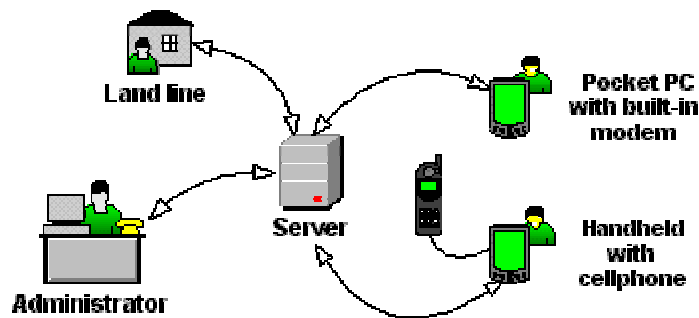


Chapter 15: Using the Internet

The **INTERNET** options in PocketSurvey allows you to transfer information between your desktop and any number of handheld computers via the Internet. This means that you can send questionnaire forms and receive results to and from your mobile workforce while they are out in the field.



To make use of this facility you will need access to an FTP (File Transfer Protocol) site. Most Internet Service Providers can provide this service and it sits alongside other Internet facilities such as email and web hosting. If you want help or information about how to set up an FTP site we will be pleased to advise you.

Access to the Internet facilities is via menus and is very simple and easy to use on both the desktop and handheld versions of PocketSurvey.

- [Using the Internet on the Desktop](#)
- [Using the Internet on the Handheld](#)

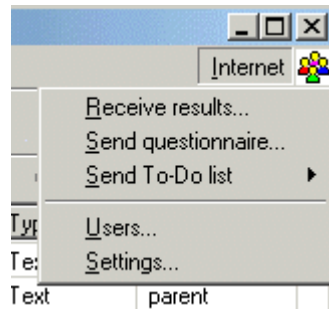
In many ways using the Internet to transfer information is better than a direct cable connection. For instance, mobile workers can deposit data at any time - they are not tied to office hours. Similarly, administration back at the office is easier as data can be received as a batch instead of waiting for each mobile worker to return.

The basic idea is that data is not transferred directly between source and destination; instead, it is sent to an intermediate location (the FTP server) where the recipient can pick it up at any time. Because the Internet never sleeps, the sender can send at any time and, likewise, the receiver can receive at any time; there is no need for the sender and the receiver to synchronise their activities.

Data from multiple users never gets confused as each user has their own folder on the server. Once this is set up the user does not need to know how or where the information is kept - they simply just send and receive data - the PocketSurvey Internet system takes care of all the housekeeping.

Using the Internet on the Desktop

The **INTERNET** menu, shown below, controls all aspects of communications with the central Internet server. This option appears at the far right of the main menu bar.

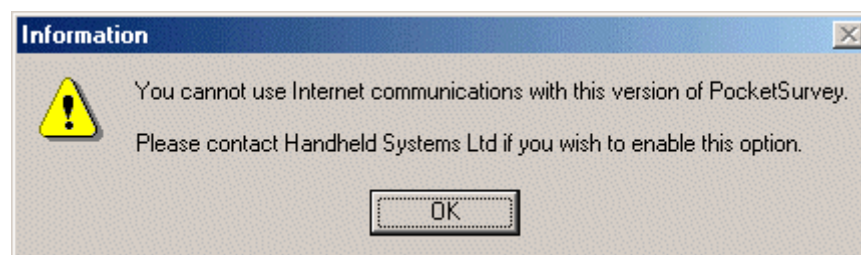


The **Receive results**, **Send questionnaire**, and **Send To-Do list** options are operations that you will probably use on a regular basis. The **Users** and **Settings** are administrative operations and normally should not change too often.

- **Internet | Receive Results**
- **Internet | Send Questionnaire**
- **Internet | Send To-Do List**
- **Internet | Users...**
- **Internet | Settings...**

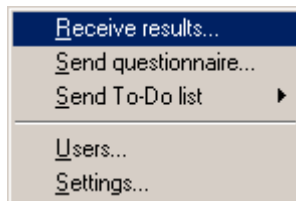
Note

The Internet facility is an optional extra for the desktop software. If you see the following message, when accessing the desktop menu option, it means you have not purchased the Internet option.



Internet | Receive Results

The **INTERNET | RECEIVE RESULTS** menu option, shown below, displays a screen allowing you to receive results, for the currently loaded questionnaire, from one or more mobile users. Survey results are retrieved from the user locations on the central sever as defined in the **Internet | Settings** screen.



As soon as results are received they may be viewed using the **Reports | Results** menu option.

Note

Data will only be retrieved for the current questionnaire. If results for other questionnaires are required then you will need to open each questionnaire in turn and receive results for each one.

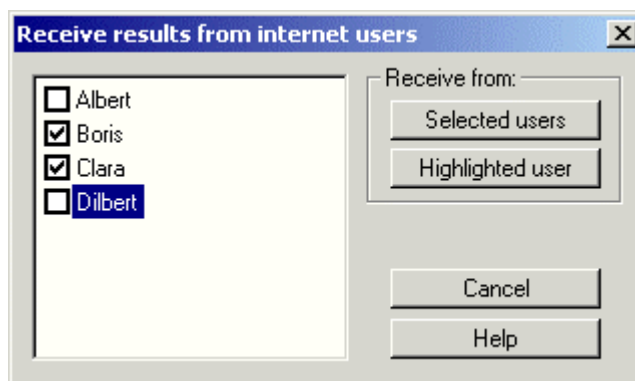
When a **Receive** operation completes successfully PocketSurvey appends the data files on the server with the extension **.BAK**. This does two things: firstly it provides level of security should you wish to re-instate the original data; secondly it allows the user to send another set of results.

Important!

If a user's survey results are allowed to remain on the server then they will block the user from sending subsequent results until they are cleared.



Receive Results from Internet Users Screen



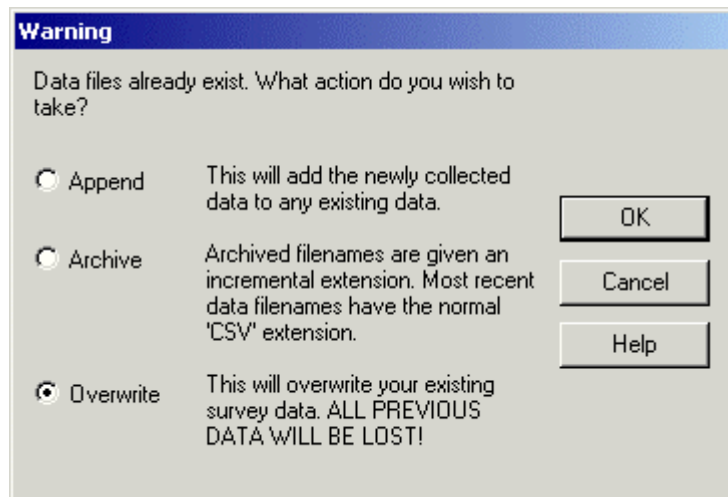
Selected users button

Quite often it is convenient to receive results from several users in one go. This option allows you to receive from a batch of users.

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In the example, **Boris** and **Clara** are shown with ticks against them. This means that when you click the **Selected users** button the system will attempt to receive results for Boris and Clara. (We say *attempt* because the success of the operation depends on Boris and Clara having left some information to be retrieved.)

If data already exists for the currently loaded questionnaire on the desktop then you will be presented with the dialog shown below.

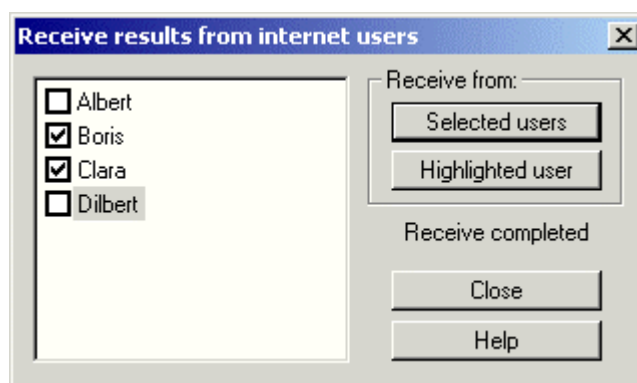


This will **ONLY** appear for the first user in the batch. Results for all following users in the batch will always be appended to the current data.

The users that you selected will be remembered the next time that you use this dialog.

Highlighted user button

Sometimes you may wish to receive from just one particular user. So that you do not have to de-select your current batch of users this option allows you to select just one easily.



In the example screen above, **Dilbert** is shown highlighted. This means that when you click the **Highlighted user** button then the system will attempt to receive results for Dilbert (even though there is no tick against him).

Commonly Used Buttons

The commonly used buttons **CLOSE**, **CANCEL** AND **HELP**, work as expected.

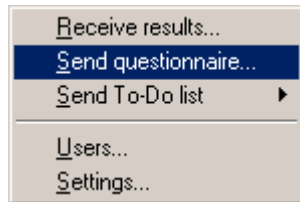
Note

During an receive operation PocketSurvey will display the progress at the bottom of the dialog. When the receive operations has completed the **Cancel** button will change to **Close**.

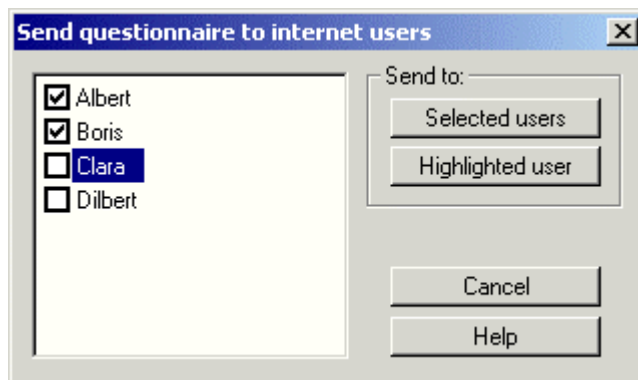
Internet | Send Questionnaire

The **INTERNET | SEND QUESTIONNAIRE** menu option, shown below, displays a screen allowing you to send the currently loaded questionnaire to one or more mobile users.

The currently loaded questionnaire is sent to the user locations on the central sever as defined in the **Internet | Settings** screen.



Send Questionnaire to Internet Users Screen



Selected users:

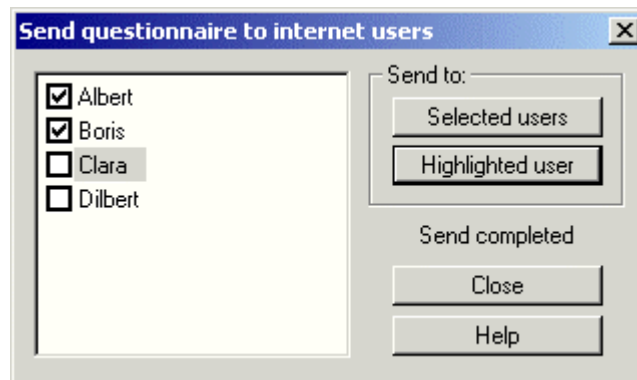
Quite often it is convenient to send questionnaires to several users in one go. This option allows you to send to a batch of users.

In the example, **Albert** and **Boris** are shown with ticks against them. This means that when you click the *Selected users* button the system will send the current questionnaire to Albert and Boris' folder.

The users that you selected will be remembered the next time that you use this dialog.

Highlighted user

Sometimes you may wish to send to just one particular user. So that you do not have to de-select your current batch of users this option allows you to select just one easily.



In the example above, **Clara** is shown highlighted. This means that when you click the **Highlighted user** button then the system will send the current questionnaire to Clara (even though there is no tick against her).

Commonly Used Buttons

The commonly used buttons **CLOSE**, **CANCEL** AND **HELP**, work as expected.

Note

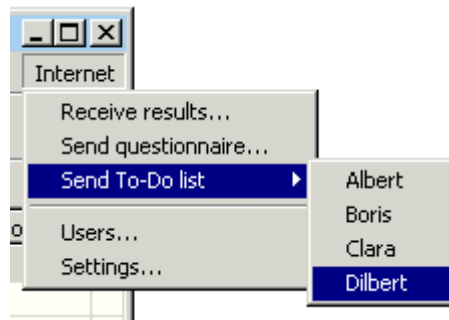
During an Send operation PocketSurvey will display the progress at the bottom of the dialog. When the receive operations has completed the **Cancel** button will change to **Close**.

Internet | Send To-Do list

The **INTERNET | SEND TO-DO LIST** menu option, shown below, allows you to send a schedule of work, for the currently loaded questionnaire, to a selected mobile users by picking the recipient directly from the popup menu of users.

Note

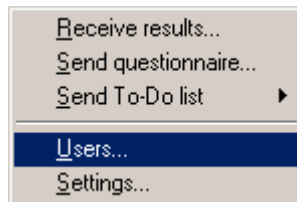
Because 'To-Do' lists are specific for each mobile worker they are always sent on an individual basis.



When this operation completes successfully PocketSurvey appends the to-do list with an incremented extension, starting at **.001**. This prevents the same to-do list being re-sent to a different user.

Internet | Users

The **INTERNET | USERS** menu option, shown below, displays a screen allowing you to set up a list of settings for each mobile worker.



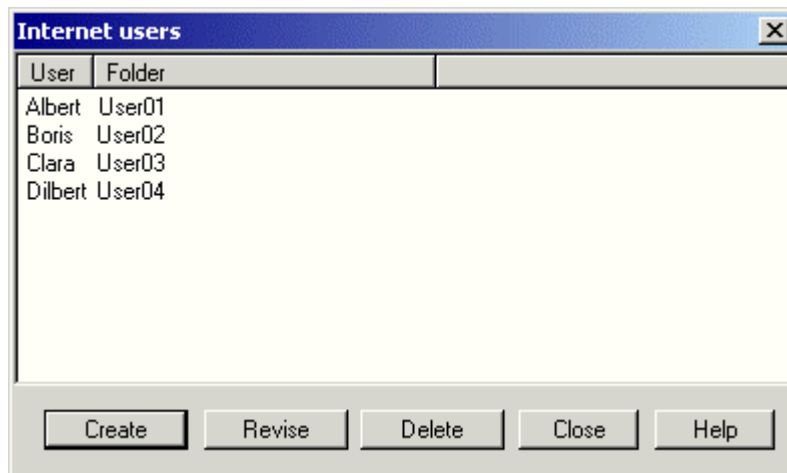
Advice

You should consult your in-house IT department for details of setting up a company FTP server with user accounts. If you do not have in-house capabilities for such a server **contact Handheld Systems Ltd** to find out how we can set one up for you.



Internet Users Screen

Once your FTP Server is up with user accounts for each of your mobile workers you simply need to tell PocketSurvey where each of those users' data is located on the server. You do this using the screen shown below.

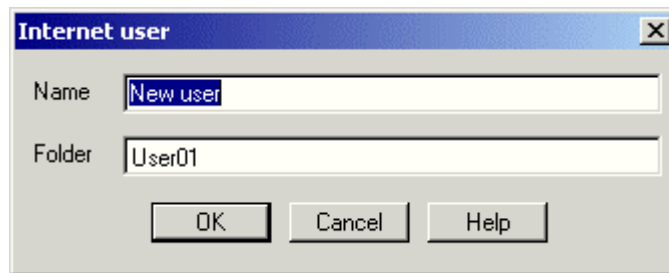


Current users' names are shown in the first column. The second column shows the location on the server where any files for that user will be placed.

Create

The **Create** button displays the screen shown below allowing you to define a new user account.

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User names must be unique. If you enter an identical name to an existing user then the original user details will be replaced with those of the newly created one.

The folder will default to that set up in the **Internet | Settings** dialog but you should ensure that this changed to be a unique location for each user.

Revise

To revise user details highlight the particular user then select this option to produce a dialog similar to that produced by the *Create* option.

Delete

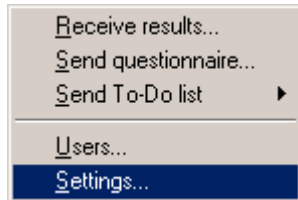
To delete user details highlight the particular user then select this option. The user's details will be removed from the system.

Commonly Used Buttons

The commonly used buttons **CLOSE**, **CANCEL** AND **HELP**, work as expected.

Internet | Settings

The **INTERNET |SETTINGS** menu option, shown below, displays a screen allowing you to define how to access your central FTP server.



Internet Settings Screen

 A screenshot of a dialog box titled 'Internet settings'. It contains five input fields: 'Administrator' (pocketsurvey), 'Password' (masked with asterisks), 'Server' (ftp.pocketsurvey.co.uk), 'Default folder' (User01), and 'Port number' (0). There are three buttons on the right: 'OK', 'Cancel', and 'Help'.

The first three items should reflect your account settings on the FTP server. If you change any of these details on the server then you will need to change them here too.

Administrator

This is the account name that you use to log on to the FTP server.

Password

This is the password that you use when you log on to the FTP server.

Server

This is your FTP site location.

Default folder

For convenience, whenever you **create a new user** this will be shown as the default data location for that user.

Port number

Leave this at zero to allow the system to automatically select the default port number. However, if you are not using the standard port number (usually 80) then you can override the default value here to force the system to use a particular port.

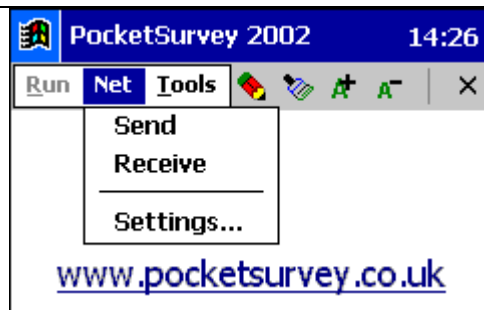
Using the Internet on the Handheld

Because of space limitations on the handheld and the handheld simulator, the Internet option appears on the menu bar as the **Net** menu as shown below.

The first two items: **Send** and **Receive** are options that you will probably use on a regular basis. The **Settings** option would normally be used when you first set up the handheld and you should not need to change the settings very often.

Note

Operations on the handheld simulator are identical to those on the handheld itself, with the exception that the simulator can automatically dial-up and disconnect from the Internet when necessary.



- Net | Send
- Net | Receive
- Net | Settings...

Connecting the Handheld to the Internet

Before you can begin transmitting data you will need to establish an Internet connection using the instructions supplied with your handheld device.

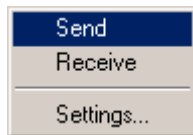
PocketSurvey does not connect to the Internet automatically on Pocket PCs machines so, if an Internet connection is not established, PocketSurvey will inform you whenever you start a **Send** or **Receive** operation.

Extra Hardware Required

Some handhelds, such as the *Trium*, have a cellular phone and modem built in. Others such as the Compaq iPaq have accessory cards that are added to the base unit to provide wireless or wired modem facilities.

Net | Send

The **Net | Send** option will send *all* your questionnaire results to the server. Once your results have been received by the server the files that are currently on your handheld will have their filenames appended with the extension **.BAK**, this allows you to start collecting new data.



This operation may fail if there are existing data files on the server that clash with the ones you are attempting to send. You will not be able to send this data until the System Administrator has received your data back at the office and cleared it from the server. If this happens you will have to either wait until the data is cleared or inform your System Administrator of the problem.

Net | Receive

The **Net | Received** option, shown below, receives new or updated questionnaire forms and To-Do lists. You do not need to specify which files that you want - you will receive whatever files the System Administrator has placed in your server folder. Any existing files on your handheld will be overwritten.



Net | Settings

The **Net | Settings...** menu option shown below displays a screen to configure your handheld's access to the Internet.



Net Settings Screen

The **Net | Settings** screen is normally used when you first set up the handheld and you should not need to change the settings very often.

 A screenshot of the 'NET settings' dialog box. It has a title bar 'NET settings' and four input fields: 'User' with 'pocketsurvey', 'Password' with 'xxxx', 'Server' with 'ftp.pocketsurvey.co.uk', and 'Folder' with 'mobile001'. At the bottom are 'OK' and 'Cancel' buttons.

User

This is your user name as set up by the System Administrator.

Password

This is the password required to access your account on the Internet. You do not need to enter your password every time you perform a **Send or Receive** operation as the password that you enter here is remembered and used automatically.

Your System Administrator may like to change passwords on a regular basis, in which case, this is where you would do it.

Server

This is the location of your organisation's server site. Do not change it unless instructed to do so by your System Administrator.

Folder

This is where your data is held on the server. Do not change it unless instructed to do so by your System Administrator.

Commonly Used Buttons

The commonly used buttons **OK** AND **CANCEL**, work as expected.