Enter: Entering and Editing Data in Epi Info[™]

Introduction

The Enter module allows users to enter data into forms constructed in Form Designer. Enter conducts the data entry process according to the settings and Check Code specified in Form Designer. Information entered into the form is stored in Microsoft Access or Microsoft SQL server data tables.

Enter can be used to enter new data, modify existing data, or search for records. When data are entered into a form, the data table inside the project is populated. The Find function allows records to be located based on a series of matched variables. As data are entered, the cursor moves according to the tab order from field-to-field, page-to-page, and saves data when navigating to a new page. If you try to exit a page before data is saved, you will be prompted to save the data (Yes or No).

Open a Project and Form

To access the Enter program, click the **Enter Data** button on the Epi InfoTM main menu or select **Tools > Enter Data** from the toolbar. In Form Designer, access the Enter module by clicking the **Enter Data** button in the toolbar. This button is a convenient method to switch between designing a form and entering data to test the form design.

There are three options available to open a project and form. The following example uses the **Food History** form available in the **EColi** project.

1. From the toolbar, select **File > Open Form.**



Figure 4.1: Open Form

2. Alternatively, click **Open Form** from the toolbar,

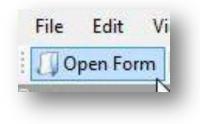


Figure 4.2: Open Form

3. These two options will display the **Open Form** dialog box.

Current Project	
C:\Users\cpalazzola\Epi Info 7\Projects\E	Coli\EColi.prj
Forms	
FoodHistory FoodHistory_NoCheckCode	
	OK Cancel

Figure 4.3: Open Form dialog box

- 4. Click the **ellipses** button next to the Current Project field to browse for a project. Select **EColi** from the folder. The project file path displays in the Current Project field and a list of available forms in that project appear in the Forms field.
- 5. Select the desired form (FoodHistory) from the Forms field.
- 6. Click **OK**. The project and form display with the first record in the project appearing on the canvas.

For quick access to a project recently opened with the Enter module, use the Recent Forms option.

1. From the toolbar, select **File > Recent Forms**.

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Figure 4.4: Open Recent Form

2. Select the path file containing the desired project and form. The project and form display with the first record in the project appearing on the canvas.

	Page 1					
odHistory Page 1 Page 2	CDC E.	Coli O1	57:H7 Food His	tory Ques	uvillane	EPARTMENT OF HEALTH I SERVICES for Disease Control ention
	Case ID		Date of Interview			
	1		5/9/2011		All data contained hereir	n are fictional
	Demographic Informat	tion				
	First Name		Last Name		Sex	
	Anna		Moore		F-Female	-
	DOB	Age	Ethnicity Group			
	1/12/1982			*		
Records 7	🔲 Black 🛄 Asian	🔄 America 📰 Multirac	n Indian/Alaskan Native ial			
party reconstruction and	Address			State		
Description of the second s	Address			GA		
ndHistory	Address		Latitude:	GA Longitude		
Description of the second s			33.587	GA		
dHistory	Occupation			GA Longitude		
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dHistory	Occupation Business exec		33.587 Email Address	GA Longitude -83.466	Duration of Symptom	5

Figure 4.5: Enter Workspace

Navigating the Enter Workspace

There are five main areas in the Enter workspace: Pages, Linked Records, Canvas, Toolbar, and Status Bar. The figure below displays all five areas with information contained in the **FoodHistory** form of the **EColi** project.

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	13	Business executive Symptoms and Illness	33.587 Email Address	Longitude -83.466	Duration of Symptoms

Figure 4.6: Enter Workspace

Pages

The **Pages** panel in the top left corner lists all pages associated with the current form. Users may navigate to different pages in the form by selecting the desired page in the **Pages** panel.

Linked Records

The **Linked Records** panel in the bottom left is used to conduct contact tracing. It contains information about which records have been exposed to or from the current record.

1. **Exposed From** – Displays additional records that the current record has been exposed or affected from. The **Exposed From** icons appear with the Case ID number of the record. Place the mouse over the record to preview the record information.



Figure 4.7: Exposed From - Record Preview

- Double-click on the record to jump to that record and view additional information
- 2. **Exposed To** Displays other records that the current record has been in contact with or possibly affected since acquiring the illness. **The Exposed To** icons appear with the Case ID number of the record.

oxposed From	Exposed To	
FoodHistor	y hờ	
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- Similar to the **Exposed From** tab, users can preview information or jump to the record by double-clicking the icon.
- 3. Add Exposure Identifies additional exposures (To and From) for the current record. To add an Exposure To, click Add Exposure in the Exposure To tab. To add an Exposure From, click Add Exposure in the Exposure From tab.
 - Select the form that the exposure record is contained. Click OK.

Please select a	Form:		_
FoodHistory FoodHistory_No	CheckCode		
	OK	Cancel	

Figure 4.9: Add Exposure from Form

• Find the desired exposure information with Find (information regarding the Find function is located in the Find Records section). Double click on search results to add the exposure to the record.

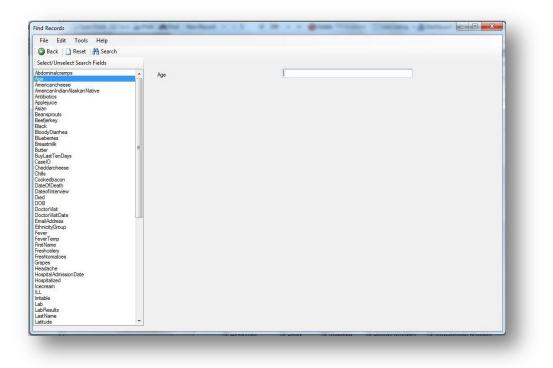


Figure 4.10: Add Exposure from Record

4. **SNA graph** – Social Network Analysis (SNA) displays the exposed to and from records graphically with the current record in red.

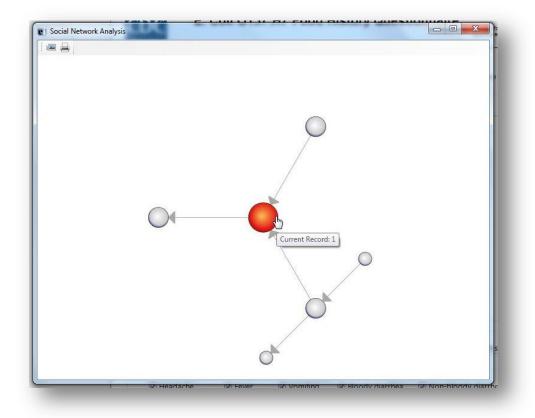


Figure 4.11: SNA Graph

- The SNA graph directionally shows the flow of exposure at multiple levels. For example, the current record has two records that it has been exposed from; however, one of those records has been exposed from two more records.
- The SNA graph also displays that the current record has been exposed to another record. This is consistent with the information contained in the **Exposed From** and **Exposed To** tabs.
- The SNA graph can be saved as an image or printed using the buttons in the top left corner of the screen.

Canvas

The **Canvas** shows the current page in the form with all record information displayed. The canvas is where data entry and editing occurs.

Toolbar

The **Toolbar** at the top of the screen contains buttons to navigate through the records, create new records, open the Dashboard, open the mapping tool, save the current record, view records in a line list, and print.

• Line List – allows users to view and search records using the Dashboard interface. Also, users can view the data in MS Excel and HTML formats. For additional information, reference the Visual Dashboard section of the user guide.

	CaselD [Dateofinterview	FirstName	LastName			Age	EthnicityGroup	White	NativeHawaiianOtherPacif	UnknownOther	Black	AmericanIndianAlaskanNat	Asian	Multiracial	PatientAddress	State	Latitude	Longitude	Occupation
1	247	5/11/2011	Missing	Jackson	M-Male	1/1/1986	25	Missing	No	No	Yes	No	No	No	No	Missing	GA	33.594	-83.475	Software develo
2	277	5/13/2011	Missing	White	F-Female	10/4/1980	30	Missing	No	No	No	No	No	No	Yes	Missing	GA	33.627	-83.61	Manufacturing
3	61	5/18/2011	Missing	Johnson	F-Female	3/11/1963	48	Missing	No	No	Yes	No	No	No	No	Missing	GA	33.585	-83.175	Unemployed
4	258	5/12/2011	Missing	Williams	F-Female	4/19/1991	20	Missing	No	No	No	No	Yes	No	No	Missing	GA	33.603	+83.63	Police officer
5	127	5/24/2011	Missing	Smith	F-Female	3/20/1987	24	Missing	Yes	No	No	No	No	No	No	Missing	GA	33.575	-83.185	Sales
6	323	5/14/2011	Missing	Brown	F-Female	2/4/1959	52	Missing	No	No	No	Yes	No	No	No	Missing	GA	33.603	-83.472	Lawyer
7	152	5/11/2011	Missing	Davis	M-Male	9/16/1951	59	Missing	No	No	No	No	Yes	No	No	Missing	GA	33.587	-83.45	Scientist
8	66	5/7/2011	Missing	Miller	M-Male	1/1/1990	21	Missing	No	No	No	No	Yes	No	No	Missing	GA	33.627	-83.61	Student
9	70	5/12/2011	Missing	Wilson	M-Male	1/1/1980	31	Missing	Yes	No	No	No	No	No	No	Missing	GA	33.587	-83.469	Sales
10	233	5/10/2011	Missing	Moore	M-Male	10/10/1967	43	Missing	No	Yes	No	No	No	No	No	Missing	GA	33.566	-83.495	Food service wo
11	275	5/13/2011	Missing	Taylor	F-Female	9/2/1958	52	Missing	No	No	No	No	No	No	Yes	Missing	GA	33.588	-83.48	Researcher
12	224	5/3/2011	Missing	Anderson	F-Female	9/3/1992	18	Missing	No	No	No	No	No	No	Yes	Missing	GA	33.59	-83.47	Clerk
13	116	5/18/2011	Missing	Thomas	M-Male	6/6/1950	60	Missing	Yes	No	No	No	No	No	No	Missing	GA	33.588	-83.474	Civil engineer
14	312	5/14/2011	Missing	Jackson	M-Male	2/28/1982	29	Missing	No	No	Yes	No	No	No	No	Missing	GA	33.56	-83.479	Missing
15	300	5/13/2011	Missing	White	M-Male	1/1/1989	22	Missing	No	Yes	No	No	No	No	No	Missing	GA	33.514	-83.696	Missing

Figure 4.12: Line List View

• **Print** – allows the user to print the form and specify customized parameters.

lect Records	Select Pages
No Records (Blank Form)	All Pages
Current Record Record Range -	Page Range
All Records	
ſ	Print Preview Cancel

Figure 4.13: Print dialog box

• To create a PDF version of the form using the print function select **Preview**. In the **Print Preview** window select **Print** and chose the appropriate PDF writer as the printer.

Note: The ability to print to a PDF requires PDF writer software.

Printer		300	
Name:	WebEx Document Loader	-	Properties
Status:	\\usdel2132\Lounge2		
Type: Where: Comment:	eDocPrinter PDF Pro Fax Microsoft XPS Document Writer Snagit 10 WebEx Document Loader		🗖 Print to file
^o rint range		Copies	
o Al		Number of cop	oies: 1 🌲
Pages	from: to:		
Selection		123 1	23 √ Collate
		ОК	Cancel

Figure 4.14: Create PDF

- Navigation Buttons Navigation is provided for using the New Record button and navigation buttons for, next (D), previous (), first (), and last () records. The user may also manually type the record ID number into the record list to jump to that record. When entering data into a child form, use the "Back" button to return to the parent form.
- **Maps** Entering Maps from the Enter module allows for some additional functionality between Maps and the project data. The additional functionality allows the user to view case data in the Enter module from the Map window. The following example demonstrates how to create a case cluster map using the FoodHistory form data in the Ecoli project. For additional information regarding maps, reference the Maps section of the user guide.
- 1. Click Maps from the toolbar. The Maps main window appears.

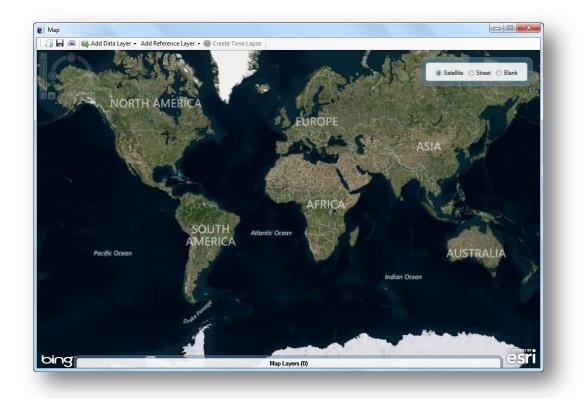


Figure 4.15: Main Map Window

2. Select Add Data Layer > Case Cluster from the toolbar.

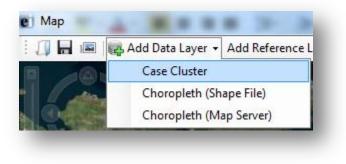


Figure 4.16: Case Cluster

3. In the external data dialog box, select No.

Data source	1000	×
Use external data?		
Yes	No	,

Figure 4.17: Data Source

- 4. Select the field containing the Latitude coordinates (Latitude) from the Latitude drop-down list.
- 5. Select the field containing the Longitude coordinates (Longitude) from the Longitude drop-down list.

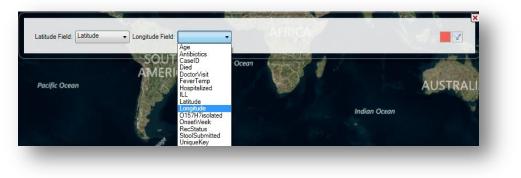


Figure 4.18: Latitude and Longitude Fields

6. The case cluster map appears displaying each record's location on the map.

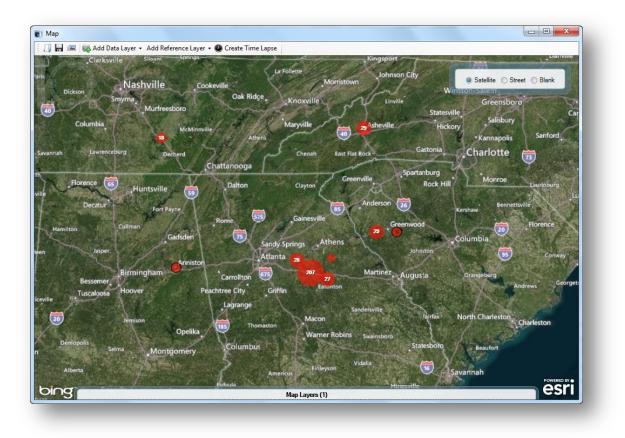


Figure 4.19: Case Cluster Map

7. To view the information associated with each record on the map, double-click on a single red dot. The record appears in the Enter data window.

Note: Zoom in on the record of interest to separate the case clusters into single dots.

ase ID		Date of Interview			
84		5/13/2011		All data contain	ed herein are fictional
nographic Information				Air data containt	eu nerein are notional
First Name		Last Name		Sex	
		Dixon		M-Male	•
DOB	Age	Ethnicity Group			
10/10/1978	32		•		
		Latitude:	Longitude		
Address			State GA		
		Latitude:	Longitude		
		33.784	-83.139		
1		Email Address			
Occupation					
Occupation Consultant					
· ·					
Consultant		Symptom Onset	Date Onset Week	Duration of Sy	mptoms
Consultant	•	Symptom Onset 5/6/2011	Date Onset Week	Duration of Sy	mptoms
Consultant ptoms and Illness Was the patient ill?	▼ ▼ Fever			Duration of Sy	
Consultant ptoms and Illness Was the patient ill? Yes	✓ ✓ Fever □ Chills	5/6/2011	14		/ diarrhea

Figure 4.20: Case Record

Status Bar

The **Status Bar** at the bottom of the screen displays selected information about the field that the cursor is currently located. The status bar can be hidden by deselecting **View > Status Bar** in the toolbar.

0 Open	For	V	S	tatus Bar	i.	and the
ages			_	pi Info <u>L</u> o		5

Figure 4.21: Status Bar

Check Code Options

The Enter module allows the user to modify the Check Code features when entering data. Both Check Code options are available under Tools in the toolbar and are enabled by default.

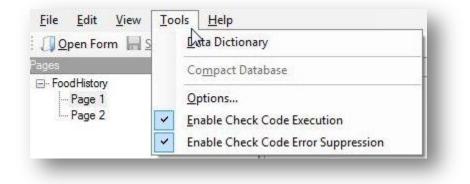


Figure 4.22: Check Code Options

- Enable Check Code Executions Unchecking this option will disable all check code when entering data into the form
- Enable Check Code Error Suppression Unchecking this option will not display error messages in check code

Import Data

There are multiple options available to import data from external sources into the Enter module. These options are available under **File > Import Data** in the toolbar.

le	Edit View Too	ls Hel	р	
	New Record		0	Find New Record 😣 🔹
	Open Form Ctrl	+0		Page 1
	Edit Form			
	Close Form Alt-	-F4		
	Save Ctr	I+S		
	Import data		-	From phone
	Package for transport		2	From web
	Print Ctrl	+ P		From form
	Recent Forms	•	_	From data package
	Exit			

Figure 4.23: Import Data

• **From form** – This feature requires a Epi Info project file (.prj) and data (.mdb if data tables formed in Microsoft Access).

- Browse for the Epi Info project file by clicking the ellipses next to the **Project** containing the data to import field. Select the .prj file
- Select the Form from the Form data to import drop-down list.

ecord's GlobalF natches a recor	ess will merge records from a similar or identical Epi Info 7 form based on each RecordId value. Records in the destination form whose GlobalRecordId value d in the source form will be updated, and unmatched records will be appended. in only the source form or only the destination form will be ignored.
🔔 Warning:	Import operations are permanent and cannot be undone. Be sure the form structures are the same before proceeding. If a different field is needed as the match key, please use the Classic Analysis module to conduct the import.
Import informati	on
Project contair	ning the data to import:
-	
Form data to i	mport:
	•
Type of impor	t
Update and ap	ppend records 🔻
4/25/2013 5:35	
4/25/2013 5:35:	20 PM: Loaded data import dialog. Ready.
4/25/2013 5:35: Ready	20 F M. EDaded data import dialog, rieady.

Figure 4.24: Import Data from Form

- Select the Import Type from the Type of import drop-down list.
 - **Update and append records** Records in the destination form containing the same GlobalRecordId values as the source form will be updated (overwritten) if there is new information. However, values in the destination table will never be overwritten with a null or missing value. All other records will be appended (added) to the end of the table.
 - **Update records only** Records in the destination form containing the same GlobalRecordId values as the source form will be updated (overwritten) if there is new information. However, values in the destination table will never be overwritten with a null or missing value. All other records will be ignored.
 - Append records only All records in the source form will be appended (added) to the end of the table. No records will be updated (overwritten).
- Click **Import**. *Import Complete* will appear at the bottom of the dialog box upon successful completion of the import.

- Click **Close**. The data is imported into the Enter module.
- **From mobile device** for information regarding this feature, reference the Companion for Android section of this user guide.
- **From web** for information regarding this feature, reference the Web Survey section of this user guide.
- **From data package** for information regarding this feature, reference the Data Packager section of this user guide.

Enter Data in a Form

New Record

1. With a form and project open, select **New Record** from the toolbar or **File > New Record**. A blank record is added to the end of the record list and displays in the canvas. Place the **cursor** in the data entry field.

2. Enter **data** into each field. Use the **Tab** or **Enter** key to move to the next field. Moving from one field to another will execute Check Code.

- As records are navigated, data are saved automatically. After completing the last field on a page, the cursor automatically jumps to the next page in the sequence.
- Field properties that were defined in Form Designer, (e.g., Read Only, Required Range) are enforced during data entry.
- Drop-down lists and code tables created in Form Designer are enforced.
- Multiline Fields automatically scroll when filled with text to hold up to 1 gigabyte of information.
- Plain text fields automatically scroll when filled with text to hold up to 255 characters per field.

Edit Record

- 1. Navigate to the desired record using the navigation tools in the toolbar.
- 2. Place the **cursor** in the desired data entry field.
- 3. Enter **data** into each field that needs to be updated. Use the **Tab** or **Enter** key to move to the next field. Moving from one field to another will execute Check Code.

Delete Record

- 1. Navigate to the desired record using the navigation tools in the toolbar.
- 2. Select the **Delete** button in the toolbar, or select **Edit > Mark as Deleted**.

3. The record is grayed out and removed from any analysis performed in Visual Dashboard and Classical Analysis.

Undelete Record

- 1. Navigate to the desired deleted record using the navigation tools in the toolbar.
- 2. Select the **Undelete** button in the toolbar, or select **Edit > Undelete**.
- 3. The record is enabled and will be available for analysis in Visual Dashboard and Classical Analysis.

Insert an Image in a Record

- 1. Click the Image Field. The Select the Picture File dialog box opens.
- 2. Select an **image file**.
- 3. Click **Open**. The selected image appears in the field.

ei Enter - [TestingForm\Form5]		\Box
File Edit View Tools Help		
🕴 🕼 Open Form 🔚 Save 🚔 Print 🍂 F	ind New Record H 🔸 * of 0 > > H 🕢 Delete <table-cell-rows> Undelete 🔤 Line Listing 👻 🏥 Dashboard</table-cell-rows>	Ŧ
Pages	Page 3	
⊡-Form5 Page 1		4
Page 2		
Page 3		
	Was an XRay done?	
Linked Records 4	Please Insert X-Ray Image	
Exposed From Exposed To		
Unlink Add Exposure		
View SNA Graph		-
[Name:WasanXRaydone][Type:YesNo]		
[INdifie.vvasan/Raydone] [Type: résNo]	7.1.4.0 CAPS NUM INS	

Figure 4.25: Insert Image

Save a Page or Record

The Enter module saves data automatically as the user moves from page-to-page. Data are also saved when navigating to another record. You can move out of a record by tabbing out of the last field of the last page or clicking **New Record** from the toolbar to open a new record. Records can also be saved manually.

There are three ways to save the current record manually:

- 1. Click **Save** from the toolbar.
- 2. Select **File > Save**.
- 3. Press **Ctrl+S** from the keyboard.

Find Records

Find can search for a record matching any field value or combination of field values. If a form has more than 255 fields and more than one associated data table, only the first data table will be searched with the find feature. As a result, only the fields in the first data table will populate in the search results.

Find Records Matching a Specified Criteria

The example below demonstrates how to find records in the **FoodHistory** from in the **EColi** project.

1. From the toolbar, select the **Find** icon or **Edit** > **Find**. The Find Records window opens.

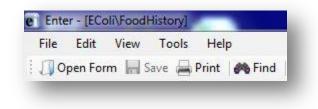


Figure 4.26: Find Record

- 2. The **Select/Unselect Search Fields** list displays on the left side of the Finds Records window with all fields contained in the form. Click on a field name to select one or more fields. The selected search fields will turn blue and populate the gray area to the right of the list.
- 3. To unselect a field, click on the selected field highlighted in blue. The field will no longer be highlighted and is removed from the search criteria.

<u>F</u> ile <u>E</u> dit <u>T</u> ools <u>H</u> elp ③ <u>B</u> ack <u>]</u> <u>R</u> eset] Search		
Back] Reset A Search		
Select/Unselect Search Fields		
bdominalcramps	Age	
ge mericancheese	2.5	
merican Indian Alaskan Native ntibiotics pplejuice sian	FeverTemp	###.#
leansprouts leefjerkey lack		
loodyDianhea lueberries		
kreastmilk kutter ⊑ kuyLastTen Days		
aseID heddarcheese hills		
cookedbacon DateOfDeath		
DateofInterview Died DOB		
DoctorVisit DoctorVisitDate		
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Figure 4.27: Find Records Window

- 4. Enter the search criteria for each field and click **Search**. Note that certain fields require specific formatting for the search criteria. If more than one field is selected, the search will display records that match all search criteria. This is considered an "AND" search.
 - Yes/No fields can only be searched with the parameters (+), (-) or (.). The parentheses are required.
 - Checkbox can only be searched with the parameters (+) or (-). The parentheses are required.
 - Date fields can only be searched with the date format MM/DD/YYYY.
 - Comment Legal can only be searched with the code (i.e. F- Female, search for F)
 - Option boxes do not store the option labels and therefore must be searched according to the integer that corresponds to each option. In an option box, the first option available corresponds to 0, the second option corresponds to 1, etc. Enter the corresponding value into the search criteria.

- Number fields will only accept values but do not require a decimal point if the field format specifies a decimal value.
- Click **Reset** to begin a new search. Note that more than one field can be searched at a time.
- Click **Back** or the close (X) button to return to the Enter workspace.
- 5. Open a record by double-clicking the **arrow** on the chosen row. The record displays in the Enter Data workspace.

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Additional Search Features

- Embedded text items in multiline and text fields can be found by searching for *word* where "word" is the text string being sought. This type of search is called a Wild Card search. In a Wild Card search, the asterisk represents any letter or string of letters (i.e., a search for DIAGNOSES *heart* would identify all records for a large text field called DIAGNOSES which contained the word "heart)."
- Dates and numeric fields can be searched using less than or greater than values (<>).

- 3. Only "OR" can be used to search for matches based on more than one criteria in the same field (i.e. searching last names, Smith OR Doe will return records containing both Smith or Doe. The search field must contain "OR" to perform the desired search. Search criteria cannot be separated by a comma.
- 4. Searches are not case sensitive and are designed to be more inclusive than exclusive.

Printing Forms

Users can print a blank copy of the form or a copy of the form with data if needed. In order to print the form, please complete the following steps:

- 1. Open your Epi Info 7 project and form in the Enter Data module.
- 2. Click on the PRINT option. The following window will be displayed:

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Print Preview Cancel

Figure 4.29: Print dialog window

- a. To print a copy of the form without including the data that has been entered, just click the PRINT button
- b. To print a copy of the form including the data that has been entered for the current record, click on the CURRENT RECORD radio button, and the click the PRINT button. This will print the form with the data for the current record.
- c. To print a copy of the form including the data that has been entered for a range of records, click on the RECORD RANGE radio button, and then specify the record number for the records that you want to print the data. When done, click the PRINT button. This will print the form with the data for the records specified.

- d. To print a copy of the form including the data for all records, click on the ALL RECORDS radio button, and the click the PRINT button. This will print the form with the data for all records in the database.
- 3. To print an electronic copy of the form without any data, click on the PREVIEW button.

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Figure 4.30: Print Preview dialog window

4. Click on the printer icon button.

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Figure 4.31: Select Printer dialog window

5. Select PDF writer or any other option that allows the creation of an electronic copy of a document.