

# ClickNOTES Pro Installation Guide

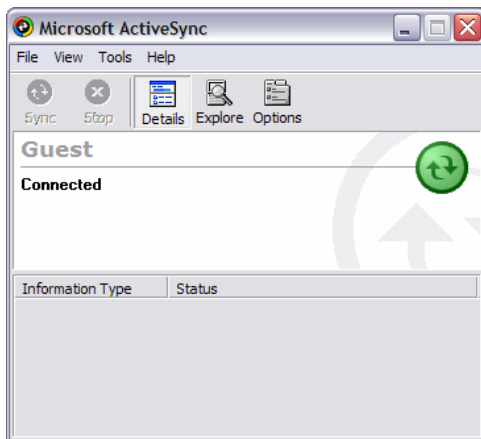
Products: ClickNOTES Pro v3.0  
ClickFORMS v3.3 or higher

Before you can begin using ClickNotes Pro, you must first complete a few simple steps. This document will show you how to:

- Install Microsoft ActiveSync
- Install ClickNOTES Pro
- Register or Evaluate ClickNOTES Pro

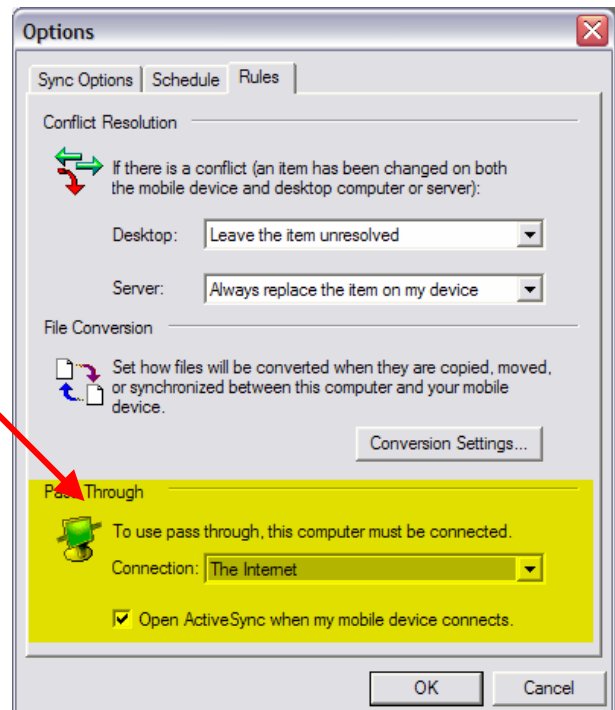
## • MICROSOFT ACTIVESYNC

1. The 1<sup>st</sup> thing to do is install Microsoft ActiveSync (v3.7 or higher), which came with your Pocket PC and allows you to create a partnership. You can read your ActiveSync documentation for installation instructions. After ActiveSync is installed, create a partnership between your PDA and computer. You can read the on screen instructions once ActiveSync has been installed.



NOTE: Your Pocket PC must be connected and synchronized with Microsoft ActiveSync in order for you to transfer files between ClickNOTES Pro and ClickFORMS. The following instructions will assume that your Pocket PC is already connected and synchronized.

2. In order for your Pocket PC to connect to the Internet via your main computer, in the ActiveSync window, click on the Options button, then click on the Rules tab. Make sure that the Pass Through option is set to **The Internet**. Doing this will facilitate registering or evaluating ClickNotes Pro.



**• INSTALL CLICKNOTES PRO**

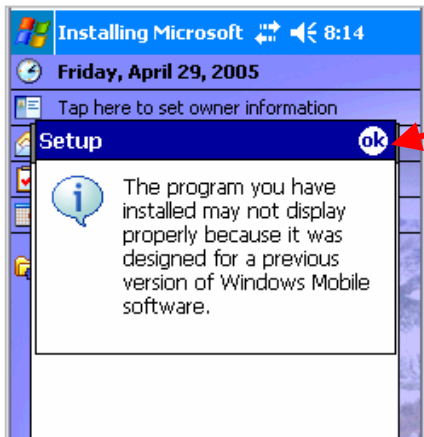
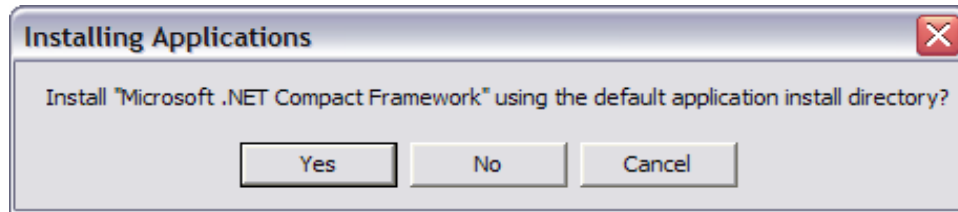
3. To start the installation, double-click on the ClickNOTESPro file you previously downloaded (or insert the ClickFORMS CD that came with your PDA and select **Install ClickNOTES Pro**).
4. Click **NEXT**, read the license agreement, check the box for **I accept...**, then click **NEXT** to continue.
5. By default, ClickNOTES Pro will install to C:\Program Files\Bradford\ClickNotesPro. If you wish to change the destination folder, click on the **Browse** button. Click **Next** to continue.



Note: We recommend you install ClickNOTES Pro to the default directory.

6. After the files are copied to your main computer, the Microsoft .NET Framework will begin to install. Click **YES** to install this application to your Pocket PC.

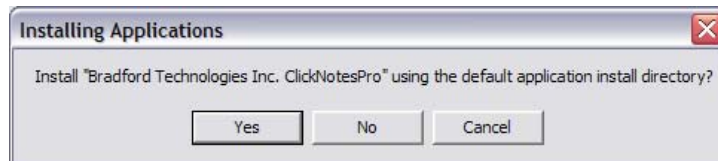
NOTE: If you already have the .NET framework installed, it is OK to overwrite the existing framework. Click **YES** to continue.



7. If you encounter this **Setup** notice on your Pocket PC after installing the .NET Framework or ClickNOTES Pro, please disregard it. Tap on the **ok** button to continue.

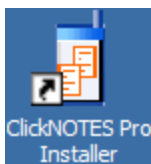
8. You will be asked to install **ClickNotes Pro**. Click **YES** to being the installation.

**NOTE:** Make sure you install ClickNOTES Pro to the **MAIN MEMORY** of your PDA.




**ATTENTION WINDOWS MOBILE 5 USERS:**

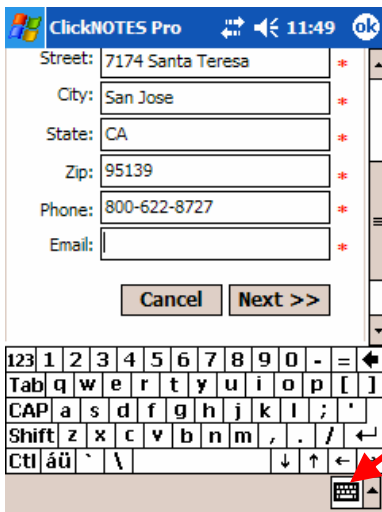
Once the installation completes on the desktop, you must run the ClickNOTES Pro Installer icon located on your desktop. This will install ClickNOTES Pro to your Pocket PC.



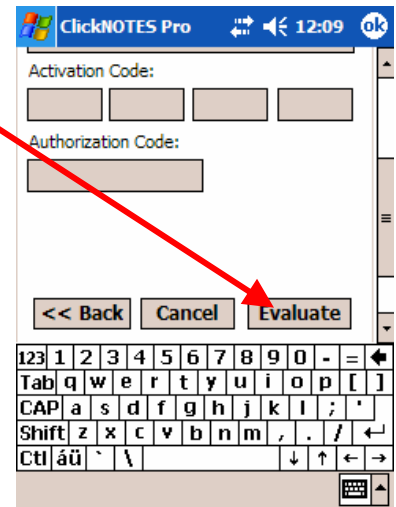
• **EVALUATE OR REGISTER CLICKNOTES PRO**

Before you start ClickNOTES Pro for the first time, make sure that your computer is connected to the Internet. If you have a dial-up Internet connection, make sure that you have a dial-up connection established before starting ClickNOTES Pro for the first time. This will facilitate the evaluation and registration process.

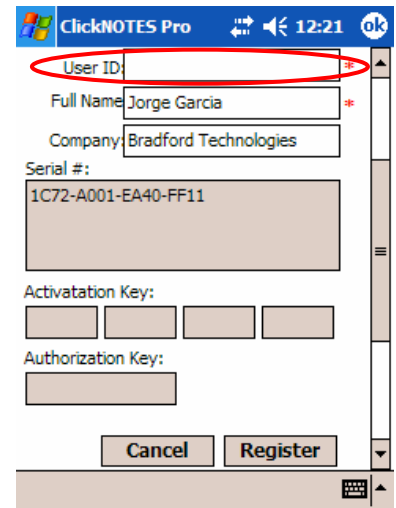
9. Once you have connected to the internet, connect your Pocket PC to your computer via the USB cable. Please refer to your Pocket PC documentation for further details.
10. To start ClickNOTES Pro on the pocket PC, tap on Start>Programs>ClickNOTES Pro
11. The first screen you see will allow you to register or evaluate. If you choose to evaluate, fill out the contact information screen as seen below. To fill this information out, tap on the field that you want to fill out then click on the keyboard icon  in the lower-right corner. When you finish adding your contact information, tap on **NEXT>>**. Now tap on **EVALUATE** to use ClickNOTES Pro for 30 days.



Tap to open the keyboard



12. If you choose to register, fill out your **User ID** which can be found on your ClickNOTES Pro invoice. The user ID is case sensitive. Once you fill this out, you can tap on **Register**. ClickNOTES Pro will connect online thru your PC (setup in step 2) and retrieve your unlocking information.




13. When evaluating, ClickNotes Pro will provide full functionality for 30 days. For more information on how to use ClickNotes Pro, please refer to the ClickNotes Pro User Guide.

# ClickNOTES Pro User Guide

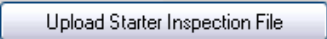
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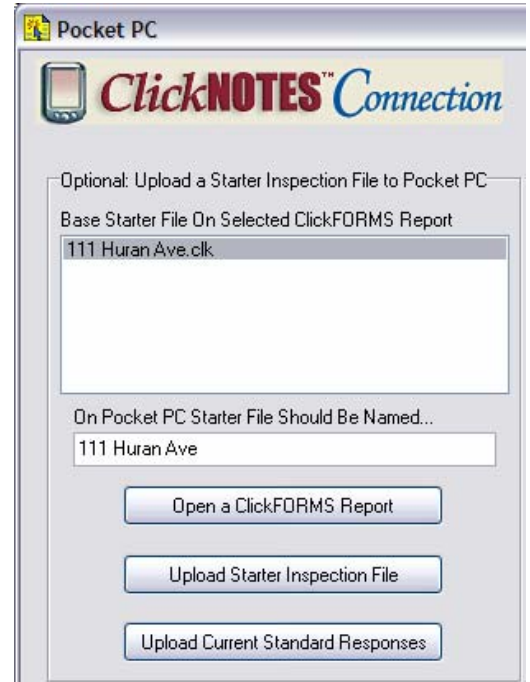
Once you have installed ClickNOTES Pro to your Pocket PC, you will be able to start using your PDA in the field. Before you take it to your 1<sup>st</sup> inspection, we recommend that you transfer your ClickFORMS standard responses into ClickNOTES Pro and also start a report in ClickFORMS with some basic information.

## • TRANSFER RESPONSES FROM CLICKFORMS TO CLICKNOTES

- ClickNOTES Pro can use the standard responses that you created in ClickFORMS. To transfer responses into ClickNOTES, open any report in ClickFORMS and go to Tools>ClickNOTES. On the lower-left side of the ClickNOTES Connection screen, click on  button. This will populate ClickNOTES Pro with all relevant responses from ClickFORMS.

## • TRANSFERRING A CLICKFORMS FILE TO CLICKNOTES

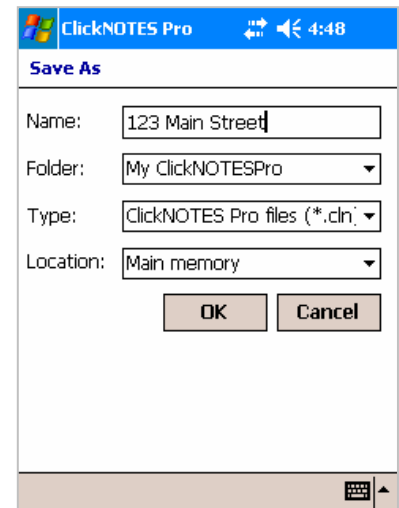
- You can easily transfer data from a ClickFORMS template or report into ClickNOTES Pro. To transfer, open the desired template or report in ClickFORMS. Go to **Tools>ClickNOTES** and on the lower-left side
- of the ClickNOTES Connection screen, click on the  button.



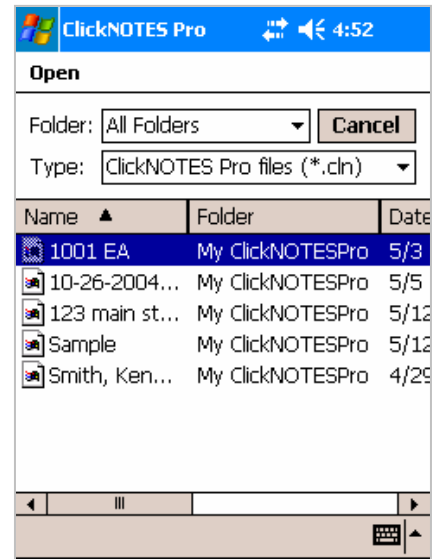
## WORKING WITH CLICKNOTES PRO

- To start using ClickNOTES Pro on the PDA, tap on **Start>Programs>ClickNOTES Pro**. The two main options you will choose are **Create New Report**, or **Open Report**.
- If you choose to create a new report, you will have the option to name your file. You will also see which folder your file will be saved to, the **Type** of file and the **Location**.

NOTE: Leave Location set to **Main memory**.



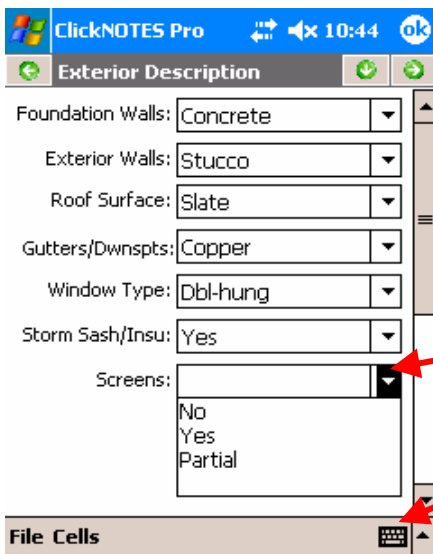
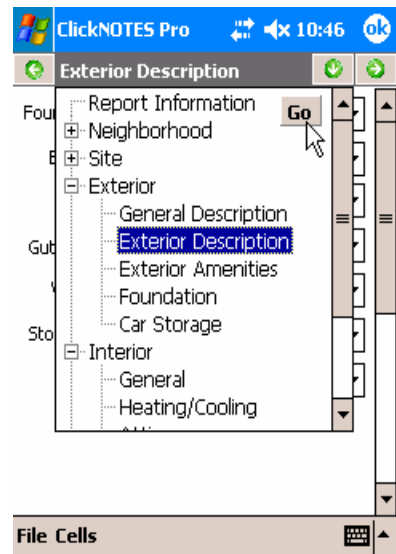
19. If you choose to open a report, you will have the option to select a file name. Just tap the file desired and it will open.



• **NAVIGATING**

20. Once your file opens, you will see the main **Inspection Areas** screen. This is where you can go directly to a specific area and start entering data. To select a specific inspection area, tap one of the plus '+' signs to expand that section, tap the area name desired, then click on **GO**.


21. At any time, if you want to return to the main Inspection Areas screen, tap on **ok** in the upper-right corner of any screen.

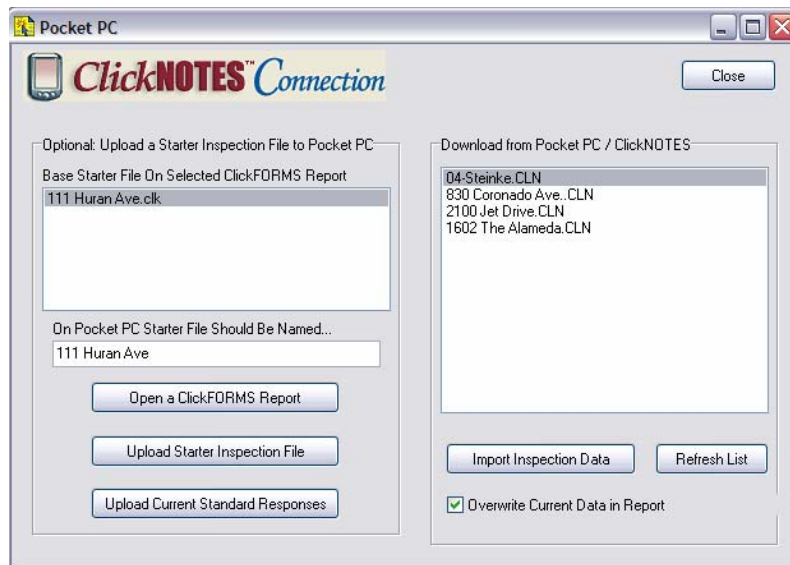


• **RESPONSES**

22. Using responses will make data entry easy and improve accuracy and quality. These responses will be the key in entering the data you collect for your inspection. Once you get to a specific inspection area, simply tap on the arrow at the right of a field then select a response. Do the same for all the areas you need to collect data for. If you need to input a word that is not listed as a response, click on the keyboard icon at the lower-right and type in what you need.

• **TRANSFERING CLICKNOTES DATA (PDA) TO CLICKFORMS**

- 23. Once you have collected the data on your pocket PC, connect your Pocket PC with your computer.
- 24. Open the desired report or template in ClickFORMS that you want to import data into
- 25. In ClickFORMS, select **Tools>ClickNOTES**
- 26. On the right side of the ClickNOTES Connection window, select your ClickNOTES file you would like to transfer from the PDA into the currently open report in ClickFORMS
- 27. In the lower-right, click on the  button. The data you collected on the pocket PC will transfer into the report you currently have open in ClickFORMS.



Your data from ClickNOTES (PDA) will now appear in the ClickFORMS report.