

EP Evaluator[®]

QUALITY ASSURANCE...SIMPLIFIED



Release 11

Getting Started



DATA INNOVATIONS[®]
Simple Ideas, Better Solutions



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EP Evaluator Terms

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.

Laboratory Management Module: A portion of EE devoted to helping people manage their laboratories with functions such as inventory control and incident tracking.

Major Release: A major release increments the release number. For example: from Release 10.0 to Release 11.0. 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 11.1 to Release 11.2. A minor release often addresses known issues and adds minor enhancements.

Project: A related collection of experiments for one or more statistical modules.

Statistical Module (SM): A portion of EE that allows the user to enter experimental data in order to perform specific statistical calculations on that data, graph the data, and generate reports.

Unlock Code: If your site does not allow internet access, you may need to request an unlock code to use the software for the duration of your subscription period. You must know your System ID when you call Data Innovations Support to obtain the code.

Version: A version refers to the different types of EP Evaluator available for purchase. The functionality of EP Evaluator is different between the versions. E.g.: CLIA Version, Professional Version, Standard Version, etc.

Web Activation Code (WAC): The web activation code provided by Data Innovations when you purchase EE allows you to activate the software online. Internet access is required. Click the **Unlock or Web Activate** button after launching the software to enter the WAC. The software is unlocked for the duration of your subscription.

Getting Started
EP Evaluator

Software/hardware requirements: EP Evaluator (EE)

A 64-bit IBM-compatible PC with any of the following Windows operating systems:

- Windows 7
- Windows 8.1 (validated for EE 11.2 and above)
- 2008 Server
- 2012 Server

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 be as large as one to two 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:

- web activate
- check for and download the latest EE build for your major release
- send a bug report to Data Innovations support

Anti-Virus Software

If you use virus protection software, it is important to exclude the **DGRhoadsTempFiles** directory. During a scan, anti-virus software may “lock” the files being scanned. EE accesses this directory to store the temporary files necessary for the creation of reports and print previews. Exclude the following directory from virus scanning for all supported Windows Operating Systems:

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

Locations EE Writes

EE users must have full read/write/delete access to any folder EE writes to. Once installed and unlocked, 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 7 and 8.1 Users

We recommend you do not install EP Evaluator in the **Program Files** or **Program Files(x86)** folders. If you decide to install EE in one of these folders, Windows may write EE data to the virtual store area of the Windows Operating System. Although not generally a problem when using EE, this can lead to problems finding the data when using the Zip-per program, after upgrading to a new major release of the software, or when browsing to the data using Windows Explorer.

Install EP Evaluator on a PC

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

<http://ee.datainnovations.com>

NOTE: The person installing EE must have Administrator rights.

NOTE: If installing on a network, see the section on network installation before running the install wizard.

Install Process

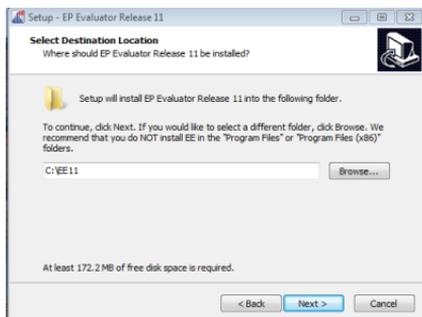
INSTALLATION NOTE: For a minor release within a major release, always install a later build on top of an earlier build. For example, install EE11.2 in the same folder as EE11.0 or EE 11.1. Never install a major release in the same directory as another major release. For example, never install EE11 in the same folder as EE10.0, EE9.0, etc.

1. Right-click on the setup file with the name similar to SetupEE11-0(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 that identifies the minor release and build.

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

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



- Click **Finish**.

Run EE as Administrator

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

To configure compatibility properties:

- Right-click the EP Evaluator icon on your desktop.
- Select **Properties** from the right-click menu.
- From the Compatibility menu, find the **Privilege Level** options.
- Check **Run this program as an administrator**.
- Click **Apply**.
- 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.

Network Installation

If installing EE on a network, you must create a shortcut to the software on each client machine.

NOTE: DI recommends using the UNC path for the shortcut rather than a mapped drive letter. For example,

use:

\\server\EE11.exe

Do not use:

Y:\EE11.exe

Unlock code for network installation:

When requesting an unlock code for a network installation, the eight-digit System ID is different for each client. The first four digits identify the server and the last four digits uniquely identify the client (workstation).

For a network license, a client can access EE on a 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 unlock code (server). If the first four digits of the server and client system IDs do not match, request an unlock code for what's reported on the client machine, and enter the unlock code at that client. EE will work from the client, but not the server.

NOTE: For a network installation, it is necessary to unlock/web activate EE as administrator from each client (workstation).

Activate EP Evaluator

EP Evaluator comes with a free 14-day trial period. Once this trial period passes, you will be prompted to activate the software.

There are two ways to activate your software:

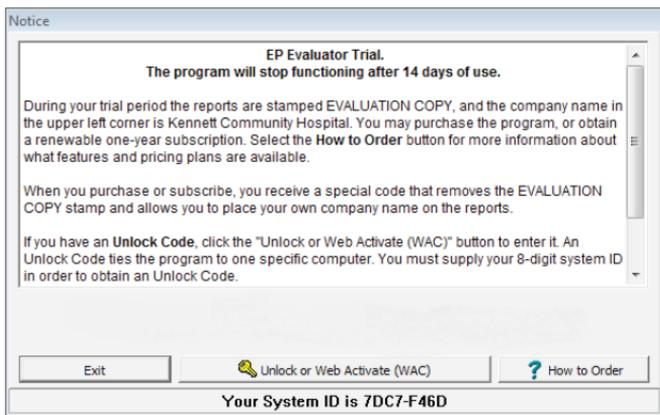
- Web Activate
- Unlock Code

NOTE: Web Activation requires Internet Access.

Web Activate

If you can activate EE via the Web, Data Innovations will provide you with a Web Activation Code (WAC) when you purchase the software. Follow the steps below to activate the software via the Web.

1. Launch EP Evaluator.
2. Click the **Unlock or Web Activate (WAC)** button on the Notice screen.



3. Update the **Department, Institution, and Location** details.

4. Enter the Web Activation code in the **Unlock Code** text box.

Enter Unlock Code

Department: Clinical Laboratory

Institution: Kennett Community Hospital

Location: Kennett Square, PA 19348

Unlock Code: XXXX-XXXX - XXXXXXXXXXXXXXXX

OK Cancel ? Help

5. Click **OK**.

The software will confirm that you have activated EE.

Unlock Code

If you are activating via an Unlock Code, follow the steps below.

1. Launch EE.
2. Record the system ID listed at the bottom of the **Notice** window.
3. Call Data Innovations Support with the 8-digit system ID and your support number.

NOTE: If you don't have your support number, Data Innovations will need to know your institution.

4. After Data Innovations sends you the unlock code, launch EE.
5. Click the **Unlock or Web Activate (WAC)** button on the **Notice** screen.
6. Update the **Department, Institution, and Location** details.
7. Enter the Unlock Code.
8. Click **OK**.

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 EE11.2 in the same folder as EE11.0 or EE 11.1.

For minor releases, the unlock 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 EE11 in the same folder as EE10, EE 10.1, etc.

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

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

NOTE: If you use EE Professional version and have implemented EE's security controls, please contact support before installing a new EE release.

Bring data forward to a new major release

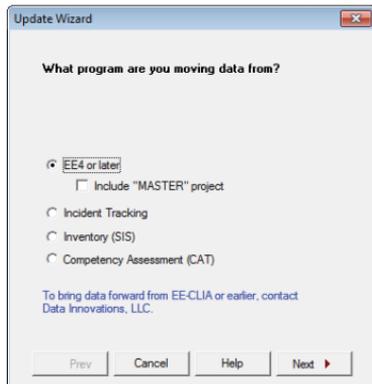
Bringing data forward manually ensures that data from the older release is structured appropriately for the newer release. There are two options for bringing data forward:

- The **Upgrade Wizard** allows you to select those projects you wish to bring forward from all active studies in the earlier release.
- **Backup and Restore** allows you to restore projects from an earlier release or to restore projects created on a different computer.

NOTE: Backing up completed projects on a regular basis streamlines 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. In the EE **Utilities** menu, click Update Wizard. The first page of the Update Wizard is displayed:



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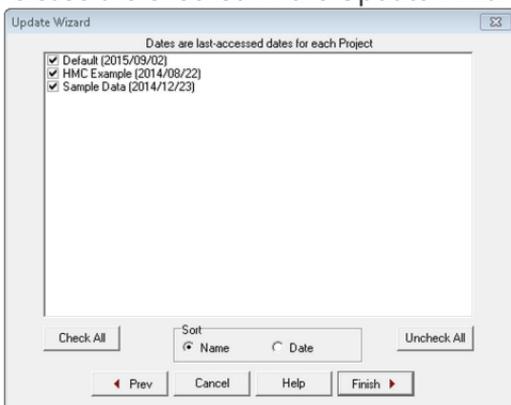
- From the **Update Wizard** window, select the EE program you are moving data from.

NOTE: Contact Data Innovations support if using the Update Wizard to bring data forward from any release prior to EE4.

- Click **Next**.
- Browse to the STUDIES folder that contains the data.

NOTE: The final folder in the directory path must be called STUDIES (not case-sensitive).

- Click **Next**.
- Ensure the Project(s) you want EE to bring forward to the new release are checked in the Update Wizard Project list.



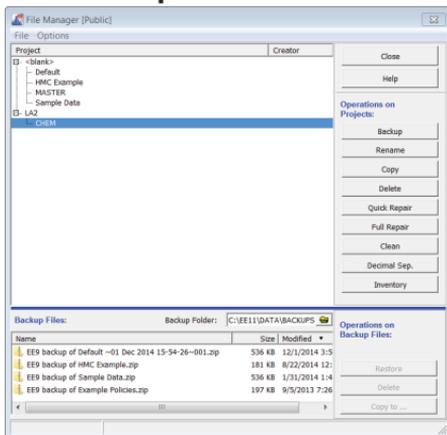
- Click **Finish**.

NOTE: The Update Wizard will move selected 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.
5. Click **Backup**.



6. Repeat steps 4 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 12 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.

Additional documentation can be downloaded from our Website:
<http://ee.datainnovations.com>

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