



PDF Action Tags - REDCap User Guide

Note: there is a \$100 one-time fee to activate this module in each REDCap project.

Introduction:

A REDCap External Module that provides action tags for controlling PDF output. The action tags allow you to suppress data in text fields, the enumerations in radio and checkbox fields, hide field notes and add whitespace to a field label to push down the next field on the PDF page.

Note: some action tags will only affect rendering of *blank* PDFs and will not work when data is present!

Limitations:

Using this module **is not a safe way to protect sensible data.**

Access PDF Action Tags

Activation:

- 1) Submit the *REDCap External Modules – Request for Activation* survey:
<https://redcap.ctsi.ufl.edu/redcap/surveys/?s=NMX88YLC9>
- 2) Once activated by the REDCap Team (you'll be notified via email), go to the *External Modules* page to configure the module:

In the Online Designer, you can now access the PDF Action Tags in a field box.

Field Type: Text Box (Short Text, Number, Date/Time, ...)

Question Number (optional)
Displayed only on the survey page

Field Label
First Name

Action Tags / Field Annotation (optional)

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

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

How to use [Smart Variables](#) [Piping](#)

Validation? (optional) ---- None ----

– or –
-- select ontology service --

Required?* No Yes
* Prompt if field is blank

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

PDF Action Tags

Action tags provided by the PDF @ActionTags External Module:		
Add	@PDF-HIDDEN @HIDDEN-PDF	<p>When present, the field will not be shown on the PDF. A parameter can be supplied: <code>@PDF-HIDDEN="all blank data"</code>. By default, the parameter <code>all</code> is assumed (or when a parameter other than <code>blank</code> or <code>data</code> is given). When <code>blank</code> is specified, the field will be hidden on blank PDFs only. In case of <code>data</code>, the field will only be hidden on PDFs with data.</p> <p><code>@HIDDEN-PDF</code> can be used synonymously.</p> <p style="text-align: center;"> Add 'blank' Add 'data' </p>
Add	@PDF-NOENUM	<p>When present in a field (sql, select, radio), the enumeration of the list members will be suppressed. Instead, the field is shown as if it was a text field, i.e. it will be represented with an empty line. When a data value is present, the value will be preserved.</p> <p>A parameter can be supplied: <code>@PDF-NOENUM="all blank data"</code>. This will limit the scope of this action tag to blank PDFs or PDFs with data only. All values other than <code>blank</code> and <code>data</code> are treated equivalent to <code>all</code>.</p> <p style="text-align: center;"> Add 'blank' Add 'data' </p>
Add	@PDF-FIELDNOTE-BLANK	<p>Use with a parameter: <code>@PDF-FIELDNOTE-BLANK="text"</code>. When present, the field note will be replaced by <code>text</code> on blank PDFs only.</p>
Add	@PDF-FIELDNOTE-DATA	<p>Use with a parameter: <code>@PDF-FIELDNOTE-DATA="text"</code>. When present, the field note will be replaced by <code>text</code> on PDFs with saved data only.</p>
Add	@PDF-WHITESPACE	<p>Always use with a parameter: <code>@PDF-WHITESPACE="number of lines"</code>. If present, it will add the given number of empty lines to a field's label, pushing down the next field on the page. 'number of lines' must be a positive integer. This action tag only applies blank PDFs.</p>

@PDF-HIDDEN / @HIDDEN-PDF: = "all | blank | data"

When present, the field will not be shown on the PDF. By default, the parameter `all` is assumed (or when a parameter other than `blank` or `data` is given). When `blank` is specified, the field will be hidden on blank PDFs only. In case of `data`, the field will only be hidden on PDFs with data.

Without data:

When present, the field will not be shown on the PDF. A parameter can be supplied: `@PDF-HIDDEN="all|blank|data"`. By default, the parameter `all` is assumed (or when a parameter other than `blank` or `data` is given). When `blank` is specified, the field will be hidden on blank PDFs only. In case of `data`, the field will only be hidden on PDFs with data. `@HIDDEN-PDF` can be used synonymously.

Add `@PDF-HIDDEN`
Add `@HIDDEN-PDF`


Add 'blank' **Add 'data'**

Field Label
 E-mail address

Action Tags / Field Annotation (optional)
`@PDF-HIDDEN="blank"`

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

Here is the blank Data Entry Form with the Email Address field.

Event Name: Initial Data (Arm 1: Arm 1)	
Participant ID	16
Please fill out the information below.	
Date of birth	<input type="text"/>  Today Y-M-D
E-mail address	<input type="text"/>
I currently have Type 2 Diabetes	<input type="radio"/> True <input type="radio"/> False
By checking this box, I certify that I am at least 18 years old and that I give my consent freely to participate in this study.	<input type="radio"/> I consent

Here is the PDF of the same Data Entry Form and the Email Address field is missing.

Please fill out the information below.	
1) Date of birth	_____
2) I currently have Type 2 Diabetes	<input type="radio"/> True <input type="radio"/> False
3) By checking this box, I certify that I am at least 18 years old and that I give my consent freely to participate in this study.	<input type="radio"/> I consent

With Data:

Add @PDF-HIDDEN

Add @HIDDEN-PDF

When present, the field will not be shown on the PDF. A parameter can be supplied: `@PDF-HIDDEN="all|blank|data"`. By default, the parameter `all` is assumed (or when a parameter other than `blank` or `data` is given). When `blank` is specified, the field will be hidden on blank PDFs only. In case of `data`, the field will only be hidden on PDFs with data. `@HIDDEN-PDF` can be used synonymously.

Add 'blank' **Add 'data'**

Field Label

E-mail address

Action Tags / Field Annotation (optional)

`@PDF-HIDDEN="data"`

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

Here is the Data Entry Form (has data saved) with the Email Address field.

Participant ID	1
Please fill out the information below.	
Date of birth	<input type="text" value="1990-01-01"/>
E-mail address	<input type="text" value="j.johnston@ufl.edu"/>
I currently have Type 2 Diabetes	<input checked="" type="radio"/> True <input type="radio"/> False
By checking this box, I certify that I am at least 18 years old and that I give my consent freely to participate in this study.	<input checked="" type="radio"/> I consent

Here is the PDF of the same Data Entry Form and the Email Address field is missing.

Please fill out the information below.	
1) Date of birth	1990-01-01
2) I currently have Type 2 Diabetes	<input checked="" type="radio"/> True <input type="radio"/> False
3) By checking this box, I certify that I am at least 18 years old and that I give my consent freely to participate in this study.	<input checked="" type="radio"/> I consent

@PDF-NOENUM: = "all | blank | data"

When present in a field (sql, select, radio), the enumeration of the list members will be suppressed. Instead, the field is shown as if it was a text field, i.e. it will be represented with an empty line. When a data value is present, the value will be preserved.

A parameter can be supplied: @PDF-NOENUM="all|blank|data". This will limit the scope of this action tag to blank PDFs or PDFs with data only. All values other than *blank* and *data* are treated equivalent to *all*.

Without data:

When present in a field (sql, select, radio), the enumeration of the list members will be suppressed. Instead, the field is shown as if it was a text field, i.e. it will be represented with an empty line. When a data value is present, the value will be preserved.

A parameter can be supplied: `@PDF-NOENUM="all|blank|data"`. This will limit the scope of this action tag to blank PDFs or PDFs with data only. All values other than `blank` and `data` are treated equivalent to `all`.

Add `@PDF-NOENUM`

Add 'blank' **Add 'data'**

Field Label
Reason patient withdrew from study

Choices (one choice per line) [Copy existing choices](#)

0, Non-compliance
1, Did not wish to continue in study
2, Could not tolerate the supplement
3, Hospitalization

[How do I manually code the choices?](#)

Action Tags / Field Annotation (optional)

`@PDF-NOENUM="blank"`

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

Here is the blank Data Entry Form with Radio Button field.

Reason patient withdrew from study

Non-compliance
 Did not wish to continue in study
 Could not tolerate the supplement
 Hospitalization
 Other

[reset](#)

Here is the PDF of the same Data Entry Form and the Radio Button field has a blank line.

Put a date if patient withdrew study _____

Reason patient withdrew from study _____

With Data:

Add @PDF-NOENUM

When present in a field (sql, select, radio), the enumeration of the list members will be suppressed. Instead, the field is shown as if it was a text field, i.e. it will be represented with an empty line. When a data value is present, the value will be preserved.

A parameter can be supplied: @PDF-NOENUM="all|blank|data". This will limit the scope of this action tag to blank PDFs or PDFs with data only. All values other than blank and data are treated equivalent to all.

Add 'blank' **Add 'data'**

Field Label
Reason patient withdrew from study

Choices (one choice per line) [Copy existing choices](#)

0, Non-compliance
1, Did not wish to continue in study
2, Could not tolerate the supplement
3, Hospitalization

[How do I manually code the choices?](#)

Action Tags / Field Annotation (optional)
@PDF-NOENUM="data"

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

Here is the Data Entry Form with saved data in the Radio Button field.

Reason patient withdrew from study

Non-compliance
 Did not wish to continue in study
 Could not tolerate the supplement
 Hospitalization
 Other

[reset](#)

Here is the PDF of the same Data Entry Form and the Radio Button field has the value preserved.

Put a date if patient withdrew study	2019-06-10
Reason patient withdrew from study	Did not wish to continue in study

@PDF-FIELDNOTE-BLANK: = "text"

When present, the field note will be replaced by *'text'* on blank PDFs only.

Without data:

Add **@PDF-FIELDNOTE-BLANK** Use with a parameter: `@PDF-FIELDNOTE-BLANK="text"`. When present, the field note will be replaced by *text* on blank PDFs only.

Field Label

Weight

Action Tags / Field Annotation (optional)

@PDF-FIELDNOTE-BLANK="text"

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

Here is the blank Data Entry Form with a Text field and field notation (kilograms).

Weight

kilograms

Here is the PDF of the same Data Entry Form and the Field Notation has been replaced with "text".

10) Weight

(text)

@PDF-FIELDNOTE-DATA: = "text"

When present, the field note will be replaced by *'text'* on PDFs with saved data only.

With data:

Add **@PDF-FIELDNOTE-DATA** Use with a parameter: `@PDF-FIELDNOTE-DATA="text"`. When present, the field note will be replaced by *text* on PDFs with saved data only.

Field Label
Weight

Action Tags / Field Annotation (optional)
`@PDF-FIELDNOTE-DATA="text"`

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

Here is the Data Entry Form with saved data in the Text field and the Field Notation.

Weight kilograms

Here is the PDF of the same Data Entry Form and the Field Notation has been replaced with "text".

10) Weight 61
(text)

@PDF-WHITESPACE: = "number of lines"

When present, the given number of empty lines will be added to a field's label, pushing down the next field on the page. The number of lines must be a positive integer. **This action tag only affects blank PDFs!**

Add **@PDF-WHITESPACE** Always use with a parameter: `@PDF-WHITESPACE="number of lines"`. If present, it will add the given number of empty lines to a field's label, pushing down the next field on the page. 'number of lines' must be a positive integer. **This action tag only applies blank PDFs.**

Here is PDF of Data Entry Form *without* the @PDF-WHITESPACE Action Tag.

3) I currently have Type 2 Diabetes	<input type="radio"/> True <input type="radio"/> False
4) By checking this box, I certify that I am at least 18 years old and that I give my consent freely to participate in this study.	<input type="radio"/> I consent

Added @PDF-WHITESPACE Action Tag with '9'.

Field Label I currently have Type 2 Diabetes
Choices (not modifiable) 1, True 0, False
Action Tags / Field Annotation (optional) <input 9"="" type="text" value="@PDF-WHITESPACE="/> @PDF-WHITESPACE="9"
Learn about @ Action Tags or using Field Annotation

Here is PDF of Data Entry Form with the @PDF-WHITESPACE Action Tag with '9'.

3) I currently have Type 2 Diabetes

- True
 False

4) By checking this box, I certify that I am at least 18 years old and that I give my consent freely to participate in this study.

- I consent