

Getting Started Manual



SmartList To Go®

Table of contents

Installing SmartList To Go	3
Launching SmartList To Go on the handheld	4
SmartList To Go toolbar	4
Creating a SmartList	5
The Field Editor Screen	8
The Form Design Screen	10
Records in your SmartList	14
Sorting records in a view	17
Assigning a password	18
Finding records	19
Cloning a SmartList	20
How to sync a SmartList to the desktop	21
Finding more information	22
SmartList To Go field types	23
About our products and services	24

Installing SmartList To Go

Memory Requirements

Installing SmartList To Go requires 780Kb free memory for the SmartList To Go handheld application and additional memory for the SmartLists.

Installing the SmartList To Go on the desktop requires 20MB free memory on your PC.

Installation

- 1** | The installation program will start automatically when you insert the SmartList To Go CD into your desktop CD-ROM drive, or open Microsoft Explorer, select the CD-ROM drive and double-click the file **setup.exe**.
- 2** | Follow the InstallShield Wizard instructions to install to your desktop.
- 3** | HotSync to install the application to your handheld device.

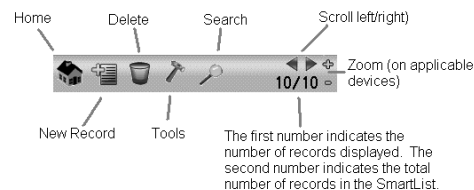
Launching

SmartList To Go on the handheld



To launch SmartList To Go on the handheld, click on the SmartList To Go icon from the application launcher. Once in SmartList To Go, you'll see a list of your SmartLists under the column titled SmartList. Tapping on one of the SmartLists will open that particular SmartList. The SmartList toolbar is described below.

SmartList To Go Toolbar



- **Home** - Returns you to the SmartList To Go Home Screen.
- **New Record** - Creates a new SmartList record.
- **Delete** - Deletes a SmartList record.
- **Tools** - Opens design functions for creating fields, forms, views, filters and lists.
- **Find** - Searches SmartList records by search word and field type.

Creating

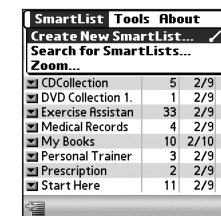
a SmartList

Handheld databases in SmartList To Go are called SmartLists.

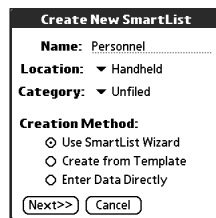
- 1| Tap on the SmartList To Go icon in the Applications Launcher on your device to open SmartList To Go.



- 2| To create a SmartList, tap on the **New SmartList** icon. You can also click on the SmartList To Go tab at the top of the screen to open the **Main Menu** and select **SmartList > Create New SmartList**.



3| The Create New SmartList screen will open.



4| Enter the **Name** of the SmartList in the field provided.

5| Enter the **Location** of where the SmartList will reside (either Handheld or Card, if available).

6| Apply a **Category**, if desired.

7| Choose from one of the three **Creation Methods** provided and select the **Next** button:

- Use SmartList Wizard. The SmartList Wizard allows you to enter fields in a simplistic manner. In the **Name** field enter a name for the field, such as "Title", and then choose the **Type** of field that it is, such as Text. Select the **Add** button and the field is added. Repeat the process for all fields that you wish to add. When finished adding fields, select the **Next** button.
- Create from Template. This creation method allows you to use an existing SmartList as a starting point for creating of a new SmartList. From the Choose List dropdown menu, simply choose an existing SmartList to be used as your starting point. After selecting a SmartList, you will also have an option to import the data from that SmartList.
- Enter Data Directly. This option opens the new SmartList directly into the Field Editor. You can add fields by selecting the **New** button in the Field Editor.

The Field Editor Screen


The Field Editor screen is where you to create, edit and delete fields.

To create a new field, follow these steps:

- 1| Select the New button to open the Single Field Editor.



- 2| Enter a Name for the new field and select a Type for the field.
For each field type you will notice a description of the field type in the box below Type. For a description of each field type, see the SmartList To Go Field Types section on page X.

- 3| Click on the Field Properties button  on the right side of the field type selected to open the Properties screen for that field type (if applicable). The controls in the Field Properties screen will vary depending upon the field type's characteristics. Some field types will not have a Field Properties button because they have no configurable characteristics. Configure the field's properties and return to the Single Field Editor screen.
- 4| Repeats Steps 1, 2 and 3 to continue creating as many fields as you require.
- 5| When you have created your fields, click the Done button in the bottom of the screen.

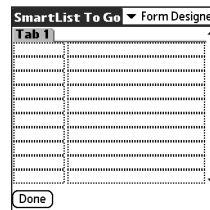
You have now created your fields. Next you need to design the form.

The Form Designer Screen

The Form Designer screen is your primary interface for configuring your SmartList's input and display form.

To open the Form Designer screen from the Field Editor screen, open the pull-down menu in the upper right corner of the screen and select **Form Designer**.

To open the Form Designer screen at any other time, open the **Main Menu** and select **Tools > Design Forms**.



Add Fields to a Form

When first opened, the Form Designer screen will display an empty form. To create your SmartList's input and display form, you will add the fields you created. Each line on a form can contain no more than one field and its label. The form labels appear in the left column of the form; you enter data into each field in the right column of the form.

To add a field to the form, follow these steps:

- 1| Click on the form line on which you would like the field to appear. This will open a pull-down menu with options to Add New Field, Add Label, Add Existing Field (with existing fields listed).
- 2| Select the name of the field you wish to add, or select Add New Field to open the Single Field Editor to create a new field.

The field is now added to the form. The field label will appear on the left column of the form, and the field's type will appear in parenthesis on the right column of the form. When you leave the Form Designer screen and begin to use this form for data entry, a blank line will appear in the right column instead of the field type. This blank line is where you will enter data.

Create or Modify Tabs in a Form

To create or modify tabs in the Form Designer screen, you must first plan out how you will group your fields on to tabs, how many tabs you will need and what you will name the tabs. Then tap on an existing **Tab** and choose **Edit Tabs**... from the pull-down menu. You can modify the tabs from this screen as follows:

- 1** | To add a tab, click on the **plus** button and enter a name for the tab in the **Add Tab** screen.
- 2** | To delete a tab, highlight the tab name you want to delete and choose the **minus** button.
- 3** | To reorder tabs, highlight a tab and choose the up or down arrow to reorder the tab accordingly.
- 4** | To rename a tab, highlight the tab you want to rename, and choose the rename symbol below the down arrow. Enter the new name.
- 5** | To delete all tabs, choose the **X** button. You may also delete all tabs in the Form Designer by tapping on a tab and choosing Delete Tabs from the popup menu.

Adjust layout of a Form


You can adjust the column widths to accommodate larger labels or provide more room for data entry.

To change column layout from the Form Designer screen, follow these steps:

- 1** | Click on the tab at the top of the screen to open the **Main Menu**, and select **Options > Resize Labels**. A vertical line will appear to indicate the separator between the two columns.
- 2** | Click on this line and drag to the left or right to change the columns to the desired widths. The vertical line will disappear automatically when you lift the stylus.

Records in your SmartList

To Add records to your SmartList, start from the List View screen and follow these steps:

- 1| Click on the **New Record icon** at the bottom of the screen.  This will open a blank record form. You designed this form when you created the SmartList.
- 2| Enter the appropriate data in the field's provided.
- 3| Click **OK** to add the new record, or click **Cancel** to abandon this record without adding it.

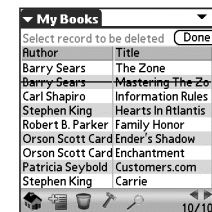
The new record is now created and will appear on the List View table.

To duplicate an existing record, start from the Record screen for that record and follow these steps:

- 1| Click on the tab at the top of the screen to view the **Main Menu** and select **Actions > Duplicate record**. This will open a new record form and automatically populate the fields with the same data as the original record.
- 2| If you wish to change one or more fields, do so.
- 3| Click **OK** to add the new duplicate record. Click **Cancel** to close the duplicate record without saving it.

To delete one or more records, start from the List View screen and follow these steps:

- 1| Click on the **Delete Record icon** at the bottom of the screen. A message that asks you to click the Done button when you are done deleting will appear at the top of the screen.



- 2| Click on the record you wish to delete. This will open a menu that allows you to continue deleting the record or cancel the deletion.
- 3| Select **Delete** to complete the deletion, and the SmartList To Go handheld app will delete the record and remove it from the List View table. Select **Cancel** to abort the deletion.

- 4| Repeat Steps 2 and 3 as often as necessary to delete all the records you wish to erase.
- 5| Click on the **Done** button that appeared at the top of your screen in Step 1. The filter and view menus, which disappeared when the Done button appeared, will reappear.

Sorting

records in a view

Records can be sorted in ascending and descending order. To sort records in a view, follow these steps.

- 1| Select a column heading on the SmartList view screen. The **Sort** pop-up menu appears.
- 2| Select the **Down** arrow to sort in Ascending order, or select the **Up** arrow to sort in descending order.

The SmartList view is sorted by column heading in ascending or descending order.

Assigning a password

SmartList To Go allows you to have six levels of security to protect your data from modification, design modification, beaming and copying.

To assign a password, follow these steps.

- 1**| Select a SmartList from the Home page.
- 2**| Select **Menu > SmartList > Security Settings** from the SmartList To Go drop-down menu.
The Security Settings dialog screen appears. The default is No Password.
- 3**| Select **Assigned** from the Security Settings pop-up menu.
- 4**| Enter a password in the Password window.
- 5**| Select **OK**.
- 6**| Re-enter the password for verification.
- 7**| Select **OK**.

Finding records

Scrolling through databases to find records and fields is time-consuming. Instead, you can search for a specific field entry with the Find function.

- 1**| Select the Find icon at the bottom of the SmartList view screen.
The Find dialog screen appears with the following options.
 - a. Find:** Enter a search word.
 - b. Look-in:** Enter a field to look for the search word.
 - c. Display:** Display the field in which the search word is found.
 - d. Match Case:** Check if search is case-specific.
 - e. Whole word Only:** Check for a whole word search.
- 2**| Select **OK**.
- 3**| The Matches screen finds all records that match the search criteria.
- 4**| Select **OK** to return to the SmartList view or **New Search** to conduct a new search.

Cloning a SmartList

Cloning makes a copy of a SmartList with or without existing records.

- 1**| Select **Clone** from the SmartList drop-down menu on the SmartLists Home screen. The SmartList Properties dialog screen appears.
- 2**| Highlight the SmartList name and replace it with another name.
- 3**| Select **OK**.
- 4**| Select **Yes** to copy if you wish to copy existing records to the new SmartList.
- 5**| The new SmartList appears in the Home screen.

How to sync a SmartList to the desktop

After creating a new SmartList on the handheld, perform a HotSync to copy the SmartList into the desktop application.

Finding more information

For more information on creating relational databases using DB Joins, DB Lookups, One-to-Many fields and Address Joins, refer to the SmartList To Go Handheld Reference Guide which is available in the SmartList To Go Program Group on your desktop (Start menu/Program Group/SmartList To Go).

For more information on using SmartList To Go for direct synchronization with MS Access, refer to the SmartList To Go Sync Manager help file in the program group on the desktop (Start menu/Program Group/SmartList To Go).

SmartList To Go field types

Field Type	Description
Text	Supports up to 254 characters
Integer	-32,768 to +32,767
Long	-2,147,483,648 to +2,147,483,647
Float	Supports up to three decimal points
List	Creates pre-defined field lists
Checkbox	Denotes a True or False statement
Date	Supports date values
Time	Supports time values
Expression	Supports specific record calculations
Memo	Supports up to 4,096 characters
Key	Displays the record internal key
DB Join	Joins two or more databases
DB Lookup	Displays values from joined databases
One-to-Many	Links a SmartList record to records in another SmartList
Address Join	Joins a SmartList record to the Palm Address Book
Address Lookup	Displays address values from the Palm Address Book
Radio Button	Supports up to eight single-choice fields
Image	Creates up to three image field formats
Conditional Expression	Support IF, THEN and ELSE conditions
Advanced Expression	Supports high-end functionality for mathematical and Boolean expressions.
Auto Incremental	Supports sequential numbering
SmartList To Go Plug-In	Supports plug-ins that expand functionality

About

our products and services

Use the following sources for additional information about DataViz products and services.

Company Web Site: www.dataviz.com

Support Web site: www.dataviz.com/support

Sales: www.dataviz.com/salesfaq



DataViz, Inc.
Merritt Corporate Woods
612 Wheelers Farms Road
Milford, CT 06460 USA

©2004 DataViz, Inc. and its licensors. All rights reserved.

109-QSBEN-0002
0204-853