



Installation and Activation Guide

Release 12.3

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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 from the time of purchase.
2. Technical Support for the duration of the subscription.

NOTE Contact information can be found on the [Data Innovations](#) website.

NOTE Technical Support is defined as diagnosis and assistance of Software issues which result from a failure of the properly installed Software to perform in line with the specifications set forth in the applicable Documentation for the Software (a "Software Error"). Support does not include training of Customer's personnel, consulting, or other available services. For additional services, Data Innovations will work with Customer to understand requirements and outline an offering to meet their specific needs. Services beyond those provided under Support are billable and will be contracted for separately. Please reference the Terms and Conditions set forth in the [Maintenance and Support Agreement](#).

3. Software updates for the plan to which you subscribe released during the subscription period.
4. Select Webcasts and an on-line video library for training.

Activation Code

You will receive an Activation Code by email that contains important information for navigating this *Installation and Activation Guide*. An Activation Code will contain a series of numbers and letters that tells you important information about your copy of EP Evaluator (EE). An Activation Code will be similar to the following:

WCNS03-123456-Date-SUB-000000

WC – Indicates for which version EE the Activation Code was generated. Example: WC denotes EE 12, WB is EE11.

N - Represents the installation type purchased. "B" denotes a "Standalone" installation. "N" denotes a "Network" installation. Follow the directions in this guide for the installation and activation type you purchased.

S - Represents the Rights Code purchased. "S" indicates a Standard purchase of EE. "P" indicates a Professional Rights Code.

03 - Indicates how many EE user sessions can run concurrently.

NOTE EE can be activated from the Instrument Manager license files. If you did not receive an Activation Code, have Instrument Manager license files, and need to confirm the purchased activation method, then open the license cache file in Notepad. If EE is available, "EP Evaluator v12 Max Users = __", will have a nonzero number next to it. If a nonzero number is present in the Instrument Manager license cache file, follow the steps under "IM and EE Joint License Install Process" for installation and activation.

EP Evaluator Terminology

EE	EP Evaluator
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 are available. 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 or renew EE. The software is activated for the duration of your subscription.
Thin Client	A shortcut or link that connects from an individual workstation to the network installation of the program.

Validated Operating Systems

An IBM-compatible PC with 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.
- 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. Generation of projects and experiments within EP Evaluator software will increase the storage size over time.

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

NOTE For users of Instrument Manager and EP Evaluator upgrading to Instrument Manager 2023(v9.00.00), note that you will still see references to Cache within the existing EP Evaluator product. These still refer to the Instrument Manager database which has been upgraded to IRIS with the release of Instrument Manager 2023.

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.

NOTE HTTPS port 443 needs to be open at minimum.

NOTE If you receive internet unavailable warnings while activating you can convert your Activation Code to an Unlock code by going to this website: http://www.archiveddi.com/iframes/DI_webact.htm

Anti-Virus Software

If your company uses virus protection software or disk cleanup software, it is important to exclude the EE installation folder (EE12), and the **DGRhoadsTempFiles** directory from antivirus scans. During a scan, antivirus 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, and Windows 2016 Server.

C:\Users\\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**, select the **View** tab. Under the **Advanced settings** box, select **Show hidden files, folders and drives**, and then click **OK**.

NOTE For Network installations, C:\Program Files (X86)\EETHinClient should be excluded from Thin Client computers.

Operational Permissions

EE users must have at minimum full read/write/modify access to any folder to which the program writes. 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

The HKEY_LOCAL_MACHINE section of the registry is only used during activation/version check. EE will need write access to that section during installations, otherwise we only need read access. We do however require read/write/modify access to HKEY_CURRENT_USER for normal EE operations.

EE11 on 64 bit OS:

- HKEY_LOCAL_MACHINE\SOFTWARE\Classes\Wow6432Node\CLSID\{CF4637DF-3D23-4F36-A024-BFE8D40879C0}

EE11 on 32 bit OS:

- HKEY_LOCAL_MACHINE\SOFTWARE\Classes\CLSID\{CF4637DF-3D23-4F36-A024-BFE8D40879C0}

EE12 on 64 bit OS:

- HKEY_LOCAL_MACHINE\SOFTWARE\Classes\Wow6432Node\CLSID\{8C9F85D6-524B-43CE-80EE-9A8F2FED0326}

EE12 on 32 bit OS:

- HKEY_LOCAL_MACHINE\SOFTWARE\Classes\CLSID\{8C9F85D6-524B-43CE-80EE-9A8F2FED0326}

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. Occasionally, 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

IMPORTANT NOTE: If installing on a network, see the following section on Network Installation before running the install wizard.

Downloading the Software

Access the EE setup file 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.

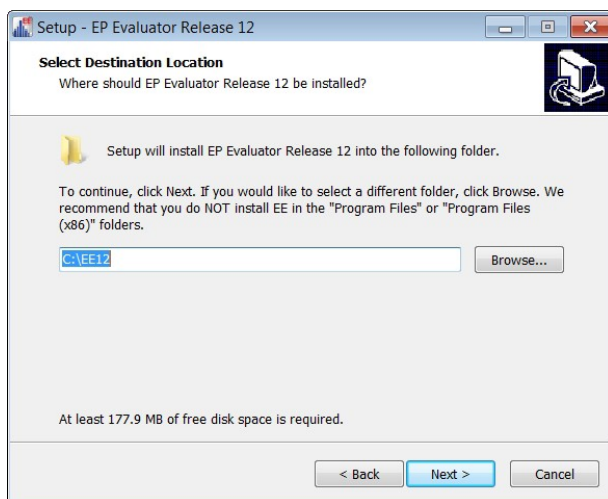
INSTALLATION NOTE: For a minor release within major release, always install a later build on top of an earlier build. For example, install EE 12.3 in the same folder as EE 12.1 or EE 12.3. Never install a major release in the same directory as another major release. For example, never install EE 12 in the same folder as EE 11, EE 10 etc.

Non-Networked or Standalone Install Process

1. Right-click on the setup file such as **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.

2. Select **Run as administrator** from the right-click menu.
3. The Setup Wizard launches. Select **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** button and select **Next** to confirm your agreement.
6. From the Select Destination Location window, select **Next** to accept the default installation path of C:\EEXX (recommended).



7. Select **Finish**. EE is now installed on your machine and a desktop shortcut will have been created.

Administrator Configuration

NOTE It is best practice to run EE as an administrator. You can configure **compatibility properties** to 'run as an administrator' each time the program is launched. The following steps may vary slightly depending on the Windows version you are using.

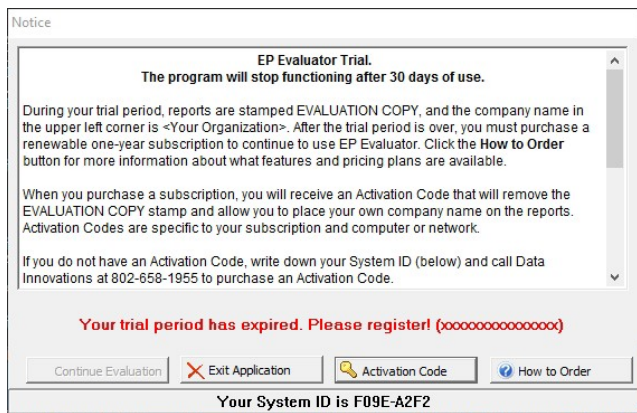
To configure compatibility properties:

1. Right click the EP Evaluator icon on your desktop.
2. Select **Properties**.
3. Select the **Compatibility** tab.
4. Select the box **Run this program as an administrator**.
5. Select **Apply**.
6. Select **OK**.

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

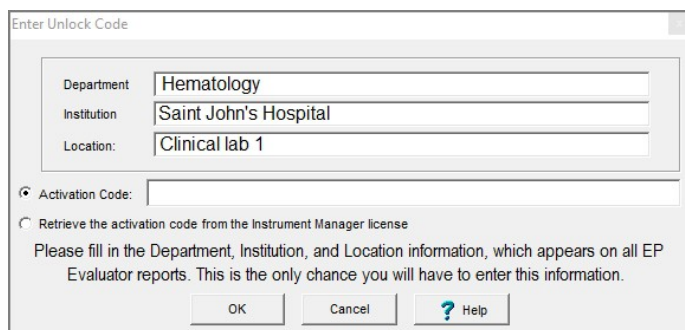
Activation for a Standalone/Non-Network Installation

1. Right click on the desktop item to start EE.
2. Select **Run as administrator** from the right-click menu.
3. If you have an Activation Code select **Activation Code**.
4. If you do not have an **Activation Code** select **How to Order** to obtain an Activation Code.



5. Enter your organizational details on the activation form.

IMPORTANT NOTE: This information is not easily changed once entered and will appear on all project reports. Please ensure this information is accurate before proceeding to the next step.



6. Enter the Activation Code.

7. Select **OK** to start EE.

Network Install Process

STOP! Before you start:

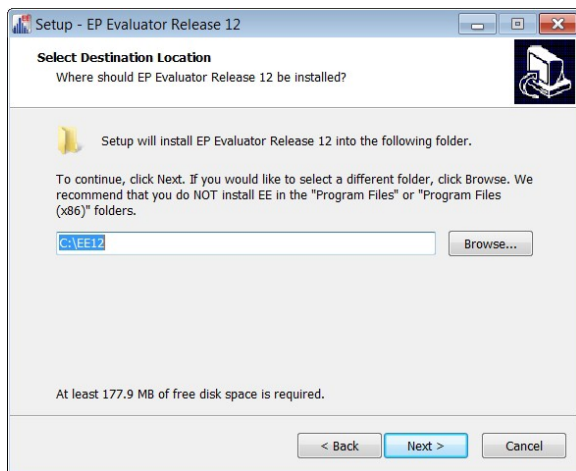
- To automatically create shortcuts, you must install and run EE from a network share (example: "\\server\xxx\yyy") and not from a mapped drive (example: "T:\xxx\yyy"). If EE is installed on a mapped drive, the installer will not be able to continue setup.
- If you are utilizing a Network license for EP Evaluator, first have your IT Specialist follow the instructions below to install a full copy of EE on a network share or the Server. All users of EE need to have full rights to the EE folder inherited down to the file level.

Server Install

1. Right-click on the setup file such as **Setup EE12-0(35).EXE**.

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

2. Select **Run as administrator** from the right-click menu.
3. The Setup Wizard launches. Select **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** button and select **Next** to confirm your agreement.
6. From the Select Destination Location window, select **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.

Administrator Configuration

NOTE EE must be run as an administrator. You can configure **compatibility properties** to 'run as an administrator' each time the program is launched. The following steps may vary slightly depending on the Windows version you are using. To configure compatibility properties:

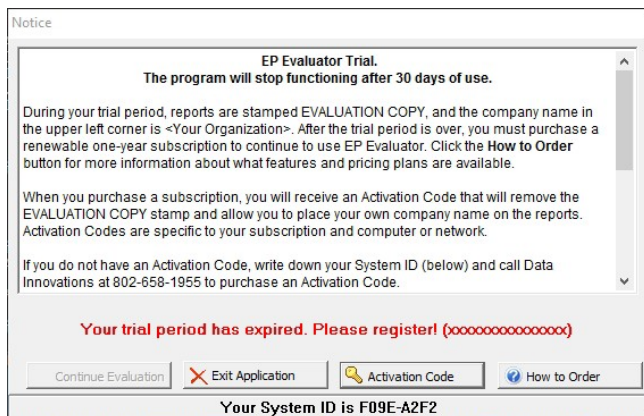
1. Right click the EP Evaluator icon on your desktop.
2. Select **Properties**.
3. Select the **Compatibility** tab.
4. Select the box **Run this program as an administrator**.
5. Select **OK**.

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

Activation Network Server Installation

1. To Activate a Network Installation right click.
2. Select **Run as administrator** from the right-click menu.

3. If you have an Activation Code, select **Activation Code**.
4. If you do not have an Activation Code, select **How to Order** to obtain an Activation Code.



5. Enter your organizational details on the activation form.

IMPORTANT NOTE: This information is not easily changed once entered and will appear on all project reports. Please ensure this information is accurate before proceeding to the next step.

The screenshot shows the 'Enter Unlock Code' dialog box. It contains three text input fields: 'Department' (filled with 'Hematology'), 'Institution' (filled with 'Saint John's Hospital'), and 'Location' (filled with 'Clinical lab 1'). Below these fields is a radio button for 'Activation Code:' which is selected. There is also an unchecked radio button for 'Retrieve the activation code from the Instrument Manager license'. A note below the radio buttons says: 'Please fill in the Department, Institution, and Location information, which appears on all EP Evaluator reports. This is the only chance you will have to enter this information.' At the bottom are 'OK', 'Cancel', and 'Help' buttons.

6. Enter the Activation Code.
7. Select **OK** to start EE.

NOTE Refer to the Data Migration Section below if you are upgrading an existing installation of EE and wish to continue access with previous experiments.

8. Once EE is installed on the server, share the installation folder with the rest of your network.
9. Navigate to the C:/EE drive or whatever folder you choose to extract the program to and Right click on the EE12 folder.
10. Select **Properties**.
11. Select the **Sharing** Tab.
12. Select **Share**.
13. Select the person or workstations you want to share the EE program with, within your network or select 'Everyone'.
14. Select the permission level by giving the select PCs **read/write** permission.

15. Select **Add**.
16. Select **Share**.

NOTE Click **Ok** 'Allow Changes by Windows'. A message may appear and may vary slightly with different versions of Windows.

Thin Client Installation

1. Open File Explorer.
2. Type in the Network path.
3. Navigate to the EE installation folder found in your network directory. Right click and select **Run as an administrator** the **SetupThinClient.exe** executable file to launch the EE Thin Client Wizard.
4. Select **Next**.
5. From the License Agreement window, use the scroll bar to review the terms of the End User License Agreement.
6. Select **I accept the terms of the license agreement** radio button and select **Next** to confirm your agreement.
7. From the Select Destination Location window, select **Next** to accept the default installation path of C:\EEXX (recommended).
8. Select **Finish**. EE thin client or shortcut is now installed on your machine and a desktop icon and link will have been created.

Administrator Configuration

Note EE must be run as an administrator. To configure **compatibility properties** to run as an administrator each time the program is launched, follow the steps below. (Steps may vary slightly depending on the Windows version you are using.)

To configure compatibility properties:

1. Right click the EP Evaluator icon on your desktop.
2. Select **Properties**.
3. Select the **Compatibility** tab.
4. Select the box **Run this program as an administrator**.
5. Select **OK**.

NOTE If multiple users access EE from the same computer, update compatibility properties for all applicable user login profiles. You may install a thin client or shortcut on multiple workstations within your laboratory network if it has been shared from the server. You are allowed as many concurrent users as your license allows. The number of users can be determined from your License type displayed on the opening screen of EP Evaluator. (See the Activation Code section for an explanation of code).

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 reactivated for the new location and for each client.

IM and EE Joint License Install Process

NOTE Follow the steps for a network installation for a joint license install. EE must be installed on the same server as Instrument Manager (IM).

Activation

If you use Data Innovations Instrument Manager, you can now license EE and IM together. The IM license contains the EP Evaluator license information and will activate EE automatically when EE is first installed. You will be given the option to choose **Retrieve the Activation Code from the Instrument Manager license**. There is no longer a need to enter an Activation Code for EE, but it will run exactly as if an Activation Code had been entered.

Enter Unlock Code

Department: Hematology

Institution: Saint John's Hospital

Location: Clinical lab 1

Activation Code:

Retrieve the activation code from the Instrument Manager license

Please fill in the Department, Institution, and Location information, which appears on all EP Evaluator reports. This is the only chance you will have to enter this information.

OK Cancel ? Help

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 then run **SetupThinClient.exe** located on the server from the thin client. EE will automatically locate the IM license file that contains the EE Activation Code.

If you want to switch to an EE/IM joint licensing on an existing EE thin client(s) run the **SetupThinClient.exe** installer once to copy the IM libraries that must be present on the client.

NOTE For the EE/IM joint license feature to be utilized after installing or upgrading to **Instrument Manager 2023(v9.00.00)**, users must install the Instrument Manager Thin Client on the same workstations as the EE Thin Client. Creation of an Instrument Manager Thin Client shortcut is not required, only running the Instrument Manager setup.exe for a Thin Client install on a system that has EE Thin Client installed.

Data Migration

Migrating previous experiment data ensures that data from the older versions is structured appropriately and is only necessary for a new major release. Follow the steps below to migrate your data to the new major release of EE. If you are upgrading a minor release, there is no need to migrate your data. EE will check the compatibility or restructure your data files automatically.

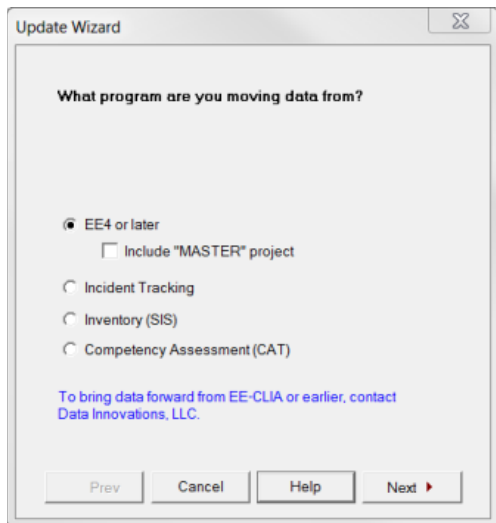
Update Wizard:

NOTE If this is a network installation, the data is most likely stored on the server or network share. For Network installations of EP Evaluator, you can migrate data using the below steps from either the Thin Client or from the EP Evaluator shortcut on the local install location. Ensure that from the chosen location, EP Evaluator can access the STUDIES folder.

STOP:

If this is an upgrade for a Professional EP Evaluator license, proceed to Professional section before attempting data migration.

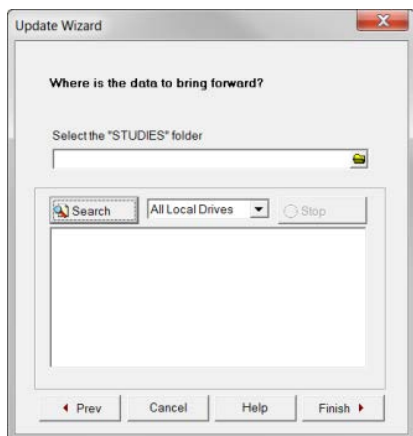
1. In the EE **Utilities** menu, select **Update Wizard**. The first page of the **Update Wizard** is displayed:




2. Select the program from which to migrate experiment data.
3. If you are using policies under RRE then select **Include “Master” project**.

NOTE Not all users have or choose to use the Incident Tracking, SIS or CAT modules. If you are using these modules they should be migrated in separate steps.

4. Select Next. The next page of the Update Wizard is displayed:

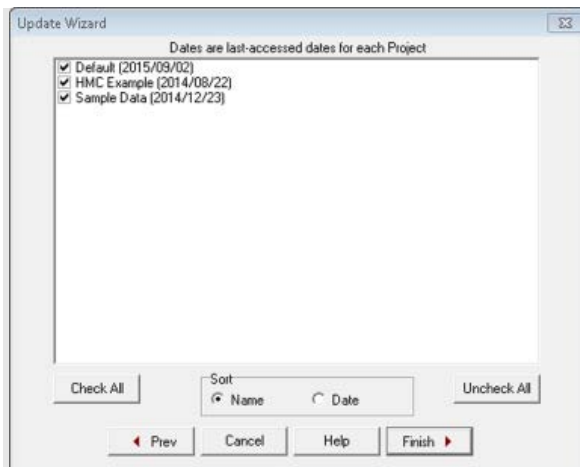


5. Select the experiment data **STUDIES folder**:

- a) To browse manually for the folder, select  in the update wizard window, then navigate to the old parent folder of EE that you are migrating data from then to the folder \DATA\STUDIES.
- b) To perform an automated search for the folder across drives, select the search location from the drives drop-down, select **Search**. Double-click the folder in the search results area of the **Update Wizard**.

TIPS:

- To stop an automated search at any time, select Stop.
 - You can search a specific drive, All Local Drives, or Local and Network Drives.
 - The program will search only network drives that are mapped to a drive letter.
6. Select **Next**.
 7. Ensure the Project(s) you want EE to migrate to the new release are selected in the Project list.
 - Use the **Sort** option to sort projects by name or by the date last accessed.



8. Select **Finish**.

NOTE If you see messages regarding “duplicate entries” this may be due to three default projects:

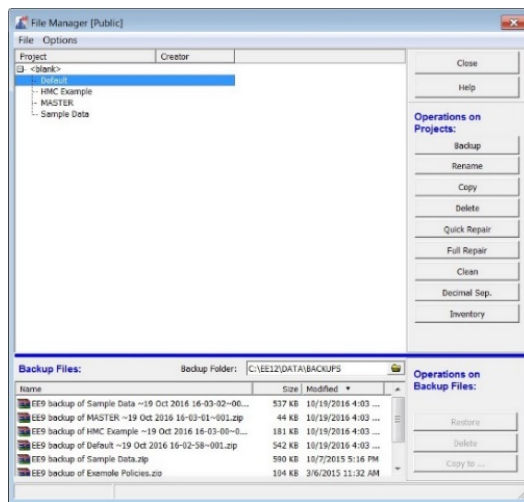
- Default Project
- Sample Data Project
- HMC Example Project

The “duplicate entries” warnings are an indication that data did not migrate for those above projects. If you have stored data in any of the above default projects, you will need to do a backup restore to retain this data.

Backup and Restore

NOTE You may decide to transfer zipped Projects to other EE users, or you may want to retain projects from older EE versions. Backup and Restore is another data migration method.

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

Professional Version

NOTE If you are upgrading from EE12.0 Professional Version to EE 12.3 Professional Version there is no need to follow the steps below. Data groups and user profiles will be retained.

If upgrading from EE 12.0 Standard Version to EE 12.3 Professional Version, you may want to distribute your old Studies into new groups once you have set these up in EE 12.3 Professional Version. In this case simply move the Backup and

Studies folders in the EE 12.0 DATA folder into the Backup and Studies folders in your new group folders, using File Manager.

There are two possible scenarios that require additional steps:

Scenario 1:

Migrating data from a Standard to a Professional version of EE

If your previous EP Evaluator program was a standard version and your new installation is a Professional version, then you will need to migrate Projects that were previously in the common Studies folder in EEXX (*xx is the version of EE you want to migrate from*) and place them in a new DATA-CHEM group Studies folder.

1. Install EE12.3. Do **not** run or activate it yet.
2. Examine the list of projects in the old STUDIES folder for the EE version you are migrating from and create a STUDIES folder for the projects you wish to migrate to then move the projects to the appropriate STUDIES folder.
3. Determine who the project owner is, and which group that owner belongs to.

The **C:\EE12\DATA** folder contains two folders, BACKUPS and STUDIES. If you want to utilize user group functionality in EP Evaluator, add new folders in this file location. Distribute your separated studies and backup zip files into the STUDIES and BACKUPS folders in the group directories.

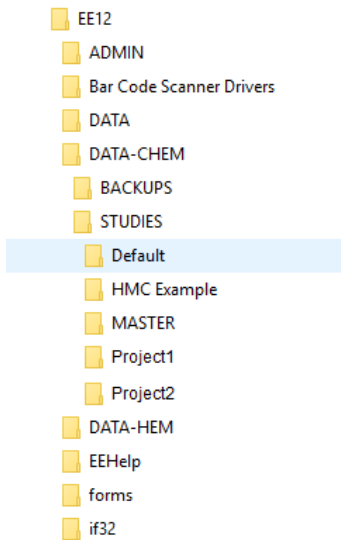
Example:

C:\EE12\DATA-CHEM folder for the CHEM group

C:\EE12\DATA-HEM folder for the HEM group

Use Windows Explorer to copy each project from the source studies folder and redistribute it to the appropriate destination folder. When done, your EE12 folder should look similar to the illustration below. In the illustration, Project1 and Project2 (example project names) are projects copied from the STUDIES folder of the old EE version into the STUDIES group folder under DATA-CHEM in EE.

1. Start EE 12.3 and activate if necessary. The data will re-structure.
2. In EE File>Security>Administer Users, select to add the new group studies folders. EE will inform you that the group folders already exist and ask you if you want to use them. Select yes to accept these into the EE system.
3. Add any new user profiles and allocate them to the appropriate groups.
4. If you are upgrading from a previous major version, EE12 will restructure all project files in the system, and the old files will be incorporated into the new setup. This makes the old data you copied compatible with EE12.3 Professional Version.



This completes the migration of projects from a non-professional version of EE to EE12.3 Professional version.

Scenario 2:

Migration from EE7 through EE11 Professional Version to EE 12.X Professional

The following example demonstrates how to migrate projects in groups, with users and passwords, from EE11 Professional Version to EE12.3 Professional Version. If you are migrating data from another version, simply substitute that version for "EE11".

1. Install EE12.3 Do **not** start the software or activate it yet (if you have launched the software; to proceed you will have to uninstall and reinstall the application).
2. Use Windows Explorer to delete the C:\EE12\DATA folder. Then copy the DATA folder and all DATA-groupname folders from C:\EE11 to C:\EE12. The EE12 folders should have a structure similar to that illustrated in the image in Scenario 1.
3. Run the utility program:
C:\EE12\OtherTools\ProMigrate.exe to copy User IDs and encrypted passwords from EE11 to EE12.
4. If EE11 has any non-standard group data folders located outside the EE data structure, make a backup of those folders. They will be updated in place to EE12 and will then be unreadable by EE11.
5. Start EE12. You will be asked to enter your User ID/Password from EE11. The presence of the EE12INSTL.MRK file will trigger a restructuring of all project files in the system. This makes the old data you copied compatible with EE12 Professional version. The .MRK file is then deleted automatically.

If you already started EE12 and want to import the file retrospectively, you will need to close EE, then use Notepad to recreate the file called EE12INSTL.MRK in the EE12 directory, then follow the procedure above again. The contents of the .MRK file don't matter but it is what triggers EE12 to restructure data from older version.

User Help

Electronic help can be accessed from within EP Evaluator by pressing F1 or from the EE Help menu. Additional documentation and a video library for users can be found on our Website:

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

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