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# **Managing REDCap Project Users - User Access Dashboard** and **Sponsor Dashboard**

## **What is the User Access Dashboard?**

The User Access Dashboard is a centralized reporting tool that supports efficient user management for all REDCap projects where you have *User Rights* privileges. It provides a summary of:

* All projects in which you are authorized to manage user access.
* All users with access to each of those projects.
* Project filters, including by *status* and *purpose*, to help focus your review.

To maintain proper data security and project oversight, **all Designated Project Managers** (and/or PIs) are expected to periodically review their **User Access Dashboard**—ideally once per month. This routine check ensures that:

* All project users have appropriate access levels.
* Users who have left or are leaving your project are promptly removed or expired.
* Access privileges are up to date with current project needs.

## **How to Use the Dashboard?**

To see your User Access Dashboard, navigate to the REDCap Home Page when you are logged in and click the link at the top of the page:

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*Review the User Access Dashboard periodically to review project users*

* Review the table: Check each project and associated users.
* Update access as needed:
	+ Remove users who should no longer have access.
	+ Expire access by setting the end date (default: yesterday).
* Apply changes: Be sure to click the button at the bottom of the page to confirm and implement your changes. Updates take effect immediately.

*Note: While changes can still be made directly within individual projects, using the Dashboard helps streamline and centralize the process.*

## **Managing External Accounts in REDCap**

All non-UConn Health users are set up with external accounts and must be sponsored by their UConn/UCH Principal Investigator (PI). The Sponsor (PI) is responsible for managing those account operations.

If you are a PI with external REDCap users, please review your **Sponsor Dashboard** on the **My Projects** page to:

* View who has access to your projects.
* Request password resets.
* Request account extensions for external users.

## **Sponsor Dashboard Overview**

The Sponsor Dashboard allows sponsors to manage their sponsored external users' accounts. Key features include:

* Account information: View username, name, expiration date, and last activity date.
* Administrative actions: Submit requests to the REDCap Admin for:
	+ Password resets
	+ Changing expiration dates
	+ Suspending or unsuspending accounts



## **Suspending External User Accounts**

PI/Sponsors should request the suspension of accounts for users who are **no longer active** on a project by following the steps below:

1. Go to the **Sponsor Dashboard**.
2. Check the box next to the user(s) to suspend.
3. Click the **red “Suspend user”** button.



1. In the **pop-up window**, click **Submit**.



1. The REDCap Team is notified and approves the request.
2. The sponsor will receive an automatic email confirmation when the suspension is approved.

## **Unsuspending External User Accounts**

Sponsors may request to **unsuspend an account** if the user needs continued access.

🔒 **If an account is automatically suspended due to inactivity, it should remain suspended. Do NOT request unsuspension.**

**How to Unsuspend an Account:**

1. Go to the **Sponsor Dashboard**.
2. Check the box next to the user(s) to unsuspend.
3. Click the **green “Unsuspend user”** button.



1. In the **pop-up window**, click **Submit**.



1. The REDCap Administrator is then notified and will approve the request.
2. The Sponsor receives an automatic email confirmation when the unsuspension is approved.

# **Changing Sponsors**

* If there is a change in the external user’s PI, the new PI should be designated as their sponsor. Please submit a request to  redcap@uchc.edu and cc the new Sponsor.
* Include the following information in your email:
	1. External user's username.
	2. New Sponsor's name. Sponsors must be a UCH REDCap user, i.e. UCH/UConn Faculty/Staff who have logged into REDCap and set up their profile with their uchc.edu/uconn.edu email address.