

# Package ‘zzedc’

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**Type** Package

**Title** Electronic Data Capture System for Clinical Trials

**Version** 1.0.0

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**Description** A comprehensive 'Shiny' application for electronic data capture (EDC) in clinical trials. Features include secure user authentication, data entry forms, quality control reports, data visualization, and flexible export capabilities. Built with modern 'bslib' components for responsive design and professional appearance. Supports the zcollab framework for clinical research workflows.

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**URL** <https://github.com/rgt47/zzedc>

**BugReports** <https://github.com/rgt47/zzedc/issues>

**Config/testthat/edition** 3

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zzedc-package	<i>ZZedc: Electronic Data Capture System for Clinical Trials</i>
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---

**Description**

The zzedc package provides a comprehensive Shiny application for electronic data capture (EDC) in clinical trials. It features secure authentication, data entry forms, quality control reports, visualization tools, and export capabilities, all built with modern bslib components.

**Details**

**Key Features:**

**Authentication & Security:**

- Role-based user authentication
- Encrypted data storage
- Audit trail capabilities

**Data Entry:**

- Customizable data entry forms
- Real-time validation
- Progress tracking

**Reporting:**

- Basic data summaries
- Data quality reports
- Statistical analysis reports

**Data Management:**

- Interactive data explorer
- Missing data analysis
- Data visualization tools

**Export & Integration:**

- Multiple export formats (CSV, Excel, JSON, PDF, HTML)
- Batch export capabilities
- Export templates and scheduling

**Getting Started:**

To launch the EDC application:

```
library(zzedc)
launch_zzedc()
```

The application will open in your default web browser with a modern, responsive interface powered by Bootstrap 5.

**Default Credentials:**

For testing purposes, the following credentials are available:

- Username: ww, Password: pw
- Username: q, Password: pw
- Username: w, Password: pw

**Note:** Change these credentials before deploying to production.

**Package Dependencies**

This package builds on several excellent R packages including shiny, bslib, DT, ggplot2, plotly, and others to provide a comprehensive EDC solution.

**Author(s)**

Ronald G. Thomas

**See Also**

Useful links:

- <https://github.com/rgt47/zzedc>
- Report bugs at <https://github.com/rgt47/zzedc/issues>

---

check\_aws\_kms\_status    *Check AWS KMS Status and Permissions*

---

**Description**

Provides comprehensive diagnostic information about AWS KMS setup, credentials, region configuration, and IAM permissions. Useful for troubleshooting setup issues.

**Usage**

```
check_aws_kms_status()
```

**Details**

Performs comprehensive AWS KMS diagnostic checks:

1. Credentials: Checks if AWS credentials are available and valid
2. Region: Detects AWS region from environment or config
3. Identity: Retrieves AWS caller identity (account, user/role)
4. Connectivity: Tests connection to Secrets Manager
5. Secret: Checks if default secret exists
6. Permissions: Tests each required IAM permission
7. Recommendations: Suggests fixes for any issues found

**Value**

List with detailed AWS KMS status:

- configured: Logical TRUE if fully configured
- region: AWS region being used
- credentials\_available: Logical TRUE if AWS credentials found
- sts\_identity: AWS caller identity (account, user/role, ARN)
- secret\_manager\_access: Logical TRUE if can reach Secrets Manager
- default\_secret\_exists: Logical TRUE if "zzedc/db-encryption-key" exists
- permissions: List with individual permission test results
- recommendations: Character vector of setup recommendations
- errors: Character vector of any errors encountered
- status\_message: Human-readable overall status

**Examples**

```
## Not run:
status <- check_aws_kms_status()

if (status$configured) {
  cat("AWS KMS fully configured\n")
} else {
  cat("Issues found:\n")
  cat("Errors:", status$errors, "\n")
}

## End(Not run)
```

---

complete\_wizard\_setup *Complete Setup Wizard Orchestration*

---

**Description**

Orchestrates all setup steps for initializing a new ZZedc instance

**Usage**

```
complete_wizard_setup(config_list, base_path = "~/zzedc_instance")
```

**Arguments**

config_list	Complete configuration from wizard
base_path	Base directory for new installation

**Value**

List with overall success status and detailed results

---

create_error_display	<i>Display form validation errors to user</i>
----------------------	---

---

**Description**

Creates user-friendly error messages from validation results

**Usage**

```
create_error_display(validation_result)
```

**Arguments**

validation_result	
	Result from validate_form()

**Value**

HTML list of error messages

---

create_launch_script	<i>Create Launch Script for New ZZedc Instance</i>
----------------------	--

---

**Description**

Creates a customized launch script file that users can run to start the application

**Usage**

```
create_launch_script(config_list, output_path)
```

**Arguments**

config_list	Configuration from wizard
output_path	Path where launch script will be written

**Value**

List with success status

---

create\_paginated\_reactive  
*Create reactive paginated data*

---

**Description**

Returns reactive expression that manages paginated data view

**Usage**

```
create_paginated_reactive(  
  data_source,  
  page_size = 25,  
  search_reactive = NULL,  
  sort_reactive = NULL  
)
```

**Arguments**

data_source	Reactive data.frame
page_size	Number of rows per page
search_reactive	Optional reactive search term
sort_reactive	Optional reactive sort specification (list with \$by and \$direction)

**Value**

Reactive expression returning list with paginated data and metadata

---

create\_pagination\_ui    *Create pagination UI controls*

---

**Description**

Generates navigation buttons for pagination

**Usage**

```
create_pagination_ui(pagination, input_id = "data")
```

**Arguments**

pagination	Pagination info from paginate_data()
input_id	Namespace ID for pagination inputs

**Value**

HTML div with pagination controls

---

create_wizard_config	Create Config File from Wizard Configuration
----------------------	--

---

**Description**

Creates configuration file with all required application settings

**Usage**

```
create_wizard_config(config_list, config_path, security_salt)
```

**Arguments**

config_list	List containing wizard configuration
config_path	Path where config.yml will be written
security_salt	The security salt for hashing

**Value**

List with success status and messages

---

create_wizard_database	Create ZZedc Database from Wizard Configuration
------------------------	---

---

**Description**

Creates a complete database with all required tables

**Usage**

```
create_wizard_database(config_list, db_path)
```

**Arguments**

config_list	List containing wizard configuration (from wizard_state\$system_config)
db_path	Path where database file will be created

**Value**

List with success status and messages



**Examples**

```
## Not run:
config <- list(
  study_name = "My Study",
  protocol_id = "PROTO-001",
  admin_username = "admin",
  admin_password = "MyPass123!",
  security_salt = "abc123..."
)
create_wizard_database(config, "~/my_study.db")

## End(Not run)
```

---

```
create_wizard_directories
```

*Create Directories for New ZZedc Instance*

---

**Description**

Creates the directory structure needed for a new ZZedc installation

**Usage**

```
create_wizard_directories(base_path)
```

**Arguments**

base\_path      Base directory where subdirectories will be created

**Value**

List with success status

---

```
detect_setup_status      Detect Configuration Status
```

---

**Description**

Comprehensive check of setup status

**Usage**

```
detect_setup_status()
```

**Value**

List with status information

---

```
enable_session_timeout
```

*Enable session timeout monitoring*

---

### Description

Should be called in `server()` function to activate timeout checking. Monitors user inactivity and logs out after configured timeout period.

### Usage

```
enable_session_timeout(
  session,
  user_input,
  timeout_config,
  on_timeout_callback = NULL
)
```

### Arguments

<code>session</code>	Shiny session object
<code>user_input</code>	reactiveValues object containing user session state
<code>timeout_config</code>	List with <code>timeout_minutes</code> (from <code>config\$auth\$session_timeout_minutes</code> )
<code>on_timeout_callback</code>	Function to call when timeout occurs (default: logs out user)

---

```
error_response
```

*Create standardized error response*

---

### Description

Returns a consistent error response structure.

### Usage

```
error_response(message, code = NULL)
```

### Arguments

<code>message</code>	Character - error message
<code>code</code>	Character - error code (optional)

### Value

List with `success=FALSE` and message

---

execute_init_setup	<i>Execute Initialization Setup</i>
--------------------	-------------------------------------

---

**Description**

Common code for both interactive and config modes

**Usage**

```
execute_init_setup(config, project_dir = ".")
```

**Arguments**

config	Configuration list
project_dir	Directory where project will be created

**Value**

List with setup results

---

export_audit_log	<i>Export audit log to file</i>
------------------	---------------------------------

---

**Description**

Saves audit log to CSV with hash verification included.

**Usage**

```
export_audit_log(audit_log, filepath, include_verification = TRUE)
```

**Arguments**

audit_log	reactiveVal or data.frame containing audit records
filepath	Character - path to save audit log
include_verification	Logical - include verification summary?

---

export_to_file	<i>Export data to file</i>
----------------	----------------------------

---

**Description**

Writes export data to specified file format. Supports 9 formats: CSV, XLSX, JSON, SAS, SPSS, STATA, RDS, PDF, HTML

**Usage**

```
export_to_file(data, filepath, format, options = NULL)
```

**Arguments**

data	Data to export (data.frame or list)
filepath	Path to write export file
format	Export format (csv, xlsx, json, sas, spss, stata, rds, pdf, html)
options	List of format-specific options

**Value**

List with success status and file info

---

filter_data_by_search	<i>Filter data by search term</i>
-----------------------	-----------------------------------

---

**Description**

Searches all columns for matching values

**Usage**

```
filter_data_by_search(data, search_term, columns = NULL)
```

**Arguments**

data	data.frame to search
search_term	Text to search for (case-insensitive)
columns	Column names to search in (NULL = all columns)

**Value**

Filtered data.frame

---

generate_db_key	<i>Generate a random database encryption key</i>
-----------------	--

---

**Description**

Creates a cryptographically secure 256-bit random key for SQLCipher database encryption. Returns as a 64-character hexadecimal string.

**Usage**

```
generate_db_key()
```

**Details**

Key generation:

- Uses openssl::rand\_bytes() for cryptographic security
- 256-bit key = 32 bytes = 64 hex characters
- Never user-provided (best practice: auto-generated)
- Store result in environment variable or AWS Secrets Manager

**Value**

Character string: 64-hex-character encryption key (256-bit)

**Examples**

```
## Not run:
key <- generate_db_key()
Sys.setenv(DB_ENCRYPTION_KEY = key)

## End(Not run)
```

---

generate_export_filename	<i>Generate safe export filename</i>
--------------------------	--------------------------------------

---

**Description**

Creates a safe, properly formatted filename for export

**Usage**

```
generate_export_filename(base_name = NULL, data_source, format)
```

**Arguments**

base_name	Base filename (user-provided or default)
data_source	Data source identifier
format	Export format (csv, xlsx, json, sas, spss, stata, rds, pdf, html)

**Value**

Safe filename with extension

---

```
generate_security_salt
```

*Generate Security Salt*

---

**Description**

Creates a random 32-character salt for password hashing

**Usage**

```
generate_security_salt()
```

**Value**

Character string of random salt

---

```
get_encryption_key
```

*Get database encryption key from environment or AWS KMS*

---

**Description**

Retrieves encryption key with automatic fallback:

1. Try AWS KMS (if credentials and key\_id provided)
2. Try environment variable DB\_ENCRYPTION\_KEY
3. Error if neither available

**Usage**

```
get_encryption_key(aws_kms_key_id = NULL)
```

**Arguments**

aws\_kms\_key\_id Character: AWS KMS key ID (optional)

**Details**

Priority order:

1. AWS KMS (if aws\_kms\_key\_id provided or USE\_AWS\_KMS=true)
  - Requires paws package
  - Requires AWS credentials (~/.aws/credentials or env vars)
  - Requires AWS IAM permissions for Secrets Manager
2. Environment variable DB\_ENCRYPTION\_KEY
  - Set with: Sys.setenv(DB\_ENCRYPTION\_KEY = "...")
  - Best for development
3. Error if neither available
  - Helpful error message with setup instructions

**Value**

Character: 64-char hex encryption key

**Examples**

```
## Not run:
# Development (environment variable):
Sys.setenv(DB_ENCRYPTION_KEY = "a1b2c3d4...")
key <- get_encryption_key()

# Production (AWS KMS):
key <- get_encryption_key(aws_kms_key_id = "arn:aws:kms:...")

## End(Not run)
```

---

get\_encryption\_key\_from\_aws\_kms

*Retrieve encryption key from AWS Secrets Manager*

---

**Description**

Retrieves stored encryption key from AWS Secrets Manager. Requires paws package and AWS credentials.

**Usage**

```
get_encryption_key_from_aws_kms(key_id = NULL)
```

**Arguments**

key\_id                      Character: AWS Secrets Manager secret name (optional)

**Details**

Default secret name: "zzedc/db-encryption-key"

Requirements:

- paws package installed: `install.packages("paws")`
- AWS credentials configured: `~/.aws/credentials` or environment variables
- AWS IAM permissions: `secretsmanager:GetSecretValue`

**Value**

Character: Decrypted encryption key (64 hex chars)

**Examples**

```
## Not run:
# Requires AWS credentials
key <- get_encryption_key_from_aws_kms("zzedc/db-encryption-key")

## End(Not run)
```

---

get_instrument_field	<i>Get instrument field by name</i>
----------------------	-------------------------------------

---

**Description**

Retrieves a single field definition from an instrument.

**Usage**

```
get_instrument_field(  
    instrument_name,  
    field_name,  
    instruments_dir = "instruments/"  
)
```

**Arguments**

instrument_name	Name of instrument
field_name	Name of field to retrieve
instruments_dir	Path to instruments directory

**Value**

List with field properties, or NULL if not found

---

get_page_summary	<i>Generate page summary statistics</i>
------------------	---

---

**Description**

Calculates column-wise statistics for paginated data

**Usage**

```
get_page_summary(page_data, numeric_cols = NULL)
```

**Arguments**

page_data	data.frame with current page data
numeric_cols	Column names to compute stats for

**Value**

data.frame with summary statistics



---

`get_setup_instructions`*Get Setup Instructions*

---

**Description**

Returns helpful instructions for completing setup

**Usage**

```
get_setup_instructions()
```

**Value**

Character string with setup instructions

---

`handle_error`*Handle errors with logging and user notification*

---

**Description**

Wraps expression evaluation with error handling, logging, and user feedback.

**Usage**

```
handle_error(  
  expr,  
  error_title = "Error",  
  show_user = TRUE,  
  log_file = NULL,  
  return_value = NULL  
)
```

**Arguments**

<code>expr</code>	Expression to evaluate
<code>error_title</code>	Character - title for user error message
<code>show_user</code>	Logical - show error modal to user?
<code>log_file</code>	Character - file to log errors (optional)
<code>return_value</code>	Value to return if error occurs (default: NULL)

**Value**

Result of `expr` if successful, `return_value` if error

**Examples**

```
## Not run:
result <- handle_error({
  authenticate_user(username, password)
}, error_title = "Authentication Failed")

## End(Not run)
```

---

import_instrument	<i>Import instrument as new form</i>
-------------------	--------------------------------------

---

**Description**

Imports a pre-built instrument into the project as a new form. Creates form record in database and returns form metadata.

**Usage**

```
import_instrument(
  instrument_name,
  form_name = NULL,
  form_description = NULL,
  db_conn = NULL,
  instruments_dir = "instruments/"
)
```

**Arguments**

instrument_name	Name of instrument to import (e.g., "phq9")
form_name	New form name (defaults to instrument name if not provided)
form_description	Description of form for display
db_conn	Database connection (RSQLite::SQLiteConnection)
instruments_dir	Path to instruments directory

**Value**

List containing:

- success: Logical, operation successful?
- form\_id: ID of newly created form
- form\_name: Name of created form
- fields\_imported: Number of fields added
- message: Status message
- errors: Character vector of any errors encountered

## Examples

```
## Not run:
result <- import_instrument(
  instrument_name = "phq9",
  form_name = "baseline_depression",
  form_description = "PHQ-9 administered at baseline visit",
  db_conn = conn
)

## End(Not run)
```

---

init

Initialize ZZedc Project

---

## Description

Create a new ZZedc project locally or on a server. Two modes available:

- Interactive: User-friendly prompts in R console (recommended for novices)
- Config: Read from YAML configuration file (recommended for DevOps/AWS)

## Usage

```
init(mode = "interactive", config_file = NULL, project_dir = ".")
```

## Arguments

mode	Character. Either "interactive" (default) or "config"
config_file	Character. Path to configuration YAML file (required if mode="config")
project_dir	Character. Directory where project will be created (default: current directory)

## Details

### Interactive Mode:

Guides users through setup with prompts in the R console:

```
zzedc::init()
# Will ask for:
# - Study name
# - Protocol ID
# - PI information
# - Admin account details
# - Security settings
```

### Config File Mode:

Reads configuration from YAML file (non-interactive):

```
zzedc::init(mode = "config", config_file = "zzedc_config.yml")
# Silently creates project from config
# Useful for automation, Docker, AWS
```

**Value**

Invisibly returns list with setup results and project location

**Examples**

```
## Not run:
# Interactive mode (novice user)
zzedc::init()

# Config file mode (DevOps)
zzedc::init(mode = "config", config_file = "aws_config.yml")

## End(Not run)
```

---

init_audit_log	<i>Initialize audit log</i>
----------------	-----------------------------

---

**Description**

Creates a reactive audit log storage with immutable properties.

**Usage**

```
init_audit_log()
```

**Value**

reactiveVal containing tibble of audit records

**Examples**

```
## Not run:
audit_log <- init_audit_log()
log_audit_event(audit_log, "user1", "LOGIN", "authentication", status = "success")

## End(Not run)
```

---

init_from_config	<i>Config File Mode: Non-Interactive Setup</i>
------------------	--

---

**Description**

Config File Mode: Non-Interactive Setup

**Usage**

```
init_from_config(config_file, project_dir = ".")
```

**Arguments**

config\_file      Path to YAML configuration file  
project\_dir      Directory where project will be created

**Value**

List with setup results

---

init_interactive	<i>Interactive Mode: Guided Setup</i>
------------------	---------------------------------------

---

**Description**

Interactive Mode: Guided Setup

**Usage**

```
init_interactive(project_dir = ".")
```

**Arguments**

project\_dir      Directory where project will be created

**Value**

List with setup results

---

init_session_timeout	<i>Initialize session timeout tracking</i>
----------------------	--

---

**Description**

Creates reactive values to track user activity and session state.

**Usage**

```
init_session_timeout()
```

**Value**

List containing reactive objects for session management

---

is_configured	<i>Check if ZZedc is Already Configured</i>
---------------	---

---

**Description**

Detect if ZZedc is being launched for the first time by checking for required configuration files. Returns TRUE if the system is fully configured.

**Usage**

```
is_configured(db_path = "../data/zzedc.db", config_path = "../config.yml")
```

**Arguments**

db_path	Path to database file
config_path	Path to config file

**Value**

Logical. TRUE if fully configured, FALSE otherwise

---

launch_setup_if_needed	<i>Launch Setup Mode if Needed</i>
------------------------	------------------------------------

---

**Description**

Checks if ZZedc is configured. If not, shows setup options. Called from app startup to intercept first-time users.

**Usage**

```
launch_setup_if_needed(  
  db_path = "../data/zzedc.db",  
  config_path = "../config.yml"  
)
```

**Arguments**

db_path	Path to database file
config_path	Path to config file

**Value**

Invisibly returns setup status

---

launch_zzedc	<i>Launch the ZZedc Shiny Application</i>
--------------	---

---

## Description

This function launches the interactive 'Shiny' application for electronic data capture (EDC) in clinical trials.

## Usage

```
launch_zzedc(..., launch.browser = TRUE, host = "127.0.0.1", port = NULL)
```

## Arguments

...	Additional arguments passed to <a href="#">runApp</a>
launch.browser	Logical, whether to launch the app in browser. Default is TRUE.
host	Character string of IP address to listen on. Default is "127.0.0.1".
port	Integer specifying the port to listen on. Default is NULL (random port).

## Details

The application provides comprehensive electronic data capture for clinical trials with the following features:

- Secure user authentication with role-based access
- Data entry forms with validation and quality control
- Comprehensive reporting system (basic, quality, statistical)
- Advanced data exploration and visualization tools
- Flexible export capabilities with multiple formats
- Modern responsive design using Bootstrap 5 via bslib

## Value

No return value, launches the Shiny application

## Examples

```
## Not run:  
# Launch the application  
launch_zzedc()  
  
# Launch on specific port  
launch_zzedc(port = 3838)  
  
# Launch without opening browser  
launch_zzedc(launch.browser = FALSE)  
  
## End(Not run)
```

```
list_available_instruments
```

*List available instruments*

---

**Description**

Returns names and metadata of all available pre-built instruments.

**Usage**

```
list_available_instruments(instruments_dir = "instruments/")
```

**Arguments**

```
instruments_dir
```

Path to instruments directory (default: "instruments/")

**Value**

data.frame with columns:

- name: Instrument ID (e.g., "phq9")
- full\_name: Full instrument name
- items: Number of items
- description: Brief description

**Examples**

```
## Not run:
available <- list_available_instruments()
print(available)

## End(Not run)
```

---

```
load_instrument_template
```

*Load instrument template from CSV*

---

**Description**

Loads a pre-built instrument template and returns as data.frame with validated structure.

**Usage**

```
load_instrument_template(instrument_name, instruments_dir = "instruments/")
```

**Arguments**

```
instrument_name
```

Name of instrument (e.g., "phq9", "gad7")

```
instruments_dir
```

Path to instruments directory



**Value**

data.frame with columns:

- field\_name: Unique field identifier
- field\_label: User-facing label
- field\_type: Input type (text, numeric, select, etc.)
- validation\_rules: JSON string with validation constraints
- description: Item description/instruction text
- required: Logical, is field required?

**Examples**

```
## Not run:
phq9_fields <- load_instrument_template("phq9")
head(phq9_fields)

## End(Not run)
```

---

log_audit_event	<i>Log an audit event</i>
-----------------	---------------------------

---

**Description**

Records an audit event with cryptographic chaining to previous record.

**Usage**

```
log_audit_event(
  audit_log,
  user_id,
  action,
  resource,
  old_value = "",
  new_value = "",
  status = "success",
  error_message = ""
)
```

**Arguments**

audit_log	reactiveVal object (from init_audit_log)
user_id	Character - user performing action
action	Character - action type (e.g., "LOGIN", "DATA_EXPORT", "FORM_SUBMISSION")
resource	Character - what was affected (e.g., "authentication", "subject_123", "report_export")
old_value	Character - previous value (for modifications)
new_value	Character - new value (for modifications)
status	Character - success/failure
error_message	Character - error details if status == "failure"

**Value**

Invisibly returns the new record (including hash)

**Examples**

```
## Not run:
audit_log <- init_audit_log()
log_audit_event(
  audit_log,
  user_id = "john.doe",
  action = "LOGIN_ATTEMPT",
  resource = "authentication",
  status = "success"
)

## End(Not run)
```

---

log_export_event	<i>Log export event to audit trail</i>
------------------	--

---

**Description**

Records data export with details for compliance audit

**Usage**

```
log_export_event(user_id, data_source, format, rows, audit_log)
```

**Arguments**

user_id	User performing export
data_source	Source of exported data
format	Export format
rows	Number of rows exported
audit_log	Audit log reactiveVal

---

notify_if_invalid	<i>Validate and notify</i>
-------------------	----------------------------

---

**Description**

Checks a condition and shows notification if false.

**Usage**

```
notify_if_invalid(condition, message, type = "warning")
```

**Arguments**

condition	Logical - condition to check
message	Character - message to show if condition is FALSE
type	Character - notification type ("message", "warning", "error")

**Value**

Invisibly returns the condition

---

paginate_data	<i>Create paginated data view</i>
---------------	-----------------------------------

---

**Description**

Prepares data for paginated display with server-side processing. Handles filtering, sorting, and pagination efficiently.

**Usage**

```
paginate_data(
  data,
  page_size = 25,
  search_term = NULL,
  sort_by = NULL,
  sort_direction = "asc",
  page_number = 1
)
```

**Arguments**

data	data.frame to paginate
page_size	Number of rows per page (default: 25)
search_term	Optional text to filter rows
sort_by	Column name to sort by
sort_direction	"asc" or "desc"
page_number	Current page (1-indexed)

**Value**

List containing:

- data: data.frame with rows for current page
- pagination: list with page info (total\_pages, total\_rows, current\_page)
- summary: summary statistics

**Examples**

```
## Not run:
paginated <- paginate_data(
  large_dataset,
  page_size = 25,
  page_number = 1
)
display_data(paginated$data)
show_page_numbers(paginated$pagination$total_pages)

## End(Not run)
```

---

```
prepare_all_files_export
```

*Prepare all files data for export*

---

**Description**

Prepare all files data for export

**Usage**

```
prepare_all_files_export(options = NULL)
```

**Arguments**

options            List of export options

**Value**

List of file data

---

```
prepare_edc_export
```

*Prepare EDC data for export*

---

**Description**

Retrieves EDC data with optional metadata and filtering

**Usage**

```
prepare_edc_export(db_conn, options = NULL)
```

**Arguments**

db\_conn            Database connection  
options            List with include\_metadata, include\_timestamps, date\_range, etc.

**Value**

data.frame with EDC export data

---

```
prepare_export_data
```

*Prepare data for export*

---

## Description

Retrieves and formats data based on export configuration. Pure function with no Shiny dependencies.

## Usage

```
prepare_export_data(data_source, format, options = NULL, db_conn = NULL)
```

## Arguments

<code>data_source</code>	Character indicating data source ("edc", "all_files", "reports", "sample")
<code>format</code>	Character specifying export format: <ul style="list-style-type: none"> <li>• "csv": Comma-separated values</li> <li>• "xlsx": Excel workbook</li> <li>• "json": JSON format</li> <li>• "sas": SAS transport file (.xpt)</li> <li>• "spss": SPSS/PSPP format (.sav)</li> <li>• "stata": Stata format (.dta)</li> <li>• "rds": R serialized object (.rds)</li> <li>• "pdf": PDF document (requires template)</li> <li>• "html": HTML document (requires template)</li> </ul>
<code>options</code>	List of export options (metadata, timestamps, date_range, etc.)
<code>db_conn</code>	Database connection (if data_source == "edc")

## Value

List containing:

- data: data.frame or list with export data
- info: metadata about export (rows, columns, size estimate)
- warnings: any issues encountered

## Examples

```
## Not run:
export_result <- prepare_export_data(
  data_source = "edc",
  format = "csv",
  options = list(include_metadata = TRUE, include_timestamps = TRUE)
)

## End(Not run)
```

---

`prepare_reports_export`*Prepare reports data for export*

---

**Description**

Prepare reports data for export

**Usage**

```
prepare_reports_export(options = NULL)
```

**Arguments**

`options`            List of export options

**Value**

List of report data

---

`prepare_sample_export`    *Prepare sample data for export*

---

**Description**

Prepare sample data for export

**Usage**

```
prepare_sample_export(options = NULL)
```

**Arguments**

`options`            List of export options

**Value**

data.frame with sample data

---

query_audit_log	<i>Query audit log</i>
-----------------	------------------------

---

**Description**

Filter audit log by various criteria.

**Usage**

```
query_audit_log(  
  audit_log,  
  user_id = NULL,  
  action = NULL,  
  resource = NULL,  
  start_date = NULL,  
  end_date = NULL  
)
```

**Arguments**

audit_log	reactiveVal or data.frame containing audit records
user_id	Character - filter by user (optional)
action	Character - filter by action type (optional)
resource	Character - filter by resource (optional)
start_date	Date - start of date range (optional)
end_date	Date - end of date range (optional)

**Value**

Filtered data.frame

---

renderPanel	<i>Render form panel with typed input fields</i>
-------------	--

---

**Description**

Generates appropriate input controls based on field metadata. Supports 15+ field types including text input, numeric fields, dates, times, email, selection lists, radio buttons, checkboxes, text areas, sliders, file uploads, and digital signatures for flexible data collection.

**Usage**

```
renderPanel(fields, field_metadata = NULL)
```

**Arguments**

fields	Character vector of field names OR list of field configurations
field_metadata	List containing field definitions with type, required, choices, etc.

**Details**

Field metadata format: `list( age = list(type = "numeric", required = TRUE, min = 0, max = 150), email = list(type = "email", required = TRUE), treatment = list(type = "select", choices = c("A", "B", "C")), visit_date = list(type = "date", required = TRUE), visit_time = list(type = "time", required = TRUE), pain_level = list(type = "slider", min = 0, max = 10, value = 5), symptoms = list(type = "checkbox_group", choices = c("Pain", "Fever", "Cough"))) )`

**Value**

List of Shiny input controls matching field types

**Examples**

```
## Not run:
metadata <- list(
  age = list(type = "numeric", required = TRUE, label = "Age (years)"),
  gender = list(
    type = "select",
    choices = c("M", "F"),
    label = "Gender"
  ),
  pregnancy_date = list(
    type = "date",
    label = "Pregnancy Due Date",
    show_if = "gender == 'F'" # Branching logic
  ),
  visit_time = list(type = "time", required = TRUE, label = "Visit Time")
)
renderPanel(names(metadata), metadata)

## End(Not run)
```

---

`rotate_encryption_key` *Rotate Database Encryption Key via AWS KMS*

---

**Description**

Rotates the active encryption key by archiving the old key and activating a new one. This function is used for planned key rotation in production environments.

**Usage**

```
rotate_encryption_key(new_key)
```

**Arguments**

`new_key` Character: New 64-hex-character encryption key (from `generate_db_key`)



## Details

Key Rotation Procedure:

1. Validate new key format (64 hex chars, lowercase)
2. Retrieve current key from AWS Secrets Manager
3. Archive current key with timestamp metadata
4. Store new key as active in AWS Secrets Manager
5. Return rotation confirmation with version IDs

After key rotation, the database must be re-encrypted with the new key.

## Value

List with rotation status:

- success: Logical TRUE if rotation successful
- old\_key\_archived: Logical TRUE if old key saved
- new\_key\_active: Logical TRUE if new key now active
- timestamp: Rotation timestamp
- old\_version\_id: AWS version ID of archived old key
- new\_version\_id: AWS version ID of new key
- message: Human-readable status message
- error: Error message if rotation failed

## Examples

```
## Not run:
new_key <- generate_db_key()
result <- rotate_encryption_key(new_key)
if (result$success) {
  cat("Key rotation successful\n")
}

## End(Not run)
```

---

safe\_reactive

*Safe reactive expression evaluation*

---

## Description

Wraps reactive expression with error handling to prevent app crashes from reactive errors.

## Usage

```
safe_reactive(expr, on_error = NULL, on_empty = NULL)
```

**Arguments**

expr	Expression to evaluate reactively
on_error	Function to call on error (or value to return)
on_empty	Function or value for empty results

**Value**

Reactive expression result or error value

---

save_validated_form	<i>Save validated form data to database</i>
---------------------	---

---

**Description**

Saves validated and cleaned form data with audit logging

**Usage**

```
save_validated_form(conn, table_name, cleaned_data, user_id, audit_log = NULL)
```

**Arguments**

conn	Database connection
table_name	Table to insert into
cleaned_data	Validated data from validate_form()
user_id	User submitting the form
audit_log	Optional audit log to record submission

**Value**

List with success status and record ID

---

setup_aws_kms	<i>Setup AWS KMS Integration for ZZedc</i>
---------------	--

---

**Description**

Initializes and validates AWS KMS configuration for production key management. Checks AWS credentials, region, and permissions before returning setup status.

**Usage**

```
setup_aws_kms()
```

## Details

AWS KMS Setup Requirements:

1. AWS credentials configured:
  - ~/.aws/credentials file, OR
  - AWS\_ACCESS\_KEY\_ID and AWS\_SECRET\_ACCESS\_KEY environment variables
2. AWS region configured:
  - AWS\_REGION environment variable, OR
  - ~/.aws/config file with [default](#) region
3. IAM permissions required:
  - secretsmanager:CreateSecret (for initial setup)
  - secretsmanager:GetSecretValue (for key retrieval)
  - secretsmanager:PutSecretValue (for key rotation)
  - secretsmanager:DeleteSecretVersion (for archiving)

Default secret name: "zzedc/db-encryption-key"

## Value

List with AWS KMS configuration status:

- aws\_configured: Logical TRUE if AWS KMS properly configured
- region: AWS region (from config or env var)
- credentials\_found: Logical TRUE if AWS credentials available
- secret\_exists: Logical TRUE if default secret exists
- permissions: List with permission check results
- errors: Character vector of any setup errors
- message: Human-readable status message

## Examples

```
## Not run:
status <- setup_aws_kms()
if (status$aws_configured) {
  cat("AWS KMS ready for key management\n")
} else {
  cat("Setup errors:", status$errors, "\n")
}

## End(Not run)
```

---

setup\_form\_validation *Create server-side form validation observer*

---

**Description**

Sets up reactive validation that updates UI in real-time

**Usage**

```
setup_form_validation(  
  session,  
  form_fields,  
  field_metadata,  
  error_container_id = "form_errors"  
)
```

**Arguments**

session	Shiny session object
form_fields	Character vector of form field names
field_metadata	List with field validation rules
error_container_id	ID of element to display errors

---

setup\_pagination\_observers  
*Setup pagination observers*

---

**Description**

Creates reactive observers to handle pagination navigation

**Usage**

```
setup_pagination_observers(  
  session,  
  data_reactive,  
  current_page,  
  input_id = "data"  
)
```

**Arguments**

session	Shiny session object
data_reactive	Reactive expression returning current data
current_page	Reactive value holding current page number
input_id	Namespace ID for pagination inputs

---

sort_data	<i>Sort data frame</i>
-----------	------------------------

---

**Description**

Sorts data by specified column

**Usage**

```
sort_data(data, sort_column, direction = "asc")
```

**Arguments**

data	data.frame to sort
sort_column	Column name
direction	"asc" or "desc"

**Value**

Sorted data.frame

---

success_response	<i>Create standardized success response</i>
------------------	---

---

**Description**

Returns a consistent success response structure.

**Usage**

```
success_response(message = "Success", data = NULL)
```

**Arguments**

message	Character - success message
data	List - data to return

**Value**

List with success=TRUE and message

---

test_encryption	<i>Test database encryption</i>
-----------------	---------------------------------

---

**Description**

Creates a test encrypted database, writes data, reads it back, and verifies encryption is actually being applied (file is binary, not plaintext).

**Usage**

```
test_encryption(db_path, key)
```

**Arguments**

db_path	Character: Path to test database file (will be created and deleted)
key	Character: Encryption key to test

**Details**

Test procedure:

1. Connect to database with key
2. Write test data
3. Disconnect
4. Verify file is encrypted (random bytes, not readable text)
5. Reconnect with correct key -> data readable
6. Verify data integrity
7. Cleanup temporary database

This function verifies that SQLCipher is properly compiled into RSQLite.

**Value**

Logical TRUE if all tests pass, otherwise stops with error

**Examples**

```
## Not run:  
key <- generate_db_key()  
test_encryption(tempfile(fileext = ".db"), key)  
  
## End(Not run)
```

---

`update_session_activity`*Manual session activity update*

---

**Description**

Explicitly update last activity time. Useful when activity isn't captured through normal input changes.

**Usage**

```
update_session_activity(session_tracker)
```

**Arguments**

`session_tracker`

Object returned from `init_session_timeout()`

---

`validate_field_value`    *Validate individual field value*

---

**Description**

Type-specific validation for a single form field

**Usage**

```
validate_field_value(field_name, value, type, rules)
```

**Arguments**

`field_name`      Character name of field

`value`            Value to validate

`type`             Field type (text, numeric, date, email, select, checkbox)

`rules`            List of validation rules

**Value**

List with valid, message, cleaned\_value, warning

---

validate_filename	<i>Validate and Sanitize Filename</i>
-------------------	---------------------------------------

---

**Description**

Sanitizes a filename by removing or replacing problematic characters, preventing path traversal attacks, and limiting length

**Usage**

```
validate_filename(filename, max_length = 100)
```

**Arguments**

filename	Character string to sanitize
max_length	Maximum filename length (default 100)

**Value**

Sanitized filename safe for use in file operations

---

validate_form	<i>Validate entire form submission</i>
---------------	--

---

**Description**

Validates all form fields against metadata rules. Returns detailed validation results suitable for user feedback.

**Usage**

```
validate_form(form_data, field_metadata)
```

**Arguments**

form_data	List or data.frame with submitted form values
field_metadata	List defining validation rules for each field

**Value**

List with:

- valid: logical, TRUE if all validations passed
- errors: named list of field-specific error messages
- warnings: named list of field-specific warnings
- cleaned\_data: validated and cleaned data



## Examples

```
## Not run:
metadata <- list(
  age = list(type = "numeric", required = TRUE, min = 18, max = 120),
  email = list(type = "email", required = TRUE)
)

result <- validate_form(
  list(age = 25, email = "user@example.com"),
  metadata
)

if (result$valid) {
  # Process the cleaned data
  save_record(result$cleaned_data)
} else {
  # Show errors to user
  show_validation_errors(result$errors)
}

## End(Not run)
```

---

validate\_instrument\_csv

*Validate instrument CSV structure*

---

## Description

Checks that a CSV file has correct structure for import. Used for validation before accepting user uploads.

## Usage

```
validate_instrument_csv(filepath)
```

## Arguments

filepath	Path to CSV file to validate
----------	------------------------------

## Value

List containing:

- valid: Logical, structure is valid?
- errors: Character vector of validation errors
- warnings: Character vector of warnings
- field\_count: Number of fields in file

---

verify_audit_log_integrity	<i>Verify audit log integrity</i>
----------------------------	-----------------------------------

---

**Description**

Validates that audit log hasn't been tampered with by checking hash chain. Returns TRUE if all hashes are correctly chained, FALSE otherwise.

**Usage**

```
verify_audit_log_integrity(audit_log)
```

**Arguments**

audit_log	reactiveVal or data.frame containing audit records
-----------	--

**Value**

Logical - TRUE if log integrity verified, FALSE if tampering detected

---

verify_db_key	<i>Verify database encryption key format</i>
---------------	--

---

**Description**

Validates that a key is properly formatted for SQLCipher. Checks length, characters, and format.

**Usage**

```
verify_db_key(key)
```

**Arguments**

key	Character string: The key to validate
-----	---------------------------------------

**Details**

Valid format requirements:

- Exactly 64 hexadecimal characters (256 bits)
- All lowercase a-f and 0-9
- Single string (length 1)

Invalid keys will stop execution with descriptive error message.

**Value**

Logical TRUE if valid, otherwise stops with error message

## Examples

```
## Not run:
key <- generate_db_key()
verify_db_key(key) # Returns TRUE

## End(Not run)
```

---

%%

*Null Coalesce Operator*

---

## Description

Null Coalesce Operator

## Usage

`x %% y`

## Arguments

<code>x</code>	First value
<code>y</code>	Default value if <code>x</code> is NULL

## Value

`x` if not NULL, otherwise `y`

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