

QuickFormz

Data Conduit User Guide

Version 1.1

Table of Contents

Copyright Notice.....	3
Overview.....	4
Quick Start.....	5
Data Format of QuickForm CSV Files.....	8
Using Multiple Users or Handhelds.....	10
Using a Different PC.....	11
Troubleshooting.....	12

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Overview

The QuickFormz Data Conduit is a Palm HotSync®-compatible conduit, which uploads (“synchronizes”) the information or data collected on your Palm to your PC. Any QuickFormz session data that is collected and marked as "Complete" on the Palm OS™ handheld using QuickFormz Viewer for Palm, is saved to a destination folder on the PC when a HotSync® operation is performed. Data is saved in CSV (comma-separated values) file format on the PC to allow flexible importing into other desired file formats (e.g. Excel, Microsoft Access).

Since the QuickFormz Data Conduit is a HotSync®-compatible conduit, it does not require any special action to initiate or start it. It is activated and run automatically during the regular HotSync® process for users that it is registered for. All you have to do is HotSync your Palm as you typically do.

Quick Start

The QuickFormz Data Conduit can be set up and ready to use in a few easy steps:

- 1) Ensure the **QuickFormz Data Conduit** is installed on any PC which you will be synchronizing to. If you have already done this, proceed to **Step 2)**. If you have not installed the conduit yet, please do so by running the **QuickFormz Installer** on that PC and follow the instructions in the Installation Wizard.
- 2) When you are ready to synchronize QuickFormz data from your Palm OS™ handheld (i.e., you have collected QuickFormz data, using **QuickFormz Viewer for Palm**), begin the typical HotSync® operation as you normally would with the Palm device and the PC (e.g. Local Cradle, Infrared, Network).
- 3) Let the HotSync® process proceed as usual. During the HotSync® process, the **QuickFormz Data Conduit** will eventually start. A dialog window will appear on the PC, as seen below (**Figure 1- Default Destination Dialog**):

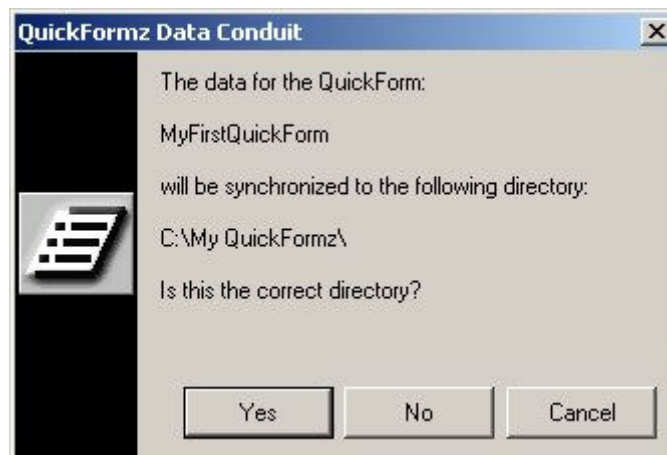


Figure 1- Default Destination Dialog

This dialog window displays the default destination directory on the PC (see **QuickFormz Designer Help** documentation for more information) where your data will be saved. Press “Yes” to proceed with synchronization.

Sometimes, you will see the dialog window below (**Figure 2- Invalid Destination Path Dialog**) instead:



Figure 2- Invalid Destination Path Dialog

This dialog will appear when the default destination directory path is invalid (e.g., the directory does not exist on this PC). Press “**Yes**” to select a new default destination directory. Press “**No**” to cancel the **QuickFormz Data Conduit** synchronization.

- 4) If you have pressed “**No**” in the “Default Destination Dialog” or pressed “**Yes**” in the “Invalid Destination Path Dialog”, you will be presented with another dialog window to select a new default destination directory (**Figure 3- Directory Browser Dialog**):



Figure 3- Directory Browser Dialog

Press “**OK**” once you have selected a new directory.

Note: *Subsequent synchronizations will use this new destination path as the default. This default path is stored on the Palm OS™ handheld, and will be used whenever this particular device is synchronized with any PC where the QuickFormz Data Conduit is installed.*

- 5) All session data on the handheld marked as "**Complete**" will be uploaded onto the PC to the designated directory and removed from its memory after successful completion.
- 6) When the entire HotSync® operation has completed, you can view your uploaded data in the CSV files created at your destination directory. If the **QuickFormz Data Conduit** encountered problems during the synchronization, error details will be logged to the Palm HotSync® Log (Accessible via the HotSync® Manager).

Data Format of QuickForm CSV Files

Using your QuickFormz application, you will be able to quickly and easily collect data on your Palm OS™ handheld, in separate “sessions”. Session data that is marked as “Complete” using the **QuickFormz Viewer** application is then synchronized to your PC and saved in CSV (comma separated values) format. With the CSV format, one can easily import the data into other formats for storage and further analysis, with applications, such as Microsoft Excel or Access.

The **QuickFormz Data Conduit** saves your data in the following manner:

- 1) Data from each session is saved as a CSV (.csv) file, with the naming convention:

QuickFormName_export.csv, where:

- a. “**QuickFormName**” is the name of the respective QuickForm for which the data was collected
- b. Example of a CSV filename: *ShoppingSurveyQuickForm_export.csv*

- 2) The CSV file is saved in a subfolder, where its directory path is as follows:

DefaultDestinationDirectory\YourPalmUsername\FormName_TimeStampofHotSync, where:

- a. “**DefaultDestinationDirectory**” is the default destination directory (presented in a dialog during the **QuickFormz Data Conduit** operation)
- b. “**YourPalmUsername**” is a directory named after the Palm username used during the **QuickFormz Data Conduit** operation. If the Palm username is empty, then the name “unknown_user” will be used. Palm usernames containing any of the characters “. ” < > : / \ | * ?” will have those characters replaced by “_”.
- c. “**TimeStampofHotSync**” is a directory named after the date and time the **QuickFormz Data Conduit** synchronization was performed. The timestamps are in the following format: Month-Day-Year_Hour-Minute-Seconds-mSecs
- d. Example of a directory path: *C:\My QuickFormz Data\john\MarketSurvey_2-10-2004_11-49-22-993*

- 3) Data from each QuickForm session will be saved within the CSV file as separate rows. Rows are ordered in the CSV file in descending order by the session creation dates.
- 4) The first row of each CSV file will start with the field names. The first field name will always be the row index.
- 5) The CSV file uses the double quotation mark (“”) as the text qualifier. Any field data containing a comma or a double quotation mark will be formatted using the text qualifier. For example, a field with this data:

audio, video

will be replaced with:

“audio, video”

A field with this data:

The client stated,”I will pay tomorrow”

will be replaced with:

“The client stated,””I will pay tomorrow””””

NOTE: When importing the CSV file to MS Access be sure to set the checkbox stating that the first row contains the field names and to set the text qualifier to “.

Using Multiple Users or Handhelds

As described in the **Data Format of QuickForm CSV Files** section above, the **QuickFormz Data Conduit** automatically separates synchronized data into subfolders. This is to prevent confusion in cases where multiple QuickFormz users share the same PC. There are two types of situations involving multiple users:

- 1) Multiple QuickFormz users, each collecting QuickFormz data **on his/her own Palm device**, and sharing the same PC, on which the QuickFormz Data Conduit is installed
- 2) Multiple QuickFormz users, all collecting QuickFormz data **on a single, shared Palm device**, and sharing the same PC, on which the QuickFormz Data Conduit is installed

In the first case, no additional configuration is needed, assuming that each Palm device is associated with a unique Palm username. Each user's data is separated into subfolders based on usernames.

In the second case, since all users are essentially using the same Palm username to synchronize their data, additional action is required to make data separation easier. To separate data, each user can manually specify their own destination directory (**Step 3** of the **Quick Start** section of this manual), each time they synchronize their QuickFormz data. By specifying the destination directory to their own personal folder each time, each user can prevent his or her QuickFormz data from being uploaded to a shared destination directory, where the Palm username is not unique and being shared by other users.

Using a Different PC

Installation of the **QuickFormz Data Conduit** is required on any PC where data synchronization will be performed. If a user synchronizes data on multiple PC's, the data will end up in the designated destination folder on each PC. The user will have to manually merge data together from separate PC's if so desired.

Troubleshooting

If you are having trouble successfully synchronizing your QuickFormz data from your Palm handheld to the PC, be sure to verify the following items before contacting our technical support:

- Verify that the QuickFormz data you need synchronized is marked as a “Complete” session in the **QuickFormz Viewer** on your Palm OS™ device
- Verify that the your HotSync® process is operating successfully
 - Follow all the typical steps as stated in Palm Desktop™ documentation to verify that the HotSync® operation is running normally (e.g., HotSync® Manager is running, your HotSync® Manager is configured correctly)
- View the HotSync® Log for error messages
 - Start the Palm HotSync® Manager and select View Log to view the HotSync® Log
 - Verify that the last HotSync® operation completed successfully
 - Verify that during the HotSync® operation, the **QuickFormz Data Conduit** started and ended successfully. The log resulting from a successful HotSync® operation should display:

-- Synchronizing QuickForm *name* to data directory
C:\mydir\.

OK QuickFormz Data Conduit

If no data was synchronized then it should display the following:

No data was synchronized

OK QuickFormz Data Conduit

If the synchronization was cancelled:

*Warning Quickform: MyFirstQuickForm : Data directory
selection was cancelled or is invalid.*

Quickform MyFirstQuickForm_Data not processed.

No data was synchronized.

OK QuickFormz Data Conduit

- The **QuickFormz Data Conduit** may log several types of error messages:
 1. QuickFormz Palm database access errors
 - a. *Could not open database [dbname]*
 - b. *Could not obtain record count*
 - c. *Could not delete record*
 2. QuickFormz Palm database meta data access errors
 - a. *Could not read AppInfo block – Error occurred when accessing QuickFormz meta data*
 - b. *AppInfo block size is invalid – QuickFormz meta data has an unexpected size. The QuickFormz meta data may be corrupt.*
 3. Warnings - Typical log output when synchronization is cancelled or there is no data to synchronize.
 - a. *No data was synchronized – Data was not written to the PC*
 - b. *Warning: Database: MyDBName: Data directory selection was cancelled or is invalid.*
 - c. *QuickFormz: MyDBName not processed – QuickFormz database was not synchronized to file.*

In any of these cases (except for warnings), it is most likely your QuickFormz session data was corrupted on the Palm™ handheld. You can try:

1. Attempting the HotSync operation once again
 2. Using **QuickFormz Viewer** on your Palm™ device, delete the session data and recollect the data in a new session
- Verify that the default destination path (as shown in the dialog during synchronization and in the HotSync log) matches the directory location you are expecting to find the data

If the above steps still fail to solve the problem, please reach us at our Web site:

Web: <http://www.lokiologic.com>