

### Version 12.0.7 (released on 2021-12-28)

#### CHANGES IN THIS VERSION:

- **Change:** The dialog that is displayed when editing a field's branching logic in the Online Designer, in which one or more fields have the exact same branching logic as the current field, contains different text to better explain what clicking "Yes" will do.

### Version 12.0.5 (released on 2021-12-17)

#### CHANGES IN THIS VERSION:

- **New feature:** New design for the "Help & FAQ" page.
- **New Smart Variable: [event-number]** - The current event's ordinal number as listed on the Define My Events page that denotes the order of the event within a given arm. (Ticket #70973)
- **Improvement/change:** The Define My Events page now displays a new column to display each event's Event ID number. Also, the Smart Variable corresponding to each column in the table on the Define My Events page (e.g., [event-number], [event-label]) are displayed in small gray text below the header text in the table to help users more easily learn where the values of those Smart Variables originate. (Ticket #115791)

### Version 12.0.3 (released on 2021-12-03)

#### CHANGES IN THIS VERSION:

- **Improvement/change:** When using Multi-Language Management on a survey, the current language name is now displayed next to the globe icon at the top right of the survey page so that participants more intuitively understand what the current language is and to click it to change the language.
- **Improvement/change:** The Online Designer now denotes whether a field on the instrument contains embedded fields inside its label, choices, notes, etc. by displaying a blue box saying "Contains embedded fields", similar to the green "Field is embedded elsewhere on page" boxes for embedded fields themselves. This will provide users with visual cues to know when and where field embedding is occurring.
- **Improvement:** The Design Checker feature for Clinical Data Mart now has improved descriptions of changes that will be made, including the severity of the design issue.
- **Change:** In the "Add Field"/"Edit Field" dialog in the Online Designer, it is no longer possible to tab into the Action Tags text box. This was changed because users found it a bit jarring for the Logic Editor dialog to automatically display as they are tabbing through the fields inside the "Add Field"/"Edit Field" dialog.
- **Change:** Light gray square brackets are now displayed around the variable name for each field on the Data Dictionary Codebook to aid users when searching for a specific field on the page (because it may sometimes be hard to find a field on the page if it is used in lots of branching logic or calculations).

### Version 12.0.0 (released on 2021-11-22)

#### CHANGES IN THIS VERSION:

- **New feature: Multi-Language Management**
  - **Summary:** Users can create and configure multiple display languages for their projects for surveys, data entry forms, alerts, survey invitations, etc. Users can design data collection instruments and have them be displayed in any language that they have defined and translated so that their survey participants or data entry persons can view the text in their preferred language. This eliminates the need to create multiple instruments or projects to handle multiple languages. NOTE: The MLM feature will not auto-translate text, but provides tools so that users may easily translate them themselves.
  - **Usage:** When entering data on a data entry form or survey, users and participants will be able to choose their language from a drop-down list or buttons on the page to easily switch to their preferred language for the text displayed on the page. This feature allows users to translate all text related to the data entry process, both for surveys and for data entry forms. Even various survey settings and email text can be translated. For users on data entry forms, if a language is selected, that selection is stored in the user's user account settings internally (in the REDCap backend database), whereas a survey

participant's selected language will be stored in a cookie in their web browser as a way to remember their language preference if they return in the future (and also to maintain their selected language from page to page). The language can be pre-selected for a participant, if desired, using the "Language preference field" setting on the MLM page in the project or via the @LANGUAGE-FORCE action tags (seen below).

- User Rights: Users must have Project Design/Setup privileges in a project in order to see the link to the Multi-Language Management page on the left-hand menu.
- System-level Configuration: The MLM feature can be completely disabled at the system level, if desired, via the MLM page in the Control Center (on the Settings tab). On this page in the Control Center, admins can optionally seed any User Interface (i.e., stock language) translations for the entire REDCap installation, in which users could import any activated User Interface translations into their project. This will only import the User Interface elements (since those are universal to each project), but it can be a big time saver to prevent the user from having to translate those common elements in their project. These can be imported via the Create New Language process in a project (or via the Edit Language setting also).
- Note: The MLM feature works seamlessly with SMS messages sent via Twilio. Additionally, the MLM feature works with the e-Consent Framework, in which the archived PDF of the participant's consent form will be stored in the File Repository in the same language in which the participant took the survey.
- Note: When a project is in production, the MLM page and all translations can only be modified when the project is in Draft Mode. So if the user desires to make edits or additions to their translations, they must first enable Draft Mode via the Online Designer, and then return to the MLM page to make translation changes while in Draft Mode. When the drafted changes are approved, their translation changes made while in Draft Mode will automatically be approved together with them.
- **New Action Tags for Multi-Language Management**
  1. @LANGUAGE-CURRENT-FORM - Allows you to capture the currently used language in projects where multilingual data is enabled on data entry forms. The @LANGUAGE-CURRENT-FORM action tag can be used on fields of type 'Text Box' (no validation), and 'Drop-down List', or 'Radio Buttons' (these need to have choices whose codes correspond to the IDs of the defined languages - e.g., 'en'). This action tag is only active on data entry forms and will always, when possible, set the field's value to the currently active language.
  2. @LANGUAGE-CURRENT-SURVEY - Same as @LANGUAGE-CURRENT-FORM, but works only on survey pages. For multi-page surveys, @LANGUAGE-CURRENT-SURVEY needs to be used on a field of each page where capture of the language is relevant (e.g. for performing branching).
  3. @LANGUAGE-FORCE - When used on a field, the data entry form or survey on which the field is located will be rendered in the specified language (which must have been set up using the Multi-Language Management feature). The format must follow the pattern @LANGUAGE-FORCE="???", in which the ID of the desired language should be inside single or double quotes - e.g., @LANGUAGE-FORCE="de". Piping is supported - e.g., @LANGUAGE-FORCE="[field\_name]". When the language is forced successfully (i.e., it exists and is active), the language selector is hidden. Using this together with @LANGUAGE-CURRENT-FORM/SURVEY on the source field for @LANGUAGE-FORCE may be used to 'lock in' a user to their selected language.
  4. @LANGUAGE-FORCE-FORM - Same as @LANGUAGE-FORCE, but the effect is limited to data entry forms (i.e. this does not affect surveys).
  5. @LANGUAGE-FORCE-SURVEY - Same as @LANGUAGE-FORCE, but the effect is limited to surveys (i.e. this does not affect data entry forms).
  6. @LANGUAGE-SET - When used on a Drop-down or Radio Button field only, this action tag will allow the field's value to control the currently shown language (in the same way as switching the language via the buttons at the top of the page).  
Tip: When used in a survey, this field could be prepopulated (and thus auto-

selected) by embedding a participant's language ID in the survey URL itself (for details, see the FAQ's "How to pre-fill survey questions" section).

- Thanks to Günther Rezniczek for all his work to help us build the new Multi-Language Management feature.
- **New feature: Form Display Logic**
  - Form Display Logic is an advanced feature that provides a way to use conditional logic to disable specific data entry forms that are displayed on the Record Status Dashboard, Record Home Page, or the form list on the left-hand menu. You might think of it as 'form-level branching logic'. Form Display Logic can be very useful if you wish to prevent users from entering data on a specific form or event until certain conditions have been met. The forms will still be displayed on the page, but they will be disabled in order to prevent users from accessing them. Below you may define as many conditions as you want. A form may be selected in multiple conditions, but if so, please note that the form will be enabled if at least one of the conditions is met. The Form Display Logic does not impact data imports but only operates in the data entry user interface to enable/disable forms. Additionally, Form Display Logic is not utilized by the Survey Queue at all but can affect the behavior of the Survey Auto-Continue feature if the checkbox for it is enabled in the setup dialog. The Form Display Logic setup can be found by clicking the "Form Display Logic" button at the top of the instrument list in the Online Designer.
  - This feature serves as the official integration of the Form Render Skip Logic external module created by Philip Chase and his team. Thanks to them for their work on this module. Note: When upgrading REDCap to v12.0.0 or higher, if the Form Render Skip Logic is installed and is being used by any projects, all the configuration settings for the module will automatically be translated into the new Form Display Logic settings format, after which the external module will be disabled for each project and also for the entire system (since it will no longer be needed). This all happens automatically during the upgrade.
- **Improvement:** Errors displayed in the Survey Invitation Log when sending SMS or Voice Calls via Twilio will now display the full error message returned by Twilio's API to provide the user with more information regarding why the SMS/Voice Call failed to send successfully.
- **Change:** When drafted changes are auto-approved in a production project, the "Changes Were Made Automatically" dialog now provides extra text reminding the user that if any new instruments were just added, by default no users in the project have access to any newly created instruments. Thus they might need to grant users access to the new instruments.

#### **Version 11.4.4 (released on 2021-11-12)**

##### **CHANGES IN THIS VERSION:**

- **Improvement:** New parameter "repeat\_instance" was added to the API method "Export PDF file of Data Collection Instruments" to allow users to export a PDF of an instrument for a specific repeating instance of a repeating instrument/event. (Ticket #117182)
- **Change/improvement:** When a survey participant partially completes a survey that has the Save & Return Later feature enabled, and an email is then sent to the participant to remind them to finish their survey later, instead of sending that email from the system-level "Email Address of REDCap Administrator" (as in previous versions), the "From" email address of the "Survey partially completed" email will be set to the sender's address from the most recent survey invitation received by the participant. This will create more consistency and will reduce confusion for participants when attempting to reply back to the email, as has been a problem in the past.

#### **Version 11.4.3 (released on 2021-11-05)**

##### **CHANGES IN THIS VERSION:**

- **Change/improvement:** A button to open the Codebook page as a floating popup window was added inside the Logic Editor popup to allow users to easily find and reference fields they want to use in their logic while in the editor.

#### Version 11.4.2 (released on 2021-10-29)

##### CHANGES IN THIS VERSION:

- Change: The email that users receive from an administrator that has just approved their production changes now reminds them that the default Data Viewing Rights for any newly added instruments will be 'No Access (Hidden)'.

#### Version 11.4.1 (released on 2021-10-22)

##### CHANGES IN THIS VERSION:

- **Improvement:** New option for Protected Email Mode - Users may now upload a custom logo that they wish to be displayed on the webpage and in emails utilizing the Protected Email Mode. This feature is supplementary to the existing custom text option for Protected Email Mode. This option is located in the Protected Email Mode section of the Additional Customizations popup on the Project Setup page.

#### Version 11.4.0 (released on 2021-10-11)

##### CHANGES IN THIS VERSION:

- **New action tag: @IF** - Allows various action tags to be set based on conditional logic provided inside an @IF() function - e.g., @IF(CONDITION, ACTION TAGS if condition is TRUE, ACTION TAGS if condition is FALSE). Simply provide a condition using normal logic syntax (similar to branching logic), and it will implement one set of action tags or another based on whether that condition is true or false. For example, you can have @IF([yes\_no] = '1', @HIDDEN, @HIDE-CHOICE='3' @READ-ONLY), in which it will implement @HIDDEN if the 'yes\_no' field's value is '1', otherwise, it will implement the two action tags @HIDE-CHOICE='3' and @READ-ONLY. If you wish not to output any action tags for a certain condition, set it with a pair of apostrophes/quotes as a placeholder - e.g., @IF([my\_radio]='1', @READONLY, ""). You may have multiple instances of @IF for a single field. You may also have multiple nested instances of @IF() inside each other. Both field variables and Smart Variables may be used inside the @IF condition. The @IF action tag is also evaluated for a given field when downloading the PDF of an instrument/survey, in case there are any PDF-specific action tags used inside of @IF(). Note: The conditional logic will be evaluated only when the survey page or data entry form initially loads; thus the action tag conditions will not be evaluated in real time as data is entered on the page.
- **New feature: Protected Email Mode**
  - Users can enable the Protected Email Mode on any project on the Project Setup via the Additional Customization dialog. 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 someone is accessing an email in the Protected Email Mode for the first time (or for the first time in the past 30 days), 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. The Protected Email Mode is similar to Microsoft Outlook's "sensitivity label" feature.
  - When enabled in a project, user's may specify custom text/HTML to display at top of the sent email and web page where the original email is viewed. This will allow users to also display logos/images pertaining to their project or institution.
  - This feature can be disabled in all projects via a global setting on the Modules/Services Configuration page in the Control Center.
- **New feature: Email Logging page**
  - This is a new project page that contains a search interface to allow users with User Rights privileges to search and view ALL outgoing emails for that project (also includes searching and viewing of SMS messages if using Twilio services).
  - This feature can be disabled in all projects via a global setting on the Modules/Services Configuration page in the Control Center.
  - "Re-send email" feature - When viewing an individual email after performing a search on the page, a "Re-send email" button will be displayed in the dialog to allow users to re-

send the email. Note: If the original email contained email attachments, the attachments will not be included in the email that is re-sent.

- Only users with User Rights privileges in the project may access the page, and additionally they must opt-in and agree to a disclaimer before being able to view the page. The following text will be presented to the user before accessing the page: “Before viewing and accessing this page, you must first agree that you understand the following important information and conditions. This page is only accessible by users having User Rights privileges in this project. The Email Logging feature allows users to search and view \*all\* outgoing emails related to this project, and this includes being able to view all aspects of any given email (i.e., the recipient(s), sender, subject, message body, attachment names). If you are using anonymous surveys in this project, keep in mind that viewing this page and the emails displayed therein might inadvertently cause anonymous survey responses to be identifiable/de-anonymized. Additionally, if the project is using Data Access Groups, you will be able to view the emails related to all DAGs in this project (and thus possibly any data piped into the body of those emails). If you understand and agree to these conditions, click the button below. Please note the act agreeing to this disclaimer will be documented on the project Logging page.”
- **Improvement:** When using the "Reason for Change" feature in a project, a new button is displayed underneath each "reason for change" textbox on the Data Import Tool summary page. Users can simply click the button to copy the text to all other "reason for change" textboxes on the page, thus saving lots of time of having to add text to each individually. This feature is the integration of Luke Steven's "Copy Change Reason" external module, which will be automatically disabled at the system-level when upgrading to (or past) REDCap 11.4.0 to prevent any conflicts.
- **Improve: New data export option - Export blank values for gray instrument status**
  - All instrument complete status fields having a gray icon can be exported either as a blank value or as "0"/"Incomplete". In previous versions, they could only be exported as "0". By default, they are now exported with a value of "0", but this option can be changed via a drop-down option in the "Advanced data formatting options" section of the data export dialog.
  - When exporting the Project XML file with both metadata & data, the option to export gray instrument status as a blank value will be preselected by default, whereas in other data export contexts (e.g. My Reports & Exports page), the option to export them as "0" will be preselected by default.
  - The API method "Export Records" has a new optional parameter "exportBlankForGrayFormStatus" that can accept a boolean (true/false) with default value = false, and it functions the same as its equivalent data export option in the user interface.
  - Note: Exporting gray instrument statuses as blank values is recommended if the data will be re-imported into REDCap. For example, when users export a Project XML file for a project and then create a new project with it, all the gray instrument status icons will be preserved in the new project, whereas in previous versions they were all converted into red status icons.
- **Improvement:** New option "Allow normal users to edit their primary email address on their Profile page" on the User Settings page in the Control Center. This setting will be enabled by default, but an admin can disable it if they wish to prevent any users from modifying their primary email address for their user account.
- **Improvement:** The developer methods REDCap::getSurveyLink() and REDCap::getSurveyQueueLink() now have an optional parameter "project\_id" that (when provided) allows one to call the method outside of that target project's context. If project\_id is not explicitly provided, then the methods must still be called within their target project's context.

#### Version 11.3.4 (released on 2021-09-23)

##### CHANGES IN THIS VERSION:

- **Improvement:** When executing many data quality rules at once, the total time to finish all the rules occurs 3X faster. Instead of running only one rule at a time in a serial fashion, REDCap now executes three rules simultaneously when clicking the "All", "All except A&B", and "All custom" buttons at the top of the Data Quality page.

- Change: When viewing a report while using a mobile device, it will no longer enable the floating table headers or floating first column automatically for the report table. This was changed because the floating headers/column made it difficult to view parts of a report while on a mobile device with a small screen.

### Version 11.3.3 (released on 2021-09-17)

#### CHANGES IN THIS VERSION:

- **New API method “Rename record” and new developer method REDCap::renameRecord()** allows users/developers to rename a record in a project. For multi-arm longitudinal projects where a record might exist on multiple arms, the \$arm number can be specified to rename the record only on the specified arm, otherwise by default it will rename the record in all arms in which it exists.
- Change: Renamed the "My Profile" page to "Profile".

### Version 11.3.2 (released on 2021-09-10)

#### CHANGES IN THIS VERSION:

- **Improvement:** The Project Revision History page now displays icons next to each production revision and snapshots, and after being clicked, will display options to compare that revision/snapshot with any other revision/snapshot in the project. (This feature represents the integration of the "Data Dictionary Revisions" external module created by Ashley Lee at BC Children's Hospital Research Institute).
- **Improvement:** When using the eConsent Framework in a project, the "PDF Survey Archive" tab on the File Repository page now displays a "Download all" button that will download all PDF files displayed on the page in a single zip file. Additionally, there is a record filter drop-down list and a "file type" drop-down list, which distinguishes between general "PDF Auto-Archiver" PDFs and "eConsent Framework" PDFs. Note: If a user is in a Data Access Group, they will only be able to download and filter on records in their DAG.

### Version 11.3.1 (released on 2021-09-03)

#### CHANGES IN THIS VERSION:

- **New feature:** “DAG Switcher” API method - When using the DAG Switcher functionality in a project, this method allows users to move themselves in and out of a Data Access Group at will using the API just as they would do the same thing in the user interface (assuming they have been assigned to multiple DAGs on the DAG Switcher page).
- Change: Any multi-select drop-downs that are enhanced using the Select2 JavaScript library (e.g., the "Email To" field when creating/editing an alert) now display a down arrow on their right edge to better indicate that they are a clickable drop-down list.
- Bug fix: When navigating in a project on a mobile device, in which the user has been assigned to multiple Data Access Groups via the DAG Switcher, the blue toolbar at the top of the page for switching DAGs would mistakenly not be visible. (Ticket #113459)
- Bug fix: In a longitudinal project, Data Quality rules A and B might mistakenly not return a discrepancy when a field is missing a value in which the field's branching logic contains a Smart Variable and also does not have a unique event name or X-event-name prepended to all the field variables used in the rule logic. (Ticket #111474)

### Version 11.3.0 (released on 2021-08-27)

#### CHANGES IN THIS VERSION:

- **New action tag: @RICHTEXT** - Adds the rich text editor toolbar to a Notes field to allow users/participants to control the appearance (via styling and formatting) of the text they are entering into the field.
- **New API methods**
  - Delete User - Remove a specified user from a project.
  - Export User Roles - Returns a list of user roles, including their role name, unique role name, and privileges, from a project.
  - Import User Roles - Allows one to create new roles (specifying their role name and privileges) or edit the role name and privileges of existing roles.
  - Delete User Role - Deletes a specified user role from a project.
  - Export User-Role Assignment - Returns a list of project users and what user role to which they are assigned.

- Import User-Role Assignment - Allows one to assign, reassign, or unassign one or more users to/from a user role in a project.
- **New features:** New drop-down options on the User Rights page to allow users to perform the tasks listed below using a CSV file in the user interface.
  - Upload users and their privileges
  - Download users and their privileges
  - Upload user roles and their privileges
  - Download user roles and their privileges
  - Upload user role assignments
  - Download user role assignments
- **New developer method: REDCap::deleteRecord()** - Plugin/hook/module developers may utilize this new method to delete entire records from a project or to delete the data from a specified instrument, event, or repeating instrument/event for specific records.
- **Improvement:** More options/parameters for the API Delete Record method - Users can now specify instrument, event, and/or repeat\_instance to delete the data from a specified instrument, event, or repeating instrument/event for the records specified in the API request. In previous versions, the only option was to delete the entire record.
- **Change/improvement:** When an administrator is reviewing a user's submitted production changes for Draft Mode on the "Project Modification Module" page and then clicks the "Compose confirmation email" button in the blue "Administrator Actions" box, the email template displayed in the dialog now contains clearer wording to help users better understand how to respond. This helps make the production change process faster and more efficient.
- **Change:** If new instruments are created in a project while in production status, all users and user roles will no longer automatically get full "View & Edit" rights to that instrument for their Data Viewing Rights but instead will receive "No Access (Hidden)" rights by default for new instruments. When in development status, the instrument-level rights still defaults to "View & Edit" for new instruments. This change helps improve security when a project is in production to ensure that users do not accidentally gain access to data that they should not see if new instruments are still being added to the project. (Ticket #54096)
- **Change/improvement:** When viewing the Record Status Dashboard in which one or more repeating instrument tables are displayed at the bottom of the page, if any of the tables were collapsed on a previous visit of the page, the page will load much faster, especially for records containing hundreds or more repeating instances.

#### Version 11.2.6 (released on 2021-08-20)

##### CHANGES IN THIS VERSION:

- **Improvement:** On the External Modules page in a project, users with appropriate privileges may now import and export the configuration settings for any module that is enabled in the project. This feature functions as a convenience by allowing users to easily migrate the configuration settings of one or more modules to another project that has the same module(s) enabled.
- **Improvement:** If a user is not assigned to a Data Access Group in a project, the user will now see a new "[No assignment]" option in the "Displaying Data Access Group" drop-down list on the Record Status Dashboard, in which selecting that option will display only records that have not been assigned to any DAG.
- **Change/improvement:** "Previous instrument" and "Next instrument" buttons were added at the top right of the Online Designer field-view page to allow easier navigation between instruments. (Ticket #101057)
- **Bug fix:** When viewing the data entry form for a survey-enabled instrument, if the Compose Survey Invitation dialog is opened on the page, then closed, and then opened again without refreshing the page, the rich text editor in the dialog would mistakenly not be initiated anymore. (Ticket #96574)
- **Bug fix:** Custom Application Links (which are to be displayed on the left-hand project menu) were mistakenly only visible to users with User Rights privileges in the project. (Bug #112651)

### Version 11.2.5 (released on 2021-08-13)

#### CHANGES IN THIS VERSION:

- **Improvement/change:** Any HTML used in the value of a Text field or Notes field will no longer be escaped on a report (i.e., displayed as-is) but instead the HTML will be interpreted on the report to allow for the styling of text on the page. This means that while previous versions would have displayed the text value "<b>Word</b>" literally as "<b>Word</b>" (without quotes) on a report, it now instead displays "Word" as bolded text on a report. Note: This does not affect data exports or any pages other than reports.

### Version 11.2.4 (released on 2021-08-06)

#### CHANGES IN THIS VERSION:

- Bug fix: When downloading a Descriptive field attachment while on a survey page, it might mistakenly return an error message and prevent the participant from downloading the file.
- Bug fix: When downloading a file for a File Upload field or an attachment for a Descriptive field, in which that file is being counted via the @DOWNLOAD-COUNT action tag on another field, the download count would not get successfully incremented for the @DOWNLOAD-COUNT field when the file is downloaded on a survey page (as opposed to on a report or data entry form).
- Bug fix: When downloading a file for a File Upload field or an attachment for a Descriptive field, in which that file is being counted via the @DOWNLOAD-COUNT action tag on another field, it might mistakenly attempt to save the incremented value to a non-existent record (as seen in the logging) when the file is downloaded on a public survey that has not been saved yet (i.e., the record does not yet exist).

### Version 11.2.3 (released on 2021-08-06)

#### CHANGES IN THIS VERSION:

- **New action tag: @DOWNLOAD-COUNT** - The @DOWNLOAD-COUNT action tag provides a way to automatically count the number of downloads for a File Upload field or a Descriptive field attachment. It can be used on a Text field or Notes field so that its value will be incremented by '1' whenever someone downloads the file for either a File Upload field or a Descriptive field attachment. The variable name of the File Upload field or Descriptive field whose downloads are to be counted should be provided inside the @DOWNLOAD-COUNT() function. For example, the Text field 'my\_download\_count' might have its action tag defined as @DOWNLOAD-COUNT(my\_upload\_field), in which 'my\_upload\_field' is the variable of a File Upload field. Whenever the file is downloaded on a data entry form, survey page, or report, the value of the field with this action tag will be incremented by '1'. If that field has no value or has a non-integer value, its value will be set to '1'. NOTE: The download count field must be in the same context as the File Upload field or a Descriptive field. This means that in a longitudinal project the two fields must be on the same event, and in a repeating instrument context, they must be on the same repeating instrument.
- Change: Added clarifying text regarding the behavior of a non-active Automated Survey Invitations in the ASI dialog in the Online Designer. (Ticket #111182)

### Version 11.2.2 (released on 2021-07-16)

#### CHANGES IN THIS VERSION:

- **Improvement:** New piping parameter ":ampm" - When piping a time, datetime, or datetimes w/ seconds Text field, appending ":ampm" to the variable name (e.g., [visit\_time:ampm]) will display the time in am/pm format (e.g., 4:45pm, 10:35am) instead of military time.

### Version 11.2.1 (released on 2021-07-09)

#### CHANGES IN THIS VERSION:

- Major bug fix: If using the AWS S3 file storage option, a fatal PHP error would occur when uploading or downloading documents, including on the Configuration Check page. (Ticket #110210)

## Version 11.2.0 (released on 2021-07-09)

### CHANGES IN THIS VERSION:

- **New feature: Ability to make reports accessible at a public link**
  - Summary: When editing a report, users can now set a report as “public” and can obtain a public link to the report if they have User Rights privileges in the project. When a report is public, this means that all data in the report will be fully accessible (with no authentication required) to anyone with the public link to the report.
  - In order to make a report public, all the following must be true:
    - The user must have User Rights privileges in the project or be a REDCap administrator.
    - The report cannot have any Identifier fields in it.
    - The user is required to view the report during their current REDCap session.
    - The user must agree to and check off the following statements: 1) I understand that making this report “public” means that all data in the report will be fully accessible to anyone with the public link to the report, and 2) I understand that I am responsible if any private, sensitive, or identifying data in the report is exposed to persons who should not have access to such data.
  - The behavior of how reports are made public can be controlled at the system level near the bottom of the User Settings page in the Control Center using the setting “Allow reports to be made ‘public?’”. Admins may completely disallow reports to be made public (although admins will still have this ability to do so). But if enabled, they may choose to allow users to make reports public on their own or enable the To-Do List approval process by which an admin will need to approve their request to make a given report public (similar to the same system level approval process for Project Dashboards being made public).
  - Once a report has been made public, its configuration cannot be modified while it is public (users cannot add new fields, modify filter logic, etc.). In order to modify a public report, the user will need to make it no longer public, then make their changes, and then make it public again.
- **New Smart Variables**
  - [event-id] - (longitudinal only) The event id number of the current event.
  - [survey-access-code:instrument] - The Survey Access Code of the specified survey for a given record/event/instance. The format must be [survey-access-code] or [survey-access-code:instrument], in which 'instrument' is the unique form name of the desired instrument. This can be used simply as [survey-access-code] inside the content of a survey invitation, in which 'instrument' is assumed to be the current survey instrument.
  - [survey-return-code:instrument] - The Survey Return Code of the specified survey for a given record/event/instance in order to allow a participant to return to a completed or partially completed survey response when using the 'Save & Return Later' survey feature. The format must be [survey-return-code] or [survey-return-code:instrument], in which 'instrument' is the unique form name of the desired instrument. This can be used simply as [survey-return-code] inside the content of a survey invitation, in which 'instrument' is assumed to be the current survey instrument.
  - [user-role-id] - The Role ID of the user role to which the current user is assigned (blank if not assigned to any user role). This value is auto-generated for each user role. NOTE: This value is not just unique for all roles within the project but is also unique across all REDCap projects. Thus, if the project and its user roles are copied, the Role IDs of the user roles in the resulting copy will be different from the ones in the original project.
  - [user-role-name] - The unique role name of the user role to which the current user is assigned (blank if not assigned to any user role). This value is auto-generated for each user role. NOTE: This value is only unique for roles within the project. Thus, if the project and its roles are copied, the new project will retain the same unique role names, which allows you to utilize the unique role names in conditional logic, calculations, branching logic, etc. that will not break when the project is copied.
  - [user-role-label] - The name/label of the user role to which the current user is assigned (blank if not assigned to any user role). This value is defined by the user that creates the user role.
- **New Action Tag: @MAXCHOICE-SURVEY-COMPLETE** - Similar to @MAXCHOICE but only counts choices on completed survey responses (does not count data entered as data entry only or on partial responses). Causes one or more specified choices to be disabled (i.e., displayed but not usable) for a checkbox, radio button, or drop-down field after a specified amount of records have been saved with that choice for completed survey responses only.
- **New feature: Tableau Data Export**- Extract all records into Tableau via the REDCap API.
  - This feature enables Tableau (v10.0+) users to connect Tableau to a REDCap project using an API token. Project data can be exported on demand and be available for use within Tableau to produce summaries and visualizations. The Other Export Option page in any given project has instructions to export project data into Tableau.

- NOTICE: It is required for a user to have an API token generated for the project in order to use this feature.
- **New feature: Project-level setting “Prevent branching logic from hiding fields that have values”**
  - This setting can be enabled by any project user with Project Setup/Design privileges in the Additional Customizations popup on the Project Setup page.
  - This setting affects both data entry forms and surveys. If it is not enabled (default), then whenever a field is to be hidden by branching logic on a data entry form, it will always ask the user if they wish to hide the field and erase its value, whereas on survey pages it will automatically erase the value of the field being hidden without displaying the confirmation prompt, which has always been the default behavior for surveys. If this setting is enabled, the branching logic behavior will change so that fields with values will not cause the 'Erase the Value of the Field?' confirmation prompt to ask the user if they wish to keep the value or hide the field, and instead fields with values will not be hidden by branching logic and will stay visible. Thus they will be exempt from branching logic. This will prevent data from being erased as it normally does if fields are hidden by branching logic.
  - When a field should be hidden by branching logic but is not hidden because it has a value, an icon will be displayed on the field to indicate this to the user.
  - This project-level setting is included in the API Export Project Info method as “bypass\_branching\_erase\_field\_prompt”. The REDCap Mobile App will soon have this same functionality, but it will only work if the REDCap server is on REDCap 11.2.0 or higher.
  - The name of Data Quality rule F has been slightly changed when this setting is enabled from “Hidden fields that contain values” to “Fields that contain values that should be hidden”.
- **Improvements for report display and/or data exports-** When creating/editing a report, the “Additional report options” section in Step 2 now contains the new options below:
  - For projects that have repeating instruments and/or repeating events, the repeating fields that are automatically added (e.g., redcap\_repeat\_instrument and redcap\_repeat\_instance) can now be excluded from the report and data export. These fields are displayed by default in reports/exports.
  - Users may choose to display the field label, variable name, or both (default) in the header of a report. Note: This is only used when viewing reports and thus is not applicable for exports since there already exist options for choosing raw vs label format in data exports.
  - Users may choose to display the field label, raw data value, or both (default) for multiple choice fields in the data displayed in a report. Note: This is only used when viewing reports and thus is not applicable for exports since there already exist options for choosing raw vs label format in data exports.
- **Improvement:** If the value of a Text field or Notes field contains a URL or email address, the URL or email address will be converted into clickable link and mailto link, respectively, when viewing the data in a report.
- **Improvement:** More detailed logging descriptions on the Logging page for report-related logged events, such as mentioning the report name and report ID.
- **Improvement:** When users download an Instrument ZIP file for a given instrument in the Online Designer, the zip file now includes all survey settings for the instrument if the instrument has been enabled as a survey, including various files (e.g., survey logo, confirmation email attachment). The downloaded Instrument ZIP can then be uploaded into any project to transfer both the fields and all the survey settings.
- **Improvement:** In the Online Designer, the "Custom text to display at top of survey queue" now utilizes the rich text editor to make it easier to style the custom text.