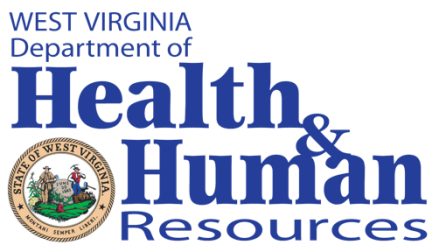

Epi Info and SQL Server Express 2019 Installation and Configuration Guide

BBH SOC Data Collection and
Management System
Version 2.0



Prepared for: West Virginia Department of Health
and Human Resources

Prepared by: West Virginia University
Health Affairs Institute

For inquiries, please contact:
dhhrbbhepiinfo@wv.gov

Sept. 11, 2023

Table of Contents

| | |
|---|----|
| Table of Contents..... | 2 |
| 1 Background..... | 3 |
| 2 New User Installation of BBH SOC Epi Info | 3 |
| 3 Users Migrating from Version 1 to Version 2 of BBH SOC Epi Info | 31 |

1 Background

The West Virginia (WV) Department of Health and Human Resources (DHHR), Bureau of Behavioral Health (BBH) customized the data collection and management software designed by the Centers for Disease Control and Prevention called Epi Info for providers to securely enter and submit program reporting data, including sensitive health information from clients receiving services from BBH System of Care (BBH SOC) grant recipients.

This installation guide provides instructions for installing V2 for new BBH Epi Info users, and how to convert from V1 to V2 for existing users. To use the BBH's Epi Info system, providers will need to download and install the following items from the BBH SOC website <https://dhhr.wv.gov/BBH/data/Pages/Epi-Info.aspx>:

- **CDC's Epi Info software.** Please download Epi Info from the BBH's website to ensure that the right version is installed.
- **Microsoft SQL Server Express 2019.** SQL Server Express is a free version of Microsoft's SQL Server database software. Epi Info will use this database software to store entered data.
- **BBH SOC Epi Info project files.** Once the applications above are installed, the project files contain the necessary Epi Info forms that need to be stored on your computer to fully deploy the system and start entering data.

IMPORTANT INSTRUCTIONS: If you do not have BBH's Epi Info system on your computer, you will need to follow the instructions above, along with the steps outlined in the next section entitled "New User Installation of BBH SOC Epi Info." If you already have BBH's Epi Info system on your computer, please follow the instructions in the section "Users Migrating from Version 1 to Version 2 of BBH SOC Epi Info" in this document.

This guide documents how to install and configure the programs needed to use BBH's Epi Info data collection and management system. Users will need to refer to the **BBH SOC Epi Info User Guide, Version 2.0** (on the BBH SOC web page) to learn how to navigate and enter data in the forms within Epi Info.

Please be sure to provide this installation guide to any IT personnel who might assist you with the installation and configuration of the software.

2 New User Installation of BBH SOC Epi Info

The information in this section is for users who have **never** installed the BBH SOC Epi Info software previously. This section provides instruction for the complete installation of all components of BBH's Epi Info system Version 2.0.

2.1 Installing the Epi Info Software

2.1.1 What is Epi Info?

Epi Info is statistical software developed by the CDC to assist data collection. It provides easy data entry form and database construction, a customized data entry experience, and data analyses with epidemiologic statistics, maps, and graphs for public health professionals. There are a series of forms within Epi Info that will allow you to create records for client, program-specific activity, and events within the SOC.

2.1.2 System Requirements

Epi Info will only run on computers that use the Microsoft Windows operating system. We strongly recommend only using versions of Windows that are currently supported by Microsoft. Epi Info will not run on Apple OS, or mobile devices.

2.1.3 How to Download the Epi Info Software

The version of Epi Info that is required for BBH SOC is only available from the **BBH SOC web page**: <https://dhhr.wv.gov/BBH/data/Pages/Epi-Info.aspx>.

Note: There is a version of Epi Info that is available from the CDC website. This version is not supported by BBH, and you will *not* be able to successfully enter and submit data unless you use the version of Epi Info that is available from the BBH SOC web page.

2.1.4 How to Install the Epi Info Software

Once you have located the download link on the BBH SOC web page, please follow these steps to install the application. If you have an older version of Epi Info installed, refer to the section below “How to Uninstall the Epi Info Software” before continuing:

1. Click the “CDC Epi Info” link to download the Epi Info software. The file is very large, so the download may take a few minutes. The download file is in .zip format.
2. Once the file is downloaded, locate the file, and unzip (extract the file to your hard drive). To unzip, right click on the file and click “Extract All”.
3. When asked where to extract the files to, please select a location on your hard drive that you will remember, such as C:\Epi Info\. Please do **NOT** store this under C:\Program Files, else depending on your setup, Windows may prevent you from accessing the extracted files. If the folder does not exist, it will be created when extracting the files.
4. **Note:** The folder where Epi Info is installed should **NOT** be the same folder that is used in the section below “Create a Folder for SOC Epi Info Project Files”. The Epi Info software should be in a different folder than the SOC Epi Info project files.

2.1.5 To confirm that Epi Info has been installed correctly:

1. Locate the folder where you extracted the zip file above. You should see a file called “Launch Epi Info 7.exe”.
2. Double click on “Launch Epi Info 7.exe”

You will see the Epi Info launch screen open (see below)



2.1.6 How to Uninstall the Epi Info Software

If you already have Epi Info installed, but need to install a newer version:

1. Locate the folder on your computer where the Epi Info software is installed (C:\Epi Info, or similar). You should see the “Launch Epi Info 7.exe” file.
2. Delete all files and folders that exist in this folder. You can leave the C:\Epi Info folder in place and use it for the new installation.

2.2 SQL Server Express 2019

2.2.1 What is SQL Server Express?

SQL Server 2019 Express is a free edition of Microsoft's SQL Server software. SQL Server Express significantly improves the speed of the system and helps speed up data entry. Although Epi Info does work with Microsoft Access, that configuration is not supported by BBH for this data collection effort.

Note: for instructions on how to use a network-based installation of SQL Server, please look below for the section "**Using a Network-based version of SQL Server**".

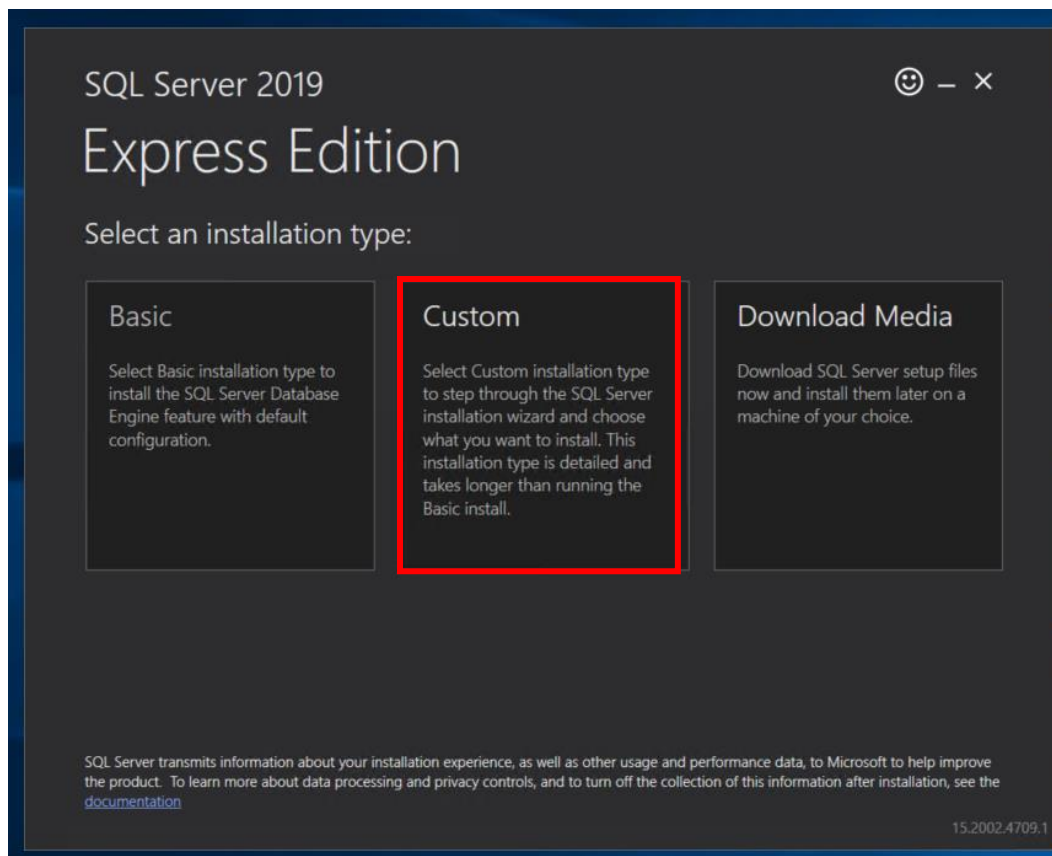
2.2.2 How to Download SQL Server Express

Microsoft SQL Server Express can be downloaded from the Microsoft web site. Please use the link located on the **BBH SOC web page** (<https://dhhr.wv.gov/BBH/data/Pages/Epi-Info.aspx>)

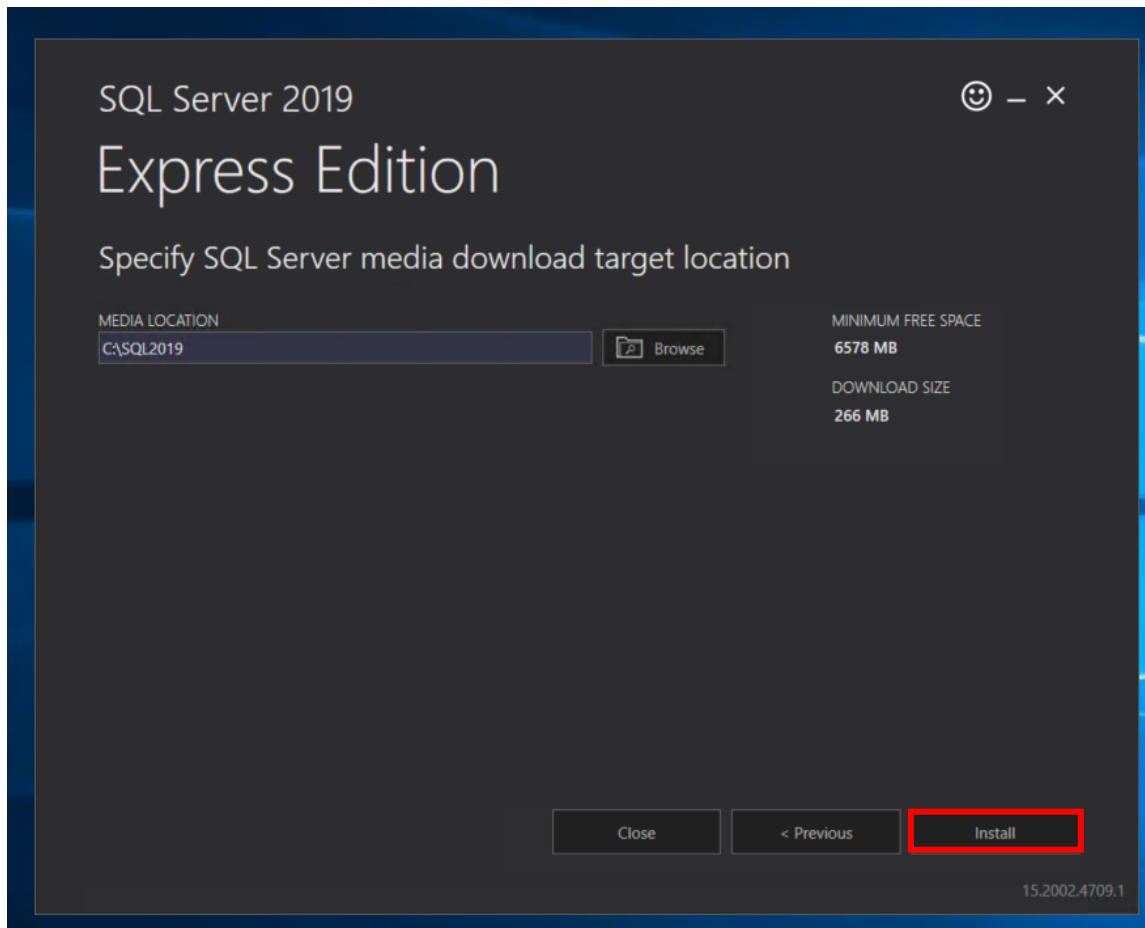
2.2.3 How to Install SQL Server Express

Once you have located the download link on the BBH SOC web page, please follow these steps to install the application.

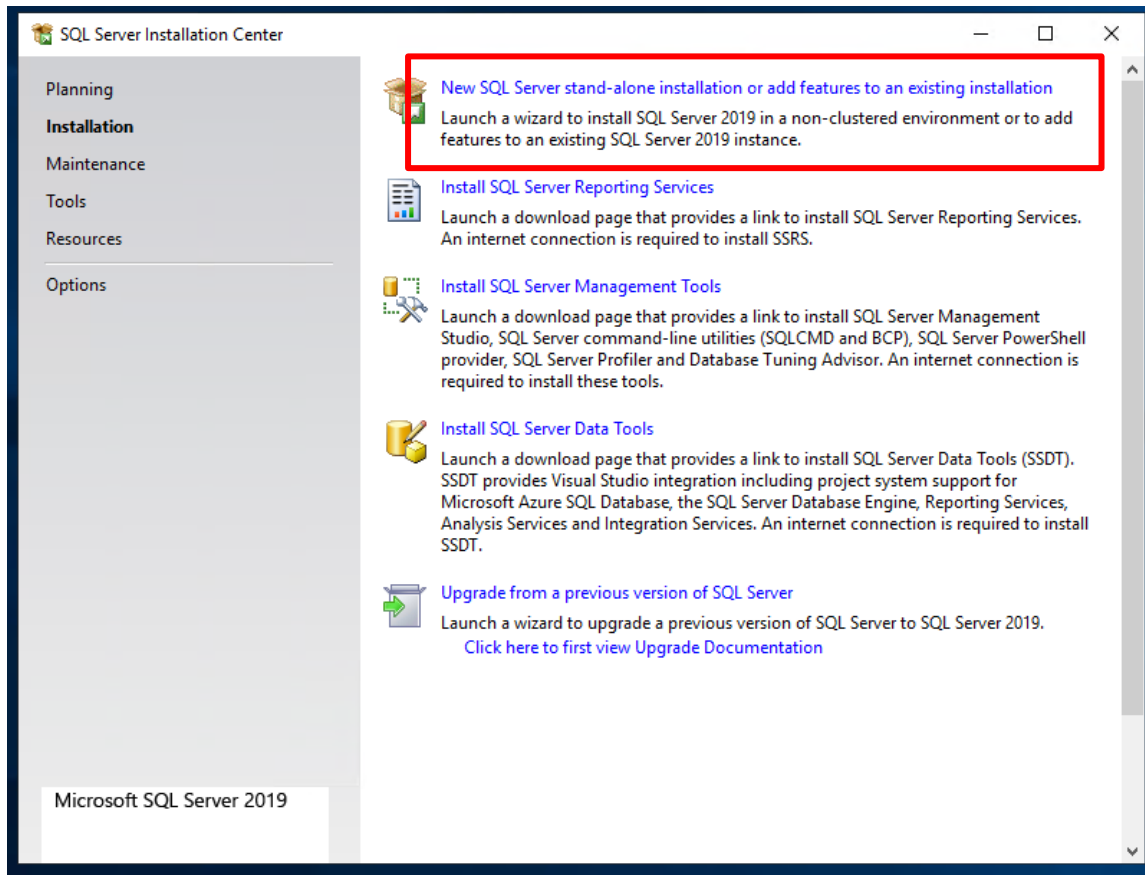
1. Click the "Microsoft SQL Server Express 2019" link to download the software.
2. Once the file has downloaded in your browser, click the file to begin the installation.
3. Select "Custom"



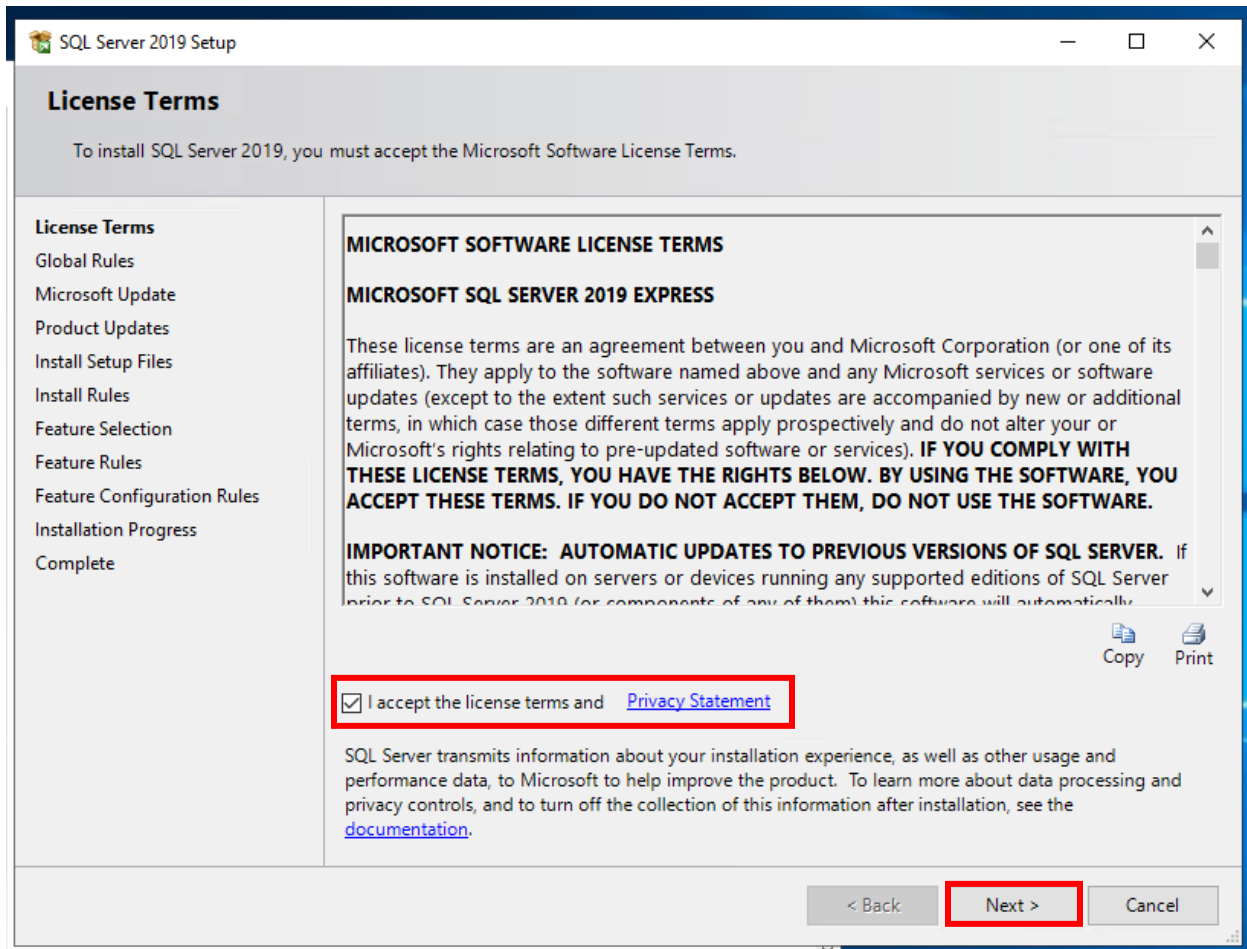
4. Click "Install" to continue.



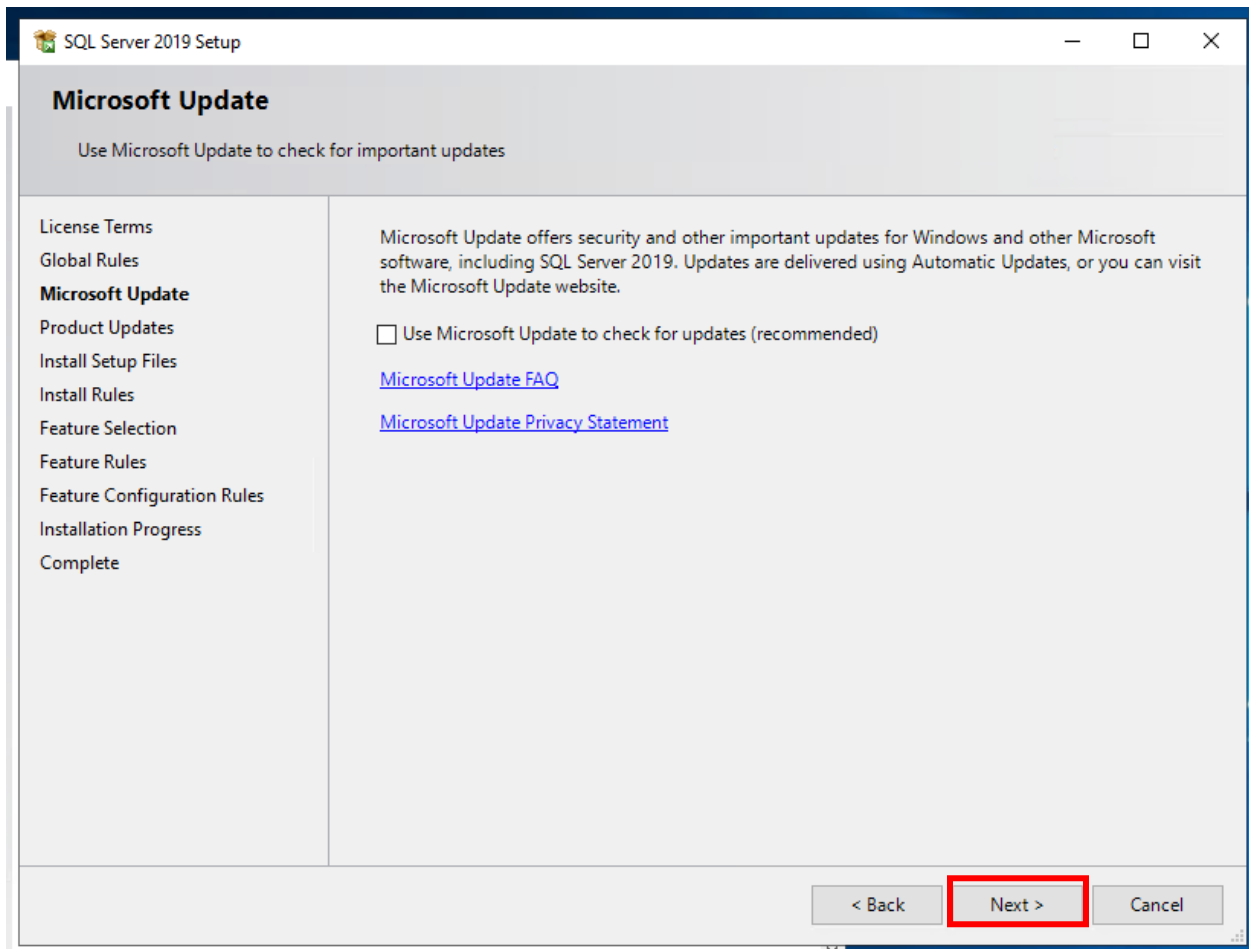
5. Click the first link “New SQL Server stand-alone installation or add features to an existing installation.”



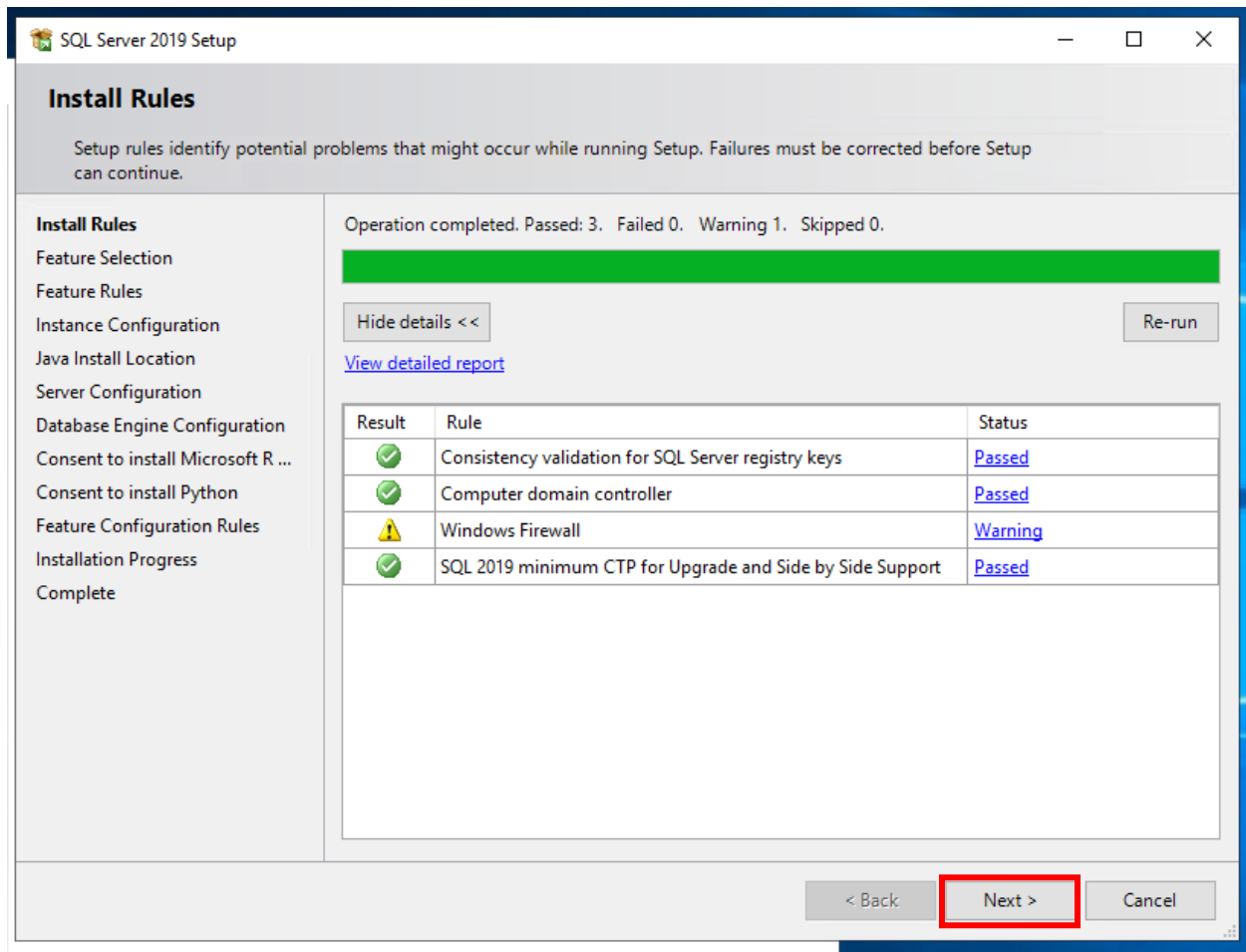
6. Click the “I accept the license terms and ...” checkbox to accept the terms and conditions.



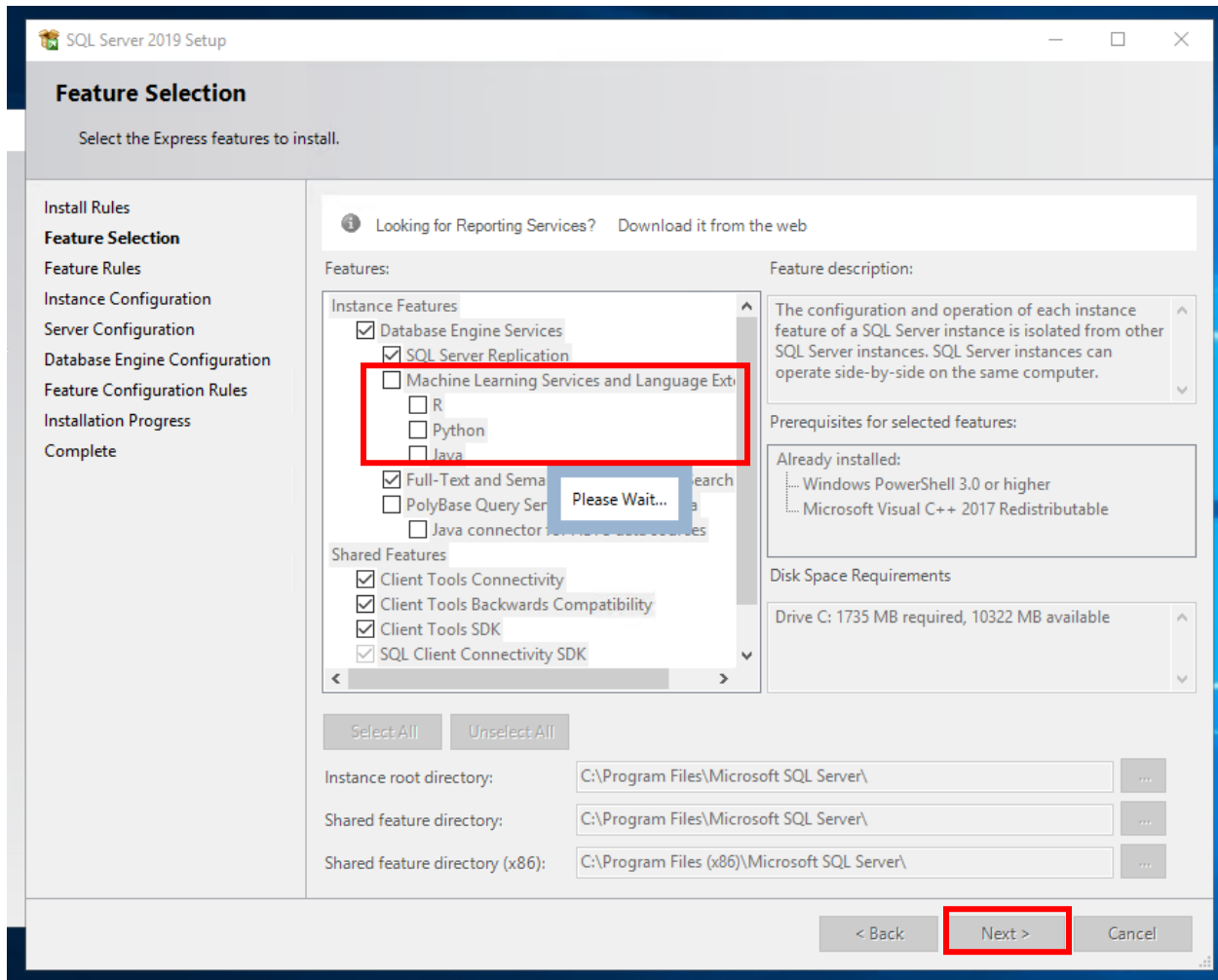
7. Click "Next"



8. Click “Next” to continue.



9. Uncheck “Machine Learning Services and Language...” checkbox.
10. Click “Next” to continue.



11. Click “Next” to continue.

SQL Server 2019 Setup

Instance Configuration

Specify the name and instance ID for the instance of SQL Server. Instance ID becomes part of the installation path.

Install Rules
Feature Selection
Feature Rules
Instance Configuration
Server Configuration
Database Engine Configuration
Feature Configuration Rules
Installation Progress
Complete

☐ Default instance
☒ Named instance:

Instance ID:

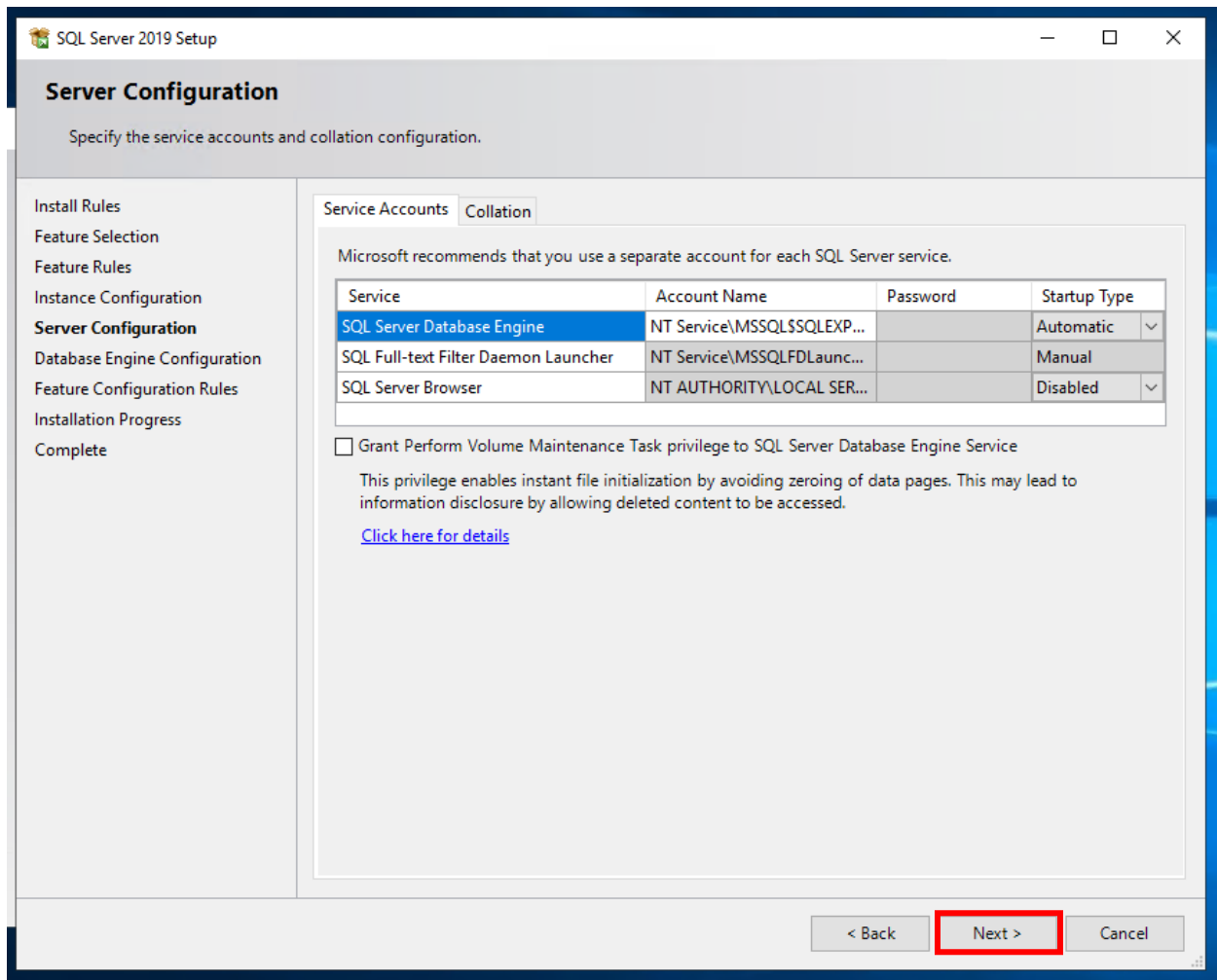
SQL Server directory: C:\Program Files\Microsoft SQL Server\MSSQL15.SQLEXPRESS

Installed instances:

| Instance Name | Instance ID | Features | Edition | Version |
|---------------|-------------|----------|---------|---------|
|---------------|-------------|----------|---------|---------|

< Back **Next >** Cancel

12. Click “Next” to continue.



SQL Server 2019 Setup

Server Configuration

Specify the service accounts and collation configuration.

Install Rules
Feature Selection
Feature Rules
Instance Configuration
Server Configuration
Database Engine Configuration
Feature Configuration Rules
Installation Progress
Complete

Service Accounts Collation

Microsoft recommends that you use a separate account for each SQL Server service.

| Service | Account Name | Password | Startup Type |
|--------------------------------------|-----------------------------|----------|--------------|
| SQL Server Database Engine | NT Service\MSSQL\$SQLEXP... | | Automatic |
| SQL Full-text Filter Daemon Launcher | NT Service\MSSQLFDLaunc... | | Manual |
| SQL Server Browser | NT AUTHORITY\LOCAL SER... | | Disabled |

☐ Grant Perform Volume Maintenance Task privilege to SQL Server Database Engine Service

This privilege enables instant file initialization by avoiding zeroing of data pages. This may lead to information disclosure by allowing deleted content to be accessed.

[Click here for details](#)

< Back **Next >** Cancel

13. Click “Add” button to add a user as an administrator. “Select Users or Groups” dialog will appear.

SQL Server 2019 Setup

Database Engine Configuration

Specify Database Engine authentication security mode, administrators, data directories, TempDB, Max degree of parallelism, Memory limits, and Filestream settings.

Install Rules
Feature Selection
Feature Rules
Instance Configuration
Server Configuration
Database Engine Configuration
Feature Configuration Rules
Installation Progress
Complete

Server Configuration | Data Directories | TempDB | Memory | User Instances | FILESTREAM

Specify the authentication mode and administrators for the Database Engine.

Authentication Mode

☒ Windows authentication mode
☐ Mixed Mode (SQL Server authentication and Windows authentication)

Specify the password for the SQL Server system administrator (sa) account.

Enter password:
Confirm password:

Specify SQL Server administrators

| |
|---|
| EC2AMAZ-GMJ0RG1\Administrator (Administrator) |
|---|

SQL Server administrators have unrestricted access to the Database Engine.

Add Current User | **Add...** | Remove

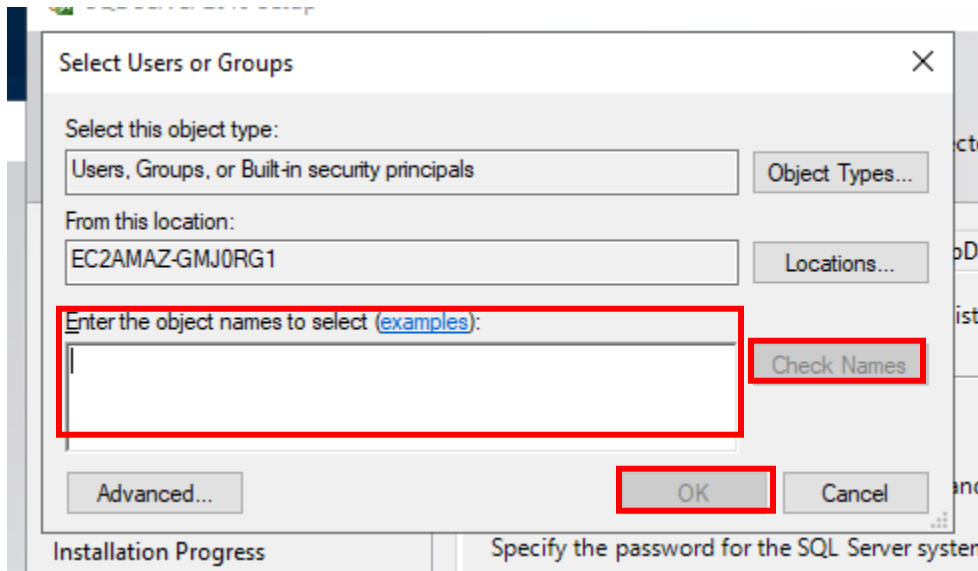
< Back | Next > | Cancel

14. Enter the windows account username in “Enter the object name to select” textbox.

IMPORTANT: This is the windows account name of the user that will be entering data. If you are the one that will be entering data with Epi Info, put your windows username. If you are an administrator that is installing SQL Server on behalf of another user, put their windows username.

15. Click “Check Names” button to verify the username.

16. Click “OK” to continue.



17. The newly added username should be listed on the "Specify SQL Server administrators" box.
18. Click "Next" to continue.

SQL Server 2019 Setup

Database Engine Configuration

Specify Database Engine authentication security mode, administrators, data directories, TempDB, Max degree of parallelism, Memory limits, and Filestream settings.

Install Rules
Feature Selection
Feature Rules
Instance Configuration
Server Configuration
Database Engine Configuration
Feature Configuration Rules
Installation Progress
Complete

Server Configuration | Data Directories | TempDB | Memory | User Instances | FILESTREAM

Specify the authentication mode and administrators for the Database Engine.

Authentication Mode

☒ Windows authentication mode
☐ Mixed Mode (SQL Server authentication and Windows authentication)

Specify the password for the SQL Server system administrator (sa) account.

Enter password:
Confirm password:

Specify SQL Server administrators

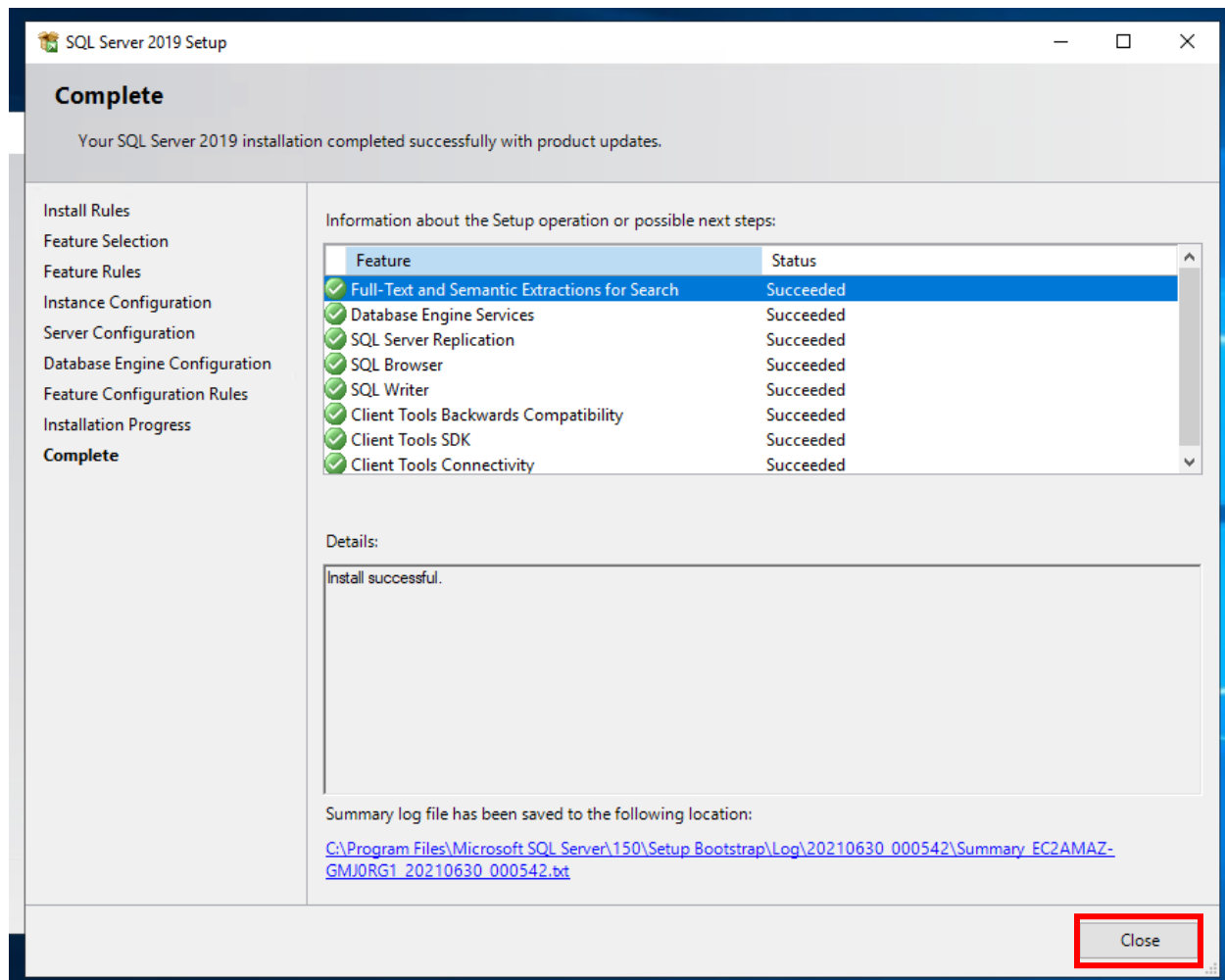
| |
|---|
| EC2AMAZ-GMJ0RG1\Administrator (Administrator) |
| EC2AMAZ-GMJ0RG1\ashrestha (ashrestha) |

SQL Server administrators have unrestricted access to the Database Engine.

Add Current User | Add... | Remove

< Back | **Next >** | Cancel

19. Installation completed.
20. Close all open windows.



2.3 Using a Network-based Version of SQL Server

If your company or office already supports SQL Server on their network, then it may be possible for you to leverage existing servers on your network, instead of installing SQL Server Express on your local workstation. **Please note that this type of installation requires a certain level of technical experience, so the options below are only recommended if you have technical support that can assist. It is highly recommended that you provide the instructions below to your technical support staff.**

There are two options for using a network-based installation of SQL Server: **shared**, or **individual** databases.

A **shared** database means that a single Epi Info database is installed on a network server, with multiple users having access. All users will be able to enter their own data but will also be able

to see and edit data being entered by other users. When submitting data, only one user will have to package the data. The data package will include everyone's data.

To set up a **shared** Epi Info database on a network server, follow the steps below:

1. Create a SQL Login (SQL user) with permission to create a database.
2. Follow the steps in the next section "**Installing the BBH SOC Version 2 Project Files in Epi Info**," but use the network SQL Server path and SQL login created above.
3. Once the .PRJ file is created, this can be distributed to all users that will be connecting to this shared database. They can all use the same .PRJ file to access the forms via Epi-Info. The .PRJ file will include the SQL Server path, and authentication information, which will be the same for all users.

Note: When working in a **shared** Epi Info database, it is possible for users to edit each other's data, and Epi Info will not prevent the same record from being simultaneously edited by multiple users. Please use caution when using this option.

An **individual** database means that your Epi Info database is installed on a network server, but it is only used for your own data, with no other users having access to it. You will be the only one inputting data, and you will be responsible for packaging up your own data to submit. Other users may also have individual databases on the same server, but each person only sees their own data.

To set up an **individual** Epi Info database on a network server, follow the steps below:

1. Create a SQL Login (SQL user) with permission to create a database. This needs to be done for *each user* that will have an individual database on the server.
2. Follow the steps in the next section "**Installing the BBH SOC Version 2 Project Files in Epi Info**," but use the network SQL Server path and SQL login created above. This process should be repeated for each user.
3. This will create a .PRJ file for an individual user. Each user will get their own distinct version of the .PRJ file, which includes the path to their database, and their authentication information.

2.5 Installing the BBH SOC Version 2 Project Files in Epi Info

Once you have Epi Info and SQL Server Express installed, this section will guide you through setting up the project files that will allow you to enter data.

2.5.1 Create a Folder for SOC Epi Info Project Files

You will have to create a folder on your computer (or shared drive) to place the Epi Info project files.

- We suggest c:\SOC Epi Info V2.
- It is very important to note that this folder is different from the folder where you installed Epi Info in the section above “How to Install Epi Info”. When completing the steps in this section you must place files in a different folder from where you installed Epi Info earlier.

2.5.2 Downloading Project Files to the Folder You Created

After you created a folder for the project files as described in 2.3.1, download the project files from the BBH SOC web page:

1. Click the “**BBH SOC Epi Info Version 2 Project Files**” link to download the project files. The download file is in .zip format.
2. Once the file is downloaded, locate the file, and unzip (extract the file to your hard drive). To unzip, right click on the file and click “Extract All”.
3. When asked where to extract the files to, please select the folder that you created in the steps above “Create a Folder for SOC Epi Info Project Files” (c:\SOC Epi Info V2).

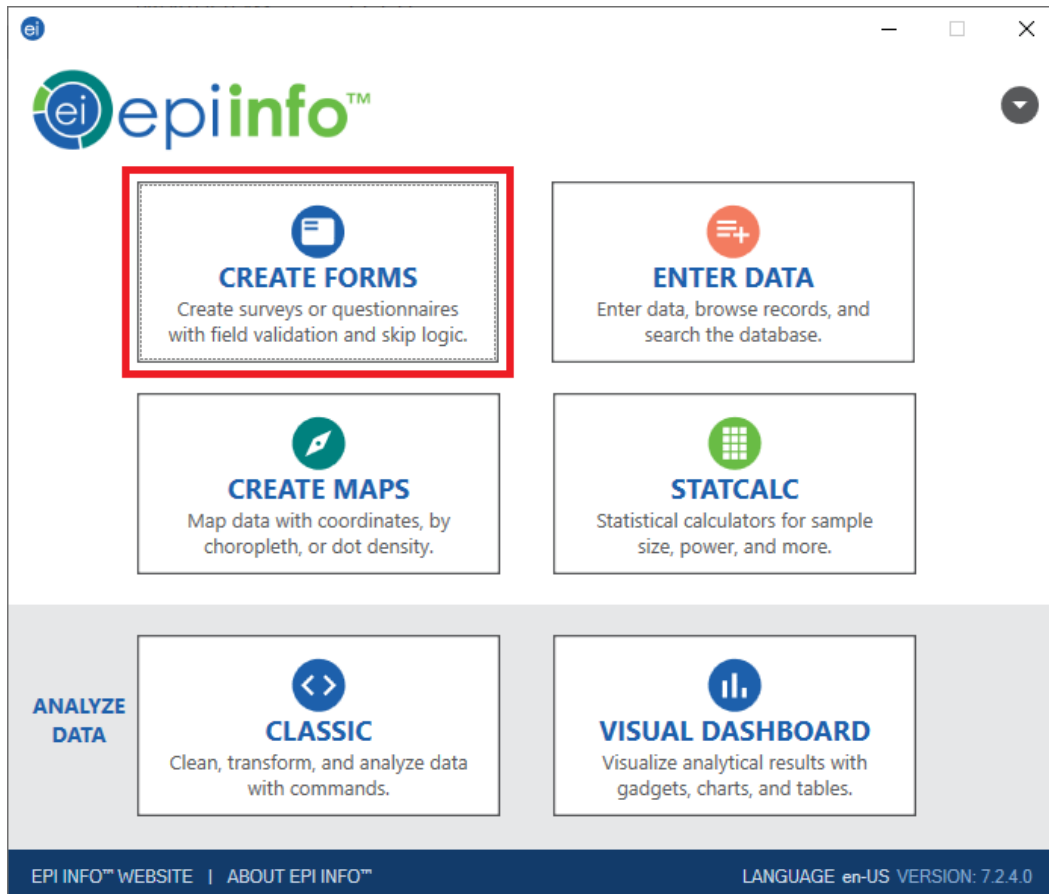
2.5.3 How to Install the BBH SOC Epi Info Project Files

The steps below will walk you through setting up the Epi Info forms that you will use for data entry.

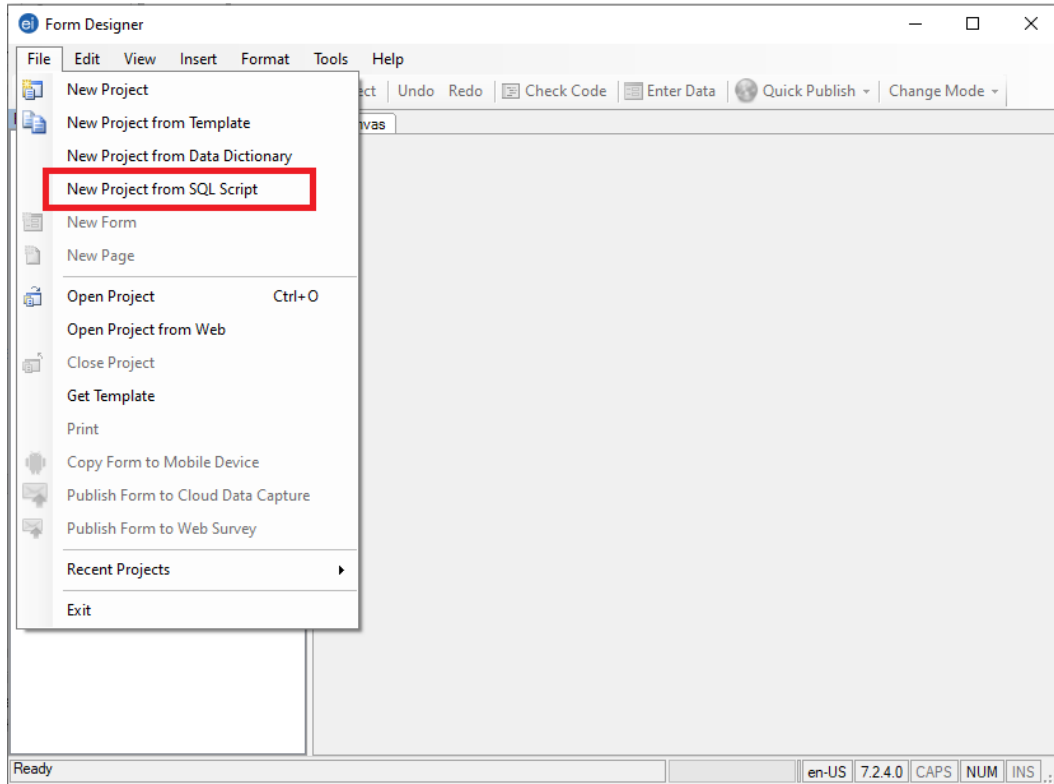
1. Open Epi Info. You will need to locate the Epi Info program that you installed in the “Installing Epi Info” section above. It may be the folder “C:\Epi info” or something similar. If you see the file “Launch Epi Info 7.exe”, double click on it to launch the software. You should then see the main Epi Info screen below.



2. Click on Create Forms



3. From the File Menu, click “New Project from SQL Script”. If you do not see this option under the File menu, then you do not have the correct version of the Epi Info software installed. Please refer to the section “Installing Epi Info” at the beginning of this document before returning to this step.



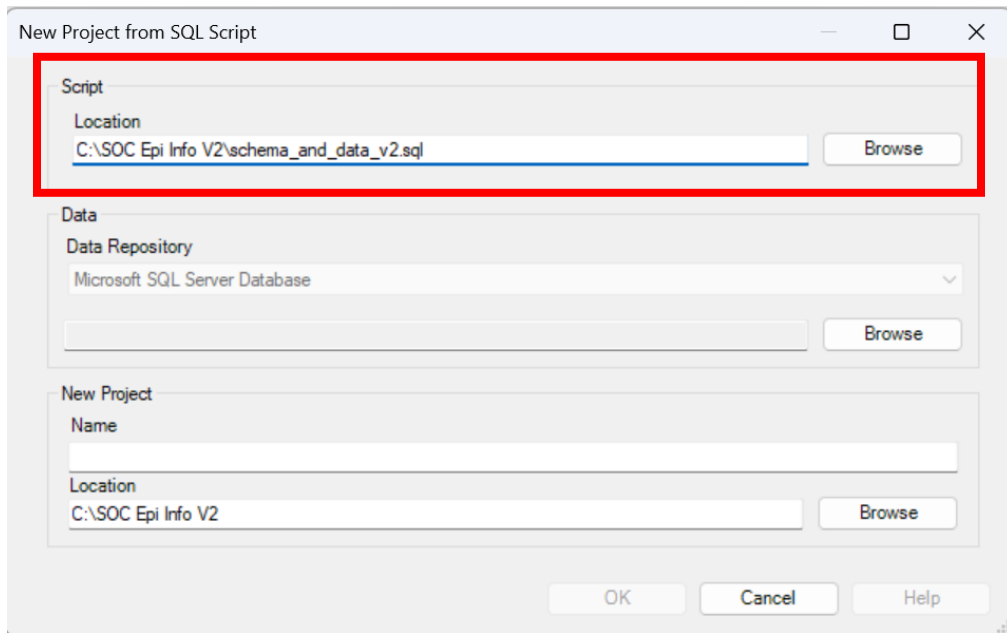
4. A popup box entitled “New Project from SQL Script” should appear.

The screenshot shows a Windows-style dialog box titled "New Project from SQL Script". It contains three main sections: "Script", "Data", and "New Project".

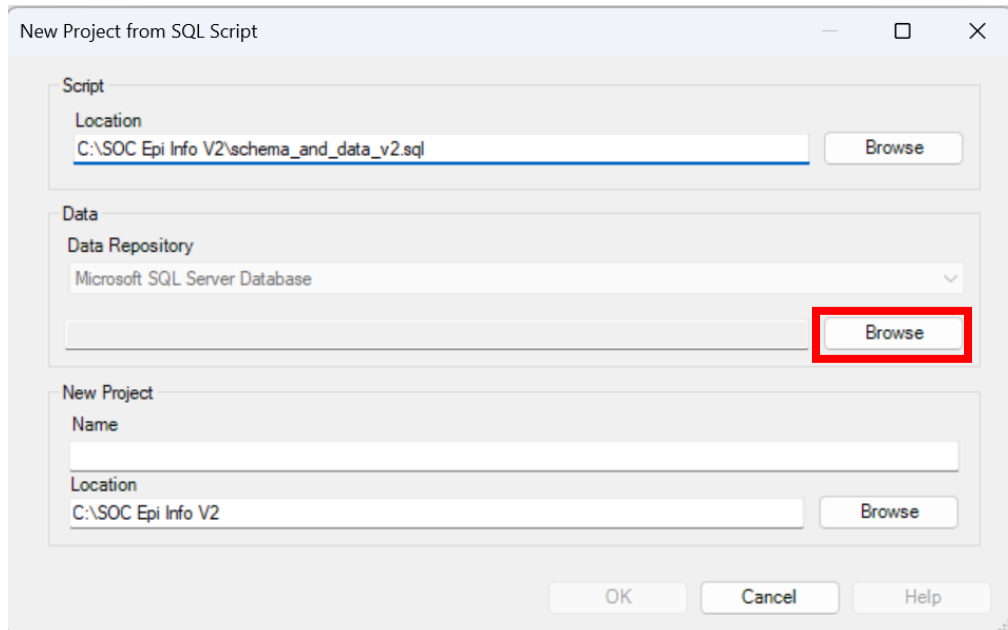
- Script Section:** Includes a "Location" text field and a "Browse" button.
- Data Section:** Includes a "Data Repository" dropdown menu currently set to "Microsoft SQL Server Database", an empty text field, and a "Browse" button.
- New Project Section:** Includes a "Name" text field, a "Location" text field containing the text "C:\SOC Epi Info V2", and a "Browse" button.

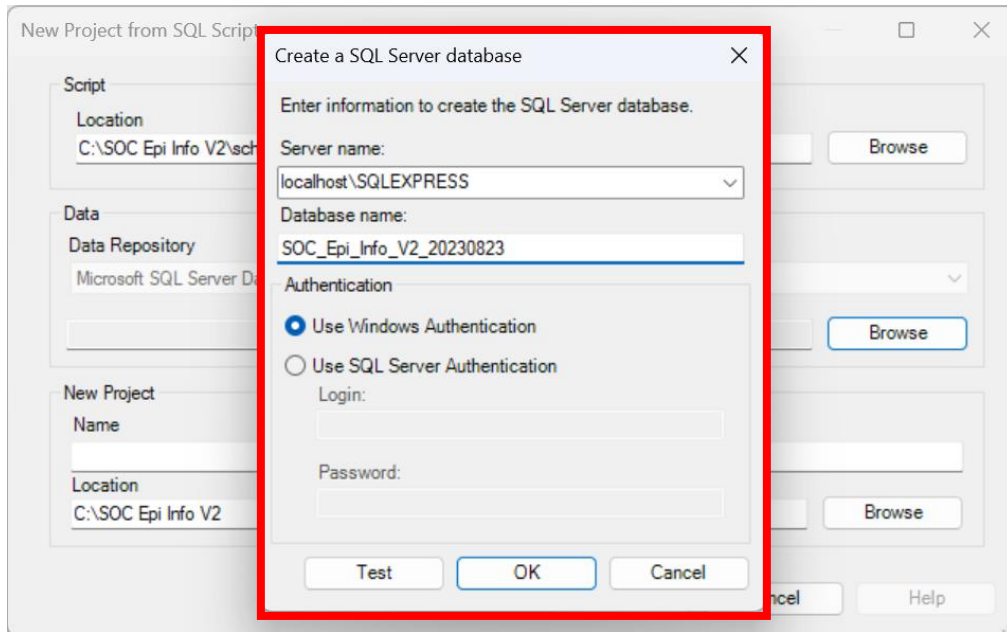
At the bottom of the dialog are three buttons: "OK", "Cancel", and "Help".

5. **Script** field: browse to the location where you saved the BBH SOC Project Files in the section “Create a Folder for SOC Epi Info Project Files” above this. Click to select the file schema_and_data.sql.



6. Data Repository Field: Click the “Browse” button. In the “Create a SQL Server database” pop-up, enter the following:
- Server Name: localhost\SQLEXPRESS
 - Database name: SOC_Epi_Info_V2_YYYYMMDD (where YYYYMMDD is the current year, month, and day – see sample screenshot below)
 - Select “Use Windows Authentication”
 - Click the “Test” button to make sure you have a valid connection to the database.
 - Click OK, to close the pop-up.





7. Once back at the “New Project from SQL Script” pop-up, in the “New Project” section...
 - a. Name: **SOC_Epi_Info_v2** (this is a suggestion – you can choose a different name, but it can only contain letters, numbers, or underscores)
 - b. Location: **c:\SOC Epi Info V2** (the folder you created in the steps above)
 - c. Note: this will create a *.prj file in this folder. Please remember this folder and file name – as it will be the one you use when starting to enter data (refer to user guide).

New Project from SQL Script

Script

Location
C:\SOC Epi Info V2\schema_and_data_v2.sql

Browse

Data

Data Repository
Microsoft SQL Server Database

Data Source=localhost\SQLEXPRESS;Initial Catalog=SOC_Epi_Info_V2_20230823;Integrated Ser

Browse

New Project

Name
SOC_Epi_Info_V2

Location
C:\SOC Epi Info V2

Browse

OK Cancel Help

8. Click “OK” again to close the pop-up. Epi Info will begin creating the project forms. This process should take between 5 and 15 seconds. Once it is complete, you should see the “BBH System of Care” page below.

Form Designer - [C:\SOC Epi Info Project V2\SOC_Epi_Info_V2.prj\WVSOCData\Page 1]

File Edit View Insert Format Tools Help

New Project Open Project Close Project Undo Redo Check Code Enter Data

Project Explorer

- SOC_Epi_Info_V2
 - WVSOCData
 - Page 1
 - SatisfactionData
 - ESMHTierData
 - EventData
 - ClientData
 - MonthlyClientData
 - ProgramRelatedDataSource
 - ReferralData
 - MCRSResponseData
 - Fields
 - Label/Title
 - Text (Uppercase)
 - Multiline
 - Number
 - Phone Number
 - Date
 - Time
 - Date/Time
 - Checkbox
 - Yes/No
 - Option
 - Command Button
 - Image
 - Mirror
 - Grid
 - Legal Values
 - Comment Legal
 - Codes
 - Relate
 - Group
 - Templates

WVSOCData\Page 1

Bureau for Behavioral Health's System of Care (BBH SOC)

Data Collection and Management System (Version 2.0)

User Guide

Welcome

Welcome to the Bureau for Behavioral Health's System of Care (BBH SOC) Data Collection and Management System. Within the Epi Info software, you will be able to add and edit records from forms within three areas: Client Records, Agency Events, and Additional Forms.

The forms in this data collection cover 11 programs within the BBH SOC: (1) Children's Mental Health Wraparound (CMHW), (2) Children's Mobile Crisis Response and Stabilization (MCRS), (3) Children's Expanded School Mental Health (ESMH), (4) Positive Behavior Support (PBS), (5) First Episode Psychosis (FEP), (6) Six Regional Youth Services Centers (RYSC), (7) Respite, (8) Regional Youth Intervention Specialist (RVIS), (9) System of Care Family Coordinator (SOCFC), (10) State Opioid Response Family Coordinator (SORFC), and (11) Drop in Center for Transitional Youth (DCTY).

Client Records

The Client form allows you to add and edit client's records and additional details needed for the System of Care's program(s) your agency covers for the clients. You will be able to:

- (1) Record pertinent information about the client,
- (2) Collect monthly information about the client, and
- (3) Track sessions of services provided to the client.

Select "Go to Client Form" to begin.

Go to Client Form

Agency Events

The Event form allows you to add and edit events across different programs.

This includes but not limited to:

- Trainings, Promotion/Outreach, Tier Prevention Activities, Cross-Planning Activities, and more.

Select "Go to Event Form" to begin.

Go to Event Form

Additional Forms

These are additional forms that allow you to add and edit information on referrals, feedback, surveys, and tier updates.

- Referrals and Calls Information
- Consumer Satisfaction Survey Summary
- Children's Expanded School Mental Health Tier Updates

Ready en-US 7.2.4.0 CAPS NUM INS

9. Congratulations – you have successfully installed all the required Epi Info components. Click the “X” at top right to close this window – and then refer to the User Guide for next steps on how to begin entering data.

3 Users Migrating from Version 1 to Version 2 of BBH SOC Epi Info

*****PLEASE NOTE: VERSION 1 DOES NOT HAVE TO BE REMOVED TO USE VERSION 2; HOWEVER IF VERSION 1 IS REMOVED VERSION 1 DATA STILL NEEDS TO BE ACCESSIBLE FOR RECORD RETENTION REQUIREMENTS. *****

3.1 Uninstalling BBH SOC Epi Info Version 1 Project Files

If you have previously installed a version of the Epi Info project forms, and need to install a new version, please follow the steps below to uninstall Version 1.

IMPORTANT: The steps below will not remove data but will remove access to the data through Epi Info. If you need to retain access to Version 1 data, please contact technical support before continuing.

1. Find the folder where you previously created the Epi Info SOC Project.
 - a. In the example above, this is the folder C:\SOC Epi Info Project, but it may be in a different location, depending on how you previously set this up.
2. The file you are looking for has a *.prj extension.
 - a. In the example above this file was created as "SOC_Epi_Info.prj", but yours may differ.
3. Delete the *.prj file.
4. You can now go back to the "How to Download SOC Data Project Files" section above to install the new version of the forms.

3.2 Installing the BBH SOC Epi Info Version 2 Project Files

3.2.1 Create a Folder for BBH SOC Epi Info Version 2 Project Files

You will have to create a folder on your computer (or shared drive) to place the Version 2 Epi Info project files.

- We suggest c:\SOC Epi Info V2 to ensure these files are separate from the original version of BBH SOC Epi Info.
- It is very important to note that this folder is different from the folder where Epi Info is installed on your computer. When completing the steps in this section you must place files in a different folder from where Epi Info is installed.

3.2.2 How/where to Download SOC Data Project Files?

Once you have located the download link on the BBH SOC web page, please follow these steps to download the project files:

1. Click the "**BBH SOC Epi Info Version 2 Project Files**" link to download the project files. The download file is in .zip format.
2. Once the file is downloaded, locate the file, and unzip (extract the file to your hard drive). To unzip, right click on the file and click "Extract All".

3. When asked where to extract the files to, please select the folder that you created in the steps above “Create a Folder for SOC Epi Info Project Files” (c:\SOC Epi Info V2).

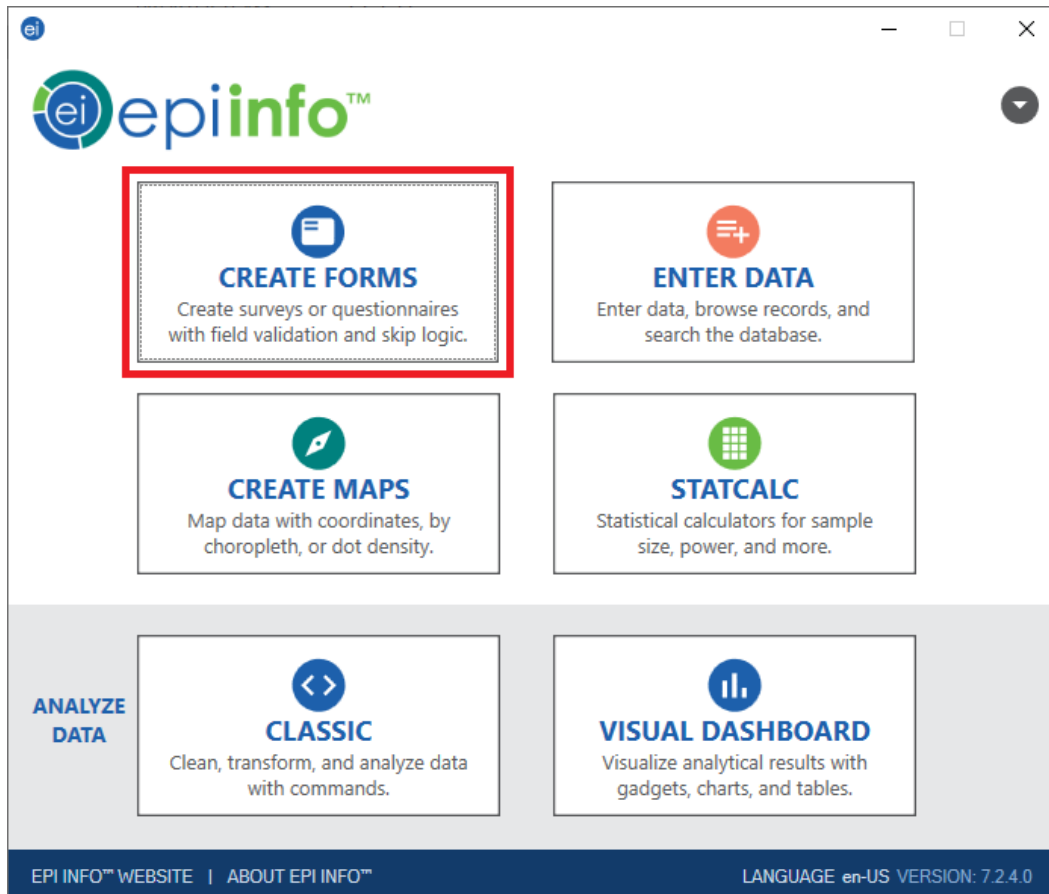
3.2.3 How to Install the BBH SOC Epi Info Project Files

The steps below will walk you through setting up the Epi Info forms that you will use for data entry.

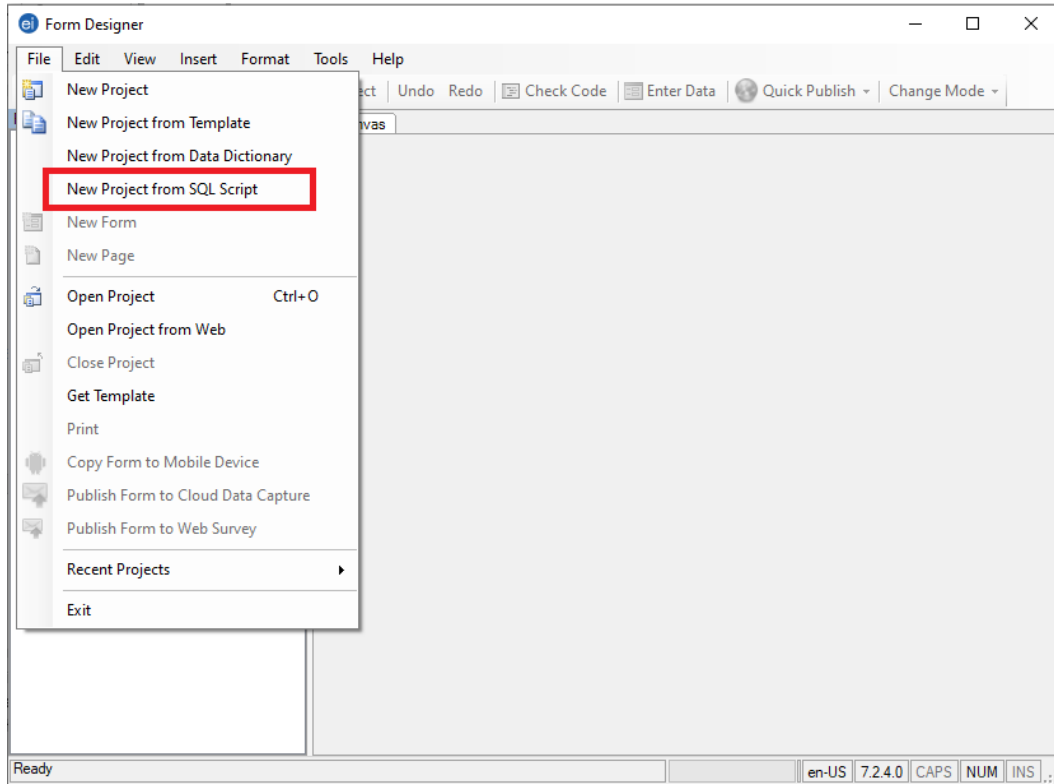
1. Open Epi Info. You will need to locate the Epi Info program that you installed in the “Installing Epi Info” section above. It may be the folder “C:\Epi info” or something similar. If you see the file “Launch Epi Info 7.exe”, double click on it to launch the software. You should then see the main Epi Info screen below.



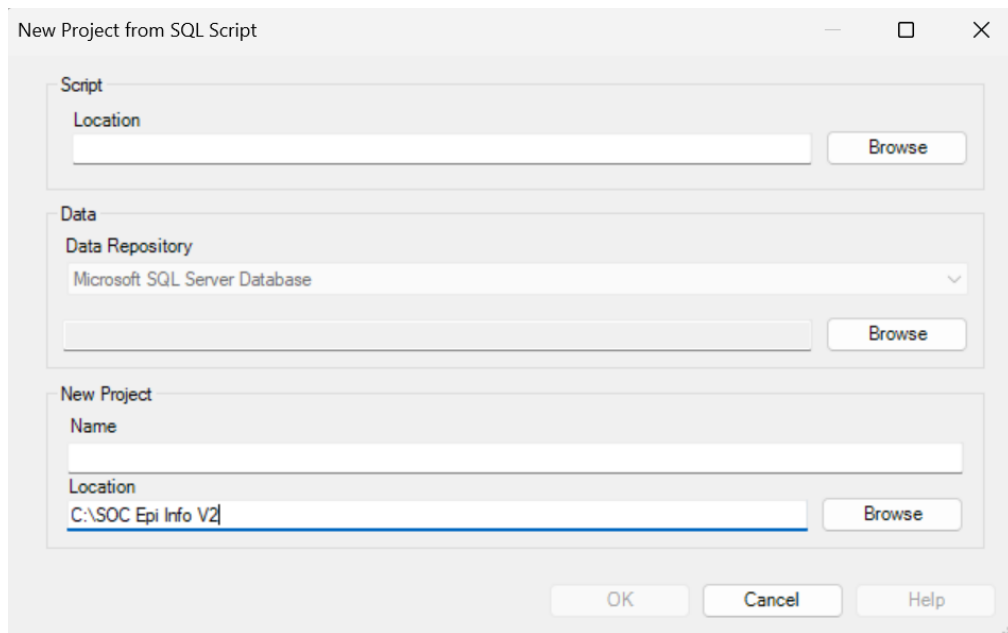
2. Click on Create Forms



3. From the File Menu, click “New Project from SQL Script”. If you do not see this option under the File menu, then you do not have the correct version of the Epi Info software installed. Please refer to the section “Installing Epi Info” at the beginning of this document before returning to this step.



4. A popup box entitled “New Project from SQL Script” should appear.



The screenshot shows a Windows-style dialog box titled "New Project from SQL Script". It contains three main sections: "Script", "Data", and "New Project".

- Script Section:** Includes a "Location" text field and a "Browse" button.
- Data Section:** Includes a "Data Repository" dropdown menu currently set to "Microsoft SQL Server Database", an empty text field, and a "Browse" button.
- New Project Section:** Includes a "Name" text field, a "Location" text field containing the text "C:\SOC Epi Info V2", and a "Browse" button.

At the bottom of the dialog are three buttons: "OK", "Cancel", and "Help".

5. **Script** field: browse to the location where you saved the BBH SOC Project Files in the section “Create a Folder for SOC Epi Info Project Files” above this. Click to select the file schema_and_data.sql.

New Project from SQL Script

Script

Location
C:\SOC Epi Info V2\schema_and_data_v2.sql

Data

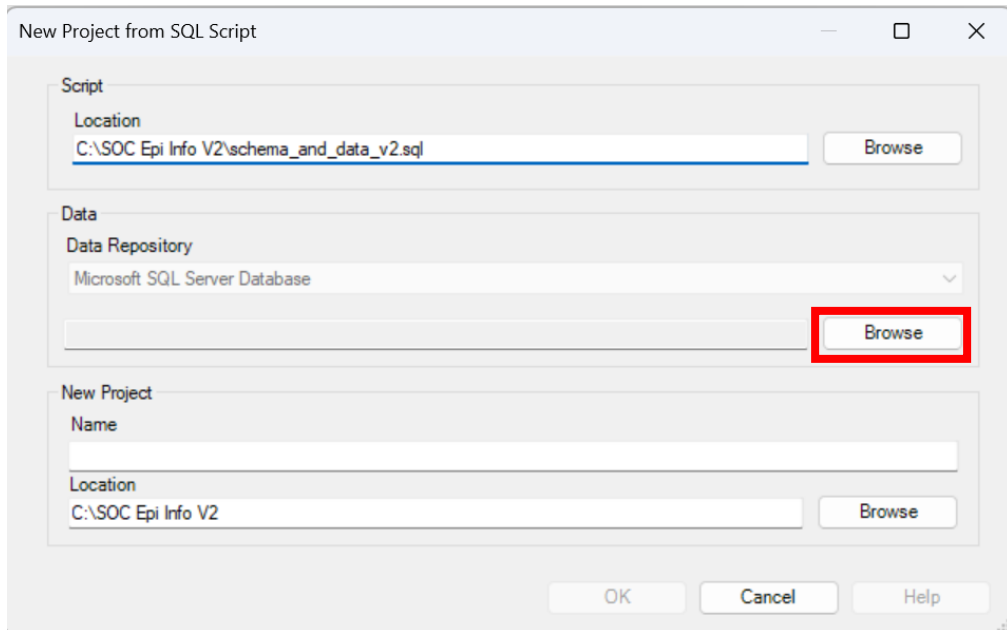
Data Repository
Microsoft SQL Server Database

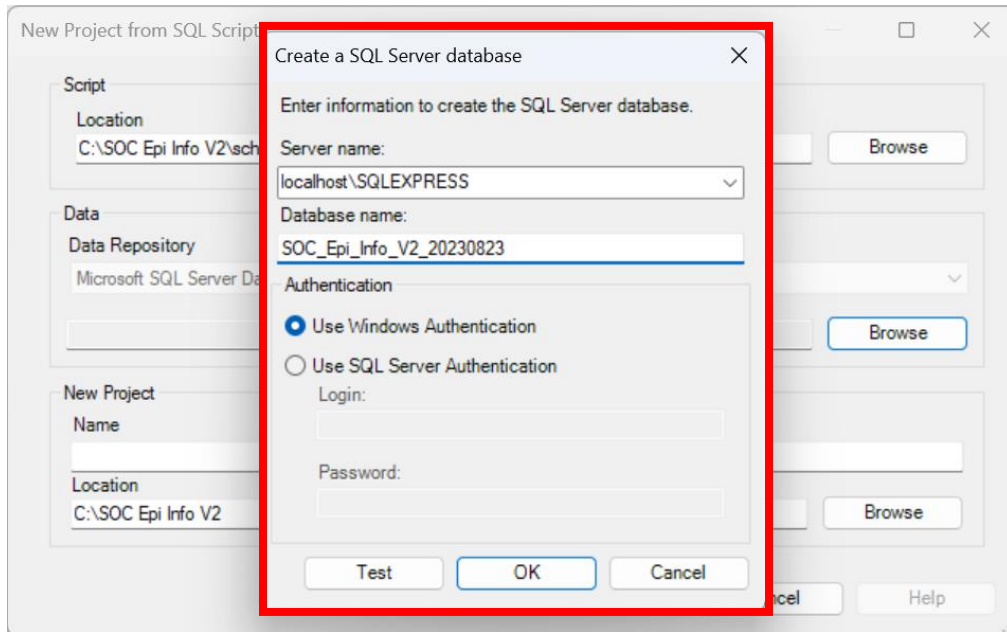
New Project

Name

Location
C:\SOC Epi Info V2

6. Data Repository Field: Click the “Browse” button. In the “Create a SQL Server database” pop-up, enter the following:
- Server Name: localhost\SQLEXPRESS
 - Database name: SOC_Epi_Info_V2_YYYYMMDD (where YYYYMMDD is the current year, month, and day – see sample screenshot below)
 - Select “Use Windows Authentication”
 - Click the “Test” button to make sure you have a valid connection to the database.
 - Click OK, to close the pop-up.





7. Once back at the “New Project from SQL Script” pop-up, in the “New Project” section...
 - a. Name: **SOC_Epi_Info_v2** (this is a suggestion – you can choose a different name, but it can only contain letters, numbers, or underscores)
 - b. Location: **c:\SOC Epi Info V2** (the folder you created in the steps above)
 - c. Note: this will create a *.prj file in this folder. Please remember this folder and file name – as it will be the one you use when starting to enter data (refer to user guide).

New Project from SQL Script

Script

Location
C:\SOC Epi Info V2\schema_and_data_v2.sql

Data

Data Repository
Microsoft SQL Server Database

Data Source=localhost\SQLEXPRESS;Initial Catalog=SOC_Epi_Info_V2_20230823;Integrated Ser

New Project

Name
SOC_Epi_Info_V2

Location
C:\SOC Epi Info V2

8. Click “OK” again to close the pop-up. Epi Info will begin creating the project forms. This process should take between 5 and 15 seconds. Once it is complete, you should see the “BBH System of Care” page below.

9. Congratulations - you have successfully installed all the required Epi Info components for BBH SOC Epi Info Version 2. Click the “X” at top right to close this window. **If your organization plans on using the Data Migration tool to migrate data from Version 1 to Version 2, follow the instructions in the next section.**

Click the “X” at top right to close this window.

3.3 Migrate Data from Version 1 to Version 2

*****PLEASE NOTE, IF YOUR AGENCY DID NOT COMPLETE A TYPICAL INSTALLATION OF THE EPI INFO APPLICATION ON THE LOCAL COMPUTER THE MIGRATION TOOL IS NOT RECOMMENDED*****

Please Install the version 2 database and install before completing this section.

3.3.1 What Is the Migration Tool?

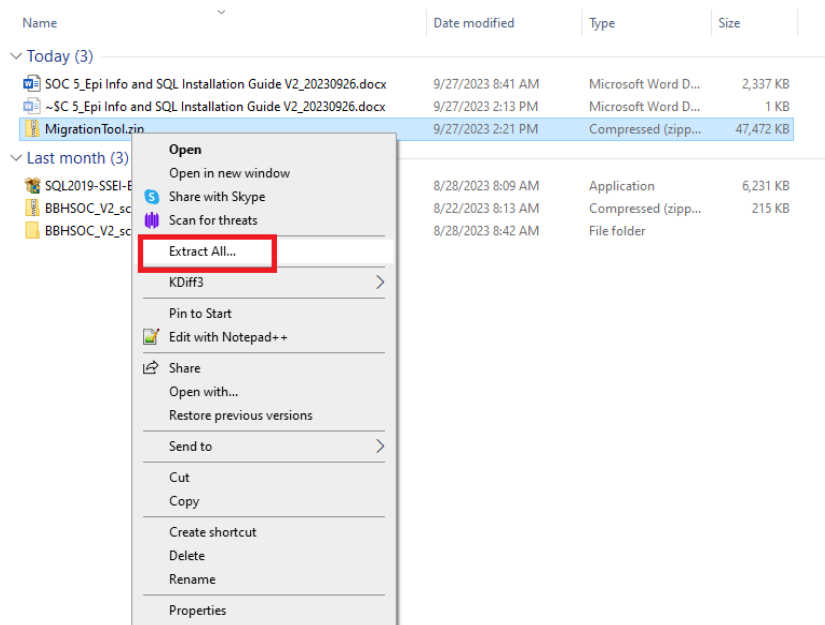
This tool is used to migrate data from BBHSOC Epi Info Version 1 to BBHSOC Epi Info Version 2.

3.3.2 Where to Download the Migration Tool?






















Please use the link located on the **BBH SOC web page** (<https://dhr.wv.gov/BBH/data/Pages/Epi-Info.aspx>)

3.3.3 How to Install and use the Migration Tool?

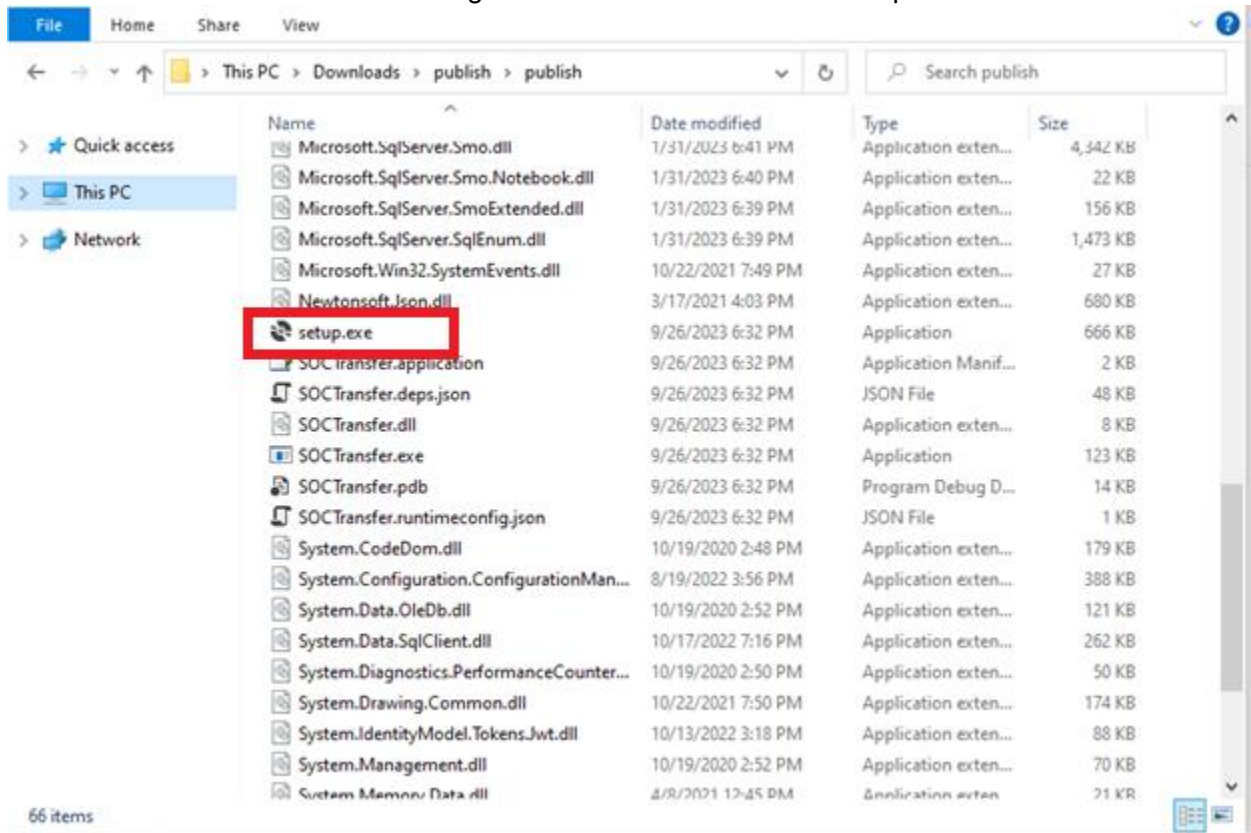
1. Once the file “MigrationTool.zip” is downloaded, extract it.



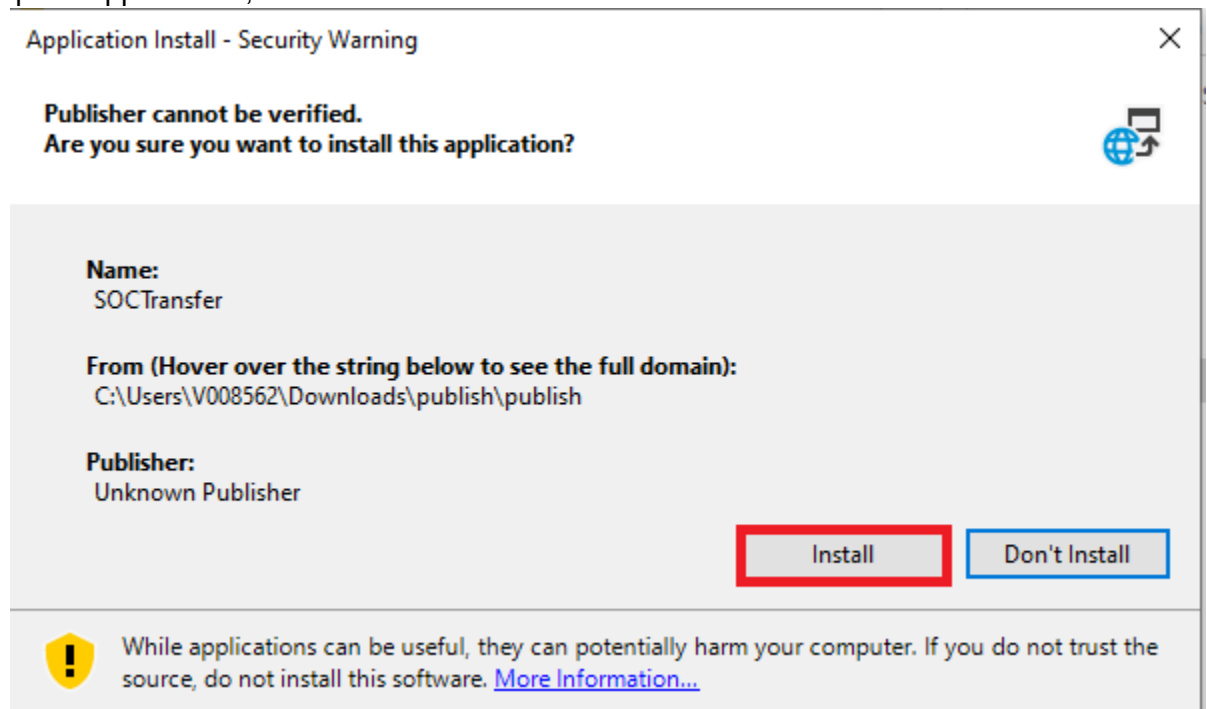
2. Open the file and drag the “SOCMigrationLog.log” file and drop it in the C:\ Drive.

| Name | Date modified | Type | Size |
|--|--------------------|----------------------|----------|
|  Microsoft.SqlServer.ServiceBrokerEnum.dll | 1/31/2023 6:40 PM | Application exten... | 36 KB |
|  Microsoft.SqlServer.Smo.dll | 1/31/2023 6:41 PM | Application exten... | 4,342 KB |
|  Microsoft.SqlServer.Smo.Notebook.dll | 1/31/2023 6:40 PM | Application exten... | 22 KB |
|  Microsoft.SqlServer.SmoExtended.dll | 1/31/2023 6:39 PM | Application exten... | 156 KB |
|  Microsoft.SqlServer.SqlEnum.dll | 1/31/2023 6:39 PM | Application exten... | 1,473 KB |
|  Microsoft.Win32.SystemEvents.dll | 10/22/2021 7:49 PM | Application exten... | 27 KB |
|  Newtonsoft.Json.dll | 3/17/2021 4:03 PM | Application exten... | 680 KB |
|  setup.exe | 9/27/2023 2:18 PM | Application | 666 KB |
|  SOCMigrationLog.log | 9/27/2023 2:16 PM | Text Document | 1 KB |
|  SOCTransfer.application | 9/27/2023 2:18 PM | Application Manif... | 2 KB |
|  SOCTransfer.deps.json | 9/27/2023 2:18 PM | JSON File | 48 KB |
|  SOCTransfer.dll | 9/27/2023 2:18 PM | Application exten... | 8 KB |
|  SOCTransfer.exe | 9/27/2023 2:18 PM | Application | 123 KB |
|  SOCTransfer.pdb | 9/27/2023 2:18 PM | Program Debug D... | 14 KB |
|  SOCTransfer.runtimeconfig.json | 9/27/2023 2:18 PM | JSON File | 1 KB |
|  System.CodeDom.dll | 10/19/2020 2:48 PM | Application exten... | 179 KB |
|  System.Configuration.ConfigurationMan... | 8/19/2022 3:56 PM | Application exten... | 388 KB |
|  System.Data.OleDb.dll | 10/19/2020 2:52 PM | Application exten... | 121 KB |
|  System.Data.SqlClient.dll | 10/17/2022 7:16 PM | Application exten... | 262 KB |
|  System.Diagnostics.PerformanceCounter... | 10/19/2020 2:50 PM | Application exten... | 50 KB |
|  System.Drawing.Common.dll | 10/22/2021 7:50 PM | Application exten... | 174 KB |

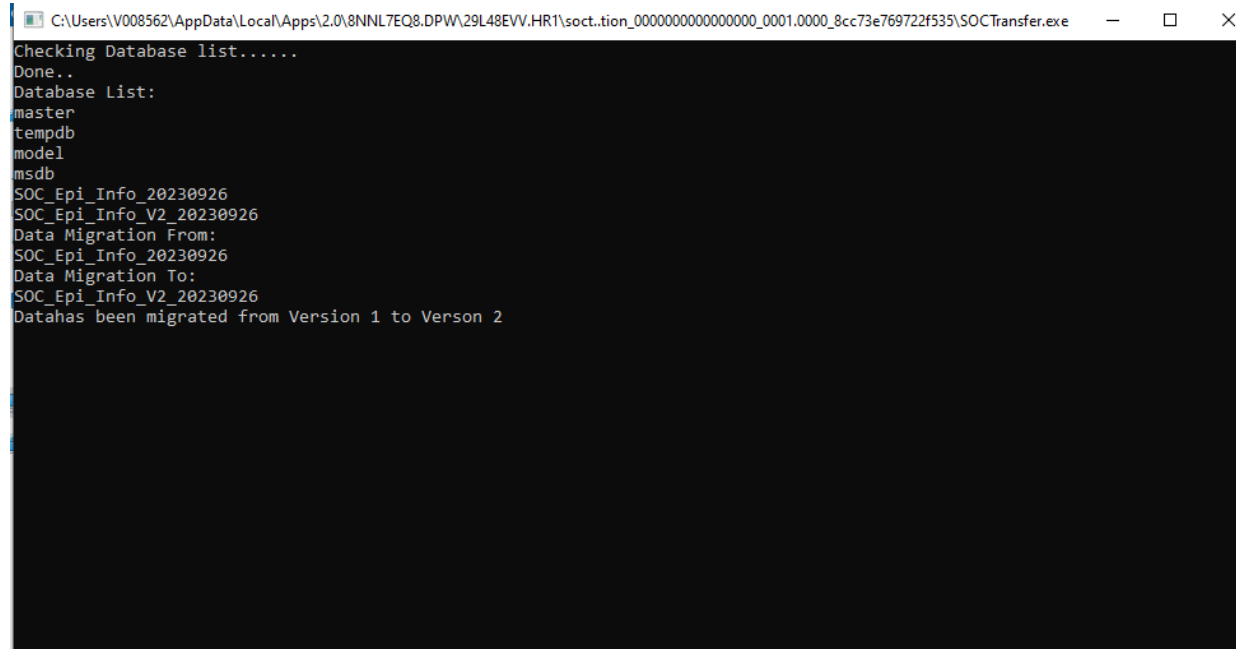
3. Once the file is extracted and the log moved to C:\ drive run the setup.exe.



4. A pop up will appear click, "Install".

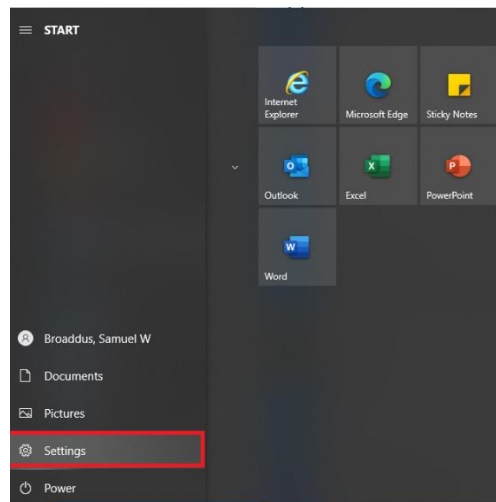


5. The tool will Install and run. Once you see this screen, if you have seen the last line as “Data has been migrated from Version 1 to Version 2.” The migration has completed. Press any key to continue. If you see an error message, go to the error help section of this document.

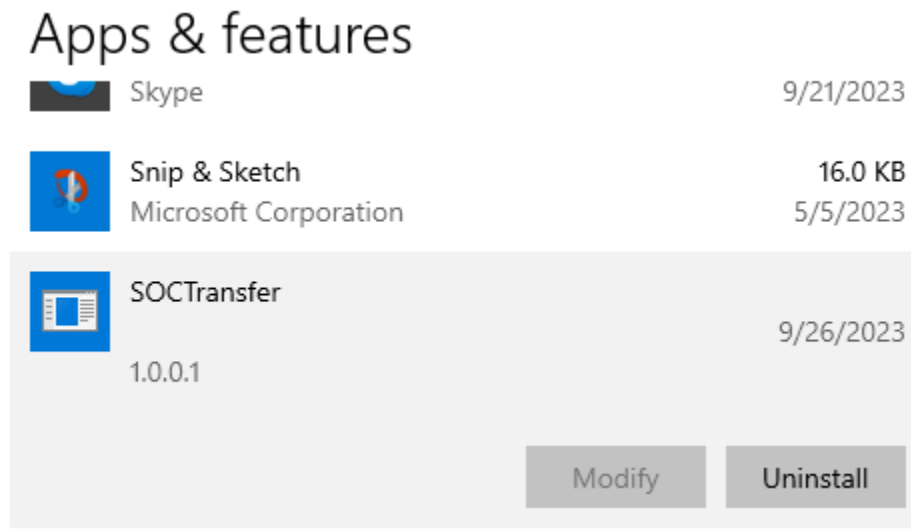


```
C:\Users\V008562\AppData\Local\Apps\2.0\8NNL7EQ8.DPW\29L48EVV.HR1\soc.tion_0000000000000000_0001.0000_8cc73e769722f535\SOCTransfer.exe
Checking Database list.....
Done..
Database List:
master
tempdb
model
msdb
SOC_Epi_Info_20230926
SOC_Epi_Info_V2_20230926
Data Migration From:
SOC_Epi_Info_20230926
Data Migration To:
SOC_Epi_Info_V2_20230926
Data has been migrated from Version 1 to Version 2
```

6. If the migration was success, uninstall the migration tool. Click to the start menu. Click the settings menu.

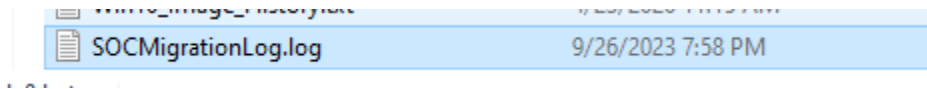


7. When the window opens, scroll to the SOCTransfer program, and uninstall it.



3.3.4 Error Help

- 1 If an error occurs, email samuel.w.broaddus@wv.gov. Please attach the log file to the email so that a solution can be found.
- 2 The log file is located C:\SOCMigrationLog.log



Backup Considerations

Please note that if you have installed and are working with these software applications locally versus in a networked shared environment, the data you enter will only be present on that workstation. This means that if your workstation were to fail and become unrecoverable, you could lose your data.

Considerations for backup of data:

1. When you package your data for submission (refer to User Guide), the files you create contain all the data in Epi Info. Consider storing these files or backing them up to an alternate location. It is very important to note that these files may contain sensitive information (PII/PHI), so this alternate location must be secure. Refer to your organization's IT support team for guidance.
2. When you submit your data to BBH via secure FTP, BBH will retain these submitted files for up to 6 months. These files can be used to rebuild your local database in case of a system failure.

Do not store Epi Info data on personally owned computers. This data should only be stored on computers owned and maintained by your organization.

If you must share your data with someone else in your organization prior to submission to BBH, use the password protection option when creating the data package. You will need to share that password with the recipient so that they can then import the package into their Epi Info instance. Refer to the User Guide for detailed information on this functionality.