Creating Cascading Drop-Down Lists in an Epi Info™ 7 form

Cascading Drop-Down fields are essentially two or more Codes, Legal Value, or Comment Legal fields linked together in such a way as to filter each subsequent field based on the value selected in prior fields. In the example described below, the drop-down field for State, filters the drop-down field, County, to show only those counties that exist in the selected State. When County is selected, the drop-down field for Hospital is shown with only the hospitals located in the selected county.

In order to create Cascading Drop-Down fields, you need to have a table populated with all values for the linked fields that can be imported into Epi Info™ 7. The Excel spreadsheet shown below, named 'codeHospital' is an example of such a table. When importing this table into your Epi Info™ 7 project, the table name must contain the prefix "code" (i.e. **codeHospital**).

State	County	Hospital
Florida	Alachua	Alachua-Hospital 1
Florida	Alachua	Alachua-Hospital 2
Florida	Baker	Baker-Hospital 1
Florida	Escambia	Escambia-Hospital 1
Florida	Miami-Dade	Miami-Dade-Hospital 1
Florida	Miami-Dade	Miami-Dade-Hospital 2
Georgia	Appling	Appling-Hospital 1
Georgia	Appling	Appling-Hospital 2
Georgia	Appling	Appling-Hospital 3
Georgia	Calhoun	Calhoun-Hospital 1
Georgia	Calhoun	Calhoun-Hospital 2

Figure 1: Cascading Drop-down Fields

NOTE: To import a reference table into an Epi Info 7 project, please review the *HowToImportCodedTablesVersion2.pdf* document available at: http://www.phconnect.org/group/epiinfo/forum/topics/import-excel-or-access-table-into-form-designer

To set up a series of drop-down fields in your form as Cascading Drop-down fields, complete the following steps:

1. Add the first **Codes** field to the page. In this example, we named the field **State.** Don't select a field to be linked yet. You will do this later.

Figure 2: Adding Codes to create a Cascading Drop-down Field

2. Click **Ok**.

3. Add another **Codes** field to the page. In this example, we named the field **County**. Again, don't select a field to be linked yet. If you had more drop-down list fields to link, then you would repeat this step for all but the last field in your cascading sequence. In this example, however, we are only linking three fields, so the next field will be our last.

3. Click Ok.

4. Add the last **field** in our cascading sequence. In this example, we named the field **Hospital**. The last field should be a type other than a Codes field, such as Legal Value or Comment Legal. Since no other fields will be linked to this last field, you don't want to use a Codes field. So far in our example, we have created two Codes fields named 'State' and 'County', and have created one Legal Value field named 'Hospital'.

Figure 3: Adding Legal Values to Cascading Drop-down Fields

4. If using a Legal Value or Comment Legal field for the last field, click the browse button to the right of *Data Source*. The ***Set Up Code / Legal Links*** dialog opens.

5. Click **Use Existing**. The ***Open Form – Select a Table*** dialog box opens.

6. Select the code table that was imported and click **OK**. In this example, we selected the **codeHospital** table.

Figure 4: Open Form Dialog Box

7. Click **OK**. The Select a field dialog opens showing the columns in the **codeHospital** table that can be linked.

8. Select the appropriate **field**. Because we want to display a list of Hospitals with this drop-down list, we select **Hospital.**

Figure 5: Selecting a Field

9. Click **OK** on the **Select a Field** dialog.

10. Click **OK** on the **Set Up Code / Legal Links** dialog box.

11. Click **OK** on the Properties dialog.

The next steps are to link the field State with County.

12. Right click over the **State** field to see the *Properties* option. Our first field is 'State' and we want to link this field to the County field so when State is selected, only the corresponding counties are shown in the County field.

13. In the **Select Fields to be Linked** box, click on the field that you want to be filtered. Since, in our example, we want the County field to be filtered based on the selection made for State, we should select **County** here.

14. Click the **Browse** button to the right of **Data Source**. The Codes dialog opens.

15. Click **Use Existing**. The **Select a Table** dialog box opens.

16. Select the same code table used to link the last field. In our example, **codeHospital** is the code table we are using.

17. Click **OK**.

18. Click **Link**. The **Match Fields** dialog box opens. This is where we match the fields in our cascading sequence to the columns in the code table.

19. Select the **column to be linked** to the first **Codes** field. Since our first field is State, we selected **State**.

20. In the **Link Associated Fields** group, select the **Form Field to be linked**. For our example we want County to be linked to State, so we selected **County**.

21. In the **Table Fields** drop-down, select the corresponding column in the code table. In this case select **County**.

22. Click **Link**. The association to the linked field appears in the Linked Fields box.

Figure 6: Match Fields Dialog Box

23. Click **Ok**.

24. Click **Ok**.

25. Click **Ok**.

The next steps are to link the field County with Hospital.

26. Right click over the **County** field to see the *Properties* option. Our second field is 'County' and we want to link this field to the Hospital field so when County is selected, only the corresponding Hospitals are shown in the Hospital field.

27. In the **Select Fields to be Linked** box, click on the field that you want to be filtered. Since, in our example, we want the Hospital field to be filtered based on the selection made for County, we should select **Hospital** here.

28. Click the **Browse** button to the right of **Data Source**. The Codes dialog opens.

29. Click **Use Existing**. The **Select a Table** dialog box opens.

30. Select the same code table used to link the last field. In our example, **codeHospital** is the code table we are using.

31. Click **OK**.

32. Click **Link**. The **Match Fields** dialog box opens. This is where we match the fields in our cascading sequence to the columns in the code table.

33. Select the **column to be linked** to the second **Codes** field. Since our second field is County, we selected **County**.

34. In the **Link Associated Fields** group, select the **Form Field to be linked**. For our example we want Hospital to be linked to County, so we selected **Hospital**.

35. In the **Table Fields** drop-down, select the corresponding column in the code table. In this case select **Hospital**.

36. Click **Link**. The association to the linked field appears in the Linked Fields box.

Figure 6: Match Fields Dialog Box

37. Click **Ok**.

38. Click **Ok**.

39. Click **Ok**.

Repeat the steps 12 through 25 for each remaining Codes field in the cascading sequence that you might have on your form. For each, specify the next field in the cascading sequence and link it to the corresponding field in the code table.

This completes the process for creating a series of cascading drop-down fields in an Epi Info 7 form. When the form is opened in the Enter Data module, the selection made in the first field in the cascading sequence will filter the values shown in the next field in the sequence.

Resource: This video will provide users with information on how to create cascading drop-down lists in the Form Designer.

https://www.youtube.com/watch?v=W1IJ27kx_yA&list=PL9B9157E47AB3FDFA&index=27