



Onyx User Guide

Onyx Version 1.8

Onyx User Guide: Onyx Version 1.8

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Chapter 1. Introduction

If you are new to Onyx and would like a gentle introduction, this chapter is for you.

If you are already familiar with Onyx and need specific information about how to do something, skip this chapter and find the topic you need by scanning the table of contents or by searching for some key words that describe what you are looking for.

This chapter covers these topics:

- [What Onyx is \(page 1\)](#)
- [Key concepts related to the way Onyx works \(page 2\)](#)
- [What Onyx does \(page 5\)](#)
- [Who makes Onyx \(page 6\)](#)
- [Onyx documentation \(page 6\)](#)
- [Onyx user support \(page 9\)](#)

What is Onyx?

Onyx is a web-based application used to manage participant baseline interviews by assessment centres and clinics that are collecting data for research. Typically, the data is being collected for biobanks or large-scale population studies. [Figure 1.1 \(page 2\)](#) shows the typical assessment centre activities that Onyx supports. As shown in the figure, Onyx is installed on a server in the assessment centre and can be accessed from workstations via the assessment centre's intranet. An assessment centre may have one or more workstations dedicated to collecting data using Onyx.

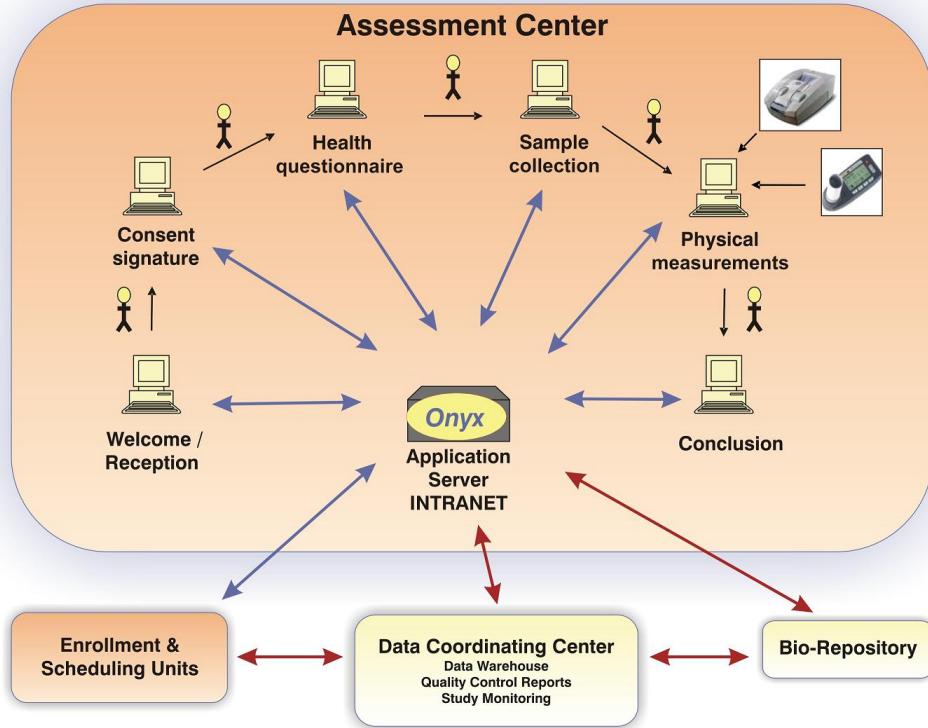


Figure 1.1. Onyx facilitates the typical activities of the staff at an assessment centre

A Highly Customizable Software Solution

Onyx is modular as shown in [Figure 1.2 \(page 3\)](#). The Onyx engine is a backbone into which independent data collection components are inserted. Onyx is *configurable* which means certain stages may or may not be included in your version of Onyx. For example, your study may not accept volunteer participants. And if a stage is included, it can be fine-tuned to meet the requirements of your study. For example, for your study Onyx may be configured to only accept electronic signatures for consent forms, whereas for another study Onyx may accept electronic or handwritten signatures. Onyx is also *customizable* which means certain stages are tailor-made for each research study. For example, each study develops its own questionnaires, and each study defines which physical measurements will be collected and in which order.

Key Concepts

Participant

A participant is a person who has come to the assessment centre in order to participate in the research study. Assessment centre staff collect data from participants by asking questions, collecting biospecimens, and taking physical measurements.

Each research study determines how they will recruit participants. Typically, participants are either [invited \(page 3\)](#) or [volunteers. \(page 3\)](#) Onyx can be customized to accept volunteer participants or not. Whether or not this functionality appears in Onyx at your assessment centre depends on how Onyx was configured for your study. See [Receiving vs. Enrolling Participants \(page 149\)](#).

💡 Invited Participant

A participant who was selected by the study and given an appointment time for their interview.

💡 Volunteer Participant

A volunteer participant (also known as a "walk-in") arrives at the assessment centre without an appointment. They heard about the study in some way and decided that they would like to participate.

💡 Interview

Onyx treats an interview as a set of interdependent stages that a participant goes through in order to complete their visit to the assessment centre. See [Figure 1.2 \(page 3\)](#). An interview starts when a staff member receives the participant and enters registration information for the participant in Onyx. The participant then passes through some or all the stages that have been defined for the study. The interview ends when a staff member clicks the **Close** interview button in Onyx.

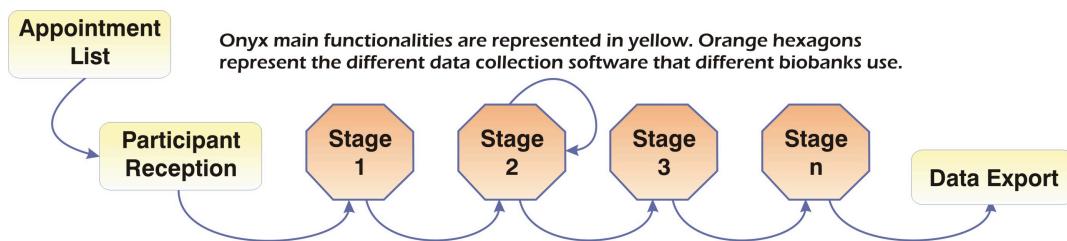


Figure 1.2. Onyx treats an interview as a set of interdependent stages

💡 Interview Stages

An interview stage is one of the interdependent parts of an interview during which a particular type of data is collected from the participant. Each research study defines the stages it requires to obtain the necessary data, as well as the sequence in which the stages appear in Onyx. Typical interview stages include:

- Signing a consent form
- Questionnaires (one or more)
- Physical measurements (one or more)
- Collection of biospecimens (one or more)
- Conclusion of the interview (may include printing a report for the participant that includes information considered appropriate by the research study)

Each research study defines its own stages, creates its own questionnaires, and decides which physical measurements and biospecimens must be collected. Onyx stores the data collected during the stages centrally and makes it available to all workstations.

Onyx Users

Onyx is used by the staff of an assessment center or a clinic that is collecting data from participants in a biobank study.

Onyx has four types of user:

- [Data Collectors \(page 4\)](#)
- [Participant Managers \(page 4\)](#)
- [Questionnaire Editors \(page 5\)](#)
- [System Administrators \(page 5\)](#)

Data Collectors

This type of Onyx user is responsible for one or more of these tasks:

- interviewing participants
- collecting biospecimens
- taking physical measurements

Onyx data collectors are typically nurses and technologists.

Participant Managers

This type of Onyx user coordinates the activities of [data collectors \(page 4\)](#). Participant managers can do the tasks of a data collector, and in addition, they can do these tasks :

- receiving participants
- enrolling volunteer participants (if your study permits this)
- updating the appointment list
- unlocking a locked interview

Questionnaire Editors

This type of Onyx user creates and edits the questionnaires that form part of an Onyx interview. Typically, this user would be a researcher who is involved in the design of the study, but not in interviewing participants. This role only gives a user the permission to create and edit questionnaires.

System Administrators

This type of Onyx user is typically an Information Technology Manager (IT Manager) who handles the technical tasks required to set up and maintain Onyx. This role gives a user the permission to manage users and data

What Onyx Does

Onyx facilitates the work of the staff members by allowing them to collect data electronically:

- obtain participant consent with the help of an electronic signature pad (if your assessment centre does not have a signature pad or the pad is not available, you record the fact that the patient signed a printed consent form in Onyx)
- complete onscreen questionnaires with participants
- set up participants to answer self-administered questionnaires on a touchscreen or a workstation
- record the collection of biospecimens (using a barcode scanner to identify the sample or entering a sample number manually)
- register physical measurements—such as height, weight, bone density, and any other measurements that the study may require

Onyx provides researchers with tools that allow them to optimize the workflow of baseline interviews:

- control stage availability and dependencies between stages (some examples: require that consent was obtained before an interview can proceed; prevent staff from

taking measurements or samples that are contraindicated; ensure that dependent measurements are done in the correct order)

- capture administrative parameters such as start and end times of each stage
- automate the calibration of electronic instruments used to take physical measurements
- produce personalized reports for participants
- export encrypted data to multiple destinations

Some things Onyx does not do

While Onyx includes many features and functions that an assessment centre needs, it does not include the following functionality:

- Onyx does not allow you to schedule participant appointments. The appointment list must be imported into Onyx.
- Onyx does not arbitrarily decide when and whether you can proceed with a certain stage of an interview. Onyx is highly configurable and customizable. Each research study defines its own questionnaires, the physical measurements and biospecimens to be collected, the order of interview stages, and the conditions for passing from one stage to another. Based on how your research study configured Onyx, Onyx may inform you that a stage is contraindicated or prompt you about what to do during a certain stage. For example because of the participant's answers to certain questions, Onyx might prompt you about how to measure the participant's blood pressure: **Use the participant's right arm to take blood pressure**
- Onyx does not allow you to analyze the data collected from participants. It can export the data to other destinations where the analysis can be done.
- Onyx is not a Laboratory Information Management System (LIMS). It does not track processing of biospecimens.

Who Makes Onyx

Onyx is developed by OBiBa, a collaborative international project whose mission is to build high-quality open source software for biobanks. To learn more about OBiBa, please have a look at our [website](http://www.obiba.org) [<http://www.obiba.org>].

Onyx Documentation

In addition to this PDF version of the *Onyx User Guide*, an Online Help version of this guide is being prepared.

Information about configuring Onyx can be found in the [Onyx Configuration Guide](http://wiki.obiba.org/confluence/pages/viewpage.action?pageId=9732166) [http://wiki.obiba.org/confluence/pages/viewpage.action?pageId=9732166].

Version of Onyx Covered by this Guide

This version of the *Onyx User Guide* describes Onyx 1.6, in particular, version 1.6.1 of Onyx.

How this Guide is Organized

Since most Onyx users are data collectors, most of this guide explains how to use Onyx to collect participant data. This guide also includes a chapter for Participant Managers and a chapter for System Administrators.

This guide consists of the following chapters:

- **Chapter 1: Introduction.** Presents Onyx. Includes key concepts that will help you understand Onyx's approach to baseline interviews. *For new Onyx users.*
- **Chapter 2: Getting Started.** Presents the Onyx **Home** page. Explains how to log in to Onyx and the simplest way to start an interview. *For new Onyx users.*
- **Chapter 3: Viewing Participants.** Presents the **Participants** page and key concepts related to viewing participants. Explains the ways you can search for a participant in Onyx. *For new Onyx users.*
- **Chapter 4: Managing an Interview.** Presents the **Interview** page and key concepts related to navigating through an interview. Covers various ways to access and exit the stages of an interview: starting, stopping, pausing, resuming, and so on. *Of most interest to Onyx data collectors and participant managers.*
- **Chapter 5: Obtaining Participant Consent.** Presents Onyx's way of handling participant consent. Covers electronic consent forms and registering paper consent. *Of most interest to Onyx data collectors and participant managers.*
- **Chapter 6: Completing Questionnaires.** Presents key concepts related to the way questionnaires are handled in Onyx—such as assisted versus self-administered questionnaires. Since each study designs its custom questionnaires, the chapter explains the types of questions and answers users will see, rather than how to answer the particular questions in your study's questionnaires. *Of most interest to Onyx data collectors and participant managers.*
- **Chapter 7: Collecting Physical Measurements.** Presents key concepts related to physical measurement stages. Since each study determines the physical measurements it requires, the chapter explains the general workflow of a physical measurement stage

and demonstrates the workflow with an example stage. *Of most interest to Onyx data collectors and participant managers.*

- **Chapter 8: Collecting Biospecimens.** Presents key concepts related to stages used to record the collection of biospecimens. Since each study determines the biospecimens it requires, the chapter provides an example biospecimen collection stage. *Of most interest to Onyx data collectors and participant managers..*
- **Chapter 9: Managing Your Onyx User Profile.** Explains how to do a few tasks that customize Onyx for you: changing your password and changing the language of the Onyx user interface (English or French are currently available). *For all Onyx users.*
- **Chapter 10: Managing an Onyx Workstation.** Presents the Workstation page and key concepts related to storing data about a workstation. Explains how to register and calibrate instruments used for physical measurements, and how to maintain logs of experimental conditions. *Of most interest to Onyx users who will register and calibrate instruments, and log experimental conditions.*
- **Chapter 11: Topics for Participant Managers.** Explains certain tasks that only participant managers can do—such as receiving and enrolling participants. *Of most interest to participant managers..*
- **Chapter 12: Topics for System Administrators.** Explains certain tasks that only system administrators can do—such as managing Onyx users, and exporting and purging data. *Of most interest to system administrators.*

Icons Used in this Guide



Key Concept: This icon appears beside explanations of key concepts. In most chapters of this guide, you will find explanations of key concepts relevant to the chapter.



Customizable: This icon appears besides notes that explain a feature of Onyx that can be customized. Since each study customizes Onyx for its needs, these sections explain why you may not see a certain feature in your version of Onyx.



Procedure: This icon appears beside procedures—step-by-step instructions for performing a task in Onyx.



Example: This icon appears beside examples that are provided instead of a procedure. Since studies can customize Onyx in many ways, it is often not possible to provide a step-by-step procedure that would correspond to what you would see in your study's version of Onyx. Examples give you the general idea of how to do some task in Onyx, without giving you detailed directions.



Pointer: This icon appears beside suggestions that could make your work in Onyx a little easier.

Onyx Support

- You can reach Onyx customer support by email at: support@obiba.org
- You can join the [OBiBa users group](http://groups.google.ca/group/obiba-users?hl=en) [<http://groups.google.ca/group/obiba-users?hl=en>]. New releases of Onyx are announced through this group. You can use this forum to make comments, to ask questions, and to share ideas with other users of OBiBa software.
- You can visit the [OBiBa website](http://www.obiba.org) [<http://www.obiba.org>] where you will find:
 - News stories and presentations about Onyx and other OBiBa products
 - [JIRA](http://jira.obiba.org) [<http://jira.obiba.org>], an issue-tracking system that allows you to enter bug reports, request new features, and suggest ways to improve Onyx

Chapter 2. Getting Started

This chapter is your starting point for jumping in and starting to use Onyx. Sit down in front of an Onyx workstation and try the things described in this chapter.

This chapter covers these topics:

- [How to log in \(page 10\)](#)
- [Onyx home page \(page 11\)](#) and the [features \(page 12\)](#) it shares with other pages of Onyx
- [How to start an interview \(page 13\)](#)



Logging In

The first step in using Onyx is *logging in*—also known as *signing in*. You must log in at the beginning of your work day or shift. When you have finished your work session, you should log out.

If you stay logged in for an extended period of time without touching the keyboard or mouse, Onyx automatically logs you out. Sometimes this is called "timing out". If Onyx logs you out, you must log in again as explained in this section.

Prerequisites

To log in, you need to know your user name and password. If you do not know them, speak to your manager or system administrator.

Procedure

1. If the Onyx login dialog ([Figure 2.2 \(page 11\)](#)) is not displayed on your workstation, locate the **Onyx** icon ([Figure 2.1 \(page 10\)](#)) on the desktop of your workstation.

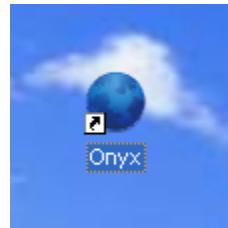


Figure 2.1. The Onyx icon

2. Double-click the **Onyx** icon. The [Onyx login \(page 11\)](#) dialog should now be displayed on your workstation.

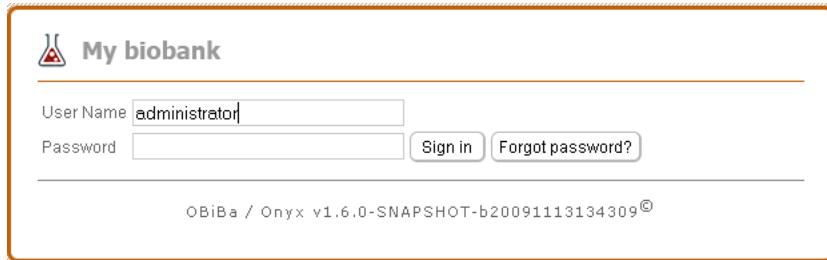


Figure 2.2. The Onyx login dialog

3. Enter your user name and password and click the **Sign in** button. The Onyx **Home** page is displayed. See [Figure 2.3 \(page 11\)](#).

The Onyx Home Page

After you log in to Onyx, the **Home** page is displayed. This is the page that you will use to start or resume the interview of a participant who has already been received at the assessment centre. [Figure 2.3 \(page 11\)](#) shows the **Home** page and points out its main features. These features are described below [Figure 2.3 \(page 11\)](#).

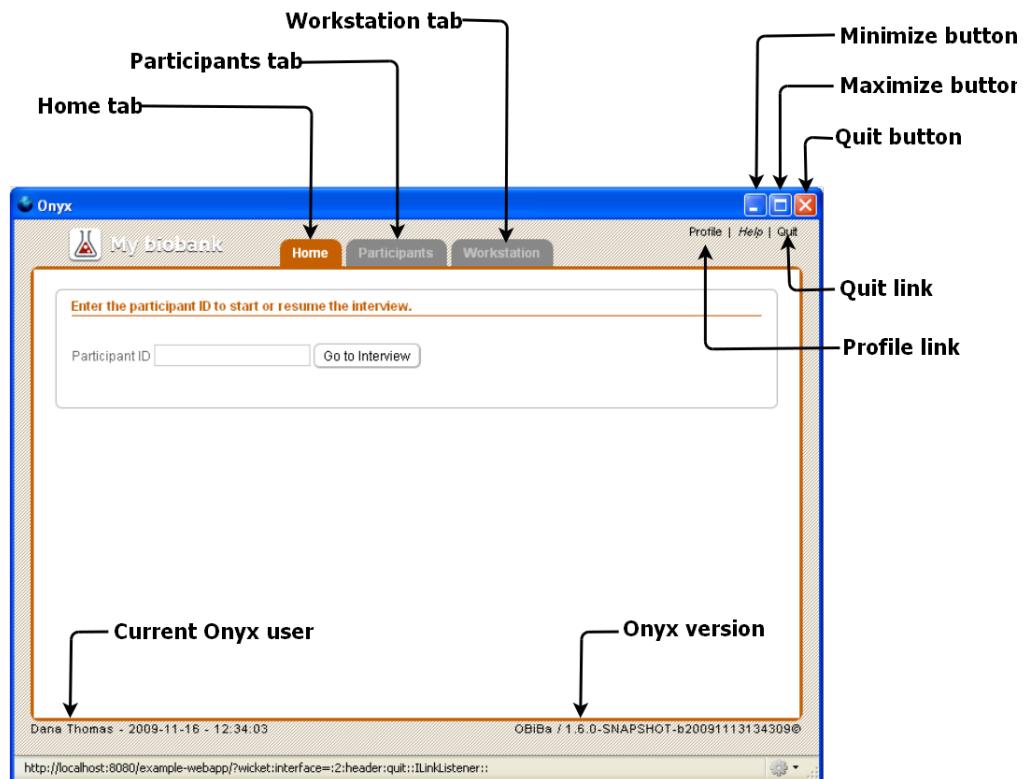


Figure 2.3. The Onyx Home page

Features Common to the Home Page and Other Pages

These features appear around the edge of the **Home** page, as well as two other pages of Onyx—the **Participants** page and the **Workstation** page:

- **Home tab** — displays the Home page in which you can select a participant to interview (if you know their ID or can scan their barcode)
- **Participants tab** — display the Participants page in which you can view the list of participants and to select a participant to interview
- **Workstation tab** — displays the Workstation page in which you can register and calibrate instruments connected to the workstation, and to keep logs of room and environmental conditions



The **Workstation** page might not be visible if your study did not define any physical measurement stages or experimental condition logs.

- **Current Onyx user** - the user name of the Onyx user who is currently logged in, and the date and time when they logged in
- **Current version of Onyx** — the version of Onyx that you are currently using
- **Profile link** — allows the current user to change their profile (language and password)
- **Quit link** — allows you to close Onyx. Always exit the interview you are working on before clicking the **Quit** link.
- **Help link** — not currently functional
- **Standard Windows buttons:**
 - **Minimize** button - allows you to minimize Onyx (to a button at the bottom of the screen)
 - **Maximize/Reduce** button - allows you to go back and forth between full-screen and reduced window size
 - **Quit button** button - allows you to close Onyx (same as the [Quit link \(page 12\)](#))
- **Keyboard shortcuts:**
 - To increase the font size of text: Press **Ctrl** and + keys.
 - To decrease the font size of text: Press the **Ctrl** and - keys.

- To jump forward between fields and/or buttons: Press the **Tab** key.
- To jump backward between fields and/or buttons: Press the **Shift** and **Tab** keys.



The Simplest Way to Start an Interview

Usually, a [participant manager](#) (page 4) receives participants and registers them. During registration, a [participant ID](#) (page 19) is assigned to the participant. After a participant has been registered and has a participant ID, you can start their interview as explained in this section.

After you start an interview, you will proceed through the various stages of the interview with the participant: obtaining consent, answering questionnaires, and so on. During a stage or between the stages, you may need to pause the interview. If an interview has been paused, you can resume it as explained in this section.

Prerequisites

To start or resume an interview for a participant:

- The participant must have been received or enrolled. Only [participant managers](#) (page 4) can receive and enroll participants. See [Receiving a participant](#) (page 150) and [Enrolling a volunteer participant](#) (page 154).
- You must know the participant's Participant ID or, if your assessment centre uses barcodes and you have access to a barcode scanner, you can scan the barcode used for the Participant ID. If you do not know the Participant ID, you can search for it, see [Finding a participant](#) (page 23).

Procedure

1. If the **Home** page is not displayed, click the **Home** tab.

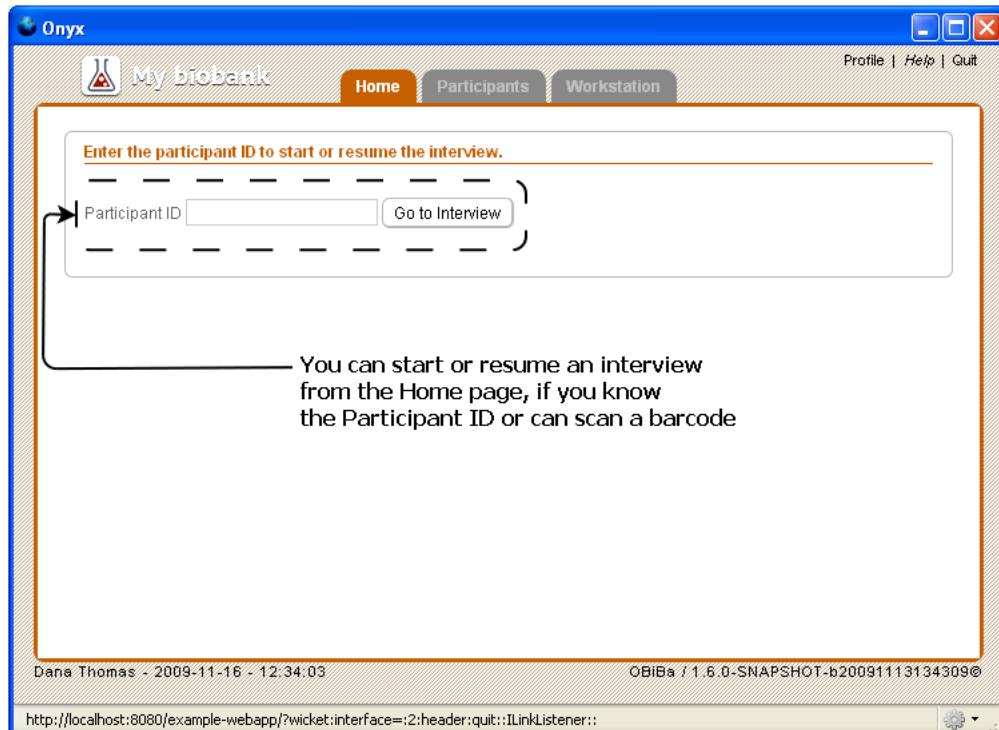


Figure 2.4. The simplest way to start an interview is from the Home page

2. Enter the participant's Participant ID in the field on the **Home** page. Or, if your assessment centre uses barcodes, scan the participant's barcode—the number read by the scanner appears in the **Participant ID** field.

Alternatively, if you know the participant's Enrollment ID, you may enter that instead.

3. Select the **Go to Interview** button. The **Interview** page is displayed—see [Figure 2.5 \(page 15\)](#) You are now ready to proceed with the interview—see [Interviewing Participants \(page 28\)](#).

Getting Started

The screenshot shows the 'My Biobank' software interface for an interview session. At the top, there's a header with the title 'My biobank' and tabs for 'Interview' and 'Exit X'. Below this, the 'Participant' section displays the participant ID (3456789) and name (Steve Baker). The 'Interview' section shows the start date (2010-01-29 14:38), end date, and status ('In Progress'). The 'Log' section includes a 'View' button and a 'Comments (0)' button. The 'Stages' section lists various study items with their names and current status ('Not ready'). A large table below lists these items with columns for Name, Status, Start, End, Actions, and Log. The 'Actions' column contains a 'Start' link for each item. At the bottom, there's a button labeled 'Exit this interview' and a footer with the date 'Patricia Martin - 2010-01-29 - 14:38:13' and the version 'OBIBa / 1.6.0-SNAPSHOT-b72940'.

#	Name	Status	Start	End	Actions	Log
1	- Participant Consent	Ready			Start	
2	- CI Preliminary Questionnaire	Not ready				
3	- NoddleTest Cognitive Test	Not ready				
4	- Standing Height	Not ready				
5	- Sitting Height	Not ready				
6	- Hips and Waist	Not ready				
7	- Blood Pressure	Not ready				
8	- Grip Strength	Not ready				
9	- Weight and Bioimpedance TBF-310	Not ready				
10	- Weight	Not ready				
11	- Spirometry	Not ready				
12	- Electrocardiogram	Not ready				
13	- Bone Density	Not ready				
14	- Arterial Stiffness	Not ready				
15	- Demo Questionnaire - Self Administered	Not ready				
16	- Demo Questionnaire - Assisted	Not ready				
17	- Blood/Urine Samples Collection	Not ready				
18	- Urine Samples Collection	Not ready				
19	- Conclusion	Not ready				

Figure 2.5. The Interview page—ready to start the interview

Chapter 3. Viewing Participants

Onyx stores information about participants in its database on a server computer located in the assessment centre. All Onyx workstations can access the database. The **Participants** page allows you to view a list of the participants in the database and to find individual participants so that you can view or edit their registration information, and work on their interviews.

This chapter includes these topics related to viewing participants in the **Participants** page:

- The [Participants page \(page 16\)](#) and its important features
- [Key concepts \(page 18\)](#) related to viewing participants
- Procedures related to viewing participants
 - [Displaying a list of all participants \(page 20\)](#)
 - [Viewing appointments for the day \(page 21\)](#)
 - [Viewing all interviews in progress \(page 21\)](#)
 - [Finding a participant \(page 23\)](#)
 - [Viewing a participant's registration information \(page 24\)](#)
 - [Determining who has a lock on a participant \(page 26\)](#)

The Participants Page

When you select the **Participants** tab, the **Participants** page is displayed. This page gives you access to all the participants in the Onyx database. The **Home** page gives you one way of finding a participant. The **Participants** page lets you find a participant in a number of ways. [Figure 3.1 \(page 17\)](#) shows the **Participants** page and points out some of its more important features.

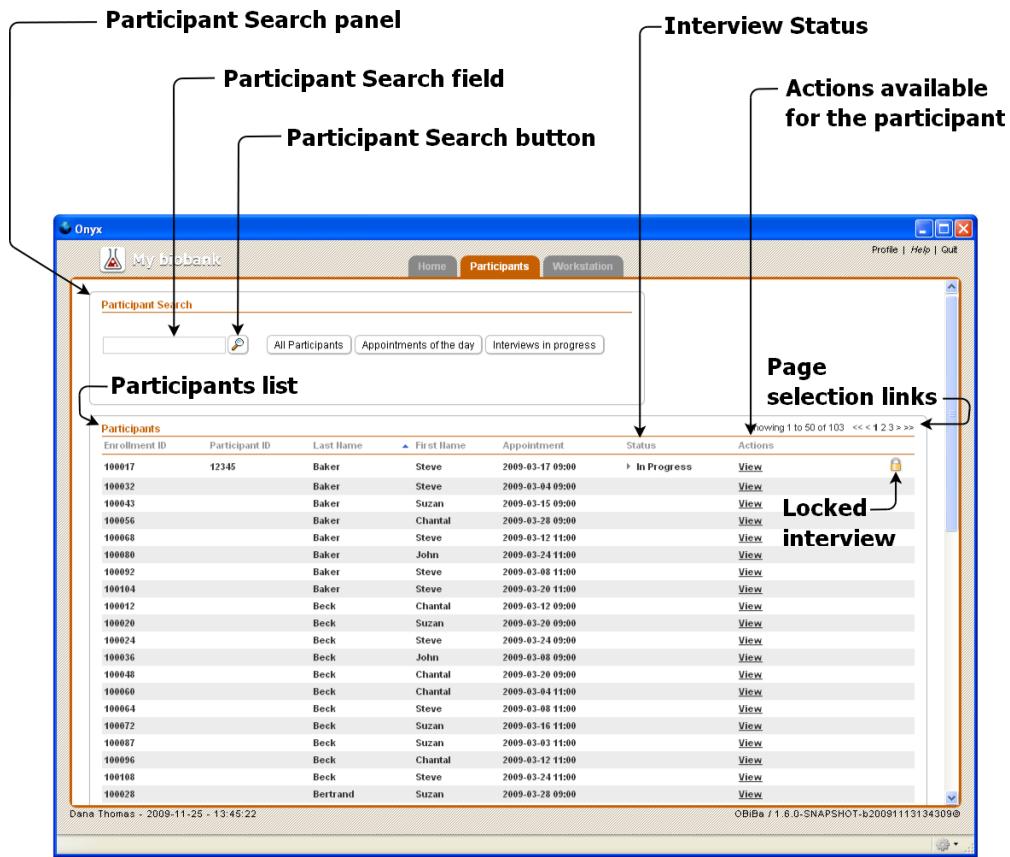


Figure 3.1. The Participants page

Here is an overview of the important features of the **Participants** page:

- The **Participants Search panel** — includes three buttons that give you easy access to participants that you often need to view:
 - the **All Participants** button - displays a list of all the participants in the Onyx database
 - the **Appointments of the day** button - displays a list of all the participants who have appointments on today's date
 - the **Interview in progress** button - displays a list of all the participants whose interviews have the status **In progress** (page 20)
- The **Participant Search field** and button - allow you to search for a particular patient by name or ID
- The **Participants** list occupies the lower part of the page. Initially, it is empty, but after you do a search, it is filled with a list of participants.

- The **Actions** column contains one or more action links beside each participant. These are the actions you can do for the participant—for example: **View** their registration information and **Interview** them.
- The **Page selection links** (Showing 1 to 50 of 103 <<< 1 2 3 >>>). If the **Participants** list contains many participants, they are displayed on several pages. These links allow you to view the different pages.
- A **Locked interview** (indicated by a small  icon) means that some user is interviewing the participant. See [Locked \(page 20\)](#) status.

Key Concepts

This section contains key concepts related to viewing participants.

Participants List

A list of participants stored in the Onyx database.

When you are in the **Participants** page, you can choose to see some or all of the participants in the Onyx database by filtering the participants list in various ways: by name, enrollment ID, or participant ID. You can view all participants with appointments today or those currently being interviewed.

Appointment List

A list of appointments stored in a file or created in a programme other than Onyx.

Since Onyx does not allow you to schedule appointments for participants, it imports an *appointment list* from a file or another programme. Onyx users of the type [participant manager \(page 4\)](#) can [update the appointment list \(page 159\)](#).

As a minimum, the appointment list contains the following information for each participant:

- participant name
- appointment date and time
- [enrollment ID \(page 19\)](#)



The appointment list may contain other information depending on how Onyx was configured for your study.



Enrollment ID

A unique identifier for a participant that is imported into Onyx from the appointment list.

Enrollment IDs are either assigned automatically by the programme that schedules appointments, or they are defined in the file containing the appointment list. After the participant has been received, the Enrollment ID is not used very much in Onyx. Instead, the [Participant ID \(page 19\)](#) is used to identify the participant during the interview. However, you can search for a participant by their Enrollment ID.



You may notice that some participants do not have an Enrollment ID. This is probably because your study accepts [Volunteer Participants \(page 3\)](#). Volunteers do not have an enrollment ID since they were never on an appointment list.



Participant ID

A unique identifier for a participant that must be entered in Onyx when the participant arrives at the assessment centre and at various times during the interview.

Each study or assessment centre decides how it will assign Participant IDs and the format of its Participant IDs (the pattern of numbers and letters in the ID). Some studies use barcodes that can be scanned and displayed automatically in Onyx. Other studies will require you to enter the Participant ID manually.



Participant Barcode

A barcode that is used for the [Participant ID \(page 19\)](#).

Some studies use a barcode as the source of Participant IDs. The barcodes may be on a blood collection tube, an ID bracelet, or a label of some sort. If your study uses barcodes, a barcode scanner will be connected to your Onyx workstation so that you can easily obtain the Participant ID.



Interview Status

The current state of a participant's interview. See also [Stage Status \(page 31\)](#).

The status of a participant's interview appears in the **Status** column of the **Participants** list. Before a participant has been received, nothing appears in the status column for that participant. After a participant has been received, their interview can have one of these statuses:

- **In Progress** — This status means that the participant has been received and that their interview has been started. Even if the participant leaves the room for some reason (and a stage of their interview has been paused), the status of their interview remains **In Progress**. See [Displaying a list of In Progress interviews \(page 22\)](#).
- **Locked** — The lock icon  means another staff member is interviewing the participant. If you suspect that there is a problem or if you need to work on the interview, contact your participant manager who can remove the lock, if necessary. See [Unlocking an Interview \(page 162\)](#).
- **Completed** — This status means that the interview was completed and that all stages were completed successfully and the interview was concluded correctly by a staff member.
- **Closed** — This status means that the interview was closed without all the stages being completed. An interview can be closed at any stage, if necessary. A closed interview cannot be restarted. The data collected cannot be changed in any way. Depending on how your study configured Onyx, it may or may not be possible to export the data. See [Closing an Interview \(page 54\)](#).
- **Cancelled** — This status means that the participant was withdrawn from the study. A staff member cancelled the interview. A cancelled interview cannot be restarted. See [Cancelling an Interview \(page 52\)](#).



Your study customized what Onyx does when an interview is cancelled or closed. It may delete the participant or may keep some or all of the data so it can be exported.

Procedures

This section contains procedures related to viewing participants, their registration information, and their interviews.



Displaying a List of All Participants

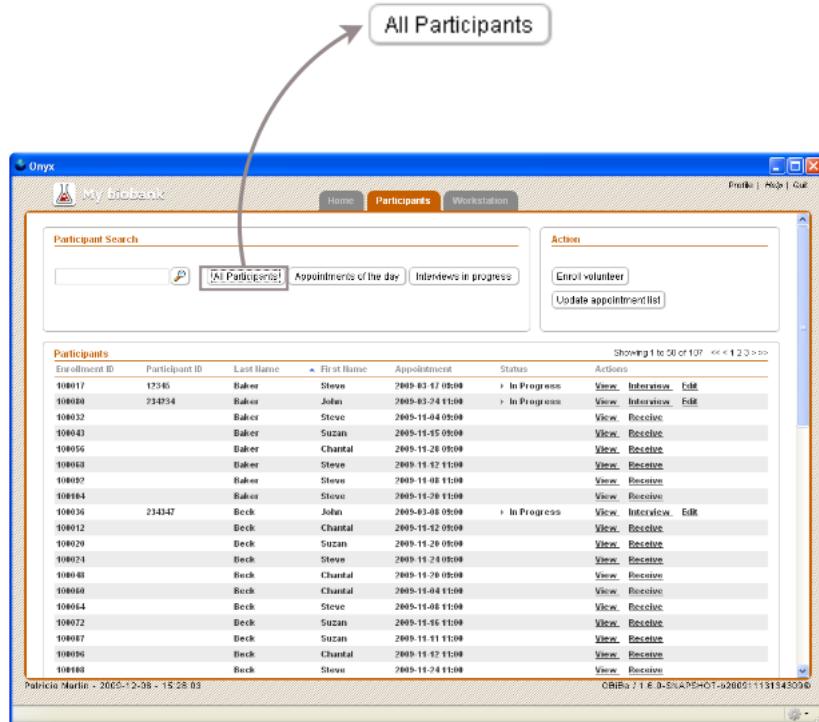
You can view a list of all the participants in the Onyx database: past and future participants, as well as those whose interviews are scheduled for the current date—today.

Viewing Participants

The list does not include participants that have been purged from the Onyx database. See [Data Purge \(page 166\)](#).

Procedure

1. If the **Participants** page is not displayed, click the **Participants** tab.



2. Click the **All Participants** button. The **Participants** page is updated to show all participants in the Onyx database.



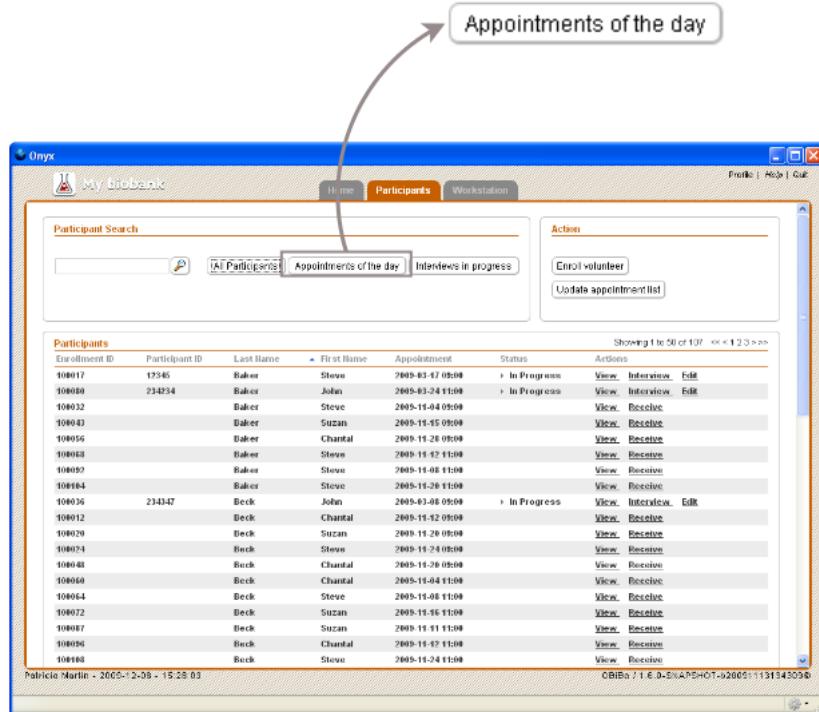
Displaying a List of Today's Interviews

You can view a list of all the participants whose interviews are scheduled for the current date—today.

Procedure

1. If the **Participants** page is not displayed, click the **Participants** tab.

Viewing Participants



- Click the **Participants** tab.
- Click the **Appointments of the day** button. The **Participants** list is updated to show all participants who have interviews today.

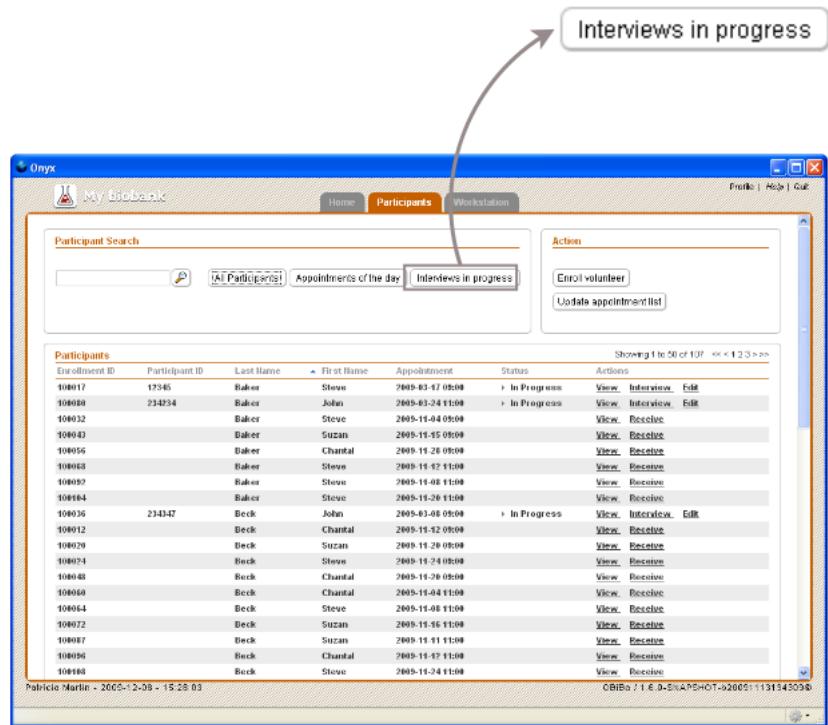


Displaying a List of Participants Currently Being Interviewed

You can view a list of all the participants whose interviews have the status **In Progress** (page 20). This status does not necessarily mean that the participant is seated with a staff member and that data is being collected from the participant. **In Progress** simply means that the participant's interview was started and that it is not finished yet.

Procedure

- If the **Participants** page is not displayed, click the **Participants** tab.



- Click the **Interviews in progress** button. The **Participants** list is updated to show all participants whose interviews have the status **In Progress**.

If you see a icon at the end of the row for the participant, this indicates that an Onyx user has a lock on the interview. See [Determining who has a lock on a participant \(page 26\)](#).



Finding a Participant

Onyx gives you several ways to find participants. [Table 3.1 \(page 23\)](#) summarizes the techniques you can use to search for participants.

Table 3.1. Techniques for finding a participant

Technique	Result
Scan participant's barcode (or enter participant ID manually) in the Home page and click Go to interview	The participant's Interview page opens.
Scan participant barcode (or enter participant ID in the search field) in the Participants page and click	The Participants list is updated and will include only one participant—the one with the scanned barcode

Technique	Result
Enter participant ID or enrollment ID in search field on Participants page and click 	The Participants list will be updated and will include only one participant—the one with the ID that you entered.
Enter all or part of participant's name in search field in the Participants page and click 	The Participants list is updated—it contains one or more participants, depending on what you entered and the names of the participants in the database.
<p>Sort the Participants list by clicking on the heading of a column. You can sort on:</p> <ul style="list-style-type: none"> • Enrollment ID • Participant ID • Last Name • First Name • Appointment 	<p>The Participants list will be reordered according to the column you selected.</p> <p>Examples:</p> <ul style="list-style-type: none"> • If you click on First Name, the list will be displayed in alphabetical order by participants' first names. • If you click on Enrollment ID, the list will be displayed in numerical order of enrollment IDs.

If you cannot find a particular person who has arrived for an interview, a couple of explanations are possible:

- The appointment list may not be up-to-date.
- The person does not actually have an interview.

In either case, contact your participant manager who can update the appointment list or enroll a volunteer if your study accepts them.



Viewing a Participant's Registration Information

After a participant has been added to the Onyx database (either through an update of the [appointment list \(page 18\)](#) or when they were enrolled as a [volunteer \(page 3\)](#)), you can view their registration information.

Procedure

1. If the **Participants** page is not displayed, click the **Participants** tab.

Viewing Participants

2. Find the participant whose information you want to view. If you need help finding the participant, see [Finding a Participant \(page 23\)](#) When the **Participants** list is displayed, a **View** link appears (in the **Actions** column) for the participant. See [Figure 3.2 \(page 25\)](#).

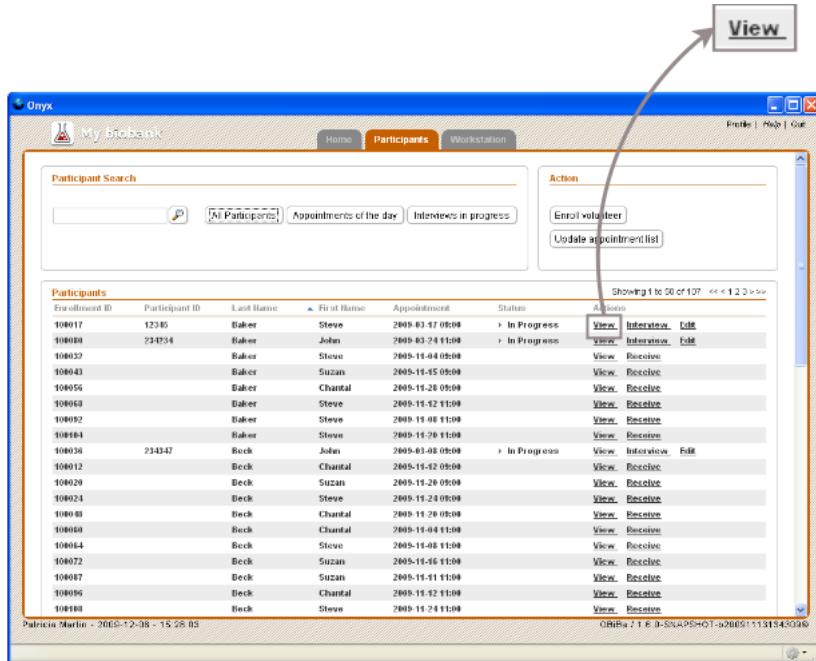


Figure 3.2. To view a participant's registration information, click their View link.

3. Select the **View** link for the participant. The **Participant** dialog is displayed. See [Figure 3.3 \(page 26\)](#).



Each study defines the information that is stored for its participants. You may not see the same fields as those shown in [Figure 3.3 \(page 26\)](#).

Participant	
Enrollment ID	100080
Participant ID	234234
Name	John Baker
Gender	M
Birth Date	1970-06-06
<hr/> Address <hr/>	
Street	799 Lakeshore Rd
City	Pointe-claire
Province	QC
Country	CA
Postal Code	H8R 2W3
<hr/> Phone 514-343-9898 ext 9573	
<hr/> <div style="text-align: right;">Close</div>	

Figure 3.3. Example: Participant dialog—each study defines the information that is stored for participants

4. When you have finished viewing the information, select the **Close** button. The **Participant** dialog closes.



Determining Who Has a Lock on an Interview

If a lock icon (🔒) is displayed at the right end of the row for a participant in the **Participants** list, an Onyx user has a lock on the interview, they are probably in the middle of an interview stage. You might even have a lock on the interview yourself, if you logged in on another workstation and worked on the interview from there. You can find out who has a lock on the interview as follows:

- Move the mouse until the arrow cursor is on the lock icon and do not move the mouse for a few seconds. A small popup message will show the name of the person who has the lock on the interview. See [Figure 3.4 \(page 27\)](#).

Viewing Participants

Status	Actions
In Progress	View Interview Edit 
In Progress	Dana Thomas has a lock on this interview
In Progress	View Interview Edit
In Progress	View Interview Edit
In Progress	View Interview Edit

Figure 3.4. To see who has a lock on an interview, position the mouse cursor on the lock icon and do not move the mouse.

If necessary, your participant manager can unlock the interview. See [Unlocking an interview \(page 162\)](#).

Chapter 4. Managing an Interview

Interviewing a participant in Onyx is a multiple stage process. You enter and control the interview from one place, the **Interview** page, which gives you access to all the stages of the interview for a particular participant. Interview stages include everything from signing a consent form to concluding the interview. Most stages are questionnaires, collection of biospecimens, and physical measurements.

Due to Onyx's high degree of customizability, this chapter cannot cover the actual stages defined by your study. Instead, this chapter covers the features and procedures that allow you to start an interview, to work your way through the stages of the interview, and to end an interview a safe way in various circumstances. By *safe*, we mean, so that you do not lose any data that you have collected.

This chapter covers these topics:

- The [Interview page \(page 28\)](#) and its important features
- [Key concepts \(page 31\)](#) related to the interview workflow
- The interview workflow broken down into steps ([page 36](#))
- [Routine procedures at the interview level \(page 39\)](#)
- [Routine procedures at the stage level \(page 45\)](#)
- [Procedures for unusual situations \(page 52\)](#)(such as a participant withdrawing from the study or leaving before the interview is complete)

The Interview Page

When you find a participant and click their **Interview** link, the **Interview** page is displayed. This page gives you an overview of a participant's interview and shows the status of each interview stage. It is from this page that you start working on each stage of an interview and to which you are returned after a stage is complete. [Figure 4.1 \(page 29\)](#) shows the **Interview** page and points out some of its more important features.

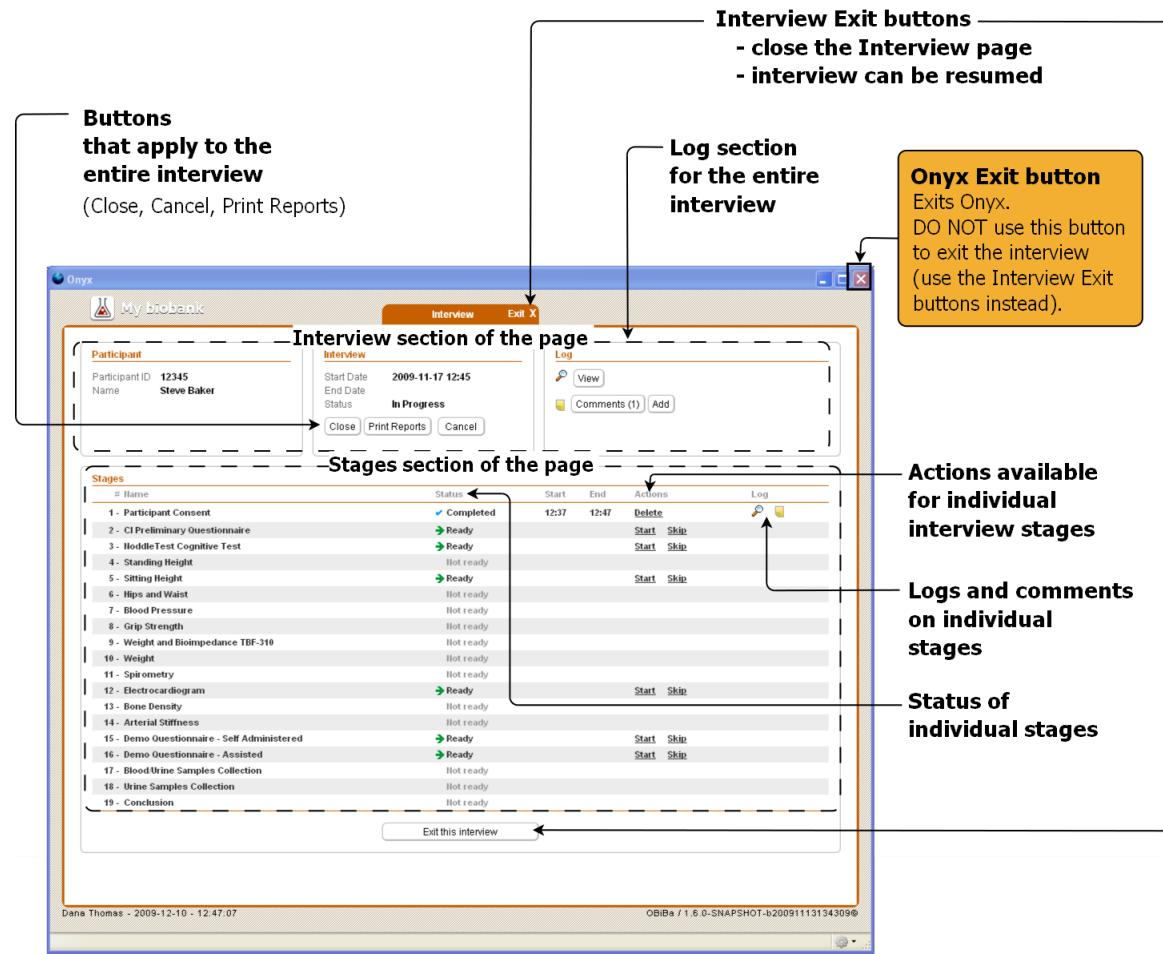


Figure 4.1. The Interview page

Here are the important features of the **Interview** page:

- **Interview Exit buttons.** The **Exit X** and the **Exit this interview** button both close the **Interview** page properly—they release the lock that was put on the interview when you entered the **Interview** page. See [Obtaining a Lock on an Interview \(page 31\)](#).

You can select either **Exit** button when you need to leave the **Interview** page before the interview is complete. They can be used at any time and do not affect the status of the interview.

Some examples of when you would exit an interview (using either of these buttons):

- After you complete a stage and need to take a break
- After you view the state of the participant's interview for information purposes
- When you have finished the stages for which you are responsible and are ready to pass the participant over to another staff member

The two **Exit** buttons function in exactly the same way—there are two of them for convenience sake.

- The **Onyx Exit button** (the X in the upper right corner of the Onyx window—see [Figure 4.1 \(page 29\)](#)) is not the same as the **Interview Exit** buttons. If you select the **Onyx Exit button** while in the **Interview** page, Onyx will close immediately without releasing your lock on the interview. The next time anyone (including you) looks for the participant in the **Participants** list, a lock will be displayed on the interview. A participant manager will have to unlock the interview. See [Unlocking an Interview \(page 162\)](#).
- **Close** button — You select this button if you need to end the interview early (before all stages are complete), but do not need to withdraw the participant from the study.

CAUTION: If you select **Close**, you will not be able to resume the interview.



Each study defines what will be done with the data acquired to the point of stopping an interview in this way.

- **Print Reports** button — Each study can define one or more reports that can be printed and given to the participant. You can select this button after any stage of an interview. It allows you to print reports as you go along rather than waiting until all stages are complete.
- **Cancel** — You select this button if you need to cancel the interview and withdraw the participant from the study.

CAUTION: If you select **Cancel**, you will not be able to resume the interview.



Each study defines what will be done with the data acquired to the point of cancelling the interview.

- **Log** panel (in the Interview section of the page) — You use the buttons in this panel to view system messages and user comments for all the stages of the interview. You can also enter general comments about the interview.
- **Log** column (in the Stages section of the page) — You click the icons in this column to view logs (system messages and user comments) about particular stages of the interview. You can also view a list of user comments only for a particular stage.
- (View button) — The **Interview** page contains several of these buttons: one for the interview in general, one for each interview stage that has been started. When you want to view a particular log, click its button.

-  (**Comments** button) — Onyx users can add comments about the interview in general and about individual interview stages. The **Interview** page contains one or more of these buttons: one for the interview in general and one for each interview stage that has user comments. When you want to view user comments, click the appropriate  button.
- **Status** column (in the Stages section of the page) indicates the status of each stage of the interview. See [Stage Status \(page 31\)](#).
- **Actions** column (in the Stages section of the page) indicates the actions that are available for each stage of the interview. See [Stage Actions \(page 31\)](#).

Key Concepts

This section contains key concepts related to working your way through the stages of an interview.

Obtaining a Lock on an Interview

When you enter the **Interview** page of a participant, you obtain a lock on the interview. No other user can access the participant's Interview page until you exit the **Interview** page properly (by selecting an **Interview Exit** button—see [Interview Exit buttons \(page 29\)](#)). If Onyx crashes or if you exit the **Interview** page improperly (by selecting the **Onyx Exit** button—see [Figure 4.1 \(page 29\)](#)), a participant manager will have to unlock the interview. See [Unlocking an Interview \(page 162\)](#).

Stage Status

An interview stage passes through various statuses from "ready" to "completed". Each type of stage (consent, questionnaire, physical measurement, specimen collection, interview conclusion) follows a particular path through the statuses. The **Actions** that are available depend on the **Status** of the stage



Each study defines the conditions that are required for a stage's status to change. A study can customize the names of the statuses that appear in the **Interview** page.

Stage Actions

The **Actions** column lists the actions that are available to you for a particular stage of the interview. The Actions depend on the status of the stage.



Each study defines the actions that are available when a stage has a certain status. A study can also customize the names of the actions that appear in the **Interview** page.

Despite all the customization that Onyx allows, only five stage actions are possible: By default, the actions have the names indicated in this list.

- **Start** — You select this action to start a stage.
- **Skip** — You select this action to skip a stage. Some examples of why you might need to skip a stage: the stage is **Not ready**; it is more convenient to do the stage later; another staff member is responsible for the stage.
- **Reinstate** — You select this action to redo a stage that was skipped.
- **Cancel** — You can cancel a stage that is contraindicated or not applicable for some reason.
- **Review** — You can review a stage that was contraindicated in order to determine if the contraindication is appropriate or, if the answers that caused it should be corrected so that the contraindication will be removed.



Closing vs. Cancelling an Interview

Closing an interview means ending the interview early before all stages have been completed (or skipped, if your study permits). The participant is not withdrawn from the study.

Cancelling an interview means withdrawing the participant from the study. The decision to withdraw a participant may come from the participant or a staff member.

CAUTION: If you select the **Close** or **Cancel** button in the **Interview** page, you will not be able to continue the interview with the participant later. If you want to leave the **Interview** page temporarily and continue the interview later, you need to exit the **Interview** page. See [Figure 4.1 \(page 29\)](#).



Each study defines what will be done with the data acquired to the point of closing or cancelling an interview.



Reviewing vs. Reinstating a Stage

You can *review* a stage if its status is **Contraindicated**. If you review the stage and change the condition (for example, the answer to a particular question) that caused

the stage to be contraindicated, you can actually change the status of the stage from **Contraindicated** to **Ready**.

You can *reinstate* a stage that was skipped. When you reinstate a stage, its status will change to **Ready** and it will be possible to **Start** the stage again.

Action Windows



Depending on how your study customized Onyx, Onyx may display an *action window* when you select an **Action** in the **Interview** page. These windows usually require you to enter your password and the Participant ID (you can scan the barcode or enter it manually). An action window may contain other fields depending on the action that you selected and how your study customized the window. The purpose of action windows is to ensure the integrity of the data being collected. When you enter your password, you confirm that it was actually you who carried out the action. When you enter the **Participant ID**, you confirm that the data is indeed being collected for the correct participant. [Figure 4.2 \(page 33\)](#) shows an example action window.

The screenshot shows a modal dialog box titled "Participant Consent: Finish". It contains the following fields:

- Author: Dana Thomas
- Password*: [Redacted]
- Participant ID*: [Empty input field]
- Reason: Choose One
- Comment: [Large text area]

A note below the Reason field states: "To maintain participant anonymity, please make sure your comments do not include any identifiable references".

At the bottom right of the dialog are "Continue" and "Cancel" buttons.

Figure 4.2. Example of the action windows that may be displayed during an interview

Stage Navigation Buttons: Previous, Next, Finish

When you are in a stage, you will see various buttons at the bottom of the page. These buttons allow you to move back and forth through the pages of the stage and to finish the stage. See [Figure 4.3 \(page 34\)](#).



By default, the buttons are named as shown in [Figure 4.3 \(page 34\)](#). Your study may have changed the names on the buttons. .

Figure 4.3. The buttons that allow you to move through and finish the pages of an interview stage

You use the buttons as follows:

- **Next** button — Select it to display the next page in the stage.
- **Previous** button — Select it to display the previous page in the stage if you need to check or change something in that page.
- **Finish** button — This is only displayed when you are on the last page of a stage. You select it when you are ready to complete the stage.

You can also use hot keys to navigate through the pages. See [Hot Keys \(page 35\)](#).

Administration Button and Administration Dialog

The **Administration** button is always displayed at the bottom of the page during an interview stage. When you select the **Administration** button, the **Administration** dialog is displayed. See [Figure 4.4 \(page 35\)](#). You access this dialog when you need to pause or cancel the stage.

For a questionnaire stage, the dialog includes **First** and **Last** buttons. These buttons allow you to jump directly to the first and last pages that need your input. If no pages require your input, they jump to the first page or last page of the questionnaire.



Figure 4.4. The Administration dialog for a questionnaire stage

Hot Keys

To make the task of completing long questionnaires easier, Onyx allows you to use certain keyboard keys in a special way. When you are working in a stage, you can use these *hot keys* instead of having to use the mouse to select buttons. [Table 4.1 \(page 35\)](#) lists the hot keys available during interview stages.

Table 4.1. Onscreen buttons and their keyboard equivalents

Onscreen Button	Hot Key	Effect	Comments
Next	The + key on your keyboard	Displays next page of the stage	Don't press Shift . Works for all kinds of stages, but not on the last page of a stage.
Previous	The — key on your keyboard	Displays previous page of the stage	Don't press Shift . Works for all kinds of stages
Finish	The F key on your keyboard	Finishes the stage. The stage closes and you are returned to the Interview page.	Don't press Shift . Works for all kinds of stages, but only on the last page of a stage.
Administration	The A key on your keyboard	Displays the Administration dialog.	Don't press Shift. If a text field is selected (the focus is on the text field), this hot key will not work. This is so you will be able to enter the letter "a" in the text field.
First	The Home key on your keyboard	Jumps to the first page that needs your input. If no page requires your input, it	Only works in questionnaire stages

Onscreen Button	Hot Key	Effect	Comments
		jumps to the first page of the questionnaire.	
Last	The End key on your keyboard	Jumps to the last page that needs your input. If no page requires your input, it jumps to the last page of the questionnaire.	Only works in questionnaire stages
The X button in the corner of a dialog	The Esc key on your keyboard	Closes any dialog or small window that is displayed on top of a stage page.	Does not work on stage pages

Log

In the **Interview** page, a log contains a list of system messages and user comments. A log can either be about the interview as a whole, or about a particular stage of the interview. The list is in chronological order—the oldest entry is at the top, and the most recent entry is at the bottom.

Comment

In the **Interview** page, a comment list only contains comments added by users. Depending on which  button you select, the list of comments will either be about the interview as a whole, or about a particular stage of the interview. The list is in chronological order—the oldest entry is at the top, and the most recent entry is at the bottom.

The Interview Workflow



Due to Onyx's highly customizable nature, we cannot tell you which stages you will see when you enter the **Interview** page or the exact names of the [stage statuses \(page 31\)](#) and [stage actions \(page 31\)](#) that you will see, but we can tell you—more or less—what you will do each time you enter the **Interview** page.

Basic Workflow

The basic workflow of an interview is as follows:

A. Enter the Interview page. You enter the **Interview** page. You look at the list of stages and determine the next stage that must be done. Consent is usually the first stage. If it hasn't been obtained, you must obtain it.

B. Start a Stage. You start a stage. You would usually do the next stage that is "ready" and has a "start" action available for it.



Depending on how your study customized Onyx, an action window may be displayed when you select a stage action (start, pause, resume, and so on). If an action window is displayed, you must complete it to confirm your identity and the identity of the participant, and, in some cases, to enter a comment explaining why the action was necessary.

C. Work your Way through the Stage. When you are inside a stage, you follow the directions displayed onscreen to collect the data required for the stage. You step through the pages of the stage by selecting the **Next** and **Previous** buttons. If you need to [pause \(page 37\)](#) or [cancel \(page 38\)](#) the stage, you select the **Administration** button.

D. Finish the Stage. When you have completed all the pages of a stage, the **Finish** button is displayed. You select the **Finish** button. Depending on how your study customized Onyx, you may have to complete an **Action** dialog. After that, you can start working on another stage or you can exit the **Interview** page (for example, you may need to take a break or pass the interview over to another staff member).

E. Do all data-collecting stages. You would repeat B, C, and D for each stage.

F. Conclude the Interview. Studies usually define a conclusion stage. If your study defined a conclusion stage, you would do it after all data-collecting stages have been completed (or skipped if your study allows this for certain stages). You complete a conclusion stage in the usual fashion: start, next, next, next, finish. After, this all the stages will have the status "completed" (or "skipped"). The interview is closed. You cannot make any changes to the data.

G. Exit the Interview. You exit the **Interview** page in the usual way, by selecting either of the **Interview Exit** buttons.

Common Alternative Steps

Here are some alternative steps that you will probably use fairly often:

- **Pause the Stage.** If you need to pause a stage, you select the **Administration** button and then the **Pause** button in the **Administration** dialog. You will have to fill out an **Action** dialog again to confirm your identity and the participant's identity. After

that, you can exit the **Interview** page. Later, when you or another Onyx user wants to continue working on that stage, you re-enter the **Interview** page, and you will be able to resume the stage.

- **Exit the Interview.** If you leave a stage by pausing or finishing it. You can exit the **Interview** page, if necessary, by selecting either of the **Interview Exit** buttons. You will be able to re-enter the stage later, if you need to complete it or modify it.
- **Re-enter the Interview page of a participant.** You can always re-enter the **Interview** page of a participant immediately or afterward, by selecting the **Interview** action for the participant in the **Participants** page. You might want to do this in order to modify the data collected during a stage or to check how the interview went: were all stages completed, what were the user comments and system messages, how long a stage took, and so on.

Occasional Alternative Steps

Here are a few alternative steps that you may use occasionally:

- **Skip a Stage.** If you need to skip a stage (usually because of a technical problem like an instrument not being available for a physical measurement), you can select "skip" in the **Actions** column of the **Interview** page. You may or may not be able to complete the interview if it has skipped stages—it depends on how your study defined the conditions for completing the study.
- **Modify a Stage.** Occasionally, you may need to change a participant's answer to a question, or some other data collected during a stage. To do this, you modify the stage which opens the stage again. You can step through the pages of the stage and make the necessary changes.
- **Delete a Stage.** Occasionally, you may want to get rid of the data collected during a stage and start the stage over again. To do this, you delete the stage. Then you will be able to start it again.

Rare Alternative Steps

These are alternative steps that you will use rarely:

- **Cancel the Interview.** If the participant decides they don't want to be part of the study, you can withdraw them by cancelling the interview. In this case, you select the **Cancel** button in the **Interview** page. You will have to complete an **Action** dialog as usual. Your study will have decided what it wants to do with the data acquired up to the point of cancelling an interview. Follow the onscreen directions.

- **Close the Interview.** If the participant has done part of the interview, but must leave early for some reason, you can end the interview early, without actually withdrawing the participant. In this case, you select the **Close** button in the **Interview** page. You will complete an **Action** dialog. Your study will have decided whether it will keep or delete the data acquired up to this point. Follow the onscreen directions.
- **Reinstate the Interview.** If by mistake you cancel or close the interview, you can restore the interview to its earlier state by selecting the **Reinstate** button in the **Interview** page. See [Figure 4.5 \(page 39\)](#)

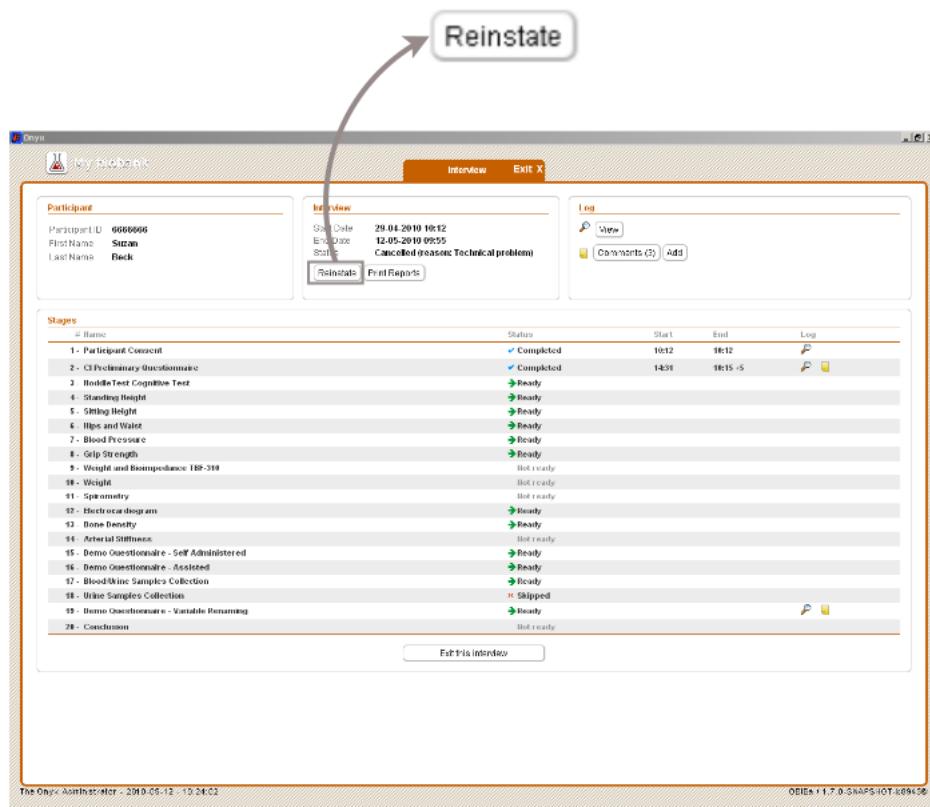


Figure 4.5. To reinstate a cancelled or closed interview, select Reinstate in the Interview page

Routine Procedures at the Interview Level

These are procedures that relate to the interview as a whole:

- [Entering the Interview page \(page 40\)](#)
- [Exiting the Interview page \(page 40\)](#)
- [Concluding the interview normally \(page 41\)](#)

- Printing reports for the participant (page 41)
- Adding comments at the interview level (page 42)
- Viewing comments at the interview level (page 44)
- Viewing the log for the entire interview (page 44)



Entering the Interview Page

After a participant is received or enrolled, you can enter their **Interview** page as explained below. If you exit the **Interview** page, you can also reopen it in the same way.

Procedure

1. Find the participant you want to interview. See [Finding a Participant \(page 23\)](#) if you need help locating the participant. The participant should be displayed in the **Participants** page.
2. Select the participant's **Interview** link. The **Interview** page is displayed. You can now start any stage whose status is **Ready**.



Exiting the Interview Page

As explained earlier in this chapter (see [Exit buttons \(page 29\)](#)), you may need to exit the **Interview** window for any number of reasons. Exiting the **Interview** page does not stop the interview prematurely or withdraw the participant from the study. You and other Onyx users will be able to come back into the **Interview** page later. If the interview was not already completed, you will be able to continue it.

Procedure

1. If you are in the middle of an interview stage, pause it as explained in [Pausing a Stage \(page 47\)](#). The **Interview** page should be displayed.

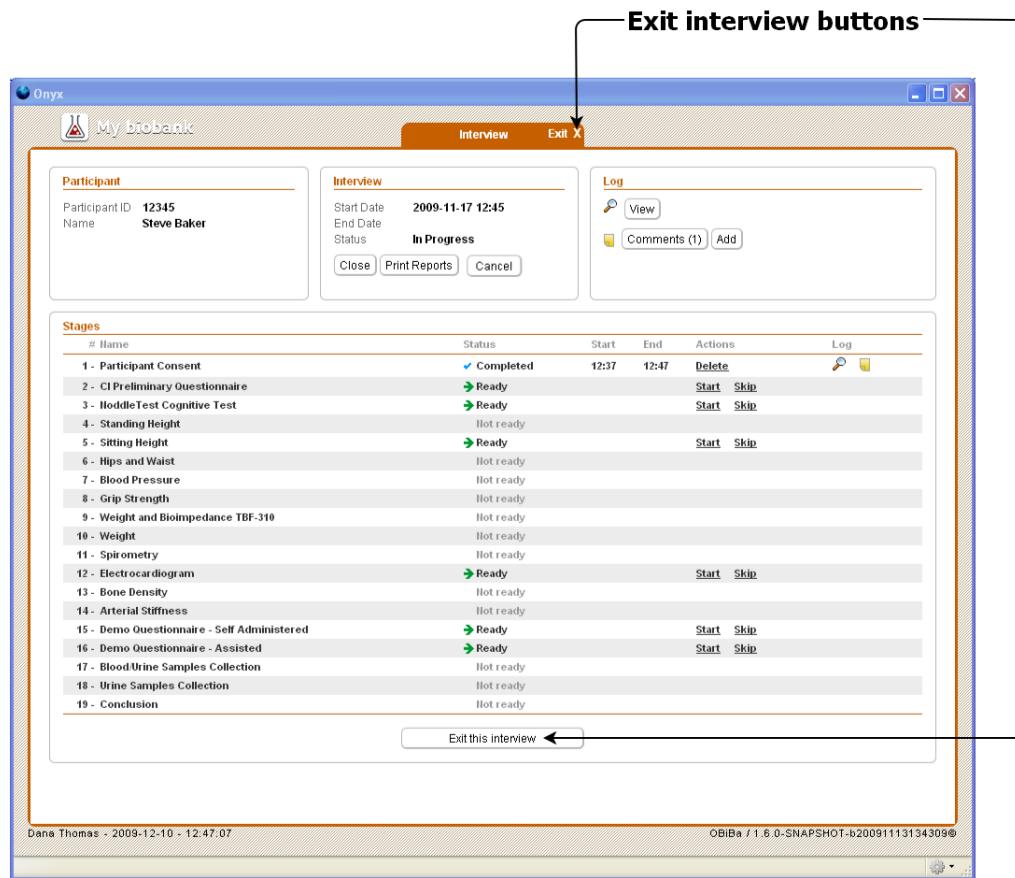


Figure 4.6. Closing the Interview page with either of its Exit buttons is the correct way to exit the Interview page

2. Select either of the interview **Exit** buttons in the **Interview** page (but not the X button in the upper right corner of the window). See [Figure 4.1 \(page 29\)](#) The **Interview** page closes and the **Participants** page is displayed.



Concluding the Interview Normally

When all the stages of a study have been completed (or skipped if your study allows skipping of certain stages), the interview is finished. You can print reports for the participants, if your study has defined any. See [Printing reports \(page 41\)](#).



Printing Reports for Participants



Your study may have defined some reports that you can print and give to the participant for their information. You can print the report for a certain stage any time after the stage is complete.

Prerequisites

- A printer must be set up and ready for use from your workstation. If you have questions about the printer setup, speak to your system administrator.
- The participant's **Interview** page must be displayed. See [Entering the Interview Page \(page 40\)](#).

Procedure

1. Select the **Print Report(s)** button. The **Report** dialog is displayed. If the consent form is not available for printing, the participant may have signed a manual consent form.
2. Check the report(s) you wish to print, choose a language for each report, and select the **Print Reports** button.
3. If a **Compose Fax** dialog is displayed, select the **Exit** button.
4. When a dialog informs you that the reports have been sent to the printer, close the dialog. The **Interview** page is visible again.
5. Collect the reports from the printer.



Adding Comments about the Interview

When you are in the **Interview** page, you can add comments about the interview as a whole. The comments are added to the interview log (which also includes system messages) and to the comments list for the interview (which also includes comments about individual stages that are collected from the various [action windows \(page 33\)](#) that are displayed during the course of the interview). See [Figure 4.7 \(page 43\)](#)

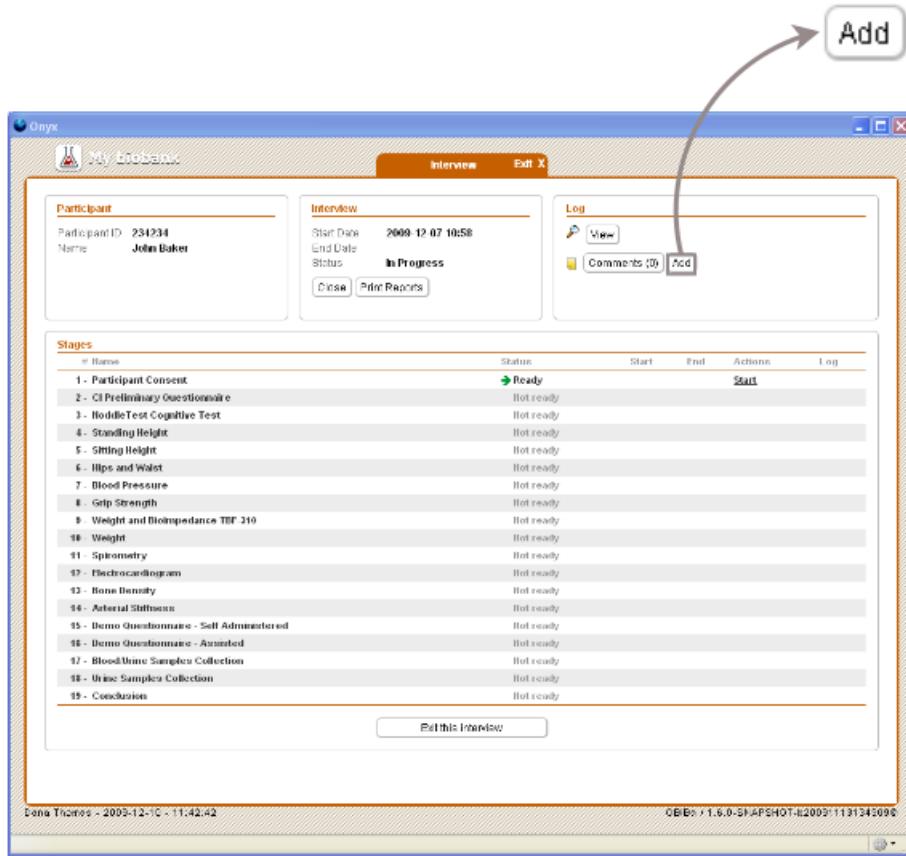


Figure 4.7. To add a comment about the interview as a whole, select Add in the Log section of the Interview page

Prerequisites

The participant's **Interview** page must be displayed. See [Entering the Interview Page \(page 40\)](#).

Procedure

1. Select the **Add** button in the **Log** section of the **Interview** page. A dialog is displayed.
2. Enter your comment in the dialog box.
3. If you decide you do not want to save the comment, select **Cancel**. The dialog closes and the **Interview** page is visible again.
4. If you want to save the comment, select **Save**. The dialog closes and the **Interview** page is visible again.

5. If you want to check that your comment was added, select the **Comments** button in the **Log** section of the **Interview** page. A **Log** window is displayed. It lists the comments on the interview, including the one you just entered.
6. When you have finished viewing the log, select the **Close** button. The **Log** window closes and the **Interview** page is visible again.



Viewing All User Comments about the Interview

You can view a list of all the comments made by users during the interview. Some comments come from the action dialogs about individual stages of the interview. Some of the comments may have been entered in the **Interview** page.

Prerequisites

The participant's **Interview** page must be displayed. See [Entering the Interview Page \(page 40\)](#).

Procedure

1. Select the **Comments** button in the **Log** section of the **Interview** page. A **Log** window is displayed.
2. View the comments and, if you want to add another one, select **Add**. See [Adding Comments \(page 42\)](#).
3. When you have finished viewing the comments, select **Close** in the **Log** page. The dialog closes and the **Interview** page is visible again.



Viewing the Interview Log

You can view a log of all the user comments and system messages for the entire interview. The user comments can come from the action dialogs about individual stages of the interview. or may have been entered in the **Interview** page. The system messages are mostly about actions taken during the different stages of the interview, but may also be about errors.

Prerequisites

The participant's **Interview** page must be displayed. See [Entering the Interview Page \(page 40\)](#).

Procedure

1. Select the **View** button in the **Log** section of the **Interview** page. A **Log** window is displayed.
2. View the log. You will see:
 - User comments — Indicated by a  icon and the word **Comment** in the **Action** column.
 - System messages — Indicated by an action (**Start**, **Finish**, and so on) in the **Action** column. The system generates a message whenever a user carries out an action in the **Interview** page. The system also generates messages if an error occurs.
3. If you want to add a comment, select the **Add** button. See [Adding Comments \(page 42\)](#).
4. When you've finished viewing the log, select **Close** in the **Log** page. The dialog is closed and the **Interview** page is visible again.

Routine Procedures at the Stage Level

Routine procedures at the Stage Level (used during an interview stage—you initiate them from the Administration dialog)

- Starting a stage (page 46)
- Pausing a stage (page 47)
- Resuming a stage (that was paused) (page 47)
- Cancelling a stage (page 48)
- Finishing a stage (page 46)
- Skipping a stage (page 49)
- Reinstating a stage (that was skipped) (page 49)
- Modifying a stage (that was already completed) (page 50)
- Deleting a stage (that was already completed) (page 51)
- Viewing the log for a stage (page 52)
- Viewing comments about a stage (page 51)



Starting a Stage

You can start any stage whose status is **Ready** and which has a **Start** link in the **Actions** column. See [Figure 4.8 \(page 46\)](#) To avoid problems, it is recommended that you do the stages in the order they appear in the list.

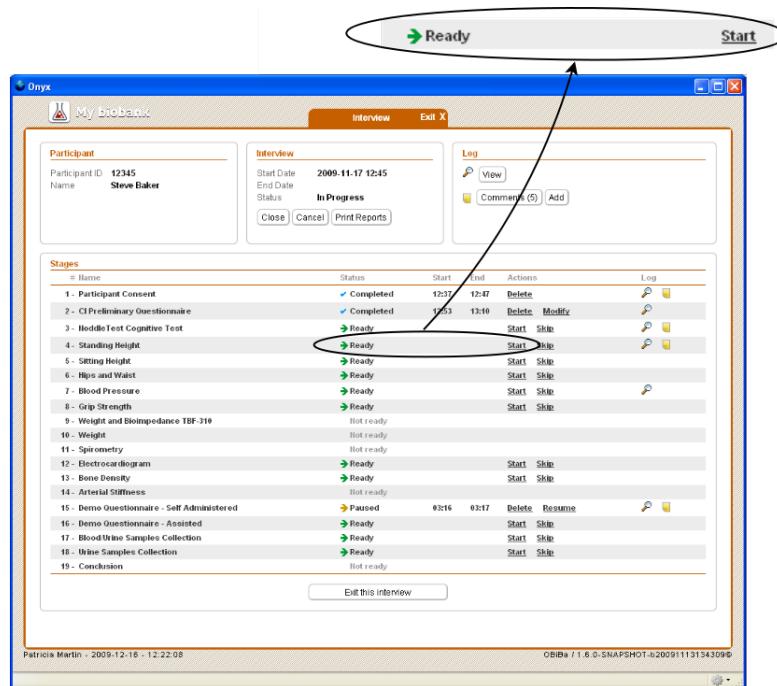


Figure 4.8. You can start any stage with a Ready status and a Start action

Procedure

1. Select the stage's **Start** link.
2. If an action window for starting the stage is displayed, complete it. The action window closes and the stage window is displayed.
3. Complete the stage windows following the on-screen directions.



Finishing a Stage

When you are at the end of a stage, the **Finish** button is displayed in the lower right corner of the page.

Procedure

1. Select the **Finish** button.

2. If an action window for finishing the stage is displayed, complete it. The action window closes.

The **Interview** page is displayed. The status of the stage is now **Completed**. You can start another stage if there are any left to complete.



Pausing a Stage

When you are in the middle of a stage, you may need to pause the stage. You can do so when the **Administration** button is displayed in the lower left corner of the stage window. Afterwards, you (or another Onyx user) will be able to resume the stage. If the stage is a questionnaire, the questionnaire will resume after the last completed question.

Procedure

1. Select the **Administration** button. The **Administration** dialog is displayed. It includes a **Pause** button.
2. Select the **Pause** button.
3. If an action window for pausing the stage is displayed, complete it. The action window closes.

When the **Interview** page is displayed again, you can start another stage if any more need to be completed.



Resuming a Stage

If you (or another Onyx user) paused a stage, you can continue the stage as explained in this section. If the stage was a questionnaire, the questionnaire will resume after the last completed question.

Procedure

1. If you are not in the **Interview** page for the participant whose interview you want to resume, you may need to do some or all of the following to get there:
 - If your Onyx session expired, you must log in again. See [Logging In. \(page 10\)](#)
 - If necessary, find the participant in the most convenient way for you. See [Finding a Participant \(page 23\)](#).

- If the participant is listed in the **Participants** page, select their **Interview** link.
2. When you are in the participant's **Interview** page, select the **Resume** action for the stage that you wish to resume.
 3. If an action window for resuming the stage is displayed, complete it. The action window closes.
 4. When the stage page is displayed, you continue the stage where it had been paused. You can use hot keys to move through the pages more quickly. See [Hot Keys \(page 35\)](#).



Cancelling a Stage

After you start a stage, you may decide not to proceed with it at the current time. When you are in the middle of the stage pages, you can cancel the stage as explained in this section.

Procedure

1. Select the **Administration** button. The **Administration** dialog is displayed. Depending on the type of stage, the dialog will include a button labelled **Cancel Questionnaire** or **Cancel Measurement** or **Cancel Sample Collection**.

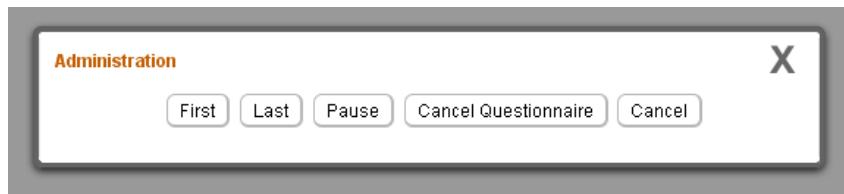


Figure 4.9. When you want to cancel a stage, you select the Administration dialog

2. Select the appropriate cancel button (**Cancel Questionnaire** or **Cancel Measurement** or **Cancel Sample Collection**). Do not select the button labelled just **Cancel**—it just closes the **Administration** dialog and puts you back in the stage.
3. If a dialog prompts you to confirm that you want to cancel the stage, select **Yes**.
4. If an action window for cancelling the stage is displayed, complete it. The action window closes.

When the **Interview** page is displayed again, you can restart the stage or start another stage.



Skippping a Stage

If you need to skip a stage, you can do so as explained in this section. If the stage you are skipping turns out to be necessary for another stage, you will find out when you start the other stage.

Prerequisites

- The correct participant's **Interview** page must be displayed. See [Entering the Interview Page \(page 40\)](#).
- The **Skip** action is available for the stage you wish to skip.

Procedure

1. Select the **Skip** action.
2. If an action window for skipping the stage is displayed, complete it. The action window closes.

When the **Interview** page is displayed again, you can start another stage if any more need to be completed.



Reinstating a Stage

If you (or another Onyx user) skipped a stage, you can reinstate it as explained in this section. Reinstating a stage means restoring it to the **Ready** status so it can be started again.

Prerequisites

- Ensure that any problems have been resolved. Read the user comments or the log for the stage to find out why it was skipped (see [Viewing Logs and Comments for a Stage \(page 44\)](#)).
- The correct participant's **Interview** page must be displayed. See [Entering the Interview Page \(page 40\)](#).
- The **Reinstate** action is available for the stage you wish to skip.

Procedure

1. Select the **Reinstate** action for the stage you wish to reinstate.

2. If an action window for reinstating the stage is displayed, complete it. The action window closes.
3. When the **Interview** page is displayed again, you can start another stage or restart the same stage immediately, if you wish.



Modifying a Stage

You may need to reopen a stage that was already completed in order to change the data that was saved for it. For example, you may need to correct an answer in a questionnaire stage or redo a measurement in a physical measurement stage. If you need to reopen a stage in order to change some of the data stored for it, you can do so as explained in this section. After you make the changes, the stage's status will become **Completed** again.

If the stage is a long one, it is better to modify the stage rather than deleting it and starting it over from scratch (compare with [Deleting a Stage \(page 51\)](#)).

The consent stage cannot be modified. If you need to change it in some way, you must delete it and start it over again. See [Deleting a Stage \(page 51\)](#).

Prerequisites

- The correct participant's **Interview** page is displayed. See [Entering the Interview Page \(page 40\)](#).
- The **Status** of the stage you wish to delete is **Completed**.
- The **Modify** action is available for the stage.

Procedure

1. Select the **Modify** action for the stage you wish to modify.
2. If an action window for modifying the stage is displayed, complete it. The action window closes.
3. When the stage opens, it shows all data that was stored previously. Step through the stage page(s) and make any changes that are necessary. You can use hot keys to move through the pages more quickly. See [Hot Keys \(page 35\)](#).
4. When you arrive at the last page of the stage, select the **Finish** button.
5. If an action window for finishing the stage is displayed, complete it. The action window is closed.

When the **Interview** page is displayed again, you can start another stage if any more need to be completed.



Deleting a Stage

You may need to redo a stage that was already completed. If you need to start a stage over from scratch, you can delete the stage as explained in this section. After deleting the stage, you will be able to restart it.

Prerequisites

- The correct participant's **Interview** page is displayed. See [Entering the Interview Page \(page 40\)](#).
- The **Status** of the stage you wish to delete is **Completed**.
- The **Delete** action is available for the stage.

Procedure

1. Select the **Delete** action for the stage you wish to delete (and later restart).
2. If an action window for deleting the stage is displayed, complete it. The action window closes.
3. When the **Interview** page is displayed again, you can start another stage or restart the same stage immediately, if you wish



Viewing Comments about a Stage of the Interview

Prerequisites

The participant's **Interview** page must be displayed. See [Entering the Interview Page \(page 40\)](#).

Procedure

1. Select the  icon at the right end of the line for the stage. A **Log** window listing all user comments about the stage is displayed.

2. View the user comments and, if you'd like to view user comments for the entire interview, select the **Show All** button.
3. Select **Close** in the **Log** window. The window closes and the **Interview** page is visible again.



Viewing the Log about a Stage of the Interview

Prerequisites

The participant's **Interview** page must be displayed. See [Entering the Interview Page \(page 40\)](#).

Procedure

1. Select the  icon at the right end of the line for the stage. A **Log** window listing all system messages about the stage is displayed.
2. View the system messages. If you'd like to view the user comments and system messages for the entire interview, select the **Show All** button.
3. When you have finished viewing the log, select **Close** in the **Log** window. The window closes and the **Interview** page is visible again.

Procedures for Exceptional Situations

Occasionally, you may need to handle an unusual situation such as a participant withdrawing from the study or leaving before the interview is complete. This section includes the procedures for these situations:

- [Cancelling the interview \(withdrawing the participant\) \(page 52\)](#)
- [Closing the interview \(ending the interview before completion\) \(page 54\)](#)



Cancelling the Interview (withdrawing the participant)

If you need to cancel the interview and withdraw the participant from the study, you select the **Cancel** button in the **Interview** page. See [Figure 4.10 \(page 53\)](#)

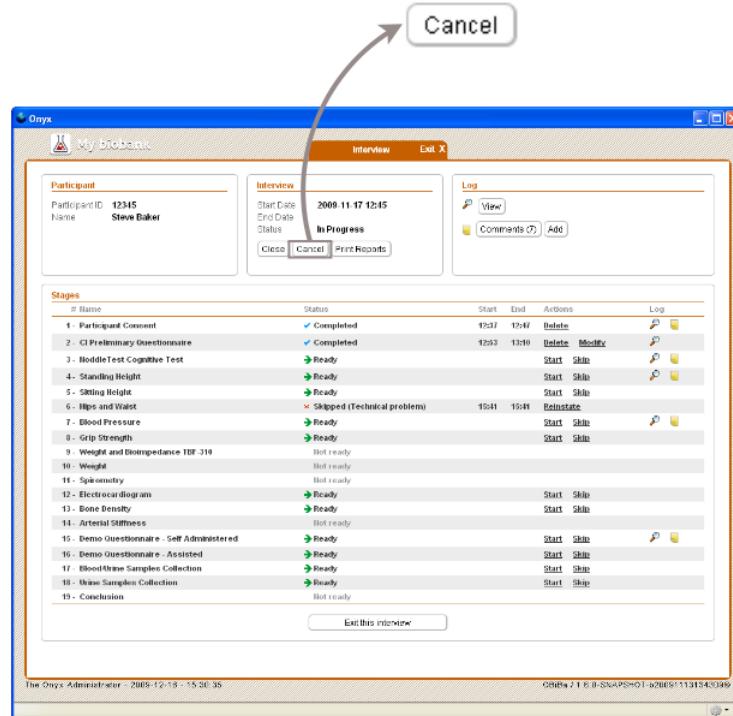


Figure 4.10. To withdraw the participant, select **Cancel** in the Interview page

Prerequisites

The participant's **Interview** page must be displayed. See [Entering the Interview Page \(page 40\)](#).

Procedure

1. Select the **Cancel** button. A dialog is displayed. It warns you that the participant will be withdrawn from the study and asks you to confirm that you want to cancel the interview.
2. If you decide you do not want to cancel the interview, select **No**. The dialog closes and the **Interview** page is visible again.
3. If you want to go ahead and cancel the interview, select **Yes**. The dialog closes.
4. If an action window for cancelling the interview is displayed, complete it. The action window closes.

When the **Interview** page is displayed again, you will notice that the status of the interview is now **Cancelled**. You will not be able to start any stages. You can view logs and comments. When you exit the **Interview** page, you will be enter it again, but only to view the status of the various stages.



Closing the Interview (before completion)

If you need to end an interview early (before all stages are complete), and do not need to withdraw the participant from the study, you select the **Close** button in the **Interview** page. See [Figure 4.11 \(page 54\)](#)

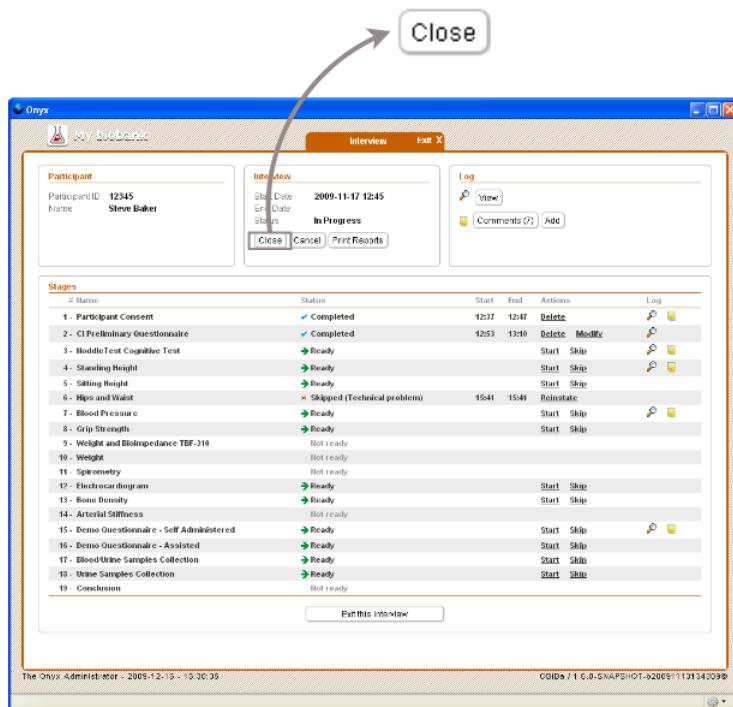


Figure 4.11. To end an interview early without withdrawing the participant, select Close in the Interview page

Prerequisites

The participant's **Interview** page must be displayed. See [Entering the Interview Page \(page 40\)](#).

Procedure

1. Select the **Close** button. A dialog is displayed. It warns you that you will not be able to continue the interview and asks you to confirm that you want to close the interview.
2. If you decide you do not want to close the interview, select **No**. The dialog closes and the **Interview** page is visible again.
3. If you want to go ahead and close the interview, select **Yes**. The dialog closes.

4. If an action window for closing the interview is displayed, complete it. The action window closes.

When the **Interview** page is displayed again, you will notice that the status of the interview is now **Closed**. You will not be able to start any stages. You can view logs and comments. When you exit the **Interview** page, you will be enter it again, but only to view the status of the various stages.

Chapter 5. Obtaining Participant Consent

For most studies, the first stage of an interview with a participant is a consent stage. During the consent stage, two things must happen: the participant must read and sign a consent form (or the participant may refuse to sign the form), and their consent (or refusal to consent) must be registered in Onyx. Onyx allows studies to obtain and register consent in two ways: manually (using a paper form) and electronically (using an on-screen form and an electronic signature pad).

In Onyx, obtaining consent is a stage of the participant interview and can be controlled in the same way as other stages. The general procedures for controlling an interview stage apply to the consent stage—see [Chapter 4 \(page 28\)](#).



All Onyx interview stages, including the consent stage, are highly customizable. Each study writes the content of its consent form, and decides in which ways the participant will be allowed to read and sign the consent form.

This chapter covers the following topics:

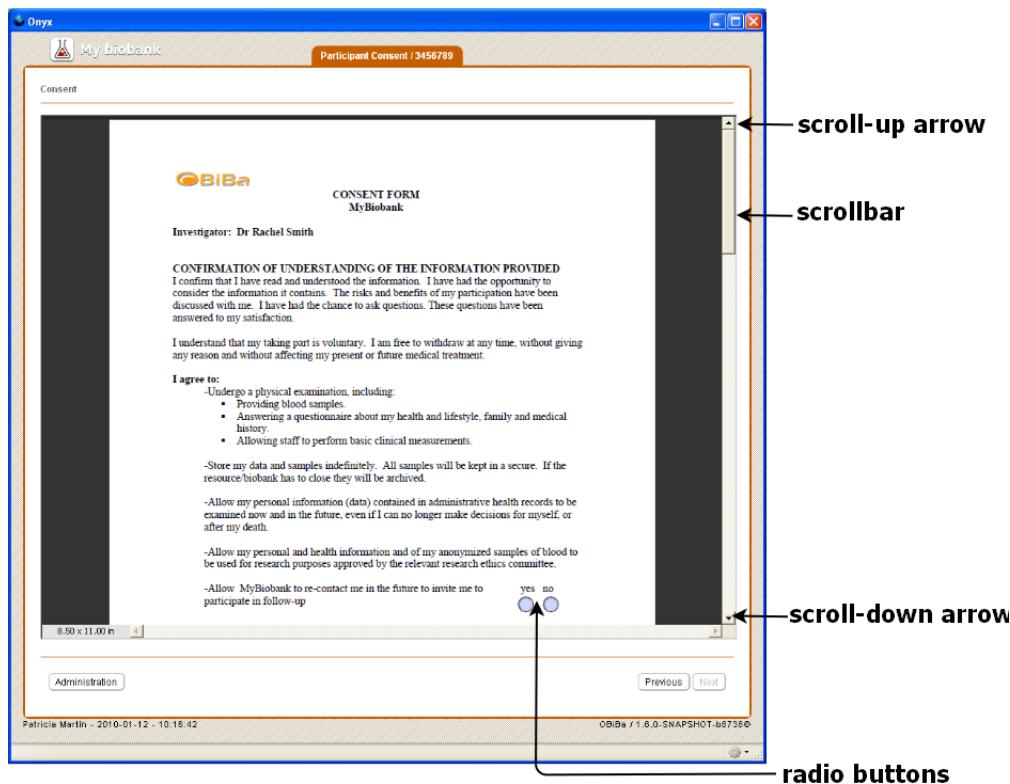
- An electronic consent form and its important features
- Key concepts related to obtaining consent
- Procedures used to obtain consent

Electronic Consent Forms

In Onyx, an electronic consent form is a file in PDF format (Portable Document Format). An electronic consent form contains the text that was defined by the study and that the participant must agree to in order to participate. The form is displayed on-screen during the consent stage so that the participant can read and sign it. The example in [Figure 5.1 \(page 57\)](#) shows some of the features of electronic consent forms. A consent form can contain buttons that click or check to select options and fields that you must click in and complete. PDF files have many display options that you can access by clicking on the consent form with the right mouse button. For some pointers, see [Tips for Viewing an Electronic Consent Form \(page 58\)](#).

Obtaining Participant Consent

Initially, you see the top of the consent form...



When you scroll down, you see more of the consent form

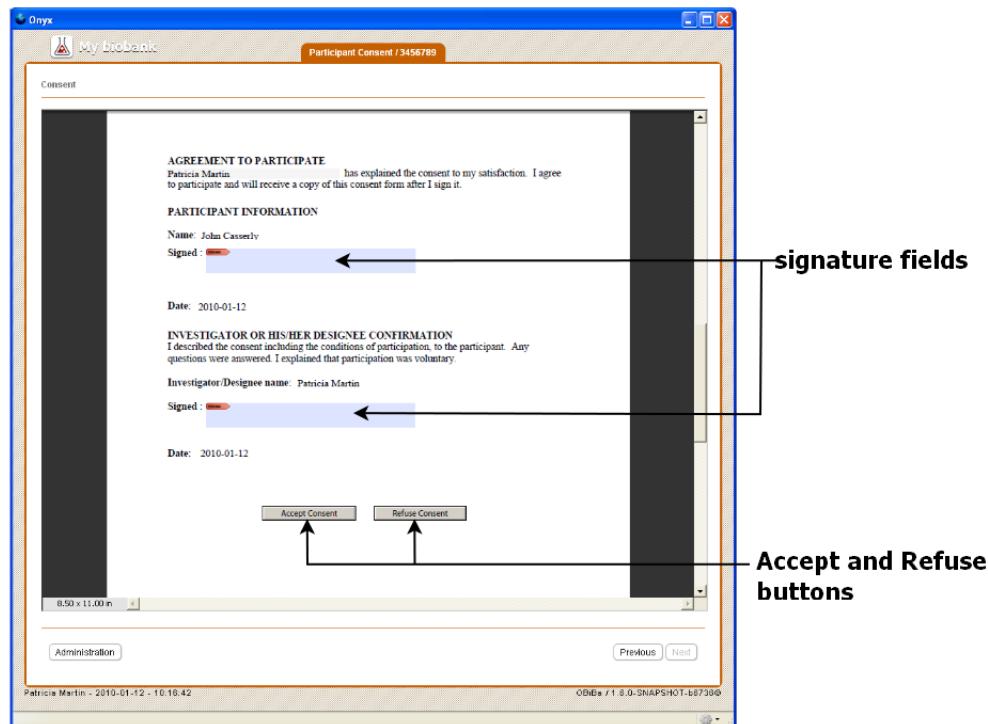


Figure 5.1. An electronic consent form may contain several pages

Key Concepts

This section contains key concepts related to obtaining participant consent.



Manual vs. Electronic Consent



Studies can customize how consent is obtained:

- Electronic Consent — The participant reads the consent form on the workstation screen, then signs on an electronic signature pad, and the electronic signature is stored on the electronic consent form.
- Paper Consent — The participant reads and signs a paper consent form, and a staff member makes a selection in Onyx that indicates that the participant signed a paper consent form.
- A study can customize Onyx to accept consent both electronically and manually

Studies customize the text in the consent form and the name of the consent stage in Onyx.



Electronic Signature Pad

An electronic device used to capture an electronic signature. See [Figure 5.2 \(page 58\)](#). An electronic signature is any legally recognized electronic means that indicates that a person agrees to the contents of an electronic message. In this case, the electronic message is an electronic consent form.



Figure 5.2. An electronic signature pad



Pointers for Viewing an Electronic Consent Form

Before you do an electronic consent stage with a participant, try out the following techniques for viewing and completing the form:

If the form is too large to be displayed all at once:

Use the scrollbar and scroll arrows to move around the consent form. They are located to the right of the form—see [Figure 5.1 \(page 57\)](#).

- To move down through the form, click the scroll-down arrow one or more times.
- To move up through the form, click the scroll-up arrow one or more times.
- To move up and through the form, click and drag on the scrollbar.

If the text is too large or too small:

- To make the text bigger, press and hold the **Ctrl** key and click the + key (the plus key) once or several times.
- To make the text smaller, press the **Ctrl** key and click the - key (the minus key) once or several times.

If you want to reset the form (to its original size and with all fields cleared):

- Click the **Previous** button and then the **Next** button.

Procedures

This section contains procedures used to obtain participant consent.



Obtaining Consent Manually



If your study uses paper consent forms (or if it allows both paper and electronic consent forms), there will be a consent stage in your version of Onyx. This section explains how to record the result of the paper consent process in Onyx.

Prerequisites

- Instruct the participant to read through the form and to sign it when they are ready.
- While the participant is reading the form, ensure that the participant's **Interview** page is displayed. See [Entering the Interview Page \(page 40\)](#).
- Check that the **Status** of the consent stage is **Ready**.

Procedure

You can start this procedure while the participant is reading the consent form so that you are ready to register whether or not they signed the consent form when they have finished reading.

1. Select the **Start** link for the consent stage. An action window for starting the consent stage may be displayed.
2. If an action window is displayed, complete it. The action window closes and the stage window is displayed.
3. Enter your password, scan the participant's barcode (or enter their Participant ID manually) and select the **Continue** button.
4. If your study accepts electronic and paper consents, you will be prompted to select one or the other for the current participant. See [Figure 5.3 \(page 60\)](#) Select paper consent.

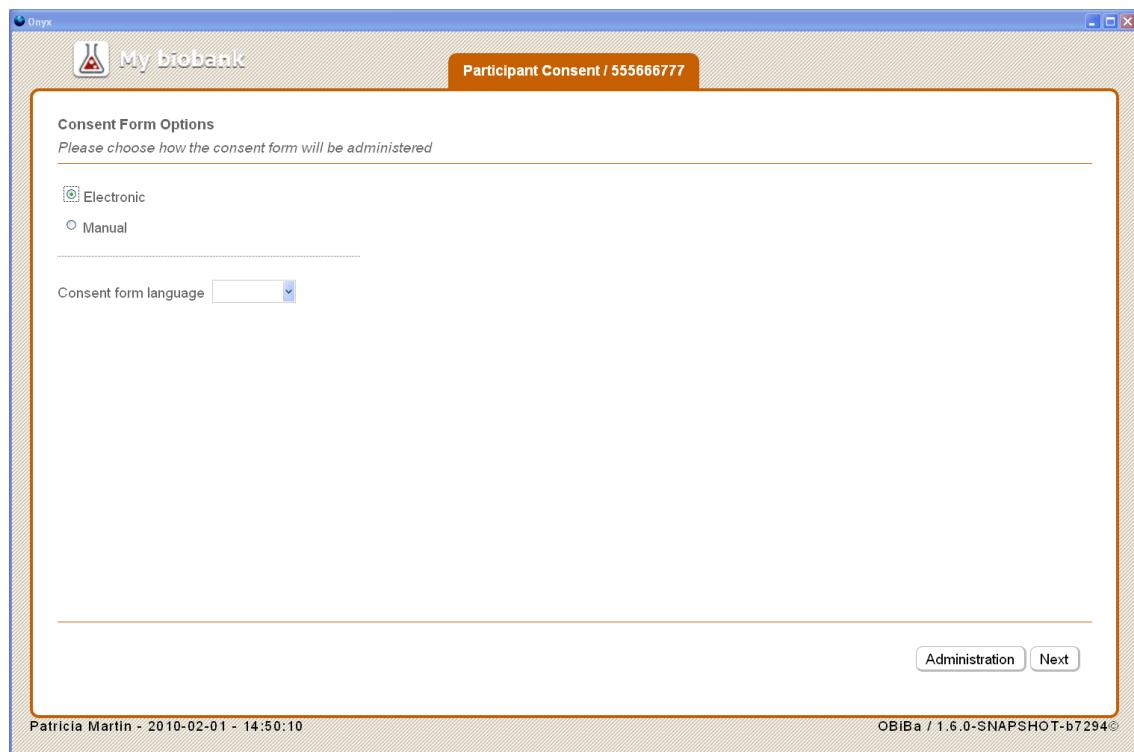


Figure 5.3. If your study accepts consent in electronic and manual format, you will be prompted to select a format

5. Select the language of the form given to the participant.
6. When Onyx prompts you to select whether or not the participant has read and signed the consent, check if the participant has signed the consent form and select the appropriate response in Onyx.

7. When you have responded to all questions, select the **Administration** button. The **Administration** dialog is displayed
8. Select the **Finish** button. An action window for finishing the consent stage is displayed.
9. Scan or enter the Participant ID manually, then select the **Continue** in the action window. The action window closes and the **Interview** window is visible again.



Obtaining Consent Electronically



If your study records consent electronically (or if it accepts both electronic and paper consent), there will be a consent stage in your version of Onyx. You obtain consent electronically as explained in this section.

Prerequisites

- An [electronic signature pad \(page 58\)](#) must be connected to the Onyx workstation.
- Ensure that the participant's **Interview** page is displayed. See [Entering the Interview Page \(page 40\)](#).
- Check that the **Status** of the consent stage is **Ready**.

Procedure

1. Select the **Start** link for the consent stage. An action window for starting the consent stage may be displayed.
2. If an action window is displayed, complete it. The action window closes and the stage window is displayed.
3. Enter your password, scan the participant's barcode (or enter their Participant ID manually) and select the **Continue** button.
4. If your study accepts electronic and paper consents, you will be prompted to select one or the other for the current participant. See [Figure 5.3 \(page 60\)](#) Select electronic consent, and follow the rest of the on-screen directions.

If your study is set up for electronic consent, the forms you will see on-screen will be similar to those shown in [Figure 5.4 \(page 62\)](#).

Obtaining Participant Consent

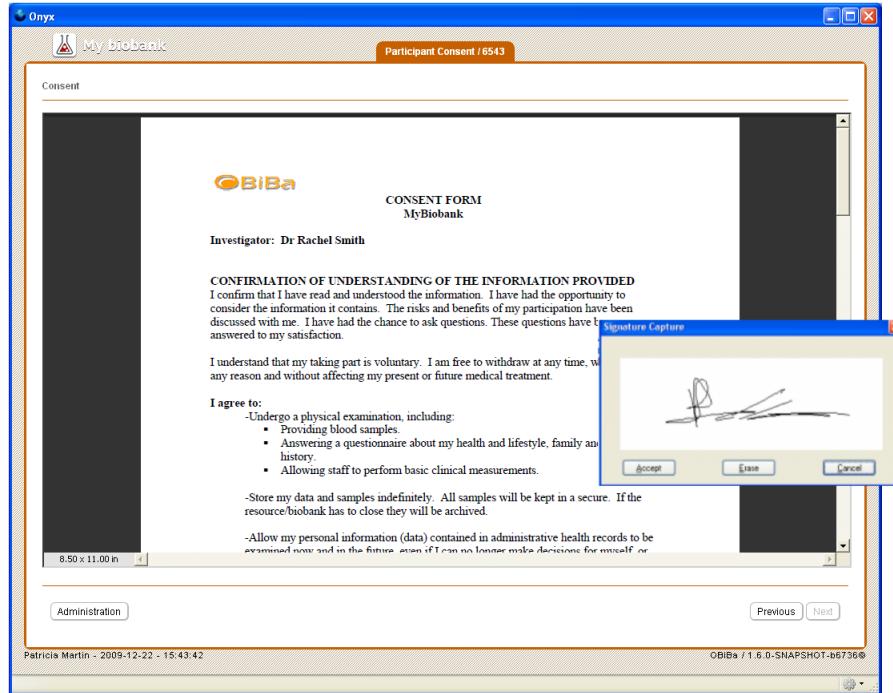


Figure 5.4. Example of an electronic consent form

5. Since the participant is completing the form on-screen, go over the following points:
 - Show them how to scroll up and down through the form, and adjust the text size if necessary. See [Tips for Viewing an Electronic Consent Form \(page 58\)](#).
 - Point out any buttons or fields where the participant must make a selection or an entry.
 - Advise them to read the form carefully and ask them to tell you when they are ready to sign it.
6. When the participant is ready to sign the form, show the participant how to use the electronic signature pad (if you have to co-sign the form, you can demonstrate by signing your name in the field provided):
 - Using the mouse, click in the signature field in the onscreen form.
 - Use the stylus (attached to the signature pad) to sign your name in the window on the signature pad. As you write, the signature is displayed simultaneously on the signature pad and on the screen of the Onyx workstation.
 - If the signature is well done, use the mouse to click **Accept** on the Onyx screen. If you don't select **Accept** within a few seconds, the signature will be cleared and you will have to sign again.

- When you are ready, select the **Accept** button at the bottom of the consent form.
7. Ask the participant to sign on the signature pad.
 8. Ensure the participant has responded to any remaining questions on-screen.
 9. If there is an **Accept** button, ask the participant to select it. An Action window may be displayed next—if so, go to [Step 13 \(page 63\)](#).
 10. If the **Administration** button is displayed in the lower left corner of the page, select it. The **Administration** dialog is displayed.
 11. If you don't want to complete the stage now, select the **Cancel Consent** button. An action window for cancelling consent is displayed.
 12. If you want to complete the stage now, select the **Finish** button. An action window for finishing the consent stage is displayed.
 13. Scan or enter the Participant ID manually, then select the **Continue** or **Cancel** button in the action window. The action window closes and the **Interview** window is visible again.

Chapter 6. Completing Questionnaires

Questionnaires are an important component of participant interviews. An interview can include several questionnaires. In Onyx, each questionnaire is considered a stage of the participant interview, so the general procedures for controlling an interview stage (see [Chapter 4 \(page 28\)](#)) apply to questionnaire stages.



Questionnaires are highly customizable. Each study creates its own questionnaires from scratch and writes the directions to staff members that appear in the questionnaire.

Since your study has defined its own questionnaire stages, this guide cannot give you advice about how to answer particular questions in your study's questionnaire(s). Instead, this chapter covers the types of questions you will see in your questionnaires and gives you pointers about working on questionnaires in Onyx. Example questions are taken from an example Onyx web application. In particular, this chapter covers these topics:

- [Key concepts related to questionnaires \(page 64\)](#)
- [Pointers for completing assisted questionnaires with participants \(page 66\)](#)
- [Example questions from assisted questionnaires \(page 67\)](#)
- [Example questions from self-administered questionnaires \(page 73\)](#)

Key Concepts



Touchscreen vs. Regular Screen

Onyx can display questionnaires on two different types of screen:

- **Touchscreen.** A touchscreen is a screen that allows you to select buttons by touching them on the screen with your finger. Your finger takes the place of the mouse on a regular screen. See [Figure 6.1 \(page 65\)](#) Usually, a keyboard is not used with a touchscreen. If an Onyx questionnaire is configured for display on a touchscreen:

- The buttons are larger (so they're easier to point at with a finger).
- The questions are often multiple-choice (so you don't need a keyboard to enter an answer).
- If you have to enter a number, a number pad is displayed on the touchscreen.

Touchscreen display mode is especially suitable for [self-administered questionnaires \(page 65\)](#). The recommended resolution to use for a touchscreen is 1024 x 768.

- **Regular Screen.** By a regular screen, we mean the kind of screen used with most desktop computers and the screens of laptop computers. You select onscreen objects with a mouse (or a touchpad on a laptop). If an Onyx questionnaire is configured for display on a regular screen, the buttons are usually smaller than in touchscreen mode, and number pads are not displayed since a keyboard is available.

Regular display mode is used for assisted questionnaires for [assisted questionnaires \(page 66\)](#).

The screenshot shows a questionnaire titled "3) Which face best matches your freckling?". At the top, there is a header with the logo "My Biobank", the title "Demo Questionnaire - Self Administered / 1234567", and a "Administration" button. Below the header, the question is displayed: "Please choose the appropriate face". Five faces are shown in a row, with the third face highlighted in orange. Below the faces are two buttons: "Prefer not to answer" and "Don't know". At the bottom of the screen, there are navigation arrows labeled "Previous" and "Next", a progress bar indicating "5% completed", and the text "The Onyx Administrator - 2009-09-24 - 11:47:35" and "OBiBa / 1.6.0-SNAPSHOT-b20090923102635©".

Figure 6.1. Example of a questionnaire displayed on a touchscreen

👉 Self-administered Questionnaires

A self-administered questionnaire is a questionnaire that the participant answers on their own, rather than being interviewed by a member of the study team. The questionnaire is usually displayed on a touchscreen. The participant answers the question by touching the appropriate answer on the touchscreen.

 **Assisted Questionnaires**

An assisted questionnaire is that an interviewer *assists* the participant with. The interviewer sits with the participant, asks the questions that appear on the workstation screen, and enters the participant's answers in Onyx. The questionnaire is usually displayed on a regular workstation with a keyboard available. See [Example Questions from Assisted Questionnaires \(page 67\)](#).

 **Contraindication Questionnaires**

Questionnaires can be used to establish whether a physical measurement or biospecimen stage is contraindicated. Contraindication questionnaires would typically be one of the earlier stages in the interview and, of course, have to be done before the stages that may subsequently be contraindicated. Contraindication questionnaires are just like any other questionnaire stage. You control them in the same way and answer the questions in the same way.

 **Answer Validation**

Studies can validate the answers you enter in text fields. For example, if you have to enter a number such as the participant's age, Onyx may validate if it is in a certain range. If an answer you enter does not pass validation, you will see an error message that will usually give you some indication of how to correct the error.



Pointers for Completing Assisted Questionnaires

This section gives some general pointers for completing assisted questionnaires with participants—the type that you read to the participant and enter their answers for them. Before reading these pointers, you should experiment with the assisted questionnaires that are part of your study. You can also look at the [Example Questions from Assisted Questionnaires \(page 67\)](#) section of this chapter.

- Here are some keyboard shortcuts that you can use in any page of Onyx—including questionnaires:
 - To increase the font size of text: Press **Ctrl** and + keys.
 - To decrease the font size of text: Press the **Ctrl** and - keys.
 - To jump forward between fields and/or buttons: Press the **Tab** key.
 - To jump backward between fields and/or buttons: Press the **Shift** and **Tab** keys.

- Always read the question clearly to the participant and let them know if they will be able to select just one answer or several answers.
- If the answers are preceded by round buttons , the participant can only choose one answer. See [Figure 6.2 \(page 68\)](#):
- If the answers are preceded by square checkboxes , the participant can choose several answers. See [Figure 6.3 \(page 69\)](#).
- If the answer includes a drop-down list , you click and hold on the arrow to read the list of options, and then release on the participant's answer.
- If the answer includes a text box  Other condition , the participant may or may not have to supply an answer—depending on how your study defined it. For example, they might need to tell you about a condition they have that was not among the options they could choose from. One or more alternative answers are usually provided, in case the participant cannot or does not want to provide the particular bit of information that you would usually enter in the text box.
- You can use the **Next** and **Previous** buttons to go to the next page of a questionnaire or to return to the previous page of a questionnaire. See [Figure 6.4 \(page 70\)](#).
- You can also use hot keys to go forward and back through the pages of the questionnaire. See [Hot Keys \(page 35\)](#).
- With practice, you will learn how quickly you can proceed through a questionnaire. While learning, do not click the **Next** button too quickly, because some pages show only one question initially, and show additional question(s) after you answer the first question. See [Figure 6.6 \(page 72\)](#) If you click **Next** too quickly, you will see an error message.
- Some questions that take the same type of answers are grouped together in a table (for example, medical history questions—see [Figure 6.7 \(page 73\)](#)). Be careful to select the correct answer for each question in the table.
- Always read on-screen directions carefully and follow them.
- If you need to pause or cancel the questionnaire, click the **Administration** button.

Example Questions from Assisted Questionnaires

This section gives examples of the various types of questions and answers that you will see in your study's assisted questionnaire stages. They are not actual questions taken from your study's questionnaires.

Exclusive Choice Questions

If a question proposes several answers, but only allows the participant to choose one answer, it will look like the question in [Figure 6.2 \(page 68\)](#) You click on the round button (called a radio button) beside the answer that the participant chooses.

Onyx

My biobank

Demo Questionnaire - Assisted / 6543

Question types / The simplest question: Radio buttons

What is your current marital status?

Married and/or living with a partner
 Divorced
 Separated
 Widowed
 Single, never married
 Prefer not to answer
 Don't know

Administration Previous Next

Patricia Martin - 2009-12-30 - 16:34:42 OBiBa / 1.6.0-SNAPSHOT-b6736@

Figure 6.2. When a question proposes several answers, but only allows the participant to select one answer, it's called an exclusive choice question

Multiple Selection Questions

If a question proposes several answers, and allows the participant to choose more than one answer, it will look like the question in [Figure 6.3 \(page 69\)](#) You click in the checkbox beside each answer that the participant chooses.

The screenshot shows a window titled "Demo Questionnaire - Assisted / 6543". The main content area is titled "Question types / Multi selection and multi columns". A question asks, "What is the language that you first learned at home in childhood and can still understand?". It specifies that more than one answer is possible and that a maximum of 4 answers can be selected. Below the question, there is a list of languages with checkboxes. Languages listed include Arabic, Chinese, Cree and any other Aboriginal languages, Dutch, English (which is checked), French (which is checked), German, Greek, Hindi, Hungarian, Italian, Korean, Persian (Farsi), Polish, Portuguese, Punjabi, Russian, Spanish, Tagalog (Filipino), Tamil, Ukrainian, Vietnamese, and Other. At the bottom of the list are two radio buttons: "Prefer not to answer" and "Don't know". Navigation buttons "Administration", "Previous", and "Next" are at the bottom left, and a status bar at the bottom right shows "Patricia Martin - 2009-12-31 ~ 16:47:21" and "OBiBa / 1.6.0-SNAPSHOT-b6736@".

Figure 6.3. When a question proposes several answers, and allows the participant to select more than one answer, it's called a multiple selection question

Open Answer Questions

Some questions provide a text field where you can enter the participant's reply. Such a question might look like the question in [Figure 6.4 \(page 70\)](#). The question may also provide some default answers if the participant does not provide an answer that you can enter in the text field. You enter the answer that the participant says in the text field or select one of the other answers. If you enter some text in a text field, the round button beside that answer will automatically be selected.

If you must enter a date in a field, it may have a calendar beside it. You can click on the calendar and choose a date. The date you chose will be inserted in the field, and you can modify it, if necessary.

The screenshot shows a computer window titled 'My Biobank' with the sub-titler 'Demo Questionnaire - Assisted / 6543'. The main content area is labeled 'Question types / Open answer' and contains the question 'How old were you when you first moved to your present address?'. Below the question are three radio button options: 'Age' (selected), 'Prefer not to answer', and 'Don't know'. At the bottom of the window are buttons for 'Administration', 'Previous', and 'Next'. The status bar at the bottom displays the date and time 'Patricia Martin - 2009-12-30 - 16:43:59' and the software version 'OBiBa / 1.6.0-SNAPSHOT-b6736©'.

Figure 6.4. When a question provides a text field in which you enter the participant's answer, it's called an **open answer question**

Multiple Questions on a Page

Some pages in a questionnaire contain several questions. Sometimes the page shows all the questions at once, as shown in [Figure 6.5 \(page 71\)](#).

Sometimes, a page only shows one question initially, and after you enter the answer to the first question, another question is displayed as shown in [Figure 6.6 \(page 72\)](#). For this type of page, if you select the **Next** button quickly, you may see an error message that tells you to reply to a question that was not displayed initially. Be sure to answer all questions on a page before selecting the **Next** button.

Completing Questionnaires

The screenshot shows a window titled "My brobank" with the sub-titler "Demo Questionnaire - Assisted / 6543". The main content area is titled "Question types / Multi parts question". It contains two sections: "What is your date of birth?" and "Year of birth (YYYY)". The "Year of birth (YYYY)" section includes a text input field, a radio button for "Prefer not to answer", and a selected radio button for "Don't know". Below it is another section "Month of birth (MM)" with a dropdown menu, a radio button for "Prefer not to answer", and a selected radio button for "Don't know". At the bottom left is an "Administration" button, and at the bottom right are "Previous" and "Next" buttons. The footer displays the user "Patricia Martin - 2009-12-30 - 17:42:56" and the software version "OBIBa / 1.6.0-SNAPSHOT-b6736@".

Figure 6.5. Some pages contain multiple questions

The figure consists of two side-by-side screenshots of a questionnaire interface. Both screenshots have a header bar with the 'My Biobank' logo, the title 'Demo Questionnaire - Assisted / 123456', and a progress indicator.

Screenshot 1 (Left):

- Header: 'Question types / More than one question per screen'
- Text: 'How often have you felt stress at work in the past year?
- Options: 'Never', 'Sometimes', 'Often', 'Always', 'Prefer not to answer', 'Don't know'
- Text on the right: 'Initially, only one question may be displayed'
- Footer: 'Administration' button, timestamp 'The Onyx Administrator - 2009-09-23 - 17:15:13', and a small logo.

Screenshot 2 (Right):

- Header: 'Question types / More than one question per screen'
- Text: 'How often have you felt stress at work in the past year?
- Options: 'Never', 'Sometimes' (selected), 'Often', 'Always', 'Prefer not to answer', 'Don't know'
- Text on the right: 'After you answer the first question, another question may be displayed'
- Text below: 'How often have you felt stress at home in the past year?
- Options: 'Never', 'Sometimes', 'Often', 'Always', 'Prefer not to answer', 'Don't know'
- Footer: 'Administration' button, 'Previous' and 'Next' buttons, timestamp 'The Onyx Administrator - 2009-09-23 - 17:15:13', and a small logo.

Figure 6.6. Some pages display one question initially, and display additional questions depending on the answer to the first question

Questions with Shared Category Answers

Some questions can be grouped together into a table because the answers to all of them can be selected from the same set of options. [Figure 6.7 \(page 73\)](#) shows a page with a set of questions with shared category answers. Take your time in order to select the correct answer for each question in the table.

	No	Yes	Prefer not to answer	Don't know
Animals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Food	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Medication	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pollen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Metal-Jewellery	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Insect stings, bites	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Latex	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Administration Previous Next

Patricia Martin - 2009-12-30 - 16:43:59 OBiBa / 1.6.0-SNAPSHOT-b6736©

Figure 6.7. Some pages contain a table of questions that all have the same possible answers

Example Questions from Self-Administered Questionnaires

This section gives examples of the types of questions that the participant will see in a [self-administered questionnaire \(page 65\)](#). They are not actual questions that you will see in a self-administered questionnaire in your version of Onyx. They are taken from an example Onyx web application, and serve to show the different types of question and answer formats that are possible.

Exclusive Choice Questions on a Touchscreen

If a question proposes several answers, but only allows the participant to choose one answer, it will look like the question in [Figure 6.8 \(page 74\)](#).

You must tell participants that they simply have to touch the answer that they want to choose.

The screenshot shows a touchscreen questionnaire interface. At the top, there is a header with the logo 'My biobank' and the text 'Demo Questionnaire - Self Administered / 1234567'. On the right side of the header is a link labeled 'Administration'. Below the header, the main content area has a title '1) What is your sex?'. A text instruction 'This is an instruction.' is displayed. A caption 'This is a caption' is positioned above a set of answer buttons. There are four buttons: 'Male' (disabled), 'Female' (disabled), 'Other' (highlighted with an orange border), and 'Prefer not to answer' (disabled). Below these buttons is another button labeled 'Don't know'. A note 'These are the specifications.' is present. At the bottom of the screen, there are navigation buttons for 'Previous' and 'Next', and a progress bar indicating '2% completed'. The footer contains the text 'The Onyx Administrator - 2009-09-24 - 11:47:35' and 'OBIBa / 1.6.0-SNAPSHOT-b20090923102635©'.

Figure 6.8. A touchscreen version of an exclusive choice question which proposes several answers, but only allows the participant to choose one

Visual Choice Questions on a Touchscreen

Some questions in a self-administered questionnaire allow the participant to choose their answer from a number of images. See [Figure 6.9 \(page 75\)](#).

You must tell the participant to touch the image that best represents their answer to the question.

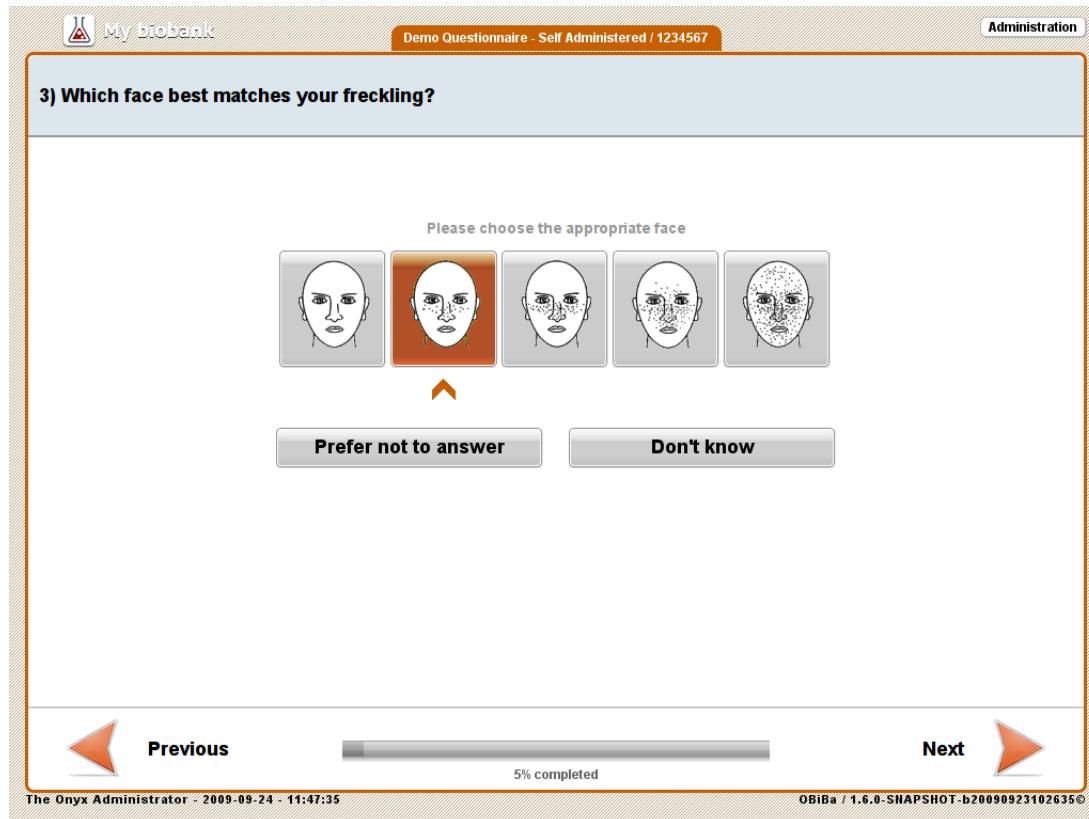


Figure 6.9. Some self-administered questions allow the participant to choose an image as an answer

Number Pad Questions on a Touchscreen

Some questions in a self-administered questionnaire require the participant to use an onscreen number pad to enter a numeric value. See [Figure 6.10 \(page 76\)](#).

You can give the participant the following explanation of how to use a number pad:

- To display the number pad, they must touch an onscreen button labelled **Press here**.
- They touch the keys on the number pad to tap out the number that answers the question.
- If they make a mistake, they can touch the **Clear** button.
- When the correct answer is displayed in the text box, they touch the **OK** button.

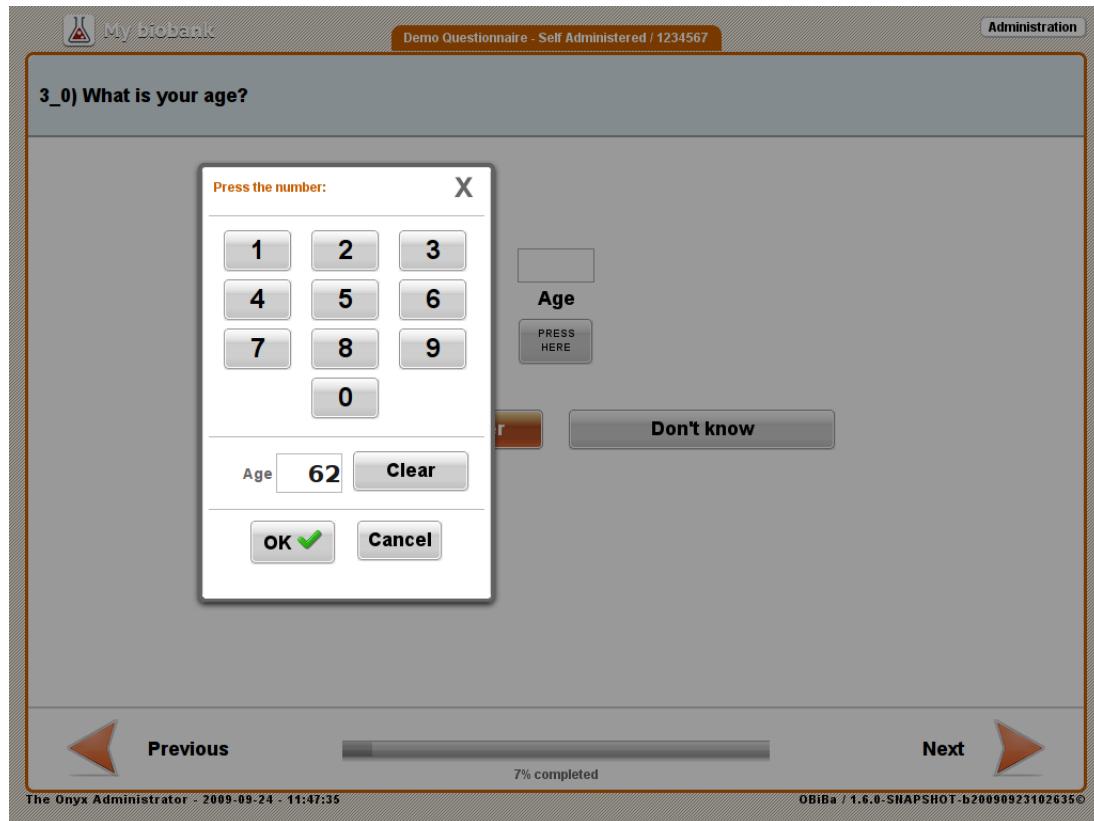


Figure 6.10. Some self-administered questions require the participant to enter numeric values on a number pad

Questions in a Table on a Touchscreen

Some questions in a self-administered questionnaire may be grouped together into a table because the choice of answers can be used for all the questions. [Figure 6.11 \(page 77\)](#) shows a table with a set of questions with shared category answers.

You can give the participant the following explanation of how to complete a table:

- The column headings show the answers that they will choose from for each question in the table.
- Each row contains a question. They slide their finger along the row and press when they arrive at the best answer for the question. A checkmark will be displayed in the box they pressed on.
- If they want to change an answer, they simply press a different box. The check for the previous answer will be removed and a checkmark will be displayed in the box for their new answer.
- If they decide they want to start the table over from scratch, they press the **Clear** button. Any checkmarks that were in the table are removed.

Completing Questionnaires

The screenshot shows a web-based questionnaire titled "Over the last 2 weeks, how often have you been bothered by any of the following problems ?". The interface includes a header with the logo "My biobank", the title "Demo Questionnaire - Self Administered / 1234567", and a "Administration" link. Below the title, instructions say "Make your choice by touching buttons to select or unselect:". A grid of symptoms is listed on the left, each with a row of response buttons at the top. The responses are: Not at all, Several days, More than half the day, Nearly every day, Prefer not to answer, and Don't know. The "More than half the day" button is highlighted in orange with a checkmark. The symptoms listed are:

Response	Not at all	Several days	More than half the day	Nearly every day	Prefer not to answer	Don't know
Feeling nervous, anxious or on edge	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not being able to stop worrying	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Worrying too much about different things	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Trouble relaxing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Being so restless it is hard to sit still	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Being easily annoyed or irritable	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Feeling afraid as if something awful might happen	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

A "Clear all" button is located below the grid. At the bottom, there are navigation links "Previous" and "Next" with orange arrows, a progress bar showing "94% completed", and footer text "The Onyx Administrator - 2009-09-24 - 11:47:35" and "OBIBa / 1.6.0-SNAPSHOT-b20090923102635©".

Figure 6.11. Some self-administered questions are grouped together in a table because the choice of answers is the same for all of the questions

Chapter 7. Collecting Physical Measurements

Physical measurements are often acquired for research studies. In Onyx, each physical measurement is considered a stage of the participant interview, so the general procedures for controlling an interview stage apply to physical measurement stages (see [Chapter 4 \(page 28\)](#)).



All Onyx interview stages, including physical measurements, are highly customizable. Each study defines which physical measurements must be collected, the sequence in which they must be collected (if there are any dependencies among the measurements), and establishes a way to determine if any of the measurements are contraindicated. Since Onyx is so customizable, it allows studies to include directions to staff members right in the Onyx pages used to collect the physical measurements.

Due to the fact that each study's physical measurement stages are unique, this chapter covers typical physical measurement stages. Example stage pages are taken from the Onyx example-webapp. In particular, this chapter covers these topics:

- Key concepts related to using Onyx to record physical measurements
- Workflow of a physical measurement stage
- Example physical measurement stage

Key Concepts

Mechanical Instruments

Mechanical instruments do not have any electronic components and so do not need to be plugged in. Onyx cannot read measurements directly from these instruments. Some examples are:

- Grip strength dynamometer (used to measure grip strength)
- Tape measure (used to measure circumference of upper arm, waist, hips)
- Mechanical stadiometer (used to measure height)

For measurements that use mechanical instruments, you enter the values manually in Onyx. See [Manual Entry of Measurements \(page 79\)](#)

Electronic Instruments

Electronic instruments are those that have electronic components. They usually have an on/off switch. They must be plugged in, or they are battery-powered, or perhaps both.

Here are some examples:

- Electrocardiogram
- Bone densitometer
- Electronic sphygmomanometer

Many electronic instruments can be connected directly to an Onyx workstation, so that Onyx can capture measurements automatically. If this is the case, they usually have their own software programme that you start from Onyx. See  [Automatic Capture of Measurements \(page 79\)](#) Some examples of electronic instruments that have their own software are:

- Minispir spirometer
- Sphygmocor CP (used to measure arterial stiffness)

Manual Entry of Measurements

Onyx permits manual entry of physical measurements. Manual entry is possible when measurements are done using:

- Mechanical instruments
- Electronic instruments that do not connect directly to an Onyx workstation
- Electronic instruments that are usually connected to Onyx—when the connection is not working

Automatic Capture of Measurements

Onyx can capture measurements automatically from instruments connected to the workstation. The capture is done in one of these ways, depending on the instrument:

- By launching the instrument's own computer programme

- By running a custom Onyx component that captures the measurements



Instruments Reserved for the Workstation

Each physical measurement stage requires a particular type of instrument, and each Onyx workstation must have a particular instrument of that type available to do the measurement. The Onyx **Workstation** page lists the instruments available on the workstation on which you are working. See [Managing an Onyx Workstation \(page 102\)](#).

When you start a physical measurement stage, Onyx checks the instrument list for the workstation to see if an instrument of the appropriate type is available. If Onyx determines that an appropriate instrument is available, you will be able to do the measurement. If Onyx does not find a suitable instrument for the measurement, you will not be allowed to proceed with the stage until an instrument is registered on the workstation. (see [Registering an Instrument \(page 105\)](#)). Registering instruments makes your work easier (fewer barcodes to scan) and ensures that it will be possible to identify which instrument was used to take a particular measurement for a particular participant.



Multiple Measurements



Depending on how the study defined a physical measurement stage, you may be allowed or required to enter more than one reading of a measurement.



Validation of Measurements



A study can define the range of values that are acceptable for a physical measurement. If your study defined acceptable values for a particular physical measurement stage, Onyx will validate the values you enter for the measurement. If a value you enter is not acceptable, a dialog will inform you, and you will have to enter an acceptable value in order to be able to finish the stage. Onyx can also check for discrepancies among multiple measurements



On-screen Report of Measurements

The last page of a physical measurement stage includes a report of the data collected during the stage. See [Figure 7.1 \(page 81\)](#).

Collecting Physical Measurements

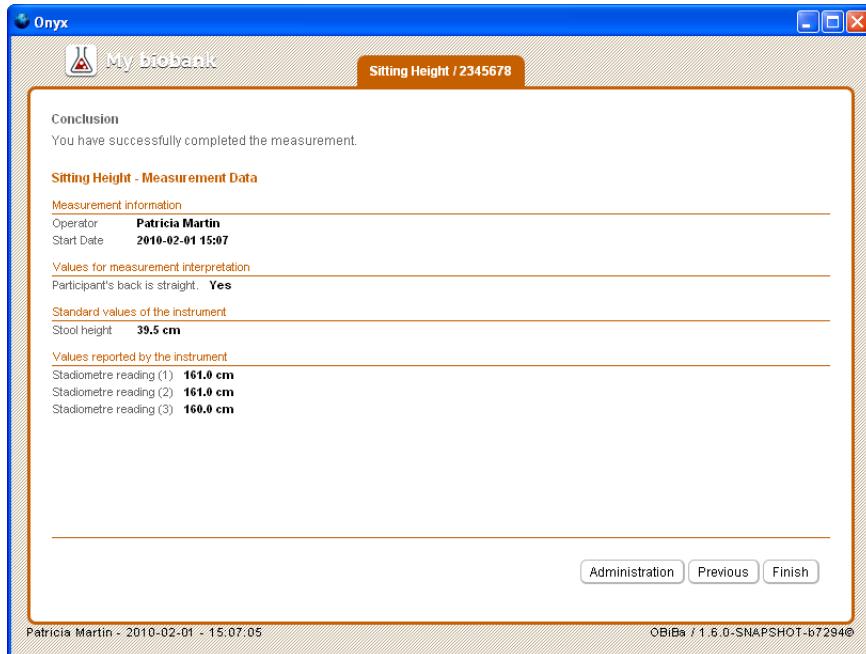


Figure 7.1. Example of a report displayed at the end of a physical measurement stage

Workflow of a Physical Measurement Stage

Since your study has defined its own physical measurement stages, this guide cannot give step-by-step procedures for taking physical measurements in your version of Onyx. Instead, this section describes the general workflow of a physical measurement procedure in Onyx.

[Figure 7.2 \(page 82\)](#) shows the general workflow of a physical measurement stage. For more details, see the section [Typical Steps in a Physical Measurement Stage \(page 82\)](#).

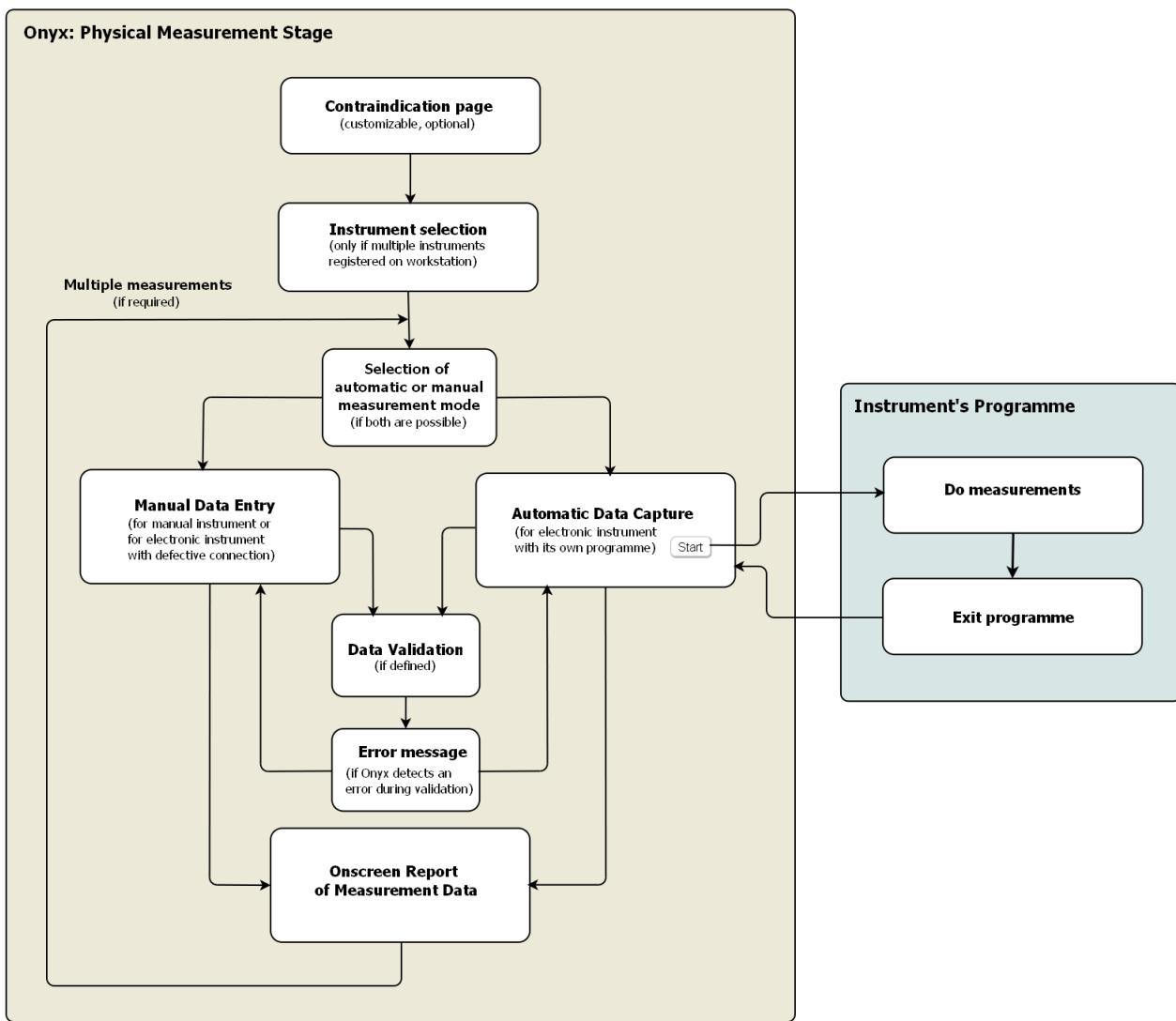


Figure 7.2. General workflow of a physical measurement stage

Typical Steps in a Physical Measurement Stage

This section explains the steps in a typical physical measurement stage. It describes the steps shown in [Figure 7.2 \(page 82\)](#) in more detail.

- Contraindication page.** Optional. A study can check for contraindications if necessary.
- Instrument selection.** Only necessary if several instruments appropriate for the measurement are registered on the workstation. See [Registering an instrument \(page 105\)](#).

C. Selection of automatic or manual measurement mode. This is only necessary if both modes of capturing data are possible. For example, you may need to choose manual entry for an electronic instrument when the connection (between Onyx and the instrument) is not working.

D. Automatic Data Capture. For electronic instruments with their own software.

1. The user starts the instrument's programme from Onyx.
2. The instrument programme is displayed on the Onyx workstation.
3. The user takes the measurements using the instrument programme, and then closes the programme.
4. When the instrument programme closes, Onyx fetches the measurement data from the programme and displays it in Onyx.

E. Manual Data Entry. The user enters measurements taken manually. When the instrument is mechanical or when the connection to an electronic instrument with its own software is not working.

F. Data Validation. Optional. If the study defined data validation, Onyx validates the data, and if there are any problems, notifies the user so they can redo the measurement.

G. Onscreen Report of Measurement Data. The user can display a report of the measurement data (captured automatically or entered manually).

Example Physical Measurement Stage: Spirometry

This section includes pages from an example physical measurement stage (a stage that collects spirometry measurements) and gives you a few pointers for recording physical measurements in Onyx.

The example **Spirometry** stage uses an instrument that is connected directly to the Onyx workstation. The instrument has its own programme that the user starts from Onyx. If the connection between the Onyx workstation and the spirometer is not functioning for some reason, the user could also start the instrument's programme outside Onyx, take the measurements, and then enter them manually in Onyx.

Collecting Physical Measurements

A. **Contraindication page.** Optional. A study can check for contraindications if necessary. [Figure 7.3 \(page 84\)](#) shows an example contraindication page.

Have you observed any condition that makes the spirometry measurement impossible?

No condition
 Yes, specify

Administration Previous Next

The Onyx Administrator - 2010-01-18 - 15:32:14 OBiBa / 1.6.0-SNAPSHOT-b7012

Figure 7.3. Example of a contraindication page from a physical measurement stage

Collecting Physical Measurements

B. Instrument selection. This is only necessary if several instruments appropriate for the measurement are registered on the workstation. If several instruments are available, you would have to select one of them by scanning or entering its barcode (and selecting enter) as shown in [Figure 7.4 \(page 85\)](#).

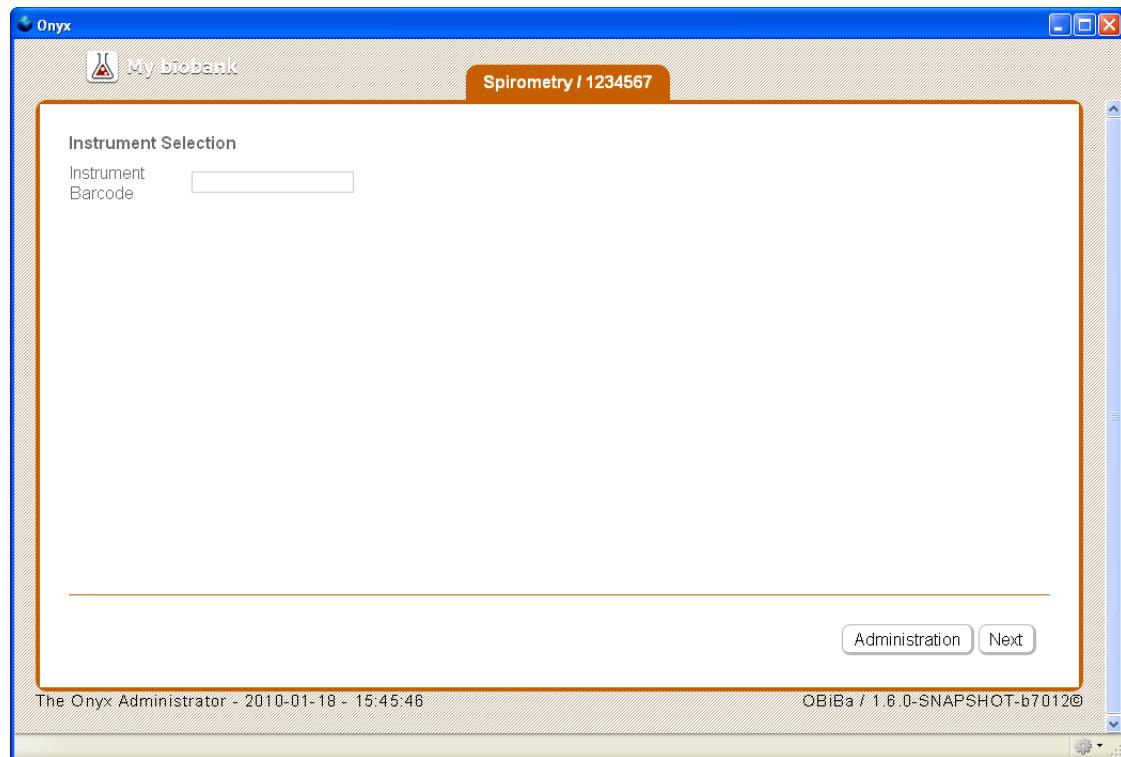


Figure 7.4. Example of selecting an instrument for a physical measurement stage

C. **Selection of automatic or manual measurement mode.** This is only necessary if both modes of capturing data are possible. For example, you would need to choose manual entry for an electronic instrument if the connection (between Onyx and the instrument) is not working. [Figure 7.5 \(page 86\)](#) shows an example of how a physical measurement stage could prompt the user to select automatic data capture or manual data entry. The user would select the **Start** button to start the instrument's own programme and then uses the programme to do the measurements. The user would select the **Add** button to add a set of measurements manually.

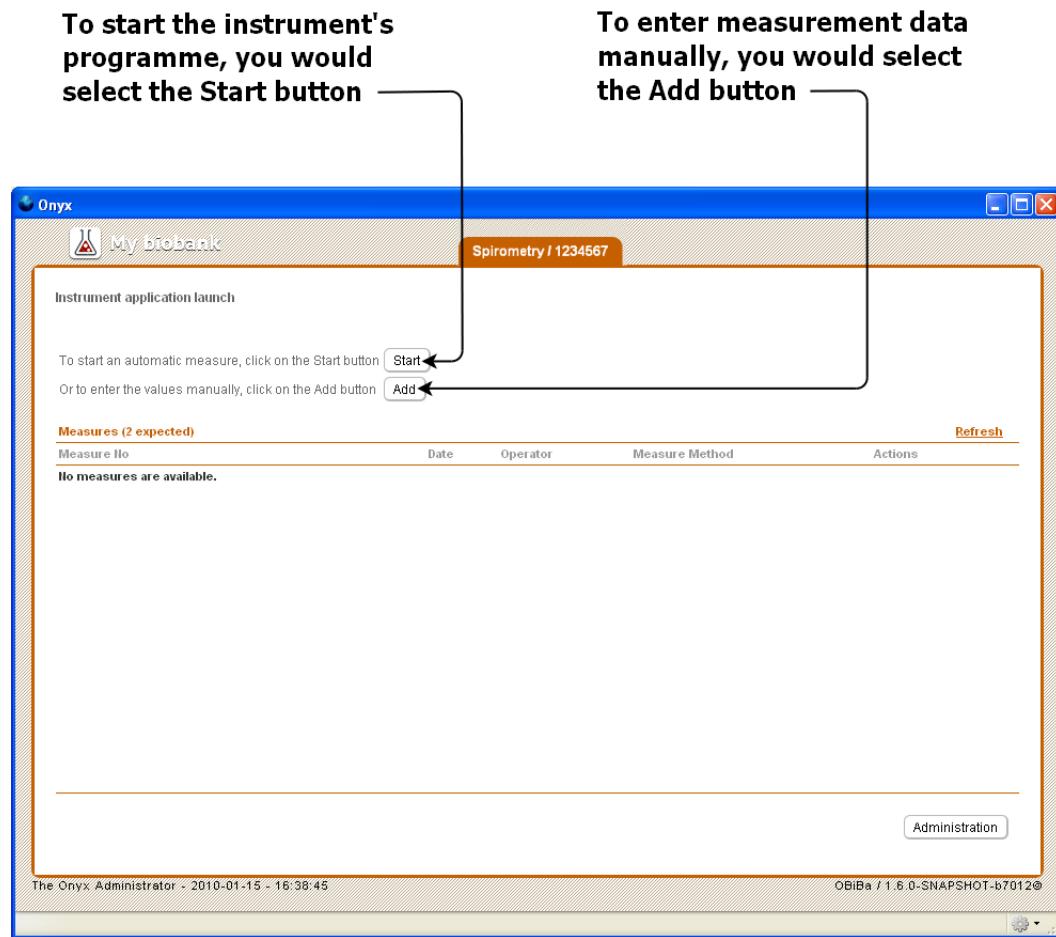


Figure 7.5. Example of choosing between manual data entry or automatic data capture for a physical measurement stage

D. **Automatic Data Capture.** For a particular physical measurement stage, automatic data capture may be required or it may be an option that the user chooses. In either case, the user would have to start the instrument's programme and then the procedure would be similar to the following:

Collecting Physical Measurements

1. After the user starts the instrument's programme from Onyx, it may take a moment or two for the programme to start. A couple of dialogs may be displayed while the programme is starting up. [Figure 7.6 \(page 87\)](#) shows some dialogs that might be displayed as the programme starts up. Usually, the user would select **OK** for such dialogs. The user would be trained how to use the instrument's software and could read the programme's documentation for more information.

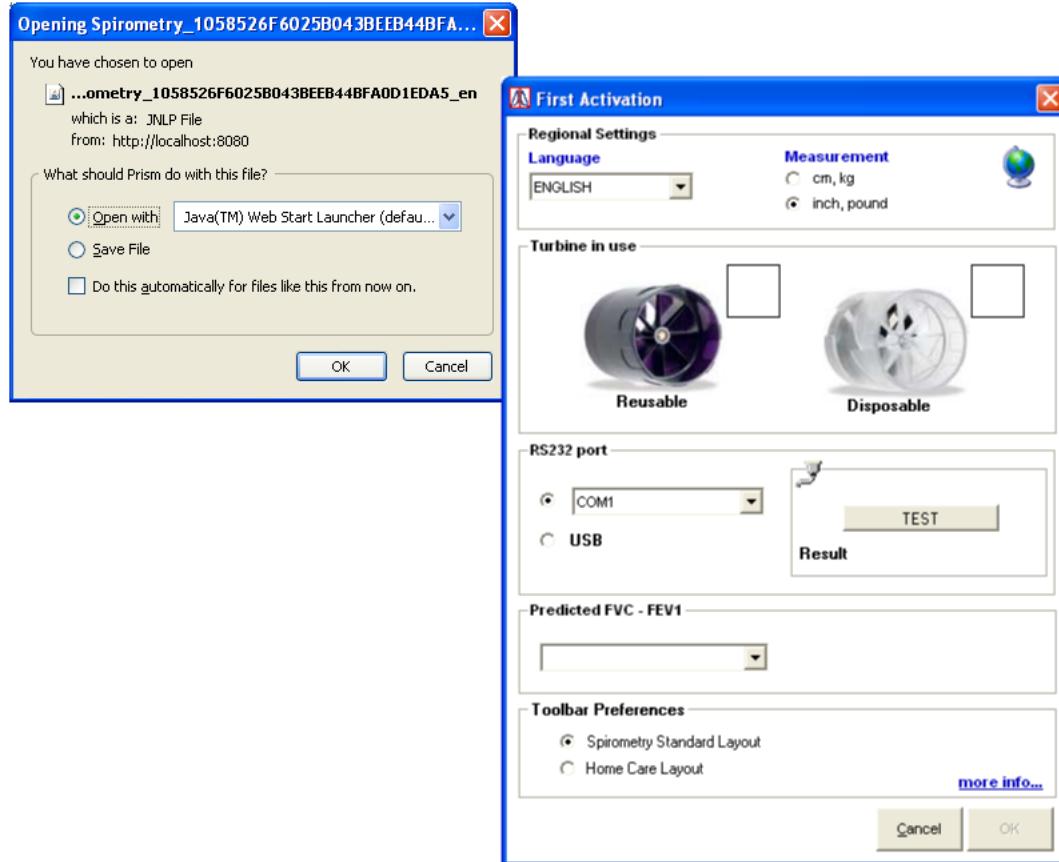


Figure 7.6. Example dialogs that may be displayed as the instrument's programme starts during a physical measurement stage

Collecting Physical Measurements

2. The instrument programme is displayed on the Onyx workstation. [Figure 7.7 \(page 88\)](#) shows an example of an instrument's own programme. The user makes the necessary measurements using the instrument's programme.

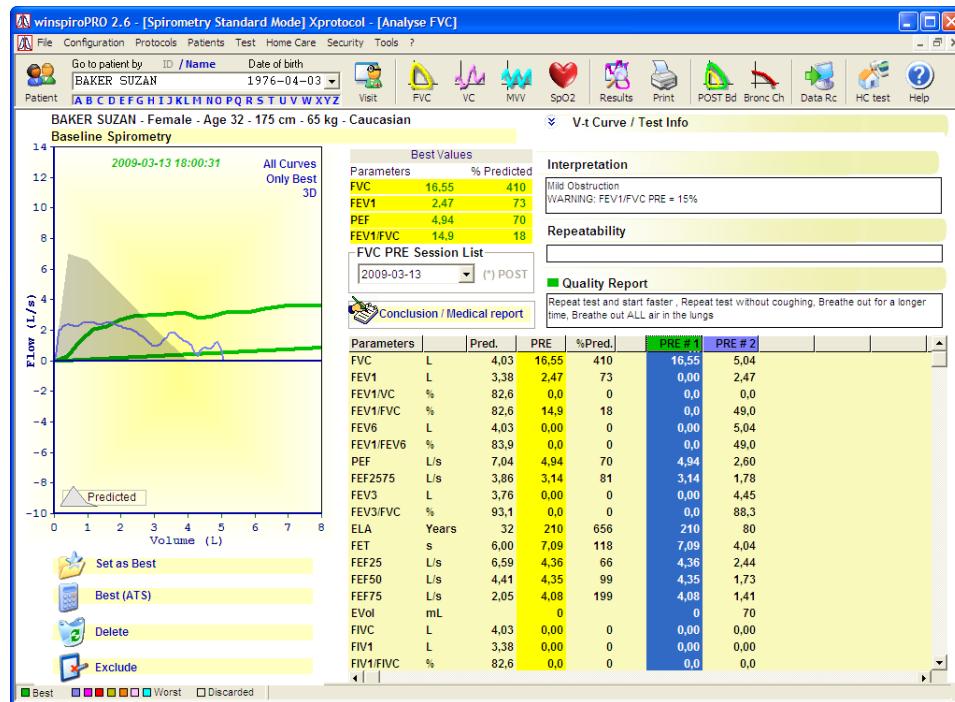


Figure 7.7. Example of an instrument's programme started from Onyx during a physical measurement stage

3. When the measurements are finished, the user would exit the programme.
4. When the instrument programme closes, Onyx fetches the measurement data from the programme.

E. Manual Data Entry. For a particular physical measurement stage, manual data entry may be required or it may be an option that the user chooses. Manual data entry is required for mechanical instruments and electronic instruments that do not connect directly to Onyx. It may be an option for electronic instruments that have their own programme for doing measurements. If the user enters the data manually, the procedure will be similar to the following:

1. Onyx would display a **Manual Data Entry** page or dialog. [Figure 7.8 \(page 89\)](#) shows an example of such a dialog.

Collecting Physical Measurements

The screenshot shows a software dialog box titled "Manual Entry". At the top right is a close button (X). Below the title, the text "Please provide the following information:" is displayed. Underneath this, there are three items: "Measured FVC", "Measured FEV1", and "Measured FEV1/FVC". To the right of each item is a text input field. The first two fields have a unit indicator "L" to their right, while the third has a unit indicator "%" to its right. At the bottom of the dialog are two buttons: "Ok" and "Cancel".

Figure 7.8. Example of a dialog for entering data manually in a physical measurement stage

2. The user makes the necessary measurements, enters them in the dialog, and saves them.

Collecting Physical Measurements

F. Validation. If the study included data validation in the stage, Onyx would validate the data. If an error is detected, Onyx would display a message to inform the user about the error and to prompt them to make a new measurement.

If a measurement passes validation, Onyx adds the measurement to a list displayed in Onyx. [Figure 7.9 \(page 90\)](#) shows an example of how measurements would be listed in Onyx.

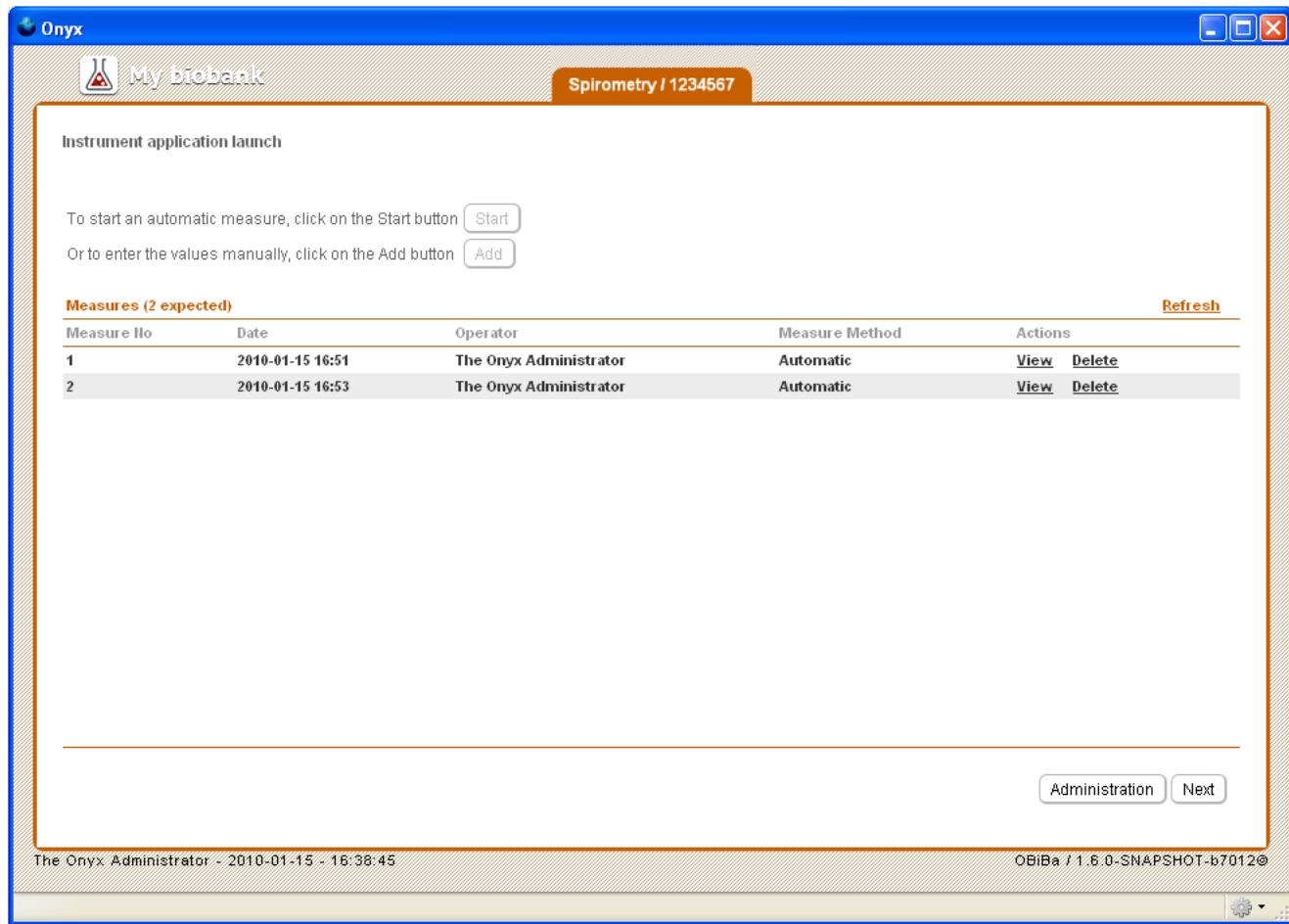


Figure 7.9. Example of a list of measurements acquired during a physical measurement stage

Collecting Physical Measurements

G. Onscreen Report of Measurement Data. The last page of the stage includes a report of the measurement data (captured automatically or entered manually). [Figure 7.10 \(page 91\)](#) shows an example of how automatic measurements would be listed in Onyx.

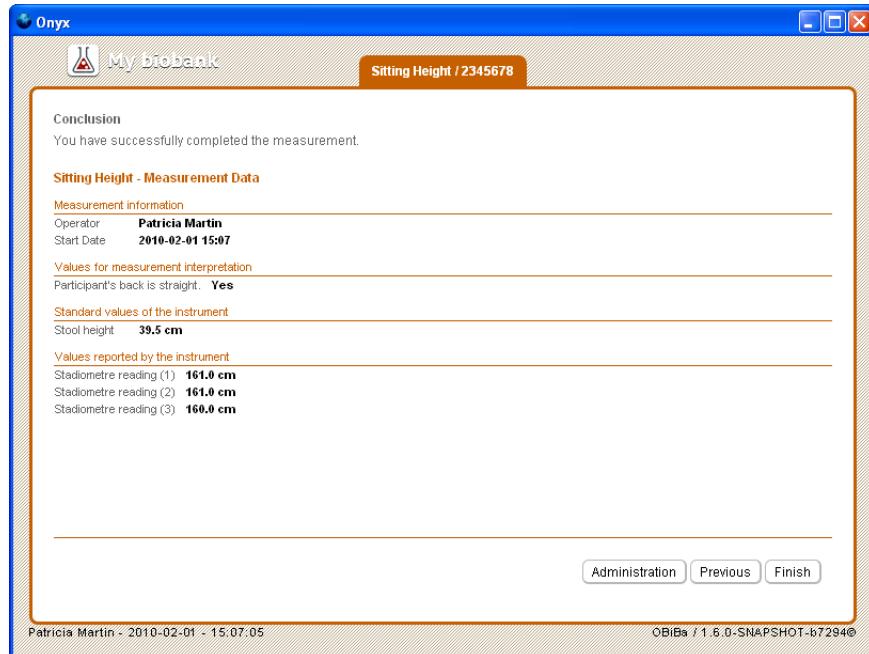


Figure 7.10. Example of an onscreen report of measurement data

Additional Measurements. If additional measurements are required, the user would select **Start** again (to take another automatic measurement) or **Add** again (to enter another measurement manually).



Pointers for Physical Measurement Stages

Here are a good practices related to physical measurement stages:

- If your study has defined calibration procedures for any or all of the instruments used for physical measurement stages, your centre should calibrate the instruments following standard operating procedures and according to the schedule defined by your study. See [Calibrating an instrument \(page 115\)](#).
- Follow Onyx's on-screen instructions carefully.
- When working in an instrument's programme, follow on-screen instructions carefully and read the programme's user documentation for more information.
- If multiple measurements are required, be sure to acquire them all. Depending on how the stage has been customized, Onyx will probably prompt you if more measurements are needed.

Collecting Physical Measurements

- After you have obtained the required measurements, view the onscreen report and check that the data displayed in Onyx seems to be valid.

Chapter 8. Collecting Biospecimens

Biospecimens are often collected for research studies. In Onyx, biospecimens are collected during stages of the participant interview, so the general procedures for controlling an interview stage apply to biospecimen collection stages (see [Chapter 4 \(page 28\)](#)).



All Onyx interview stages, including those used to collect biospecimens, are highly customizable. Each study defines which biospecimens must be collected and establishes a way to determine if the collection of a particular biospecimen is contraindicated. Specimens that are routinely collected include blood, urine, and saliva. But your study could have defined collection of other types of biospecimen. Onyx allows studies to include directions to staff members right in the Onyx pages used to collect the biospecimens.

Due to the fact that each study's biospecimen collection stages are unique, this chapter cannot discuss the actual biospecimen collection stages defined by your study. Instead, this chapter includes:

- [Key concepts \(page 93\)](#) that apply to all biospecimen collection stages
- [An example of a biospecimen collection stage \(page 96\)](#)

Key Concepts

Multiple Samples

For a particular biospecimen collection stage, multiple samples of the particular biospecimen can be collected. For example, a study could require that five tubes of blood be collected.

Multiple Stages

A study can define its biospecimen stages in any way that is convenient.

- A study can collect different types of biospecimen (blood, urine, saliva, and so on)
- A study can define one or more biospecimen stages
- Each stage can collect one or more types of specimen
- A particular type of specimen can be collected in one or more stages
- Several stages may be necessary to match contraindication constraints. For example, blood collection may be contraindicated but not urine collection, so it would be necessary to collect them in separate stages.

[Figure 8.1 \(page 94\)](#) gives some examples of how biospecimen stages could be defined to suit a study's requirements.

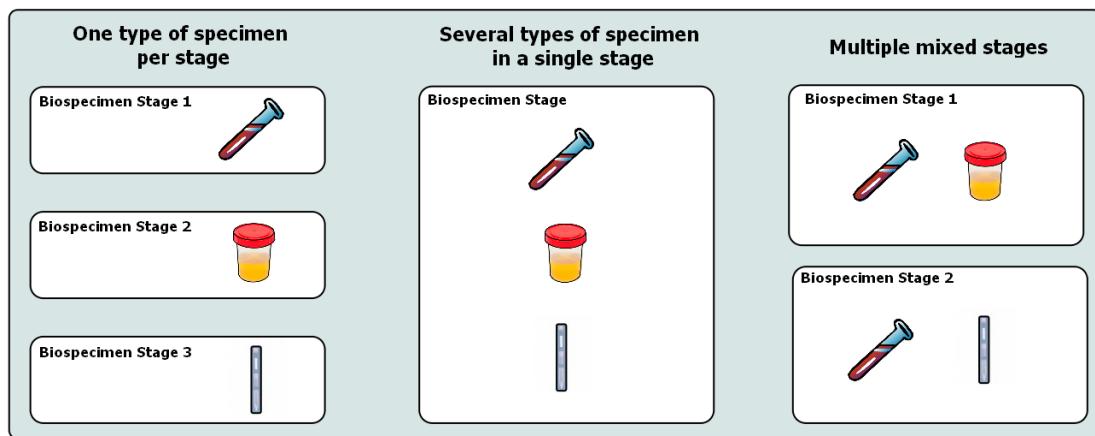


Figure 8.1. Biospecimen stages can be defined in any way that is convenient for the study

Sample Barcode

Typically, the receptacles used to collect biospecimens are labelled with barcodes that you scan during the biospecimen collection stage.



Onyx can be customized to validate the format of the barcode. If the barcode does not pass the validation when you scan it, Onyx displays an error message.

Samples Collected vs. Samples Expected

The last page of a biospecimen collection stage usually displays a report of the number of the number of *samples collected* (the number of barcodes that have been scanned)

and the number of *samples expected* (the number of samples defined by the study). [Figure 8.2 \(page 95\)](#) shows an example page that reports this information. If too few samples were collected, you can select the **Previous** button to return to the page in which you can scan additional barcodes.

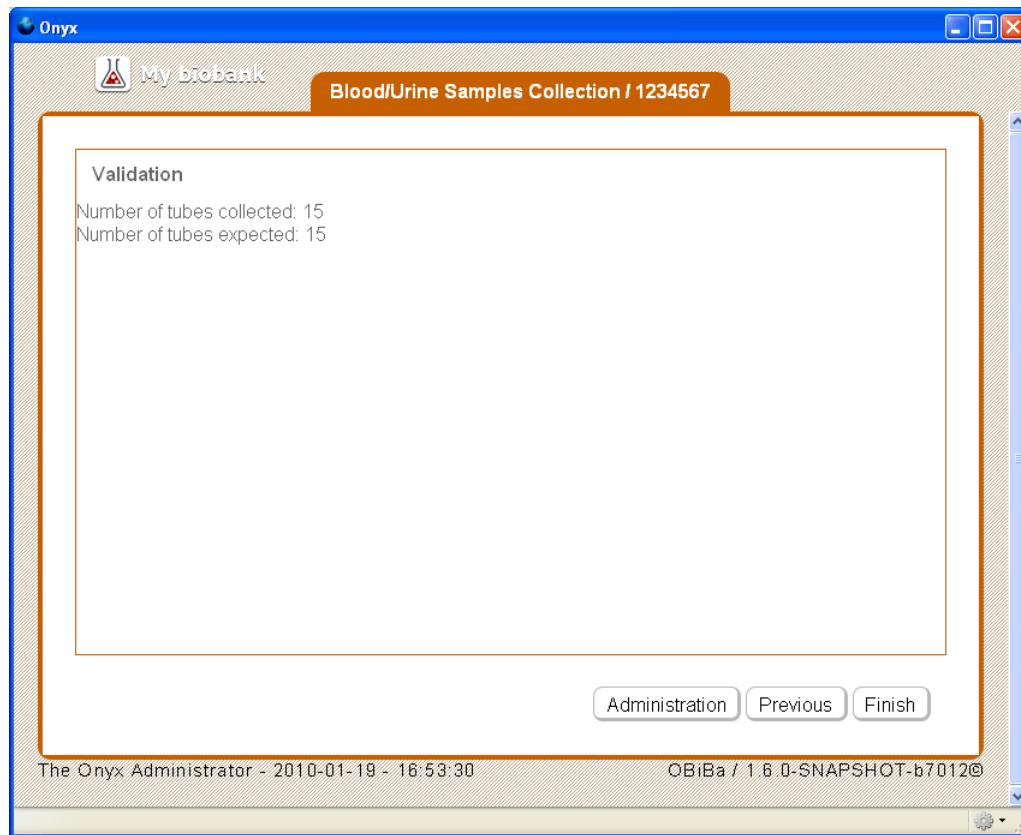


Figure 8.2. A biospecimen stage usually validates the number of samples collected against the number of samples expected

Predefined Comments and Open Comments

Your study may have defined a number of comments that you can associate with a particular sample. You choose the comment from a list. The use of predefined comments makes it possible to categorize the biospecimens collected.

Your study may also have provided a text box in which you can enter an open comment.

You will also be able to enter an open comment in the standard Onyx way when you finish the stage. You select **Administration** and then **Finish**. At that point an Action window will be displayed that contains a text field for any final comments you need to make about the stage. See [Finishing a stage \(page 46\)](#).

Example Biospecimen Collection Stage

Apart from scanning the barcodes on sample receptacles, there is really nothing special about the procedures for biospecimen collection stages.

See [Chapter 4 \(page 28\)](#) for the general procedures used to navigate through an interview stage.

Since your study has defined its own biospecimen collection stages, this guide cannot include procedures for those stages in your version of Onyx. Instead, this section uses an example blood and urine collection stage. [Figure 8.3 \(page 96\)](#) shows the data entry page of the example stage, and gives some pointers that apply to any biospecimen collection stage.

Studies may allow users to add a predefined remark ...

Studies can display customized instructions for staff members

...or an open comment about a sample

...by selecting Edit

Studies may allow users to delete samples in case of error

Barcode	Tube type	Remark	Comment	Edit	Delete
2345678011	P-Na+urate	Clotted sample	Suspect tube	Edit	Delete
2345678091	Urine			Edit	Delete
2345678081	Paxgene			Edit	Delete
2345678071	ACD			Edit	Delete
2345678061	EDTA-HbA1c			Edit	Delete
2345678051	EDTA-Hematol.			Edit	Delete
2345678044	EDTA			Edit	Delete
2345678043	EDTA			Edit	Delete
2345678042	EDTA			Edit	Delete
2345678041	EDTA			Edit	Delete
2345678031	P-PST			Edit	Delete
2345678025	S-SST			Edit	Delete
2345678024	S-SST			Edit	Delete
2345678023	S-SST-LAB			Edit	Delete
2345678022	S-SST-LAB			Edit	Delete

Administration Previous Next

Patricia Martin - 2010-01-08 - 14:27:31 OBIBa / 1.6.0-SNAPSHOT-b6736@

Figure 8.3. The data entry page of an example biospecimen collection stage

Chapter 9. Managing Your Onyx User Profile

As an Onyx user, you can make a few changes to the way you interact with Onyx.

The information in this chapter apply to all Onyx users (data collectors, participant managers, and system administrators).

This chapter covers these topics:

- [The user profile page \(page 97\)](#)
- [When you cannot change your user profile \(page 99\)](#)
- Procedures:
 - [Changing the language of the Onyx user interface \(page 99\)](#)
 - [Changing your Onyx user password \(page 100\)](#)

The User Profile Page

The main pages of the Onyx user interface include a **Profile** link in their upper right corner.

Managing Your Onyx User Profile

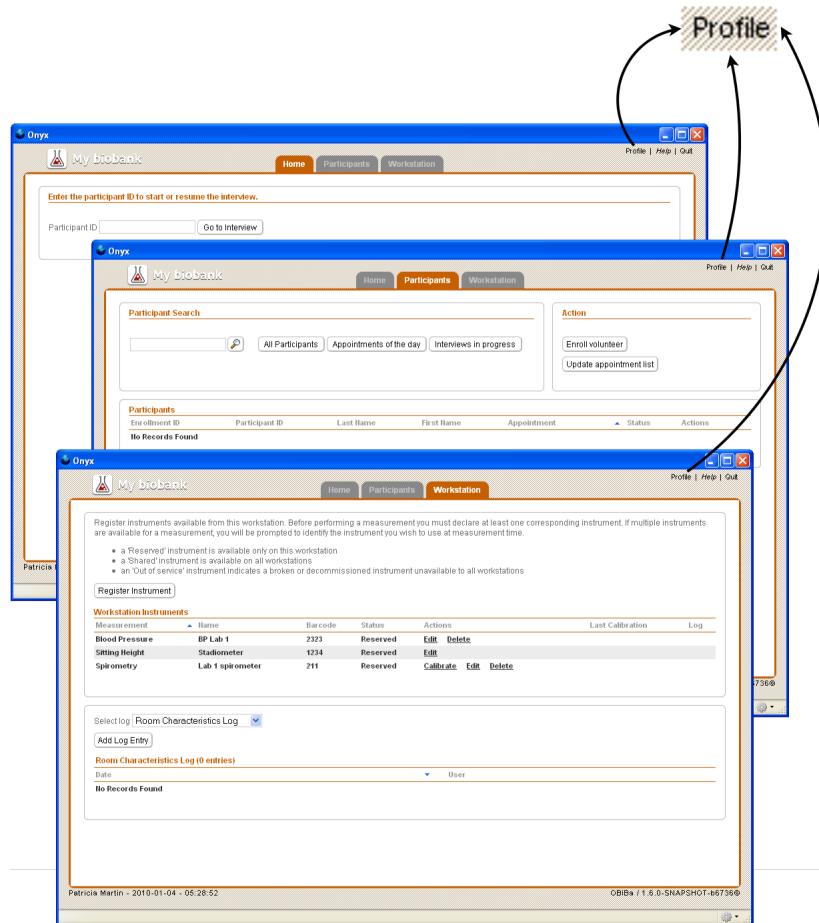


Figure 9.1. The main pages of Onyx include a Profile link

When you select the **Profile** link, you see a page that allows you to view and change your user profile. [Figure 9.2 \(page 99\)](#) shows the user profile page.

Managing Your Onyx User Profile

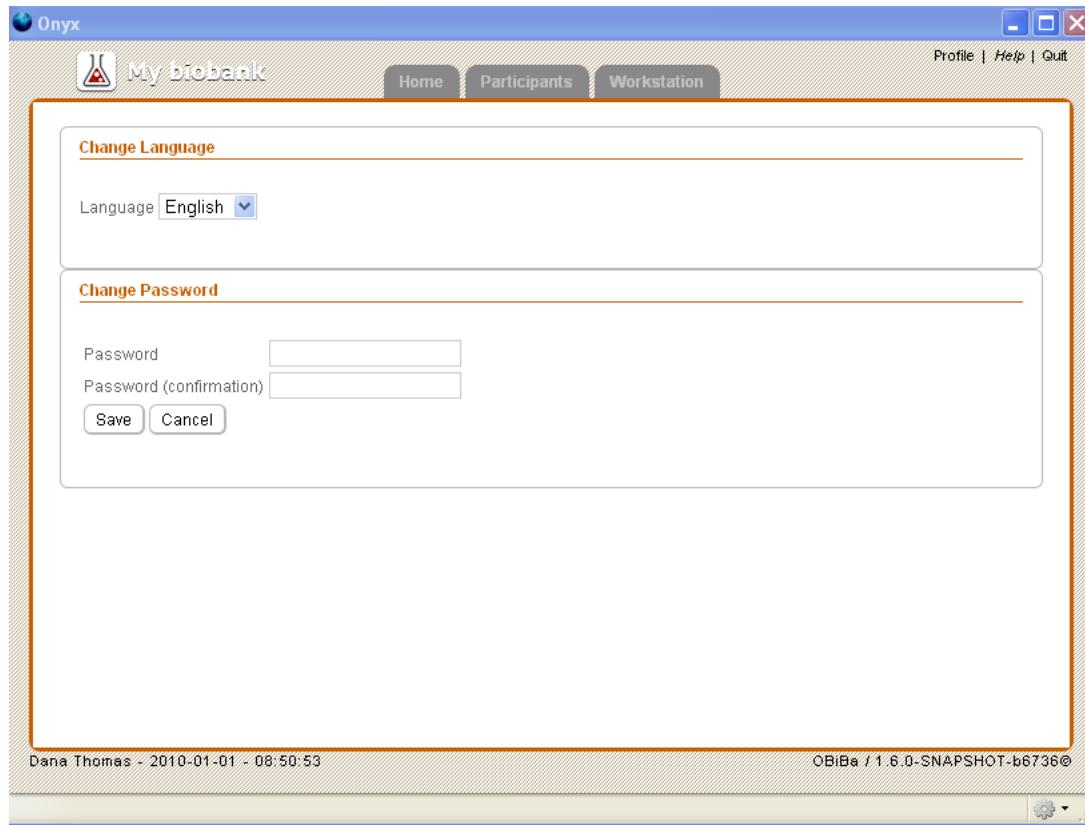


Figure 9.2. The User Profile page

When You Cannot Change Your User Profile

The **Interview** page and the pages of interview stages do not include a **Profile** link which would give access to the user profile page. To ensure the integrity of interview data, Onyx verifies the interviewer's user name and password when most actions are taken during an interview. For this reason, it is not possible to change your user profile during the course of a participant interview. However, you can exit the interview, make changes to your profile, and then re-enter the interview. See the prerequisites in the [Procedures \(page 99\)](#) section of this chapter.

Procedures

This section contains procedures related to managing your Onyx user profile.



Changing the Language of the User Interface

The pages of the Onyx user interface can be displayed in different languages. By default, two languages are available: English and French.



Your study may have translated the Onyx user interface or some parts of it (for example, a questionnaire) into additional languages—other than French and English.

Prerequisite

If you need to change the language of the Onyx interface during the course of a participant interview, you must temporarily exit the interview as follows:

- If you're in the middle of an interview stage, pause the interview stage. See [Pausing an interview stage. \(page 47\)](#)
- Exit the **Interview** page. See [Exiting the Interview page \(page 40\)](#).

After you change the language of the user interface, you can re-enter the participant's interview and resume the stage as explained in [Entering the Interview page \(page 40\)](#) and [Resuming a stage \(page 47\)](#).

Procedure

1. Select the **Profile** link in the upper right corner of the Onyx page. Your user profile is displayed. If you do not see a **Profile** link, see the [Prerequisite section \(page 100\)](#).
2. Select a language from the drop-down list in the top half of the profile page. The language of the Onyx interface is changed immediately for the current page and for all other pages for which the selected language is available. If a label is not available in the selected language, a default label is displayed.
3. Return to the rest of the Onyx user interface by selecting a tab (**Home**, **Participants** or **Workstation**).



Changing Your Password

If you know your current user password, you can change your Onyx user password as explained in this section.

If you do not remember your current user password, the system administrator can reset it to a temporary password, and afterwards you should follow this procedure to change it to a new password that only you will know.

Prerequisite

If you are in the middle of a participant interview, you cannot change your password. You must temporarily exit the interview as follows:

- If you cannot exit the interview, because you do not remember your current user password, see your system administrator.
- If you're in the middle of an interview stage, pause the interview stage. See [Pausing an interview stage. \(page 47\)](#)
- Exit the **Interview** page. See [Exiting the Interview page \(page 40\)](#).

After you change your password, you can re-enter the participant's interview and resume the stage as explained in [Entering the Interview page \(page 40\)](#) and [Resuming a stage \(that was paused\) \(page 47\)](#).

Procedure

1. Select the **Profile** link in the upper right corner of the Onyx page. Your user profile is displayed. If you do not see a **Profile** link, see the [Prerequisite section \(page 100\)](#).
2. Enter the same new password in the **Password (confirmation)** field in the lower part of the page.
3. Select the **Save** button. Your new password is effective immediately.
4. Return to the rest of the Onyx user interface by selecting a tab (**Home**, **Participants** or **Workstation**).

Chapter 10. Managing an Onyx Workstation

An Onyx workstation is a key component in the experimental setup of your study. The **Workstation** page allows you to manage this important piece of research equipment.

The main reasons you need to manage a workstation are:

- *To set up the workstation so that participant interviews can be carried out as easily as possible.* For example, since a particular set of instruments is always used with a particular workstation, the **Workstation** page is used to register and reserve those instruments for the workstation. After instruments are registered and reserved for the workstation, Onyx will automatically identify the instrument that will be used for a measurement. Staff members do not have to scan an instrument barcode each time they take a measurement.
- *To store data about the experimental setup.* For example, to calibrate instruments and to log experimental conditions.

This chapter covers these topics:

- The [Workstation page](#) (page 103) and its important features
- Key Concepts related to the **Workstation** page
- Procedures related to instruments and experimental condition logs:
 - [Registering an instrument](#) (page 105)
 - [Setting the status of an instrument](#) (page 111)
 - [Editing instrument information](#) (page 113)
 - [Calibrating an instrument](#) (page 115)
 - [Viewing the calibration log for an instrument](#) (page 118)
 - Exporting the calibration log of an instrument - available soon
 - [Logging experimental conditions](#) (page 119)
 - [Viewing experimental condition logs](#) (page 122)

The Workstation Page

The Onyx **Workstation** page allows you to register information about a particular Onyx workstation—the one on which you are currently working.

Mainly, you go to the **Workstation** page when you need to add or calibrate the instruments that are used to take physical measurements on the workstation and to log experimental conditions required for your study.

You access the **Workstation** page by selecting the **Workstation** tab. [Figure 10.1 \(page 103\)](#) shows the **Workstation** page and points out its main features.

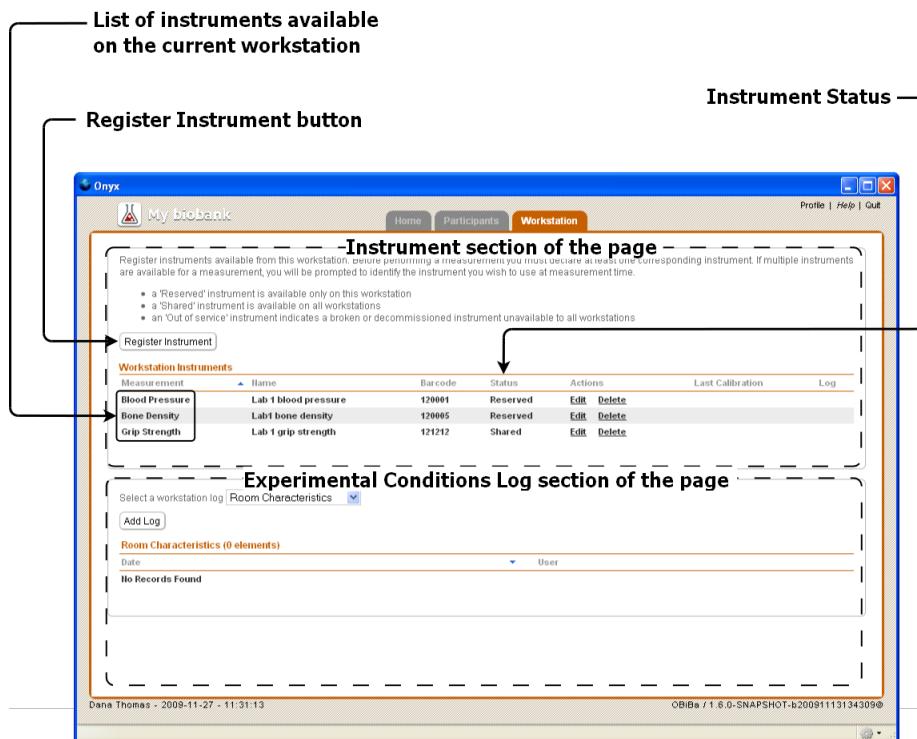


Figure 10.1. The Workstation page

Here is an overview of the important features of the **Workstation** page:

- The **Instruments section** of the page allows you to register, edit, delete, and calibrate the instruments used with this workstation. This section contains:
 - The **Register Instrument** button opens a dialog that allows you to add an instrument to the list.
 - The **Instrument Status** indicates whether the instrument is available for the current workstation. The status can be: [Reserved \(page 105\)](#) [Shared \(page 105\)](#) or [Out of service \(page 105\)](#).

-  The **Experimental Condition Log** section of the page allows you to record the experimental conditions that affect the instruments used to collect data. These logs are a customizable feature of Onyx. If your study has not defined any, the **Workstation** page will not have an Experimental Condition Log section.

Key Concepts

This section contains key concepts related to the **Workstation** page:

Instrument

A device used to take a physical measurement required by the study. All instruments that will be used with a particular Onyx workstation need to be [registered \(page 104\)](#) on it. A particular instrument can be used for several types of measurement and during different physical measurement stages (for example, a tape measure). Even if an instrument is not electronic (for example, a grip strength dynamometer) or is not physically connected to the workstation (for example, an electronic scale), it must be registered on the workstation.

Laboratory instruments, used for the analysis of biospecimens, do not need to be registered on Onyx workstations.

Registering vs. Reserving an Instrument

Registering an instrument means adding it to the list of instruments used on the workstation on which you are currently working. See the procedure [Registering an Instrument \(page 105\)](#).

Reserving an instrument means that the instrument will only be used on one workstation. When you register an instrument on a particular workstation, its status is automatically set to [Reserved \(page 105\)](#), which means it will only be used with that workstation. If an instrument will be used with several workstations (for example, a grip strength dynamometer), its status must be set to **Shared** on one of the workstations. Then the instrument can be used with any workstation at the site. See [Setting the Status of an Instrument \(page 111\)](#).

Why Register Instruments?

The advantage of registering and reserving instruments (or setting their status to shared) is that Onyx will automatically identify the instrument used to take measurements during interviews. If no instrument is registered for a particular type of measurement, staff

members will have to scan a barcode or enter an instrument ID manually before each measurement.

Instrument Status

The status of an [instrument \(page 104\)](#) that has been registered on the current workstation—meaning the workstation on which you are viewing the **Workstation** page.

An instrument's status appears in the **Status** column of the **Workstation** page. The possible values for status are:

- **Reserved** — This status means that the instrument is used exclusively on the current workstation. If an instrument's status is **Reserved**, the instrument will only be listed in the on the workstation on which it was registered.
- **Shared** — This status means that the instrument can be used on the current workstation and other workstations at the site. If an instrument's status is **Shared**, the instrument will be listed in the [Workstation page \(page 103\)](#) of all workstations at the site.
- **Out of service** — This status means that the instrument is not available for some reason. The reason can be a technical problem or any other reason. If an instrument's status is **Out of Service**, the instrument will be listed in the [Workstation page \(page 103\)](#) of all workstations at the site.

Calibration Log

A record of the dates and times at which an instrument was calibrated. The log contains an entry for each calibration that includes comments about whether the calibration was successful and if not, the error message that was generated.



In order for it to be possible to calibrate an instrument, your study must have configured Onyx accordingly.

Procedures

This section contains procedures related to managing and calibrating instruments and maintaining logs of experimental conditions.



Registering an Instrument

When an instrument is going to be used with a particular workstation, you must register it on that workstation as explained in this section.

A particular instrument can be used for several types of measurement on a workstation. For example, a tape measure could be used for measurements in several different physical measurement stages. After you register an instrument for one measurement, you can register it for additional measurements as explained in [Registering an Instrument for Additional Types of Measurement \(page 109\)](#).

If an instrument is going to be used with several workstations, the instrument must be registered on each of those workstations as explained in this section. Then its status must be set to **Shared (page 105)** on one of the workstations as explained in [Setting the Status of an Instrument \(page 111\)](#).

Prerequisites

To register an instrument, you need to know certain information about it. It is best to determine this information before you start the [procedure \(page 105\)](#):

- **Measurement** — The type of measurement that the instrument is used for. This information is required.
- **Barcode** — You can use a scanner to complete this field or manually enter the number on a barcode label. This information is required. If the instrument does not have a barcode label, you must find a value to enter in this field.
- **Name** — Your assessment centre may have come up with a scheme for naming instruments. It could include the instrument type and location. For example: Lab 1 Blood Pressure. This information is optional.
- **Vendor** — The manufacturer of the instrument. This information is optional.
- **Model** — Usually indicated on a label somewhere on the instrument. This information is optional.
- **Serial Number** — Usually indicated on a label somewhere on the instrument. This information is optional.

Procedure

1. If the **Workstation** page (see [Figure 10.1 \(page 103\)](#)) is not displayed, select the **Workstation** tab to display it.
2. Select the **Register Instrument** button. The **Register Instrument** dialog is displayed. See [Figure 10.2 \(page 107\)](#).

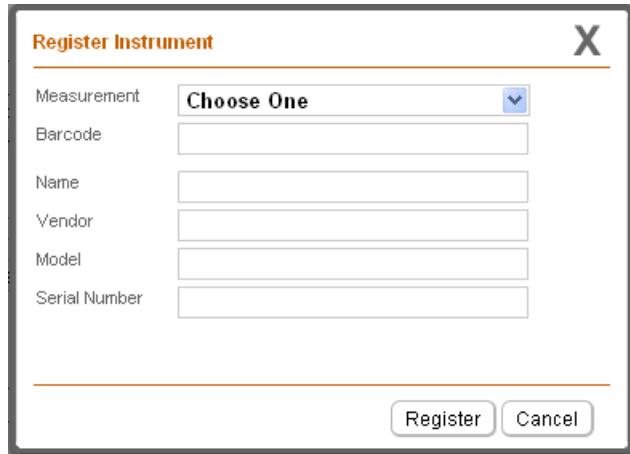


Figure 10.2. The Register Instrument dialog

3. Select the arrow beside the **Measurement** field and select the type of measurement for which the instrument is used.

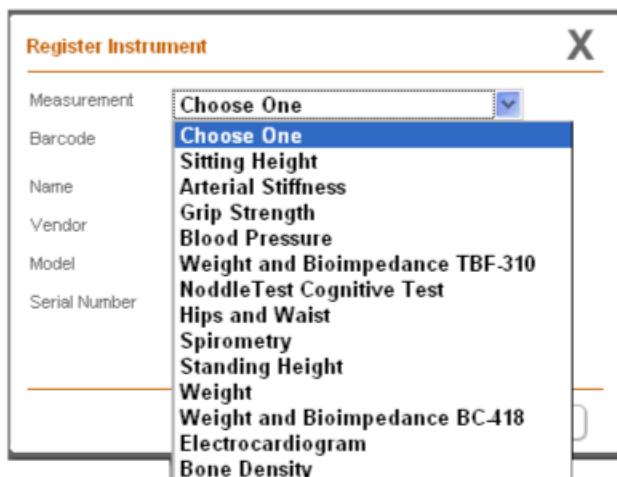


Figure 10.3. Measurement list in the Register Instrument dialog



The types of measurement that appear in the list is customizable so the list may contain different items in your version of Onyx.

4. Complete the **Barcode** field by scanning the barcode (the number is displayed in the field) or by entering a value manually (if you don't know what value to enter, see [Prerequisites \(page 106\)](#)).
5. Use the mouse or tab key to select the **Name** field. When you do this, a message is usually displayed:

Instrument is unknown, please enter the following information:

You do not see the above message if the instrument was already registered on this workstation. Onyx automatically fills in the remaining fields on the page and you cannot edit them—skip the next step.

6. Enter values in the **Name**, **Vendor**, **Model** and **Serial Number** fields. These fields are optional so you can complete them later if you don't have the information now. If you need help completing these fields, see [Prerequisites \(page 106\)](#). [Figure 10.4 \(page 108\)](#) shows an example.

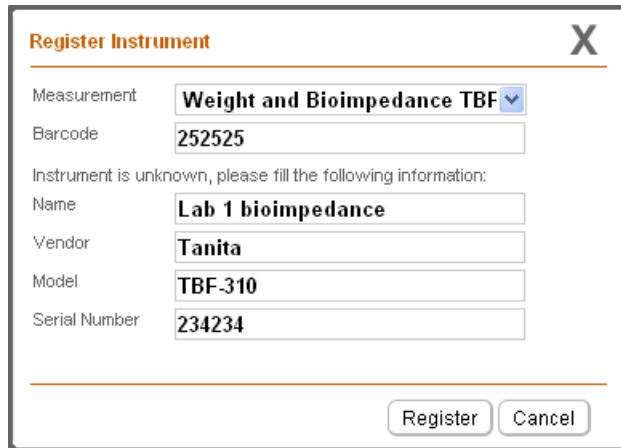


Figure 10.4. Example of how to complete the Register Instrument dialog

7. If you decide not to register the instrument, select the **Cancel** button. The **Register Instrument** dialog closes and the **Workstation** page is visible again without any new items in the instrument list.
8. If you want to register the instrument, select the **Register** button. The **Register Instrument** dialog closes and the new instrument now appears in the list on the **Workstation** page. See [Figure 10.5 \(page 109\)](#)

By default, the instrument's status is set to [Reserved \(page 105\)](#). If the instrument will be used with several workstations, you must set its status to [Shared \(page 105\)](#) as explained in [Setting the Status of an Instrument \(page 111\)](#).

9. If you need to register the instrument for another type of measure, do so as explained in [Registering an Instrument for Additional Measurements \(page 109\)](#).

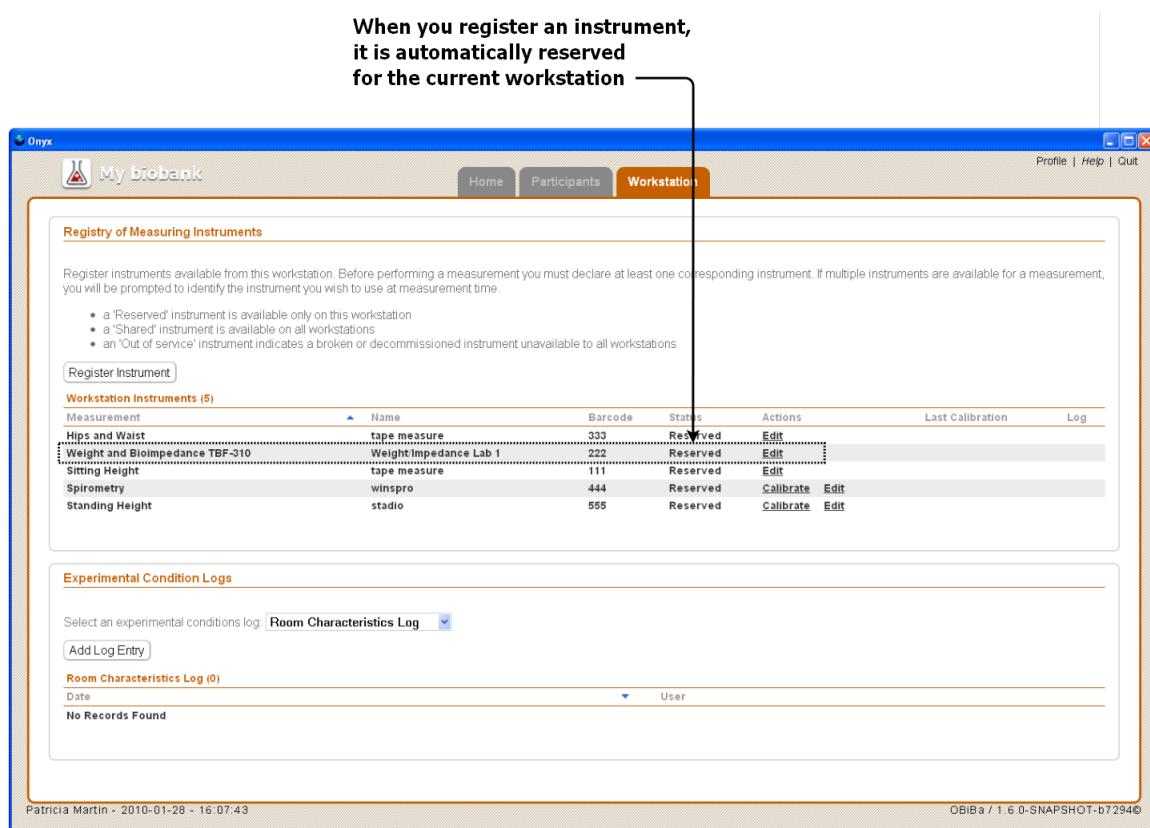


Figure 10.5. After you register an instrument, it appears in the Workstation page



Registering an Instrument for Additional Measurements

A particular instrument can be used for several types of measurement. For example, a tape measure could be used to measure waist and hips in one stage and to measure arm circumference in another stage. If an instrument has already been registered for one type of measurement, you can register it for additional measurements as explained in this section. When you scan or enter the barcode of the instrument, Onyx will recognize that it was already registered.

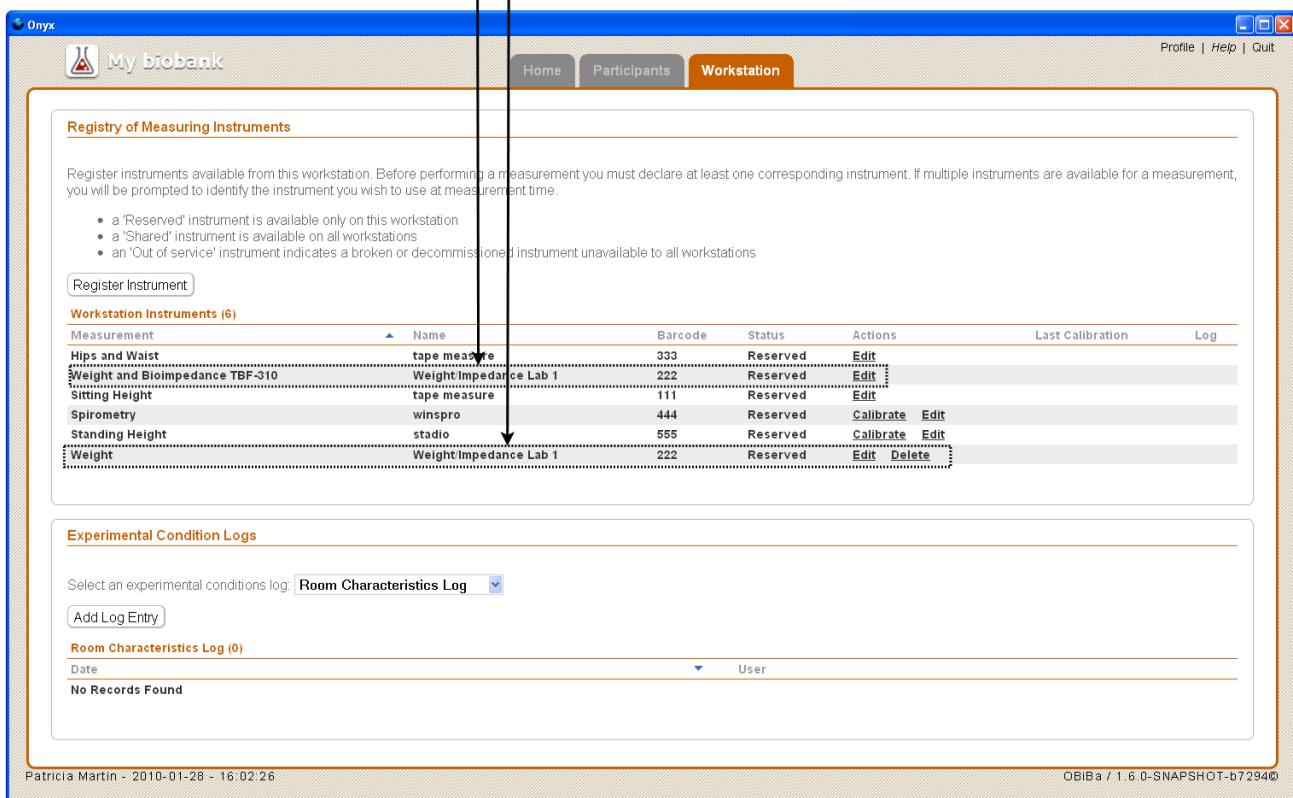
Procedure

1. If the **Workstation** page (see [Figure 10.1 \(page 103\)](#)) is not displayed, select the **Workstation** tab to display it.
2. Select the **Register Instrument** button. The **Register Instrument** dialog is displayed. See [Figure 10.2 \(page 107\)](#).
3. Select the arrow beside the **Measurement** field and select the type of measurement for which the instrument is used. See [Figure 10.3 \(page 107\)](#).

4. Complete the **Barcode** field by scanning the barcode on the instrument or by entering the value manually.
5. Use the mouse or tab key to select the **Name** field. When you do this, the remaining fields are filled in automatically with the values previously registered for the instrument. You cannot edit the values.
6. Check the information to confirm that it is the correct instrument.
7. If you decide not to register the instrument, select the **Cancel** button.
8. If you want to register the instrument, select the **Register** button. The **Register Instrument** dialog closes and a row for the new measurement appears in the list on the **Workstation** page. See [Figure 10.6 \(page 110\)](#)

If an instrument is already registered for one measurement

you can register it for additional measurements



The screenshot shows the 'My Biobank' application window. At the top, there's a menu bar with 'Profile | Help | Quit'. Below the menu is a navigation bar with tabs: 'Home' (selected), 'Participants', and 'Workstation' (highlighted in orange). The main content area is titled 'Registry of Measuring Instruments'. It contains a descriptive text about registering instruments and a table of 'Workstation Instruments (6)'. The table has columns for Measurement, Name, Barcode, Status, Actions, Last Calibration, and Log. The 'Actions' column includes 'Edit', 'Calibrate', and 'Delete' buttons. An arrow from the 'you can register it for additional measurements' callout points to the 'Edit' button for the 'Weight:Impedance Lab 1' entry. Another arrow from the 'If an instrument is already registered for one measurement' callout points to the same 'Edit' button. Below the table, there's a section for 'Experimental Condition Logs' with a dropdown menu set to 'Room Characteristics Log'. At the bottom of the window, there's a footer with the date 'Patricia Martin - 2010-01-28 - 16:02:26' and the version 'OBIBa / 1.6.0-SNAPSHOT-b729a©'.

Measurement	Name	Barcode	Status	Actions	Last Calibration	Log
Hips and Waist	tape measure	333	Reserved	Edit		
Weight and Bioimpedance TBF-310	Weight:Impedance Lab 1	222	Reserved	Edit		
Sitting Height	tape measure	111	Reserved	Edit		
Spirometry	winspro	444	Reserved	Calibrate Edit		
Standing Height	stadio	555	Reserved	Calibrate Edit		
Weight	Weight:Impedance Lab 1	222	Reserved	Edit Delete		

Figure 10.6. After you register an instrument for an additional type of measurement, an extra row for it is added to the instrument list



Setting the Status of an Instrument

When an instrument is registered, its status is automatically set to [Reserved \(page 105\)](#) for the workstation on which you registered it. You may need to change an instrument's status as explained in this section for one of these reasons:

- If the instrument will be used with several workstations, you need to set its status to [Shared \(page 105\)](#) on each of the workstations.
- If the instrument is defective or cannot be used for some reason, you need to set its status to [Out of service \(page 105\)](#).
- If an instrument was [Out of service \(page 105\)](#) and is now ready to be put back in service, you need to set its status back to whatever it was before being taken out of service (either: [Reserved \(page 105\)](#) or [Shared \(page 105\)](#)).
- If a shared instrument will now be used with just one workstation, you only need to set its status to [Reserved \(page 105\)](#) on that workstation (the instrument will automatically be removed from the other workstations with which it had been shared).

Prerequisites

To set an instrument's status on a particular workstation, the instrument must have been registered on that workstation, or its current status must be [Shared \(page 105\)](#) or [Out of Service \(page 105\)](#).

Procedure

1. If the **Workstation** page (see [Figure 10.1 \(page 103\)](#)) is not displayed, select the **Workstation** tab to display it.
2. Select the **Edit** link for the instrument whose status you want to change. The **Edit Instrument** dialog is displayed.

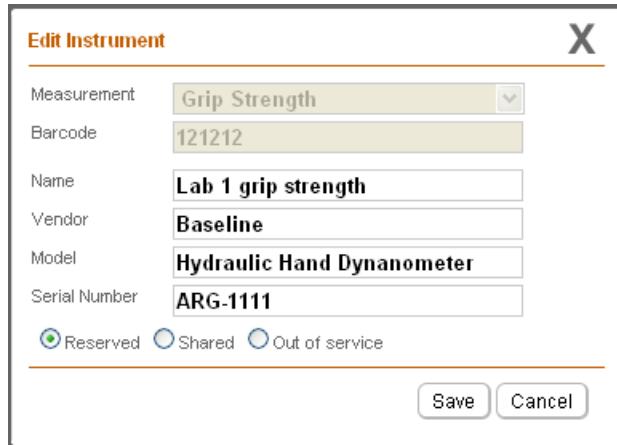


Figure 10.7. The Edit Instrument dialog

3. Select the status you want to change to (**Reserved**, **Shared** or **Out of service**).
4. Click the **Save** button. The **Edit Instrument** dialog is closed and the **Workstation** page is redisplayed with the status changed to the value you just selected. See [Figure 10.8 \(page 113\)](#)

If you changed the status to **Shared** or **Out of Service**, the next time you look at the **Workstation** page on any of the other workstations on the site, that status will be displayed.

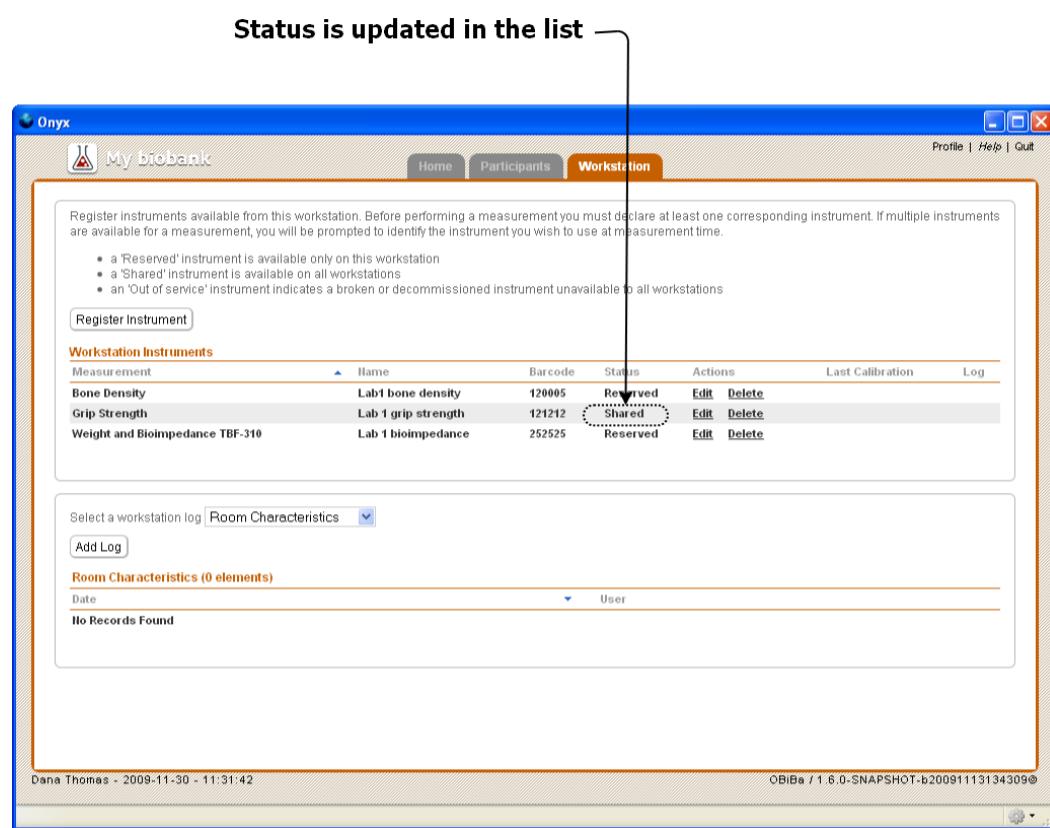


Figure 10.8. After you change an instrument's status, the Workstation page is updated

Editing Instrument Information

If you need to change any of the optional information that is stored for an instrument (name, vendor, model, serial number, status), you can do so as explained in this section.

You cannot change the barcode of an instrument after it has been registered. If the barcode is incorrect, you must delete the instrument (as explained in [Deleting an Instrument \(page 114\)](#)) and register it again (as explained in [Registering an Instrument \(page 105\)](#)).

Prerequisites

To change the information stored for an instrument for a particular workstation, the instrument must have been registered on that workstation, or its current status must be [Shared \(page 105\)](#) or [Out of Service \(page 105\)](#).

Procedure

1. If the **Workstation** page (see [Figure 10.1 \(page 103\)](#)) is not displayed, select the **Workstation** tab to display it.
2. Select the **Edit** link for the instrument whose information you want to change. The **Edit Instrument** dialog is displayed. See [Figure 10.7 \(page 112\)](#).
3. Change the values as necessary in any of the optional fields (**Name**, **Vendor**, **Model** and **Serial Number**). If you need help completing these fields, see [Prerequisites \(page 106\)](#).



Deleting a Measurement Type for an Instrument

If no measurements of a particular type were performed for an instrument, you can delete that measurement type for the instrument. The **Delete** link is only available if no measurements of that type were performed. See [Figure 10.9 \(page 115\)](#). The study must keep information about any instrument that was actually used to acquire data. Deleting an instrument/measurement combination removes it from the list in **Workstation** page, as well as deleting its calibration log. The instrument itself is only deleted from the Onyx database when it is no longer associated with any measurement types.

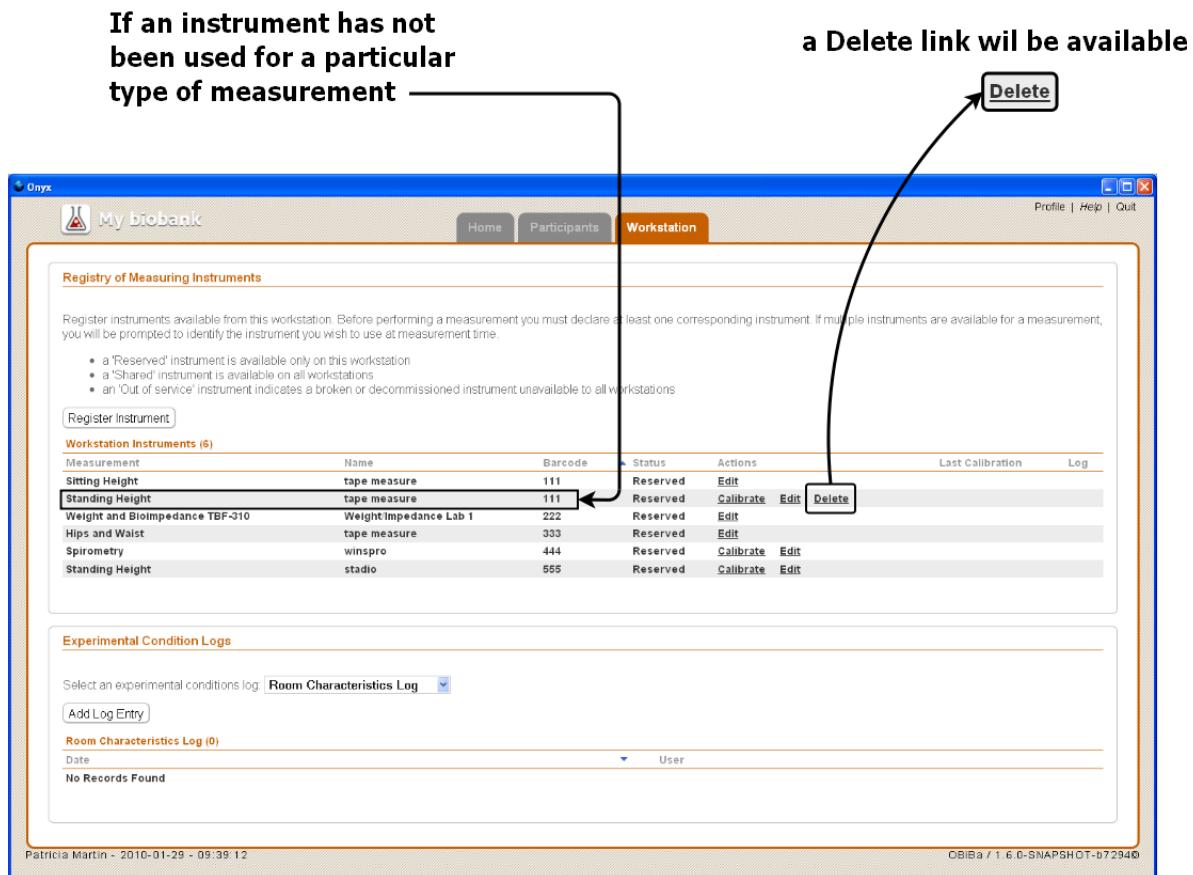


Figure 10.9. You can delete a type of measurement for an instrument, if no measurements of that type have been made

Procedure

1. If the **Workstation** page (see [Figure 10.1 \(page 103\)](#)) is not displayed, select the **Workstation** tab to display it.
2. Select the **Delete** link for the instrument/measurement that you need to delete. A dialog is displayed asking you to confirm that you want to delete.
3. Select **Yes** to confirm that you want to delete the instrument/measurement. The dialog closes and the **Workstation** page is visible again—the row for the instrument/measurement combination you just deleted has been removed from the instrument list.



Calibrating an Instrument

The [instruments](#) (page 104) used for physical measurements may require calibration. Some instruments can be calibrated through their own software. Others must be

calibrated manually. Onyx supports automated and manual calibrations, and allows each study to define custom calibration procedures for the instruments they use.



Instrument calibration is a customizable feature of Onyx. If a calibration procedure has been defined for an instrument associated with a workstation, a **Calibrate** link will be available for that instrument in the **Workstation** page.

If your study has defined a calibration procedure for an instrument, a Calibrate link will be displayed for it

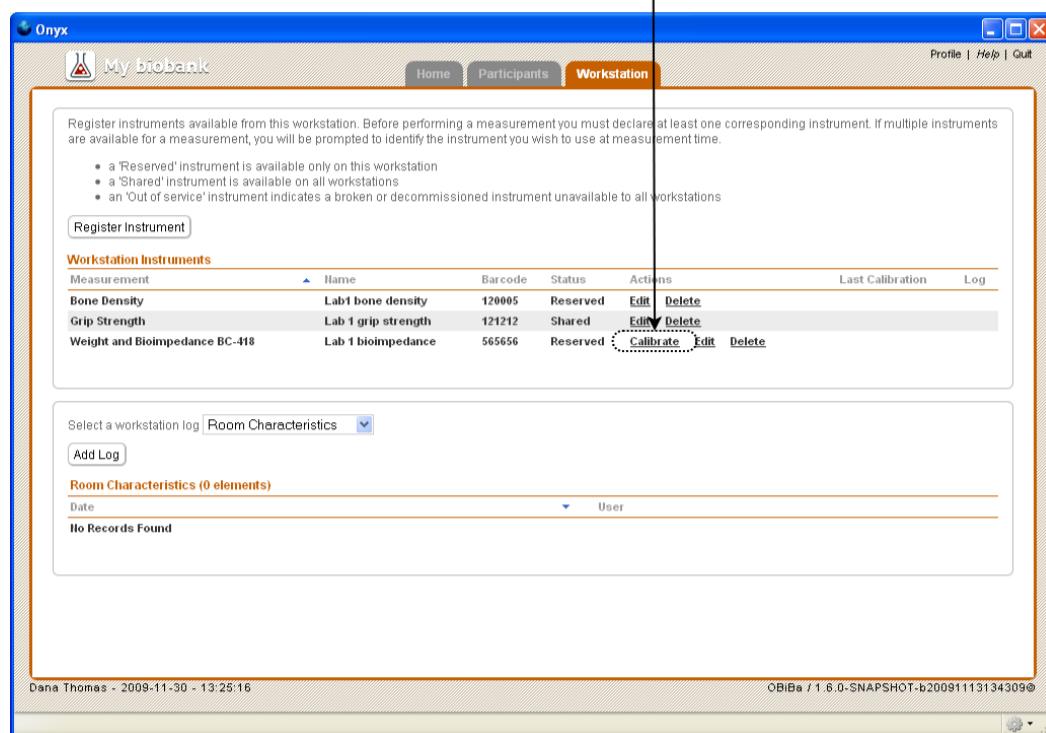


Figure 10.10. Instrument calibration is managed in the Workstation page

Prerequisites

- Your study must have defined a calibration procedure for the instrument you want to calibrate.
- Since Onyx does not schedule instrument calibrations, you must know the instrument calibration schedule for your site.

Procedure

1. If the **Workstation** page (see [Figure 10.10 \(page 116\)](#)) is not displayed, select the **Workstation** tab to display it.

2. Select the **Calibrate** link for the instrument that you want to calibrate. A calibration dialog is displayed. [Figure 10.11 \(page 117\)](#) shows an example of a calibration dialog.

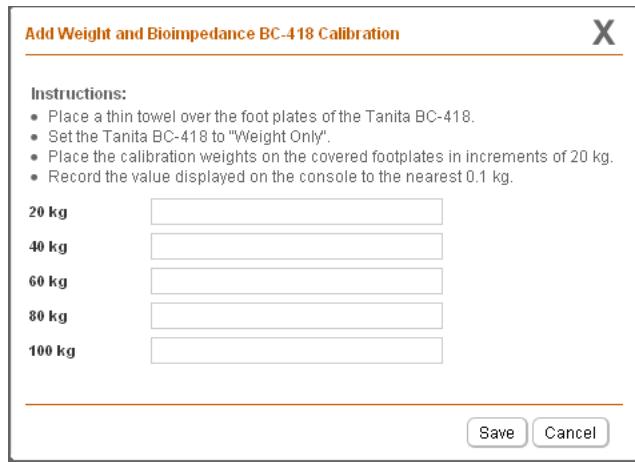


Figure 10.11. An example of an instrument calibration dialog

3. Follow the directions in the calibration dialog box.
4. If you don't want to save the calibration data, select the **Cancel** button. The calibration dialog is closed and the **Workstation** page is visible again unchanged.
5. If you want to save the calibration data, select the **Save** button. The calibration dialog is closed and the **Workstation** page is visible. Today's date appears in the **Latest Calibration** column and an icon is displayed in the **Log** column. See [Figure 10.12 \(page 118\)](#)

A magnifying glass icon indicates that a calibration log is available for the instrument

Date of latest calibration

The screenshot shows the 'Workstation' tab selected in the Onyx interface. A table lists three instruments:

Measurement	Name	Barcode	Status	Actions	Last Calibration	Log
Bone Density	Lab1 bone density	120005	Reserved	Edit Delete		
Grip Strength	Lab 1 grip strength	121212	Shared	Edit Delete		
Weight and Bioimpedance BC-418	Lab 1 bioimpedance	565656	Reserved	Calibrate Edit Delete	2009-11-30 14:51	

Below the table, there is a section for 'Room Characteristics' with a dropdown menu and a 'Add Log' button. The footer of the window displays the date and time (Dana Thomas - 2009-11-30 - 13:25:16) and the software version (OBiBa / 1.6.0-SNAPSHOT-b20091113134309@).

Figure 10.12. After you calibrate an instrument, the Workstation page is updated



Viewing the Calibration Log for an Instrument

If an instrument can be calibrated, you can view a log of all the calibrations that have been done for it. A magnifying glass icon at the end of the row for an instrument in the **Workstation** page indicates that a calibration log is available for the instrument. See [Figure 10.12 \(page 118\)](#).

Prerequisites

Your study must have defined a calibration procedure for the instrument you want to calibrate. At least one calibration must have been done.

Procedure

1. If the **Workstation** page (see [Figure 10.12 \(page 118\)](#)) is not displayed, select the **Workstation** tab to display it.
2. Select the  icon (the magnifying glass icon) for the instrument whose log you want to view. The **Calibration History** dialog is displayed. See [Figure 10.13 \(page 119\)](#).

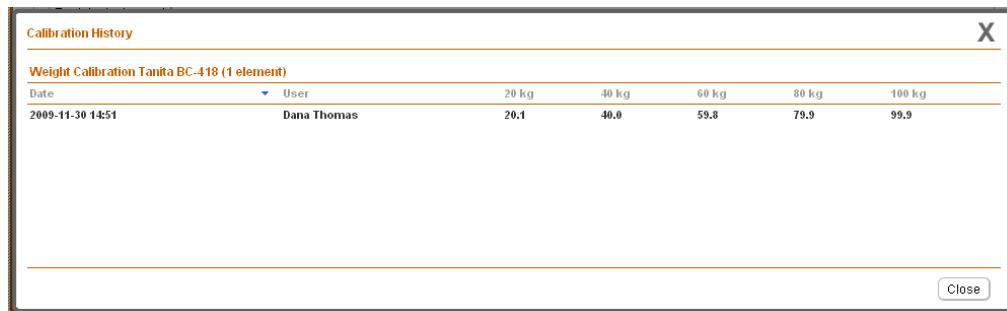


Figure 10.13. The Calibration History dialog

3. Select the **Close** button or the  button to close the dialog.



Logging Experimental Conditions

Onyx allows studies to log experimental conditions. These logs are used to capture any conditions that the study may wish to define, for example: room temperature and relative humidity.



Experimental condition logs are a customizable feature of Onyx. If your study has defined experimental conditions that it wants to log, the **Workstation** page will include an Experimental condition log section as shown in [Figure 10.14 \(page 120\)](#). If the study has not defined any logs, the lower half of the **Workstation** page will be empty.

Managing an Onyx Workstation

The screenshot shows the 'Workstation' tab selected in the top navigation bar. The main content area is titled 'Registry of Measuring Instruments'. It contains a note about instrument availability and three items in the list:

Measurement	Name	Barcode	Status	Actions	Last Calibration	Log
Weight and Bioimpedance TBF-310	1		Reserved	Edit Delete		
Weight and Bioimpedance BC-418	1		Reserved	Calibrate Edit Delete		
Standing Height	1		Reserved	Calibrate Edit		

Below this is the 'Experimental Conditions Log section of the page'. It has a title 'Experimental Condition Logs' and a dropdown menu 'Select an experimental conditions log: Room Characteristics Log'. A button 'Add Log Entry' is visible. A table titled 'Room Characteristics Log (16)' shows log entries:

Date	User	Temperature (°C)	Relative Humidity (%)
2010-01-21 12:58	The Onyx Administrator	12	12
2010-01-21 12:52	The Onyx Administrator	12	12
2010-01-21 12:26	The Onyx Administrator	12	12
2010-01-21 12:19	The Onyx Administrator	12	12
2010-01-21 12:18	The Onyx Administrator	12	12

The bottom status bar indicates 'The Onyx Administrator - 2010-01-25 - 13:47:42' and 'OBIBa / 1.6.0-SNAPSHOT-b7215®'.

Figure 10.14. Experimental condition logs are displayed in the Workstation page

Prerequisites

- Your study has defined at least one experimental condition log.
- Since Onyx does not schedule log entries, you must know when entries are supposed to be made for each experimental condition log defined for your study. For example: weather conditions should be logged every morning, and room conditions should be logged once a week, and so on.

Procedure

1. If the **Workstation** page (see [Figure 10.14 \(page 120\)](#)) is not displayed, select the **Workstation** tab to display it.
2. If your study has defined more than one log, select the log you want from the list labelled **Select a workstation log**. If the log you selected already contains some entries, they are displayed near the bottom of the **Workstation** page.
3. Select the **Add Log Entry** button. A customized dialog for entering log data is displayed. See the example in [Figure 10.15 \(page 121\)](#).

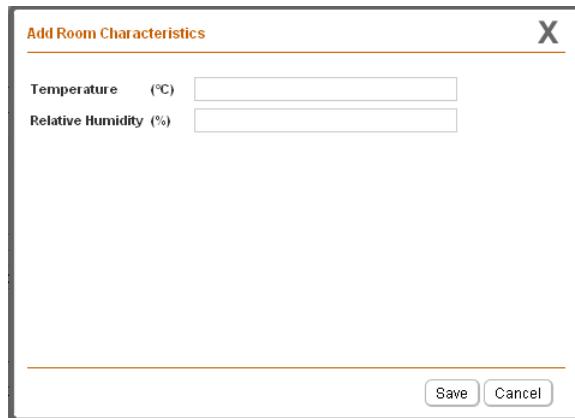


Figure 10.15. Example of a dialog for entering experimental conditions

4. Complete the fields in the dialog box.
5. If you don't want to save the log entry, select the **Cancel** button. The dialog is closed and the **Workstation** page is visible again unchanged.
6. If you want to save the log entry, select the **Save** button. The dialog is closed and the **Workstation** page is visible. The new log entry appears at the top of the list of entries at the bottom of the page. See [Figure 10.16 \(page 121\)](#).

The screenshot shows the "My Biobank" application window with the "Workstation" tab selected. A callout box points to the "Log" section of the interface with the text "New log entry is added at the top of the log". The "Workstation Instruments" table lists three instruments: Bone Density, Grip Strength, and Weight and Bioimpedance BC-418, each with status (Reserved or Shared), actions (Edit, Delete), and last calibration information. Below this is a "Room Characteristics" log table with three entries:

Date	User	Temperature (°C)	Relative Humidity (%)
2009-12-02 10:34	Dana Thomas	15	44
2009-12-01 09:49	Dana Thomas	18	44
2009-11-30 15:50	The Onyx Administrator	20	45

Figure 10.16. After you add an entry to an experimental condition log, the Workstation page is updated



Viewing Experimental Condition Log

Onyx allows studies to log experimental conditions. These logs can capture any conditions that a study may wish to define, for example: room temperature and relative humidity.



Experimental condition logs are a customizable feature of Onyx. If your study has defined experimental conditions that it wants to log, the **Workstation** page will include an Experimental condition log section as shown in [Figure 10.14 \(page 120\)](#). If the study has not defined any logs, the lower half of the **Workstation** page will be empty.

Prerequisites

Your study has defined at least one experimental condition log.

Procedure

1. If the **Workstation** page (see [Figure 10.14 \(page 120\)](#)) is not displayed, select the **Workstation** tab to display it.
2. If your study has defined more than one log, select the log you want from the list labelled **Select a workstation log**. The log is displayed at the bottom of the **Workstation** page. Log entries are displayed in reverse chronological order with the most recent entry at the top. See [Figure 10.17 \(page 123\)](#)

Managing an Onyx Workstation

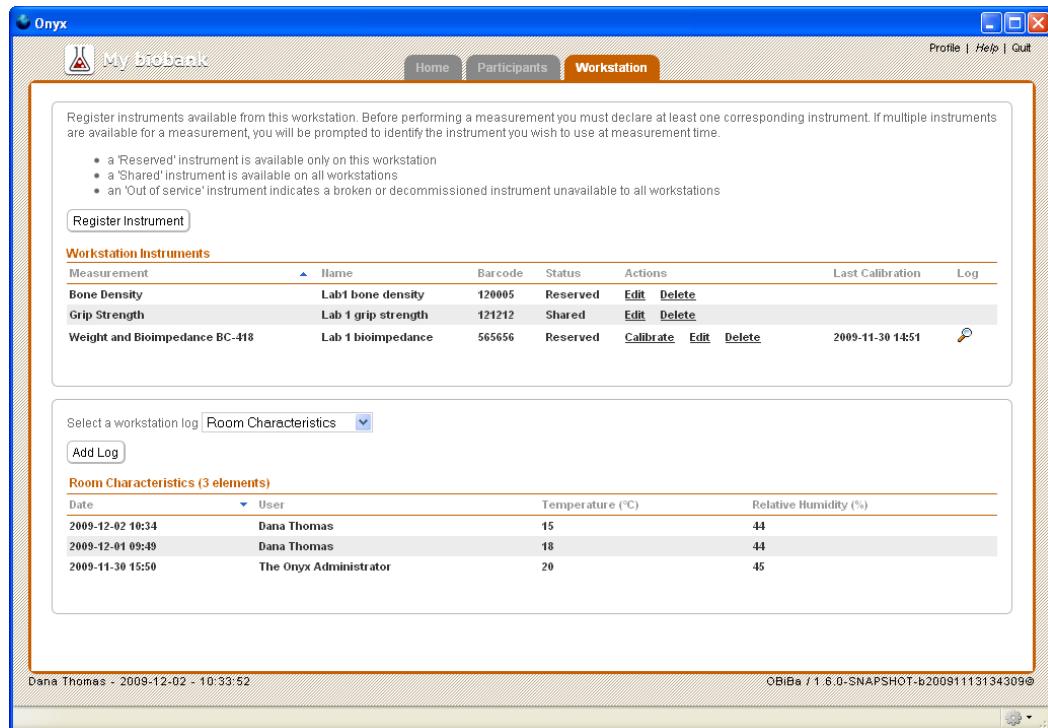


Figure 10.17. You view experimental condition logs in the Workstation page

Chapter 11. Creating and Editing Questionnaires

This chapter covers creating and editing questionnaires. Typically, this work is done by researchers. To create and edit questionnaires, you must have been assigned the user role of Questionnaire Editor. See [User Roles \(page 164\)](#).

This chapter covers:

- Key concepts related to creating and editing questionnaires
- Procedures for creating and editing questionnaires

Key Concepts

This section contains concepts related to creating and editing questionnaires.

Questionnaire

A questionnaire is a set of questions and the possible responses associated with each question. A questionnaire can be used as a stage in an interview. The questions can be of different types. A questionnaire is stored in an XML file that defines the structure of the questionnaire and includes information about how the questions will be displayed onscreen. Questionnaires can be downloaded. The XML file that defines the questionnaire and the properties files that contain the labels (one per display language) are output to a zip file. They can also be uploaded: a zip file containing the XML file and properties files for a questionnaire is decompressed, and the questionnaire is opened in Onyx.

Section

A section is used to group questions by topic. A questionnaire must have at least one section. See [Adding a Section \(page 131\)](#).

Page

A page is used to group questions on the same screen. A section must have at least one page. See [Adding a Page \(page 131\)](#).

Question Types

A question is used to ask the participant for some information or to present some information. Several types of question are available. See the [table \(page 126\)](#) for descriptions of the question types.

Table 11.1. Question Types

Instruction	A general instruction or explanatory text about a section or a page. See Adding an Instruction (page 132) .
Single open answer	A question that the participant responds to by supplying an answer rather than by selecting a category. The participant's answer is entered in a field. The answer has a data type (). Optionally, a list of possible values can be displayed for the participant to choose from. See Adding Single Open Answer Questions (page 133) .
List (radio buttons)	An exclusive choice question whose categories are displayed as radio buttons. The participant can only choose one category. See Adding a List Question (page 133) .
List (drop-down)	An exclusive choice question whose categories are displayed in a drop-down list. The participant can only choose one category. See Adding a List Question (page 133) .
List (checkbox)	A multiple choice question whose categories are displayed with checkboxes so the participant can select all categories that apply. The participant can select several categories. See Adding a List Question (page 133) .
Array (radio buttons)	An array question includes several child questions. The child questions automatically share the categories of the parent question. Using radio buttons forces the participant to choose only one category for each child question. The array is displayed as a table in which the rows are questions and the columns are categories. See Adding an Array Question (page 137) .
Array (checkbox)	An array question includes several child questions. The child questions automatically share the categories of the parent question. Using checkboxes allows the participant to select all the categories that apply. The array is displayed as a table in which the rows are questions and the columns are categories. See Adding an Array Question (page 137)

Category

A category is one of the possible answers to a question that are proposed to the participant. Unlike an [open answer \(page 127\)](#), a category does not have a data type. See [Defining Categories \(page 141\)](#).

Open Answer

An open-answer question requires the participant to supply an answer rather than select a category. An open answer question has a data type (date, decimal, integer, or text). The participant's answer is usually entered in a field. Optionally, a list of possible answers can be displayed for the participant to choose from.

An open answer field can also be added to a category. This allows further information to be stored with the category. For example, if a category is "Other", an open answer would allow the participant to be more precise.

See [Adding Single Open Answer Questions\(page 133\)](#) and [Adding an Open Answer to a Category \(page 141\)](#).

Condition

You can add one or more conditions to a question to control whether the question will be displayed or skipped. See [Adding Conditions to a Question \(page 144\)](#).

Variable

Variables store discrete bits of data relevant for a study. A variable is automatically created for each question added to a questionnaire. You can create additional variables explicitly. See [Adding a Variable \(page 145\)](#) Onyx has predefined variables for participant identification information. Variables can be included in conditions and in validators for open answers.

When Onyx automatically creates a variable for a question, it generates a fully qualified name for the variable, meaning the name includes prefixes for the section and page, as well as the question name. You can change these generated names to make them shorter or more relevant for analysis.

Script

A script is a list of one or more commands that are evaluated as you build your questionnaire or when the questionnaire is being completed. A script is always associated

Creating and Editing Questionnaires

with a variable. You write scripts when you create a custom variable, add conditions to a question, and define validators for open answers.

Scripts are written using Javascript syntax and the Magma API (Application Programming Interface). For more information see the [Magma API documentation](#) [<http://wiki.obiba.org/confluence/display/OPALDOC/Magma+Javascript+API>].

Procedures

This section contains procedures for creating questionnaires and adding all the components necessary to make them fully functional, as well as the procedure for putting them online in Onyx.

To carry out the procedures in this section, you must have been assigned the user role of Questionnaire Editor. See [User Roles \(page 164\)](#).



Accessing the Questionnaires Page

You create and edit questionnaires starting from the **Questionnaires** tab of the Onyx **Administration** page. See [Figure 11.1 \(page 128\)](#) You access the **Questionnaires** tab as explained here.

The screenshot shows the Onyx Administration interface with the 'Questionnaires' tab selected. The page title is 'cisa élcv'. The navigation bar includes 'Home' and 'Participants'. The main content area has tabs for 'Users', 'Data', and 'Questionnaires'. Below the tabs, there's a 'Questionnaires' section with a sub-section 'Questionnaires (5 entries)'. A table lists five questionnaires:

Name	Version	Language(s)	Edit	Upload	Validate	Download	HTML preview
ChronicConditions	1.0	English	Edit	Upload	Validate	Download	HTML preview
foodquestionnaire	1.0	English	Edit	Upload	Validate	Download	HTML preview
NeuropsychologicalBattery	1.0	English	Edit	Upload	Validate	Download	HTML preview
sleepQuestionnaire	1.0	English, French	Edit	Upload	Validate	Download	HTML preview
ConclusionQuestionnaire	1.0	English	Edit	Upload	Validate	Download	HTML preview

Annotations on the screenshot:

- A callout labeled 'List of existing questionnaires' points to the table header.
- A callout labeled 'Actions available for individual questionnaires' points to the first column of the table.
- An arrow labeled 'Click here to create a new questionnaire' points to the 'Create new questionnaire' button at the bottom left of the table.
- An arrow labeled 'Click a questionnaire's Edit link to open it in the questionnaire editor' points to the 'Edit' link in the first row of the table.

Figure 11.1. The Questionnaires tab of the Adminstration page

Procedure

1. Log in to the Onyx. See [How to log in \(page 10\)](#).
2. Select the **Administration** link in the upper right corner of any Onyx page. By default, the administration page opens on the **User** tab.
If you do not see the **Administration** link in the upper right corner of the page, ask the system administrator to assign you the user role of [Questionnaire Editor \(page 5\)](#).
3. Select the **Questionnaires** tab. The list of existing questionnaires is displayed.



Creating a New Questionnaire

Before creating a questionnaire, you should probably know the display languages for your questionnaire (for example, English and French) and be ready to provide text in each of those languages for labels that will be displayed throughout the questionnaire. If necessary, more display languages can be added later.

Procedure

This procedure assumes you are in the **Questionnaires** tab of the Onyx **Administration** page. You can access it as explained in [Accessing the Questionnaires Page \(page 128\)](#).

1. Click the **Create new questionnaire** button. The **New questionnaire** page pops up.
2. Enter a **Name** for your questionnaire.
3. Enter a **Version** for your questionnaire.
4. Select a **Display mode**:
 - **Standard** - the type of screen used with desktop computers or the screen of a laptop computer. You select onscreen objects with a mouse or a touchpad.
 - **Touch-screen** - allows you to select buttons and other onscreen objects by touching them with a finger.
5. Select one or more **Languages** for the questionnaire interface. A tab is displayed for each of the languages you selected.
6. Complete all of the fields on each language tab with text in the appropriate language:
 - **label**: The title of the questionnaire that will be displayed. Required.

- **description:** A brief description of the questionnaire (in the selected language). Optional.

- In the rest of the fields on this page (**labelNext**, **labelPrevious**, and so on), enter labels (in the selected display language) for the navigation buttons that will appear throughout the questionnaire.

If these fields are not completed, the default English text will be used.

7. Click the **Save** button. The questionnaire editor pops up with the name of your questionnaire on the left side and help text on the right side.

Before adding questions to your new questionnaire, you must add a section and a page to it. See [Adding a Section \(page 131\)](#) and [Adding a Page \(page 131\)](#).



Editing a Questionnaire

You edit questionnaires in a page called the questionnaire editor. See [Figure 11.2 \(page 130\)](#). You open an existing questionnaire in the questionnaire editor as explained here.

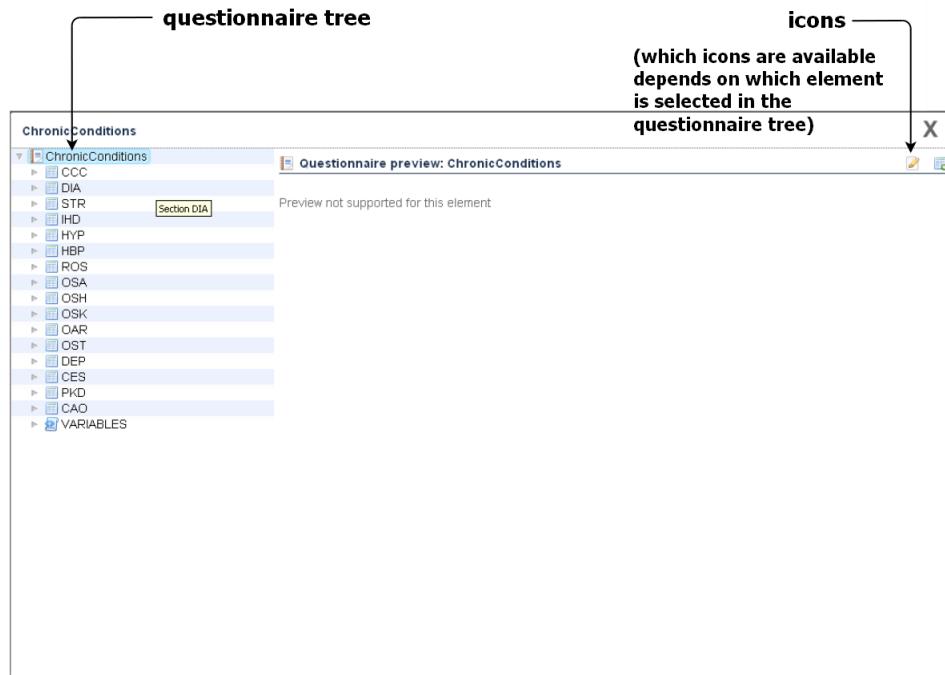


Figure 11.2. The questionnaire editor

1. If the list of questionnaires is not displayed, access it as explained in [Accessing the Questionnaires Page \(page 128\)](#).

2. Click the **Edit** link for the questionnaire you wish to edit. The questionnaire editor pops up. A tree representing the structure of the questionnaire is displayed in the left panel. Initially, a help page is displayed in the right panel.
3. To start editing the questionnaire, click the name of the the questionnaire (at the top of the tree). The help page is removed, and some icons are displayed near the top right corner of the editor page. The icons displayed depend on which element is selected in the questionnaire tree.



Adding a Section

The questions in a questionnaire can be grouped into sections by topic. Even if you do not want to or need to group questions by topic, you must add at least one section to your questionnaire as explained in this procedure.

If you want to use subsections, you can do so by adding sections to sections.

Before you can add questions to a section, you must add a page to it as explained in [Adding a Page to a Section \(page 131\)](#).

Procedure

This procedure assumes the questionnaire is displayed in the questionnaire editor. To open a questionnaire in the questionnaire editor, see [Editing a questionnaire \(page 130\)](#).

1. To add a top-level section to your questionnaire, select the name of your questionnaire in the tree on the left.
2. To add a subsection to an existing section, open the questionnaire tree and select the section to which you want to add a subsection.
3. Click the **Add Section** icon in the upper right corner of the dialog. Fields for entering section properties are displayed in the right panel.
4. Enter a name for the section. This name is used internally and will not be displayed.
5. Enter a label for the section in each of the language tabs. This label will be displayed so the text must be in the appropriate display language.
6. Click the **Save** button. The new section is added to the questionnaire tree.



Adding a Page

Questions can be grouped into pages to ensure they will appear on the same screen. You can also use pages to ensure that only one question is displayed per screen. Even if you

do not care how many questions are displayed per screen, you must add at least one page to each section of your questionnaire as explained in this procedure. After adding a page, you can select it and add questions to it.

Procedure

This procedure assumes the questionnaire is displayed in the questionnaire editor. To open a questionnaire in the questionnaire editor, see [Editing a questionnaire \(page 130\)](#).

1. Open the tree for your questionnaire until you find the section to which you want to add a page.
2. Click the **Add Page** icon in the upper right corner of the dialog. Fields for entering page properties are displayed in the right panel.
3. Enter a name for the page. This name is used internally and will not be displayed.
4. Enter a label for the page in each of the language tabs. This label will be displayed so the text must be in the appropriate display language.
5. Click the **Save** button (at the bottom of the page—you may have to scroll down).



Adding an Instruction

You can add directions to users before and between questions with a special type of question called an [instruction \(page 126\)](#). It is simply text.

Procedure

This procedure assumes the questionnaire is displayed in the questionnaire editor. To open a questionnaire in the questionnaire editor, see [Editing a questionnaire \(page 130\)](#).

1. Open the tree for your questionnaire until you find the section and page in which you want to add the instruction.
2. Click the **Add Question** icon in the upper right corner of the dialog.
3. Enter a name for the instruction in the **Name** field. This name is used internally and will not be displayed.
4. Select **Instruction** in the **Type** field.
5. For each language, enter the actual instruction in the **label** field.

6. Click the **Save** button.



Adding a Single Open Answer Question

A single open answer question displays the question label and a single field in which to enter the participant's response. An open answer has a data type (date, decimal, integer, or text).

As an option, you can define a drop-down list of possible values that the participant can choose from. The answer selected is stored as a value with a data type. This is different from a [List question \(page 126\)](#) that displays a drop-down list, in which case the participant's selection is stored as a category and does not have a data type.

Procedure

This procedure assumes the questionnaire is displayed in the questionnaire editor. To open a questionnaire in the questionnaire editor, see [Editing a questionnaire \(page 130\)](#).

1. Open the tree for your questionnaire until you find the section and page in which you want to add the question.
2. Click the **Add Question** icon in the upper right corner of the dialog. Fields for entering question properties are displayed in the right panel.
3. Enter a name for the question in the **Name** field. This name is used internally and will not be displayed.
4. If you wish, enter a custom name for the variable associated with the question in the **Variable** field. This variable name is used internally and will not be displayed.
5. Select **Single open answer** in the **Type** field.
6. In each of the language tabs, enter the text that will appear onscreen in the appropriate language. For more information, see [Entering Language Properties for a Question \(page 140\)](#).
7. Click the **Save** button.



Adding a List Question

List questions are used for questions that have a set of categories as possible answers. Three types of list question are available:

- **Radio button list.** Exclusive choice question (participant can select only one category), suitable for a small number of categories. The categories can be displayed in different layouts (default, single column or grid).
- **Drop-down list.** Exclusive choice question (participant can select only one category), suitable for a large number of categories.
- **Checkbox list.** Multiple choice question (participant can select several categories). The categories can be displayed in different layouts (default, single column or grid), whichever is most suitable for the number of categories.

You can add categories to a list question one at a time or add several categories at once. You can also add existing categories (categories defined for another question) to a list question.

You can obtain more detail from a participant who selected a particular category by adding an open answer to the category. See [Adding an Open Answer to a Category \(page 141\)](#).

After defining a list question, you can change the question type to another type of list question if necessary.

Procedure for adding a list question

This procedure assumes the questionnaire is displayed in the questionnaire editor. To open a questionnaire in the questionnaire editor, see [Editing a questionnaire \(page 130\)](#).

1. Open the tree for your questionnaire until you find the section and page in which you want to add the question.
2. Click the **Add Question** icon in the upper right corner of the editor. Fields for entering question properties are displayed in the right panel.
3. Enter a name for the question in the **Name** field. This name is used internally and will not be displayed.
4. If you wish, enter a custom name for the variable associated with the question in the **Variable** field. This variable name is used internally and will not be displayed.
5. Select the question type that best suits your needs from the list in the **Type** field:
 - **List (radio)** - for an exclusive choice question with a few categories
 - **List (drop-down)** - for an exclusive choice question with more than a few categories
 - **List (checkbox)** - for a multiple choice question

6. In each of the language tabs, enter the text (in the appropriate language) that will appear onscreen. For more information, see [Entering Language Properties for a Question \(page 140\)](#).
7. Click the **Categories** tab.
8. If you do want not to use the default layout (a grid with five rows) for categories, select another option in the **Layout** list. Here are some pointers:
 - For a checkbox list, you might want to select **Single column** since the default layout will use several columns if there are enough categories.
 - **Grid** layout is useful if you want to control how radio buttons or checkboxes are displayed in columns.
9. Add categories to the question. For detailed directions, see these procedures:
 - [Adding a Single Category to a List Question \(page 135\)](#)
 - [Adding Multiple Categories to a List Question \(page 136\)](#)
 - [Adding Existing Categories to a List Question \(page 136\)](#)
10. Complete the definition of the categories (adding labels and so on). See [Defining the Properties of a Category \(page 141\)](#).
11. Click the **Question** tab and enter the order in which you want the categories to be displayed in the **categoryOrder** field at the bottom of the editor. Enter the category names as a comma-separated list. For example: **category3,category2,category1**.
12. Click the **Save** button.

Procedure for adding a single category to a list question

This procedure assumes that your questionnaire is open in the questionnaire editor, that you are editing a particular list question, and that you are in the **Categories** tab for that question.

1. Select the **Simple add** tab.
2. Enter a name for the category in **New category** field.
3. Click the + button (to the right of the **New category** field). The category is added to the list of categories.
4. Repeat the last two steps if you want to add one more question. Or carry out the next procedure to add several questions at once.

5. Click the **Save** button.

If you wish, complete the definition of the categories (labels and so on) immediately. See [Defining the Properties of a Category \(page 141\)](#).

Procedure for adding multiple categories to a list question

This procedure assumes that your questionnaire is open in the questionnaire editor, that you are editing a particular list question, and that you are in the **Categories** tab for that question.

1. Click the **Multiple add** tab.
2. Enter a comma-separated list of names for the new categories in the **New categories** field. For example: category1,category2,category3.
3. Click the + button (to the right of the **New categories** field). The categories are added to the list of categories.
4. Click the **Save** button.

If you wish, complete the definition of the categories (labels and so on) immediately. See [Defining the Properties of a Category \(page 141\)](#).

Procedure for adding existing categories to a list question

This procedure assumes that your questionnaire is open in the questionnaire editor, that you are editing a particular list question, and that you are in the **Categories** tab for that question.

1. Click the **Add existing categories** tab.
2. Locate and select an existing category as follows:
 - Enter part or all of the name of an existing category in the **Category name** field. As you type, one or more existing categories will be displayed in a popup list.
 - When the category you are looking for appears in the popup list, move the cursor over it, and wait for the category to be highlighted in yellow.
 - Click in the name of the desired category. The name of the category is inserted in the **Category name** field.
3. Click the + button (to the right of the **Category name** field). The category is added to the list of categories.
4. Repeat the last two steps for each existing category that you want to add.

5. Click the **Save** button.



Adding an Array Question

Array questions are used for several questions that take the same set of categories. An array question is displayed as a table: the questions are displayed as rows, and the categories are displayed as columns. Use a radio button array list if only one category should be selected for each question. Use a checkbox array list if several categories can be selected for each question.

How often do you eat these meals?				
	never	seldom	often	always
breakfast	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
lunch	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
supper	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Figure 11.3. Example of an array question with radio buttons

Procedure for adding an array question

This procedure assumes the questionnaire is displayed in the questionnaire editor. To open a questionnaire in the questionnaire editor, see [Editing a questionnaire \(page 130\)](#).

1. Open the tree for your questionnaire until you find the section and page in which you want to add the question.
2. Click the **Add Question** icon in the upper right corner of the dialog. Fields for entering question properties are displayed in the right panel.
3. Enter a name for the question in the **Name** field. This name is used internally and will not be displayed.
4. If you wish, enter a custom name for the variable associated with the question in the **Variable** field. This variable name is used internally and will not be displayed.
5. Select the question type that best suits your needs from the list in the **Type** field:
 - **Array (radio)** - if participants can only select one category for each question
 - **Array (checkbox)** - if participants can select several categories for each question
6. In each of the language tabs, enter the text (in the appropriate language) that will appear onscreen. For more information, see [Entering Language Properties for a Question \(page 140\)](#).

7. At this point, you can add questions (rows) and categories (columns) to the array question. For detailed directions, see these procedures:
 - [Adding a Single Question \(Row\) to an Array Question \(page 138\)](#)
 - [Adding Multiple Questions to an Array Question \(page 138\)](#)
 - [Adding a Single Category to an Array Question \(page 139\)](#)
 - [Adding Multiple Categories to an Array Question \(page 139\)](#)
 - [Adding Existing Categories to an Array Question \(page 140\)](#)
8. Click the **Question** tab and enter the order in which you want the categories to be displayed in the **categoryOrder** field at the bottom of the dialog. Enter the category names as a comma-separated list. For example: **category1,category2,category3**.
9. Click the **Save** button.

Procedure for adding a single question (row) to an array question

This procedure assumes that you have opened your questionnaire in the questionnaire editor and that you are editing a particular array question.

1. Click the **Rows (questions)** tab.
2. Click the **Simple add** tab.
3. Enter a name for the question in the **New question** field.
4. Click the + button (to the right of the **New question** field). The question is added to the list of questions.
5. Repeat the last two steps if you want to add one more question. Or carry out the next procedure to add several questions at once.
6. If you wish, you can complete the definition of the categories immediately. See [Defining the Properties of a Category \(page 141\)](#).

Procedure for adding multiple questions (rows) to an array question

This procedure assumes that you have opened your questionnaire in the questionnaire editor and that you are editing a particular array question.

1. Click the **Rows (questions)** tab.
2. Click the **Multiple add** tab.

3. Enter comma-separated list of names for the questions in the **New questions** field. For example, **question1, question2,question3**.
4. Click the + button (to the right of the **New questions** field). The questions are added to the list of questions.
5. If you wish, complete the definition of the categories immediately. See [Defining the Properties of a Category \(page 141\)](#).

Procedure for adding a single category (column) to an array question

This procedure assumes that you have opened your questionnaire in the questionnaire editor and that you are editing a particular array question.

1. Click the **Columns (categories)** tab.
2. Click the **Simple add** tab.
3. Enter a name for the category in the **New category** field.
4. Click the + button (to the right of the **New category** field). The category is added to the list of categories.
5. Repeat the last two steps if you want to add one more category. Or carry out the next procedure to add several categories at once.
6. If you wish, you can complete the definition of the categories immediately. See [Defining the Properties of a Category \(page 141\)](#).

Procedure for adding multiple categories (columns) to an array question

This procedure assumes that you have opened your questionnaire in the questionnaire editor and that you are editing a particular array question.

1. Click the **Columns (categories)** tab.
2. Click the **Multiple add** tab.
3. Enter a comma-separated list of names for the categories in the **New categories** field.
4. Click the + button (to the right of the **New categories** field). The categories are added to the list of categories.
5. If you wish, you can complete the definition of the categories immediately. See [Defining the Properties of a Category \(page 141\)](#).

Procedure for adding existing categories to an array question

This procedure assumes that you have opened your questionnaire in the questionnaire editor and that you are editing a particular list question.

1. Click the **Columns (categories)** tab.
2. Click the **Add existing categories** tab.
3. Locate and select the category as follows:
 - Enter part or all of the name of an existing category in the **Category name** field. As you type, one or more existing categories will be displayed in a popup list.
 - When the category you are looking for appears in the popup list, move the cursor over it, and wait for the category to be highlighted in yellow.
 - Click in the name of desired category. The name of the category is inserted in the **Category name** field.
4. Click the + button (to the right of the **Category name** field). The category is added to the list of categories.

Repeat the above steps for each existing category that you want to add.



Defining Language Properties for a Question

The language properties for a question define the text that will be displayed when the questionnaire is being completed. The label is required. The other properties are optional.

Procedure

This procedure assumes the questionnaire is displayed in the questionnaire editor. To open a questionnaire in the questionnaire editor, see [Editing a questionnaire \(page 130\)](#).

1. If the **Language properties** of the questionnaire are not displayed, click the name of the questionnaire in the tree, and then click the **Edit** icon at the right side of the page.
2. In the **Language properties** panel, enter the actual question in the **label** field. This field is required. It is the text that will be displayed in the questionnaire.
3. Optionally, enter instructions to the participant in the **instructions** field. This text will be displayed just below the label.

4. Optionally, enter additional explanatory text in the **caption** field. This text will be displayed just below the instructions.
5. Optionally, enter help text in the **help** field. This text will be displayed if the user clicks the question mark button beside the label.
6. Optionally, enter additional explanatory text in the **specifications** field. This text will be displayed just below the field for entering the participant's response.
7. Click the **Save** button.



Defining the Properties of a Category

After you add categories to a list or array question, you must enter labels for them and can define a few other properties.

This procedure assumes that categories have already been added to the question and that the list of categories is displayed in the questionnaire editor.

Procedure

1. Click the edit icon for the category (at the right end of the row for the category).
2. For each language tab in the **Language properties** panel, enter text in the appropriate language in the **label** field.
3. If you wish, enter a custom name for the variable associated with the category in the **Variable** field. This variable name is used internally and will not be displayed.
4. Check the **Escape/missing** checkbox if the category represents an answer that means “Don’t know” or “Prefer not to answer”.
5. Check the **No answer** checkbox if the category represents an answer that means “Not applicable” (for example, a man’s answer to “Have you ever been pregnant?”).
6. If you wish, you can add an open answer field to the category (for example “Other, please specify”). See [Adding an Open Answer to a Category \(page 141\)](#).
7. Click the **Save** button.



Adding an Open Answer to a Category

You may wish to add an open answer to a category. For example, if the category is “Other”, you may want to allow the participant to be more specific. The participant's

response can be entered in a text field that has a data type (date, decimal, integer, or text). If a category

If you want to limit the values that the participant can enter for an open-answer, you can define a list of items that will be displayed in a drop-down list (for example, the days of the week). You can add the items one at a time in the “Single add” tab, or you can add several items at once in the “Multiple add” tab.

Procedure

This procedure assumes that the category has already been added to the question and that you are editing the category. If you need help getting to this point, see [Defining the Properties of a Category \(page 141\)](#).

1. Click the **Add open answer** button (in the lower left corner of the category editor).
2. Enter a name for the open answer in the **Name** field. This name is used internally and will not be displayed.
3. If you wish, enter a custom name for the variable associated with the open answer in the **Variable** field. This variable name is used internally and will not be displayed.
4. Select the appropriate type in the **Data type** dropdown list. The available types are **Date**, **Decimal**, **Integer**, and **Text**.
5. If the **Data type** you selected is numerical, you can enter a unit of measure in the **Unit** field.
6. If you want to specify the width of the field that will be displayed, you can enter a value in the **Field size** field.
7. If you want to define a drop-down list of items that the participant can choose from, add the list items as follows:
 - To add one item, select the **Single add** tab, enter a name for the item in the **New list item** field and click the + button (to the right of the **New list item** field).
 - To add several items at once, select the **Multiple add** tab, enter a comma-separated list of names for the items in the **New list items** field and click the + button (to the right of the **New list items** field).
 - Enter labels in the appropriate language for each tab in the **Language properties** panel.
8. If desired, you can validate open answers, you must define a validator. See [Validating Open Answers \(page 143\)](#).
9. Click the **Save** button.



Validating Open Answers

If you have defined an open answer, either in a single open-answer question or as an open answer field associated with a category, you can validate the value entered in the open-answer field. You can validate an open answer in one or more of these ways:

- Comparing the value entered to a pattern (written using [regular expression syntax](http://www.regular-expressions.info/reference.html) [<http://www.regular-expressions.info/reference.html>]).

Useful for text. For example, the first 3 characters of a postal code follows this pattern [a-zA-Z]\d[a-zA-Z] which means: "a letter" ([a-zA-Z]) then "a number" (\d) and then "a letter" ([a-zA-Z]).

- Defining fixed upper and/or lower limits
- Defining a validator which is essentially a script that compares the value entered to a variable or to an answer to a previous question

You can define an open answer validator for either type of open-answer element as explained in this section. In both cases, the **Open answer** definition is very similar, and the **Validation** panel is displayed near the bottom of the page.

Procedure

1. If you are adding a validator to a single open answer question, you can display the open-answer definition as follows:
 - Select the question in the questionnaire tree.
 - Click the **Edit question** icon.
 - Select the **Open answer** tab.
2. If you are adding a validator to an open answer field associated with a category, you can display the open-answer definition as follows:
 - Select the question in the questionnaire tree.
 - Click the **Edit question** icon.
 - Select the **Categories** tab.
 - Click the **Edit category** icon for the category that has an open answer associated with it.
 - Click the **Edit** icon for the open answer (near the bottom right of the page).

3. Scroll down to the **Validation** panel of the **Open answer** definition.
4. Check the **Required** checkbox. If you check this box, you must define the validation process as explained in the next three steps.
5. To validate the open answer by comparing it to a pattern, enter a regular expression in the **Pattern** field.
6. To set upper and/or lower limits, complete the appropriate fields (depending on the data type of the open answer, different fields are displayed):
 - **Before** and/or **After** (for data type **Date**; for US, the format is yyyy-MM-dd; for France, the format is dd-MM-yyyy)
 - **Minimum** and/or **Maximum** (for data types **Decimal** and **Integer**)
 - **Min. Length** and/or **Max. Length** (for data types **Text**)
7. To compare the open answer to a variable or an answer to a previous question:
 - Click **Add new validator**.
 - Select an **Operator** (=, <>, <, <=, >, >=).
 - If you select **Answer to a previous question**, you must then select the **Question** and **Category**.
 - If you select **Variable**, you can select an existing variable from the drop-down list or click the + button to add a new variable. If you want to add a new variable, see [Adding a Variable \(page 145\)](#).
8. Click the **Save** button.



Adding Conditions to a Question

You can add one or more conditions to a question to control whether the question will be displayed or skipped.

Conditions can be defined in two ways:

- Using the answer to a previous question. If the answer to the question was a particular category or open answer, the question is displayed.
- Using a variable. You can select an existing variable or define a new one. At runtime, the script associated with the variable will be evaluated and if the result is true, the question is displayed.

Procedure

This procedure assumes the questionnaire is displayed in the questionnaire editor. To open a questionnaire in the questionnaire editor, see [Editing a questionnaire \(page 130\)](#).

1. Open the questionnaire tree to locate the question to which you want to add a condition.
2. Click on the question.
3. Click the Edit question icon (in the upper right corner of the editor).
4. Select the **Conditions** tab.
5. To base the condition on the answer to a previous question:
 - Select **Answer to a previous question**.
 - Select an question in the **Question** list.
 - Select a category in the **Category** list.
6. To base the condition on a variable:
 - Select **Variable**.
 - To use an existing variable, select one in the drop-down list.
 - To define a new variable and script, select the + button beside the drop-down list. For more information, see [Adding a New Variable \(page 145\)](#).
 - Select a category in the **Category** list.
7. Click the **Save** button.



Adding a Variable

Variables are used in conditions (for displaying or skipping questions) and in validators for open answers. Variables are generated automatically when you create questions and categories. Onyx has many predefined variables for patient identification information. If you wish to define custom variables, you can do so as explained in this procedure.

When you add a variable, you write a script that consists of a logical or mathematical expression. The script is written using Javascript syntax and the Magma API, an application programming interface written expressly for biobank data. For more informaiton, see the [Magma API documentation](#) [<http://wiki.obiba.org/confluence/>]

display/OPALDOC/Magma+Javascript+API]. The script can include existing variables (that you can select from a list). At runtime when a user is completing the questionnaire, the script will be evaluated, and the result assigned to the variable. If the variable is part of a condition, Onyx will determine whether or not to display the question. See the example in [Figure 11.4 \(page 146\)](#). If the variable is part of a validator for an open answer, Onyx will accept or reject the value entered by the user. See the example in [Figure 11.5 \(page 146\)](#).

Name	CAO_condition	
Type	Boolean	
Script	<pre>\$('CAO_14').isNull().not().and(\$('CAO_14').any('2').not())</pre>	

Figure 11.4. Script for a variable used in a condition

Name	AGE_validation	
Type	Integer	
Script	<pre>var age = \$('Participants:Admin.Participant.age'); if (age.isNull().value()) 100; else age;</pre>	

Figure 11.5. Script for a variable used in a validator for an open answer

Procedure

1. If you are starting from the list of questionnaires:
 - Select the questionnaire in the list of questionnaires.
 - Click the **Edit** link.
 - Click **VARIABLES** in the questionnaire tree.
 - Click the **Add variable** icon.
2. To add or select a variable for use in a validator for an open answer, get to the **Variable** page by following procedure [Validating Open Answers \(page 143\)](#).
3. Enter a **Name** for the new variable.

4. Select a **Type** for the new variable. For a condition (used to determine whether a question will be displayed or skipped), select **Boolean**. For an open answer validator, the type should match the type of the open answer.

If you entered the variable from the validator for an open answer, you cannot change the data type. The variable is set to the same data type as the open answer.

5. In the **Script** field, enter an expression that will be evaluated at runtime. You can copy and paste existing variables (from the **Existing Variables** panel) in the script, as explained in the next step.
6. If you want to include existing variables:
 - Scroll through the list of **Tables** and select one. Each table corresponds to a questionnaire, except for **Participants** which contains Onyx's predefined variables for participant identification information.
 - Scroll through the list of **Variables** for the selected table and select one. The full name of the variable is displayed.
 - If you want to use the variable in the script, highlight its name in the **Full variable name** field, copy it (Ctrl-C) and paste it (Ctrl-V) into the desired spot in the **Script** field.
7. Click the **Save** button. The variable you just added should appear in the list of variables for the questionnaire the next time you view the questionnaire tree.



Moving Elements in a Questionnaire

After you have defined a certain number of sections, pages, and questions in a questionnaire, you may want to reorganize them. This is easily done by simply selecting the element you want to move in the questionnaire tree and then dragging to a new position in the tree and releasing it. If the move you try to make is not valid, a red X will be displayed when you release the element.



Downloading a Questionnaire

Downloading a questionnaire is the only way of saving a questionnaire for use in another Onyx installation or as a backup for safekeeping.

The output of downloading a questionnaire is a zip file that contains the XML file that defines the questionnaire, and one or more properties files (one for each display language in the questionnaire).

1. If the list of questionnaires is not displayed, access it as explained in in [Accessing the Questionnaires Page \(page 128\)](#).
2. Click the **Download** link for the questionnaire you wish to download. A dialog pops up.
3. To open the zip file in a viewer, select **Open with**. You can select an application in which to view it.
4. To save the zip file, select **Save**. You can specify a file name and location in which to store it.



Uploading a Questionnaire

Uploading a questionnaire is the way to open a questionnaire that was created in another Onyx installation.

In order to upload a questionnaire, it must have been saved as a zip file that contains the XML file that defines the questionnaire, and one or more properties files (one for each display language in the questionnaire).

1. If the list of questionnaires is not displayed, access it as explained in in [Accessing the Questionnaires Page \(page 128\)](#).
2. Click the **Upload new questionnaire** button. A dialog pops up.
3. Click the **Browse** button and locate the zip file for the questionnaire that you wish to upload.
4. Select **Save**. If the zip file contains the appropriate for a questionnaire that does not already exist in the current Onyx installation, the questionnaire is added to list of questionnaires.

Chapter 12. Topics for Participant Managers

This chapter covers topics of interest to Onyx users of type [participant manager \(page 4\)](#), including:

- Key concepts
- Procedures that can only be done by participant managers:
 - [Receiving a participant \(page 150\)](#)
 - [Enrolling a volunteer participant \(customizable\) \(page 154\)](#)
 - [Editing a participant's registration information \(page 157\)](#)
 - [Updating the appointment list \(page 159\)](#)
 - [Unlocking an interview \(page 162\)](#)

Key Concepts

This section contains concepts of interest to participant managers.



Receiving vs. Enrolling a Participant

Some studies invite people to participate in the study and set up appointments to interview them. These participants are added to the Onyx database when the appointment list is updated (see [Updating the Appointment List \(page 159\)](#)). When a participant arrives at the centre for their interview, a participant manager receives them. *Receiving a participant* involves finding the participant in Onyx, assigning a Participant ID, and checking some information about the participant that Onyx already obtained from the appointment list. See [Receiving a Participant \(page 150\)](#).

Some studies accept volunteer or walk-in participants. When a volunteer participant arrives at an assessment centre, a participant manager must enroll them. *Enrolling a participant* involves assigning a Participant ID and entering some information about the participant. See [Enrolling a Participant \(page 154\)](#)



Enrolling volunteer participants is a customizable feature of Onyx. If your study accepts volunteers, participant managers will see the **Enroll**

volunteer button in the upper right corner of the **Participants** page. See [Figure 12.1 \(page 150\)](#).

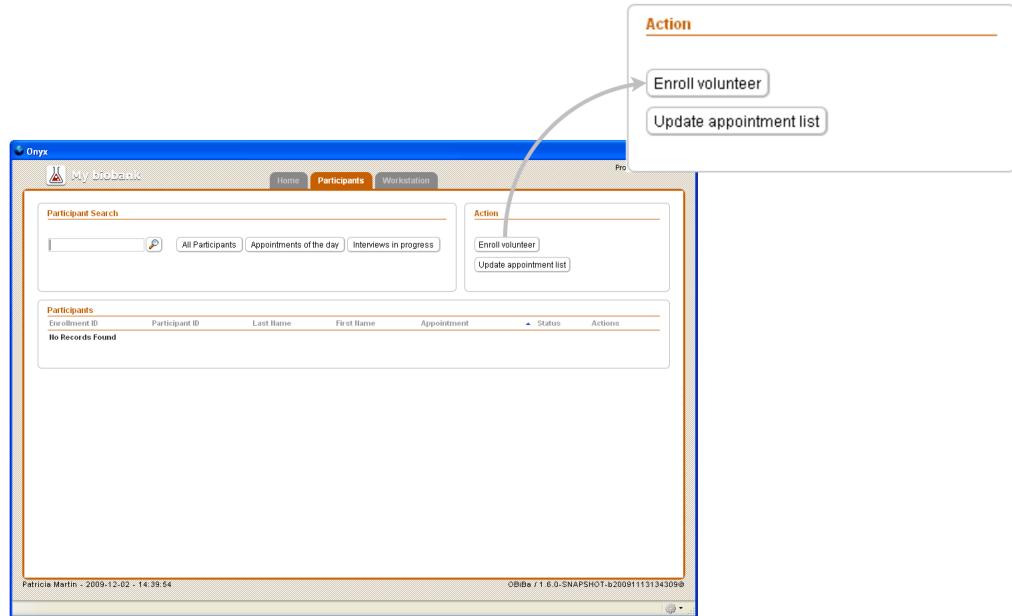


Figure 12.1. If your study accepts volunteers, participant managers will see an Enroll Volunteer button in the Participants page

Procedures



Receiving a Participant

When a participant (who has been invited to participate in the study) arrives at the site for their interview, a participant manager must receive them as explained in this section.

You will have to assign a Participant ID number, the number that will be used to track the participant during the interview and, will probably be used to track their data for the duration of the study. It is important to review the list of participants carefully when registering a new participant and assigning them a Participant ID.

Prerequisites

- You must be an Onyx user of type participant manager
- The appointment list should have been updated recently to ensure that the participant is in the Onyx database. See [Updating the Appointment List \(page 159\)](#).

- You must be prepared to assign a new Participant ID to the participant.



Each study determines how it will assign Participant IDs: either by scanning a barcode or by manually entering a number in a certain format and from a certain series of numbers.

Procedure

1. If the **Participants** page is not displayed, select the **Participants** tab to display it. (see [Figure 12.2 \(page 151\)](#))

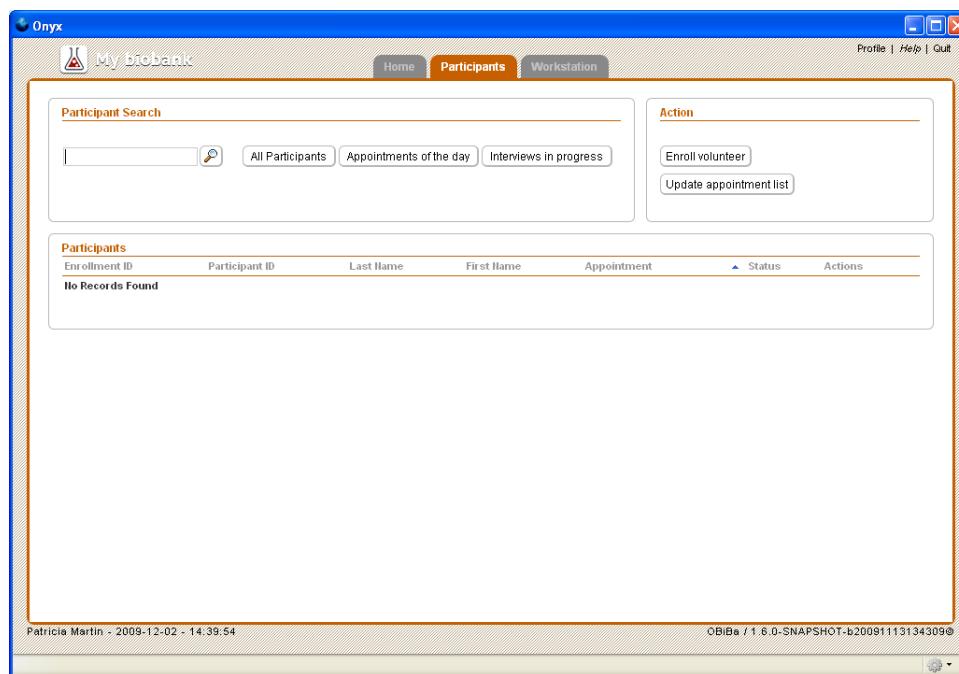


Figure 12.2. The Participants page as it appears to participant managers

2. Search for the participant in any of the ways described in [Finding a Participant \(page 23\)](#). After you find the participant, their name is displayed in **Participants** list and **Receive** appears in the **Actions** column for the participant. See [Figure 12.3 \(page 152\)](#).

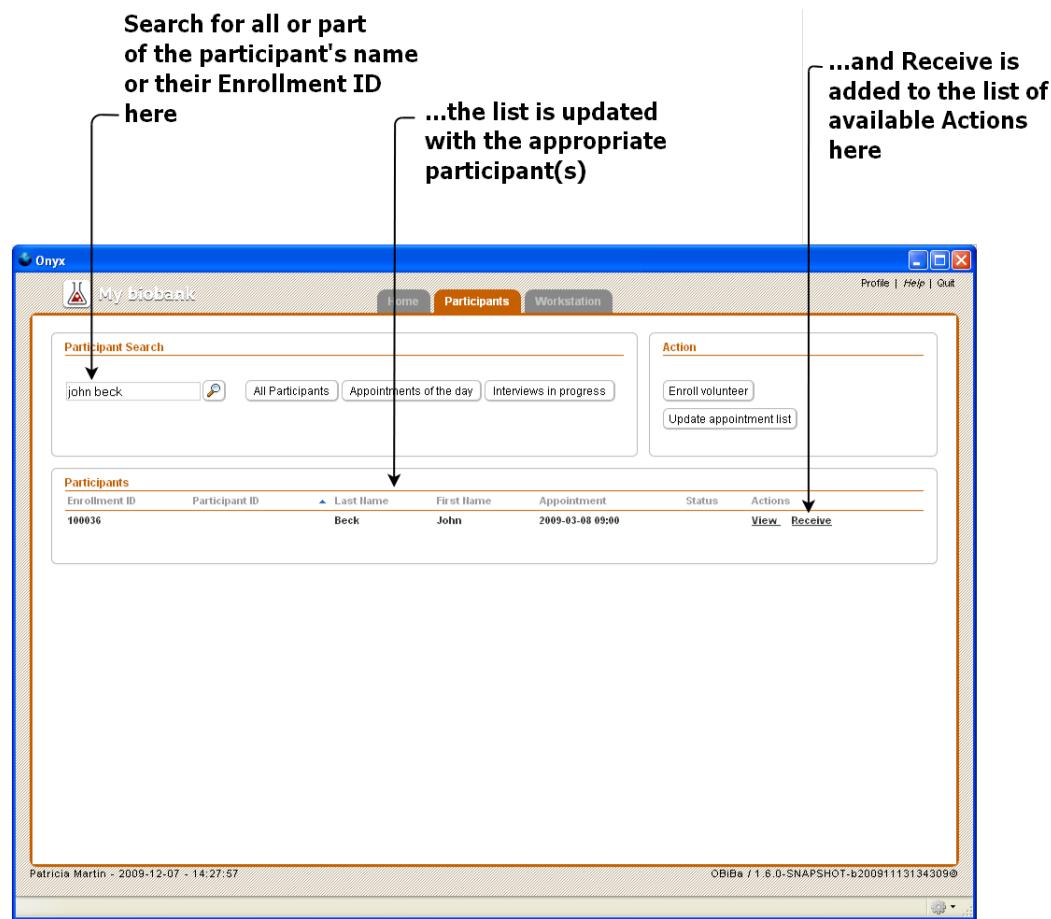


Figure 12.3. Finding the participant that you want to receive

3. Select the **Receive** link for the participant that you want to receive. The **Participant Reception** page is displayed. See [Figure 12.4 \(page 152\)](#).

Figure 12.4. Example of the Participant Reception page—the fields are defined by the study page

If Onyx has been configured to generate participant identifiers, the **Participant ID** field will have a **Generate ID** button next to it. Click on this button to automatically generate an ID for the participant being received. See [Figure 12.5 \(page 152\)](#)

Figure 12.5. Participant ID field with Generate ID button

4. If your study requires that you check a photo ID of the participant, now would be a convenient time to do so.

5. Check the information in the **Participant Registration** page with the participant and correct it, if necessary. Ensure that all required fields (marked with asterisks) are filled in. Fill in optional fields if the participant is willing to provide the information.



The fields you see were defined by your study and may be different from those shown in [Figure 12.4 \(page 152\)](#). Some fields are already completed with information that is in the appointment list. Certain key information (such as **Enrollment ID** in [Figure 12.4 \(page 152\)](#)) cannot be edited.

6. Assign a participant ID by scanning a new barcode or by entering a value manually in the **Participant ID** field.
7. If you decide not to proceed with receiving the participant, select the **Cancel** button. The **Participant Reception** page closes and the **Participants** page is redisplayed unchanged.
8. If you want to go ahead with receiving the participant, select the **Save** button. The **Participant Reception** page closes and the **Participants** page is redisplayed. The Status of the participant's interview has been updated to **In Progress** and Interview has been added in the **Actions** column for the participant. See [Figure 12.6 \(page 153\)](#).

After you receive a participant, the status of their interview is set to In Progress here...

...and Interview is added to the list of available Actions here

Enrollment ID	Participant ID	Last Name	First Name	Appointment	Status	Actions
100036	234347	Beck	John	2009-03-08 09:00	In Progress	View Interview Edit

Patricia Martin - 2009-12-07 - 14:27:57 OBiBa / 1.6.0-SNAPSHOT-b20091113134309@
<http://localhost:8080/example-webapp/wicket/bookmarkablePage=:org.obiba.onyx.webapp.participant.page.ParticipantSearchPage#>

Figure 12.6. After you receive a participant, the Participants page is updated

9. If there are several pages of participants in the list, you can step through the pages in the list or search for the participant in order to confirm the change in their status or start the interview.

The participant can now be interviewed. See [The Simplest Way to Start an Interview \(page 13\)](#) or [Entering the Interview page \(page 40\)](#).



Enrolling a Participant



If your study accepts volunteer participants, a participant manager can enroll them as explained in this section.

You will have to assign a Participant ID number, the number that will be used to track the participant during the interview and, will probably be used to track their data for the duration of the study. It is important to review the list of participants carefully when registering a new participant and assigning them a Participant ID.

Prerequisites

- You must be an Onyx user of type participant manager
- Your study accepts volunteer participants. The **Enroll volunteer** button is displayed in the **Participants** page as shown in [Figure 12.1 \(page 150\)](#).
- You must be prepared to assign a new Participant ID to the participant.



Each study determines how it will assign Participant IDs: either by scanning a barcode, by manually entering a number in a certain format and from a certain series of numbers, or by automatically generating an ID.

Procedure

1. If the **Participants** page is not displayed, select the **Participants** tab to display it. The **Enroll volunteer** button is displayed in the upper right corner.(see [Figure 12.1 \(page 150\)](#)).
2. Select the **Enroll volunteer** button. The **Volunteer Registration** page is displayed. See [Figure 12.7 \(page 155\)](#).



The fields you see were defined by your study and may differ from those shown in [Figure 12.7 \(page 155\)](#).

The screenshot shows the 'My Biobank' software interface with a blue header bar labeled 'Onyx'. Below the header are three tabs: 'Home', 'Participants' (which is selected), and 'Workstation'. On the right side of the header are 'Profile', 'Help', and 'Quit' buttons. The main window has a title 'Volunteer Registration' and contains the following fields:

- First Name * (text input field)
- Last Name * (text input field)
- Gender * (dropdown menu: Choose One)
- Birth Date (YYYY-MM-DD)* (text input field with a calendar icon showing '17')
- Address (grouped fields)
 - Street (text input field)
 - City (text input field)
 - Province (dropdown menu)
 - Country (dropdown menu)
 - Postal Code (text input field)
- Phone (text input field)
- Scan a participant ID * (text input field)
- Add comment if needed (text area)

At the bottom right are 'Save' and 'Cancel' buttons. The footer of the window displays the text 'Patricia Martin ~ 2009-12-08 ~ 11:00:37' and 'OBiBa / 1.6.0-SNAPSHOT-b20091113134309@'.

Figure 12.7. Example of the Volunteer Registration page—the fields are defined by the study

3. If your study requires that you check a photo ID of the participant, now would be a convenient time to do so.
4. Complete the fields. Required fields are indicated with an asterisk. You can scan a barcode to obtain a participant ID or enter a value manually.
5. If you decide not to enroll the participant, select the **Cancel** button. The **Volunteer Registration** page closes and the **Participants** page is redisplayed unchanged.
6. If you want to go ahead with enrolling the participant, select the **Save** button. The **Volunteer Registration** page closes and the **Participants** page is redisplayed. The participant's status updated to **In Progress** and **Interview** has been added in the **Actions** column for the participant. See [Figure 12.8 \(page 156\)](#).

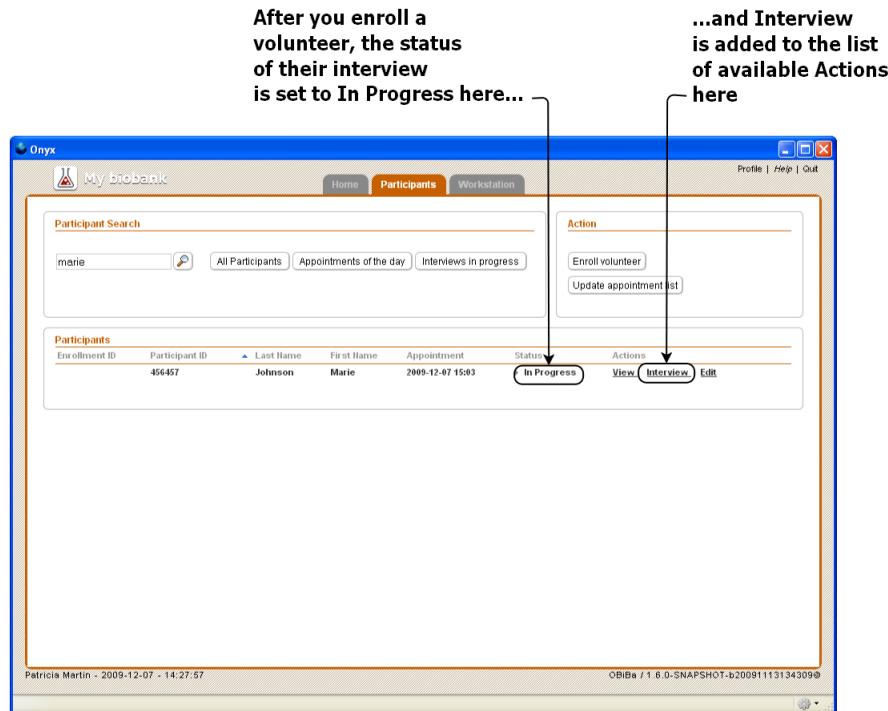


Figure 12.8. After you enroll a volunteer, the Participants page is updated



Enrolling a Participant from an External System

If Onyx has been configured to look up participant information stored in an external system (a "participant registry"), the enrollment procedure is slightly different.

You will first search for the participant in that system, using whatever unique identifier that system requires. After that, you will assign to that participant a Participant ID.

Prerequisites

The prerequisites are the same as in "regular" enrollment.

Procedure

1. The **Participant Registry** button is displayed in the upper right corner of the Participants page. See [Figure 12.9 \(page 156\)](#).

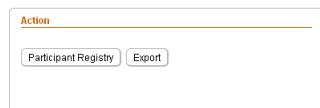


Figure 12.9. Participant Registry button

2. Select the **Participant Registry** button. The **Participant Registry Lookup** pop-up window is displayed. See [Figure 12.10 \(page 157\)](#).



The fields you see were defined by your study and may differ from those shown in [Figure 12.7 \(page 155\)](#).

The screenshot shows a modal dialog box titled "Participant Registry Lookup". At the top right is a close button (X). The form contains several input fields:

- A text input field labeled "Type the participant's unique identifier".
- A section labeled "First Name" with a text input field.
- A section labeled "Last Name" with a text input field.
- A section labeled "Birth Date" with a text input field.
- A section labeled "Gender" with a dropdown menu.
- A section labeled "Address" with a text input field.
- A section labeled "Street" with a text input field.
- A section labeled "City" with a text input field.
- A section labeled "Province" with a text input field.
- A section labeled "Country" with a text input field.
- A section labeled "Postal Code" with a text input field.
- A section labeled "Phone" with a text input field.

At the bottom of the form are three buttons: "Lookup" (highlighted in blue), "Receive", and "Cancel".

Figure 12.10. Example of the Participant Registry Lookup pop-up—the fields are defined by the study

3. Enter the participant's unique identifier and select **Lookup**. Upon a successful lookup, the participant fields will be filled in with the retrieved information.
4. To enroll the participant, select **Receive**. The **Volunteer Registration** page will be displayed. Now proceed the same way as with "regular" enrollment.
5. If you decide not to enroll the participant, select the **Cancel** button. The **Participant Registry Lookup** pop-up window closes and the **Participants** page is redisplayed unchanged.



Editing a Participant's Registration Information

After a participant has been received or enrolled, a participant manager can edit their registration information. It is potentially dangerous to change a participant's registration information after their interview has been started. For example, changing the participant's gender could cause a problem since some physical measurements and questionnaires depend on it. Onyx does not prevent you from creating this kind of problem.



Each study defines the registration information that is stored for a participant. Certain key information (such as the participant's name and ID numbers) cannot be changed after the participant was received or enrolled. Other information can be modified.

Prerequisites

- You must be an Onyx user of type participant manager

Procedure

1. If the **Participants** page is not displayed, click the **Participants** tab.
2. Find the participant whose information you want to edit. If you need help finding the participant, see [Finding a Participant \(page 23\)](#). When the **Participants** list is displayed, an **Edit** link appears (in the **Actions** column) for the participant. See [Figure 12.11 \(page 158\)](#).

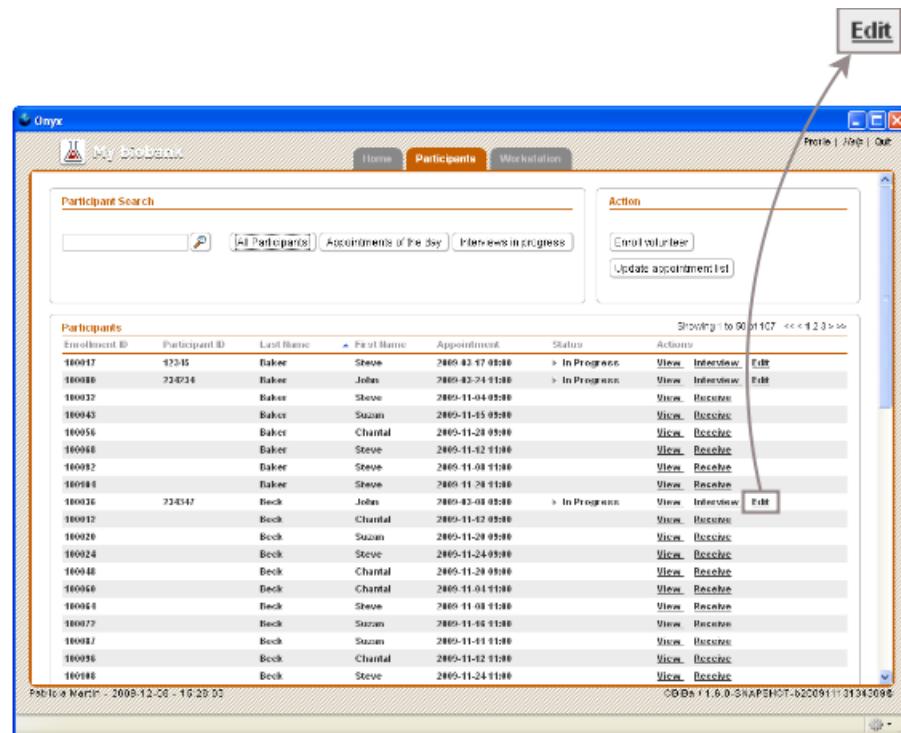


Figure 12.11. To edit a participant's registration information, click their **Edit** link.

3. Select the **Edit** link for the participant. The **Edit Participant** dialog is displayed. See [Figure 12.12 \(page 159\)](#).



Each study defines the information that is stored for its participants. You may not see the same fields as those shown in [Figure 12.12 \(page 159\)](#).

The screenshot shows the 'Edit Participant' dialog box. It contains fields for Enrollment ID (100080), Participant ID (234234), First Name (John), Last Name (Baker), Gender (M), Birth Date (1970-06-06), Street (799 Lakeshore Rd), City (Pointe-Claire), Province (Quebec), Country (Canada), Postal Code (H8R 2W3), and Phone number (514-343-9898 ext 9573). At the bottom are Save and Cancel buttons.

Figure 12.12. Example: Edit Participant dialog—each study defines which information is stored for its participants.

4. Make the necessary changes. Certain key information (such as the participant's name and ID numbers) cannot be edited.
5. If you decide not to store the changes, select the **Cancel** button.
6. If you want to proceed with changing the information, select the **Save** button. The **Edit Participant** dialog closes. Your changes have been stored in the Onyx database.



Updating the Appointment List

Onyx does not schedule appointments for participants. Instead it imports an [appointment list \(page 18\)](#) from a file. The appointment list is updated automatically. If necessary, Onyx users of type participant manager can also update the appointment list manually as explained in this section.



Your study customized how often the appointment list is updated. Contact your system administrator if you want to know how often the list is updated or have any other questions about the list.

Prerequisite

- You are an Onyx user of type [participant manager \(page 4\)](#).

- If you want to select an appointment list file, you must know the name and location of such files. Appointment files usually have an XML or XLSL extension.



Each study customizes its appointment list. Your study defined the file type, name, and location, as well as the information stored for each participant. Contact your system administrator to know more about appointment list files for your study.

Procedure

1. If the **Participants** page is not displayed, select the **Participants** tab to display it. The **Update appointment list** button is displayed in the upper right corner. See [Figure 12.13 \(page 160\)](#).

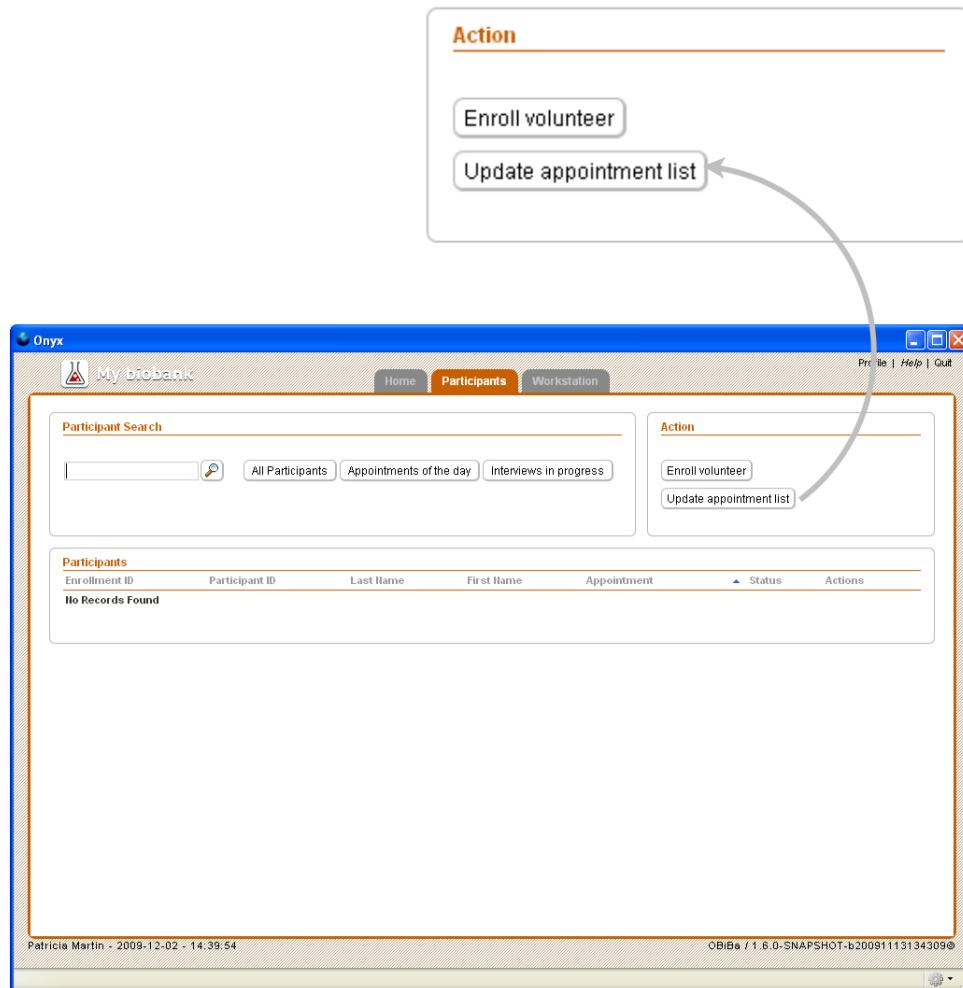


Figure 12.13. Participant managers see the **Update appointment list** button in the Participants page

2. Select the **Update appointment list** button. The **Update Appointments** dialog is displayed. See [Figure 12.14 \(page 161\)](#).

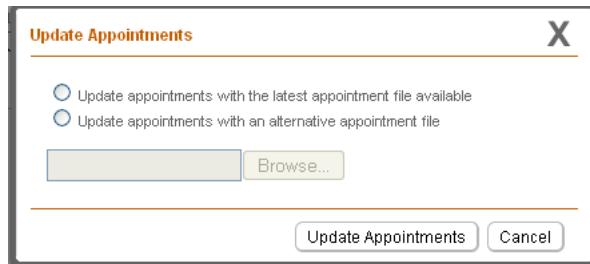


Figure 12.14. The Update Appointments dialog

3. If you want to use the appointment file from the default location, select the first option button (**Update appointments with the latest appointment file available**).
4. If you want to search for an appointment list file to use for the update, select the second option button (**Update appointments with an alternative appointment file**). If you need help locating a file, contact your system administrator.
5. If you decide not to update the list, select the **Cancel** button. The **Update Appointments** dialog is closed and the **Participants** page is visible again.
6. If you want to proceed with updating the list, select the **Update Appointments** button. During the update, a progress bar is displayed in the dialog. When the update is complete, the dialog displays a report about the update. See [Figure 12.15 \(page 161\)](#).

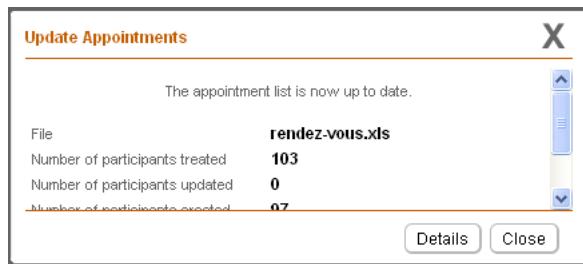


Figure 12.15. The Update Appointments dialog displays a report when the update is complete

7. Select the **Details** button if you want to read more about how the update went. A **Log** dialog is displayed. If any errors were reported in the log, contact your system administrator. When you have finished viewing the log, select the **Close** button of the dialog.
8. When you have finished viewing the report in the **Update Appointments** dialog, select its **Close** button. The dialog is closed and the **Participants** page is visible again. The list of participants is now up-to-date.



Unlocking an Interview

When a staff member is in the middle of an interview stage with a participant, that staff member has a lock on the interview. This prevents conflicts in storing data. Occasionally, you may need to unlock an interview. For example, a technical problem may be preventing the interview from being released, or the staff member who has a lock on the interview is not able to continue the interview. A participant manager can unlock the interview as explained in this section.

Prerequisite

You are an Onyx user of type [participant manager](#) (page 4).

Procedure

1. If the **Participants** page is not displayed, select the **Participants** tab to display it.
2. Locate the participant whose interview is locked. See [Figure 12.16](#) (page 162).

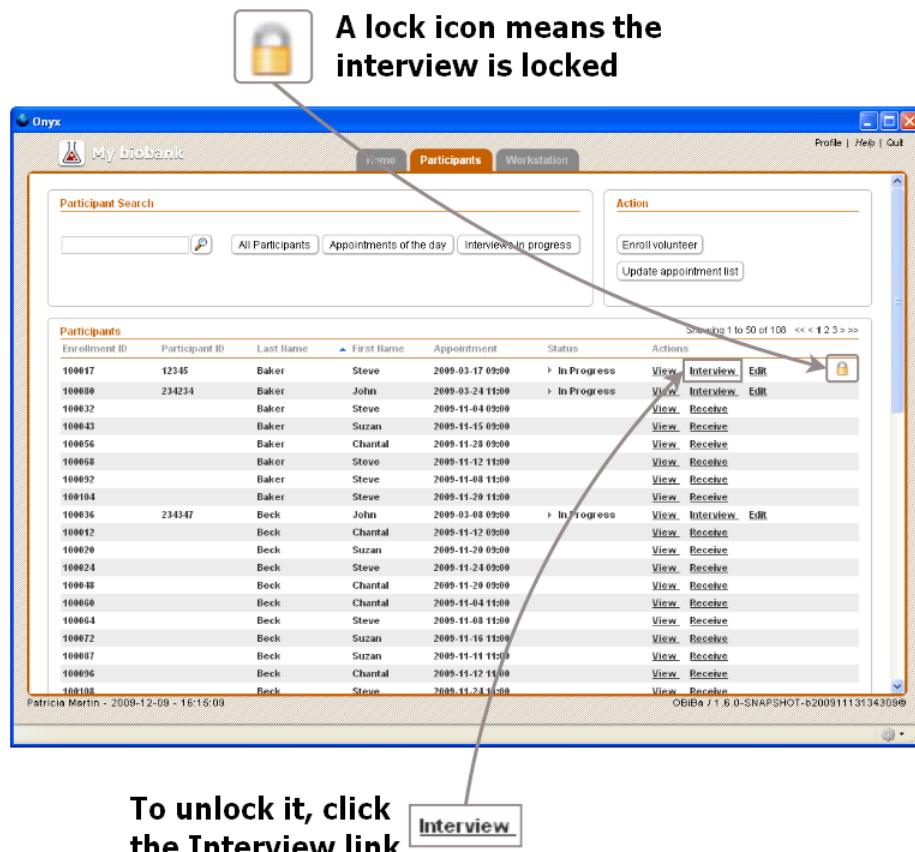


Figure 12.16. A participant manager can unlock an interview in the Participants page

3. Select the **Interview** link for the participant whose interview you want to unlock. A message is displayed asking you to confirm that you want to unlock the interview.



Figure 12.17. A message asks you to confirm that you want to unlock the interview

4. If you decide not to unlock the interview, select the **No** or **Cancel** button. The **Participants** page is visible displayed. The interview is still locked.
5. To unlock the interview, select the **Yes** button. The **Interview** page for the participant is displayed.
6. To allow another Onyx user to work on the interview, select the **Exit X** button. The **Interview** page closes. The **Participants** page is visible displayed. The interview is unlocked.

Chapter 13. Topics for System Administrators

This chapter covers topics of interest to Onyx whose role is [system administrator \(page 5\)](#). A system administrator has all the permissions of the other two user roles ([data collector \(page 4\)](#) and [participant manager \(page 4\)](#)), as well as a few additional permissions. This chapter covers those additional permissions. In particular, this chapter covers:

- Key concepts of interest to system administrators
- Procedures (in the Onyx user interface) that can only be done by system administrators:
 - [Adding an Onyx user \(page 167\)](#)
 - [Editing the profile of an Onyx user \(page 167\)](#) (including password reset)
 - [Activating and deactivating Onyx users \(page 168\)](#)
 - [Deleting an Onyx user \(page 168\)](#)
 - [Exporting data \(page 169\)](#) (participant data, as well as data about instruments and experimental conditions)
 - Purging data (participant data only)

Key Concepts

This section contains concepts of interest to system administrators.

User Roles

These are the roles that are possible for Onyx users:

- Data collector - has basic permissions
- Participant manager - has data collector permissions plus a few more
- Questionnaire editor - only has permissions to create and edit questionnaires
- System administrator - has permissions of participant manager plus a few more

For details about what each user role can do, see [Who Uses Onyx \(page 4\)](#).

User Status

Onyx users have one of these statuses:

- **Active:** The user can log in. By default, when a user is created, their status is active.
- **Inactive:** The user will not be able to log in. For example, you may want to deactivate a user who is away on leave.

The word that appears in the **Status** column in the **User** administration page is the user's current status.

Only system administrators can change the status of an Onyx user. See [Activating and Deactivating Onyx Users \(page 168\)](#).

Data Export

Exporting data from Onyx means reading data from the Onyx database and writing it to one or more export destinations. Here are some points worth noting about the Onyx export function:

- Exporting does not delete any data from the Onyx database. Deleting data from the database is done by the purge function. See [Data Purge \(page 166\)](#).
- An export destination is a compressed zip file. The name given to an export destination may indicate the location into which the data will be imported—for example, a data repository like Opal.
- Participant data and experimental conditions data can be exported. See [Participant Data \(page 166\)](#) and [Experimental Condition Data \(page 166\)](#).
- Configuration of data export is done entirely in configuration files, not through the Onyx user interface. Some things that can be configured:
 - Which data is selected for export
 - Directory to which export files are written
 - How many export destinations are defined

For detailed information about how the export function is configured, see the OBiBa Wiki (<http://wiki.obiba.org/confluence/display/ONYX/Onyx+1.6.0+Upgrade>).

Only system administrators can execute a data export from the Onyx user interface. See [Exporting Data \(page 169\)](#).

Data Purge

In Onyx, purging data means deleting data from the Onyx database. Only [participant data \(page 166\)](#) can be purged—not [experimental conditions data \(page 166\)](#).

Configuration of data purging is done entirely in configuration files, not through the Onyx user interface. For detailed information about how the purge function is configured, see the OBiBa Wiki (<http://wiki.obiba.org/confluence/display/ONYX/Onyx+1.6.0+Upgrade>).

Only system administrators can execute a purge from the Onyx user interface. See [Purging Data \(page 169\)](#).

Participant Data

Participant data includes personal information (such as the participant's name and address), as well the data from all stages of the interview (consent, questionnaires, physical measurements, and information about the biospecimens collected).

Participant data can be exported (see [Exporting Data \(page 169\)](#)) and purged (see [Purging Data \(page 169\)](#)).

Experimental Conditions Data

Each study can define experimental conditions that it would like to track on a regular basis. This information is stored in one or more experimental condition logs. The **Workstation** page of the Onyx user interface allows users to make entries in these logs. As a system administrator, you will export this data, so you should be familiar with the experimental condition logs that were defined for the study. The user interface for experimental condition logs is in the lower half of the **Workstation** page.

Instrument data is a special case of experimental conditions data. See [Instrument Data \(page 166\)](#).

Experimental conditions data can be exported (see [Data Export \(page 165\)](#)), but it cannot be purged (see [Data Purge \(page 166\)](#)). This data is not purged because it is needed for the log history, and because no privacy issues are involved with this kind of data.

Instrument Data

Instruments are part of the experimental setup, so data about instruments is a special case of [experimental conditions data \(page 166\)](#). As a system administrator, you will

export this instrument data, so you should be familiar with the instrument calibrations that are done for the study. The user interface for instrument calibration is in the top half of the **Workstation** page. Like other experimental condition data, instrument data can be exported but not purged.

Procedures

This section contains procedures that require system administrator permissions.



Adding an Onyx User

Only system administrators can create new Onyx users. You must know what role the user will play: Data collector, Participant Manager or System Administrator. For details about what each user role can do, see [Who Uses Onyx \(page 4\)](#).

Procedure

1. Log in to the Onyx user interface.
2. Select the **Administration** link in the upper right corner of any Onyx page. By default, you are on the **User** page.
3. Select the **Add User** button. A dialog prompts you to enter information about the new user.
4. Enter the appropriate information in the user identification fields.
5. In the **Role(s)** list, select all the roles that the user will play. To select multiple roles, hold down the **Ctrl** key and click on each of the roles.
6. For **Language**, select the language that the user prefers for viewing the Onyx user interface.
7. Click **Save**.



Editing the Profile of an Onyx User

Only system administrators can edit the profile of an Onyx user as explained in this section. You can reset the user's password when you edit their profile.

Procedure

1. Log in to the Onyx user interface.

2. Select the **Administration** link in the upper right corner of any Onyx page. By default, you are on the **User** page.
3. Select the **Edit** link for the user whose profile you need to edit. A dialog displays the information you can edit.
4. Make the necessary changes and select **Save**.



Activating and Deactivating Onyx Users

You may need to deactivate a user temporarily. You do this by changing their status to [Inactive \(page 165\)](#). When you need to reactivate a user who was deactivated, you change their status to [Active \(page 165\)](#). The word that appears in the **Status** column in the **User** administration page, is the user's current status.

If you need to remove a user permanently, you must delete them. See [Deleting an Onyx User \(page 168\)](#).

Procedure

1. Log in to the Onyx user interface.
2. Select the **Administration** link in the upper right corner of any Onyx page. By default, you are on the **User** page.
3. Locate the user whose status you need to change. The word that appears in the **Status** column is the user's current status.
4. Click on the user's current status in the [Status \(page 165\)](#) column. The status changes immediately to the new status. If the status was **Active**, it changes to **Inactive**. If the status was **Inactive**, it changes to **Active**.



Deleting an Onyx User

Deleting an Onyx user removes them from the user list permanently. Only system administrators can delete an Onyx user as explained in this section.

You can also deactivate a user temporarily, rather than deleting them, if this is more appropriate. See [Inactive user status \(page 165\)](#) and [Activating and Deactivating Onyx Users \(page 168\)](#).

Procedure

1. Log in to the Onyx user interface.

2. Select the **Administration** link in the upper right corner of any Onyx page. By default, you are on the **User** page.
3. Select the **Delete** link for the user that you need to delete. A dialog prompts you to confirm that you want to delete the user.
4. Select **OK** to delete the user.



Exporting Data

Exporting data from Onyx means copying participant and experimental condition data (including instrument data) from the Onyx database to one or more export destinations. Only system administrators can execute an export as explained in this section.

For information about what is exported when you click the **Export** button, see [Data Export \(page 165\)](#).

Procedure

1. Log in to the Onyx user interface.
2. Select the **Administration** link in the upper right corner of any Onyx page.
3. Select the **Data** tab.
4. Select the **Export** button. A dialog prompts you to confirm that you wish to export.
5. Select the **Yes** button . A dialog prompts to confirm that you wish to proceed with the export.



Purging Data

In Onyx, purging data means deleting data from the Onyx database. Only system administrators can execute a purge as explained in this section.

For information about what is deleted when you click the **Purge** button, see [Data Purge \(page 166\)](#).

Procedure

1. Log in to the Onyx user interface.

2. Select the **Administration** link in the upper right corner of any Onyx page.
3. Select the **Data** tab.
4. Select the **Purge** button. A dialog prompts you to confirm that you wish to purge participant data.
5. Select the **Purge Participants** button. A dialog prompts you to confirm that you wish to proceed with the export.