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# Advanced REDCap Form Plugin User Guide

Version 1.0

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# 1 Introduction

Advanced REDCap Form Plugin is a plugin for REDCap that allows users to print the forms they create as pdfs using advanced formatting features.

## 1.1 Features

- All multiple choice questions (checkbox, dropdown, and radio) are rendered in multiple columns if possible. The number and size of columns is determined at runtime based on the longest answer choice.
- Radio and Dropdown elements are rendered with circles for the answer choices. This is to indicate that only one answer should be selected.
- Checkbox elements are rendered with squares for the answer choices. This is to indicate the multiple answers could be selected.
- When a question is broken up onto two different pages, '*(continued on next page.)*' is rendered on the bottom of the first page.
- Date elements are rendered as individual text boxes with a light grey 'M', 'D', or 'Y' in each in order to indicate month, day, or year respectively.
- REDCap allows users to specify branching logic when creating forms or surveys. In order to visually display this branching on the pdf form, the question that has branching logic is indented. Once a question has been indented to the center of the page, further indenting stops in order to preserve the legibility of the document.
- At the top right of every page, the page number is printed along with the total number of pages.
- At the bottom left of every page, the date the form was rendered is printed. This to help ensure that users are not using outdated pdf forms.
- A configuration file can be utilized to create custom forms based on the values provided.

# 2 Installation

## 2.1 Dependencies

**Python** Version 2.7 To install, please see the python site.

**ReportLab** Version 2.5. Once python is installed, you can install ReportLab by typing 'pip install reportlab' into the command prompt or see the ReportLab site for further documentation on the library.

**REDCap** Version 4.9.0 or greater. To install, please see the REDCap site to become a consortium member.

**REDCap Connect** Once REDCap is installed, the Connect file needs to be installed. To install the REDCap Connect file, please see the REDCap wiki plugin page.

## 2.2 Installing the Advanced REDCap Form Plugin

Once all of the dependencies have been installed, place the ‘form’ folder inside the ‘plugins’ folder in the main directory where the ‘database.php’ file is located. If the ‘plugins’ folder does not exist, create the ‘plugins’ folder and place the ‘form’ folder inside it. When you are done, open the ‘form’ folder, locate the ‘config.php’ file, and proceed to follow the instructions below.

Figure 1: Open the ‘config.php’ file with your favorite text editor. You should see two variables, *\$redcap\_connect\_dir* and *\$python\_path*. You will need to change the value of the *\$python\_path* variable to reflect the current python install directory. In most cases, you will not need to change the *\$redcap\_connect\_dir* value. You would only need to change the *\$redcap\_connect\_dir* value if you did not place the ‘redcap\_connect.php’ file in the same directory as your ‘plugins’ folder. Once you are done making changes, save and close the file.

A screenshot of a text editor window titled 'config.php'. The window has a dark background with syntax-highlighted PHP code. The code consists of four lines: line 1 is '<?php', line 2 is '\$redcap\_connect\_dir = dirname(dirname(dirname(\_\_FILE\_\_))) . DIRECTORY\_SEPARATOR;', line 3 is '\$python\_path = '/usr/local/bin/';', and line 4 is '?>'. The window has standard macOS window controls (red, yellow, green buttons) in the top left corner and a blue folder icon in the top right corner.

```
1 <?php
2 $redcap_connect_dir = dirname(dirname(dirname(__FILE__))) . DIRECTORY_SEPARATOR;
3 $python_path = '/usr/local/bin/';
4 ?>
```

The Advanced REDCap Form Plugin is now installed on your server. In order for users to access the plugin, you will need to setup a project bookmark. For instructions on setting up a project bookmark to access the plugin, please see ‘Configuring a Project Bookmark for the Plugin’.

## 2.3 Configuring a Project Bookmark for the Plugin

Once the plugin has been installed on your REDCap server, you can setup bookmarks for users to access the plugin. Follow the instructions below in order to configure a bookmark for the plugin.

Figure 2: Go to your REDCap 'Project Setup' page and select the 'Add or Edit Bookmarks' button.

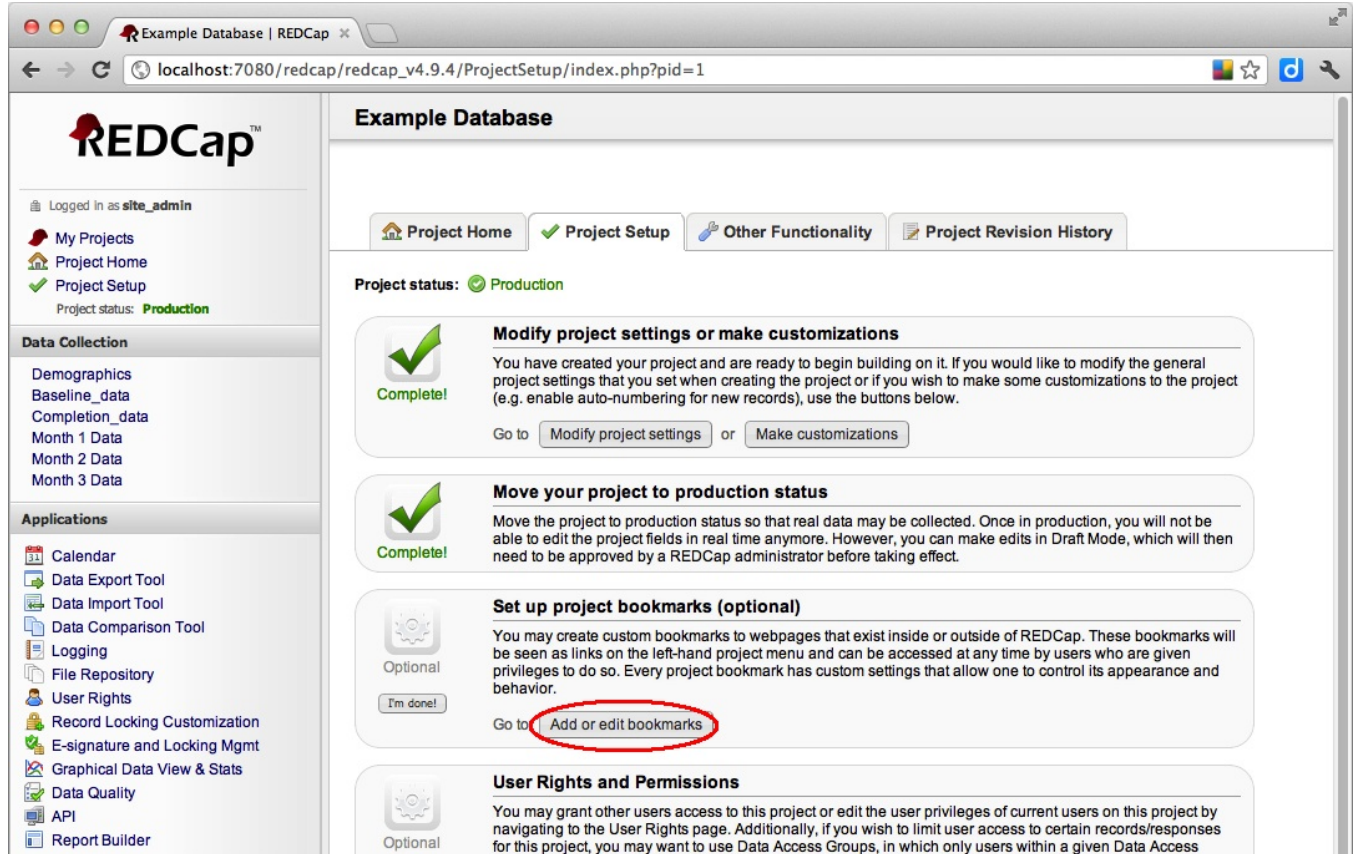


Figure 3: On the Bookmarks page, enter a 'Link Label', which will be displayed on the left sidebar under 'Project Bookmarks'. Then in the 'Link URL/Destination' box, enter your REDCap base URL(circled in red below) followed by '/plugins/index.php'. So in our example, we would be entering 'http://localhost:7080/redcap/plugins/index.php' in the 'Link URL/Destination' box.

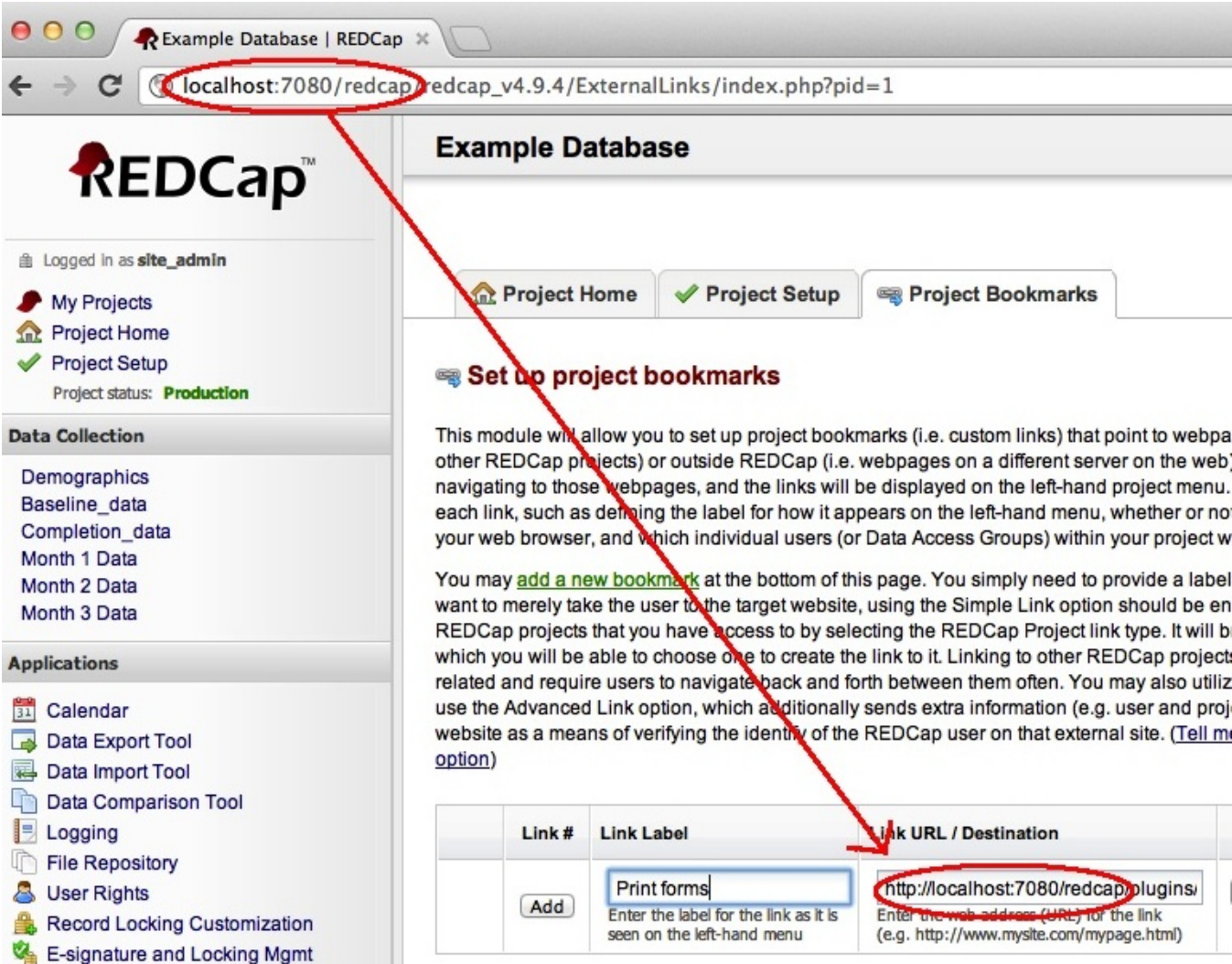
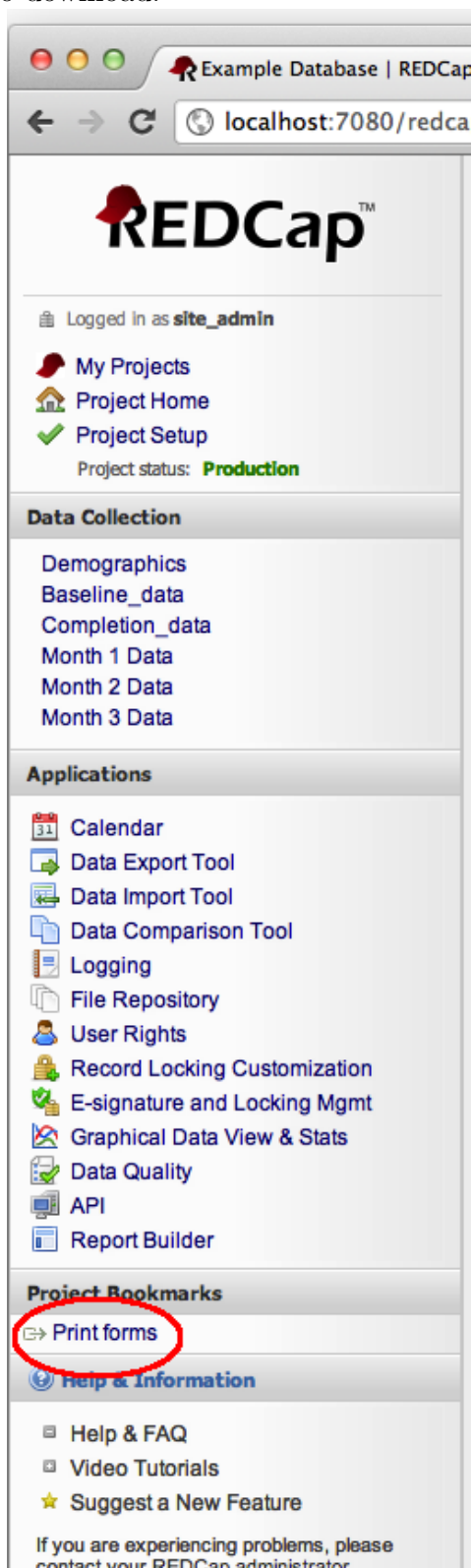


Figure 4: Select the 'Append project ID to URL' checkbox. If you do not select this, the plugin will not work. When you are done, click the 'add' button to create your new bookmark.

Link #	Link Label	Link URL / Destination	Link Type	User Access	Opens new window	Append record info to URL	Append project ID to URL	Delete
<input type="button" value="Add"/>	Print forms <small>Enter the label for the link as it is seen on the left-hand menu</small>	http://localhost:7080/redcap/plugins/ <small>Enter the web address (URL) for the link (e.g. http://www.mysite.com/mypage.html)</small>	Simple Link	<input checked="" type="radio"/> All users <input type="radio"/> Selected users	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

Figure 5: You should now see your Link Label in the sidebar under 'Project Bookmarks'. In our example we used 'Print forms' as our Link Label. If you select 'Print forms', a zip file of all the pdf forms in the project will start to download.





### 3 Advanced Configuration Features

The Advanced REDCap Form Plugin allows users to specify constraints on branching logic in order to print customized forms. So for example, we have a clinician who consistently knows whether the patient he is going to see is male or female before the visit. The clinician would like to have 2 bookmarks for printing his forms, one that prints forms for male patients and another that prints the forms for the female patients. We could use the Advanced Configuration Features to accomplish this by following the steps below.

#### 3.1 Creating a Constraint File to Print Forms Based on Branching Logic

Figure 6: The first thing we need to do is create a constraint file named `const_#.cfg` where `#` is our project id. In order to get your project id, go to the 'Project Home' page. Then look at your URL; at the end, you should see `?pid=` followed by a number. The number is your project id. So in our example, our project id is 1. We then create a file named `'const_1.cfg'`

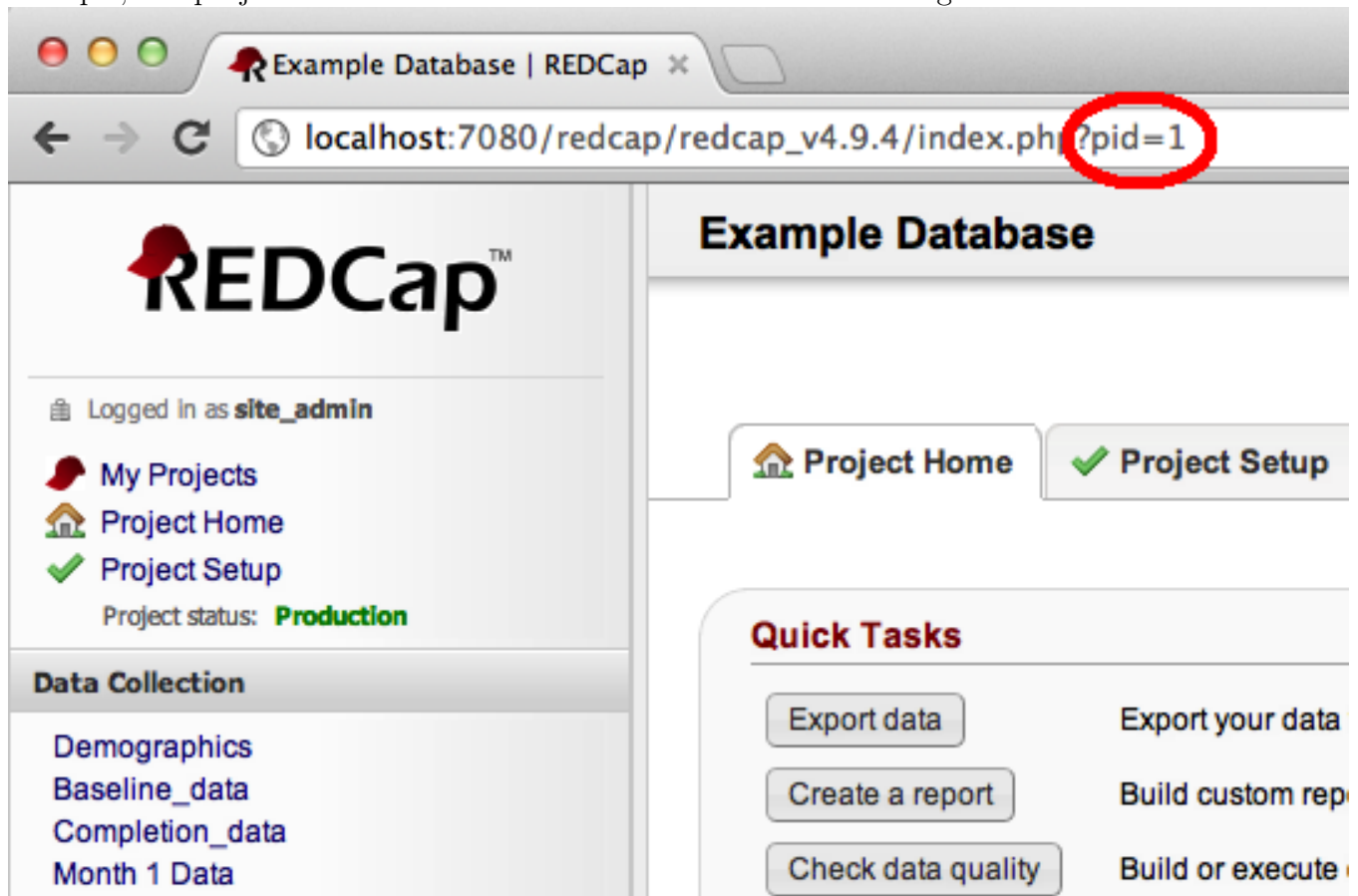




Figure 7: Open the constraint file in your favorite text editor. Now we need to decide on section names for each bookmark. Ideally we want to keep our section names short yet descriptive. For our project, we choose ‘male’ and ‘female’ . We then type ‘[male]’ and ‘[female]’ into our constraint file. Make sure to surround your section names with square brackets.

```

const_1.cfg + (~) - VIM
1 [male]
2 [female]
3

```

Figure 8: Now we need get the field name along with the indexes of the choices for the gender of the patient in order to specify the branching logic in our constraint file. Since we don’t know this offhand, we download the data dictionary and open it with Microsoft Excel. The data dictionary can be found on the ‘Project Revision History’ tab.

Example Database | REDCap

localhost:7080/redcap/redcap\_v4.9.4/ProjectSetup/project\_revision\_history.php?pid=1

**REDCap™**

Logged in as **site\_admin**

- My Projects
- Project Home
- Project Setup

Project status: **Production**

**Data Collection**

- Demographics
- Baseline\_data
- Completion\_data
- Month 1 Data
- Month 2 Data
- Month 3 Data

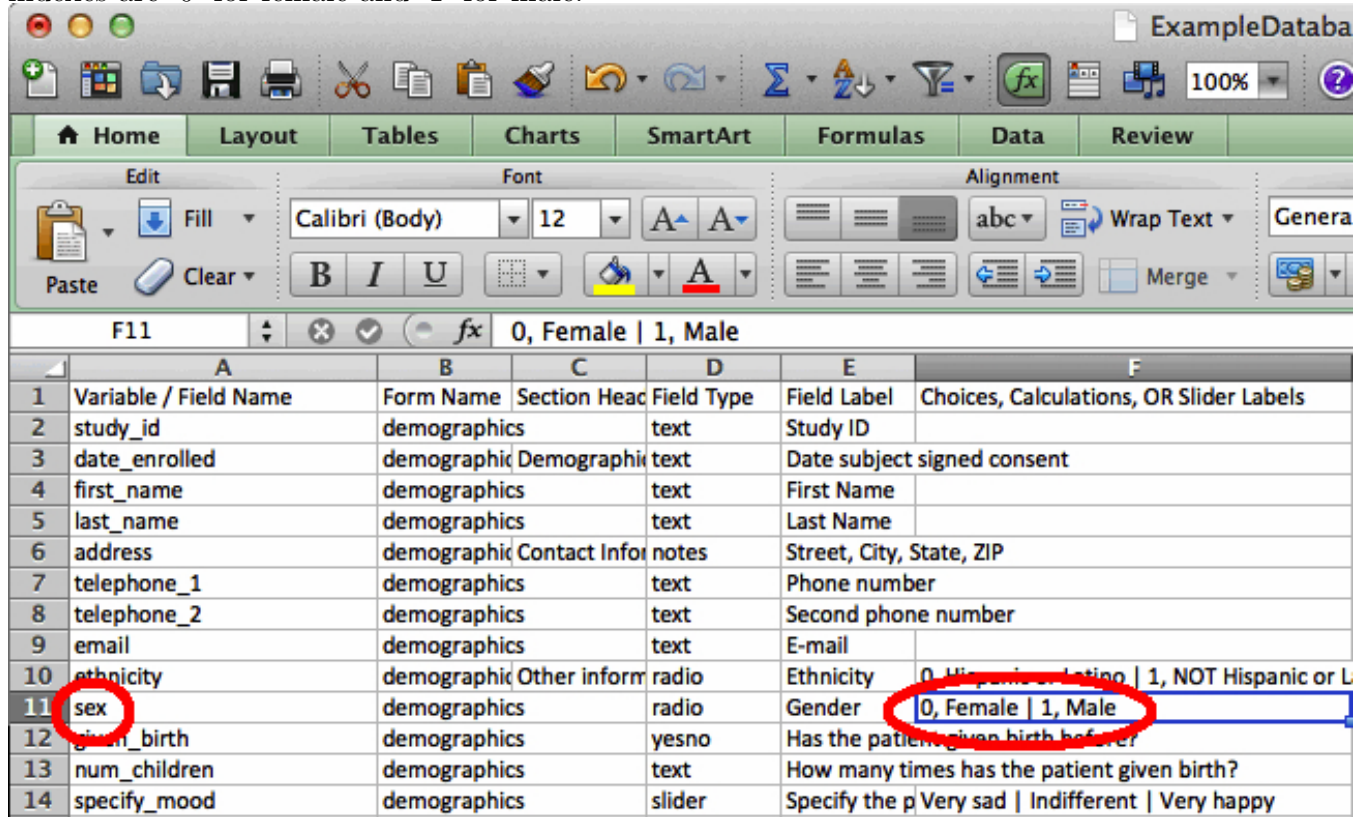
**Example Database**

Project Home | Project Setup | Other Functionality | **Project Revision History**

The tables below list information about when major changes and revisions were made to the project. The first table displays when the project was created, and if the project is in production, lists the time it was moved to production, revisions made to the project fields while in production. You may also download any of the Data Dictionaries from The table at the bottom displays general statistics with regard to the times of project changes and revisions.

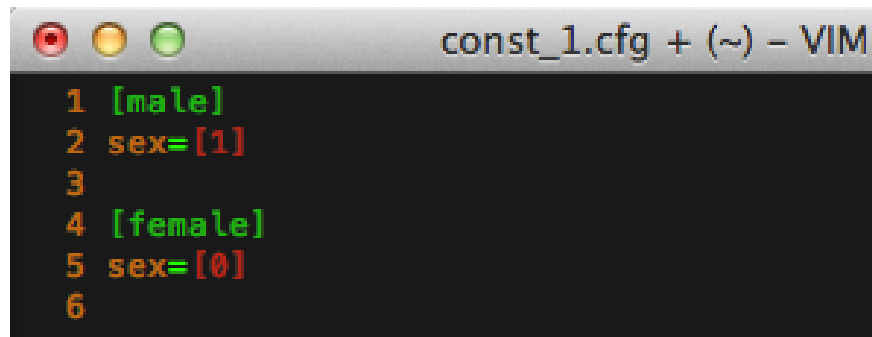
Project Revision History			
Created project	02/29/2012 9:37am	-	
Moved to production (current)	02/29/2012 9:37am	<a href="#">Download data dictionary</a>	
Draft Mode (current draft)	-	<a href="#">Download data dictionary</a>	

Figure 9: In Microsoft Excel, we can find the field name in column A and the corresponding indexes for choices in column F. In our example, the field name we are concerned with is ‘sex’ and the indexes are ‘0’ for female and ‘1’ for male.



	A	B	C	D	E	F
1	Variable / Field Name	Form Name	Section Head	Field Type	Field Label	Choices, Calculations, OR Slider Labels
2	study_id	demographics		text	Study ID	
3	date_enrolled	demographic	Demographic	text	Date subject signed consent	
4	first_name	demographics		text	First Name	
5	last_name	demographics		text	Last Name	
6	address	demographic	Contact Infor	notes	Street, City, State, ZIP	
7	telephone_1	demographics		text	Phone number	
8	telephone_2	demographics		text	Second phone number	
9	email	demographics		text	E-mail	
10	ethnicity	demographic	Other inform	radio	Ethnicity	0, Hispanic or Latino   1, NOT Hispanic or L
11	sex	demographics		radio	Gender	0, Female   1, Male
12	given_birth	demographics		yesno	Has the patient given birth before?	
13	num_children	demographics		text	How many times has the patient given birth?	
14	specify_mood	demographics		slider	Specify the p	Very sad   Indifferent   Very happy

Figure 10: Now that we have the field name and the indexes, we can add them to our constraint file. Since the index ‘1’ was associated with Male in our data dicationary, we write ‘sex=[1]’ under our ‘[male]’ section. Likewise, index ‘0’ was associated with Female, so we write ‘sex=[0]’ under our ‘[female]’ section and save our constraint file.



```

1 [male]
2 sex=[1]
3
4 [female]
5 sex=[0]
6

```

The finished constraint file needs to be placed on your server in the plugins/form/config\_files/ directory. If there is an existing constraint file with the same name, you need to merge them together, otherwise you may break existing bookmarks.

Figure 11: Finally, we need to add our new constraints as bookmarks. Enter an appropriate ‘Link Label’ and check the ‘Append project ID to URL’ checkbox. Then enter your base REDCap URL followed by ‘/plugins/form/index.php?const=section’, where section is the section name you specified in the constraint file. In our case, we would enter ‘http://localhost:7080/redcap/plugins/form/index.php?const=male’ for the male forms and ‘http://localhost:7080/redcap/plugins/form/index.php?const=female’ for the female forms. Once we hit ‘add’, our bookmarks should be displayed in the left sidepanel.

2	Print male forms	http://localhost:7080/redcap/plugins/form/index.php?const=male	Simple Link	<input checked="" type="radio"/> All users <input type="radio"/> Selected users	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Print female forms	http://localhost:7080/redcap/plugins/form/index.php?const=female	Simple Link	<input checked="" type="radio"/> All users <input type="radio"/> Selected users	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## 3.2 Using a Constraint File to Only Print Certain Forms

In certain cases, a user might want to create a bookmark that only prints certain forms in the project instead of printing all of the forms. This can be accomplished by using the constraint file as well.

Continuing with our example from the previous section, our clinician only wants to print the forms ‘Demographics’, ‘Baseline\_data’, ‘Completion\_data’, and ‘Month 1 Data’ for the male patients and the forms ‘Demographics’, ‘Baseline\_data’, ‘Completion\_data’, and ‘Month 2 data’ for the female patients.

Figure 12: In our constraint file, we use the ‘\_\_forms’ value to specify which forms we want to print for each bookmark. If ‘\_\_forms’ is not specified under a section, all the forms will print for that bookmark. So for our example, under ‘[male]’ we specify ‘\_\_forms=demographics, baseline\_data, completion\_data, month\_1\_data’ and under ‘[female]’ we specify ‘\_\_forms=demographics, baseline\_data, completion\_data, month\_2\_data’

```

1 [male]
2 __forms=demographics, baseline_data, completion_data, month_1_data
3 sex=[1]
4
5 [female]
6 __forms=demographics, baseline_data, completion_data, month_2_data
7 sex=[0]
8

```

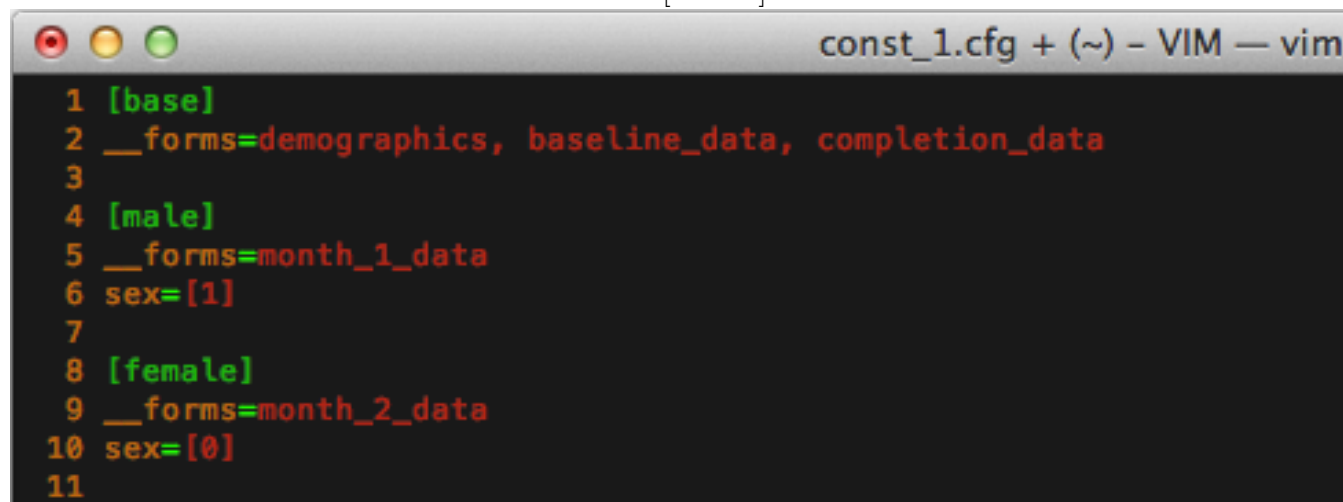
## 3.3 Global Constraints

For some projects, you might find that you have some constraints that you would like to apply to all bookmarks you create which have a section specified in the constraint file. We can use the global section name ‘[base]’ in order to accomplish this. Any constraints that we specify under the section ‘[base]’ will be applied to all section bookmarks for the project.

We will continue with our example from the previous section, where we specified which forms we wanted to print for male and female patients. We can see that the forms ‘Demographics’,

‘Baseline\_data’, and ‘Completion\_data’ were specified for both male and female patients. We can specify these forms under the ‘[base]’ section so we do not have to specify them individually in each section. To see the full example, please see the following figure.

Figure 13: To use global constraints in your constraint file, you need to use the ‘[base]’ section. Under the ‘[base]’ section, you can specify any constraint that you want for all sections in your project. In our case, we want to specify certain forms that will print for all sections. We add ‘\_\_forms=demographics, baseline\_data, completion\_data’ under ‘[base]’ in our constraint file. This will print the ‘Demographics’, ‘Baseline\_data’, and ‘Completion\_data’ forms for all sections in the constraint file, but we also want to print the ‘month\_1\_data’ for male patients and the ‘month\_2\_data’ for the female patients. We then add ‘\_\_forms=month\_1\_data’ under the ‘[male]’ section and ‘\_\_forms=month\_2\_data’ under the ‘[female]’ section.



```
1 [base]
2 __forms=demographics, baseline_data, completion_data
3
4 [male]
5 __forms=month_1_data
6 sex=[1]
7
8 [female]
9 __forms=month_2_data
10 sex=[0]
11
```

## 4 The PDF Forms

The following figures show the generated pdf versions of the ‘Demographics’ form from our ‘male’ and ‘female’ patient example using the ‘Example Database’ in REDCap.

You can see how the pregnancy questions are indented under the gender question on the female form. This is because the pregnancy questions have branching logic dependent on the response of the gender question. You will also notice that the male form does not have the pregnancy questions under the gender questions. This is because of how the branching logic is set up to only display those questions for female patients and how we configured the constraint file in the above example.

In both forms you can see how the plugin renders some of the different question types in REDCap. Also note that if we did not use a constraint file, the ‘Demographics’ form would print exactly the same as the female form, as there are no questions that are only asked if the patient is male in our example. Whenever a constraint file is not used, all questions will print and questions with branching logic will be indented.

Figure 14: The female Demographics form for the 'Example Database'.

Confidential

Clinician Name\_\_\_\_\_

Study ID\_\_\_\_\_ Date [M][M][D][D][Y][Y]

1/1

## Demographics

---

Study ID\_\_\_\_\_

### Demographic Characteristics

---

Date subject signed consent [Y][Y][Y][Y][M][M][D][D] First Name\_\_\_\_\_

Last Name\_\_\_\_\_

### Contact Information

---

Street, City, State, ZIP

Phone number\_\_\_\_\_ Second phone number\_\_\_\_\_

E-mail\_\_\_\_\_

### Other information

---

Ethnicity ☐ Hispanic or Latino ☐ NOT Hispanic or Latino ☐ Unknown / Not Reported

Gender ☐ Female ☐ Male

Has the patient given birth before? ☐ Yes ☐ No

How many times has the patient given birth?\_\_\_\_\_

Specify the patient's mood      Very sad      Indifferent      Very happy

Is patient taking any of the following medications? (check all that apply)

☐ Lexapro      ☐ Celexa      ☐ Prozac      ☐ Paxil      ☐ Zoloft

Date of birth [Y][Y][Y][Y][M][M][D][D] Age (years)\_\_\_\_\_ Height (cm)\_\_\_\_\_

Weight (kilograms)\_\_\_\_\_ BMI\_\_\_\_\_

### General Comments

---

Comments

Race

☐ American Indian/Alaska Native      ☐ Asian  
☐ Native Hawaiian or Other Pacific Islander      ☐ Black or African American  
☐ White      ☐ More Than One Race  
☐ Unknown / Not Reported

Form generated on 4/20/2012

Figure 15: The male Demographics form for the 'Example Database'.

Confidential

Clinician Name\_\_\_\_\_

Study ID\_\_\_\_\_ Date [M][M][D][D][Y][Y]

1/1

---

## Demographics

---

Study ID\_\_\_\_\_

### Demographic Characteristics

---

Date subject signed consent [Y][Y][Y][Y][M][M][D][D] First Name\_\_\_\_\_

Last Name\_\_\_\_\_

### Contact Information

---

Street, City, State, ZIP

Phone number\_\_\_\_\_ Second phone number\_\_\_\_\_

E-mail\_\_\_\_\_

### Other information

---

Ethnicity ☐ Hispanic or Latino ☐ NOT Hispanic or Latino ☐ Unknown / Not Reported

Gender ☐ Female ☐ Male

Specify the patient's mood      Very sad      Indifferent      Very happy

Is patient taking any of the following medications? (check all that apply)

☐ Lexapro      ☐ Celexa      ☐ Prozac      ☐ Paxil      ☐ Zoloft

Date of birth [Y][Y][Y][Y][M][M][D][D] Age (years)\_\_\_\_\_ Height (cm)\_\_\_\_\_

Weight (kilograms)\_\_\_\_\_ BMI\_\_\_\_\_

### General Comments

---

Comments

Race

☐ American Indian/Alaska Native      ☐ Asian

☐ Native Hawaiian or Other Pacific Islander      ☐ Black or African American

☐ White      ☐ More Than One Race

☐ Unknown / Not Reported

Form generated on 4/20/2012