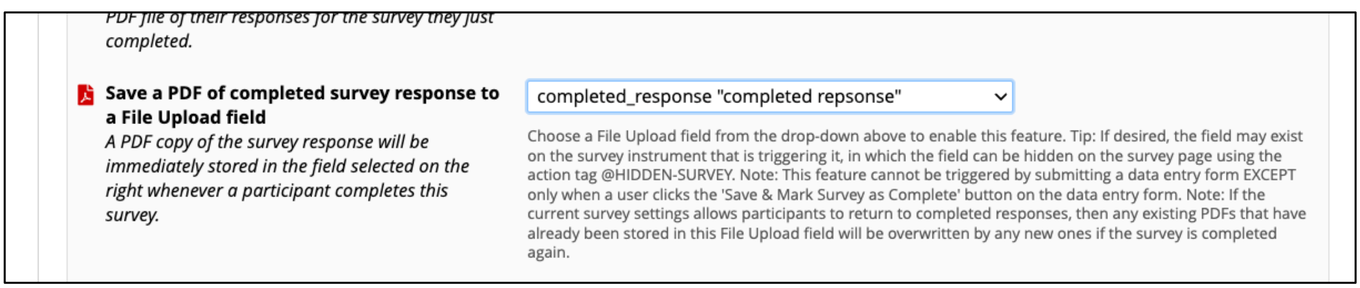


b. Add attachments as needed. You may choose from the upload fields or attach a file from your computer.

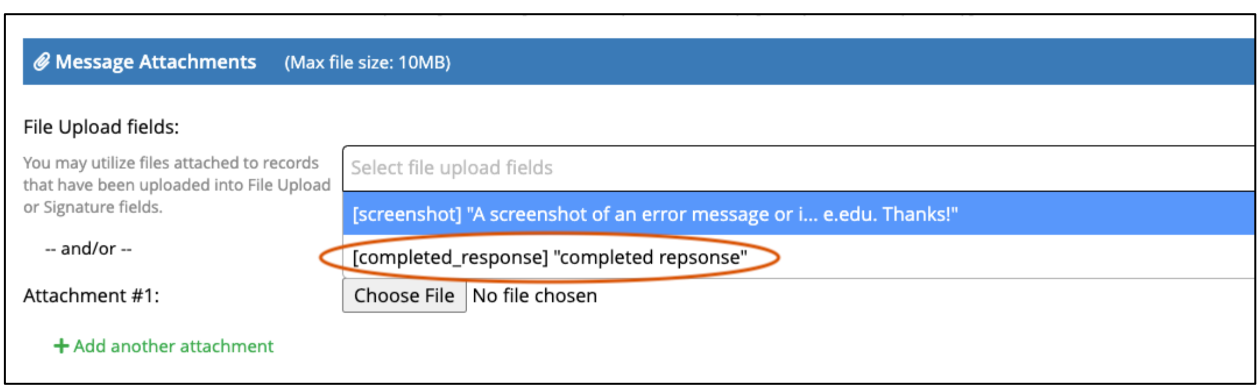
c. To attach a PDF of the survey/instrument responses, an upload field must be added to the form and enabled in the Survey Settings.



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



Add the PDF to the alert email



Last updated 10/2022