
Communauté des Data Managers du GIRCI IDF

Réunion #9 / Alertes & notifications


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Le mercredi 11 février (visioconférence)

SOMMAIRE

- 1. Introduction (5 min)**
- 2. Types d'alertes (10 min)**
- 3. Paramétrages (20 min)**
- 4. Retours d'expérience (15 min)**
- 5. Discussion (10 min)**

Notifications & Alertes

- Email envoyé automatiquement par REDCap
 - À des utilisateurs REDCap identifiés dans le projet
 - En fonction de critères ou actions dans REDCap
-  à définir selon le design de l'étude et en accord avec l'équipe projet

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Types d'alertes

Alertes de démarrage d'étude

- ❖ À la création d'un dossier (Add Records)
- ❖ À la validation d'une inclusion
- ❖ Au résultat d'une randomisation

Types d'alertes


Alertes évènements

- ❖ À la déclaration d'un évènement indésirable
 - ✓ Ou uniquement selon la gravité de celui-ci
- ❖ Au remplissage d'un formulaire de notification EIG
 - ✓ Ou au moment de sa validation
- ❖ Au remplissage d'un formulaire de notification de grossesse

Types d'alertes

Alertes de fin d'étude

- ❖ Si sortie prématurée ou protocolaire de l'étude
- ❖ À la validation du formulaire de Validation par l'investigateur

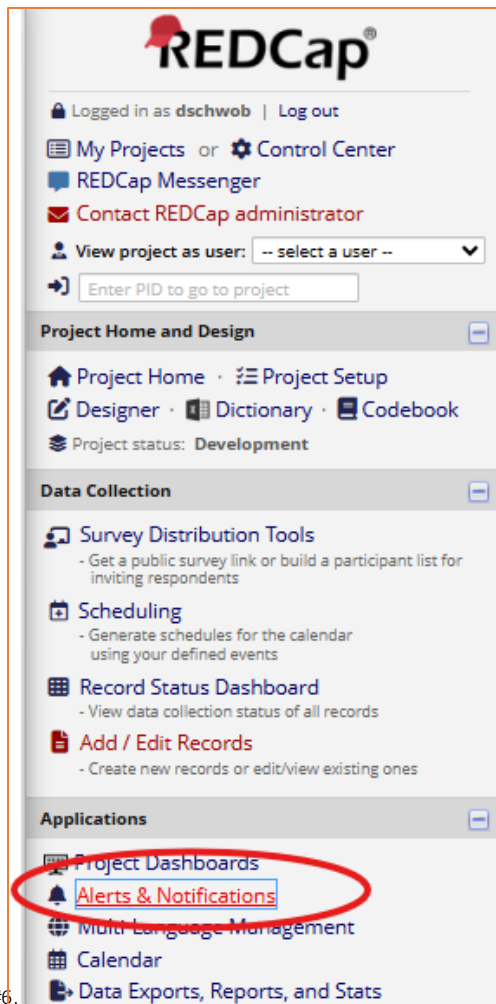
 paramétrer autant d'alertes que nécessaire en accord avec l'équipe projet

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Paramétrage des notifications

Module Alerts & Notifications



REDCap®

Logged in as dschwob | Log out

My Projects or Control Center

REDCap Messenger

Contact REDCap administrator

View project as user: -- select a user --

Enter PID to go to project

Project Home and Design

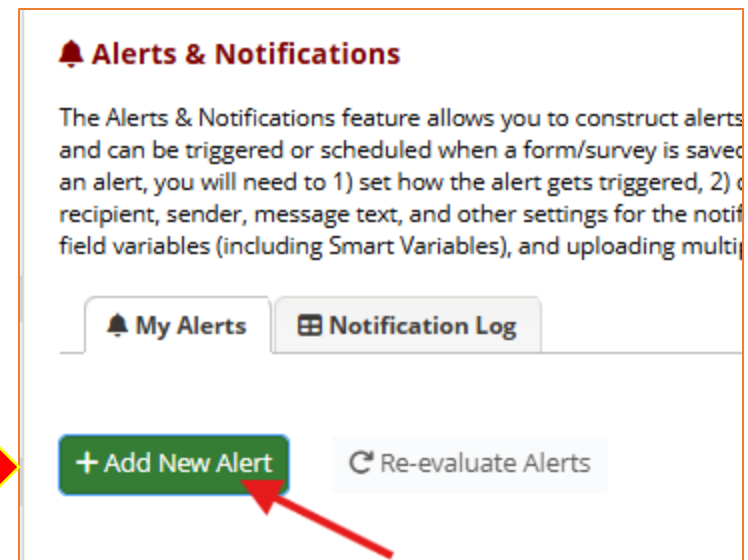
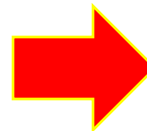
- Project Home · Project Setup
- Designer · Dictionary · Codebook
- Project status: Development

Data Collection

- Survey Distribution Tools
 - Get a public survey link or build a participant list for inviting respondents
- Scheduling
 - Generate schedules for the calendar using your defined events
- Record Status Dashboard
 - View data collection status of all records
- Add / Edit Records
 - Create new records or edit/view existing ones

Applications

- Project Dashboards
- Alerts & Notifications**
- Multi-Language Management
- Calendar
- Data Exports, Reports, and Stats



🔔 Alerts & Notifications

The Alerts & Notifications feature allows you to construct alerts and can be triggered or scheduled when a form/survey is saved. To set up an alert, you will need to 1) set how the alert gets triggered, 2) choose a recipient, sender, message text, and other settings for the notification, and 3) select which field variables (including Smart Variables), and uploading multiple files.

🔔 My Alerts 📅 Notification Log

+ Add New Alert ↻ Re-evaluate Alerts

Paramétrage des notifications

Titres pour identifier les alertes

Create new alert

You may define the settings for your alert in Steps 1-3 below. After clicking the Save button and may be triggered at any time thereafter. If you would like to remove or stop using an existing alert at any time, even after some notifications have already been sent or scheduled.

Title of this alert:

+ Add New Alert Re-evaluate Alerts

Alert #1: Etude PROBCLUSTER - REDCap : Ale... Edit Options -
Unique Alert ID: A-62

If the following logic is TRUE when the Instrument "Randomisation [Any Event]" is saved and has any form status: `{inclusion_arm_1}{rando_on}=1`

Send Immediately

Send one time (only once per record - i.e., never re-trigger)

Activity: 20 records were alerted (view list) Last sent: 23/01/2026 08:27

Alert #2: Etude PROBCLUSTER - REDCap : Ale... Edit Options -
Unique Alert ID: A-63

If the following logic is TRUE when the Instrument "Validation Investigateur (FIN ETUDE)" is saved and has any form status: `{valid_saisie_inv_on} = '1' and {validation_investigateur_complete} = '2'`

Send Immediately

Send one time (only once per record - i.e., never re-trigger)

Activity: 3 records were alerted (view list) Last sent: 22/01/2026 09:39

Alert #3: Etude PROBCLUSTER - REDCap : Not... Edit Options -
Unique Alert ID: A-64

When the following logic becomes TRUE during data import or data entry: `{evenements_indexir_arm_1}{gravite_ei}=1`

Send Immediately

Send one time (only once per event in a record and also on every instance of a repeating instrument/event)

Activity: 15 records were alerted (view list) Last sent: 28/01/2026 09:08


Alert #4: Etude PROBCLUSTER - REDCap : Not... Edit Options -
Unique Alert ID: A-65

If the following logic is TRUE when the Instrument "Formulaire de Notification EIG [Any Event]" is saved and has any form status: `{date_transmission_eig}<' ' and {sig_initial_sulvi}=1 and {diagnostic}<' '`

Send Immediately

Send one time (only once per event in a record and also on every instance of a repeating

me active
modify an

 bien nommer ses alertes pour les retr
modification ou d'inactivation

de

Paramétrage des notifications

Conditions d'exécution de la règle

❖ À la sauvegarde d'un formulaire

STEP 1: Triggering the Alert

A) How will this alert be triggered?

When a record is saved on a specific form/survey*

If conditional logic is *TRUE* when a record is saved on a specific form/survey*

When conditional logic is *TRUE* during a data import, data entry, or as the result of time-based logic ⓘ

B) Trigger the alert...

when is saved with any form status (excludes data imports)

C) Trigger Limit: Trigger the alert...

(The trigger limit determines where and to what extent within a record that the alert will be triggered.)

* The alert will not be re-triggered if the form/survey is saved again, unless it is set to send Every time in Step 2 below.

Paramétrage des notifications

Conditions d'exécution de la règle

❖ En fonction d'une condition

🔧 STEP 1: Triggering the Alert

- A) How will this alert be triggered?
- When a record is saved on a specific form/survey*
 - If conditional logic is *TRUE* when a record is saved on a specific form/survey*
 - When conditional logic is *TRUE* during a data import, data entry, or as the result of time-based logic ⓘ

B) Trigger the alert...

when is saved with any form status (excludes data imports)

while the following logic is true:

(e.g., [enrollment_arm_1][age] > 30 and [enrollment_arm_1][sex] = "1")

[How to use 'stop logic' to disable a scheduled alert](#)

Ensure logic is still true before sending notification?

C) Trigger Limit: Trigger the alert...

(The trigger limit determines where and to what extent within a record that the alert will be triggered.)

* The alert will not be re-triggered if the form/survey is saved again, unless it is set to send Every time in Step 2 below.

Paramétrage des notifications

Nombre d'alertes par évènement/patient

❖ Cas des instruments ou events répétés

C) Trigger Limit: Trigger the alert... only once per record (i.e., never re-trigger) ▼

(The trigger limit determines where and how often the alert is triggered.)

* The alert will not be re-triggered if the following condition is met:

- only once per record (i.e., never re-trigger)
- only once per instrument regardless of the event in a record
- only once per event in a record
- only once per event in a record and also on every instance of a repeating instrument/event

🕒 STEP 2: Set the Alert Schedule

Paramétrage des notifications

Timing de l'envoi

🕒 STEP 2: Set the Alert Schedule

When to send the alert?

- Send immediately
- Send on next at time H:M
- Send the alert days hours minutes
 the exact time that the alert was triggered
- Send at exact date/time:

Send it how many times?

- Just once
- Multiple times on a recurring basis:
 - Send every days after initially being sent.
Tip: A monthly recurrence can be approximated as 30.44 days.
 - Send up to times total (including the first time sent).
Leave blank to continue sending forever.

Alert expiration:
(optional)

This alert will be auto-deactivated at the specified date/time above. Note: This will cause any already-scheduled notifications not to be sent after the expiration time.

Paramétrage des notifications

Destinataires et mode d'envoi

❖ EMail des utilisateurs REDCap déclarés dans le projet

STEP 3: Message Settings

Alert Type: Email SMS Text Message Voice Call SendGrid Template

Email From: * must provide value
Display name (optional) dschwob@for.paris

Email To: * must provide value
Select recipients
[+ Show more options](#)
Or manually enter emails: jane@example.com; john@mysite.org

Subject * must provide value

👉 destinataires des alertes à définir en amont avec l'équipe projet

👉 Il est aussi possible de définir des alertes par DAG

Paramétrage des notifications

Contenu du message d'alerte

❖ Définir un message clair et explicite

- ❖ Objet
- ❖ Contenu
- ❖ Mise en forme

Message:
** must provide value*

Open Sans Paragraph 10pt B I U ABC A [brush] [bulleted list] [numbered list] [indent] [outdent] [table] [code] [link] [unlink] [image] [link icon] [search] [link icon] [undo] [redo] [source code]

👉 Utiliser les Smartvariables de REDCap pour préciser le numéro du patient concerné par l'alerte

- [record-name]
- [user-fullname]
- [record-dag-id]

Archivage

Log des envois

❖ REDCap conserve la trace des actions effectuées

View Notification - Alert #1 (Unique Alert ID: A-62) ✕

From: dschwob@for.paris

To: dschwob@for.paris

Subject Etude ██████████ REDCap : Alerte création de dossier patient - Patient 01-001 (TEST)

Message: Bonjour,

Le dossier patient 01-001 vient d'être créé par ██████████ du centre dans l'étude F█████████ (TEST).

Cordialement,

L'équipe Data Management HFAR

Close

Archivage

Log des envois

❖ Aussi dans le module Email logging

Search all outgoing emails for this project

Search for in

Type:

Pertaining to a specific record:

Search within a window of time from to

il Logging
email - i.e.,
ent to the
page and the
it is using Data
emails).

3 matching results

View msg	Time sent	Record	Summary email content and attributes <small>(click icon on left to view full email)</small>
	03.11.2025 16:27	01-001	From: dschwob@for.paris, To: dschwob@for.paris Subject: Etude P... - REDCap : Notification formulaire EIG - Patient 01-001 (TEST) Bonjour, Un formulaire EIG (1) pour le patient 01-001 du centre a été déclaré par ... dans l'étude P...
	23.10.2025 15:31	01-001	From: dschwob@for.paris, To: dschwob@for.paris Subject: Etude P... - REDCap : Notification EI Grave - Patient 01-001 (TEST) Bonjour, Un formulaire EIG (1) pour le patient 01-001 du centre a été initié par Dominique Ser... dans l'étude PR...
	21.10.2025 14:48	01-001	From: dschwob@for.paris, To: dschwob@for.paris Subject: Etude P... - REDCap : Alerte création de dossier patient - Patient 01-001 (TEST) Bonjour, Le dossier patient 01-001 vient d'être créé par C... du centre dans l'étude P... (T...

FAQ

Bugs / vérifications paramètres globaux

➤ Vérifier les paramètres dans le Control Center

Protected Email Mode

This setting prevents identifying data (PHI/PII) from being sent in outgoing emails for alerts, survey invitations, and survey confirmation emails. If enabled, either A) all alerts, survey invitations, and survey confirmation emails or B) those whose email body is attempting to pipe data from Identifier fields will be affected, in which **it will not send the full email text to the recipient but will instead send a surrogate email containing a link that leads them to a secure REDCap page to view their original email**. If they are accessing an email in the Protected Email Mode for the first time (or in more than a month), it will send a security code to their inbox that will allow the recipient to view any protected emails for up to 30 days on that same device. Note that the Protected Email Mode will not apply to alerts that utilize sendgrid template emails because these emails cannot be fully rendered in the REDCap web application.

1) Should the Protected Email Mode operate on all alerts, survey invitations, and survey confirmation emails, or only on those whose email body is piping data from Identifier fields?

All alerts, survey invitations, and survey confirmation emails ▼

2) Optional custom text to display in the email header and page header seen by the recipient. Default text: *REDCap Secure Messaging*.

REDCap Secure Messaging

HTML may be used to add images, links, or styled text. For example:
VUMC Study

3) Optional custom logo to display in the email header and page header seen by the recipient. (Will be displayed above the custom text.)

Upload custom logo:

Choisir un fichier

Aucun fichier choisi

FAQ

Bugs / vérifications paramètres globaux

Alerts & Notifications

The settings below can be used to restrict the ability for users to send alerts to certain email addresses on the Alerts & Notifications page in all projects. This allows some institutions to be more restrictive if they have concerns about users using this functionality (intentionally or maliciously) in a way that might threaten regulatory compliance or privacy laws/regulations, such as piping sensitive data into an alert's email message and sending it to a non-project user.

Email-related options:

Allow normal users to use project variables for email fields in the project for an alert's To, CC, or BCC?

Yes, allow normal users to use this

If set to 'Yes', then users will be able to choose email-validated text fields in the multi-select when setting an alert's To, CC, or BCC. Administrators will always be able to do this in a project regardless of this setting.

Allow normal users to manually enter email addresses as freeform text for an alert's To, CC, or BCC?

Yes, allow normal users to use this

If set to 'Yes', then users will be able to manually type *any* email address for an alert's To, CC, or BCC. Administrators will always be able to do this in a project regardless of this setting.

Optional: Domain allowlist for email addresses that are manually entered as freeform text (via option above)

If the option immediately above is set to 'Yes', you may optionally limit the kinds of email addresses that can be entered as an alert's To, CC, or BCC by specifying one or more domain names (e.g., vanderbilt.edu) that will serve as an allowlist of the only acceptable domains that email addresses may have for an alert. If an email with another domain is entered by a user, it will display an error and will not accept it.

Expand

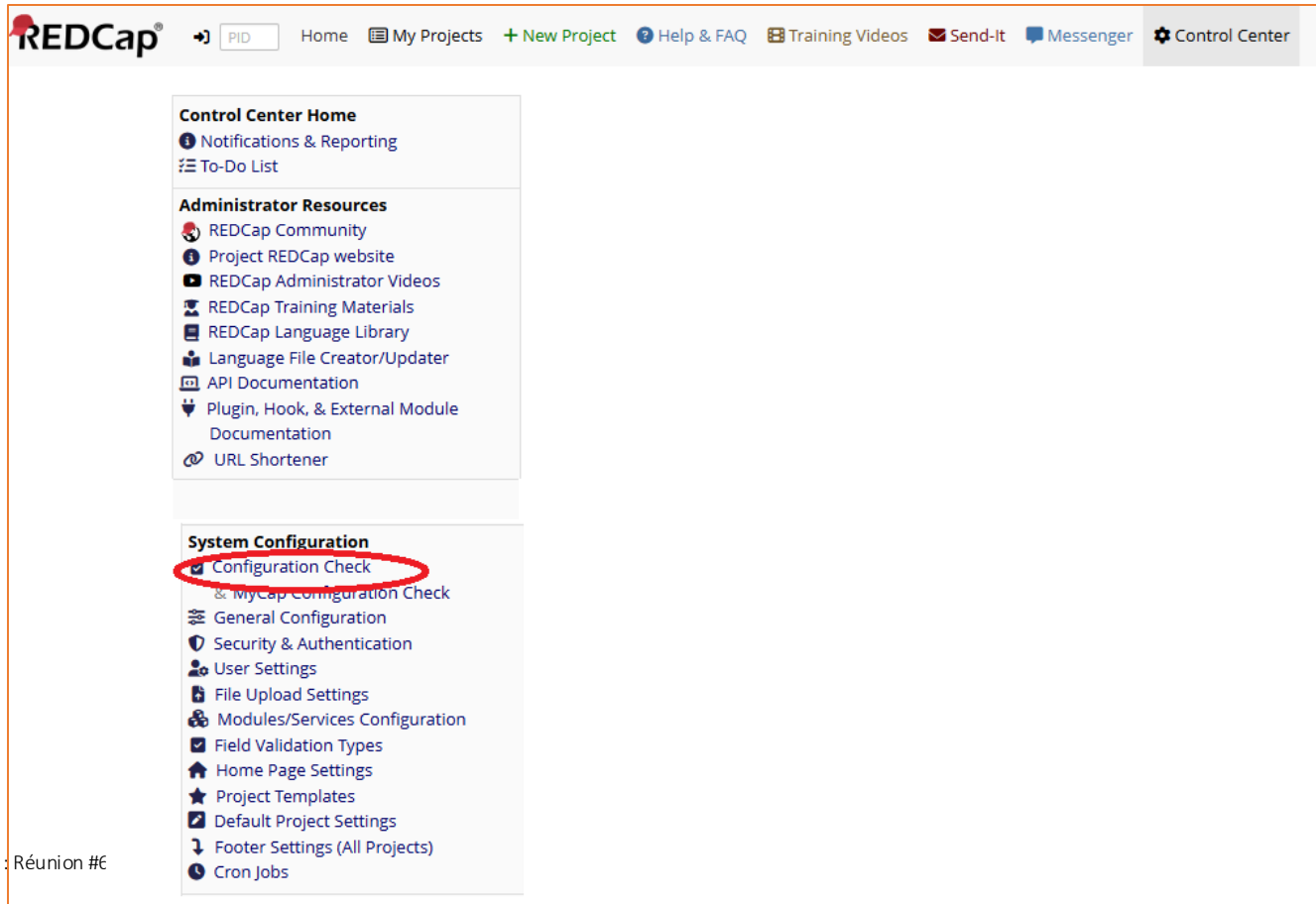
Separate each domain on a different line. See example below.

```
vanderbilt.edu
mc.vanderbilt.edu
mmc.edu
```

FAQ

Bugs / vérifications paramètres globaux

- Utiliser le vérificateur des paramétrages de REDCap



The screenshot displays the REDCap Control Center interface. The top navigation bar includes the REDCap logo, a search box for PID, and links for Home, My Projects, New Project, Help & FAQ, Training Videos, Send-It, Messenger, and Control Center. The main content area is divided into three sections: Control Center Home, Administrator Resources, and System Configuration. The System Configuration section is highlighted with a red circle, and the 'Configuration Check' option is also circled in red. The 'Configuration Check' option is accompanied by a checkmark icon and the text '& MyCap Configuration Check'.

Control Center Home

- Notifications & Reporting
- To-Do List

Administrator Resources

- REDCap Community
- Project REDCap website
- REDCap Administrator Videos
- REDCap Training Materials
- REDCap Language Library
- Language File Creator/Updater
- API Documentation
- Plugin, Hook, & External Module Documentation
- URL Shortener

System Configuration

- Configuration Check & MyCap Configuration Check
- General Configuration
- Security & Authentication
- User Settings
- File Upload Settings
- Modules/Services Configuration
- Field Validation Types
- Home Page Settings
- Project Templates
- Default Project Settings
- Footer Settings (All Projects)
- Cron Jobs

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Discussion

Prochaines sessions

 **Vendredi 20 Février 14h-15h**

➤ Matrice des droits

 **Jeudi 12 Mars 09h-12h30**

➤ Présentiel

Merci pour votre attention

Suivez les actualités du GIRCI IDF :



Site Web : <https://girci-idf.fr/>



Linkedin : <https://www.linkedin.com/company/girci-idf/>