

## 15 Direct Data Entry With Survey

### System Setup

REDCap Version	LTS 10.0.5	Application URL	https://redcaprsvc.app.vumc.org/
Browser Version	Chrome 89.0.4389.128 64b	OS Version	W10
Actual Execution Time	2.5 Hrs		
Instructions	Reference User Guide for Community User		

### Test Summary

**Feature Category Description:** Data Collection and Storage - Supports the gathering and entering of data through a user interface, survey responses and data import with the ability to save, retrieve, and delete that data.

**Test Purpose Details:** This test script validates survey features and functionality for data collection.

#### Functional Requirements:

- Direct data entry through the survey feature

##### Control Center

- 15.3 The system shall allow the survey feature to be enabled or disabled.
- 15.8 The system shall allow users to edit survey responses to be enabled or disabled.

##### User Interface – Survey Distribution

- 15.12 The system shall allow creation of a participant list automatically using a designated email field when a survey is not in the first instrument position.
- 15.15 The system shall provide a survey to be generated from within a participant record using these survey options:
  - Log out + Open survey
  - Open Survey link
- 15.15 The system shall prompt the user to leave the survey to avoid overwriting survey responses when opening surveys from a data entry form when using the Open Survey link.
- 15.21 The system shall allow creation of a participant list manually where each survey is assigned a unique survey link when the survey is in the first instrument position.

##### User Interface

- 15.15 The system shall support the ability for a participant to enter data in a data collection instrument enabled and distributed as a survey.
- 15.24 The system shall allow submitted survey responses to be changed by a user who has edit survey responses rights.
- 15.29 The system shall support the following statuses for surveys:
  - Incomplete (no data saved)
  - Partial Survey Response
  - Completed Survey Response

##### User Interface – Survey Project Settings

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- 15.30 The system shall support a participant list for each survey in the project. A dropdown menu will list each survey or if a longitudinal project, each survey/event pairing from which to select the survey of interest.
- 15.30 The system shall support tracking responders and non-responders to surveys when using the participant list.
- 15.32 The system shall delete all survey-related information and functions including survey link, return codes and date/time stamp when disabling survey functionality. Saved data will remain unaffected.

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### Test Requirements

#### Test Users

ID	User Name	Password	Minimum User's Rights	DAGs and Other Settings
1.	admin1005	Pswd_1103	Administrator	Pre-existing administrator user
2.	user1005_1	1005_1Pswd		Remove from this project
3.	user1005_3	1005_3Pswd	Project Design and Setup User Rights Data Exports: Full Data Set Data Entry Rights = View & Edit	Control Center, User Settings: Allow users to edit survey responses = Disabled
4.				

### Project Setup

ID	Description	Instructions
1.	Project: 15_DirectDataEntry_Survey_v1005	This project exists and was created from a copy of pre req 7
2.	Data Dictionary: 15_DirectDataEntry_SurveyDD.csv	Upload this data dictionary before continuing with Project Setup items to follow
3.	Project Setup	<p>All data erased (Other Functionality tab)            Designate an email field... disabled            Use Surveys disabled            Use Longitudinal enabled            Define My Events:              Project has only Arm 1              Arm 1 has only two Events: Event 1 and Event 2            Designate instruments:              Demographics to Event 1              Designate Survey to Event 1 and Event 2            Repeatable instruments disabled            Auto-numbering for records enabled            All remaining optional modules disabled</p> <p>Control Center, Modules Configuration:            Enable the use of surveys in projects = Disabled</p>

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4.	Data Import File Name: 15_DirectDataEntry_SurveyIMP.csv	Download and save the import file. It will be needed during the test steps in the following section.
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### Test Steps

Step #	Action Step	Expected Result	Pass / Fail	Comments
<i>Help</i>	<i>You must perform the actions listed in this column.</i>	<i>After performing the actions in the 'Action Step' column, you should see the following.</i>	<i>Check 'Pass', if the actual results match the 'Expected Result'; otherwise, check 'Fail'.</i>	<i>Include unexpected results, suggestions. etc.</i>
1.	Navigate to the validation website's REDCap login page  Login as admin1005	Successful login	<input type="checkbox"/> Pass  Fail <input type="checkbox"/>	
2.	Go to My Projects and open 15_DirectDataEntry_Survey_v1005 project  Verify the project complies with all project setup steps in the Test Requirements section of this script.	The project opens successfully  Test Requirements met as written for this script.	<input type="checkbox"/> Pass  Fail <input type="checkbox"/>	
3.	Go to Project Setup	The enable Survey option is not available in the Main project settings	<input type="checkbox"/> Pass  Fail <input type="checkbox"/>	
4.	Go to Control Center, Modules Configuration  <b>Enable the use of surveys in projects?</b> = Enable  Save	The Modules Configuration page displays  Your system configuration values have now been changed!	<input type="checkbox"/> Pass  Fail <input type="checkbox"/>	
5.	Go to My Projects and open 15_DirectDataEntry_Survey_v1005 project	The project opens successfully	<input type="checkbox"/> Pass  Fail <input type="checkbox"/>	

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6.	Go to Project Setup  <b>Enable surveys in this project</b>	The Use surveys in this project? is visible and enabled (green) in the Main project settings	<input type="checkbox"/> Pass  Fail <input type="checkbox"/>	
7.	In Online Designer  Ensure the survey instrument is NOT already enabled as a survey.  <b>Enable the Survey instrument as a survey</b>  Accept the defaults and Save	The Online Designer tab displays the Demographics and Survey instruments. The Enable button is shown under the Enabled as survey column and nothing is shown under survey-related options column.  The Set Up My Survey tab displays  Your survey settings were successfully saved! The Survey instrument is enabled and a checkmark is in the green icon in the Enabled a survey column	<input type="checkbox"/> Pass  Fail <input type="checkbox"/>	
8.	Go to User Rights  <b>Edit user privileges for user1005_3</b>    Cancel	User Rights tab displays  Editing existing user page displays <ul style="list-style-type: none"> <li>Data Entry Rights shows No Access, Read Only, and View &amp; Edit options</li> <li>View &amp; Edit is selected</li> <li>No Edit survey responses checkbox is visible</li> </ul> Return to User Rights tab	<input type="checkbox"/> Pass  Fail <input type="checkbox"/>	

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9.	Go to Control Center, User Settings  <b>Allow users to edit survey responses?</b> = Enabled	The User Settings page appears  Your system configuration values have now been changed!	<input type="checkbox"/> Pass  Fail <input type="checkbox"/>	
10.	Go to My Projects and open 15_DirectDataEntry_Survey_v1005 project  Go to User Rights  <b>Edit user privileges for user1005_3</b>  Cancel	The project opens successfully  User Rights tab displays  Editing existing user page displays and the Edit survey responses checkbox is <ul style="list-style-type: none"> <li>• available</li> <li>• unchecked</li> </ul> Returns to User Rights tab	<input type="checkbox"/> Pass  Fail <input type="checkbox"/>	
11.	Go to Data Import Tool  <b>Import 15_DirectDataEntry_SurveyIMP.csv</b>	Data Import Tool page displays  Data is imported; two records exist.	<input type="checkbox"/> Pass  Fail <input type="checkbox"/>	See 16_DataImport_v1005.docx
12.	Go to Survey Distribution Tools, Participant List tab         <b>In the Participant List dropdown, select Event 2</b>	These columns display in the Participant grid: Email, Record, Participant Identifier, Responded?, Invitation Scheduled?, Invitation Sent?, Link, and Survey Access Code and QR Code  Two participants are listed in the Participant List for Event 1  Two participants are listed in the Participant List for Event 2	<input type="checkbox"/> Pass  Fail <input type="checkbox"/>	
13.	Go to Project Setup		<input type="checkbox"/> Pass  Fail <input type="checkbox"/>	

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	<b>Designate an email field</b>  <b>Select “email” from the Choose and email dropdown</b>  Save	Designate an email field... page displays  Designate an email field is checked and appears in green		
14.	Go to Add/Edit Records and open record 1  Open Demographic instrument in Event 1	Record Home Page displays  No Survey options dropdown exists	<input type="checkbox"/> <b>Pass</b>  <b>Fail</b> <input type="checkbox"/>	
15.	Go to Add/Edit Records and open record 1  Open Survey instrument in Event 2  In the Survey options dropdown, select <b>Open survey</b>  <b>Add an email address: test1@test.com</b>  Submit  Close  Leave without saving changes	Record Home Page displays  The Survey instrument opens and the Survey options dropdown is visible  The Survey instrument opens in a web browser  Recommended: Leave this page while survey is in session  Record Home Page shows checkmark in green circle indicating the survey for Event 2 is complete	<input type="checkbox"/> <b>Pass</b>  <b>Fail</b> <input type="checkbox"/>	
16.	Go to Add/Edit Records and open record 2  Open Survey instrument in Event 2  In the Survey options dropdown, select <b>Log out &amp; Open survey</b>	Record Home Page displays  The Survey instrument opens  The Survey instrument opens in a web browser and user is logged out of REDCap	<input type="checkbox"/> <b>Pass</b>  <b>Fail</b> <input type="checkbox"/>	

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	<p><b>Add an email address:</b> <b>test2@test.com</b></p> <p>Submit</p> <p>Close</p> <p>Login as admin1005</p>	<p>Returns to REDCap login page</p> <p>Successful login and returns to Survey instrument displaying saved survey data</p> <p>Message at top states the Survey response is editable.</p>		
17.	<p>Go to Survey Distribution Tools, Participant List tab</p> <p><b>Participant List belonging to: Survey Event 2</b></p>	<p>Participant List tab displays</p> <p>Participant List = Survey Event 1 Responded? is gray for both emails</p> <p>Responded? is green for both emails</p>	<p><input type="checkbox"/> Pass</p> <p>Fail <input type="checkbox"/></p>	
18.	Go to Add/Edit record	Two records appear in the record dropdown	<p><input type="checkbox"/> Pass</p> <p>Fail <input type="checkbox"/></p>	
19.	<p>Go to Edit instruments</p> <p><b>Enable the Demographics instrument as a survey</b></p> <p>Accept the defaults and Save</p>	<p>The Online Designer tab displays the Demographics instrument in the first row</p> <p>The Set Up My Survey tab displays</p> <p>Your survey settings were successfully saved!</p> <p>The Demographics instrument is enabled and a checkmark is in the green icon in the Enabled a survey column</p>	<p><input type="checkbox"/> Pass</p> <p>Fail <input type="checkbox"/></p>	
20.	Go to Survey Distribution Tools, Public Survey Link	<p>Public Survey Link tab displays</p> <p>Demographics survey appears in web page.</p>	<p><input type="checkbox"/> Pass</p> <p>Fail <input type="checkbox"/></p>	



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	<b>Open public survey.</b> Do not submit. Close browser tab	Public Survey Link tab displays		
21.	Go to Survey Distribution Tools, Participant List tab  Participant List belonging to: select Demographic Event 1  <b>Add participants</b> and enter two email addresses, one per line: <b>test3@test.com</b> <b>test4@test.com</b>  Confirm Add participants	The Participant List tab displays  The Add Emails to Participant List displays  Participants Added! The two additional email addresses appear in the Email column of the Participant List	<input type="checkbox"/> <b>Pass</b>  <b>Fail</b> <input type="checkbox"/>	
22.	Logout as admin1005  Login as user1005_3	Successful logout  Successful login	<input type="checkbox"/> <b>Pass</b>  <b>Fail</b> <input type="checkbox"/>	
23.	Go to Add/Edit Records and open record 1  <b>Select the Survey instrument in Event 2</b>	Message at top states Survey response is read-only. The Edit button is not visible.	<input type="checkbox"/> <b>Pass</b>  <b>Fail</b> <input type="checkbox"/>	
24.	Go to User Rights  Edit user privileges for user1005_3  Data Entry Rights: <b>Edit survey responses = checked for Survey instrument</b>  Save	User Rights tab displays  User "user1005_1" was successfully edited	<input type="checkbox"/> <b>Pass</b>  <b>Fail</b> <input type="checkbox"/>	See 6_Assign User Rights_v1005.docx
25.	Go to Add/Edit Records and open record 1	Message at top states Survey response is	<input type="checkbox"/> <b>Pass</b>  <b>Fail</b> <input type="checkbox"/>	

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	Select the Survey instrument in Event 2  Edit response  <b>Add text to the reminder field and Save &amp; Stay</b>	editable. Edit button is enabled  Message changes to "now editing"  Changes are saved		
26.	Go to Edit instruments  Open Survey settings for Survey instrument  <b>Allow 'Save &amp; Return Later' option = Yes</b>	Modify survey settings tab displays  Your survey settings were successfully saved!	<input type="checkbox"/> Pass Fail <input type="checkbox"/>	
27.	Go to Survey Distribution Tools, Participant List  Select <b>Demographics Event 1</b> in the dropdown and <b>open the survey link for test3@test.com</b>  Complete the survey, submit, and close	The Participant list displays  The demographics survey opens in a web browser  The Participant List tab displays	<input type="checkbox"/> Pass Fail <input type="checkbox"/>	
28.	Select <b>Survey Event 1</b> in the dropdown and <b>open the survey link for test3@test.com</b>  Email field: test3@test.com  <b>Save &amp; Return Later</b>  Close  Close the web page and return to the project	The survey opens in a web browser  Return code message displays  The Participant List tab displays	<input type="checkbox"/> Pass Fail <input type="checkbox"/>	The system shall support the following statuses for surveys: Incomplete (no data saved) Partial Survey Response Completed Survey Response
29.	Go to Add/Edit Records, and open record 3	The Record Home Page displays the instrument grid where	<input type="checkbox"/> Pass Fail <input type="checkbox"/>	

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	<p><b>Open the Demographics Event 1 form</b></p> <p><b>Open Survey in same event</b></p> <p><b>Go to Add/Edit records, and open record 3</b></p> <p>Open Survey in Event 1</p>	<ul style="list-style-type: none"> <li>• green circle with checkmark represents completed survey response</li> <li>• orange circle represents partial survey response</li> <li>• gray circle represents incomplete</li> </ul> <p>Message: Survey is read-only; Survey response was completed on [date time].</p> <p>Message: Survey response is editable; Response is only partial and is not complete. The survey return code is displayed.</p> <p>Form Status = Incomplete</p>		
30.	<p>Go to Survey Distribution Tools, Participant List tab</p> <p><b>Select Demographics Event 1</b></p> <p><b>Select Survey Event 1</b></p>	<p>Four emails are visible in the Email column. The test3@test.com shows a checkmark in a green circle in the Responded column.</p> <p>Three emails appear in the Email column. The test3@test.com shows a checkmark in an orange circle in the</p>	<p><input checked="" type="checkbox"/> <b>Pass</b></p> <p><b>Fail</b> <input type="checkbox"/></p>	

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	<b>Select Survey Event 2</b>	Responded column.  Three emails appear in the Email column. The test1@test.com and test2@test.com show a checkmark in a green circle in the Responded column.		
31.	Select Survey Event 1  <b>Compose Survey Invitations</b>  Complete the form as follows: When: Immediately Enable reminders: Not checked From: default email Subject: Test Participant List: Select test1@test.com  <b>Send</b>  Close  Close	Send a Survey Invitation... page displays three emails in the Participant List  Only test1@test.com remains checked in the Participant list  Message: Your emails are being sent  The Invitation Sent column displays a green arrow on the envelope icon for test1@test.com	<input type="checkbox"/> <b>Pass</b>  <b>Fail</b> <input type="checkbox"/>	Note to person validating: This invalid email will bounce back to your inbox.
32.	Go to Survey Invitation Log tab  <b>View past invitations</b>	The Survey Invitation Log page displays: <ul style="list-style-type: none"> <li>• Invitation send time</li> <li>• View Invite</li> <li>• Participant Email</li> <li>• Record</li> <li>• Participant Identifier</li> <li>• Survey</li> </ul>	<input type="checkbox"/> <b>Pass</b>	

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		<ul style="list-style-type: none"> <li>Survey Link</li> <li>Responded?</li> <li>Errors (if any)</li> </ul> <p>A row exists for the email sent in the previous step.</p>	<b>Fail</b> <input type="checkbox"/>	
33.	<p>Go to Project Setup</p> <p><b>Disable the designated email field</b></p> <p><b>Confirm Undesignate</b></p> <p>Go to Survey Distribution Tools, Survey Invitation Log tab</p> <p><b>View past invitations</b></p>	<p>Undesignated email field...</p> <p>Designate email field prompt turns red indicating no field is designated</p> <p>[no email listed] is displayed in the Participant Email column</p>	<p><input type="checkbox"/> <b>Pass</b></p> <p><b>Fail</b> <input type="checkbox"/></p>	
34.	<p>Go to Data Exports, Reports, and Stats</p> <p>Export raw data and open file (save is optional)</p>	Export file opens	<p><input type="checkbox"/> <b>Pass</b></p> <p><b>Fail</b> <input type="checkbox"/></p>	See 21_ExportDataExtraction_v1005.docx
35.	<p>Go to Edit instruments</p> <p>Open the Survey settings for the Survey instrument</p> <p>Delete Survey Settings</p> <p>Confirm delete</p> <p>Close</p>	<p>The Online Designer tab displays the list of instruments.</p> <p>The survey settings page displays</p> <p>Delete this instrument's survey settings?</p> <p>Survey successfully deleted!</p> <p>Return to Online Designer page</p> <p>The Enable button appears and no</p>	<p><input type="checkbox"/> <b>Pass</b></p> <p><b>Fail</b> <input type="checkbox"/></p>	

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		survey settings are visible for the Survey instrument		
36.	Go to Data Exports, Reports, and Stats  Export raw data and open file (save is optional)  Compare with the previous export	Export file opens  The survey_timestamp no longer appears, but the saved data is identical.	<input checked="" type="checkbox"/> Pass  Fail <input type="checkbox"/>	See 21_ExportDataExtraction_v1005.docx
37.	Go to Add/Edit Records and open record 2  Open Survey in Event 2	Record Home Page displays  No survey-related information is listed on the instrument	<input checked="" type="checkbox"/> Pass  Fail <input type="checkbox"/>	
38.	Go to Survey Distribution Tools, Participant List tab	Only the Demographics Event 1 is in the Participant List dropdown.	<input checked="" type="checkbox"/> Pass  Fail <input type="checkbox"/>	
39.	Logout as user1005_3	Successful logout	<input checked="" type="checkbox"/> Pass  Fail <input type="checkbox"/>	
	THIS ENDS THE TESTING FOR THIS SCRIPT			

**15 Direct Data Entry With Survey****Conclusion**

Did the Actual Results for each test step match the Expected Results listed?

**Yes**

No

**Comments/Additional Information:** (Indicate the step number of the step you wish to comment on.)**Completed By**

AM

**Date:**

16/04/2021