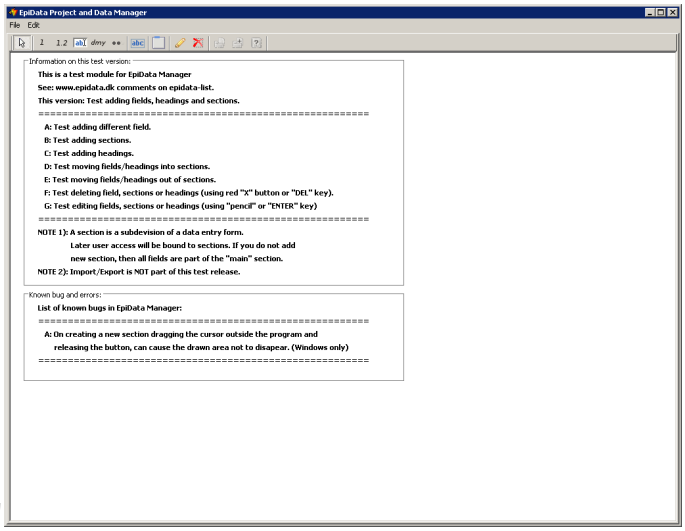
Short Introduction to EpiData manager (test versions)

v1.03

J.Lauritsen & T. Christiansen

The **EpiData Project and Data Manager** - in short **EpiData Manager** - is used for defining new data structures, modifying existing data structures (without loss of data) and documentation or export of data.



The Manager will gradually replace the existing **EpiData Entry** software as development continues.

The application will - in the test versions - automatically start with a standard data form containing introduction notes contained in two "sections". The first indicates what to test and the second known major errors. After you have read the comments delete the two sections by pointing at the title of each section and then hit "del" button or use the "erase all" button.

Functionality will increase with the implementation of features in the software. Information on development will be given in the EpiData-list, which you can find on the front page of http://www.epidata.dk

Why change to EpiData Manager ?

Since release of first EpiData software in 1999 many aspects have changed. The main reasons for development of the new strategy are:

- New users are increasingly ”graphicly” oriented and focused on mouse usage.
  - not understanding the well known qes-chk-rec principle
- There is a need for multiplatform development (Linux, Mac, Windows, PDA …..)
- Use of unicode (UTF-8) to support non-latin charaters uniformly across multiple platforms.
- We wish to implement GCP (Good Clinical Practice) required for many medical data projects. This demands encryption and logging of editing at a very detailed level. I also demands control of user access to data.
- There should be a common ”engine” for all EpiData software, such that handling of data and metadata (labels etc.) are based on the same internal routines.
- When doing data entry it should not be immediately easy to change rules or structure for data entry personnel. Therefore a dedicated **EpiData EntryClient** will be developed – serving only data entry.

Help in EpiData Manager
Some features of the help menu will come later in development. The intention is to have a link to introduction notes (this file), a link to keyboard short cuts (on internet), and a local short introduction (pdf). Therefore save this introduction file in the same folder as your exe file for manager. Just see in a given test version how far we are with this development.

How will a project manager see the new strategy ?
The work process will be more clearly divided into what the manager does and what the data entry persons do.

The **EpiData Manager** is a tool for the project manager person:

- Defines data structures, adds metadata (labels and definitions), documents data and exports for analysis.
- Updates data with new fields, changed formats for fields (e.g. more decimals) and is used for control of data.
- There is a choice of using computers with either Linux, Mac or Windows depending on the choice of the person. Files created are independent of operating system.

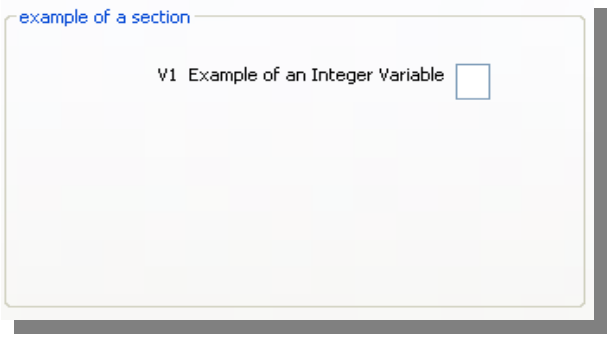
Basic ways of using the new software are explained on the next page. Please comment on functionality and possible discrepancies with your expectations on the EpiData List. (http://lists.umanitoba.ca/pipermail/epidata-list/)

How to create and modify data structures ?
When you start the program, a Data Form is shown with a pre-created sample section.

The toolbar contains buttons placed into logical groups of similar functionality.

The "arrow" is the default tool and is used to interact with the components placed on the data form. Next is the group with fields that allows for creating the supported types of fields (eg. Integer, Float, string, etc. - note this list differs slightly from previous versions of Manager and Entry). Next to the fields are two independant tools, the Heading tool which is used to create new headings (previously know as labels) and to the right is the new "Section" tool.

This gives three types of elements on a data form. Data entry fields of different types (integer, float, date, string etc.), text headings, which are just used for ”guidance” and section, for grouping common fields and heading into logical units.

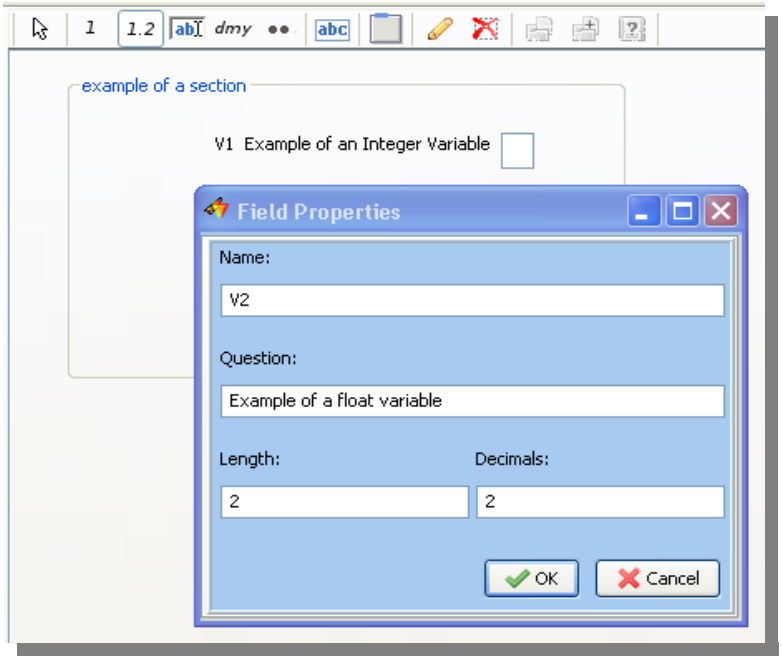


A field is where the user enters data. When all observations have been recorded the data can be read by analysis software, such as EpiData Analysis (future). Fields on the data form are then used as variables in the analysis. The sections will be the level for control of user access, e.g. some entry persons could have read only access to main data, and edit rights to a section with supplementary data.

How to create data forms in practice ?
Experiment with the following strategies when defining new data structutes:

Point and click:

1. Point on the toolbar for a given type of field and click - this indicates type of field.
2. Place the mouse curser on the dataform and click on the left button. The field open box will be shown, where you can indicate name, question and length.
3. Move the entry box around or change.



Quick addition of fields

Press F2, F3, F4, F5, F6, which will add fields and headings at the bottom of the current data form and give you the opportunity to add question, length and name for each.

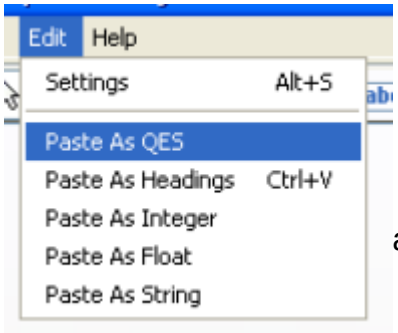
Right click on the "dmy" button to change default date type.

Even quicker is to use the Shift+F2 .... F5 keys to add fields without opening the field edit box.

Paste text and create data fields and headers
Open any editor or other software (text processor) etc. and create text lines. Mark these lines in a block and copy to the clipboard.

e.g. simple text:	**or as an old EpiData Entry qes file:**
Sex **age** **date of birth**	**sex #** **age ##** **date of birth <dd/mm/yyyy>**

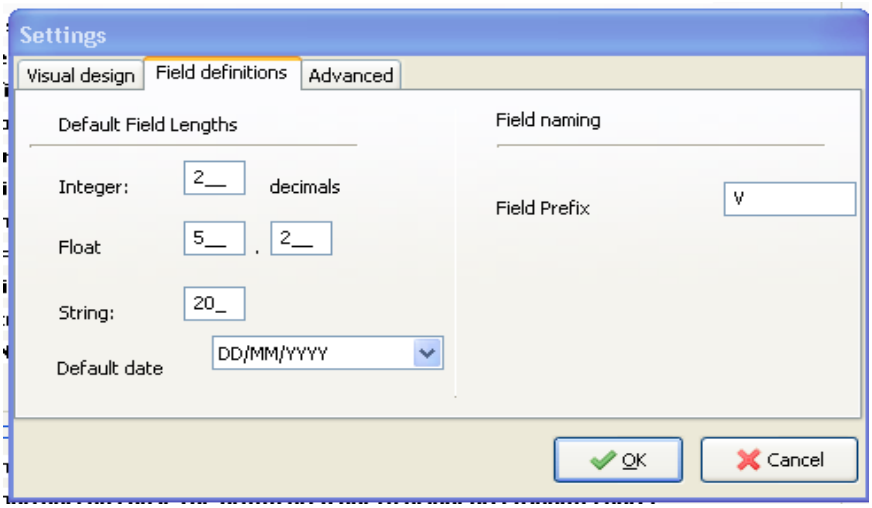
Then switch to the EpiData Manager and paste the text as fields or heading lines. For pasting the same type of field several times you might wish to change the default paste type in settings.



Default setting for paste by Ctrl+V is headings, but could be e.g. qes, which would format according to field specifications as in EpiData entry.

The fields are named Vx....Vx+n where the "V" is the prefix specified in settings and the x is the number of fields on the dataform. This style is what is known as "First Word" in EpiData Entry.

Default settings.



Also experiment with settings, which are shown with ”Alt+S” or in the "Edit" part of the main menu.

There are three aspects in this as shown on the ”Visual design” ”Field definitions” or ”Advanced” tab pages.

On the visual design tab snapping is defined. When this is "on", the software tries to autoalign components on the same x or y coordnate during a move (dragging a component around).

Keyboard Shortcuts.
From the help menu You can acces the wiki system - if you have an internet connection. The shortcuts are contained in the documentation wiki (under construction).

The idea of the short-cuts are to have some common keys among all EpiData Software and other which are special to each application (manager, entryclient, analysis).

Common Commands/Uses

Command	Linux	Mac [1)]	Windows
Settings	Alt+S	Alt+S	Alt+S
Help	F1	F1	F1
Quit/Exit	F12/Alt+F4	F12/Cmd+Q	F12/Alt+F4

EpiData Manager

Function Keys:

Shortcut	Command	OS*
F2	New Integer Field	L, M, W
F3	New Float Field	L, M, W
F4	New String Field	L, M, W
F5	New Date Field [2)]	L, M, W
F6	New Heading	L, M, W

Using the Shift key with the above keys auto creates the field using the default field length and default field prefix defined in settings (see above).

Other shortcuts:

Shortcut	Command	OS*
Enter	Edit selected field	L, W
Delete	Delete active field	L, M, W

* The list of OS's that this shortcut works with:

- L = Linux
- M = Mac OS X
- W = Windows

[1)] These are subject to change as it is our intent to follow the standard shortcuts of the OS's
[2)] Uses default date setting