

Using Epi Info™ 7 Templates

Introduction :

You might want to save certain fields for use on forms you will create later, as opposed to having to create those same fields over and over (think of case demographic information that is likely to appear on multiple forms for different types of outbreaks). Also, you might want to save a whole form or a project that you can then use to share with your colleagues. Epi Info™ 7 allows you to do this using a feature called **Templates**.

The following video demonstrates how to create a project level template.

<http://www.youtube.com/watch?v=1tgzk6BedTI&list=PL9B9157E47AB3FDFA&index=20>

Working with project-level templates

You could transfer the Epi Info™ 7 project files from your computer to the other computers that will be used. A thumb drive or e-mail might be sufficient for this. However, a direct transfer of the project files may present you with several problems:

- ❖ If the underlying database type for the project is Microsoft Access, then attaching the database file to an e-mail may cause the e-mail to be blocked due to the file type. Also, very large forms may exceed the file size limits on certain e-mail systems.
- ❖ If the underlying database type for the project is Microsoft SQL Server, then the database cannot be attached to an e-mail message or copied to a thumb drive at all.
- ❖ If you have already started to collect data, then attaching the database to the e-mail will send the recipient both the form *and* the data that you have already collected.
- ❖ Both the .prj file and the .mdb database file must be sent. Many users aren't aware that both files are required. Any confusion that results from an incomplete transmission (i.e., only one of the two files was sent) could result in delays.

While some of these issues can be overcome, the recommended way of dealing with these problems is to use project-level templates. Once a project-level template has been created, it

can be e-mailed to your colleagues without fear of being blocked due to file type restrictions or file size limitations, it won't contain any data that has been collected, it can be used with both Microsoft Access and Microsoft SQL Server database types, and it is contained in a single file.

Creating a project-level template

Unlike a field-level template, a project-level template encompasses the entire project, including all the forms in the project, all the pages on each of the forms, and all data entry validation logic. Follow the steps below to create a project-level template from the form you have just created:

1. Right-click the project name on the Project Explorer (for example **SalmonellaExample**). A context menu appears. (**SalmonellaExample** is the name of the project.)
2. Select **Save Project as Template** from the context menu (Figure 1). The **Save Project as Template** dialog opens.
3. Type "DemoProjectTemplate1" into the **Template Name** field (you can assign any name you desire).
4. Click **OK**.

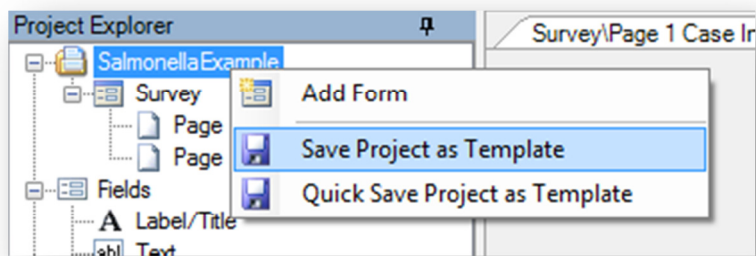


Figure 1

Sending a project template to a colleague

After completing step 4, the project will appear underneath **Projects** in the Project Explorer. It's now time to send the project template to the investigators so they can start collecting data. Follow the steps below to find the file so it can be attached to an e-mail message or copied to a thumb drive.

1. Find the **DemoProjectTemplate1** item underneath **Projects** in the **Project Explorer**. You may have to scroll down in the Project Explorer pane to find it.
2. Right-click the **DemoProjectTemplate1** item. A context menu appears (Figure 2)..
3. Select **Open Containing Folder** from the context menu. A File Explorer window

opens.

4. Find the file called **DemoProjectTemplate1.xml** from the list of files in the File Explorer window. This file represents the template.

Once you've located the template file in the File Explorer Window, you can attach it to an e-mail message using the e-mail client of your choice or you can copy it to a thumb drive.

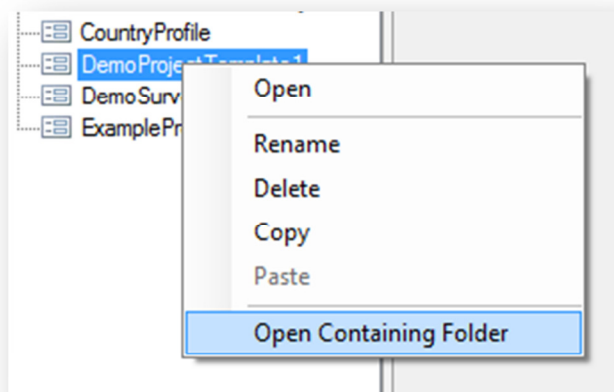


Figure 2

Downloading a project template from a colleague

Now assume you're the investigator that will be using the template. You just received the project template file from your colleague through your health department e-mail account. You can follow the steps below to load the template into Epi Info™ 7 and create a project from it.

1. Download the file attachment from your e-mail client to the desktop.
2. Open the Epi Info™ 7 Form Designer module.
3. Navigate to **File > Get Template...** (Figure 3). A Windows Open File dialog appears.
4. In the Open File dialog, navigate to the desktop.
5. Select the file that was just downloaded from the e-mail client.
6. Click **Open**. The **New Project from Template** window opens.
7. Select the name of the template you just downloaded, if it is not already selected.
8. If necessary, provide a project name in the **Name** text box.
9. Click **OK** to create the project.

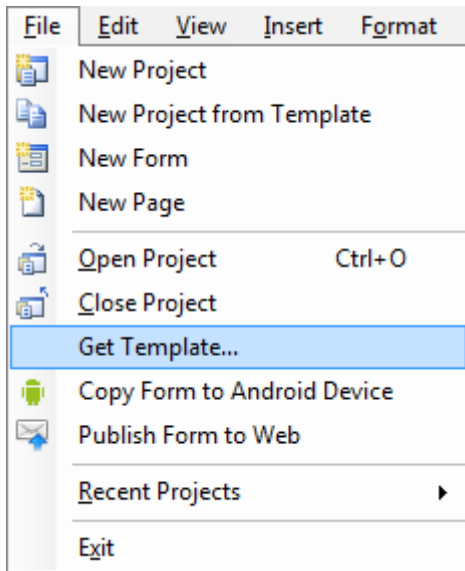


Figure 3

After the above process has been completed, the template will be loaded into Epi Info™ 7 so that it can be used again if necessary. In addition, a new project will have been created in the process based off of the template.

Creating a project from a template

For templates that have already been loaded, you can select the **New Project from Template** option in the File menu. This will start the template creation at step 6 in the previous example.

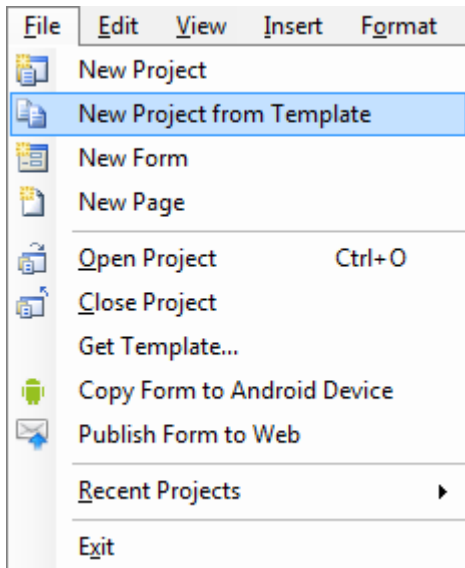


Figure 4