Data Resolution Workflow in REDCap

Data queries are common in any project where more than one person is involved in data entry, data quality validation, or data export. Someone might question a response if it looks unusual or unexpected, for example, if a follow-up response does not match a prior entry. In this case, there might be an exchange of emails or messages between the data entry personnel and the researcher conducting the data quality check. These exchanges are often hard to refer back to afterwards, and the validation process can be lost from the record.

REDCap's data resolution workflow offers a formal method of managing and documenting data queries in REDCap. It allows queries regarding a particular data point to be initiated, responded to, and resolved by assigning point persons for each task.

Enabling and using data resolution workflow in REDCap

1. Select 'Project Setup' from project main page.

2. Scroll down, and in 'Enable optional modules and customizations' select 'Additional Customizations.'

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3. In the pop-up window, ensure that the box is checked for 'Enable the field comment log or data resolution workflow (data queries), and next to 'Enable', select 'Data resolution Workflow' from the drop down menu.

☑ 💬 **Enable the Field Comment Log or Data Resolution Workflow (Data Queries)?**
For this project, you may enable either the Field Comment Log or Data Resolution Workflow (also known as the Data Queries module). The Field Comment Log (enabled by default) allows users to leave comments for any given field on a data entry form by clicking the balloon icon next to the field. All comments can also be viewed, searched, and downloaded on the Field Comment Log page. Alternatively, if the Data Resolution Workflow is enabled, users will be allowed to open a workflow for documenting the process of resolving issues with data in the project (i.e. opening, responding to, and closing data queries). View more details

Enable: [Data Resolution Workflow ⌄]

☐ Allow users to edit or delete Field Comments (excludes Data Resolution Workflow comments)?

4. Close out of the confirmation window listing the next steps.

Data Resolution Workflow: Instructions   ✖

✔ **The Data Resolution Workflow has now been enabled!**
Please read the instructions below regarding your next steps or view the video.

⊞ VIDEO: Data Resolution Workflow

5. Select 'User Rights' under 'Applications' on the far left on the project main page.
6. Click on the username, and then select 'Edit User Privileges.'
7. Edit user privileges in the 'Date Resolution Workflow' section that now appears.

👤 **Editing existing user "su-fahmed81@illinois.edu"**

🔔 Alerts & Notifications	☑
🗓 Calendar	☑
🔍 Add/Edit/Organize Reports	☑
Also allows user to view ALL reports (but not necessarily all data in the reports)	
📊 Stats & Charts	☑
📥 Data Import Tool	☑
≠ Data Comparison Tool	☑
📋 Logging	☑
📁 File Repository	☑
📋 Data Quality	☑ Create & edit rules
What is Data Quality?	☑ Execute rules
💬 Data Resolution Workflow	◯ No Access
What is Data Resolution Workflow?	◯ View only
	◯ Open queries only
	◯ Respond only to opened queries
	◯ Open and respond to queries
	⦿ Open, close, and respond to queries
🖥 API	☐ API Export
What is the REDCap API?	☐ API Import/Update

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8. The conversation bubble that exists next to each survey question now has 'query' capabilities.

    ○ Cake
    (H) ● Ice cream
    💬 ○ Cookies
    ○ Fruit

9. Begin a query and assign it to a designated user.

    ### 💬 Data Resolution Workflow ✕

    ⊞ VIDEO: Data Resolution Workflow

    This pop-up displays the Data Resolution Workflow for the specified record for a given field and/or Data Quality rule. Users with appropriate user privileges may open data queries to begin a documented process of resolving an issue with the data. Opened data queries may thus be responded to by users with appropriate privileges, and then they may be closed once the issue has been resolved. All data queries can also be viewed on the Resolve Issues page in this project.

    Study ID: **13**
    Field: **fav_des** ("Favorite dessert")
    Status: 💬 **Not Opened**

Date/Time	User	Comments and Details
12-12-2023 6:16pm	su-fahmed81@illinois.edu	Data Changes Made: fav_des = 'Ice cream (2)'
12-12-2023 6:20pm	su-fahmed81@illinois.edu	○ **Verified data value** — OR — ● **Open query** Assign query to a user (optional): su-fahmed81@illinois.ed ⌄ Notify this user of their assignment using: ☐ Email Comment: Respondent indicated milk allergy

    [Open query] [Cancel]

10. In the survey, the bubble next to the response now has a red exclamation through it indicating a query has been opened and a response is needed.

    ○ Cake
    (H) ● Ice cream
    💬⚠ ○ Cookies
    ○ Fruit

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11. The new 'Resolve issues' section under 'Applications' on the far left on the project main page allows the designated user to respond to the query.

📋 Data Quality and 💬 Resolve Issues

12. Designated user responds to the query.

Date/Time	User	Comments and Details
12-12-2023 6:16pm	su-fahmed81@illinois.edu	Data Changes Made: fav_des = 'Ice cream (2)'
12-12-2023 6:21pm	su-fahmed81@illinois.edu	Action: Opened query Assigned to user: su-fahmed81@illinois.edu (Fatima Ahmed) Comment: "Respondent indicated milk allergy" ⇄ Assign to other user
12-12-2023 6:22pm	su-fahmed81@illinois.edu	◉ **Reply with response:** Other ▾ Upload file (optional): ⊕ Upload file — OR — ○ **Close the query** Comment: respondent consumes non-dairy ice cream

Respond to query   Cancel

13. The bubble now contains a blue exclamation mark.

○ Cake
Ⓗ ◉ Ice cream
💬 ○ Cookies
○ Fruit
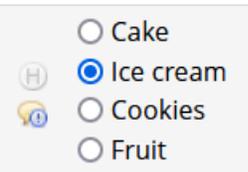
14. Clicking on the bubble allows a third user to close and resolve the query.

Date/Time	User	Comments and Details
12-12-2023 6:16pm	su-fahmed81@illinois.edu	Data Changes Made: fav_des = 'Ice cream (2)'
12-12-2023 6:21pm	su-fahmed81@illinois.edu	Action: Opened query Assigned to user: su-fahmed81@illinois.edu (Fatima Ahmed) Comment: "Respondent indicated milk allergy" ⇄ Assign to other user
12-12-2023 6:23pm	su-fahmed81@illinois.edu	Response: Other Comment: "respondent consumes non-dairy ice cream" ⇄ Assign to other user
12-12-2023 6:25pm	su-fahmed81@illinois.edu	◉ **Close the query** ○ **Send back for further attention** Comment: verified

[Close the query] [Cancel]

15. The bubble next to survey response now has a green checkmark indicating a resolved query.