REDCap
Research Electronic Data Capture

Validation Test Script

4_Manage project creation, deletion and settings

System Setup

REDCap Version	LTS 10.0.5	**Application URL**	https://www.mc.vanderbilt.edu/victr/dcc/redcap/demos/
Browser Version	*Chrome 85.0*	**OS Version**	*Windows 10*
Actual Execution Time	*25 minutes*		
Instructions	Reference User Guide for Community User		

Test Summary

Feature Category Description: Project level management - *Control center and user interface features that allow the ability to create project and field metadata. Ability to open a project and move the project between statuses.*

Test Purpose Details: to validate project creation and modifications for draft and production statuses as allowed by specific user permissions including the enabling/disabling of longitudinal and survey functions

Functional Requirements: Manage project creation, deletion and settings

Control Center
- 4.2, 4.11 The system shall support the option to limit the creation of new projects to administrators.
- 4.3, 4.22 The system shall support the option to limit moving projects to production to the administrators.
- 4.4, 4.47 The system shall support enabling users to edit survey responses.
- 4.5, 4.56 The system shall allow production Draft Mode changes to be approved automatically under certain conditions.
- 4.6, 4.60 The system shall support the option to limit adding or modifying repeatable instruments while in production to administrators.
- 4.7, 4.61 The system shall support the option to limit adding or modifying events and arms while in production to administrators. Note: user can add instrument to event in production.

User Interface – General
- 4.15 The system shall support the ability to create new projects from a blank slate.
- 4.16 The system shall support customization of project titles.
- 4.16 The system shall support the designation of the purpose of the project.
- 4.18 The system shall support the ability to copy the project, all users, and all data during any project status.
- 4.21 The system shall support the ability to erase all data for a project at once only in development.
- 4.21, 4.29 The system shall support the ability to delete projects only in development for project users and in any status for administrators

User Interface – Longitudinal Project Settings
- 4.32 The system shall support enabling and disabling longitudinal data collection.
- 4.33 The system shall support the ability to designate data collection instruments for defined events in each arm.
- 4.34 The system shall support multiple study arms and the ability to define unique event schedules for each

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arm.
- ○ 4.37 The system shall support the ability to create repeating events and instruments within events.
- ○ 4.53 The system shall require administrators to delete events for longitudinal projects while in production.

User Interface – Survey Project Settings
- ○ 4.38 The system shall support enabling and disabling survey functionality at the project level.
- ○ 4.39 The system shall support enabling and disabling each data collection instrument in a project as a survey.
- ○ 4.42 The system shall support survey status as active or offline.
- ○ 4.37, 4.43 The system shall support the ability to create repeating surveys.

User Interface – Survey distribution
- ○ 4.44 The system shall allow creation of a public survey link when the survey is in the first instrument position.
- ○ 4.51 The system shall allow creation of a designated email field.

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		User Attributes (Control Center) -Reset user's email address to that of the person executing the script -Allow this user to create or copy projects = Yes
3.	user1005_3	1005_3Pswd	Will not be a user on the project	User Attributes (Control Center) -Reset user's email address to that of the person executing the script -Allow this user to create or copy projects = No

Project Setup Steps

ID	Description	Instructions
1.	Project: n/a	Project will be setup during script steps
2.	Project Setup: n/a	
3.	Data Import File Name: n/a	
4.	Other Files: n/a	

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Test Steps

Step #	Action Step	Expected Result	Pass / Fail	Comments
Help	You must perform the actions listed in this column.	After performing the actions in the 'Action Step' column, you should see the following.	Check 'Pass', if the actual results match the 'Expected Result'; otherwise, check 'Fail'.	Include unexpected results, suggestions. etc.
1.	Navigate to the validation website's REDCap log-in page Login as admin1005 and go to Control Center	User successfully logged into the system. Navigates to Home page. Control Center page appears.	☑ **Pass** **Fail** ☐	**See 1_RunConfiguration Check_v1005**

2.	Click 'User Settings' on the left navigation pane
	
	Confirm the two option settings for 'Allow normal users to create new projects?'
	  1) Yes, normal users can create new projects
	  2) 'No, only Administrators can create new projects
	
	Select 'No, only Administrators can create new projects'
	
	Save
		System-level User Settings page displays
		
		System configurations are saved.
			☐ **Pass**
			
			Fail ☐	

3.	Confirm the two option settings for 'Allow normal users to move projects to production?'
	  1) Yes, normal users can move projects to production
	  2) No, only can move projects to production
	
	Select 'No, only Administrators can move projects to production'
	
	Save
		System configurations are saved.	☐ **Pass**
			
			Fail ☐	

4.	Confirm the two option settings for 'Allow users to edit survey responses?' 1) Enabled 2) Disabled Select 'Disabled' Save		System configurations are saved.	☑ **Pass** **Fail** ☐
5.	Confirm options for 'Allow production Draft Mode changes...under certain conditions?' 1) Never, always require admin... 2) Yes, if no existing fields were modified 3) Yes, if project has no records OR if records and no existing fields modified 4) Yes, if no critical issues exist 5) Yes, if project has no records OR if records and no critical issues exist Select #1, 'Never, always require admin...' Save		System configurations are saved.	☑ **Pass** **Fail** ☐
6.	Confirm options for 'Allow normal users to modify the 'Repeatable Instruments & Events'...while in production status?' 1) Yes, normal users can modify the repeatable instance setup in production 2) No, only Administrators can modify the repeatable instance setup in production Select 'No, only Administrators can modify the repeatable instance setup in production' Save		System configurations are saved.	☑ **Pass** **Fail** ☐
7.	Confirm options for 'Allow normal users to add or modify events and arms...while in production status?' 3) Yes, normal users can add/modify events in production 4) No, only Administrators can add/modify events in production Select 'No, only Administrators can add/modify events in production'		System configurations are saved.	☑ **Pass**

	Save		**Fail** ☐	
8.	Click Browse Users on the left navigation pane Search and select user1005_3	Browse Users page displays The individual user information page displays. In the user attributes section, the "Allow this user to create or copy projects is "No."	☐ **Pass** **Fail** ☐	**See 2_Add Manage Users**
9.	Logout as admin1005 Login as user1005_3	Logout successful Login successful New Project tab is <u>not</u> visible	☐ **Pass** **Fail** ☐	user1005_3 does not have permission to request a new project
10.	Logout as user1005_3 Login as user1005_1	Logout successful Login successful New Project tab <u>is</u> visible	☐ **Pass** **Fail** ☐	
11.	Go to New Project tab Cancel	The Create project page has a Send Request button. Project not requested.	☒ **Pass** **Fail** ☐	User1005_1 may request a project but not create one
12.	Logout as user1005_1 Login as admin1005	Successful logout Successful login	☐ **Pass** **Fail** ☐	
13.	Go to Control Center, User Settings page. Allow normal users to create new projects, select: Yes, normal users can create new projects Save	System-level User Settings page displays Your system configuration values have now been changed!	☑ **Pass** **Fail** ☐	
14.	Logout as admin1005 Login as user1005_1	Logout successful Login successful	☐ **Pass** **Fail** ☐	
15.	Go to New Project tab Project Title: 1005_FirstProject Purpose: Operational Support Start project: Create an empty project	The Create project page has a Create Project button.	☐ **Pass** **Fail** ☐	User1005_1 has permissions to create a new project Note: User has project design and

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	Create Project and confirm	Message box confirms new project created. Focus moves to new project.user		setup, user rights, and data access groups by default.
	Go to User Rights Add admin1005 to the project	User successfully added		
	-------------- If this is user1005_1's first activity, you will be prompted to Set Up Password Recovery Question. This is not part of core, but will satisfy the REDCap login sequence. Select question, "What is your childhood nickname?" Answer: REDCap Save and Close	Password Recovery screen closes.		
16.	On Project Setup page, click the 'Modify project title, purpose, etc.' button. Edit: Project title: FirstProject_1005 Purpose of this project: Practice/Just for fun Save	Modify Project Settings page displays. Message: Success! Your changes have been saved.	☑ **Pass** **Fail** ☐	
17.	Go to Online Designer Open My First Instrument Add Field Type: Text Box Field Label: Name Variable Name: ptname Save	Online Designer tab displays The Record ID variable appears The field saves successfully and appears on My First Instrument	☑**Pass** **Fail** ☐	
18.	Return to list of instruments Choose action: Copy Copy instrument	Data Collection Instruments page displays Copy instrument page displays and names the instrument 'My First Instrument 2' Message: Success! The instrument was...created...	☑ **Pass** **Fail** ☐	

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19.	Open 'My First Instrument 2' Add Field Field type: Text Field Label: Email Variable Name: email Validation: Email Save	My First Instrument 2 displays The field saves successfully and appears on My First Instrument 2.	☑ **Pass** **Fail** ☐	
20.	Go to Project Home Go to Other Functionality tab	Project Home page displays Other Functionality page displays	☑ **Pass** **Fail** ☐	

21.	Copy the project
	
	Project title: ProjectCopy_1005
	
	Also copy the following: select all options
	
	Copy Project and confirm
	
	Verify 1-3
		Make a Copy of the Project page displays
		
		Message: Copy Successful!
		
		1: User1005_1 is a user on the project
		2: No records exist
		3: Other Functionality tab
		  -Delete the project button is available
		  -Erase all data button is available
			☑ **Pass**
			
			Fail ☐
				User1005_1 has permission to delete all existing data and delete the project while in development.

22.	Go to Project Setup, Move project to production Keep existing data or delete: Keep all data Cancel	Move Project To Production Status page displays The Request Admin to Move to Production Status button is available. Project is not moved to production.	☑ **Pass** **Fail** ☐	User1005_1 is not an administrator and may only request a project be moved to production.
23.	Logout as user1005_1 Login as admin1005	Successful logout Successful login	☑ **Pass** **Fail** ☐	
24.	In Control Center, User Settings Allow normal users to move projects to production?: Yes, normal users can move projects to production Save	System-level User Settings page displays Your system configuration values have now been changed!	☑ **Pass** **Fail** ☐	

25.	Logout as admin1005 Login as user1005_1	Logout successful Login successful	☑ **Pass** **Fail** ☐	
26.	Go to My Projects and open ProjectCopy_1005 In Project Setup, Move project to production Keep existing data or delete: Keep all data Move to production and confirm	ProjectCopy_1005 project setup page displays The Move to Production Status button is available. Success! The project is now in production.	☑ **Pass** **Fail** ☐	User1005_1 now has permission to move projects to production.
27.	Go to Other Functionality tab	Other Functionality page displays Delete project option is not available. User cannot delete production project. Rather, the Request delete project is available. The Erase all data button is not visible.	☑ **Pass** **Fail** ☐	User1005_1 is not an administrator and may not delete a production project or delete its data.
28.	Logout as user1005_1 Login as admin1005	Successful logout Successful login ProjectCopy_1005 project displays	☑ **Pass** **Fail** ☐	
29.	In Other Functionality tab, verify the Delete the project and Erase all data buttons are present. Delete the project Cancel	The Delete the project and Erase all data buttons are available. Permanently delete this project confirmation page displays. Project is not deleted	☑ **Pass** **Fail** ☐	
30.	Delete the project again Complete the required "delete" field and delete Confirm the deletion as prompted Close	Permanently delete this project confirmation page displays. Message: Project successfully deleted! Return to My Projects page	☑ **Pass** **Fail** ☐	Administrator may delete production project.

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31.	Logout as admin1005 Login as user1005_1	Logout successful Login successful	☑ **Pass** **Fail** ☐	
32.	Go to My Projects and open FirstProject_1005 In Project Setup, Main project settings section Enable 'Use longitudinal data collection...' Disable 'Use longitudinal data collection...' Enable 'Use longitudinal data collection...'	FirstProject_1005 displays The Enable button appears next to the red dash circle for 'Use longitudinal data collection...' Disable button appears next to the green checkmark circle for 'Use longitudinal...' The project is longitudinal. The Enable button appears next to the red dash circle for 'Use longitudinal data collection...' The project is not longitudinal. Disable button appears next to the green checkmark circle for 'Use longitudinal...' The project is longitudinal.	☑ **Pass** **Fail** ☐	Tests toggling the longitudinal project on and off.
33.	In Design your data collection instruments section, click Define My Events Add new event to Arm1: Event 2	Define My Events tab displays Arm1 tab displays Event Name as 'Event 1' Event 2 appears in Arm 1	☑ **Pass** **Fail** ☐	
34.	Add New Arm Arm name: Arm 2 Save Add new event: Event 1	Arm 2 page displays a message 'No events have been defined for this Arm' Event 1 appears in Arm 2	☑ **Pass** **Fail** ☐	
35.	Go to Designate Instruments for My Events tab, Arm 1 Begin Editing Mark the checkbox in Event 1 next to: My First Instrument and My First Instrument 2 Save	Arm 1 tab displays Checkmarks are saved next to each instrument in Event 1	☑ **Pass** **Fail** ☐	

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36.	Go to Arm 2 tab Begin Editing: Mark the checkbox in Event 1 next to: My First Instrument Save	Arm 2 tab displays Checkmark is saved next to My First Instrument in Event 1	☑ **Pass** **Fail** ☐	
37.	Go to Project Setup, In Enable optional modules and customizations section: Enable 'Repeatable instruments and events In the dropdown for Event 1 Arm 1, select 'Repeat Instruments' Mark the checkbox next to My First Instrument 2 In the dropdown for Event 1 Arm 2, select 'Repeat Entire Event' Save	The Enable button appears next to the red dash circle for 'Repeatable instruments and events' The Repeatable instruments and events page displays. Message: Your settings...have been successfully saved! Modify button appears next to the green checkmark circle for 'Repeatable instruments ...'	☑ **Pass** **Fail** ☐	
38.	In Project Setup Enable surveys in the project Disable surveys in the project Enable surveys in the project	The Enable button appears next to the red dash circle for 'Use surveys in this project.' Disable button appears next to the green checkmark circle for 'Use surveys...' Surveys are enabled. The Enable button appears next to the red dash circle for 'Use surveys in this project.' Surveys are disabled. Disable button appears next to the green checkmark circle for 'Use surveys...' Surveys are enabled.	☐**Pass** **Fail** ☐	Tests toggling the surveys on and off.
39.	Go to Online Designer	Data Collection Instruments page displays The Enable button appears in the Enabled a survey column for all instruments.	☑**Pass** **Fail** ☐	

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	Enable My First instrument Save	The survey set up page displays. Message: Your survey settings were successfully saved! Survey symbol replaces Enable button.		
40.	Click Survey settings Scroll to bottom and Delete Survey Settings Confirm and close	The survey set up page displays. Message: Survey successfully deleted! Enable button is visible	☑Pass Fail ☐	
41.	Enable My First instrument Save	Message: Your survey settings were successfully saved! Survey symbol replaces Enable button.	☑Pass Fail ☐	
42.	Click Survey settings Change status to Survey Offline Save Confirm and close	The survey set up page displays. Survey Status is Survey Active. Message: Survey settings successful! Survey symbol is visible	☑Pass Fail ☐	
43.	Click Survey settings Change status to Survey Active Save	The survey set up page displays. Survey Status is Survey Offline. Message: Your survey settings were successfully saved!	☑Pass Fail ☐	
44.	Click Survey Distribution Tools Open Public Survey link Submit and Close	Survey Distribution Tools page displays My First Instrument survey opens as web page. Survey Distribution Tools page displays	☑Pass Fail ☐	
45.	Click Add/Edit Records in left side-bar and choose the existing record Select My First Instrument with the green checkmark.	Record Home page displays Survey response is read-only message appears on My First instrument page.	☑ Pass Fail ☐	
46.	Logout as user1005_1 Login as admin1005	Successful logout Successful login	☑ Pass Fail ☐	

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47.	Go to Control Center, User Settings Allow users to edit survey responses, select: Enabled Save	System-level user Settings page Message: Your system configuration values have now been changed!	☑ **Pass** **Fail** ☐	
48.	Logout as admin1005 Login as user1005_1	Successful logout Successful login	☑ **Pass** **Fail** ☐	
49.	Go to My Projects and open FirstProject_1005 In User Rights, edit user privileges for user1005_1 In Data Entry Rights, check the Edit survey responses. Save	The project opens The Editing existing user page displays. Message: The user1005_1 was successfully edited!	☐ **Pass** **Fail** ☐	
50.	Click Add/Edit Records in left side-bar and choose the existing record Open My First Instrument with the green checkmark.	Record Home page displays Survey response is editable and the Edit response button is available.	☐ **Pass** **Fail** ☐	User1005_1 has rights to edit a survey response
51.	Go to Project Setup, Enable optional modules and customizations section. Enable the 'Designate an email field...' Choose [email] field Save	The Enable button appears next to the red dash circle for 'Designate an email field...' The Designate an email field...' page displays. Disable button appears next to the green checkmark circle for 'Designate an email field...'	☑ **Pass** **Fail** ☐	
52.	In Project Setup, Move project to production Keep existing data or delete: Keep all data Confirm move to production	Move Project To Production Status page displays Message: Success! The project is now in production.	☑ **Pass** **Fail** ☐	
53.	In Project Setup, open Online Designer Enter Draft Mode	The option to enter draft mode is displayed. The list of instruments page is displayed.	☐ **Pass** **Fail** ☐	Only administrators may delete events while in production.

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	Go to Project Setup, open Define My Events Verify no options exist to delete an event.	No option to delete an event exists in any arm.		
54.	In Project Setup, open Online Designer (still in draft mode) Open My First Instrument Add a new field anywhere on the instrument Field type: Text Field Label: Text2 Variable: text2 Save Submit Changes for Review Confirm submission	The Submit Changes for Review button is available. The new Text2 field appears on the instrument. Submit Changes for Review confirmation message appears Message: Awaiting review of project changes text displays on page.	☑ **Pass** **Fail** ☐	All production changes must be approved by an administrator.
55.	Logout as user1005_1 Login as admin1005	Successful logout Successful login The Review Changes box displays at top.	☑ **Pass** **Fail** ☐	
56.	Click Project Modification Module Remove All Drafted Changes and confirm	Project Modification Module displays. Project Changes Removed/User Notified page displays.	☑ **Pass** **Fail** ☐	
57.	Go to Control Center, User Settings 'Allow production Draft Mode changes to be approved automatically...', select: Yes, if project has no records OR if records and no critical issues exist. Save	System-level User Settings page is displayed Your system configuration values have now been changed!	☑ **Pass** **Fail** ☐	
58.	Logout as admin1005 Login as user1005_1	Successful logout Successful login	☑ **Pass** **Fail** ☐	

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#	Action	Expected Result	Pass/Fail	Notes
59.	Go to My Projects and open FirstProject_1005 In Project Setup, open Online Designer and Enter Draft Mode Open My First Instrument Add a new field anywhere on the instrument Field type: Text Field Label: Text2 Variable: text2 Save Submit Changes for Review Confirm submission and close	The project opens The Submit Changes for Review button is available. The new Text2 field appears on the instrument. Message: Success! The changes ...were made automatically.	☐ Pass Fail ☐	
60.	In Project Setup, open Online Designer and Enter Draft Mode Go to Project Setup and scroll down to Enable optional modules and customizations. Verify the Repeatable instruments and events "Modify" button is disabled. Open Define My Events	The Submit Changes for Review button is available. The "Modify" button next to the Repeatable instruments and events option is disabled. Events cannot be modified in production status... displays on the Define My Events page.	☒ Pass Fail ☐	User1005_1 cannot modify repeatable instruments or events while in production.
61.	Go to Designate Instruments for My Events tab	Events cannot be modified in production status... displays on the Define My Events page.	☒ Pass Fail ☐	User1005_1 cannot change designation of instruments while in production.
62.	Logout as user1005_1 Login as admin1005	Successful logout Successful login	☐ Pass Fail ☐	
63.	Go to Control Center, User Settings Allow normal users to modify the 'Repeatable Instruments & Events' ... while in production status, Select: Yes normal users can modify the repeatable instance setup in production. Allow normal users to add or modify events	System-level User Settings page displays	☒ Pass Fail ☐	

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	Action	Expected Result	Result	
	and arms...while in production, Select: Yes, normal users can add/modify events in production. Save	Message: Your system configuration values have now been changed!		
64.	Logout as admin1005 Login as user1005_1	Successful logout Successful login	☑ **Pass** **Fail** ☐	
65.	Go to My Projects and open FirstProject_1005 Go to Project Setup, Enable optional modules and customizations. Modify Repeatable instruments and events: Change any setting in the form. Cancel	Project opens The Repeatable instruments and events displays and can be edited. Return to Project Setup		
66.	Open Define My Events In Arm 1, add new event: Event 3	Define My Events page displays Event 3 appears in the event list.	☑ **Pass** **Fail** ☐	
67.	Click Add New Arm tab Arm name: Arm 3 Save	Page shows option to add new arm Arm 3 tab appears	☑ **Pass** **Fail** ☐	
68.	Move to Arm 1 Edit Event 3 Event Name: Event Three Save	Arm 1 grid appears Save button appears and the event name becomes editable. Event Three is saved	☑ **Pass** **Fail** ☐	
69.	Move to Arm 2 Rename Arm 2 Arm name: Arm Two Save	Arm 2 grid appears Page appears with arm name field editable Arm Two is saved	☑ **Pass** **Fail** ☐	
70.	Go to Project Setup, Online Designer Submit Changes for Review and confirm	Submit Changes for Review button is available Message: Success! The changes	☑ **Pass** **Fail** ☐	

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		…were made automatically.		
71.	Confirm 1 record and 2 instruments exist Logout as user1005_1	1 record and 2 instruments exist Successful logout	☑ Pass Fail ☐	
	THIS ENDS THE TESTING FOR THIS SCRIPT THIS SCRIPT IS THE FOURTH OF SEVEN SCRIPTS MEANT TO BE DONE IN ORDER.			

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	_(signature)_	Date: 2DEC20