

Short Introduction to EpiData manager

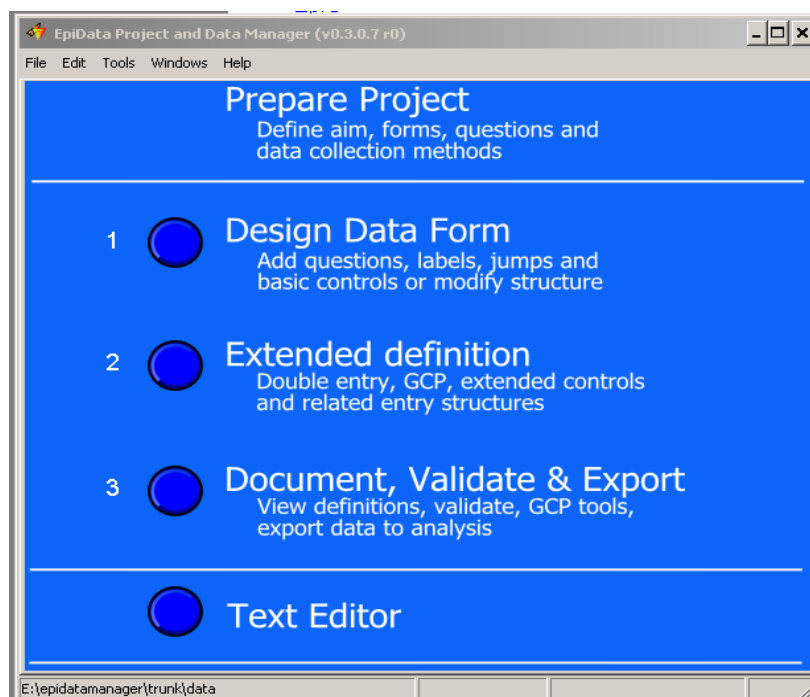
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The **EpiData Project and Data Manager** - in short **EpiData Manager** - is used for defining new data structures, modifying existing data structures (without loss of data) and documentation or export of data.

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

When starting the application You will see a blue front with white text and four buttons. By clicking on the buttons as indicated in the figure the different parts will be activated. An alternative is to use the menus.

The workflow is a graphical visualisation of a project. Preparing the project is not in the scope of the software, but obviously a necessary part of getting sound and valid data.



Most users will only need part 1 and 3 in the figure, whereas the "Text Editor" and the "Extended definition" is relevant for advanced users.

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 "graphically" 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
- Font management is changing to UTF-8 to avoid nationalisation problems
- 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.
- 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

See help menu. This will include a link to keyboard short cuts (on internet), and a local short introduction (pdf) (save this file where your exe file for manager is)

How will a project manager see the new strategy ?

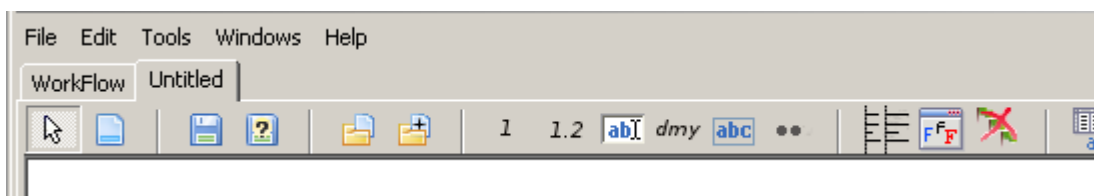
The work process is more clearly divided into what the manager does and what the data entry persons do. The **EpiData Manager** is a tool for the project person, which:

- 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 select "Design Data Form" on the Workflow screen an empty Data



Form "Untitled" is shown. The toolbar contains buttons for adding a file or the structure from a file, a group of buttons for single fields as seen at "Add Integer" and to the right of this a group of buttons allowing for aligning, erasing or showing the structure of a data form.

When you save the form a file will be created in the format called "RecXml", which contains 1:Visual design 2:Any data already contained 3:Controls during entry.

There are two types of elements on a data form. Data entry fields of different types (integer, float, date, string etc.) and text headings, which are just used for "guidance".

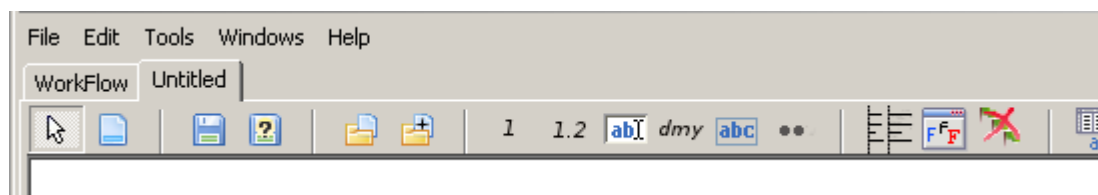
Example of a label text

Example of an integer variable



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. Fields on the data form are then used as variables in the analysis.

How to create data forms in practice ?



Experiment with the following strategies when defining new data structures:

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 cursor on the dataform and click on the left button. The field open box will be shown, where you can indicate field name, field label and length.
3. Move the entry box around or change.

Quick addition of fields

Press F2, F3, F4, F5, F6, which will add fields at the bottom of current data form and give you the opportunity to add labels, length and variable 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.

The screenshot shows a software interface with a toolbar at the top containing icons for file operations, field types (1, 1.2, ab, dmy, abc), and editing. Below the toolbar, the main area is titled 'Example of a label text' and contains two variables: 'V1 Example of an integer variable' and 'V2 Date variables'. A 'Field edit box' dialog is open, showing fields for 'Field Name' (V3), 'Variable label', 'Length' (5), 'Decimals' (2), and 'Type: Float'. The dialog has 'Ok' and 'Cancel' buttons.

Editor usage - QES principle

1. Open the editor from the workflow or menu.
2. To work with QES structure, write such a structure in the editor.
e.g. This is my question ##
Happened on <dd/mm/yyyy>
3. Mark the text as block
4. Press F8 - and you will see the fields on the data form.
5. Experiment also with the other "paste special" options shown in the main menu.
6. Notice that currently you cannot paste more than one field pr line. This might be changed later. With several fields pr line, these will be placed on separate lines each having one field. After pasting you can move the fields around on the form.

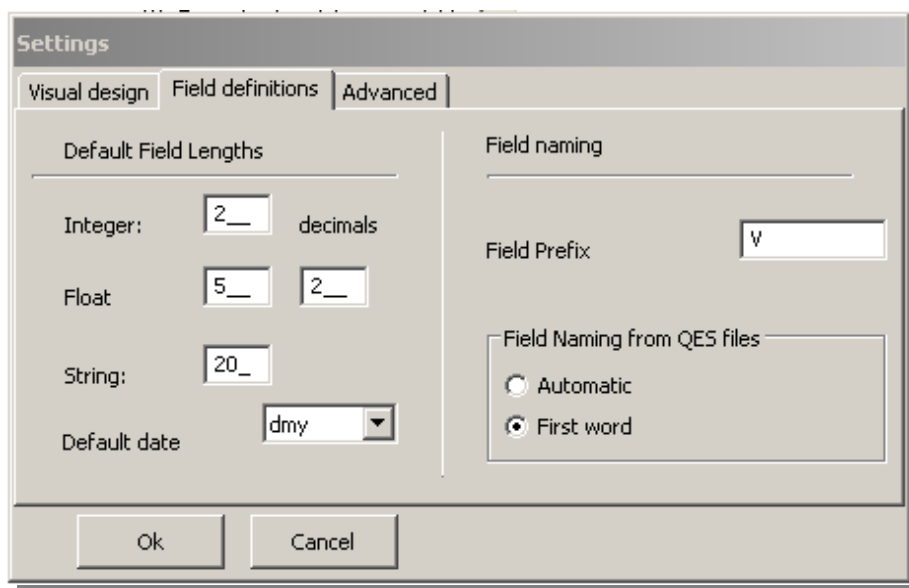
The screenshot shows a software interface with a data form on the left and an editor window on the right. The data form has two variables: 'V5 is my question' and 'Happened on'. The editor window has a menu bar with 'File' and 'Edit' and contains two lines of text: '1 This is my question ##' and '2 Happened on <dd/mm/yyyy>'.

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, as shown in the figure.

On the visual design some tab snap regions are defined. When this is "on", the software tries to autoalign new fields in same x or y coordinates.



Align on data form

Do some experimentation with alignment. (F10), which currently has two parts:

- Vertical distance (default will be one column for all fields, and distance from settings)
- Equal distance btw. fields. (fields are kept on same "lines", only "y" distance changed)

Label alignment moves value labels to either same position (left) or right aligned just before entry fields.

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).

See next page also.

Common Commands/Uses

Command	Linux	Mac ¹⁾	Windows
Open	Ctrl+O	Ctrl+O	Ctrl+O
Save	Ctrl+S	Ctrl+S	Ctrl+S
Save As..	Ctrl+Shift+S	Ctrl+Shift+S	Ctrl+Shift+S
Settings	Alt+S	Alt+S	Alt+S
Help	F1	F1	F1
Editor/entry notes	F11	F11	F11
Quit/Exit	F12/Alt+F4	F12/Cmd+Q	F12/Alt+F4

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 Label Field	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).

Shortcut	Command	OS*
F7	(not used)	
F8	Paste as QES	L, W
F9	(not used)	
F10	Align fields	W
F11	Editor	L, W

Other shortcuts:

Shortcut	Command	OS*
Enter	Edit selected field	L, W
Ctrl+N	New dataform	L, M, W
Ctrl+V	Paste as Default	L, M, W
Ctrl+Shift+Q	Import structure	L, M, 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