Testing Project Setup

Disclaimer: Due to limitations of REDCap Export, not all settings can be automatically imported. Therefore, some manual steps are necessary to reproduce the exact testing setup that is used by the redcap-testing-spec.

Import Testing projects

The testing projects are located in `/redcap` and can be imported using the REDCap Project import feature while creating a new project.

Note: You must adjust settings in `/data/<env>/external_modules.json` accordingly:

```
{
    "em_test_pid": 18,
    "cross_test_pid": 19,
    "custom_survey_landing_survey_id": 13
}
```

Import External Module Settings

External Modules Settings can be imported through Control Center > External Modules > Import Module Settings. Not all settings will be setup automatically.

Please adjust settings that are environment specific, such as project_id that map cross_test_pid with em_test_pid.
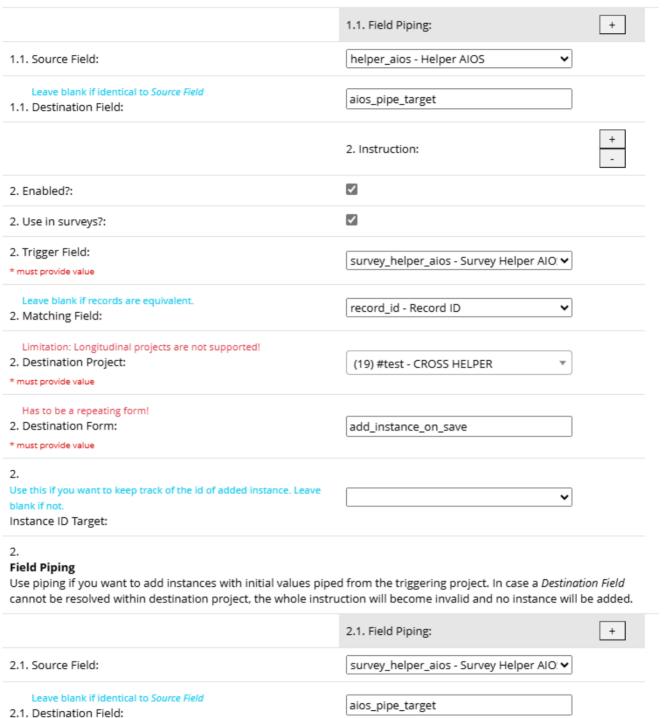
Add Instance on Save

Configure Module: Add Instance on Save   ✕

Project: #test - EXTERNAL MODULES

Settings	Values
Hide this module from non-admins in the list of enabled modules on this project:	☐
Enable Javascript Debug:	☑
	1. Instruction: [+] [-]
1. Enabled?:	☑
1. Use in surveys?:	☐
1. Trigger Field: * must provide value	helper_aios - Helper AIOS ▾
Leave blank if records are equivalent. 1. Matching Field:	record_id - Record ID ▾
Limitation: Longitudinal projects are not supported! 1. Destination Project: * must provide value	(18) #test - EXTERNAL MODULES ▾
Has to be a repeating form! 1. Destination Form: * must provide value	add_instance_on_save
1. Use this if you want to keep track of the id of added instance. Leave blank if not. Instance ID Target:	▾

1.
Field Piping

Use piping if you want to add instances with initial values piped from the triggering project. In case a *Destination Field* cannot be resolved within destination project, the whole instruction will become invalid and no instance will be added.

	1.1. Field Piping:	+

1.1. Source Field:	helper_aios - Helper AIOS ⌄

Leave blank if identical to *Source Field* 1.1. Destination Field:	aios_pipe_target

	2. Instruction:	+ -

2. Enabled?:	☑

2. Use in surveys?:	☑

2. Trigger Field: * must provide value	survey_helper_aios - Survey Helper AIO: ⌄

Leave blank if records are equivalent. 2. Matching Field:	record_id - Record ID ⌄

Limitation: Longitudinal projects are not supported! 2. Destination Project: * must provide value	(19) #test - CROSS HELPER ⌄

Has to be a repeating form! 2. Destination Form: * must provide value	add_instance_on_save

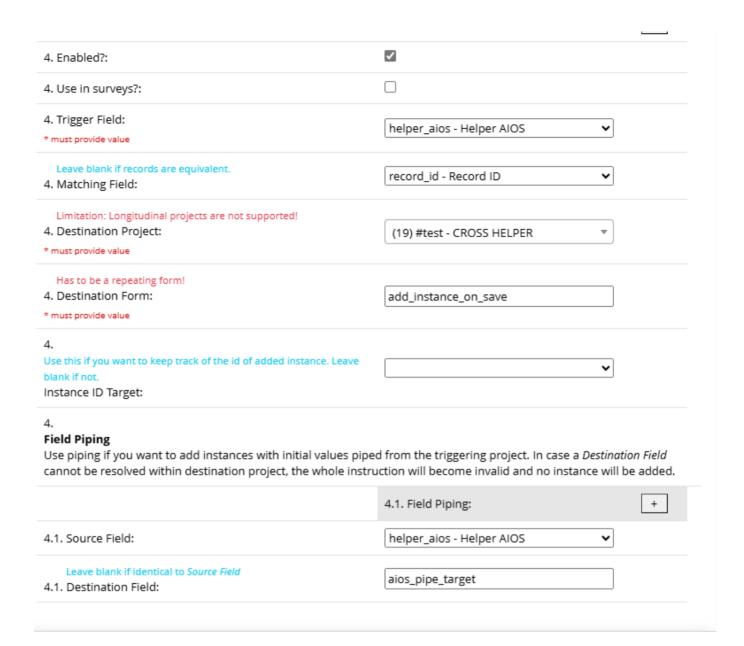| 2. Use this if you want to keep track of the id of added instance. Leave blank if not. Instance ID Target:	⌄

2.
Field Piping

Use piping if you want to add instances with initial values piped from the triggering project. In case a *Destination Field* cannot be resolved within destination project, the whole instruction will become invalid and no instance will be added.

	2.1. Field Piping:	+

2.1. Source Field:	survey_helper_aios - Survey Helper AIO: ⌄

Leave blank if identical to *Source Field* 2.1. Destination Field:	aios_pipe_target

3. Enabled?:	☑
3. Use in surveys?:	☑

3. Trigger Field:
must provide value

survey_helper_aios - Survey Helper AIOS ▼

Leave blank if records are equivalent.
3. Matching Field:

record_id - Record ID ▼

Limitation: Longitudinal projects are not supported!
3. Destination Project:
must provide value

(18) #test - EXTERNAL MODULES ▼

Has to be a repeating form!
3. Destination Form:
must provide value

add_instance_on_save

3.

Use this if you want to keep track of the id of added instance. Leave blank if not.

Instance ID Target:

▼

3.

Field Piping

Use piping if you want to add instances with initial values piped from the triggering project. In case a *Destination Field* cannot be resolved within destination project, the whole instruction will become invalid and no instance will be added.
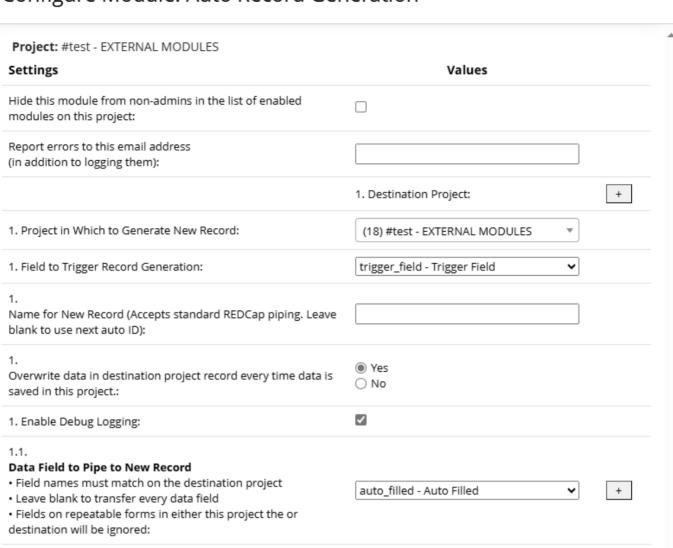
3.1. Field Piping:		+

3.1. Source Field:

survey_helper_aios - Survey Helper AIOS ▼

Leave blank if identical to Source Field
3.1. Destination Field:

aios_pipe_target

4. Enabled?:	☑
4. Use in surveys?:	☐
4. Trigger Field: * must provide value	helper_aios - Helper AIOS ▾
Leave blank if records are equivalent. 4. Matching Field:	record_id - Record ID ▾
Limitation: Longitudinal projects are not supported! 4. Destination Project: * must provide value	(19) #test - CROSS HELPER ▾
Has to be a repeating form! 4. Destination Form: * must provide value	add_instance_on_save
4. Use this if you want to keep track of the id of added instance. Leave blank if not. Instance ID Target:	▾

4.

Field Piping

Use piping if you want to add instances with initial values piped from the triggering project. In case a *Destination Field* cannot be resolved within destination project, the whole instruction will become invalid and no instance will be added.

4.1. Field Piping:	[+]
4.1. Source Field:	helper_aios - Helper AIOS ▾
Leave blank if identical to *Source Field* 4.1. Destination Field:	aios_pipe_target

Auto Record Generation

Configure Module: Auto Record Generation ✕

Project: #test - EXTERNAL MODULES

Settings	Values
Hide this module from non-admins in the list of enabled modules on this project:	☐
Report errors to this email address (in addition to logging them):	[ ]
	1. Destination Project: [+]
1. Project in Which to Generate New Record:	(18) #test - EXTERNAL MODULES ▾
1. Field to Trigger Record Generation:	trigger_field - Trigger Field ▾
1. Name for New Record (Accepts standard REDCap piping. Leave blank to use next auto ID):	[ ]
1. Overwrite data in destination project record every time data is saved in this project.:	◉ Yes ◯ No
1. Enable Debug Logging:	☑
1.1. **Data Field to Pipe to New Record** • Field names must match on the destination project • Leave blank to transfer every data field • Fields on repeatable forms in either this project the or destination will be ignored:	auto_filled - Auto Filled ▾ [+]

Cancel Save

Cross-Project Piping

Configure Module: Cross-Project Piping ✕

Project: #test - EXTERNAL MODULES

Settings	Values
Hide this module from non-admins in the list of enabled modules on this project:	☐

Only users with design rights on all source projects are allowed to configure this module.

	1. Pipe Project:	+
1. Source Project:	(19) #test - CROSS HELPER ▾	
1. Unique Match Field: Unique field used to match records across projects (usually the record_id):	record_id - Record ID ▾	
1. Alternate Source Match Field: This is only used if the Unique Match Field in the destination project has a different variable name from the Unique Match Field in the source project:		

	1.1. Pipe Field:	+
1.1. Destination Field:	cpp_target - CPP Target ▾	
1.1. Source Field: This field is only needed if the Destination Field has a different variable name from the Source Field on the source project:	ccp_source	

1. Active Form(s): Limit piping to only these forms:	▾	+
Piping Mode: * must provide value	Auto pipe on matching Form(s) ▾	
Add a 'Pipe All Records' button to this project's Record Status Dashboard:	☑	
Enable verbose logging for record pipe failures when piping via 'Pipe All' button:	☐	
Allow piping on forms this status or less:	Incomplete ▾	

Cancel   Save