



# **Version 4.0 Users Manual**



# Users Manual

**SNAP! dcs Version 4.0**

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*SNAP! dcs is a handheld data collection system.*

*This manual covers the primary points of what all the features are for and how to use them.*

# **SNAP! dcs 4.0 Users Manual**

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# 1 Introduction and Overview

SNAP! dcs is a handheld data collection system designed to make any typical field data collection form available in an electronic format on an MS Windows Mobile device.

**There are two parts to SNAP!:**

- SNAP! Client: desktop software that stores card templates and makes them available to a mobile device. Cards and corresponding data collected on the mobile device are imported to the desktop for storage, viewing, editing, analyzing, and printing.
- SNAP! Mobile: users load forms onto a MS Windows Mobile device from SNAP! Client. Data is collected and stored on the handheld, then exported to the Client.

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## 2 Getting Started

Setting up SNAP! involves the following steps:

1. Installing the desktop software
2. Installing the handheld software
3. Importing card templates to the desktop
4. Sending the card templates to the handheld

### 2.1 Minimum System Requirements

#### Desktop Requirements:

- .NET Framework 3.5 (found at [www.microsoft.com/downloads](http://www.microsoft.com/downloads))
- Intel® Pentium® processor 400 MHz minimum (1GHz recommended)
- Windows XP or newer, Windows Server 2003 or 2008
- 96MB RAM minimum (256MB RAM recommended)
- Up to 500MB hard drive space may be required
- Microsoft ActiveSync or Windows Mobile Device Center
- Microsoft Excel (to run reports)

#### Handheld Requirements:

- .NET Compact Framework 3.5 (found at [www.microsoft.com/downloads](http://www.microsoft.com/downloads))
- Windows CE or Windows Mobile

### 2.2 Installing / Upgrading SNAP!

#### Initial installation:

1. **Microsoft ActiveSync or Windows Mobile Device Center must be installed to connect your handheld to your PC.**

Windows Mobile Device Center for Windows Mobile (2003 or later) devices and Windows Vista or Windows 7:

<http://www.microsoft.com/windowsmobile/en-us/downloads/microsoft/device-center-download.mspix>

Microsoft ActiveSync for Windows CE or Mobile devices and Windows XP or earlier:

<http://www.microsoft.com/downloads/details.aspx?displaylang=en&FamilyID=7269173a-28bf-4cac-a682-58d3233efb4c>

Microsoft ActiveSync for Windows Mobile (2003 or later) devices and Windows XP or earlier:

<http://www.microsoft.com/windowsmobile/en-us/downloads/microsoft/activesync-download.mspix>

2. **.NET Framework 3.5 must be installed on the desktop:**

<http://www.microsoft.com/downloads/details.aspx?FamilyId=333325FD-AE52-4E35-B531-508D977D32A6&displaylang=en>

3. **.NET Compact Framework 3.5 must be installed on the handheld (connect handheld to PC prior to downloading):**

<http://www.microsoft.com/downloads/details.aspx?familyid=e3821449-3c6b-42f1-9fd9-0041345b3385&displaylang=en>

#### SNAP! Client installation / upgrading on PC:

1. Run the installer and follow the on-screen instructions from <http://www.jrpltd.com/Support/Updates.aspx?Product=SNAP>.

2. If this is the initial installation, run SNAP Client and register the program by entering your Registration Code. The PC must be connected to the internet in order to register. You will not be able to unregister a PC once registered, so please ensure you register the correct PC.

#### **SNAP! Mobile installation / upgrading on a Windows Mobile or CE handheld device:**

1. Install SNAP! Client on the PC first.
2. For new installations, go to <http://www.jrpltd.com/Support/Updates.aspx?Product=SNAP> and download the 'Download Version for Mobile Device'. This will download a .CAB file.
3. Ensure that your mobile device is connected and synchronized with your desktop.
4. Locate the downloaded SnapMobileSetup.CAB file on your computer, copy it, and paste it into the main directory of your mobile device (not the storage card).
5. On the mobile device itself, locate the SnapMobileSetup.CAB file and select it. This will install SNAP onto your handheld.
6. For upgrades, open SNAP! on the desktop and choose 'Synchronize Mobile Device' from the Options menu.
7. From the bottom left-hand corner, select the **Install To Mobile Device button** and follow the prompts on the mobile device.
8. You can now access SNAP! from your handheld by either going to the Programs menu or directly off the Start menu.
9. To load card templates onto your handheld, review '[Loading Card Templates](#)'.

**\*\* Note:** *Card templates and cards are stored in the installation location by default. If you wish to store them elsewhere, you can specify a different location in the `sharedfolder.txt` document in the SnapClient installation folder (generally under `C:\Program Files\JRP Solutions`).*

## 2.3 SNAP! Terminology

**Template** – the format for entering and reporting data; a particular type of card


**Theme** – a user-customized template for entering and reporting data

**Cards** – the container for some data collected; a card created using a template

**Data** – all data in the database or card

## 2.4 Data Types

There can be several different types of data entry fields available on each card type:

- **Checkbox** - check the box if applicable (boolean field)
- **Date** – drop down calendar to select date
- **Fixed Drop Down** – select from a pull down list of codes, no manual entry
- **Floating Point** – decimal number field, indicated in green
- **Formula** – automatically calculated field
- **Free Text Drop Down** – select from a pull down list of codes or manual entry
- **General Text** – manual entry text
- **Integer** – whole number field, indicated in blue
- **Label** – displays a heading without the option to collect data
- **Multi Select** – select multiple options from a list
- **Tally** - select ▲ or ▼ buttons to increase or decrease the count (cannot go below zero), shown in green
- **Calculated** - not a data entry field, shown in green
- **Y N NA NC** – checklist, select Y / N / na / X (clear) – can use keyboard 'y', 'n', 'x', 'c' or mouse
- **Comments, Sketch, Voice Clips, Attachments, GPS** – select the  beside the field name to enter comments, draw a sketch, record an audio clip, add attachments, or to set GPS coordinates (if connected)
- **Mandatory** – any mandatory fields are in yellow

- 
- **Information / Help** – select the  beside the field name for more information

**Part**



## 3 Using SNAP!

SNAP! Client is desktop software that stores [card templates](#) and their themes and makes them available to a mobile device. Cards and corresponding data collected on the mobile device are imported to the desktop for storage, viewing, editing, analyzing, and printing.

### 3.1 Card Templates and Themes

Templates are the blank forms for collecting data. While JRP Solutions builds the initial card templates, users can edit some parts of the templates to create themes and then share these with other users. This is very useful when different codes are needed in the code lists, or different terminology is used.

To edit a template, you must have it selected, then choose the Themes menu and 'Create a new [template name] Theme based on the Default Template'. If you have a theme already selected, you can create another theme based on it. Once a theme has been created, it cannot be edited. Old themes can be deleted if selected first. This is to prevent shared themes from becoming different between users.

Templates and themes are distributed by exporting and importing .SnapPkg files. They are loaded onto SNAP! Client where they can be sent to SNAP! Mobile for data collection in the field.

To select a card template or theme on the desktop, use the **Change Template button**. On the mobile device, use the Current Template pull down list to select the template or theme.

The following fields can be edited to create a theme:

- **Section** - the Text, Fill, and Border colors for the Header Text (on the desktop only) can be edited
- **Long Name** – the field name that appears when using the Cards tab on the desktop
- **Short Name** – the field name that appears on the handheld and the Analysis tab on the desktop
- **Required on Handheld** – select if this field is mandatory
- **Users Can Set Default Value on Handheld** – means users can provide default data on the handheld that will be used on every new card created
- **Help Text** – provides extra information to users on the handheld
- **Code List** – lets you edit and reorder the codes available in a pull down list

#### 3.1.1 Loading Templates / Themes onto SNAP! Client

**To load card templates and themes onto the desktop:**

1. In SNAP! Client, select 'Import > from SNAP Data Package' from the File menu
2. Navigate to the appropriate .SnapPkg file(s) that you received from JRP Solutions or another user and 'Open'
3. The default card template or theme will be copied into the Template list

#### 3.1.2 Loading Templates / Themes onto SNAP! Mobile

**To load card templates onto a handheld:**

1. Ensure your MS Windows Mobile device is connected to your computer
2. Select the template on the desktop that you wish to send to the mobile device
3. In SNAP! Client, select 'Manage Data on Mobile Device' from the Mobile Device menu
4. Under the Templates section, select the template and/or themes you would like to add to the handheld (a checkbox will appear under 'After' beside the template and/or themes you wish to copy to the handheld, and the Action will change to 'Add')
5. Select the **Go button**

6. In SNAP! on the handheld, select the **Reload button** in the bottom right-hand corner of the screen to see the new template and/or themes

## 3.2 Cards (Data)

Cards are created from templates and are used to store field data. Cards can be transferred between the desktop and the handheld. They can be analyzed, printed, and exported to MS Excel.

### 3.2.1 Loading Cards to SNAP! Client

There are two options for importing cards under the File > Import menu:

1. from Excel sheet - allows users to specify an import from an Excel spreadsheet
2. from SNAP Data Package - users can import cards contained within a [data package](#) created from SNAP! 3.0 and newer

### 3.2.2 Exporting Cards from SNAP! Client

To export cards, use the 'Export Cards as Snap Package' option from the File > Export menu. Select the cards to be exported and choose 'OK'. Data can be exchanged between users with this method.

To export to MS Excel, use the Excel options under the File > Export menu.

### 3.2.3 Loading Cards to SNAP! Mobile

**To send cards to the mobile device:**

1. Select the template or theme that contains the cards you wish to send to the handheld
2. Using SNAP! Client, select 'Manage Data on Mobile Device' from the Mobile Device menu
3. In the 'Cards' section, select the card(s) you wish to add to the mobile device (they will highlight in green) and select the **Go button**
4. The selected card(s) will now appear on the mobile device where they can be edited and sent back to the desktop

**Sharing cards with other mobile devices:**

You can share cards with other MS Windows Mobile device users if you have Bluetooth enabled handhelds:

1. Ensure the receiving handheld has the same card template loaded onto it.
2. On the receiving handheld, with the card template selected, go to 'Options... [Card Name]... Receive [Card Name] Cards'.
3. On the sending handheld, with the card selected, go to 'Options... Card:xxx... Send...'


### 3.2.4 Importing Cards from SNAP! Mobile

Every time SNAP! Client is opened while a handheld is connected, it opens up an 'Import Data From Mobile Device' window. This window is also opened if a handheld is connected once SNAP! Client is already open. To open this window manually, select it from the Mobile Device menu on the desktop.

'Import Data From Mobile Device' will automatically import any new cards created on the handheld, and allow the user to merge any matching cards onto the desktop. Any changes made on the handheld will be reflected on the desktop, however, any changes made on the desktop will be overwritten by the handheld. For this reason, it is important to remove completed cards from the handheld.




**\*\* Note:** *If you delete any sections from a card on the handheld, they will still exist on SNAP! Client even after syncing. You will need to delete the sections from the card on SNAP! Client or delete the entire card from the desktop before syncing it from the handheld.*

### 3.2.5 Creating, Editing and Viewing Cards on SNAP! Client



Use the **Filter button**  to find a card or group of cards to view. You can sort the cards for easier viewing. If there are filters that you use repeatedly, create a favorite for quicker filtering. The **Filter button** will turn green when a filter is applied.

You can group cards by selecting any field from the main card section. This will change the way the cards appear in the navigation tree on the left.





#### To create new cards (data):

1. Select a theme or template using the **Change Template button**.
2. Select 'New Card' from the Edit menu or use the  **New Card button**.
3. If you already have a card you would like to clone, select it and choose 'Clone' from the Edit menu.
4. Give the new card a name.
5. Fill in the data fields on the right-hand side of the screen.
6. To add comments or attachments, right-click a field and 'View Additional Information'. If additional information already exists, the field will be shaded.
7. You can make the card appear smaller or larger by selecting 'Zoom' from the Options menu or use the  **Zoom button**.
8. Hide sections by deselecting them in Display Options under the Options menu or use the  **Display Options button**.

#### To create new sections:


1. Sections that can have multiple records added are called repeatable sections.
2. To add new sections, use the Section View tab.
3. After choosing a repeatable section, select the  **Add New button** that appears above the card.
4. Fill in the data.
5. To delete a section, select it and use the  **Delete button**.




#### To view / edit cards:

1. Select the card template you wish to use.
2. Select the specific card you want to view.
3. This will show you all the data in an editable format under the main Cards tab.
4. If you wish to rename the card, use the Edit menu and choose 'Rename' or use the  **Rename button**.
5. You may see some highlighted fields which indicate that there is additional information (comment, voice clip, attachment, or sketch) for that field. You can right-click the field and select 'View Additional Information', or use the tabs along the top of the card to view all of the additional information contained in the card.
6. Export data to Excel by using the  **Excel button** or File > Export menu.
7. Refresh the data by using the  **Refresh button**.
8. If you need to move individual repeatable sections to another parent section, select the section to be moved using the Section View, choose the  **Move To button**, and select the new section from the drop down list.

### 3.2.6 Analyzing Card Data

Use the Analysis tab for compiling card data:

- Select multiple cards from the list down the left hand side
- Use  Display Options to select the sections and fields to compile, the number of columns to freeze for scrolling, the column header height, and whether or not you wish to see statistical calculations

- Use the  **Run Report button** to see a summary of the data
- Use the  **Chart Data button** to see the data represented in either a bar or scatter chart
- Use the  **Excel button** to export the resulting data to MS Excel
- Use the Statistics tab on the bottom of the screen to show a statistics sheet (SNAP! automatically calculates a Count, Sum, Min, Max, Mean, Confidence Interval (90), and Standard Deviation on the data)


### 3.2.7 Merging Cards

On the handheld, or on the desktop, you can merge cards together (ie. Card 1 => Card 2). This will take the fixed data from the first card and update the second card, it will append any repeatable sections to second card, the second card will keep its name, and the first card will be deleted.

#### On the handheld:

- at the Current Template screen, choose the first card you want to merge, then Options > Card: name > Merge into > and choose the destination card.

#### On the desktop:

- click and drag the first card you want to merge onto the destination card, or
- use the  **Merge Cards button** and select the source and destination cards

### 3.2.8 Printing Cards



There are several options for printing data under the File menu:



- **Print** – prints the currently selected card
- **Preview** – shows you a sample of what the printout will look like
- **Print Multiple Cards** – allows you to print multiple cards at once
- **Page Setup** – allows you to set page size and orientation, printer, margins, etc.

### 3.2.9 Creating, Editing and Viewing Cards on SNAP! Mobile

SNAP! Mobile includes several buttons that allow you to navigate the sections easily: Edit, New, Grid, Drill, and Up. These functions and more are also found under the Options menu in the bottom left corner.

#### To create, edit and view cards (data):

1. Select the Template or Theme you wish to use from the pull down list under 'Current Template'.
2. Select the  box beside '<CREATE NEW>' to create a new card, or an existing card name to edit. A new card's name is defaulted to the template name with '(New)' at the end. You can edit this to something more recognizable to distinguish it from other cards.
3. The **Edit button** allows you to enter or view data within the current section or card.
4. The **Drill button** and the  box allow you to see the section(s) within the current section, going further into the card.
5. The **Up button** moves you back up to the parent section.
6. The **New button** allows you to create a new repeatable section.
7. Where the **Grid button** is available, you can enter and/or view data in a grid as an option. The columns are resizeable and have hover descriptions.
8. Any sections that are repeatable can also be deleted using Options menu.
9. Some fields may have minimum and/or maximum values set. If the number you have entered falls outside this range, you will receive a message upon pressing 'Done' to exit the screen.
10. Some fields are calculated as you enter data into related fields.
11. Fields that are mandatory are in bold and highlighted. If you have not filled them in, you will be notified upon selecting 'Done'.

12. For date fields, you can use the drop down calendar to select a date. For today's date, click and hold the date field and select 'Today...'. To clear a date, click and hold the date field and select 'Clear...'.  

13. Every field has a  button beside it. Select this button to include additional information (comment, voice clip, attachment, or sketch) for that field. The button turns green when it contains information.
14. The Save option in the bottom right corner allows you to 'Save' your changes to the card or 'Save & Close' the card.

**To setup default data to avoid repetitious entry:**

1. On the Handheld, select a Template or Theme, then choose the Options menu from the bottom left-hand corner of the screen, and 'Edit Defaults'.
2. Fill out the fields that you would like to be defaulted on every new card you create (note: the defaulted data can be edited in the card).

### 3.2.10 Backing Up and Restoring Cards

**To backup cards (data) on the handheld:**

From the main template list, select 'Options' > 'Backup...', then select the template you wish to backup from the list. The first time you backup, you will be prompted to choose a location for a backup folder. If you wish to change this later, you can select 'Options' > 'Change Backup Folder' and select a new location.

**To restore a backup on the handheld:**

From the main template list, select 'Options' > 'Restore', then select the backup folder. You will be prompted for which cards to restore.

**To backup and restore cards on the desktop:**

Use Snap Package (.SnapPkg) exporting and importing to backup and restore data. This method also makes a backup of your templates and themes that you export.


### 3.2.11 Deleting Data from SNAP! Client

Completed cards can be deleted from SNAP! Client. Please ensure that you no longer require this data before deleting it as there is no way to retrieve it later. To backup your data before deleting, [export a Snap Package](#).

**To delete cards (data) from the desktop:**

1. To remove a single card, select it from the tree and choose 'Delete [card name]' from the Edit menu
2. To remove multiple cards, choose 'Delete Multiple Cards' from the Edit menu, then select the cards from the list

**To delete card sections from the desktop:**

1. Using the Section View tab, select the appropriate card from the tree
2. Choose the section you wish to delete, then use the  **Delete button** at the top of the card

### 3.2.12 Deleting Data from SNAP! Mobile

Completed cards can be deleted from SNAP! Mobile. Please ensure that you no longer require this data before deleting it as there is no way to retrieve it later.

**To delete cards (data) from the handheld:**

**OPTION 1** - If your handheld is connected to your PC, you can use SNAP! Mobile to delete cards from the handheld:

1. Select 'Manage Data on Mobile Device' from the Mobile Device menu
2. In the Cards section, select the cards shown as 'On Device - Now' that you wish to delete

(they will highlight in red with an Action of 'Remove')

3. You can also remove the Template and/or Theme associated with the cards by choosing them under the Templates section (this will remove all associated cards)
4. Choose the **'Go' button**

**OPTION 2:**

1. On the handheld, select the card from the main SNAP! window
2. Choose 'Options...Card:xxx...Delete' from the bottom left-hand corner of the screen
3. Follow the onscreen instructions

### 3.2.13 Exiting SNAP! Mobile

To properly close SNAP! on the handheld, choose 'Options... Close SNAP' from the main screen. If you use the 'X' in the upper right-hand corner, SNAP! will still be running in the background.

**Part**

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## 4 Appendix A: Troubleshooting

### ***Handheld:***

**Problem:** "Error - This application (SnapMobile) requires a newer version of the Microsoft .NET Compact Framework than the version installed on this device."

**Solution:** Download and install Microsoft .NET Compact Framework 3.5 from <http://www.microsoft.com/downloads/details.aspx?familyid=e3821449-3c6b-42f1-9fd9-0041345b3385&displaylang=en>

**Problem:** "Error - SnapMobile.exe: InvalidProgramException"

**Solution:** Download and install Microsoft .NET Compact Framework 3.5 from <http://www.microsoft.com/downloads/details.aspx?familyid=e3821449-3c6b-42f1-9fd9-0041345b3385&displaylang=en>

**Problem:** ".NET CF Initialization Error - The application failed to load required components. If the .NET Compact Framework is installed on a storage card, please ensure that this card is in place and launch the application again. If this fails, a re-installation of the .NET Compact Framework is recommended."

**Solution:** Follow the instructions within the error message, ensuring that you have downloaded and installed Microsoft .NET Compact Framework 3.5 from [www.microsoft.com/downloads](http://www.microsoft.com/downloads).

**\*\* Please Note:** *All other versions of .NET Compact Framework 3.5 must be removed from your handheld. To do so, go to Settings... System... Remove Programs and browse for previous versions of .NET CF. If there are any previous versions and you are having trouble running SNAP!, please select the older version and choose 'Remove'.*

**Problem:** "Could not create directory" error when trying to install SNAP! on the handheld.

**Solution:** Download the version for mobile device from the website at <http://www.jrpltd.com/Support/Updates.aspx?Product=SNAP> and put the file onto the handheld. Run the .CAB file on the handheld to install SNAP! Mobile.

**Part**

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## 5 Appendix B: Technical Support

**Help Desk:**

Technical support is available for licensed SNAP! dcs users. The Help Desk is open Monday to Friday, 8:00 a.m. to 5:00 p.m. PST. We are closed for Canadian statutory holidays.

**Phone:** 1-800-535-2093 ext. 300 *or* (250) 703-0451 ext. 300

**E-mail:** [support@jrpltd.com](mailto:support@jrpltd.com)

Please have the following information available when contacting us:

- PC Operating system (i.e. Windows version)
- Windows CE/Mobile version
- SNAP! version
- Any error messages that may have occurred

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