ECTU Central Office SOP_REDCap_12: Assigning Access to the REDCap API

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Caroline Garth, QA Manager	QA Authorisation	09 Feb 2022	See retained approval email dated 09 Feb 2022

Document Revision History		
Version No.	Effective Date	Summary of Revisions
1.0	23 Feb 2022	Initial creation

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1.0 PURPOSE

This Standard Operating Procedure (SOP) describes the process of granting REDCap API rights for projects requiring API access.

2.0 SCOPE

This SOP applies to all databases developed by ECTU using the REDCap system where the API access to REDCap is controlled and maintained by ECTU staff.

3.0 RESPONSIBILITIES

The tasks in this SOP are the responsibility of ECTU Data Management & Programming Team staff involved in developing projects using REDCap and the REDCap API.

4.0 PROCEDURE

4.1. The project specification must include the reason for use of the API, e.g. randomisation system using stratification or minimisation

4.2. **Initial Set Up Procedures**

4.2.1 In the training database, assign the user **ectu.redcap** to the project. Remove all permissions apart from the following:

- API export
- API import/update permissions

Ensure that all data viewing rights are set to 'No access (hidden)'

4.2.2 Log in to REDCap using the **ectu.redcap** user details (available to ECTU DM&P team members only) and access the relevant REDCap project

4.2.3 Select 'API' or 'API Playground' from the left menu and select 'Create API token now'

4.2.4 The project's assigned senior software developer must be provided access to the following information:

- API token generated from step 4.2.3
- The project's project ID (PID) found at the top of the project home page
- The field labels and codes for the project's API trigger (e.g. the randomise now field or similar trigger for the API)

The senior software developer may also be provided with data entry rights to the training database to allow them to access the project codebook.

4.2.5 Enable the data entry trigger by navigating to 'Additional Customizations' on the Project Setup page. Tick the 'Data Entry Trigger' checkbox. The senior software developer will provide the URL of the website to be entered in the 'URL of website' field.

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4.2.6 Test the API functionality as part of the project's overall testing and validation process.

4.3   Enabling the API in the Live Project Database

4.3.1 Following testing and authorisation to release the live database (e.g. ACCORD QA approval for regulated projects or risk-assessed non-regulated projects or similar approval from an external sponsor), assign the **ectu.redcap** username to the live database prior to moving to 'Production'.

4.3.2 Follow the steps described in 4.2.3 above to generate the API token for the live database.

4.3.3 The project's assigned senior software developer must be provided access to the new API token and the live database PID. The senior software developer does not require data entry access to the live database. The field labels and codes for the project's API trigger do not change in the live database.

4.3.4 Enable the data entry trigger by navigating to 'Additional Customizations' on the Project Setup page. Tick the 'Data Entry Trigger' checkbox. The senior software developer will provide the URL of the website to be entered in the 'URL of website' field.

4.3.5 Move the project to production following the SOP for REDCap development and release.

5.0   RELEVANT DOCUMENTS AND REFERENCES

REDCap Specification

Validation Documentation

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