# EE EP Evaluator®

Quality Assurance ... Simplified™



# Release 12.3 - Getting Started

DI Data Innovations®

Revolutionizing the lab. Transforming patient care.

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## Questions?

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# Welcome to EP Evaluator

Thank you for choosing this Data Innovations LLC product. This guide will lead you through the installation process for EP Evaluator.

Your EP Evaluator subscription includes:

1. Use of the software for 1-year.
2. Support for the duration of the subscription.

   **NOTE** Contact information can be found on the **Data Innovations** website.
3. Software updates for the plan to which you subscribe released during the subscription period.
4. Select Webcasts for training. Please register for these trainings.

If you update EP Evaluator to the newest release, please notify Support so that our records are accurate and you receive the correct activation information.

# EP Evaluator Terminology

**Major Release:** A major release increments the release number. For example: from Release 11.0 to Release 12.0. A major release often addresses known issues and adds major enhancements or new functionality.

**Minor Release:** A minor release increments the build number. For example: from Release 12.1 to Release 12.3. A minor release often addresses known issues and adds minor enhancements.

**Version:** The version defines which of the two different types of EP Evaluator available for purchase is being referred to. The functionality of EP Evaluator is different between the **Professional** and **Standard** versions.

**Activation Code:** The activation code is provided by Data Innovations Support via email when you purchase EE. The software is activated for the duration of your subscription.

**Bring data forward:** The process of restructuring EP Evaluator (EE) data gathered in an earlier major release to ensure it is compatible with the current release.

# Software and Hardware Requirements

An IBM-compatible PC with a Pentium CPU or above.

For a 64-bit Microsoft Windows operating system:

- Windows 8.1
- Windows 2012 Server
- Windows 10
- Windows 2016 Server

**NOTE** A PDF viewer is required to view EE reports.

## *Additional Specifications*

- A minimum of 128 MB of RAM.
- Screen resolution: 1024 x 768 or greater.
- A minimum of 200 MB of hard drive space.

**NOTE** The hard disk requirements of EP Evaluator as initially installed are less than 200 MB. If you generate lots of data (hundreds of projects), the total size required can exceed 2 GB.

**NOTE** With EE Professional Version, the amount of disk space required may increase significantly if you use the Audit Trail feature.

## Internet Access

Internet access is not required to operate EE, however, internet access enables you to activate EE online, and check for and download the latest EE builds for your major release.

# Locations EE Writes

EE users must have full read/write/delete access to any folder it writes to. Once installed and activated, EE only writes to three places on the computer:

- The directory tree where EE is installed
- The Application Data folder for the EE user (DGRhoadsTempFiles)
- The HKEY_CURRENT_USER area of the registry

With the Professional Version of EE, an administrator can create data folders in alternate locations, including network locations. In this instance, EE can write to these additional locations.

**NOTE** Every time EE runs, it performs a test to see if it can create and access subfolders and the Registry. If the test fails, EE displays an error message.

### Note for Windows 8.1 and 10 Users

If you decide to install EE in Program Files or Program Files (x86), Windows may write EE data to the virtual store area of the Windows Operating System. Although not generally a problem, this can lead to problems finding the data when using the Zipper program, after upgrading to a new major release of the software, or when browsing to the data using Windows Explorer.

# How to install EP Evaluator on a PC

⚠️ **CAUTION** | **If installing on a network, see the following section on network installation before running the install wizard.**

Access the EE setup file from your EP Evaluator CD-ROM or by downloading the software from the Data Innovations website.

If you already have an activation code use this link to download:

www.datainnovations.com/eedownload

Otherwise select the trial software download link on the following page and submit the request form. You will be sent a temporary activation code.

www.datainnovations.com/ep-evaluator

**NOTE** The person installing EE must have administrator rights and must install EE as administrator. Right click on the .exe file and select Run as Administrator.

**NOTE** If installing on a network, see the section on network installation before running the install wizard.
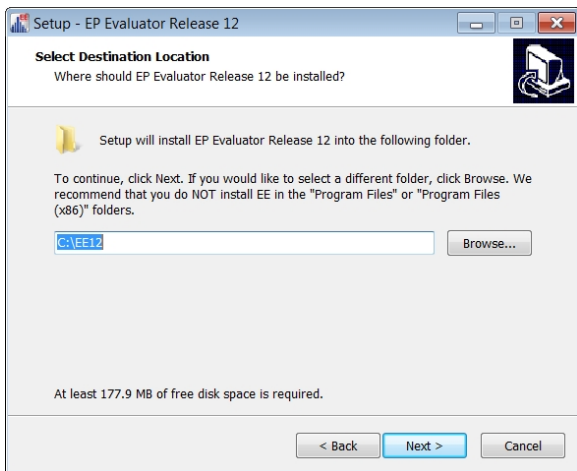
## Install Process

**INSTALLATION NOTE:** For a minor release within major release, always install a later build on top of an earlier

build. For example, install EE 12.3 in the same folder as EE 12.1 or EE 12.3. Never install a major release in the same directory as another major release. For example, never install EE 12 in the same folder as EE 11, EE 10 etc.

1.  Right-click on the set up file with the name similar to Setup EE12-0(35).EXE.

**NOTE** The filename of the EXE will contain different build numbers but will always use this basic format: SetupEEXX-d(dd).exe, where XX is the major release and d is a digit.

2.  Select **Run as administrator** from the right-click menu.

3.  The Setup Wizard launches. Click **Next** to start the installation process.

4.  From the License Agreement window, use the scroll bar to review the terms of the End User License Agreement.

5.  Select **I accept the terms of the license agreement** radio button and click **Next** to confirm your agreement.

6.  From the Select Destination Location window, click **Next** to accept the default installation path of C:\EEXX (recommended).

7. Click **Finish**. EE is now installed on your machine and a desktop icon and link will have been created.

## To start EE and run as Administrator

It is best practice to run EE as an administrator. You can configure compatibility properties on the program to always run as an administrator.

### To configure compatibility properties:

1. Right-click the EP Evaluator icon on your desktop.
2. Select **Properties** from the right-click menu.
3. From the Compatibility menu, open the **Privilege Level** options.
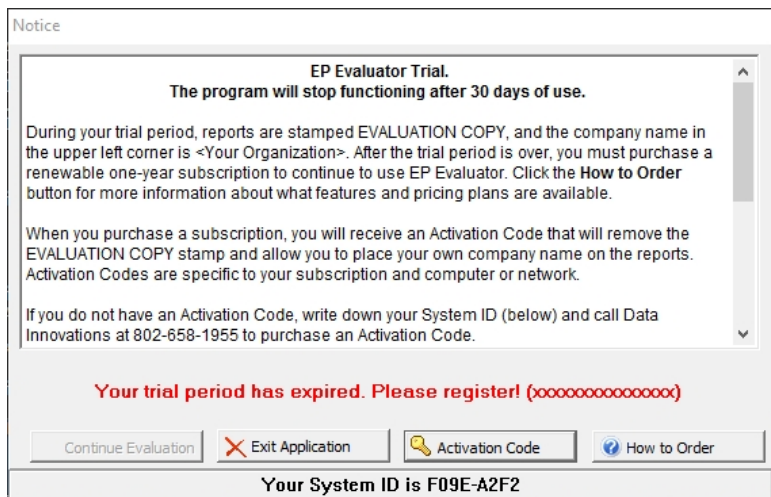4. Check **Run this program as an administrator**.

5. Click **Apply**.
6. Click **OK**.

You have configured the operating system to run EE as an administrator.

**NOTE:** If multiple users access EE from the same computer, update compatibility properties for all applicable user profiles.

## Now Start EE

1. Double click on the desktop item to start EE.
2. If you have an activation code click **Activation Code**. If you want to learn how to obtain an activation code click **How to Order.**



Notice

**EP Evaluator Trial.**
**The program will stop functioning after 30 days of use.**

During your trial period, reports are stamped EVALUATION COPY, and the company name in the upper left corner is <Your Organization>. After the trial period is over, you must purchase a renewable one-year subscription to continue to use EP Evaluator. Click the **How to Order** button for more information about what features and pricing plans are available.

When you purchase a subscription, you will receive an Activation Code that will remove the EVALUATION COPY stamp and allow you to place your own company name on the reports. Activation Codes are specific to your subscription and computer or network.

If you do not have an Activation Code, write down your System ID (below) and call Data Innovations at 802-658-1955 to purchase an Activation Code.

**Your trial period has expired. Please register! (xxxxxxxxxxxxxxx)**

| Continue Evaluation | ✕ Exit Application | 🔍 Activation Code | ❓ How to Order |

**Your System ID is F09E-A2F2**

3. Wnter your organizational details on the activation form.

**NOTE** These details cannot be changed once they have been entered and they will appear on project reports. Please ensure that accurate details are included here.



4. Click **OK** to start EE.

# Network Installation

If you are installing EE across a network, first install a full copy of EE on the main server. When setting up or adding thin clients, there is a special installer included with EE to use from the thin clients that automatically sets up network links that will run EE from the thin client desktop. Once EE is installed on the server, go to the thin client machine, navigate back through the network to the file **SetupThinClient.exe**, on the server, in the folder where the server copy of EE is installed. Run this file **as administrator**, from the thin client, and it will create an EE icon on the desktop of the thin client machine, with a permanent link to the server.

## Activation code for network installation:

When requesting an activation code for a network installation, the eight-digit System ID is different for each thin client. The first four digits identifies the server, and the last four digits uniquely identifies the thin client (workstation). A thin client can access EE on the server as long as the first four digits of the client eight-digit System ID match the first four digits of the 8-digit System ID used to generate the activation code (server). If the first four digits of the server and client system IDs do not match, request an activation code for what's reported on the client machine, and enter the activation code at that client. EE will work from the client, but not the server.

**NOTE:** It is necessary to maintain a stable network path. If the location of the software on the network changes, the software will have to be re-activated for the new location and for each client.

# Installing EE with an IM joint license

If you use Data Innovations Instrument Manager, you can now license EE and IM together. This joint license must already be installed in IM. The IM license will then activate EE automatically when you choose the **Retrieve the activation code from the Instrument Manager license** option, when EE 12.3 is first installed. There is then no need to enter an activation code, but EE will run exactly as if an activation code had been used.



## Network activation with an EE/IM joint license:

If you are using EE on a network and want to activate EE using the licensed copy of IM on the server (and its thin client if it has one), then run **SetupThinClient.exe** on the server from the thin client machine. EE will automatically locate the IM license file that contains the EE activation code. If you want to switch to EE/IM joint licensing on existing EE thin clients that do not yet have an IM thin client installed, in that case you should still run the **SetupTh-**

**inClient.exe** installer once, to copy the Caché libraries that must be present on the client.

# Anti-Virus Software

If your company uses virus protection software, it is important to exclude the EE installation folder (EE11, EE12 etc.), and the **DGRhoadsTempFiles** directory from anti-virus scans. During a scan, anti-virus software may "lock" and/or modify the files being scanned. EE accesses the temporary files directory to store the temporary files necessary for the creation of reports and print previews. The location of the DGRhoadsTempFiles directory is the same for all operating systems:

## Windows 8.1, Windows 2012 Server, Windows 10:

C:\Users\<username>\APPData\Roaming\DGRhoadsTempFiles

**NOTE** The files may be hidden on your system. To show hidden files: Open Folder Options by clicking the Start button. Click Control Panel, Appearance and Personalization, Folder Option, View tab. Under Advanced settings, click Show hidden files and folders, and then click OK

# Activate a trial version

EP Evaluator comes with a free 30-day trial period. Once this trial period passes, you will be prompted to activate the software.

Data Innovations will provide you with an Activation Code when you purchase the software.

Follow the steps below to activate the software:

1. Launch EP Evaluator.
2. Click the Activate button on the Notice screen.
3. Update the **Department, Institution**, and **Location** details.
4. Enter the Activation code in the **Activation Code** text box.
5. Click **OK**.

The software will confirm that you have activated EE.

# Upgrading EP Evaluator

## Minor Release

For a minor release within a major release, always install a later build on top of an earlier build. For example:

- Install EE12.3 in the same folder as EE12.0, EE 12.1, or EE 12.2.

For minor releases, the activation code does not change and all data is automatically restructured to ensure consistency with the more recent build.

## Major Release

If moving to a new major release, never install the new major release in the same folder as an older major release. For example:

- Never install EE12 in the same folder as EE11, EE 11.1, etc.

When moving to another major release of EE, you must contact Data Innovations support to purchase a new Activation Code.

Data will need to be manually brought forward from the older major release into the newer major release.

**NOTE** EE Professional version users should contact support before installing a newer release.

# Bring data forward to a new major release

Bringing data forward manually ensures that data from the older release is structured appropriately for the newer release. There are three options for bringing data and user names forward:

1. The Upgrade Wizard option brings data forward from all active studies in the earlier release.

2. The Backup and Restore option allows you to select which backed-up (archived) projects from the earlier release should be restored in the new release.

3. Migrating project data and/or user names and passwords to a **Professional version** installation, from a Professional Version or from a Standard Version. For this activity see the online help topics at **EP Evaluator Resources** and navigate to Data Management>Exchange Data across Versions. This is also accessed through Professional Version: Security and Passwords>Migrate users to Professional Version.
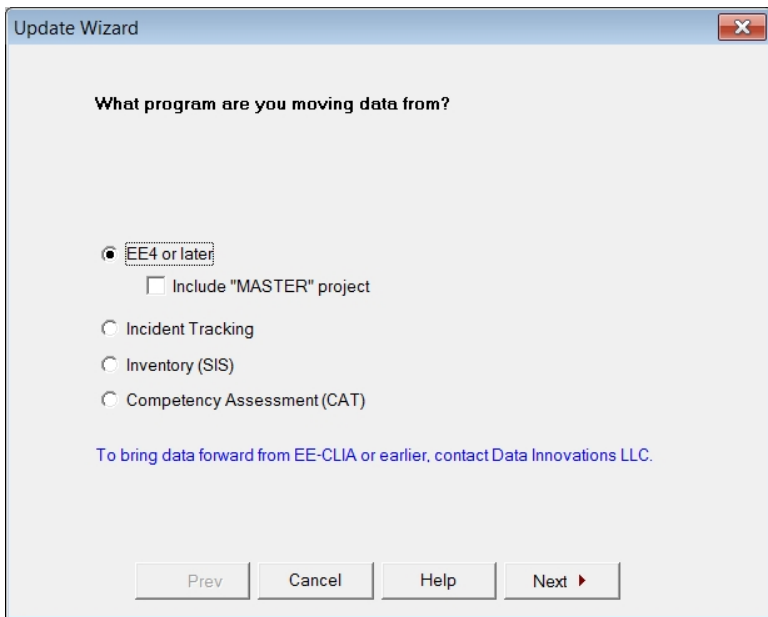
To bring data forward from one computer to another, you will usually use the Backup and Restore option to backup

data on prior releases before restoring them on the current EE install.

**NOTE** Backing up completed projects on a regular basis stream-lines the process of bringing data forward using the Backup and Restore option, because most of the data you wish to bring forward is already archived.

## Upgrade Wizard

1.  Ensure the data from the prior EE release is on the PC where the new release is installed.
2.  Launch the new release of EE.
3.  From the **Statistical Module** window, open the **Utilities** menu.
4.  Click on **Update Wizard**.
5.  From the Update Wizard window, select the EE program you are moving data from.

**NOTE** To bring data forward from any release prior to EE4, using the update wizard, contact Data Innovations support.

6. Browse to the STUDIES folder that contains the data.

**NOTE** The final folder in the directory path must be called STUDIES (not case-sensitive).
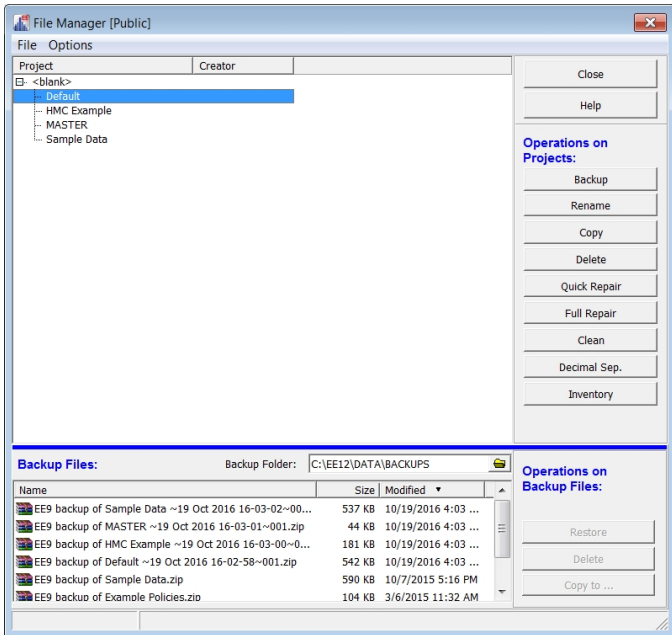
7. Click Finish.

**NOTE** The Update Wizard will move all your data forward into the new EE release. If you are bringing forward a large amount of data, this process can take a significant amount of time.

A dialog confirmation screen indicates the Update Wizard has successfully completed bringing data forward. The Activity Log displays additional information or warnings.

# Backup and Restore

1. Launch the older release of EE.
2. Open the **Utilities** menu.
3. Open **File Manager**.



4. Select the project(s) you wish to back up. To back up a group of projects, select the group prefix in the Project list. All projects in the highlighted group will be backed up. To select several projects at once hold down the shift key before clicking with the mouse

pointer. To choose individual projects hold down the control key before selecting the projects.

5. Click **Backup**.
6. Repeat steps 2 through 5 for all projects you wish to back up.
7. Copy all backed-up projects from the **\DATA\Backups** folder for the older release to the **\DATA\Backups** folder for the new release.
8. Close the older release of EE.
9. Launch the new major release of EE.
10. Open the **Utilities** menu.
11. Open **File Manager**.
12. From the **Backup Files** box, select a backup file to restore.
13. Click **Restore**.
14. Repeat steps 10 through 13 for each project you wish to restore to the new major release

# User Help

Electronic help can be accessed from within EP Evaluator by pressing F1 or from the EE Help menu or by navigating online to EP Evaluator Resources

Additional documentation can be downloaded from our Website:

http://www.datainnovations.com/ep-evaluator-resources

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