

Chapter 2: Installing the Software

Please take a moment to read through this chapter to make sure your computer meets the minimum requirements needed to use PocketSurvey; and that you have the necessary components installed on your system.

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System Requirements

The PocketSurvey software suite contains everything you need except a handheld computer and some data analysis software such as Microsoft Access.

You can use the PC handheld simulator to run your surveys but most users wish to collect their survey data using handheld, so you will benefit from having a handheld computer running Microsoft CE Version 3.

Essential Requirements

- A PC suitable for running Windows 98 or above. You can run PocketSurvey on Windows 95 systems but you must also have also installed the Microsoft HTMLHelp viewer and Internet Explorer. Contact us for details on how to do this – it is easy.
- PocketSurvey does not take up much disk space. However at least 5 megabytes of free disk space is recommended.

Optional Requirements

- **ActiveSync.** Microsoft ActiveSync is required if you want to connect to your handheld computer.
- **Handheld.** A suitable handheld computer running Windows CE Version 3 or above such as the iPAQ or Casio. For those without a handheld computer you can use the integrated handheld simulation program on your PC.
- **Analysis Tools.** PocketSurvey contains simple data reporting in HTML formatted reports, but these are designed mainly for checking your data after receiving it from the handheld computer.

To get more meaningful reports from your collected information you will need either a spreadsheet program or, better still, a database such as Microsoft Access. Other software types such as statistical analysis packages and geographical information systems can also be used. PocketSurvey outputs data in comma separated format that will integrate with most database tools.

Additional Handheld Licenses

The PocketSurvey single user starter suite includes one license for one handheld computer. If you plan to work with more handhelds you can buy additional handheld licenses at any time, but you may find it more economical to buy our five user license. Special prices for multiple user, site or company licenses can be arranged on request.

Installing PocketSurvey on your PC

The set-up program (POCKETSURVEY.EXE) will copy the required files to your hard disk and configure your system. It is a good idea to close all running Windows applications before running the set-up program.

You can run the set-up program from the PocketSurvey CD or from your hard disk if you have downloaded it from the Internet. Installing PocketSurvey is easy; simply follow the on screen instructions presented by the installation program.

- After installing the PocketSurvey files, the set-up program creates a desktop icon for the PocketSurvey group containing icons for the examples, questionnaire samples, online user manual and the program itself.
- We recommend that you follow through the example questionnaires, the sample questionnaires and the browse through this online user manual.
- Please read the file README.TXT after installing PocketSurvey, as this contains important last-minute information regarding PocketSurvey.

Green Installation

The PocketSurvey installation is known as a 'green' installation. This means that it will not place files anywhere other than in its own directory, nor will it add programs to your Windows folder. This means that should you choose to remove PocketSurvey from your system you will not have any redundant files remaining on the computer.

Note. For ease of re-installation PocketSurvey adds a few lines to a file called WIN.INI but this will not harm your system.

For more information about what is installed, see "[Appendix B — Files & Folders](#)".

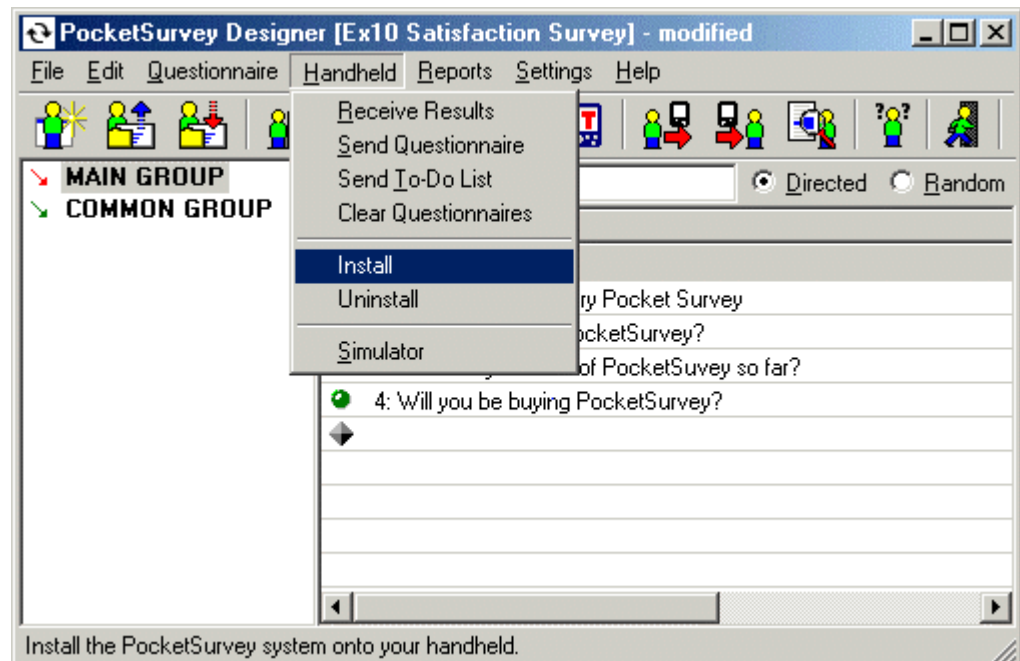
Using PocketSurvey on a Network

PocketSurvey is designed so that it can be installed on a network server in any desired folder and shared by several users if required. Users can choose where they store their questionnaire files, and to prevent others inadvertently loading or overwriting their files this could be in a private data area on the server or on the user's own hard or floppy disk. If you are unsure of how you could use PocketSurvey on your network, you should speak to your network manager or contact Handheld Systems for advice.

Installing PocketSurvey on your Handheld

Once you have installed PocketSurvey on your desktop PC, make sure that ActiveSync is running. Then run the PocketSurvey program on your PC and follow the steps below.

- From the PocketSurvey menu select **HANDHELD | INSTALL** from the PocketSurvey menu to install the PocketSurvey Mobile software on your handheld computer.



- Repeat the sequence for each of your handheld computers if you have purchased multiple mobile licenses.
- To remove a license from a handheld computer select **HANDHELD | UNINSTALL** from the PocketSurvey menu.

Note You can only install PocketSurvey Mobile on as many handheld computers as you are licensed for. Contact us to add more licenses at any time.

Un-installing PocketSurvey from your Handheld

If you wish to use PocketSurvey on more handheld computers than for which you are licensed, you will need to uninstall from one handheld before you are allowed to activate it on another.

To do this, make sure that ActiveSync is running, then select **HANDHELD | UNINSTALL** from the main PocketSurvey Menu.

Upgrading to a New Version

Handheld Systems are committed to a continuous programme of refinement and improvement of PocketSurvey, so you will always be assured of having the best possible features, capacity and ease of use.

We have a policy of free minor upgrades within a major release and a preferential upgrade price to the next major version. You can download minor upgrades from our web site. Only when you install a new major version will you need to purchase a new license key.

To install a minor upgrade. Just install over the top of your existing system. Your previous settings and license key remain untouched.

Note. *Our upgrade policy is based on our market research into users wants/needs: we found that most users were unhappy with the constant barrage of costly upgrades that are associated with other products!*

Upgrading your handheld

Once you have upgraded your PC software you will also need to upgrade your handheld computer's software to the latest version. To do this, connect your handheld to your computer and make sure that ActiveSync is running. Then follow the steps described in [Installing PocketSurvey on your Handheld](#).

Troubleshooting

Look out for the following when installing:

- **Re-installing and applying updates.** This should normally not be a problem but if it is, delete your existing PocketSurvey folder and its contents, being careful to keep copies of any of your own questionnaires and re-install.

Removing PocketSurvey

We hope you never choose to remove PocketSurvey, but if you do need to, we have made it easy for you! Follow these steps:

- 1 Save your work.
- 2 Close PocketSurvey.
- 3 Choose Uninstall PocketSurvey from the Windows Start menu.

PocketSurvey deletes all the directories and files that it previously installed, but will leave new files that you have created yourself.