



Session 2: Build a project from scratch

Biostatistics Research and Support Unit (BRU)

IGTP

October, 2025

Codebook

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3. Production
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Piping and Action Tags

1. Piping
2. Action Tags



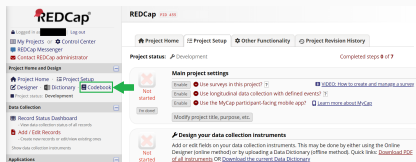
Definition

The codebook contains a list of all the fields that have been created in the project so far.



Access

Click on *Codebook* in the *Project Home and Design* section.





Functionalities

Variable/Field Name

Name of the field

Field Label

Label of the field

Field Attributes

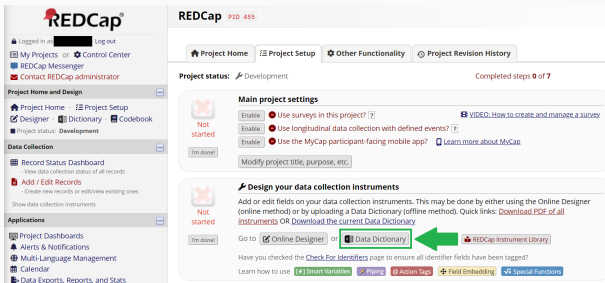
Type of the field, categories, limitations, equations...

#	Variable / Field Name	Field Label <small>Field Note</small>	Field Attributes (Field Type, Validation, Choices, Calculations, etc.)
Instrument: Demography (demography) ⌵ Collapse			
	1 record_id	Record ID	text
 	2 weight	Section Header: Demographic Fields Weight <small>kg</small>	text (number, Min: 45, Max: 150)
 	3 height	Height <small>cm</small>	text (number, Min: 145, Max: 240)
 	4 date_birth	Date of birth	text (date_dmy, Max: 2006-05-10)
 	5 sex	Sex	radio 0 Female 1 Male
 	6 medication	Medication	radio 0 Statins 1 Anticoagulants 2 Antidiabetics

Download

You can download the data dictionary (which contains the codebook information) from the *Project Setup*.

Project Setup » Design your data collection instruments » Data dictionary



REDCap®

Logged in as [redacted] Log out

My Projects or Control Center

REDCap Messenger

Contact REDCap administrator

Project Home and Design

Project Home » Project Setup

Designer » Dictionary » Codebook

Project status: Development

Data Collection

Record Status Dashboard

View data collection status of all records

Add / Edit Records

Create new records or edit/view existing ones

Show data collection instruments

Applications

Project Dashboards

Alerts & Notifications

Multi-Language Management

Calendar

Data Exports, Reports, and Stats

REDCap PID: 455

Project Home Project Setup Other Functionality Project Revision History

Project status: Development Completed steps 0 of 7

Main project settings

Enable Use surveys in this project? [?] VIDEO: How to create and manage a survey

Enable Use longitudinal data collection with defined events? [?]

Enable Use the MyCap participant-facing mobile app? Learn more about MyCap

Modify project title, purpose, etc.

Design your data collection instruments

Add or edit fields on your data collection instruments. This may be done by either using the Online Designer (online method) or by uploading a Data Dictionary (offline method). Quick links: [Download PDF of all instruments](#) OR [Download the current Data Dictionary](#)

Go to Online Designer or **Data Dictionary** REDCap Instrument Library

Have you checked the [Check For Identifiers](#) page to ensure all identifier fields have been tagged?

Learn how to use [Smart Variables](#) [R pipes](#) [Action Tags](#) [Field Embedding](#) [Special Functions](#)



Download

And click on *Download the current Data Dictionary*

REDCap PID 455

Logged in as [redacted] Log out

My Projects or Control Center
 REDCap Messenger
 Contact REDCap administrator

Project Home and Design

Project Home | Project Setup
 Designer | Dictionary | Codebook
 Project status: Development

Data Collection

Record Status Dashboard
 - view data collection status of all records

Add / Edit Records
 - Create new records or edit/view existing ones
 Show data collection instruments

Applications

Project Dashboards
 Alerts & Notifications
 Multi-Language Management
 Calendar
 Data Exports, Reports, and Stats
 Data Import Tool
 Data Comparison Tool
 Logging and Email Logging
 Field Comment Log
 File Repository
 User Rights and DAGs
 Data Quality
 REDCap Mobile App

External Modules | Manage | View Log

REDCap PID 455

Project Home | Project Setup | Online Designer | **Data Dictionary** | Codebook

VIDEO: How to use this page

This module may be used for making changes to the project, such as adding new fields or modifying existing fields, by using an offline method called the Data Dictionary. The Data Dictionary is a specifically formatted CSV file within which you may construct your project fields and afterward upload the file here to commit the changes to your project.

Click the 'Browse' or 'Choose File' button below to select the file on your computer, and upload it by clicking the 'Upload File' button. Once your file has been uploaded, changes will NOT immediately be made but will be displayed and checked for errors to ensure that all the formatting in your Data Dictionary is correct before official changes are made to the project. **Snapshot note:** A snapshot of your project's current Data Dictionary will be created automatically during the Data Dictionary upload process before committing the new Data Dictionary. The snapshot can later be accessed and downloaded from the Project Revision History page.

Need some help?
 If you wish to view an example of how your Data Dictionary may be formatted, you may download the [Data Dictionary demonstration file](#), or you may view the [Data Dictionary Tutorial Video](#) (10 min). For help setting up your Data Dictionary, you may also see the instructions listed on the [Help & FAQ](#).

Steps for making project changes:

- 1.) [Download the current Data Dictionary](#) Also download with other delimiters: [Comma \(,\)](#), [Tab](#), [Semicolon \(;\)](#)
- 2.) edit the Data Dictionary (see the [Help & FAQ](#) for help)
- 3.) Upload the Data Dictionary using the form below
- 4.) The changes will be made to the project after the Data Dictionary has been checked for errors

Upload your Data Dictionary file (CSV file format only)
 Format for min/max validation values for date and datetime fields: MM/DD/YYYY or YYYY-MM-DD

CSV delimiter of data file: [Comma \(,\)](#)

Seleccionar archivo Ningún archivo seleccionado

Upload File

Data entry

Data entry

1. Add/Edit Records



Definition



Access



Functionalities



Activity

2. Dashboard



Definition

2.1. Global dashboard



Access



Functionalities

2.2 Individual dashboard



Access



Functionalities

2.3 Dashboard legend



Definition



Definition

It serves to:

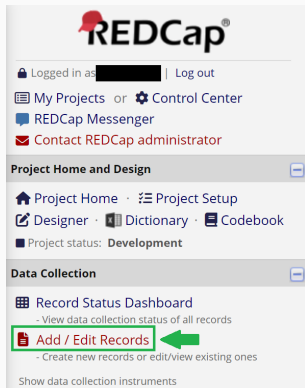
- Introduce a new record.
- Edit an existing record.

Add / Edit Records



Access

You can find this option under Data Collection.





Functionalities

Total records

- Select a record to edit/view
- Create a new record

Data Search

- Search for a record using the information from an existing field

Total records: 0	
Choose an existing Record ID	-- select record --
+ Add new record	

Data Search	
Choose a field to search <small>(excludes multiple choice fields)</small>	All fields
Search query <small>Begin typing to search the project data, then click an item in the list to navigate to that record.</small>	<input type="text"/>

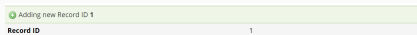


Activity: Add/Edit Records

1. Enter your first record.
2. What is the ID number of your first record?
3. Find your first record by weight.

Solution

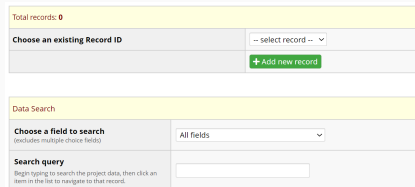
1. Enter your first record.
2. **What is the ID number of your first record?** The identifier of the first record is 1. Remember that REDCap by default gives a correlative name and you have not changed this option.



Adding new Record ID 1

Record ID
1

3. Find your first record by weight.



Total records: 0

Choose an existing Record ID

Data Search

Choose a field to search
(excludes multiple choice fields)

Search query
Begin typing to search the project data, then click an item in the list to navigate to that record.



Definition

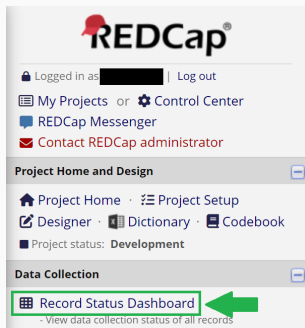
This is your project table, it lists all the existing records/responses and their status for each instrument/record of the project. Allows you to:

- Add a new record.
- Edit an existing record.
- View all project records (Global Dashboard).
- View a single project record (Individual Dashboard).

Global dashboard



Access it via the Data Collection section



Global dashboard



Functionalities

Customise the dashboard

Introduce a new record

Global visualization

Enter the individual visualization

Dashboard displayed: [Default dashboard]

Create custom dashboard

Displaying Data Access Group -- ALL --

Displaying record Page 1 of 1: "1" through "3" of 3 records

ALL (3) records per page

+ Add new record

Displaying: Instrument status only | [Lock status only](#) | [All status types](#)

Record ID	Demography
1	
2	
3	

You can click on any of the coloured buttons on the table to open an instrument for a specific record.

Individual dashboard



From the global dashboard, click on a record.

[+ Add new record](#)

Displaying: Instrument status only

Record ID	Demography
1	
2	
3	



Individual dashboard



Functionalities

Choose action for record

- Download pdf of record data for all instruments.
- Lock entire record.
- Rename the record.
- Delete the record.

Display the data of the record

Record Home Page

The grid below displays the form-by-form progress of data entered for the currently selected record. You may click on the colored status icons to access that form/event.

☒ Choose action for record

Record ID 1

Data Collection Instrument	Status
Demography	

Legend for status icons:

- Incomplete Incomplete (no data saved) ?
- Unverified
- Complete

You can click on any of the coloured buttons on the table to open an instrument of the record.

Dashboard legend





Definition



The legend of your table shows the status of each instrument/record of the project. It can be modified by answering the question at the end of the instrument **Complete?**

Record Home Page






The grid below displays the form-by-form progress of data entered for the currently selected record. You may click on the colored status icons to access that form/event.

 Choose action for record 

Record ID 1

 Data Collection Instrument	Status
Demography	

Legend for status icons:

-  Incomplete  Incomplete (no data saved) 
-  Unverified
-  Complete

- Grey: Default status when no data has been entered.
- Red: Status is set to Incomplete.
- Orange: Status is set to Unverified.
- Green: Status is set to Complete.

Management of a REDCap project

Management of a REDCap project

1. Project status



Definition

2. Development



Definition

3. Production



Definition

4. Analysis/Cleanup



Definition

5. Project completed



Definition



Definition

REDCap allows you to change the status of a project in order to maximise the security of your data. There are three statuses available:

- Development
- Production
- Analysis/Cleanup

Different status provide different levels of access to modifications, which are designed to safeguard your data at various stages.



You will also see how to mark a project as completed, even though REDCap does not consider this a status.



Definition

The **Development** status indicates that the project is under construction/tests.

Project Status Management



- **Properties:**

- Default status for new projects.
- Any **changes** made are applied immediately.



Definition

The **Production** status indicates that the project is ready for data collection.

Project Status Management



Development



Production
(current)



Analysis/Cleanup

• Properties:

- The project has to be moved from *development* to *production*.
Project setup » Move your project to production status



Not
started



Move your project to production status

Move the project to production status so that real data may be collected. Once in production, you will not be able to edit the project fields in real time anymore. However, you can make edits in Draft Mode, which will be auto-approved or else might need to be approved by a REDCap administrator before taking effect.

Go to

Move project to production



Definition

- **Properties:**

- The **changes** are not immediately visible. Changes must be made in Draft Mode and submitted to a REDCap administrator for approval.

Online Designer » Enter Draft Mode

NOTE: The project is currently in PRODUCTION status, and thus changes cannot be made in real time to the project as when in Development status. However, changes to the project may be drafted in DRAFT MODE, after which such changes will be reviewed and approved by a REDCap administrator. Once those changes are approved, you will then receive an email confirmation informing you that those changes have taken effect on your production project.

Would you like to enter DRAFT MODE to begin drafting changes to the project?



Enter Draft Mode



Remarks

- A project must be in Production before starting real data collection.



Definition

- **Properties:**

- A project can be moved from *production* to *development* under the approval of a REDCap administrator.

Other Functionality » Project Status Management » Move back to Development status

Project Status Management



Move to Analysis/Cleanup status →



← Move back to Development status

Move the project to Analysis/Cleanup status if data collection is complete. This will disable most project functionality, although all collected data will remain intact. Once in Analysis/Cleanup status, the project can be moved back to production status at any time.

Moved to production too soon? You may move the project back to development status, if needed. **(Administrators Only)**



Definition

The **Analysis/Cleanup** status indicates that data collection has been completed.

Project Status Management



• Properties:

- The project must be passed from *production* to *analysis/cleanup*.

Other Functionality » Project Status Management » Move to Analysis/Cleanup status

Project Status Management

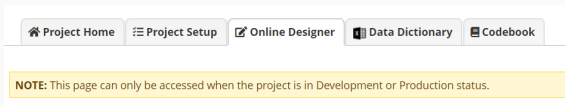




Definition

- **Properties:**

- **Changes** cannot be made. The 'Online designer' section is deactivated.



- Many of the functions are deactivated: surveys, alerts, etc...
- It is not allowed to add new records.
- It allows you to edit existing records.



Definition

- **Properties:**

- The project can be moved from *analysis/cleanup* to *production* under the approval of a REDCap administrator.

Other Functionality » Project Status Management » Move back to Production status



Completed project



Definition

It is not considered a REDCap status, it indicates that the project has been completed.

- **Properties:**

- It is possible to move a project to *completed* in any of the three previous states:

Other Funcionality » Project Status Management » Mark project as Completed



- The project becomes inaccessible.
- It will be removed from everyone's list of projects, and can only be accessed by selecting 'Show Completed Projects' in 'My projects'.

Branching logic

Branching logic

1. Branching logic



Definition

2. Drag-N-Drop Logic Builder



Definition



Configuration



Activity

3. Advanced Branching Logic Syntax



Definition



Configuration



Build a logical condition




Example



Activities



Definition

Branching logic  is useful for showing or hiding fields according to a logical condition based on the values of existing fields.

In other words, it is used when certain fields in the project should only be displayed under specific conditions. For example, the “Pregnancy” field would only be displayed for female participants.



Definition

- **Properties:**

1. It is based on fields previously defined.
2. It can only work with fields from the same project.

- **Methods:** REDCap provides two methods to create a branching logic:

1. Drag-N-Drop Logic Builder.
2. Advanced Branching Logic Syntax.



Definition

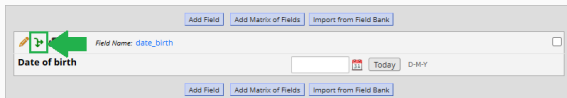
The **Drag-N-Drop Logic Builder** method is the simplest form of branching logic.

- **Properties:**

- No code is required for its implementation.
- It works by adding and selecting the necessary field names for the logical condition.
- It offers less flexibility than the *Advanced Branching Logic Syntax*.

Configuration

1. Access the "Branching Logic" option of a field:



2. Select the method *"Drag-N-Drop Logic Builder"*.

Drag-N-Drop Logic Builder

Configuration

- To construct a logical condition, you must drag and drop the necessary fields, after which the available logical rules will then appear.

Add/Edit Branching Logic

Branching Logic may be employed when fields/questions need to be hidden under certain conditions. If branching logic is defined, the field will only be visible if the conditions provided are true (i.e. show the field only if...). You may specify those conditions in the text box below for the Advanced Branching Logic Syntax or by choosing the Drag-N-Drop Logic Builder method, which allows you to build your logic in a much easier fashion by simply dragging over the options you want. You may switch back and forth between each method if you wish, but please be aware that since the advanced logic allows for greater complexity, it may not be able to be switched over to the Drag-N-Drop method if it becomes too complex.

Choose method below for the following field: **date_birth - Date of birth**

☐ **Advanced Branching Logic Syntax** How to use: [Advanced Branching Logic](#) [Let Smart Variables](#) [Add Special Conditions](#)

Show the field ONLY if...

[height] = "

Test logic with a record: select record

[Clear logic](#)

— OR —

☒ **Drag-N-Drop Logic Builder**

Field choices from other fields
(drag a choice below to box on right)

- record_id = (define criteria)
- weight = (define criteria)
- height = (define criteria)
- sex = female (0)
- sex = male (1)
- medication = Statins (0)
- medication = Anticoagulants (1)
- medication = Antidiabetics (2)
- sex = (define criteria)

→

Show the field ONLY if...

☒ ALL below are true
☐ ANY below are true

height = ▼ ×

Drag and Drop

[Clear logic](#)



Remarks

- Multiple fields can be added to the condition.
- There are two options: "ALL below are true" or "ANY below are true."



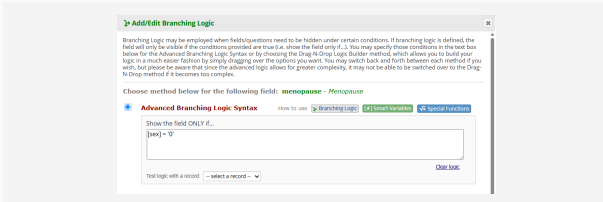
Activity: Drag-N-Drop Logic Builder

1. Create a field called *Menopause* with options: No / Yes.
2. Make sure that the field *Menopause* is only shown for female patients.
3. Test it to verify that the logic works correctly.

Drag-N-Drop Logic Builder

Solution

1. Create a field called *Menopause* with the following options: No / Yes.
Add Field >> Drop-down or Radio Buttons
2. Make sure that the field *Menopause* is only displayed for female patients.



Add/Edit Branching Logic

Branching Logic may be employed when fields/questions need to be hidden under certain conditions, if branching logic is defined, the field will only be visible if the conditions provided are true (i.e. show the field only if...), You may specify those conditions in the text box below for the Advanced Branching Logic Syntax or by choosing the Drag-N-Drop Logic Builder method, which allows you to build your logic in a much easier fashion by simply dragging over the options you want. You may switch back and forth between each method if you wish, but please be aware that since the advanced logic allows for greater complexity, it may not be able to be switched over to the Drag-N-Drop method if it becomes too complex.

Choose method below for the following field: **menopause - Menopause**

☒ **Advanced Branching Logic Syntax** How to use [Branching Logic](#) [Smart variables](#) [Special functions](#)

Show the field ONLY if...

[yes] = 'Y'

Test logic with a record: select a record - [Clear logic](#)



Remarks

- The *Drag-N-Drop Logic Builder* writes the logic in the *Advanced Branching Logic Syntax*.

Drag-N-Drop Logic Builder

Solution

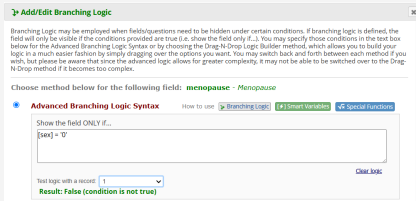
3 Test it to verify that the logic works correctly.



There are two options to see if a branching logic works, using:

- The data entry
- The editor

Advanced Branching Logic Syntax >> Test logic
with a record



Add/Edit Branching Logic

Branching Logic may be employed when fields/questions need to be hidden under certain conditions. If branching logic is defined, the field will only be visible if the conditions provided are true (i.e. show the field only if...). You may specify those conditions in the text box below for the Advanced Branching Logic Syntax or by choosing the Drag-N-Drop Logic Builder method, which allows you to build your logic in a much easier fashion by simply dragging over the options you want. You may switch back and forth between each method if you wish, but please be aware that since the advanced logic allows for greater complexity, it may not be able to be switched over to the Drag-N-Drop method if it becomes too complex.

Choose method below for the following field: **menopause - Menopause**

☒ **Advanced Branching Logic Syntax** How to use: [Branching Logic](#) [Smart Variables](#) [Special Functions](#)

Show the field ONLY if...

[sex] = '0'

Test logic with a record: 1 [Clear logic](#)

Result: False (condition is not true)



Definition

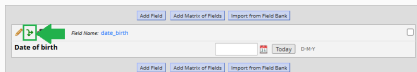
The **Advanced Branching Logic Syntax** method is the most flexible and complex of the two methods.

- **Properties:**

- Code is necessary for its implementation.

Configuration

1. Click on the "Branching Logic" icon:



2. Select the *Advanced Branching Logic Syntax* option.
3. Build the desired logical condition.

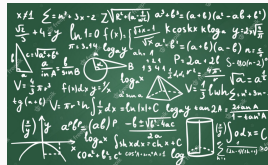
√ Basic operators of logical language in REDCap

Logics

- "and": and
- "or": or
- "equal": =
- "different": <>

Mathematics

- Standards: +, -, /, *
- Compare: >, <, >=, <=
- Order: ()



- For more complex operations visit:

https://redcap.igtp.cat/redcap_v14.5.42/DataEntry/special_functions_explanation.php

√* Build a logical condition

- The result of a logical condition is a boolean: “True” or “False” (the condition has been met or not).
- Elements of a logical condition:

1. Define the **field**.

To use a REDCap field, enclose the field name, not the field label, in square brackets []. Example: [age]

2. Define the **operator**. Example: >
3. Define the **comparison value**. Example: 18

[age]>18



Remarks

- To include multiple fields in a condition, use logical connectors such as **and** or **or**.



Example: Build a logic condition

1. **Logic context:** Display a field only if the value of sex is Female (coded as "0").

Elements logic condition:

- Field: `[sex]`
- Operator: `=`
- Comparison value: `"0"`

Logic condition:

```
[sex]="0"
```



Example: Build a logical condition

- 2 **Logic condition:** Show a field if sex = Female (0) and menopause = Yes (1).

Logic condition: `[sex]="0" and [menopause]="1"`

- 3 **Logic condition:** Show a field if the height is greater than or equal to 170 cm, or if the weight is less than 65 kg **and** sex is Female (coded as 0).

Logic condition: `([height]≥170 or [weight]<65) and [sex]="0"`

- 4 **Logic condition:** Show a field if the height value is not missing.

Logic condition: `[height]<>" "`



Activity: Basic logic condition

Logic condition: If the age is greater than 65 years old, show the EPOC field.

Elements logic condition

- Field: `[age]`
- Operator: `>`
- Comparison values: `65`

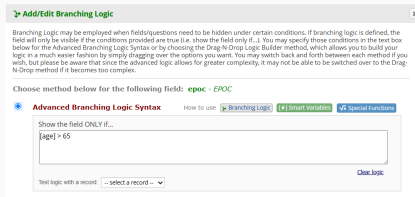
Logic condition:

`[age] > 65`

Advanced Branching Logic Syntax

Solution

1. Click the *Branching Logic* icon on the *EPOC* field.
2. Select the option: "*Advanced Branching Logic Syntax*"
3. Add the following logic condition: `[age] > 65`



Add/Edit Branching Logic

Branching Logic may be employed when fields/questions need to be hidden under certain conditions. If branching logic is defined, the field will only be visible if the conditions provided are true (i.e. show the field only if...). You may specify those conditions in the text box below for the Advanced Branching Logic Syntax or by choosing the Drag-N-Drop Logic Builder method, which allows you to build your logic in a much easier fashion by simply dragging over the options you want. You may switch back and forth between each method if you wish, but please be aware that since the advanced logic allows for greater complexity, it may not be able to be switched over to the Drag-N-Drop method if it becomes too complex.

Choose method below for the following field: **epoc - EPOC**

☒ **Advanced Branching Logic Syntax** How to use: [Branching Logic](#) [Smart Variables](#) [Special Functions](#)

Show the field ONLY if...

`[age] > 65`

Text logic with a record: -- select a record -- [Clear Logic](#)



Warning

If data is entered before adding a branching logic, REDCap may issue a warning that the field for which you just entered data requires that the field named "medication" be hidden from view. You can click OK to hide the field and erase the current value.



Activity: Logic condition checkbox

Logic context: If the patient is taking statins, specify the type in a new field called "statins".

Elements logic condition

- Field: `[medication(0)]`
- Operator: `=`
- Comparison values: `"1"`

Logic condition: `[medication(0)]="1"`



Solution

1. Use the *medication* field with the following options: 0 = Statins, 1 = Anticoagulants, 2 = Antidiabetics.
2. Create an open-text field named *statins*.
3. Click the *Branching Logic* icon on the *statins* field.
4. Choose the option: "Advanced Branching Logic Syntax"
5. Add the following logic condition: `[medication(0)]="1"`

External modules

01. External modules



Definition



Configuration



Activity



Definition

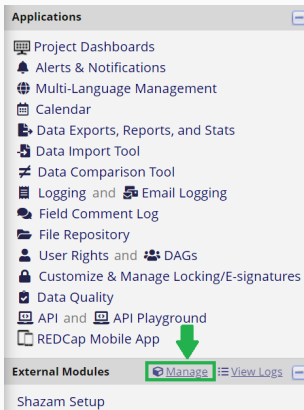
External modules are individual packages (modules) of software that can be downloaded and installed by a REDCap administrator. These modules can extend the current functionality of REDCap and provide customisations and enhancements to the existing REDCap behaviour and appearance at the system or project level.

- **Properties:**

1. Before they can be used, REDCap administrators must enable each module.

Configuration

1. Access to Project setup
2. Click External modules



Configuration

3. Select View available modules
4. Tick the module(s) you want to **enable/activate**

If the module is not available in the list, you will need to request the REDCap administrator to enable it at the system level.

External Modules - Project Module Manager

External Modules are individual packages of software that can be downloaded and installed by a REDCap administrator. Modules can extend REDCap's current functionality, and can also provide customizations and enhancements for REDCap's existing behavior and appearance at the system level or project level.

As a user with Project Setup/Design privileges in this project, you can modify the configuration (if applicable) of any enabled module. Note: Only REDCap administrators are able to enable or disable modules.

DISCLAIMER: Please be aware that External Modules are not part of the REDCap software and instead are sold as packages that, in most cases, have been created by software developers or other REDCap institutions. We assure that the entire risk with the quality and performance of the results as it is used in your REDCap project is borne by you and your local REDCap administrator. If you experience any issues with a module, your REDCap administrator should contact the author of that particular module.

 [View available modules](#) [Export Module Settings](#) [Import Module Settings](#)

View action tags provided by external modules. [Learn More](#)



Activity: Form Field Tooltip Module

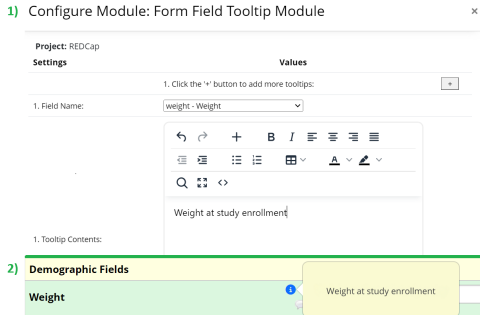
1. Use the external module Form Field Tooltip Module to inform that the weight must be recorded at the time of study entry.

External modules

Solution

1. Use the external module Form Field Tooltip Module to inform that the weight must be recorded at the time of study entry.

Project setup >> External modules>> Form Field Tooltip Module >> Weight



The screenshot shows the 'Configure Module: Form Field Tooltip Module' window. It is divided into two main sections: '1) Configure Module: Form Field Tooltip Module' and '2) Demographic Fields'.

1) Configure Module: Form Field Tooltip Module

- Project:** REDCap
- Settings** (left tab) and **Values** (right tab) are visible.
- Under **Values**, there is a text input field with the value 'weight - Weight' and a '+' button to add more tooltips.
- Below this, there is a '1. Field Name:' label and a dropdown menu showing 'weight - Weight'.
- A rich text editor is present with various formatting icons (bold, italic, underline, list, link, etc.). The text 'Weight at study enrollment' is entered in the editor.
- At the bottom, there is a '1. Tooltip Contents:' label.

2) Demographic Fields

- A list of fields is shown, with 'Weight' highlighted in green.
- A yellow tooltip box is shown next to the 'Weight' field, containing the text 'Weight at study enrollment'.

Smart variables

01.Smart variables



Definition



Example



Definition

[⚡] **smart variables** are dynamic variables that are included by default in REDCap and allow us to refer to characteristics of the project that are not stored in any specific field.



Definition

- **Examples:**

Smart variable	Action	Result
[user-name]	Name from the user	laia_garcia
[user-fullname]	Name and surname from the user	Laia García
[record-name]	Record name	1



Activity: Smart variables

Logic context: If the user is Laia García, the medication field should be shown.

Elements logic condition

- Field: `[user-fullname]`
- Operator: `=`
- Comparison values: `"Laia García"`

Logic condition: `[user-fullname]="Laia García"`



Solution

1. Locate the *medication* field.
2. Click the *Branching Logic* icon on the *medication* field.
3. Choose the option: "Advanced Branching Logic Syntax"
4. Add the following logic condition: `[user-fullname]`="Laia García"



Warning


If data is entered before adding a branching logic, REDCap may issue a warning that the field for which you just entered data requires that the field named "epoc" be hidden from view. You can click OK to hide the field and erase the current value.

Piping and @Action Tags

Piping and @Action Tags

01. Piping

 Definition

 Build a piping

 Example

02. Action tags


 Definition

 Tips

 Activity



Definition

Using  **Piping** in REDCap enables you to “inject” previously collected field values into a text, such as field labels or headers.

- It gives us greater precision and control over the wording of the questions. For example, you can personalise the text at the end of a questionnaire by adding the name after completion.



Definition

- Properties:

1. It is based on fields entered previously.
2. It only works with fields from the same project.
3. It can be used in:
 - Field labels.
 - Field footnotes.
 - Section headers or Matrix of fields.
 - Labels for single response, multiple response or regulatory bar field options.
 - Surveys: instructions, finalisation text, invitation, tail and URL.
 - @DEFAULT



Build a piping

1. Define a field
2. In a different field, add the value of the first field.
3. Use the field name (not the field label) in one of the options previously shown. Example: `[date_birth]`



Activity: Piping

Logic context: Add weight and height in the field note of the BMI field.

Solution

1. Go to the BMI field and add to the field note: "Height: [height]- Weight: [weight]"

Variable Name (utilized in logic, calcs, and exports)
 ☐ Enable auto naming of variable based upon its Field Label?
ONLY letters, numbers, and underscores

How to use Smart Variables Piping Field Embedding

Required?* ☒ No ☐ Yes
* Prompt if field is blank

Identifier? ☒ No ☐ Yes
Does the field contain identifying information (e.g., name, SSN, address)?

Custom Alignment
Align the position of the field on the page

Field Note (optional)
Small reminder text displayed underneath field

2. The result is:

BMI



27

Height:150-Weight:60

[View equation](#)



Definition

Action tags (@ Action Tags) are an excellent way to personalise your project.

- **Properties:**

- They are special terms that begin with the symbol «@».
- Each action TAG has a predefined action in the field.
- They must be located in the field annotation.

- **Limitations:** There is no “technical” limitation for a single field, but if you use more than one action make sure you put a space or a line break between them.

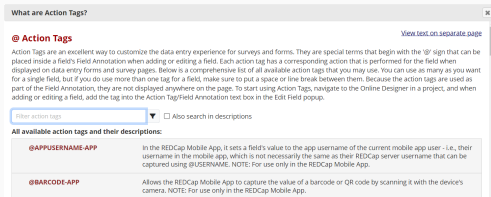


Tips

- **Check available actions:** by clicking «@ Action Tags» available in the field annotation.



It shows the name, a description of the action it performs, and instructions on how to use it.





Tips

- Some of the most common ones are:
 - **@HIDDEN**: The field will not be displayed.
 - **@TODAY**: Assigns by default today's date in a date field.
 - **@DEFAULT**: Assigns a default value to a field. For example:
 - Date by default: «**@DEFAULT** = '2007-12-25'»
 - Option(category) by default: «**@DEFAULT** = '1'»



Activity: @Action Tags

- Create the variable *Registry creation date* and assign today's date by default.
- Set the default value of the *Menopause* variable to "Yes".
- A new patient comes in. What happened?

Solution

1. Create the variable *Registry creation date* and assign today's date by default.

Mandatory:

- Field type: *Text Box*
- Field label: Registry creation date
- Variable name: date_registry

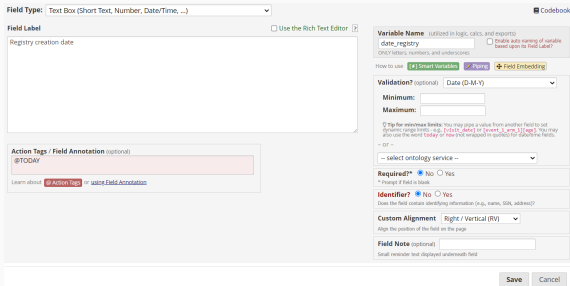
Conditions:

- Validation: Date (D-M-Y)

Others

- Annotation of the field:

@TODAY



The screenshot shows the configuration interface for a variable named 'date_registry'. The 'Field Type' is set to 'Text Box (Short Text, Number, Date/Time, ...)'. The 'Field Label' is 'Registry creation date'. The 'Variable Name' is 'date_registry'. The 'Validation' is set to 'Date (D-M-Y)'. The 'Annotation' is '@TODAY'. The 'Field Note' is 'Small reminder text displayed underneath field'. The 'Save' button is highlighted.



Warning

- Each time you save the instrument the date will be updated to that day.

Solution

2 Set the default value of the *Menopause* variable to "Yes".

Field Type: Multiple Choice - Radio Buttons (Single Answer)

Field Label: Menopause

Choices (one choice per line):
0, No
1, Yes

Variable Name: menopause

Required?: ☒ No ☐ Yes

Identifier?: ☒ No ☐ Yes

Custom Alignment: Right / Vertical (RV)

Field Note (optional):

Codebook

How to use: [Smart Variables](#) [Piping](#) [Field Embedding](#)

ONLY letters, numbers, and underscores

Enable auto naming of variable based upon its Field Label?

Does the field contain identifying information (e.g., name, SSN, address)?

Align the position of the field on the page

Small reminder text displayed underneath field

How do I manually code the choices?

Learn about [@Action Tags](#) or [using Field Annotation](#)

Save Cancel

Solution

3 A new patient comes in. What happened?

An error message appears. The variable *Menopause* is not shown because the record has not been identified as corresponding to a female, yet it has an assigned value. Remove the **@DEFAULT** action tag from the *Menopause* field to make the error disappear.

redcap.igtp.cat dice

ERASE THE VALUE OF THE FIELD "menopause" ?

The current field for which you just entered data requires that the field named "menopause" be hidden from view. However, that field already has a value, so its value might need to be reset back to a blank value.

Click OK to HIDE this field and ERASE its current value. Click CANCEL if you DO NOT wish to hide this field or erase its current value.



Warning

- Be careful when using **@DEFAULT** in fields that have branching logic.

**Thank you and see you
tomorrow!**

