

2.2.2 Using Form Designer

Designing Forms is easy with Form Designer. You can still upload a Form Template spreadsheet (which is required for some of the more complex functions) but with Form Designer, you can create a form right in the user interface. See **Using the Form Template** for information about using the spreadsheet method of building forms. **Note:** You can also upload a Form Template and then make changes in Form Designer. However, if you do this and try to download the form template again, you will lose some formatting inside the spreadsheet file (but it will still be fully functional).

Quick Start

1. Enter Form Designer:

- 1. Click the **Design** button under your study card on the **My Studies** screen.
- 2. To add a new Form, click **+Add a Form**. If you want to use an existing Form, go to the next step.
- 3. Click the Form Card.
- 4. Click the **Design** button to enter Form Designer.

2a. Add an Item to the Form:

- 1. Click the + button.
- 2. Enter the text of your question.
- 3. Click **+Add Question**.
- 4. Select the icon for the type of response you want for the question.
- 5. Customize your question settings, skip logic, and validation criteria as needed. For multiple choice questions, replace **Option 1**, **Option 2**, etc. with your choices.
- 6. Repeat as needed.

2b. Create a Group of Items:

- 1. Click the item to select it. A blue outline appears to indicate that the item is selected.
- 2. Click the **Create group with selected questions** button.
- 3. Click the + button within the group to add a new item or drag and drop an item into the group.
- 4. Repeat as needed.

Note: You can also hold the **Ctrl** button, select multiple items, and then click the **Create group with selected questions** button. If you start to drag something and then decide not to move it, click the **Esc** button.

3. Save Your Work

Click **Save Draft** to save your Form.

4. Preview Your Form

Click the **Preview** icon to preview your Form.

5. Exit Form Designer

Click the X to exit Form Designer.

6. Add the Form to Your Study

- 1. Click the **Menu** icon next to your draft.
- 2. Select **Add to Study**.

Form Designer Details

Layouts

A Layout determines the appearance of a Form, specifically, how items appear on the Form.

You Can Specify a Layout to Display:

- A single item per page or multiple items per page
- Each item in a separate line or items in a grid

To Select a Layout:

Click **Layout & Settings**. New Forms are set to **Grid - multiple pages** by default. Grids are ideal for adding multiple items in a single line. **Best Practices:**

- In general, the **Simple** style is best for participant-facing Forms. The **Grid** style is useful for Forms with a lot of information and can deliver a better user experience for research professionals.
- If you are not sure how many pages you want the Form to have, consider using the **multiple page** layout, as you can specify the number of pages (including a single page) while the **single page** layout restricts you to one page.

Layout Options:

- **Simple single page:** Items appear in rows on a single page. In the Form Definition spreadsheet, this is configured by leaving the **Style** column blank.
- **Simple multiple pages:** Items appear in rows with each item on a separate page. In the Form Definition spreadsheet, this is configured by entering pages in the **Style** column.
- **Grid single page**: Items appear in columns on a single page. In the Form Definition spreadsheet, this is configured by entering **theme-grid** in the **Style** column.
- **Grid multiple pages:** Items appear in columns with each on a separate page (default). In the Form Definition spreadsheet, this is configured by entering **pages theme-grid** in the **Style** column.









Icons

The following icons appear on in the upper-left corner of the Form Designer screen:

Icon Action

Preview Form

Expand/Collapse Questions

Create Group with Selected Questions

Delete Selected Items

Duplicate Selected Questions

The following icons appear on the right-hand side of each item:

Icon Action

View/Change Question Settings Note: You can also click this icon to expand/collapse settings

Delete Question Note: This action cannot be undone

Duplicate Question

Add Question to Library

Layout Groups

Layout groups are a set of items that are grouped together on a Form. This feature is optional, and you can decide to include/exclude layout groups based on how you want the Form to look. These should not be confused with item groups, which are internal groups used in the database and data extracts. To group items together, select each item on the top left item type icon, and then click the **Group** button. Once a group has been created, you can drag-and-drop items into that group. To use group settings, click the **Settings (Gear)** button in the group header.

Within Group Settings, You Can:

- Make items in the group appear on the same page
- Specify the number of columns of items in the group
- Create a repeating group
- Define skip logic for the entire group

Content Library

Use the Content Library to add pre-made items to your forms. Instead of creating the same item each time you want to add it to a form, save the item or group of items in the Content Library to add

it to the form instantly. For more information, see: Content Library.

Preview

Click the **Preview** button to preview your form.

Versions and Drafts

Click the **Save Draft** button in the upper right-hand corner to save your Form. This does not:

- Create a new version
- Include the draft when you publish your study
- Appear on the Activity Log

Your updated design appears on your Form card in Study Designer under **Drafts**. Your draft is labelled (latest), and if you have multiple drafts, it is moved to the top of the list.

To Create Multiple Drafts:

- 1. Open the Form in Form Designer.
- 2. Click Layout & Settings, and change the value in the Version number field.
- 3. Click **Save Draft**.
- 4. Repeat the process for each draft.

To Discard a Draft:

Click the **Menu** button next to the draft you want to delete, and selecting **Discard.** *Note: Discarded drafts are not retrievable.*

To Save a New Version:

- 1. Click **Layout & Settings**, and change the number in the **Version number** field.
- 2. Click Save Draft.
- 3. Exit Form Designer.
- 4. Click the **Menu** icon next to the draft you want to make a version.
- 5. Select **Add to Study**. Your Form becomes a version, and is no longer displayed in the **Drafts** section of the Form Card in Study Designer. This version is included when you publish your study.

To Overwrite an Existing Version:

- 1. Do *not* change the version number.
- 2. Click **Save Draft**.
- 3. Exit Form Designer.
- 4. Click the **Menu** icon next to the draft you want to make a version.
- 5. Select **Add to Study**. Your pre-existing Form version is replaced by your new version, and is no longer displayed in the **Drafts** section of the Form Card in Study Designer. This version is included when you publish your study.

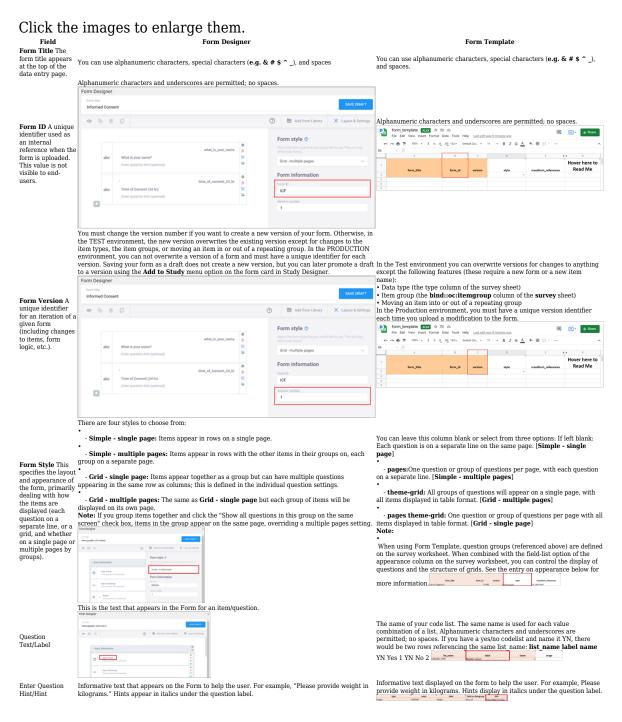
Note: If you want to make a new version of a Form (and not overwrite an existing Form), make sure to change the version number in the **Layout & Settings** panel.

Form Designer Limitations

Currently, Form Designer does not support all of the functionality that is available in OpenClinica Forms. Instead, use the Form Template to take advantage of these features. Specifically:

- You cannot use cross-form logic in Form Designer.
- You can add edit checks in Form Designer but hard edit checks must be defined in the Form Template.
- There is no functionality for cascading selects (i.e. you cannot restrict the list of options available in the next item based on the previous selection. You can still add conditional fields to determine whether the next item appears at all.)

Form Designer and Form Template Fields



The internal name of the item, as used in the database. This is used to generate the item object identifier (OID)This does not appear during data entry. Alphanumeric characters and underscores

are allowed

Item Name/Name

Item Group

Туре

The internal name of the group that the item is in, as used in the database. This is used to generate the item object identifier (OID). Alphanumeric characters and underscores are allowed; spaces are

not allowed.

The data type of the item (e.g. select one, select multiple, etc.)

Single-select: Allows the user to select one response from a list defined in the Form. Enter options in the Item Details.

Single-select (external list): Allows the user to select one response from a list defined in a CSV file. Upload the file in the Item Details. This is ideal for long lists.

- Multi-select: Allows the user to select one or more responses from a list defined in the Form Enter options in the Item Details.

- Text: Allows the user to enter a text value. Select the text icon. Text is up to 3,999 characters

- Integer: Allows the user to enter an integer value. Select the integer icon.

- Decimal: Allows the user to enter a decimal value. Select the decimal icon

Calculate: Calculates a value and does not display it to the user by default. Select the calculate icon.

Date: Allows the user to enter a date value. Select the date icon.

Note: Displays a message to the user without collecting a value. Select the note icon.

File: Allows the user to attach a file. Select the file icon

- Image: Allows the user to attach a .png or .gif file. Select the image icon.

Audio: Allows the user to attach an audio file. Select the audio icon

Video: Allows the user to attach a video file. Select the video icon

- Layout Group (non-repeating): Allows users to group items together to alter the layout of the Form. Select one or more items and click the Group button.

- Layout Group (repeating): Allows user to group items together to alter the layout of the Form and allow the user to enter values for the items multiple times, if necessary. Select one or more items and click the Group button. Then click the Settings (Gear) icon for the group and click

- Video: Allows the user to a

the Repeat this group if necessary check box.

A short description of the item that can be used to reference it in tables. This description can be up to 40 characters. You cannot use special characters. If this is not defined for an item in a table, the

Item Name appears instead.

A long description of the item that can be used to define the data that the item/question contains. This is not displayed on the Form during data data entry. The text can be up to 3,999 characters. You cannot use special characters. The description is included in some data extract formats.

Item Description

The unique name of the item. This is not displayed during data entry, but is The unique name of the item. This is not displayed during data entry, but is how the data is referenced in the database. Allows alphanumeric characters and underscores; spaces are not allowed. It is recommended that only lowercase letters, digits, and underscores are used in item names. Once an item name is defined in this spreadsheet and the form is uploaded into OpenClinica, the name should not be changed to use different letter case when the form is uploaded again. For example, if item I is part of the first form upload, this name should not be changed to ITEMI or ItemI when the form is subsequently uploaded. Any change from/to upper/lower case in an item name will result in a form or publish error.

The name of the group to which you are assigning the item in the underlying

The name of the group to which you are assigning the item in the underlying database. This becomes the item group object identifier (OID). Alphanumeric characters and underscores are allowed; spaces are not allowed. It is recommended that only lowercase letters, digits, and underscores are used in itemgroup names. The itemgroup name does not have to correspond to the begin/end group names defined in the type column. Begin group/repeat, end group/repeat, and note types should not have a value in the bind::oc:itemgroup cell. All items in a repeating group must have the same itemgroup name. That itemgroup name cannot be used by other items that are outside that repeating group. Once an itemgroup name is defined in this spreadsheet and the form is uploaded into OpenClinica, the itemgroup name should not be changed to GROUP1 or Group1 when the form is uploaded again. For example, if group1 is part of the first form upload, this should not be changed to GROUP1 or Group1 when the form is subsequently uploaded. Any change from/to upper/lower case in an itemgroup name will result in a form or publish error.

The data type of the item (e.g. select one, select multiple, etc.)

The data type of the item (e.g. select one, select multiple, etc.)

 - Single-select: Allows the user to select one response from a list defined
in the Form. On the survey sheet, enter select one xxxxx in
the type column. On the choices sheet, enter the same xxxxx in the list_name column for each choice and define options in the label and name columns

- Single-select (external list): Allows the user to select one response from a list defined in a CSV file. On the survey sheet, enter select_one_from_file xxxxx.csv in the type column. This is ideal for

Multi-select: Allows the user to select one or more responses from a list
defined in the Form. On the survey sheet, type select_multiple xxxxx in
the type column. On the choices sheet, enter the same xxxxx in
the list_name column for each choice and define options in
the label and name columns.

- Text: Allows the user to enter a text value. On the survey sheet, enter text in the type column. Text is up to 3,999 characters

- Integer: Allows the user to enter an integer value. On the survey sheet, enter integer in the type column.

- Decimal: Allows the user to enter a decimal value. On the survey sheet, enter **decimal** in the **type** column.

Calculate: Calculates a value and does not display it to the user by default. On the survey sheet, enter calculate in the type column. Use a type of note to display the answer.

Date: Allows the user to enter a date value. On the survey sheet, enter date in the type column.

Note:Displays a message to the user without collecting a value. On the survey sheet, enter note in the type column.

File: Allows the user to attach a file. On the survey sheet, enter file in

the **type** column.

- **Image:** Allows the user to attach a .png or .gif file. On the **survey** sheet,

enter image in the type column - Audio: Allows the user to attach an audio file. On the survey sheet,

- ${\bf Video}:$ Allows the user to attach a video file. On the ${\bf survey}$ sheet, enter ${\bf video}$ in the ${\bf type}$ column.

Layout Group (non-repeating): Allows users to group items together
to alter the layout of the Form. On the survey sheet, enter begin group in
the type column to indicate the beginning of a group of items and enter end
group in the type column to indicate the end of the group of items.

- Layout Group (repeating): Allows user to group items together to alter the layout of the Form and allow the user to enter values for the items the tayout of the rorm and allow the user to either values for the thems multiple times, if necessary. On the **survey** sheet, enter **begin repeat** in the **type** column to indicate the beginning of a repeated group of items and enter **end repeat** in the **type** column to indicate the end of a repeated group

A short description of the item that can be used to reference it in tables. This description can be up to 40 characters. You cannot use special characters. If this is not defined for an item in a table, the Item Name appears instead.

A long description of the item that can be used to define the data that the Along description of the feel made daily be able to define the data that be tended that the te

Item Brief Description

This determines how each item appears based on its Type. Items do not have a specific appearance by default. This setting is optional. **Note:** the type, **other** indicates that instead of selecting the option, other, you can This determines how each item appears based on its Type. Items do not have a specific appearance by default. This setting is optional. Note: the type, other indicates that instead of selecting the option, other, you can enter the appearance directly in the field, other also appears as an option for the item types indicated. You can specify width for any item. (See Width) Single select / Multienter the appearance directly in the field. other also appears as an option the item types indicated. You can specify width for any item. (See **Width**) Single select / Multi-select default: Allows the user to select one or multiple responses default: Allows the user to select one or multiple responses minimal: Displays answer choices in a drop-down menu rather than the default display of radio buttons (for select_one and select_multiple) or check boxes (for select_multiple) - minimal: Displays answer choices in a drop-down menu rather than the default display of radio buttons (for select_one and select_multiple) or check boxes (for select_multiple) - **columns** or **columns no-buttons**: Arranges answer choices horizontally in columns based on screen size (Displays radio buttons or check boxes unless you specify no-buttons, which displays text or images.) columns or columns no-buttons: Arranges answer choices horizontally in columns based on screen size (Displays radio buttons or check boxes unless you specify no-buttons, which displays text or images.) - columns-pack or columns-pack no-buttons: Arranges image answer - **columns-pack** or **columns-pack no-buttons:** Arranges image answer choices side-by-side, close together (Displays radio buttons or check boxes unless you specify no-buttons, which displays choices side-by-side, close together (Displays radio buttons or check boxes unless you specify no-buttons, which displays text or images.) text or images.) columns-n or no-buttons: Arranges image answer choices in column - columns-n or no-buttons: Arranges image answer choices in column Format with n columns (n <= 10) (Displays radio buttons or check boxes unless you specify no-buttons, which displays text or Format with n columns (n <= 10) (Displays radio buttons or check boxes unless you specify no-buttons, which displays text or images.) images. - **likert**: Displays answer choices as a Likert scale (This is not available for select_multiple items.) - likert: Displays answer choices as a Likert scale (This is not available for select multiple items.) image-map: Displays an image (must be uploaded with the Form); allows user to select by clicking part of the image (e.g., a select multiple specific parts on a body map). Only files with an extension of .svg are permitted, and the file name must be listed in the image column for the item - image-map: Displays an image (must be uploaded with the Form); allows user to select by clicking part of the image (e.g., a select multiple specific parts on a body map). Only files with an extension of .svg are permitted, and the file name must be listed in the image column for the item - autocomplete: Displays options that match the information you enter as you type autocomplete: Displays options that match the information you enter as other: Select other and enter another appearance or define the column width. text other: Select other and enter another appearance or define the column - default: Allows the user to enter a single line of text. width text - multiline: Allows the user to enter text in a text box multiple lines long (word wrap). - default: Allows the user to enter a single line of text. other: Select other and enter another appearance or define the column width. - multiline: Allows the user to enter text in a text box multiple lines long default: Allows the user to enter a whole number other: Select other and enter another appearance or define the column other: Enter another appearance or define the column width width. integer - analog scale: Allows the user to input an integer using a Visual Analogue Scale. Select the appropriate option for how you want to display the scale: analog horizontal, analog horizont no-ticks, analog vertical, analog vertical, analog vertical, analog vertical no-ticks, and analog-scale vertical show-scale. scale is always 0-100. In Form Designer, type this into the Appearance field. default: Allows the user to enter a whole number. w-scale. The - other: Enter another appearance or define the column width. decimal analog scale: Allows the user to input an integer using a Visual default: Allows the user to enter a decimal number. Analogue Scale. Select the appropriate option for how you want to display the scale: analog horizontal, analog horizontal no-ticks, analog other: Enter another appearance or define the column width vertical, analog vertical no-ticks and analog-scale vertical show-scale The scale is always 0-100. In Form Designer, type this into calculate the **Appearance** field. **decimal** default: This occurs internally, so it does not have an appearance. You can use the note type to display the result Date - default: Allows the user to enter a decimal number - other: Enter another appearance or define the column width.

calculate default: Allows the user to enter a full date: day, month, and year. - month-year: Allows the user to enter a partial date: month and year only. default: This occurs internally, so it does not have an appearance. You am use the note type to display the result. - year: Allows the user to enter a partial date: year only. Date other: Select other and enter another appearance or define the column width. note - default: Allows the user to enter a full date: day, month, and year. - default: Displays a note - month-year: Allows the user to enter a partial date: month and year only - other: Enter another appearance or define the column width file - year: Allows the user to enter a partial date: year only - **default:** Allows the user to upload a file.
- **other:** Enter another appearance or define the column width. other: Select other and enter another appearance or define the column width image default: Allows the user to upload an image. A preview appears - default: Displays a note. - ${\bf other:}$ Enter another appearance or define the column width. - draw: Allows the user to draw a picture on the screen, using the mouse or a touch screen annotate: Allows the user to upload an image and then draw on it, using the mouse or a touch screer - **default:** Allows the user to upload a file. **other:** Enter another appearance or define the column width. - signature: Allows the user to draw a signature on the screen using the mouse or a touch screen.
 This is not a 21 CFR Part 11-compliant signature. - default: Allows the user to upload an image. A preview appears other: Select other and enter another appearance or define the column width - draw: Allows the user to draw a picture on the screen, using the mouse default: Allows the user to upload an audio file. A preview appears annotate: Allows the user to upload an image and then draw on it, using other: Enter another appearance or define the column width - signature: Allows the user to draw a signature on the screen using the mouse or a touch screen. This is not a 21 CFR Part 11-compliant signature. ult: Allows the user to upload a video file. A preview appears. other: Enter another appearance or define the column width. other: Select other and enter another appearance or define the column Layout groups - default: Allows the user to group items without altering how they are displayed default: Allows the user to upload an audio file. A preview appears. field-list: Displays an entire group of guestions together on one page. In Form Designer, check the box next to the Show all questions in this group on the same screen other: Enter another appearance or define the column width video - table-list: Displays a common list of labels as a top row, and then each field in the group displays columns of radio buttons or check boxes.

Note: Items with no label or hint are treated as background calculations. This means you can set the data type of a background calculation item as needed. For example, you can have an integer type item with a calculation but no label or hint. It does not appear on the form and performs a - default: Allows the user to upload a video file. A preview appears - other: Enter another appearance or define the column width. Layout groups default: Allows the user to group items without altering how they are - field-list: Displays an entire group of questions together on one page. In Form Designer, check the box next to the Show all questions in this group on the same screen.

- table-list: Displays a common list of labels as a top row, and then each field in the group displays columns of radio buttons or check boxes.

Note: Items with no label or hint are treated as background calculations. This means you can set the data type of a background calculation item as needed. For example, you can have an integer type item with a calculation but no label or hint. It does not appear on the form and performs a

background calculation.

background calculation.

For an item or group of items on a grid form, you can control how many columns appear on each row by specifying the width \mathbf{w} . If you specified a width of \mathbf{w} 6 for a layout group, it takes up the entire width of the grid. If you specified w1 for a single item in the group, there would be one small column

Width

Required



(1) and another large column (5) This specifies whether a user is required to enter a response to the item to proceed with data entry. Select Always, Never, or Conditional to specify whether/when a response to this item/question is required. If you select Conditional, you must enter a conditional value.

This item is a value used for logic or calculations, clinicaldata is used for cross-Form, cross-event. This near is a value uses no rogic of candidatolus turneadous is used not ross-roun, couse-ten, or event level calculations, contactdata displays contact data on a form. If you enter contactdata, you must add a column called instance::oc:contactdata. That column must contain one of the following values to indicate which contact information it is

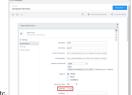
collecting: firstname, lastname, email, mobilenumber, secondaryid.

Use External Value



This specifies that you cannot enter data for an item. This can be used for

Read Only



the types of text, calculations, etc. An expression used to calculate a value, usually using the values of preceding questions on the current Form. This can also be used for Cross-form calculations. . is used to represent the current field's value. **s [name]** is used to reference a different item value on this Form, where name is the name of the other item. You can use parentheses. The following operators can be used:

- Addition: + - Subtraction: -- Multiplication: * - Division div - Not Equal: !=

- Less than or equal to: <=

- Less than: <

- Greater than: >

Calculation

- Greater than or equal to: >=>/li> And: and Or۰

OF:

or For example, to calculate Mean Arterial blood Pressure (MAP) based on the items systolic and diastolic: (systolic + (2*diastolic)) div 3 Calculations cannot be used for items with type of note. If calculation is used for any type except calculate, that field must have Read Only set to yes.



The question text to be displayed on the data entry form. This field allows alphanumeric characters. Add a line break where you want using Ctrl-Enter or Ctrl-AllEnter (Windows) Option+Enter (Mac). Styling prompts can be added to format your text as follows: *text* displays as taltics **text** displays as bold ***text*** displays as bold italics Increase font size by preceding the text with one to six hash tags. # makes the text the largest possible size. # # makes the text the smallest possible size. Sizes that display may vary for note vs. item vs. group labels. Colors can be added as follows: text for red text. You can use the hex code for the color of your choice. (You can look un bex codes by searching for css codes on the internet.) the color of your choice. (You can look up hex codes by searching for css codes on the internet.)

For an item or group of items on a grid form, you can control how many columns appear on each row by specifying the width \mathbf{w} . If you specified a width of \mathbf{w} 6 for a layout group, it takes up the entire width of the grid. If you specified \mathbf{w} 1 for a single item in the group, there would be one small column (1) and another large column (5).

This specifies whether a user is required to enter a response to the item to proceed with data entry. For required fields, type yes in the required column on the survey sheet. For conditionally required fields, enter a condition, as defined in the relevant column of the survey sheet. For example, if Number of packs per day is required if Does the subject smoke? is answered yes, enter. \${smoke}? is noter. This column supports the syntax as defined in the calculation, constraint, or relevant columns of this worksheet. Refer to those column comments for additional examples this worksheet. Refer to those column comments for additional examples.



This item is a value used for logic or calculations. clinicaldata is used for cross-Form, cross-event, or event level calculations. contactdata displays contact data on a form. If you enter contactdata, you must add a column called instance::oc:contactdata. That column must contain one of the following values to indicate which contact information it is collecting: firstname, lastname, email, mobilenumber, secondaryid.

This specifies that you cannot enter data for an item. This can be used for



An expression used to calculate a value, usually using the values of preceding questions on the current Form. This can also be used for Crossform calculations. . is used to represent the current field's value. \$\((\mathbf{s} \text{mm}) \) is used to reference a different item value on this Form, where name is the name of the other item. You can use parentheses. The following operators can be used:

Multiplication: * Division: div - Equal: = - Not Equal: != - Less than: < - Less than or equal to: <= - Greater than or equal to: >=>/li> And: and

Or: Or For example, to calculate Mean Arterial blood Pressure (MAP) based on the items systolic and diastolic: (systolic + (2*diastolic)) div 3 Calculations cannot be used for items with type of note. If calculation is used for any type except calculate, that field must have Read Only set

The question text to be displayed on the data entry form. This field allows alphanumeric characters. Add a line break where you want using Ctrl-Enter or Ctrl-Atl-Enter (Windows) Option+Enter (Mac). Styling prompts can be added to format your text as follows: "text* displays as italics **text** displays as bold **text** displays as bold italics Increase font size by preceding the text with one to six hash tags. # makes the text the largest possible size. ## makes the text the smallest possible size. Sizes that display may vary for note vs. item vs. group labels. Colors can be added as follows: text for red text. You can use the hex code for the color of your choice. (You can look up hex rodes by searching for css codes on the internet.) can look up hex codes by searching for css codes on the internet.)



The unique code value stored in the database that corresponds to each answer choice (e.g. **1=Yes**). These codes are generated automatically but can be changed.

Value/Name



The unique internal name of the layout group used in the database. This is not displayed during data entry. Alphanumeric characters and underscores are allowed.

Item Name/Name



Click this check box to make all items appear on the same screen (regardless of your layout

Show All Questions in this Group on the Same Screen/Appearance



This specifies that the group of items should be repeated. Click this check box to make the selected

Repeat this group if Necessary



This is a condition under which an item is skipped. Enter a condition under which this item/question

Skip Logic / Relevant



This is a condition under which an a response is considered invalid. Validation Criteria prevents users from entering invalid data. (e.g. "a Participant's pulse must be >=60 and <=100.") **Note:** You can also manually add skip logic or validation logic in XLS Form Code.

Validation Criteria / Constraint

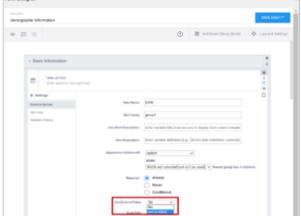


A message stating that data is invalid and/or explaining why it is invalid (e.g. "Pulse is outside normal range.") If you provide a constraint, you can include a message that explains why the answe provided is not acceptable. The message displays if the constraint expression is FALSE. For example, If you had the following constraint on the Pulse item: >>= 60 and .<=100 and a constraint, message of: Pulse is outside of the normal range. If someone entered a Pulse of 40, Pulse is outside of the normal range. would display on the form.

Constraint Message



Displays contact data on Form. In the Use as External Value field, select contactdata. Save your draft and exit. Then re-enter Form Designer, and select the types of contact data you want to display.



The unique code value stored in the database that corresponds to each

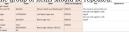


The unique internal name of the layout group used in the database. This is not displayed during data entry. Alphanumeric characters and underscores



N/A

This uses **begin repeat** and **end repeat** in the **Type** column to specify that the group of items should be repeated.



This is a condition under which an item is skipped (as defined in the relevant column). The item or group is only displayed if the provided expression evaluates to TRUE. Use the following syntax: \${other question name} = value (for a numeric value) or \${other question same} = value (for a character value) if the lead-in question uses a code list defined in the choices worksheet, use what is in the name column for that code list as the value. For example, if you have two questions: Does the subject smoke? (Item name = smoke) and How many packs per day? (Item name=packs), the second question should only display if the answer to the first question is Yes. If the first question (smoke) uses a code list defined in the choices worksheet as: list name label name YN 1 Yes YN 2 No The relevant syntax for How many packs per day would be: \${smoke} = 1 For multi select items, use the following syntax: selected(\${question name}, value) (for a numeric value) selected(\${question name}, value) (for a character string) Note: This column supports the syntax as defined in the required, calculations, or relevant columns.

This is a condition under which an a response is considered invalid (as defined in the constraint column). Validation Criteria determines whether data is valid. This allows for edit checks, which you can define as soft checks or hard checks. If the expression provided in this cell is FALSE, the constraint message displays. For example, if this tiem value must be between 10 and 60, enter the following (in expressions, . (dot) represents the current item value). >= 10 and . <= 60 To reference other item values, use the following syntax: $\$(tem.name\}$ operator value Use and/or logic as needed. For example: \$(sysbp) >= 130 and . >= 10 and . <= 60 To reference other item values, use the following syntax: $\$(tem.name\}$ operator value. Use and/or logic as needed. For example: \$(sysbp) >= 130 and . >= 10 and . <= 60 To reference other item values, use the following syntax: $\$(tem.name\}$ operator value Use and/or logic as needed. For example: \$(sysbp) >= 130 and . >= 10 and . <= 60 To reference other item values, use the following syntax: \$(tem.name) operator value Use and/or logic as needed. For example: \$(sysbp) >= 130 and . >= 10 and . <= 60 To reference other item values, use the following syntax: \$(tem.name) operator value Use and/or logic as needed. For example: \$(sysbp) >= 130 and . >= 10 and . <= 60 To reference other item values, use the following syntax: \$(tem.name) operator values use the following syntax: \$(tem.name) operator values use the following syntax: \$(tem.name) operator values used to refer the following syntax: \$(tem.name) operator values and \$(tem.name) operator values.

A message stating that data is invalid and/or explaining why it is invalid (e.g. "Pulse is outside normal range.") If you provide a constraint, you can include a message that explains why the answer provided is not acceptable. The message displays if the constraint expression is FALSE. For example, If you had the following constraint on the Pulse item: .>= 60 and .<=100 and a constraint message of: Pulse is outside of the normal range. If someone entered a Pulse of 40, Pulse is outside of the normal range.

bind::oc:contactdata Displays contact data on Form.

Contact Data

Form Title

The form title appears at the top of the data entry page. **BOTH Form Designer and Form Template** - You can use alphanumeric characters, special characters (e.g. & # \$ ^ _), and spaces.

Form ID

A unique identifier used as an internal reference when the form is uploaded. This value is not visible to end-users. **BOTH Form Designer and Form Template** - Alphanumeric characters and underscores are permitted; no spaces. **Form Version** A unique identifier for an iteration of a given form (including changes to items, form logic, etc.).

Functional approval by Kate Lambert. Signed on 2025-02-07 3:11PM

Approved for publication by Paul Bowen. Signed on 2025-02-10 12:40PM

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