

Preparatory steps before you begin

If the course comes on a CD-ROM / DVD-ROM

If your course is on a CD-ROM, it might be easiest to copy its entire content, i.e., the folder containing the course, to your computer hard disk. One level below the folder, you will see a file:

index.html

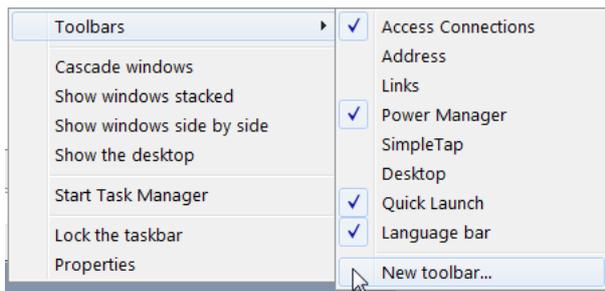
This is the name commonly given by convention to the opening page (the “home page”) of a web site. Indeed, the course material is organized like a web site. If you double-click on this file (INDEX.HTML), the web opens in your default browser. For fastest access to the web you might wish to make a short-cut to this opening page on your desktop and then drag it down to the Quick Launch taskbar (Windows XP® and Windows Vista®). To create a desktop shortcut, right-click on this file, go to Send To and Desktop (create shortcut) and click the latter. You can drag this desktop shortcut down to the Quick Launch taskbar. This will always give you visible access with a single click. Windows 7® has hidden the Quick Launch taskbar and has replaced it with an option to pin programs to the Taskbar. It is possible to restore the old Quick Launch taskbar if you wish (see next paragraph).

Restoring the Quick Launch bar in Windows 7®

Click anywhere on an empty part of the taskbar, right-click and ensure that “Lock the taskbar” is unticked:

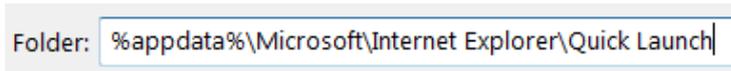


then right-click again and choose “Toolbars” | “New toolbar”:



and type into the location bar:

%appdata%\Microsoft\Internet Explorer\Quick Launch



and press Enter. Ensure that the path is displayed at the top, and click Select Folder. The Quick Launch bar will appear in the Taskbar. Drag the dots to pull it out, then right-click it and untick “Show text” and “Show title”. You can now drag short-cuts from the Desktop into the Quick Launch bar (and then delete them from the Desktop).

Creating working directories

We will require three folders, all in the root of the drive to which you have administrative access, commonly this will be the C:\ drive:

```
\epidata  
\epidata_course  
\temp
```

The three components of EpiData software, i.e. EpiData Manager, EpiData EntryClient, and EpiData Analysis, will be installed in the \epidata folder.

In the \epidata_course folder we will keep all our data files that we use and create during this course.

You may already have a \temp folder as it is common, very useful and good practice to have a temporary “storage” folder, i.e. a folder where we temporarily store files that we may download from the Internet or indeed in this case from our disk-based course web before we move them to the final destination on our PC. The content of the \temp folder should be such as not ever to inflict harm or loss if its entire content is erased (else it wouldn’t really be “temporary”).

Download EpiData Manager, EpiData EntryClient, and EpiData Analysis

EpiData Manager and EpiData EntryClient are very small executable files. Although the version we use is Windows®-based, the setup does not interfere with your Windows® set-up: all files are placed in a single directory (“folder” in current Windows® terminology) without leaving any trace of it anywhere else on your system (no *.dll files).

While EpiData Manager and EpiData EntryClient are available for all three operating systems, EpiData Analysis is, for the time being, a Windows® software program only, but with emulators the latter can be run under Linux and Mac operating systems.

The numbers in the file names indicate version. As development continues these change, but names of Manager and Entryclient will not change.

There are different ways to install / set up the software, and we propose the most simple one which does not even require any installation procedure: there is thus no requirement for administrator’s right, but instead you need to manipulate Windows® a little bit to get the programs accessible through your Windows® Start menu.

If you open the EpiData web site at <http://www.epiddata.dk> and click the link to the download page, you see:

New versions released !!

The new xml file format based system has been released, see [the specific mail](#) with information and get the software from [the download page](#)

You will note a whole list of options, Installation packages and further down Zipped executables (see next page).

For the setup here, we are choosing the Zipped Executable for the Windows® operating system. You need to know the architecture of your machine, whether it is 32-bit or 64-bit.

| Installation packages | | |
|-----------------------|--|---|
| OS: | Manager v2.0.2.28 | EntryClient v2.0.2.13 |
| Linux: | Standard 32 bit 10.Mar 2015 (4.8 Mb) [224] | Standard 32 bit 06.Mar 2015 (1.8 Mb) [216] |
| | Linux 64 bit 10.Mar 2015 (5.1 Mb) [210] | Linux 64 bit 06.Mar 2015 (2 Mb) [217] |
| Mac OS X: | Standard Intel 10.Mar 2015 (8.9 Mb) [560] | Standard Intel 06.Mar 2015 (4.6 Mb) [478] |
| | Power PC 10.Mar 2015 (8.9 Mb) [259] | Power PC 06.Mar 2015 (4.6 Mb) [247] |
| Windows: | Standard 32 bit 10.Mar 2015 (4.2 Mb) [1245] | Standard 32 bit 06.Mar 2015 (1.6 Mb) [954] |
| | Windows 64 bit 10.Mar 2015 (4.3 Mb) [1477] | Windows 64 bit 06.Mar 2015 (1.7 Mb) [1090] |

Zipped executables

| Zipped executables | | |
|--------------------|---|---|
| OS: | Manager v2.0.2.28 | EntryClient v2.0.2.13 |
| Linux: | Standard 32 bit 10.Mar 2015 (4.8 Mb) [172] | Standard 32 bit 06.Mar 2015 (1.8 Mb) [185] |
| | Linux 64 bit 10.Mar 2015 (5.2 Mb) [163] | Linux 64 bit 06.Mar 2015 (2 Mb) [188] |
| Mac OS X: | Standard Intel 10.Mar 2015 (4.8 Mb) [250] | Standard Intel 06.Mar 2015 (1.8 Mb) [241] |
| | Power PC 10.Mar 2015 (4.8 Mb) [184] | Power PC 06.Mar 2015 (1.8 Mb) [216] |
| Windows: | Standard 32 bit 10.Mar 2015 (4.6 Mb) [531] | Standard 32 bit 06.Mar 2015 (1.6 Mb) [405] |
| | Windows 64 bit 10.Mar 2015 (4.7 Mb) [538] | Windows 64 bit 06.Mar 2015 (1.7 Mb) [455] |

If you do not know your machine's architecture, then type:

msinfo32

into the Windows® Search bar:



[Enter], and you get the information:

| Item | Value |
|----------------------|------------------------------------|
| OS Name | Microsoft Windows 7 Professional |
| Version | 6.1.7601 Service Pack 1 Build 7601 |
| Other OS Description | Not Available |
| OS Manufacturer | Microsoft Corporation |
| System Name | WS20110930-1 |
| System Manufacturer | LENOVO |
| System Model | 4174P4G |
| System Type | x64-based PC |

Alternatively, you can right-click on My Computer and click on Properties. You will be able to find the system type and operating system (here shown for a Windows 7® PC with a 64-bit architecture):

Processor: Intel(R) Core(TM) i7-3687U CPU @ 2.10GHz 2.60 GHz
 Installed memory (RAM): 12.0 GB (11.7 GB usable)
 System type: 64-bit Operating System
 Pen and Touch: No Pen or Touch Input is available for this Display

From among the Zipped executables, save the pair that is appropriate for your computer to your C:\TEMP folder. As a result you should get two of the following four zipped files:

[epidataentryclient.2.0.2.13.win.32.zip](#)
[epidatamanager.2.0.2.28.win.32.zip](#)

[epidataentryclient.2.0.2.13.win.64.zip](#)
[epidatamanager.2.0.2.28.win.64.zip](#)

The numbers in the file names indicate version. As development continues these change, but names of Manager and Entryclient will not change. As we are in the process of downloading from the EpiData web site, please move further down to EpiData Analysis:

EpiData Analysis

Download either one complete setup file as exe, zip or ALL the smaller parts. Setup file includes program, introduction and core documentation.
 First (V1.0) released Sept. 2005. V2.2 may 2013 (with epx support) A build is a minor revision, see [list of changes](#)

| | | | | |
|--|--|--|---|--|
| English V2.2 Rel. 2 (Build 183) | list of changes Command reference | 7 page Intro 22.Oct 2008 (123 Kb) [32400] | <div style="border: 2px solid red; padding: 2px;"> Setup (Exe) 15.Jan 2015 (2.9 Mb) [2480] </div> | Setup (ZIP) 16.Jan 2015 (2.6 Mb) [917] |
| | | Flowchart 14.Nov 2005 (12 Kb) [27834] | | |

Pick here please the executable setup file (circled in red above) and save it to your C:\TEMP folder.

setupepidatastat_2.2.2.183.exe

If you are offline but have the course CD-ROM / DVD-ROM, all files are available on it. “Download” them from the drive to your C:\TEMP folder and from there the following steps will be identical.

A setup method to circumvent the requirement for administrator’s rights to install software on your computer

Some users have a PC belonging or linked to a university (or other institution) that explicitly limits access rights to a computer. This reduces the risk of a user installing malicious or other unwanted software / code (broadly also known as “malware”) to a network-linked computer. Different methods exist to prevent users from doing that, e.g. blocking a drive or the entire computer altogether that will block installation. Usually, however, it will be possible to create folders on any drive and to copy downloaded files into such a folder. This is the approach we are employing here, i.e. escaping the usual installation routine for EpiData Manager and EntryClient (but excepting here EpiData Analysis, but see later).

You have already created a folder C:\EPIDATA which will serve as your software folder. If you have unzipping software such as the free open-source 7-zip installed and double-click for instance:

epidataentryclient.2.0.2.13.win.64.zip

you should see its content with two folders and one file:

| Name | Size | Packed | Type | Modified |
|------------------------|-----------|-----------|-------------|-----------------|
| .. | | | File folder | |
| docs | | | File folder | 06-Mar-15 14:37 |
| samples | | | File folder | 06-Mar-15 14:37 |
| epidataentryclient.exe | 3,230,720 | 1,283,290 | Application | 06-Mar-15 14:37 |

Copy / unzip all three (from the correct architecture compatible with your computer) into your C:\EPIDATA folder. From the EpiData Manager zip file, we copy only the *.exe file:

| Name | Size | Packed | Type | Modified | CRC32 |
|--------------------|-----------|-----------|-------------|----------------|----------|
| .. | | | File folder | | |
| docs | | | File folder | 10-Mar-15 0... | |
| samples | | | File folder | 10-Mar-15 0... | |
| epidatamanager.exe | 6,328,320 | 2,262,079 | Application | 10-Mar-15 0... | 0F70C452 |

(the folders are identical in the EpiData Manager and EntryClient zip files respectively). If you cannot unzip because you are missing the software, please see below how to proceed.

With this, we already have everything for working with EpiData Manager and EpiData EntryClient. Note again that it is critical to have the correct version (32- or 64-bit respectively) because neither “upward” nor “downward” compatibility is assured between the two versions.

In your file manager (Windows Explorer® or an alternative), find now the EpiData Analysis setup file:

```
c:\temp\setupepidatastat_2.2.2.183.exe
```

and double-click the file. The installation routine suggests the default installation folder:

```
c:\Program files\EpiData
```

or

```
Program Files (x86)\EpiData
```

While this would be perfectly fine, we recommend installing it instead into the same folder in the root in which we already have the Manager / EntryClient software:

```
c:\epidata
```

The files will be extracted in a breeze.

If you look inside the folder and sort by extension, you see the three *.exe files:

```
epidataentryclient.exe
epidatamanager.exe
EpiDataStat.exe
```

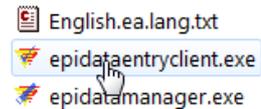
which start respectively any of the three modules that together make up EpiData software.

The approach we chose (circumventing the installation process for Manager and EntryClient) comes at a small cost: access was not written into the Windows® Start menu, but this is easily fixed.

On your Desktop, right-click in an empty space and select New | Shortcut and then Browse for and find the epidataentryclient.exe file:

Type the location of the item:

Browse...



and give it in the Next step an intuitively sensible name:

What would you like to name the shortcut?

Type a name for this shortcut:

And finish to see it on your Desktop:



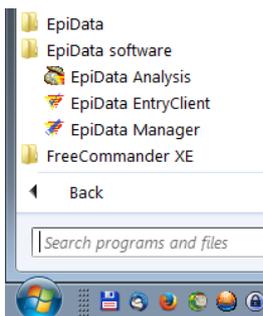
Repeat the procedure for the `epidatamanager.exe` file, and if not yet done during installation, also for the `EpiDataStat.exe` file, so that you have the linking icons to all three on your Desktop:



For fast, single-click access, drag each of the three icons into your Quick Launch bar to get:



Create now on your Desktop a new Folder and name it, say, “EpiData software”, then drag the above three links into that folder. The three icons will “disappear” from the Desktop into the folder. You can now drag the folder into your Start menu (“All programs”) with no need to place it alphabetically correctly as Windows® will take care of that. In this case, there was already a folder “EpiData” for the software on this computer, and the new “EpiData software” was added, showing upon single-click that it has now links to the three software components:



Clicking on any of these will open the respective module.

Getting everything in one zipped package

We have prepared a package named “`epidata_course.zip`” which can be found on the CD-ROM / DVD-ROM or on the web site. If you unzip it into your `C:\` drive, you get the two folders `C:\EPIDATA` containing the software with paths and defaults set, and `C:\EPIDATA_COURSE` containing the folder for the course material. All you need to do is

to make the links to the Desktop, the Quick launch bar and the Start menu as explained above and you are set to go.

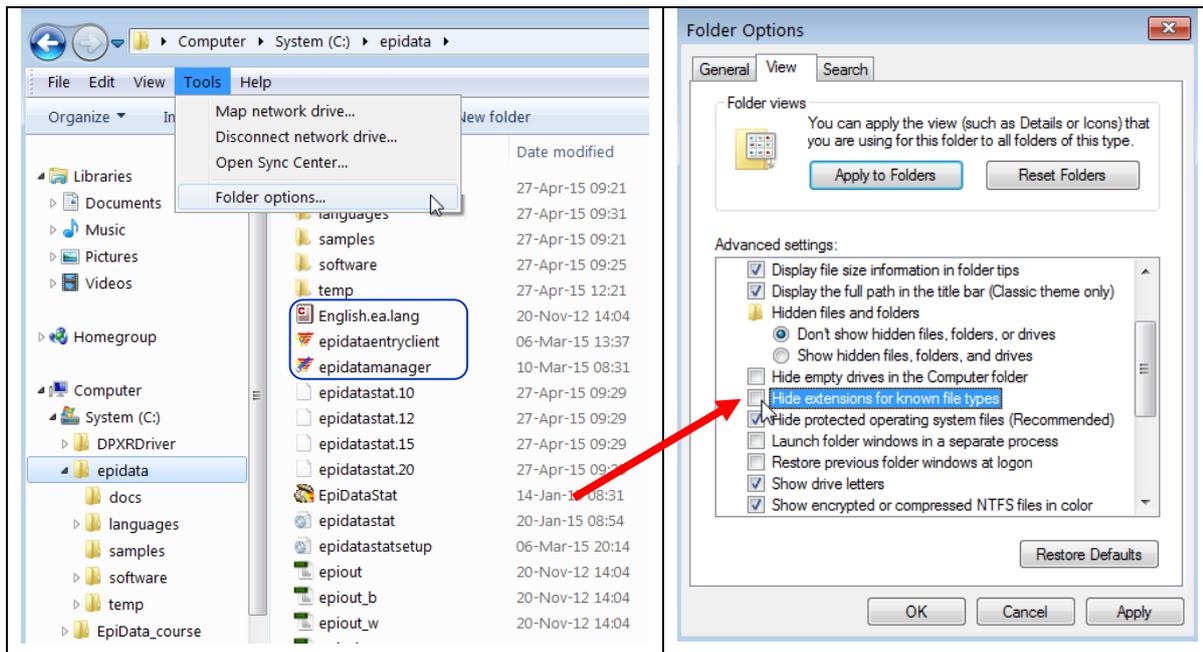
Not able to unzip?

If you are unable to unzip a zip file, it is likely that your computer has no software which can zip and unzip the files. We have provided freely available, high-quality open-source software (7-zip) in the course folder under the navigation panel item Software. Please download and install it. Please ask your facilitator and learn this important skill as you will need it quite often during the course.

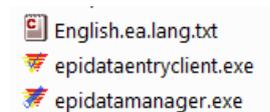
Not able to view the file extensions?

By default, the Windows® setting hides file extensions. However, you will quickly realize that it is essential to know them, thus change the default and make file extensions visible. Let us quickly do this.

Look at the screen shots below. Open any folder on your computer. Click on Organize and choose Folder and search options. A new window opens. Click on the View tab and look for the check box with the description “Hide extensions for the known file types”. By default, the check box is ticked. Click on it to un-tick the checkbox. Click on Apply and then OK to come out of the window.



To visualize the extensions:



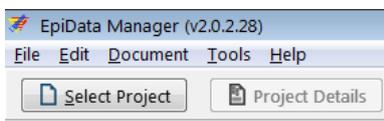
Setting up EpiData Manager

It is important to know the version of the software that you are working with. This serves two important purposes – first, it will let us know whether we are using the latest version. Second, it will be of immense help when you have some problem and are seeking troubleshooting assistance from your colleague/mentor. Letting your mentor know the version of the software you are using will help your mentor understand the problem and help you better. This will be in our next paragraph.

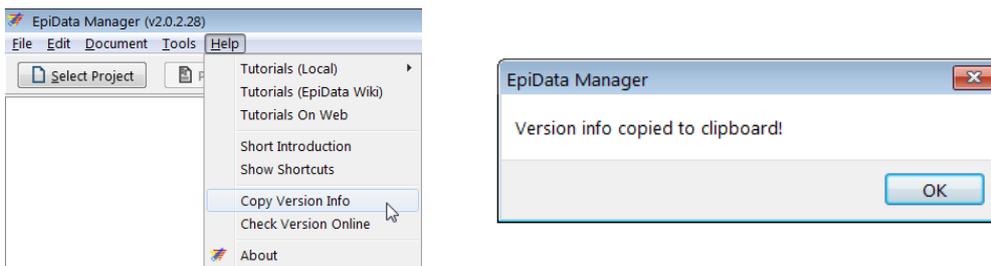
Access EpiData Manager and you note the opening screen:



On the top line we see the software version:



An even greater and more detailed option is to go to Help | Copy Version Info in Manager (identical access also in the EpiData Client):



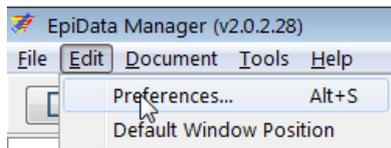
It will be written (and confirmed as such) to the Clipboard and you get it pasted with **CTRL+V** and on this computer the information is:

```
EpiData Manager
Program Version: 2.0.2.28 r1115
Core version: 2.0.0.0 r1126
FPC Version: 2.6.4
Platform: x86_64-Win64
```

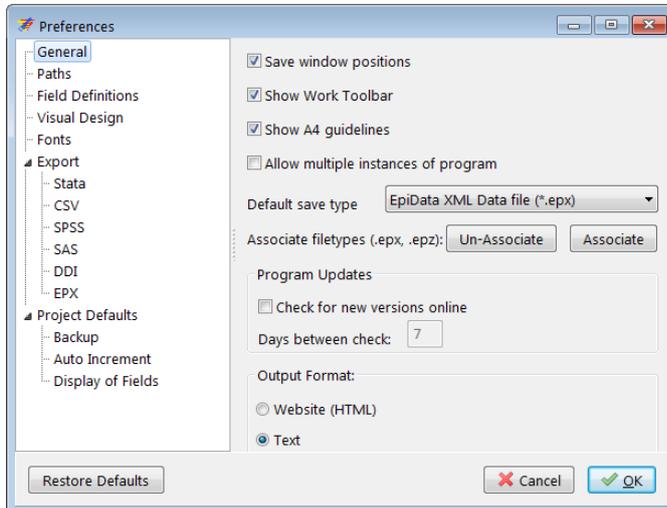
If you post a question to the EpiData list, it would be most useful for those expected to help you to have that information before they need to ask you to supply it! The developers made an effort to keep your life simple with such neat small pieces to aid efficiency! Quite often, users have an outdated buggy version, the problem of which was already solved in an updated version. Rather than forcing the potential assistant to ask back about the version you use, supply it together with your request for help.

Setting Preferences

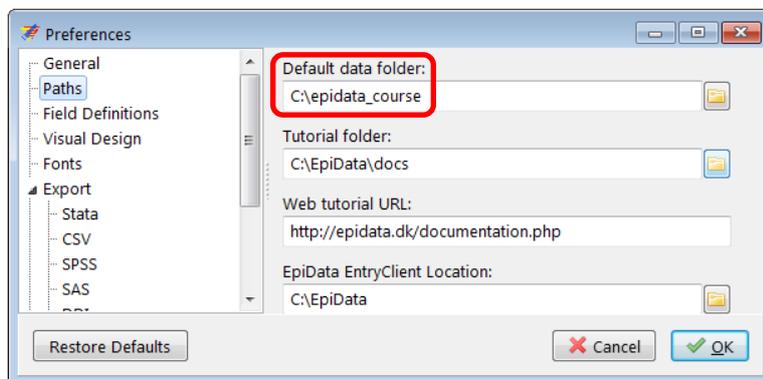
Under Edit we find Preferences, also accessible via shortcut sequence **ALT+E** | **ALT+S**:



and we get an extensive menu:

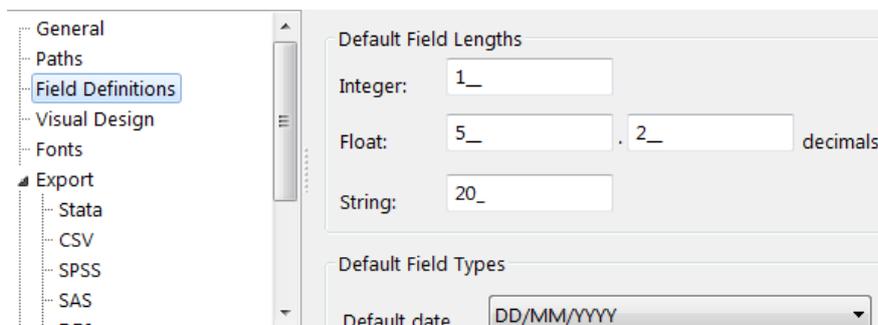


For our initial setup, we will make only a few major and necessary menu settings. We suggest that you study this in detail (every point) on your own sweet time. Of key importance is to set the correct Paths, most notably changing the Default data folder to our course working directory `C:\EPIDATA_COURSE`:

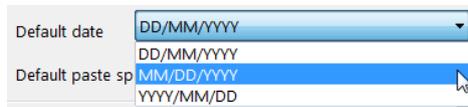


The other three paths remain unaltered as the default already defined by EpiData Manager.

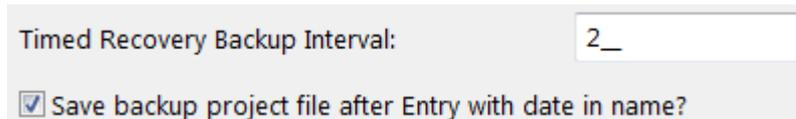
In the Field Definitions, we could set various defaults for the different field types:



For the time being, we allow the default proposed by EpiData. Note perhaps the Default date which is set to European style, but we could set an “American” or a “Chinese” date (critical is to set it to what you are culturally used to reduce the risk of data entry errors):

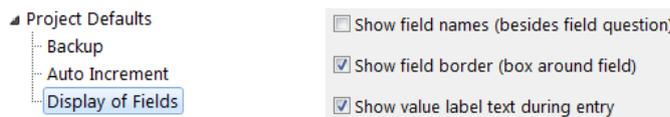


EpiData writes the data you enter first into memory, not immediately to hard disk. It does the latter after intervals you can set under Project Defaults | Backup and we recommend for the beginner to change the default from 10_ to 2__ (minutes):



Note that while shorter times are convenient against loss (due to an OS crash), they come at a cost: writing backups takes time, unnoticeable for small datasets, notable as the database grows. Before you exit a data file, you will always be prompted to save, you cannot leave the data inadvertently unsaved.

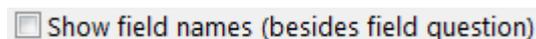
A note perhaps on Display of fields:



While we come back to the variables in the first exercise, it may be noted here that the name of a variable (we call it “Field name”) usually requires a certain format with respect to case, length, and permissible characters, while one is quite free with the so-called “Field label”, the name that explains the field. For instance, we may have a field name `age`, and the field label could be “Age in years at last birthday”. In EpiData 3.1 (and Epi Info 6), one option was the standard to display both next to each other, followed by the field definition like:

| | | |
|-----|-------------------------------|-----|
| Age | Age in years at last birthday | ### |
|-----|-------------------------------|-----|

It was possible to suppress the field name by taking recourse to “automatic field naming”, but it required to write the data entry form quite differently and admittedly a bit complex and not so user-friendly. With EpiData Manager, the solution is a simple one for the user: tick or untick the:



Because the field name is of no use for the data entry person (we require working with it in analysis), we keep this unticked (but we see the field name clearly when we create the data entry form).

Preferences in EpiData EntryClient

We open EpiData EntryClient, and also choose Edit | Preferences. We change the data path to `C:\EPIDATA_COURSE` and leave the Colours as they are set by default: when using the

software in the EntryClient module we will learn practically if the colors are convenient, easy for the eye, and allow distinguishing the important components. This is also often individually different.

For the time being, these minor adjustment shall suffice.

At the end of this chapter, you should have done the following:

1. Installed EpiData Manager, EntryClient, and EpiData analysis (look for folder EpiData in C: drive)
2. Created desktop shortcuts or quick launch bar icons for the software components and checked their functionality
3. Created working directories in C: folder (named epidata_course and temp).
4. Have set the options in EpiData Manager and EntryClient software

If you have done the above steps successfully, we are now ready to move ahead!