Data Resolution Workflow
The Data Resolution Workflow allows users to open a workflow for documenting the process of resolving issues with data in the project (i.e. opening, responding to, and closing data queries). This data resolution workflow, often called 'data queries' in clinical trials and studies, can be utilized either on a data entry form (clicking the balloon icon next to the field) or on the Data Quality page when finding data discrepancies. The Data Quality module will then display a new 'Resolve Issues' tab, which will allow users to view all resolved and unresolved data queries and thus resolve any queries that are still open. Different user privileges may be given to users that control whether or not users can view, open/close, or respond to data queries.

For a brief overview, view the Data Resolution Workflow video:

[VIDEO: Data Resolution Workflow]
On the Project Setup tab, click on Additional customizations:

Enable optional modules and customizations

- Enable Auto-numbering for records
- Disable Scheduling module (longitudinal only)
- Enable Randomization module
- Enable Designate an email field to use for invitations to survey participants

Then check off the Enable Data Resolution Workflow feature:

Enable the Field Comment Log or Data Resolution Workflow (Data Queries)?

For this project, you may enable either the Field Comment Log or Data Resolution Workflow (also known as the Data Queries module). The Field Comment Log (enabled by default) allows users to leave comments for any given field on a data entry form by clicking the balloon icon next to the field. All comments can also be viewed, searched, and downloaded on the Field Comment Log page. Alternatively, if the Data Resolution Workflow is enabled, users will be allowed to open a workflow for documenting the process of resolving issues with data in the project (i.e. opening, responding to, and closing data queries).

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Enable: Data Resolution Workflow
Before the users in your project can begin utilizing the Data Resolution Workflow, they must first be given user privileges to do so. These user privileges dictate the things which they are allowed to do within the Data Resolution Workflow. Navigate to the User Rights page where you will see a new section of privileges specifically for the Data Resolution Workflow. You may give any user one of the following privileges: no access, view only, respond only, and open/close/respond to queries. All users will initially have 'no access' privileges.
An open data query implies that there is an issue with a data value that needs to be resolved. Opening the query initiates the process of investigating the issue and resolving it (i.e. closing the query). The most typical place to open a data query is for a field on a data entry form. On the form, click the gray balloon next to the field, which will open up the Data Resolution Workflow pop-up. This will allow you to open a new query if you have appropriate user privileges to do so in which you can leave a descriptive comment along with the ability to assign that particular data query to another user (optional).
Data queries may also be opened on the Data Quality page when viewing the results of an executed Data Quality rule in which a button to open the Data Resolution Workflow will appear next to each result in the pop-up. If a data query's status is either 'Closed' or 'Data Verified', it will not be initially displayed as visible in Data Quality discrepancy results anymore but will be considered as excluded (since it is considered resolved). Any excluded results can always be made visible by clicking the 'view' link in the Data Quality results pop-up.
Any user with 'respond' privileges will be able to respond to an open query (even if it is assigned to a specific user). The responder may select a response type (e.g. typographical error) and provide a descriptive comment with the ability to also attach a file (optional). Once a query has been responded to, a user with 'close' privileges may close the query, after which it will be considered resolved.
While data queries will be opened either on a data entry form or via the results of a Data Quality rule, users will most likely respond to and close queries on the 'Resolve Issues' page (seen on left-hand menu). This page will serve as a dashboard that will neatly organize all queries (both open and closed) so that they may be reviewed and so that any open queries may be easily responded to and closed. That page can serve as a nice to-do list for addressing all open queries.
It can sometimes be useful to view metrics with regard to your data queries, such as a count of how many queries are open or closed, the average time that users respond to an open query, or the average time to query resolution. The 'Resolution Metrics' page will provide some useful statistics and some helpful bar charts for viewing progress and activity. If your project utilizes Data Access Groups, it provides even more useful charts to compare the progress of the different groups and to stratify their activity.
FOR FURTHER HELP

- website: https://cri.uchicago.edu/redcap
- email: redcap@rt.cri.chicago.edu