

Branching Logic

Branching Logic helps to control the data entry workflow by hiding/showing certain fields under controlled conditions.

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.

- Select the **Branching Logic** icon on the field you wish to Show or Hide.

The screenshot displays a user interface for configuring branching logic. It consists of two main panels, each with a header bar containing 'Add Field' and 'Add Matrix of Fields' buttons. The top panel is for a 'Yes No Field' with the variable 'yes_no'. It features a toolbar with icons for edit, copy, paste, and delete, followed by a 'Variable: yes_no' label. Below this, there are two radio buttons labeled 'Yes' and 'No', and a 'reset' button in the bottom right corner. The bottom panel is for a 'Text Field' with the variable 'text_field'. It has a similar toolbar, but the 'Branching Logic' icon (a green square with a white 'X') is highlighted with a red box. Below the toolbar, there are two radio buttons labeled 'Yes' and 'No', and a 'reset' button in the bottom right corner. The entire interface is set against a light gray background.

- The **Branching Logic** design box will appear.

— OR —

Drag-N-Drop Logic Builder

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

record_id = (define criteria)
yes_no = Yes (1)
yes_no = No (0)
my_first_instrument_complete = Incomplete (0)
my_first_instrument_complete = Unverified (1)
my_first_instrument_complete = Complete (2)

→ **Drag and Drop** →

Show the field ONLY if...

☒ ALL below are true
☐ ANY below are true

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[Clear logic](#)

Save

Cancel

- In the Drag-N-Drop Logic Builder **drag** the choice that will trigger the Show/Hide logic. In this instance a text field will appear when **yes** has been selected in the question above. Click **Save**

— OR —

Drag-N-Drop Logic Builder

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

record_id = (define criteria)
yes_no = Yes (1)
yes_no = No (0)
my_first_instrument_complete = Incomplete (0)
my_first_instrument_complete = Unverified (1)
my_first_instrument_complete = Complete (2)

→ **Drag and Drop** →

Show the field ONLY if...

☒ ALL below are true
☐ ANY below are true

yes_no = Yes (1) ✗

[Clear logic](#)

Save

Cancel

- **Branching logic exists** will now appear on the fields that you have applied logic to.

Variable: text_field **[Branching logic exists]**

Text Field

☐ Yes
☐ No

[reset](#)

**Testing New Workflow**

The logic should be tested by clicking **add/edit records** and adding a new record and following the newly applied workflow.