

## Preparatory steps before you begin

### If the course comes on a CD-ROM

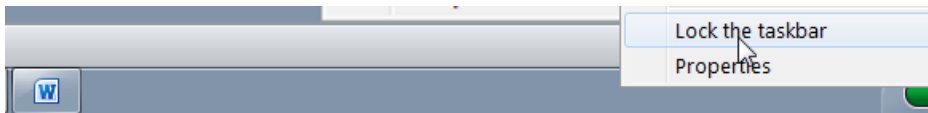
If your course is on a CD-ROM, it might be easiest to copy its entire content, i.e., the folder containing the course, to your computer hard disk. One level below the folder, you will see a file:

index.html

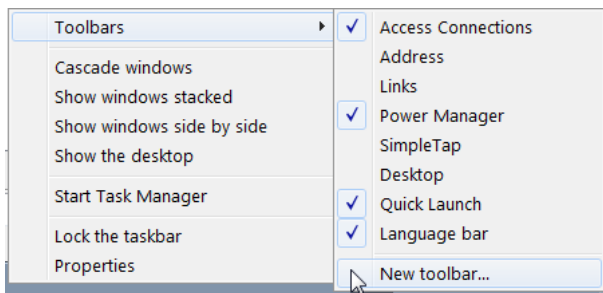
This is the name commonly given by convention to the opening page (the “home page”) of a web site. Indeed, the course material is organized like a web site. If you double-click on this file (INDEX.HTML), the web opens in your default browser. For fastest access to the web you might wish to make a short-cut 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:

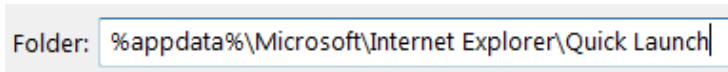


then right-click again and choose “Toolbars” | “New toolbar”:



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 EpiData software, both EpiData Entry 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 and very useful and 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 our final destination on our PC.

## Installation of EpiData Entry and EpiData Analysis

EpiData Entry is a very small executable file. Although it is Windows®-based, it does not interfere with your Windows® set-up: all files are placed in a single directory (“folder” in Windows® terminology) without leaving any trace of it anywhere else on your system (no \*.dll files).

### If you have administrator’s rights to install software on your computer

Save the file from the Internet or from the CD-ROM if you are in an in-class course by going to the home page and look for the Software in the navigation panel on the left and click it. In the opening page, look for EpiData Entry and click on the link. In the File download window that opens, click Save (not “Open”). Select your directory of choice [we propose that you use the TEMP folder rather than some Windows® default folder “download” that one may have difficulties to find] and click Save. Repeat the same procedure for EpiData Analysis.

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

```
c:\temp\setup_epidata.exe
```

and double-click the file. You will be suggested the default installation folder:

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

While this is perfectly fine, we recommend installing it instead into the root:

```
c:\EpiData
```

typing over the default that is offered and continue to follow the instructions. Of course, you may install EpiData Entry in the default folder c:\Program files\EpiData, but if you work in a place where installation of software is strictly controlled, this might be precisely the folder that is checked for non-approved program files.

The files will be extracted in a breeze. Among the files you see one named EpiData.exe

Right-click on this file, go to Send To and Desktop (create shortcut) and click the latter. Drag the icon from the desktop down to the Quick Launch taskbar. This allows it to be visible from within each program, being just a single click away.

Similarly, install the EpiData Analysis file in the same folder:

```
c:\epidata
```

following the instructions and create a short-cut.

## Using EpiData software if you do not have administrator's rights to install software on your computer

Because EpiData software is not interlinked in anyway with the Windows® operating system, an installation is actually not really required. You can download the zip files from the EpiData website, and follow the instructions in the `readme.txt` file or ask your facilitator for assistance. We have also prepared a zip file, available on the CD-ROM, which contains the entire package (EpiData Entry and EpiData Analysis). Just unzip it to the root of the drive to which you have access (or, failing that, any place you have access to).

This is one of the unique things about EpiData installation – it does not require to be installed! All the files required for the functioning of the software are contained in a single folder which can be carried around on a portable memory drive and can be used to begin your work quickly on any computer you have access to. It is an essential principle of EpiData not to interfere with the setup of your computer. (In technical terms: EpiData comes as a few files and does not depend on, install or replace any `.DLL` files in your system directory. Options are saved in an `.INI` file).

## Not able to unzip?

If you are not able to unzip the folder, it is likely that you do not have access to a tool which can zip and unzip the files. We have provided freely available, high-quality software (named 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.

Once you have unzipped successfully, you should find a folder `EpiData` in the destination folder. Note though that for apparent reasons, there will be no links to the executable files in the Windows® Start menu: best to make such a link to each of the two executable files on your desktop (then drag to the Quick Launch bar). The two files are:

```
\epidata\EpiData.exe      [to access EpiData Entry]
\epidata\EpiDataStat.exe  [to access EpiData Analysis]
```

Note the corresponding icons for the two softwares.



EpiData Entry

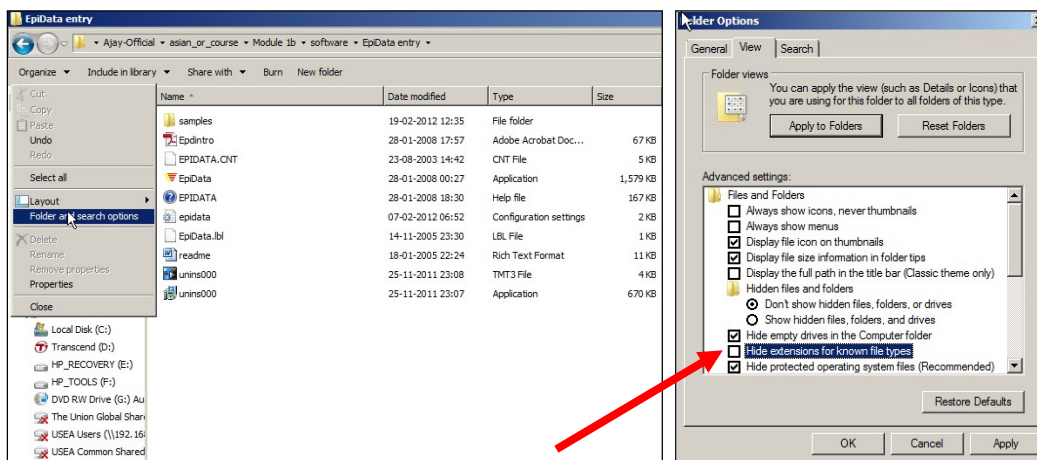


EpiData Analysis

## Not able to view the file extensions?

By default and for reasons unknown, the Windows® setting hides the file extensions. However, you will quickly realize that it is essential to change it and make the file extensions visible. The three key files we will be working with in EpiData, namely QES, REC and CHK files (you will know their meaning in the next chapters) can only be distinguished by their extensions. These are called EpiData triplet files and will have the same name for a given set but have different extensions. If the file extensions are not visible, then we will not be able to distinguish between the files. Let us quickly do this.

Look at the screen shots below. Open any folder in 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. You will now notice that the file extensions are visible.



### Accessing the EpiData Entry Help file

Windows® has changed the way Help files are being accessed but the necessary plug-in is not part of the operating system in which this change came into effect. As a result, users of Windows Vista® or Windows 7® cannot directly access the EpiData Entry Help file. Windows® expects you to visit its web site:

<http://support.microsoft.com/kb/917607>

and then follow a lengthy process that includes validating that your Windows® version is genuine and then download and install the appropriate plug-in for either 32-bit or 64-bit machines. If you have administrator’s rights, we have a workaround that makes life a bit easier. You need to know two things about your computer:

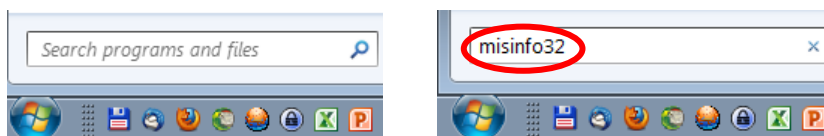
Vista® or Windows 7®?

32-bit or 64-bit?

If you do not know, then type:

msinfo32

into the Windows® Search bar:



[Enter], and you get both pieces of 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

Alternately, you can right-click on My Computer and click on Properties. You will be able to find the system type and operating system. There are four possibilities:

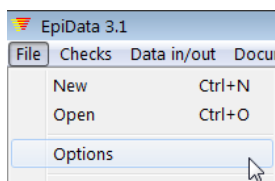
Windows Vista®, 32-bit	requires	Windows6.0-KB917607-x86.msu
Windows Vista®, 64-bit	requires	Windows6.0-KB917607-x64.msu
Windows 7®, 32-bit	requires	Windows6.1-KB917607-x86.msu
Windows 7®, 64-bit	requires	Windows6.1-KB917607-x64.msu

For each of these, you need a different file as shown above. All four are available on the CD-ROM. Download the one applying to you to the `\temp` folder, double-click and follow the instructions. It should work smoothly without prompting to check whether your Windows® is indeed genuine.

## Setting Options in EpiData Entry

EpiData software is not laid out to be flashy; its focus is on functionality. Nevertheless, certain options that might appear to be for aesthetics actually serve functionality. We will choose some of the most pertinent options to change the default display. *We must alert you here that you may not understand fully all the options and the reasons for our recommended choices.* However, we suggest that you do as recommended and you will appreciate the detailed rationale as you progress on your learning curve.

Go to “File” | “Options”:



where several tabs allow adaptation of various parts of EpiData Entry:

Note that any change you make here is specific for your PC, and is not retained for another PC unless you also pass on the `EPIDATA.INI` file where these settings are stored. You can also change these settings at any time, including in the middle of data entry. This is particularly handy as the font size you need for entering data might differ from the font size you want to use for a projection in class.

Let us look at the first tab: Editor. Any changes we make here affect the text editor of the software – used in making `QES` and `CHK` files.

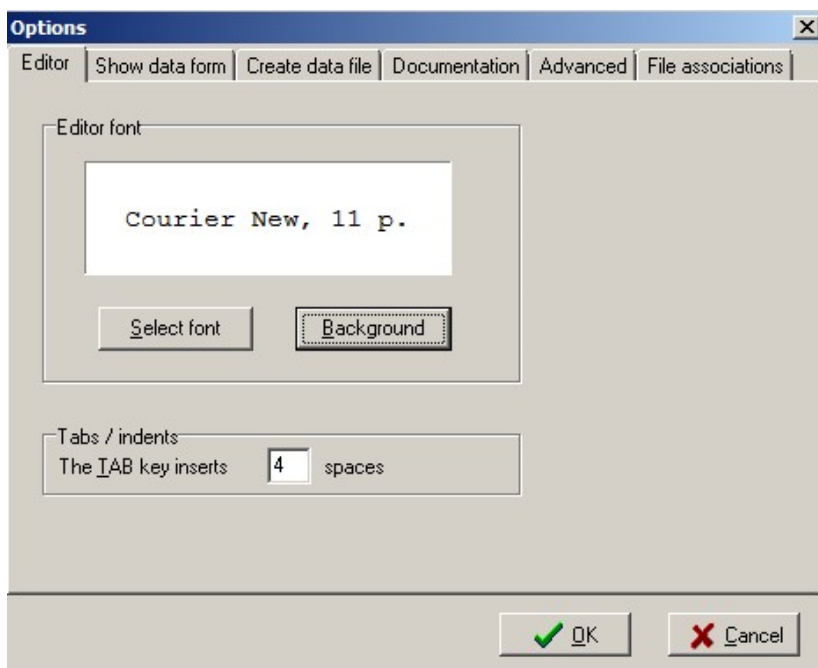
Fonts are important. For our daily life when we read books we prefer a *proportional font*, like one from the *Roman* family. With proportional fonts, each key takes only as much space as the letter requires, as here shown for the difference between a series of ten “l” and ten “m”:

llllllllll  
mmmmmmmmmm

While this is ideal for reading a book, it makes life very difficult when writing code in a program. Here we prefer a *non-proportional font*, such as from the *Courier* family, where each letter takes exactly the same space:

llllllllllll  
mmmmmmmmmm

In EpiData, we are thus definitely going to make use of a non-proportional font, whatever we are going to do. Chose the font size you think is convenient for you, but stick with Courier.



We recommend that you choose the background color to be white.

Let us now look at the next tab: Show data form. Any changes we make here will affect how the data entry form will look like (REC File). Choose the font and background color as described above.

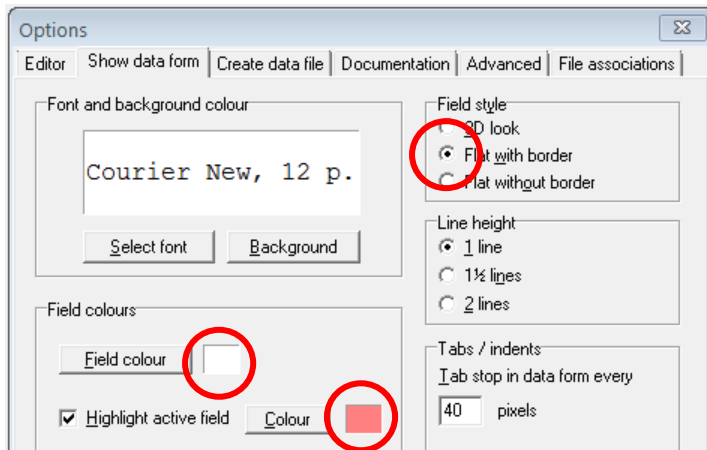
Font for forms: Courier

Background color for forms: White

Field Style (the way data entry fields appear on the form): 'Flat with border'

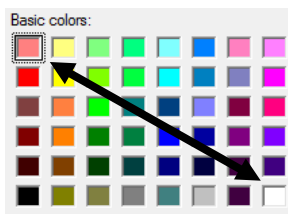
You may leave the other options under “line height” and “tabs/indents” as it is.

Also important is the choice of the field colors. They shouldn't be straining on the eye. The default of EpiData is actually something that will give you a sore eye after just an hour of work if not earlier. You may make your own choice, but here are three things that we recommend because they have stood the test of data entry:

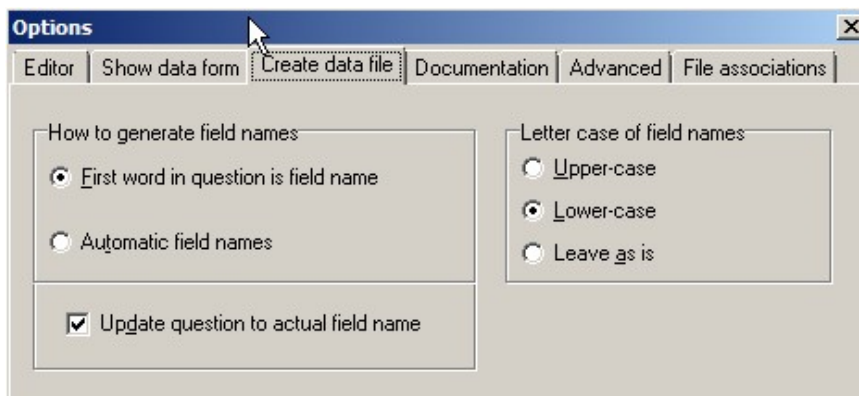


Field color (background color for data entry fields): White

Highlight active field (Shows the currently selected field in a different color): choose purplish color which is in the diagonal of the white for the first:



Let us look at the third and the most important tab: Create data file.

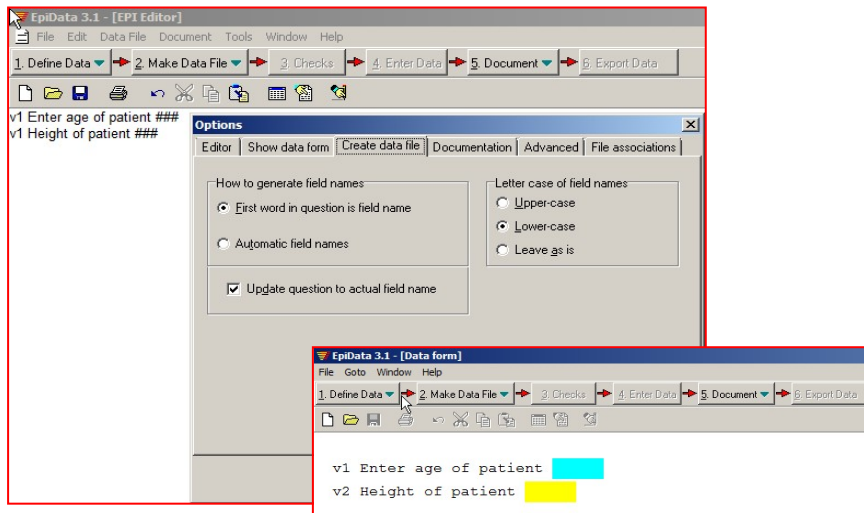


Leave the letter case of field names as “Lower-case”. This will ensure that the variable names will be in lower case irrespective of what is typed when it is exported for data analysis. Though EpiData is not case-sensitive, some other analysis software is (e.g., Stata® and R). Hence, it is a good practice to keep all the field names as lower case.

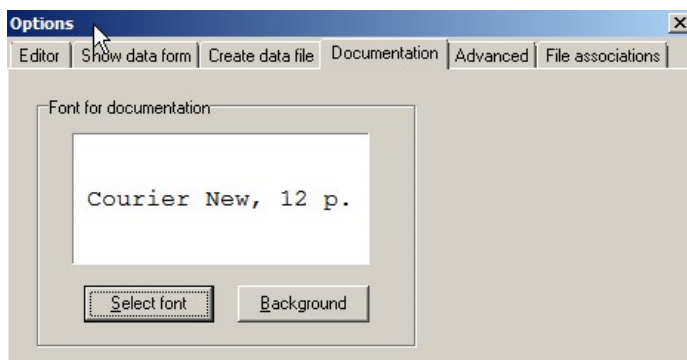
There are two ways of generating a field name or variable name: either let the software generate field names automatically (first eight characters of the sentence) for you or take control and ensure that the first word in every question is the field name. We recommend the latter approach as that helps you to be in command and you can choose your field names and make it as intuitive as possible. *Remember to close all the files before changing options for it to take effect.*

Tickling “Update question to actual field name” will help ensure that every variable has a unique name (one of the important pre-requisites) even though by chance you type the same variable name in the QES file. Look at the screenshot below and carefully note that the

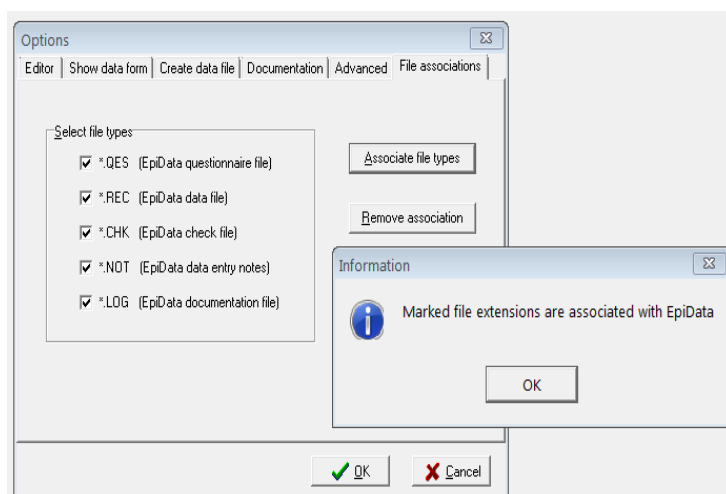
variable name of second variable, though typed as v1 (same name as the first variable) in QES file, it got modified (updated) automatically in the REC file as v2.



The next tab is about setting the font and background of documentation forms (.NOT and .LOG files)



There are some options in the 'Advanced' tab; leave them as they are. Finally, in the 'File associations' tab, tick all the file types and click on 'Associate file types'. This will help open files in EpiData when double clicked in Windows Explorer®.





Which version of the software are you working with?

It is good to know the version of the software that you are working with. This helps in two important uses – 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.

How will we know this? It is usually mentioned in the left top corner of the home page of the software. Alternately, you may select Help in the menu bar and click on “About EpiData”. This will describe the software version you are using.

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

1. Installed EpiData entry and EpiData analysis (look for folder EpiData in C: drive)
2. Created desktop shortcuts or quick launch bar icons for both the softwares and checked their functionality.
3. Be able to access and read the HELP file (having installed the appropriate plug-ins)
4. Created working directories in C: folder (named epidata\_course and temp).
5. Have set the options in EpiData entry software

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

Let us begin the exciting journey of EpiData!!