



Version 4.1 Users Manual

Users Manual

SNAP! dcs Version 4.1

SNAP! dcs is a handheld data collection system.

This manual covers the primary points of what all the features are for and how to use them.

SNAP! dcs 4.1 Users Manual

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Table of Contents

| | |
|---|-----------|
| 1 Introduction and Overview | 2 |
| 2 Getting Started | 4 |
| 2.1 Minimum System Requirements | 4 |
| 2.2 Installing SNAP! | 4 |
| 2.2.1 Desktop Installation (SNAP! Client) | 5 |
| 2.2.2 Mobile Device Installation (SNAP! Mobile) | 5 |
| 2.2.3 iPhone/iPod Touch Installation (iSNAP!) | 5 |
| 2.3 Upgrading SNAP! | 5 |
| 2.4 SNAP! Terminology | 6 |
| 2.5 Data Types | 6 |
| 3 Using SNAP! | 8 |
| 3.1 Templates and Themes | 8 |
| 3.1.1 SNAP! Client | 8 |
| 3.1.1.1 Loading Templates/Themes | 8 |
| 3.1.1.2 Upgrading Templates | 9 |
| 3.1.1.3 Sharing Templates/Themes | 9 |
| 3.1.1.4 Deleting Templates/Themes | 9 |
| 3.1.2 SNAP! Mobile | 9 |
| 3.1.2.1 Loading Templates/Themes | 10 |
| 3.1.2.2 Upgrading Templates | 10 |
| 3.1.2.3 Deleting Templates/Themes | 10 |
| 3.1.3 iSNAP! | 10 |
| 3.1.3.1 Loading Templates/Themes | 10 |
| 3.1.3.2 Upgrading Templates | 11 |
| 3.1.3.3 Deleting Templates/Themes | 11 |
| 3.2 Cards and Data | 11 |
| 3.2.1 SNAP! Client | 11 |
| 3.2.1.1 Loading Cards | 11 |
| 3.2.1.2 Sharing Cards | 11 |
| 3.2.1.3 Creating, Editing and Viewing Cards | 12 |
| 3.2.1.4 Merging Cards | 13 |
| 3.2.1.5 Backup and Restore Cards | 13 |
| 3.2.1.6 Exporting Cards | 13 |
| 3.2.1.7 Deleting Cards | 13 |
| 3.2.1.8 Analyzing Card Data | 13 |
| 3.2.1.9 Printing Cards | 13 |
| 3.2.2 SNAP! Mobile | 14 |
| 3.2.2.1 Loading Cards | 14 |
| 3.2.2.2 Sharing Cards | 14 |
| 3.2.2.3 Creating, Editing and Viewing Cards | 14 |
| 3.2.2.4 Merging Cards | 15 |
| 3.2.2.5 Downloading Cards | 16 |

| | |
|--|-----------|
| 3.2.2.6 Backup and Restore Cards | 16 |
| 3.2.2.7 Deleting Cards | 16 |
| 3.2.2.8 Exiting | 17 |
| 3.2.3 iSNAP! | 17 |
| 3.2.3.1 Loading Cards | 17 |
| 3.2.3.2 Creating, Editing and Viewing Cards..... | 17 |
| 3.2.3.3 Downloading Cards..... | 18 |
| 3.2.3.4 Deleting Cards | 18 |
| | |
| 4 Using SNAP! Survey Wizard | 20 |
| | |
| 4.1 Single Story Surveys | 20 |
| 4.2 Multi Story Surveys | 21 |
| 4.3 Reports | 23 |
| 4.4 Import from .SW3 File | 23 |
| 4.5 Exports | 23 |
| 4.5.1 Export to TFM | 23 |
| 4.5.2 Export to Phoenix Pro | 24 |
| 4.5.3 Export to Cengea Forest | 24 |
| | |
| 5 Appendix A: Troubleshooting | 26 |
| | |
| 6 Appendix B: Technical Support | 28 |

Part

1

1 Introduction and Overview

SNAP! dcs is a handheld data collection system designed to make any typical field data collection form available in an electronic format on an MS Windows Mobile device or an iPhone / iPod Touch.

There are three parts to SNAP!:

- SNAP! Client: desktop software that stores card templates and makes them available to a mobile device, iPhone, or iPod Touch. Cards and corresponding data collected on the mobile device are imported to the desktop for storage, viewing, editing, analyzing, exporting, and printing.
- SNAP! Mobile: users load forms onto a MS Windows Mobile device from SNAP! Client. Data is collected and stored on the handheld, then exported to the Client.
- iSNAP!: users load forms onto an iPhone or iPod Touch from SNAP! Client through Dropbox (free, third-party online software). Data is collected and stored on the iPhone or iPod Touch, then exported to the Client via Dropbox.

Part

2

2 Getting Started

Setting up SNAP! involves the following steps:

1. Installing the desktop software
2. Installing the handheld software or iPhone/iPod Touch software
3. Creating themes (optional)
4. Importing card templates to the desktop
5. Sending the card templates to the handheld or iPhone/iPod Touch

2.1 Minimum System Requirements

Desktop Requirements:

- .NET Framework 3.5 (found at www.microsoft.com/downloads)
- Intel® Pentium® processor 400 MHz minimum (1GHz recommended)
- Windows XP or newer, Windows Server 2003 or 2008
- 96MB RAM minimum (256MB RAM recommended)
- Up to 500MB hard drive space may be required
- Microsoft ActiveSync or Windows Mobile Device Center
- Microsoft Excel (to run reports)

Handheld Requirements:

- .NET Compact Framework 3.5 (found at www.microsoft.com/downloads)
- Windows CE or Windows Mobile

iPhone/iPod Touch Requirements:

- iOS4 operating system
- iPod Touch requires wifi for syncing data with SNAP! Client

2.2 Installing SNAP!

To install SNAP!, you must first have some basic software installed on the desktop and on the mobile device (if you are using one):

1. ***Microsoft ActiveSync or Windows Mobile Device Center must be installed to connect your handheld to your PC.***

Windows Mobile Device Center for Windows Mobile (2003 or later) devices and Windows Vista or Windows 7:

<http://www.microsoft.com/windowsmobile/en-us/downloads/microsoft/device-center-download.aspx>

Microsoft ActiveSync for Windows CE or Mobile devices and Windows XP or earlier:

<http://www.microsoft.com/downloads/details.aspx?displaylang=en&FamilyID=7269173a-28bf-4cac-a682-58d3233efb4c>

Microsoft ActiveSync for Windows Mobile (2003 or later) devices and Windows XP or earlier:

<http://www.microsoft.com/windowsmobile/en-us/downloads/microsoft/activesync-download.msp>

2. ***.NET Framework 3.5 must be installed on the desktop:***

<http://www.microsoft.com/downloads/details.aspx?FamilyId=333325FD-AE52-4E35-B531-508D977D32A6&displaylang=en>

3. ***.NET Compact Framework 3.5 must be installed on the handheld (connect handheld to PC prior to downloading):***

<http://www.microsoft.com/downloads/details.aspx?familyid=e3821449-3c6b-42f1-9fd9-0041345b3385&displaylang=en>

Once these are installed, SNAP! can be installed on the [desktop](#) and [mobile device](#) and/or [iPhone/iPod Touch](#).

2.2.1 Desktop Installation (SNAP! Client)

SNAP! Client installation on PC:

1. Run the installer and follow the on-screen instructions from <http://www.jrpltd.com/Support/Updates.aspx?Product=SNAP>.
2. If this is the initial installation, run SNAP Client and register the program by entering your Registration Code. The PC must be connected to the internet in order to register. You will not be able to unregister a PC once registered, so please ensure you register the correct PC.

**** Note:** *Templates and cards are stored in the Program Data\JRP\SnapClient4 location by default. If you wish to store them elsewhere, you can specify a different location (ex. C:\My Documents) in a sharedfolder.txt document in the SnapClient installation folder (generally under C:\Program Files\JRP Solutions).*

2.2.2 Mobile Device Installation (SNAP! Mobile)

SNAP! Mobile installation on a Windows Mobile or CE handheld device:

1. Install SNAP! Client on the PC first.
2. For new installations, go to <http://www.jrpltd.com/Support/Updates.aspx?Product=SNAP> and download the 'Download Version for Mobile Device'. This will download a .CAB file.
3. Ensure that your mobile device is connected and synchronized with your desktop.
4. Locate the downloaded SnapMobileSetup.CAB file on your computer, copy it, and paste it into the main directory of your mobile device (not the storage card).
5. On the mobile device itself, locate the SnapMobileSetup.CAB file and select it. This will install SNAP onto your handheld.
6. For upgrades, open SNAP! on the desktop and choose the Mobile Device menu, use the **Install to Device button** in the bottom left, and follow the prompts on the mobile device.
7. You can now access SNAP! from your handheld by either going to the Programs menu or directly off the Start menu.
8. To load card templates onto your handheld, review '[Loading Templates / Themes onto SNAP! Mobile](#)'.

2.2.3 iPhone/iPod Touch Installation (iSNAP!)

From the App Store on your iPhone or iPod Touch, search for 'iSNAP by JRP Solutions' and install the application (you will need an Apple ID).

To load templates and cards onto your device, refer to '[Loading Template / Themes onto iPhone / iPod Touch](#)'.

2.3 Upgrading SNAP!

SNAP! Client upgrading on PC:

1. Run the installer and follow the on-screen instructions from <http://www.jrpltd.com/Support/Updates.aspx?Product=SNAP>.

SNAP! Mobile upgrading on a Windows Mobile or CE handheld device:

1. Ensure that your mobile device is connected and merge the handheld data with the desktop data.
2. For upgrades, open SNAP! on the desktop and choose 'Install to Mobile Device' from the Mobile Device menu and follow the prompts on the mobile device.

3. You can now access SNAP! from your handheld by either going to the Programs menu or directly off the Start menu.
4. To load card templates onto your handheld, review '[Loading Templates / Themes onto SNAP! Mobile](#)'.

iSNAP! upgrading on iPhone or iPod Touch:

1. Check the App Store for updates to 'iSNAP by JRP Solutions' and install if available.

2.4 SNAP! Terminology

Template – the format for entering and reporting data; a particular type of card



Theme – a user-customized template for entering and reporting data

Cards – the container for some data collected; a card created using a template

Data – all data in the database or card

2.5 Data Types

There can be several different types of data entry fields available on each card type:

- **Checkbox** - check the box if applicable (boolean field)
- **Date** – drop down calendar to select date
- **Fixed Drop Down** – select from a pull down list of codes, no manual entry
- **Floating Point** – decimal number field, indicated in green
- **Formula** – automatically calculated field
- **Free Text Drop Down** – select from a pull down list of codes or manual entry
- **General Text** – manual entry text
- **Integer** – whole number field, indicated in blue
- **Label** – displays a heading without the option to collect data
- **Multi Select** – select multiple options from a list
- **Tally** - select ▲ or ▼ **buttons** to increase or decrease the count (cannot go below zero), shown in green
- **Calculated** - not a data entry field, shown in green
- **Y N NA NC** – checklist, select Y / N / na / X (clear) – can use keyboard 'y', 'n', 'x', 'c' or mouse
- **Comments, Sketch, Voice Clips, Attachments, GPS** – select the  beside the field name to enter comments, draw a sketch, record an audio clip, add attachments, or to set GPS coordinates (if connected)
- **Mandatory** – any mandatory fields are in yellow
- **Information / Help** – select the  beside the field name for more information

Part



3 Using SNAP!

SNAP! Client is desktop software that stores [card templates](#) and their themes and makes them available to a mobile device. Cards and corresponding data collected on the mobile device are imported to the desktop for storage, viewing, editing, analyzing, and printing.

3.1 Templates and Themes

Templates are the blank forms for collecting data. While JRP Solutions builds the initial card templates, users can edit some parts of the templates to create themes and then share these with other users. This is very useful when different codes are needed in the code lists, or different terminology is used.

To edit a template, you must have it selected, then choose the Themes menu and 'Create a new [template name] Theme based on the Default Template'. If you have a theme already selected, you can create another theme based on it. Once a theme has been created, it cannot be edited. This is to prevent shared themes from becoming different between users. Old themes can be deleted if selected first.

Templates and themes are distributed by [exporting](#) and [importing](#) .SnapPkg files. They are loaded onto SNAP! Client where they can be sent to [SNAP! Mobile](#) or [iSNAP!](#) for data collection in the field.

To select a card template or theme on the desktop, use the **Change Template button**. On the mobile device, use the Current Template pull down list to select the template or theme. On the iPhone or iPod Touch, select a project (which is associated with a specific template).

The following fields can be edited to create a theme:

- **Section** - the Text, Fill, and Border colors for the Header Text (on the desktop only) can be edited
- **Long Name** – the field name that appears when using the Cards tab on the desktop
- **Short Name** – the field name that appears on the handheld and the Analysis tab on the desktop
- **Required on Handheld** – select if this field is mandatory
- **Users Can Set Default Value on Handheld** – means users can provide default data on the handheld that will be used on every new card created
- **Form View Formatting** – specify label and value formatting (justification, bold, italic, font size)
- **Decimal Places** – specify new decimal places for floating point numbers fields
- **Hide Border** – hide the border around a field
- **Help Text** – provides extra information to users on the handheld
- **Code List** – lets you edit and reorder the codes available in a pull down list

3.1.1 SNAP! Client

This section explains how to [load](#), [upgrade](#), and [delete](#) templates and themes to/from your desktop.

3.1.1.1 Loading Templates / Themes

To load card templates and themes onto the desktop:

1. In SNAP! Client, select 'Import' > 'from SNAP Data Package' from the File menu
2. Navigate to the appropriate .SnapPkg file(s) that you received from JRP Solutions or another user and 'Open'
3. The default card template or theme will be copied into the Template list

3.1.1.2 Upgrading Templates

Occasionally JRP Solutions sends out template changes. Previous templates are not overwritten, but instead new templates are created and distributed (with a date stamp). Card data and themes (customizations) from older templates can be migrated forward into a new template assuming the template has not changed dramatically.

Please ensure that all necessary data has been merged from the handheld to the desktop before upgrading.

To install the new template:

1. Choose 'File' > 'Import' > 'from .SNAP Data Package'
2. Navigate to the new .SnapPkg file(s) and 'Open'
3. The new default card template or theme will be copied into the Template list

To migrate existing cards into a new template:

1. [Backup](#) the cards to be migrated into a .SnapPkg file (this also backs up the older template/theme)
2. Select the old template from the **Change Template button**
3. From the Edit menu, choose 'Migrate Multiple Cards' and select the new template from the list
4. Select the cards you wish to migrate, and choose 'OK'

If there were any themes created on the old template that need to be used in the new template:

1. Choose 'Edit' > 'Migrate Theme From Other Template' and select the theme you want
2. Select the theme from the **Change Template button**

3.1.1.3 Sharing Templates / Themes

Themes can be created which allow a user to customize certain aspects of a template (colors, field names, label and value formatting, help text, and code lists). Once a theme is set up for a particular purpose, it should be shared with all of the users involved in collecting data. This will allow them to all use the same code lists and other customizations, keeping the data more standardized.

To share card templates and themes with other users:

1. In SNAP! Client, select 'Export' > 'Export Cards as SNAP Package' from the File menu
2. If there are any cards you wish to include with the template / theme, select them
3. Choose a name and location to save the .SnapPkg file
4. Distribute this file to other users

3.1.1.4 Deleting Templates / Themes

Please ensure that you backup (export .SnapPkg) the template / theme and its cards on the desktop before deleting.

To delete a template from the desktop, the related card data must be [deleted](#) first. Once all cards are deleted, use the Themes menu to 'Delete Template'.

To delete a theme from the desktop, make sure it is selected, then use the Themes menu and choose 'Delete [theme name]'.

3.1.2 SNAP! Mobile

This section explains how to [load](#), [upgrade](#), and [delete](#) templates and themes to/from your mobile device.

3.1.2.1 Loading Templates / Themes

To load card templates onto a handheld:

1. Ensure your mobile device is connected to your computer
2. In SNAP! Client, select the Mobile Device menu
3. Select the template, themes, and cards you would like to add to the handheld. You have the option of selecting each item individually, or you can use the buttons at the bottom to do bulk functions.
4. In SNAP! on the handheld, select the **Reload button** in the bottom right-hand corner of the screen to see the new template and/or themes

3.1.2.2 Upgrading Templates




Once the templates have been upgraded on SNAP! Client, they can be sent to the mobile device. Please ensure that all necessary data has been merged from the handheld to the desktop before upgrading.

To install the new template:

1. Select the Mobile Device menu
2. Select the new template, theme and associated cards you wish to put on the mobile device
3. You can also select which template(s) / theme(s) you wish to [remove](#) from the device (this will help clean up the device and prevent data being collected on an older template)
4. Select the **Reload button** on the handheld to see the new template / theme

3.1.2.3 Deleting Templates / Themes

To delete a theme from the mobile device, select it, then using the Options menu, go to the theme name and choose 'Remove Theme'.


To remove a template / theme from the mobile device, connect to the desktop and select the Mobile Device menu. Themes with a checkbox  under Status and an  under Action can be removed by selecting them. You can remove more than one at a time by using the  **button** at the bottom.


3.1.3 iSNAP!

This section explains how to [load](#), [upgrade](#), and [delete](#) templates and themes to/from your iPhone or iPod Touch.

3.1.3.1 Loading Templates / Themes

To load templates and cards onto your device, you will need to create a Dropbox account, upload cards from the desktop, then download them onto your iPhone / iPod Touch:

1. To create a Dropbox account, go to www.dropbox.com and choose 'Log in' from the top right corner of the screen. Select the 'Create an account' link and follow the directions. You do not need to download Dropbox.
2. Using SNAP! Client, select the template or theme that contains the cards you wish to send to the iPhone or iPod Touch.
3. Select 'Manage Projects' from the Dropbox menu and enter your Dropbox login information.
4. For new templates or projects use the **New Project button** to create a project to upload cards into.
5. To add cards to an existing project, select the project from the list and use the **Add Cards button**.
6. Select which cards you wish to upload to Dropbox and make available to iSNAP!.
7. The first time you run iSNAP!, choose 'Import from Dropbox' from the Import Options section and you will be asked to enter your Dropbox account information.
8. Subsequent use of iSNAP!, will automatically show the projects already on your device. To add new templates or cards, use the  **Dropbox button** in the bottom right corner of the screen.

9. You will see the project(s) available under the Dropbox section. Tap a project to download it to your device.
10. To download projects from another Dropbox user account, select the  **Dropbox button**, then the **Change User button** and login with the user's credentials.

3.1.3.2 Upgrading Templates

Once the templates have been upgraded on SNAP! Client, they can be sent to the iPhone or iPod Touch via [Dropbox](#). Please ensure that all necessary data has been merged from the device to the desktop before upgrading. If a theme has been updated, sync the old one first, [delete the theme](#) off the device, then [load](#) the new one.

3.1.3.3 Deleting Templates / Themes

To delete templates / themes / cards from the iPhone or iPod Touch, you first need to sync with Dropbox. Once synced, the project will get a green check mark beside it. Swipe your finger to the left or right on the project and the check mark will become a **Delete button**. Use this to delete the project (which will delete all related cards).

3.2 Cards and Data

Cards are created from templates and are used to store field data. Cards can be transferred between the desktop and the handheld, or the desktop and an iPhone or iPod Touch. They can be [analyzed](#), [printed](#), and [exported](#) to MS Excel.

3.2.1 SNAP! Client

This section explains how to [load](#), [create](#), [edit](#), [view](#), [merge](#), [backup and restore](#), [export](#), [delete](#), [analyze](#), and [print](#) cards and data on your desktop.

For instructions on how to send or retrieve cards from a mobile device, please refer to the [SNAP! Mobile](#) > [Loading Cards](#) and [Importing Cards](#) sections.

For instructions on how to send or retrieve cards from an iPhone or iPod Touch, please refer to the [iSNAP!](#) > [Loading Cards](#) and [Importing Cards](#) sections.

3.2.1.1 Loading Cards

There are two options for importing cards under the 'File' > 'Import' menu:

1. from Excel sheet - allows users to specify an import from an Excel spreadsheet
2. from SNAP Data Package - users can import cards contained within a [data package](#) created from SNAP! 3.0 and newer

**** IMPORTANT NOTE:** *If you are starting a database by importing a MS Excel file, and require multiple people to have access to the file, it is important that ONE person import the Excel file, and then export a .SnapPkg file to distribute to the others. This will ensure all users are able to sync with each other.*

3.2.1.2 Sharing Cards


Cards can be shared with other users by exchanging SNAP Data Packages (.SnapPkg).

To share cards with other users:

1. In SNAP! Client, select 'Export' > 'Export Cards as SNAP Package' from the File menu
2. Select which cards you wish to include
3. Choose a name and location to save the .SnapPkg file
4. Distribute this file to other users
5. On the receiving end, users will use 'Import' > 'from SNAP Data Package' from the File menu




**** IMPORTANT NOTE:** *If you are starting a database by importing a MS Excel file, and require multiple people to have access to the file, it is important that ONE person import the Excel file, and then export a .SnapPkg file to distribute to the others. This will ensure all users are able to sync with each other.*

3.2.1.3 Creating, Editing and Viewing Cards



Use the **Filter button**  to find a card or group of cards to view. You can sort the cards for easier viewing. If there are filters that you use repeatedly, create a favorite for quicker filtering. The **Filter button** will turn green when a filter is applied.

You can group cards by selecting any field from the main card section. This will change the way the cards appear in the navigation tree on the left.





To create new cards (data):

1. Select a theme or template using the **Change Template button**.
2. Select 'New Card' from the Edit menu or use the  **New Card button**.
3. If you already have a card you would like to copy, select it and choose 'Clone' from the Edit menu.
4. Give the new card a name.
5. Fill in the data fields on the right-hand side of the screen.
6. To add comments or attachments, right-click a field and 'View Additional Information'. If additional information already exists, there will be a red triangle in the upper right corner of the field.
7. You can make the card appear smaller or larger by selecting 'Zoom' from the Options menu or use the  **Zoom button**.
8. Hide sections by deselecting them in Display Options under the Options menu or use the  **Display Options button**. You can also choose to show comments in Form View. These will appear at the bottom of the section they belong to.

To create new sections:

1. Sections that can have multiple records added are called repeatable sections.
2. To add new sections, use the Section View tab.
3. After choosing a repeatable section, select the  **Add New button** that appears above the card.
4. Fill in the data.
5. To delete a section, select it and use the  **Delete button**.


To view / edit cards:

1. Select the card template you wish to use.
2. Select the specific card you want to view.
3. This will show you all the data in an editable format under the main Cards tab.
4. If you wish to rename the card, use the Edit menu and choose 'Rename' or use the  **Rename button**.
5. You may see some fields with a red triangle in the upper right corner which indicates that there is additional information (comments, voice clip, attachment, or sketch) for that field. You can right-click the field and select 'View Additional Information', or use the tabs along the top of the card to view all of the additional information contained in the card.
6. Export data to Excel by using the  **Excel button** or File > Export menu.
7. Refresh the data by using the  **Refresh button**.
8. If you need to move individual repeatable sections to another parent section, select the section to be moved using the Section View, choose the  **Move To button**, and select the new section from the drop down list.

3.2.1.4 Merging Cards

Cards can be merged together on the desktop (ie. Card 1 => Card 2). This will take the fixed data from the first card and update the second card, it will append any repeatable sections to second card, the second card will keep its name, and the first card will be deleted.

To merge cards on SNAP! Client:

- click and drag the first card you want to merge onto the destination card, or
- use the  **Merge Cards button** and select the source and destination cards

3.2.1.5 Backup and Restore Cards

To backup and restore cards on the desktop:

Use Snap Package (.SnapPkg) [exporting](#) and [importing](#) to backup and restore data. This method also makes a backup of your templates and themes that you export.

3.2.1.6 Exporting Cards

To export cards, use the 'Export Cards as Snap Package' option from the 'File' > 'Export' menu. Select the cards to be exported and choose 'OK'. Data can be exchanged between users with this method.

To export to MS Excel, use the Excel options under the 'File' > 'Export' menu.


3.2.1.7 Deleting Cards

Completed cards can be deleted from SNAP! Client. Please ensure that you no longer require this data before deleting it as there is no way to retrieve it later. To backup your data before deleting, [export a Snap Package](#).

To delete cards (data) from the desktop:





1. To remove a single card, select it from the tree and choose 'Delete [card name]' from the Edit menu
2. To remove multiple cards, choose 'Delete Multiple Cards' from the Edit menu, then select the cards from the list

To delete card sections from the desktop:

1. Using the Section View tab, select the appropriate card from the tree
2. Choose the section you wish to delete, then use the  **Delete button** at the top of the card

3.2.1.8 Analyzing Card Data

Use the Analysis tab for compiling card data:

- Select multiple cards from the list down the left hand side
- Use  Display Options to select the sections and fields to compile, the number of columns to freeze for scrolling, the column header height, and whether or not you wish to see statistical calculations
- Use the  **Run Report button** to see a summary of the data
- Use the  **Chart Data button** to see the data represented in either a bar or scatter chart
- Use the  **Excel button** to export the resulting data to MS Excel
- Use the Statistics tab on the bottom of the screen to show a statistics sheet (SNAP! automatically calculates a Count, Sum, Min, Max, Mean, Confidence Interval (90), and Standard Deviation on the data)

3.2.1.9 Printing Cards

There are several options for printing data under the File menu:

- **Print** – prints the currently selected card




- **Preview** – shows you a sample of what the printout will look like
- **Print Multiple Cards** – allows you to print multiple cards at once
- **Page Setup** – allows you to set page size and orientation, printer, margins, etc.

3.2.2 SNAP! Mobile

This section explains how to [load](#), [share](#), [create](#), [edit](#), [view](#), [merge](#), [download](#), [backup and restore](#), and [delete](#) cards and data on your mobile device.

3.2.2.1 Loading Cards

To send cards to the mobile device:

1. Using SNAP! Client, select the Mobile Device menu
2. In the 'Cards' section, select the card(s) you wish to add to the mobile device. Cards marked with a  status only exist on the desktop and can be selected to  upload them to device. If there are several that are awaiting to be uploaded, you can upload all of them at once by selecting the  **button** at the bottom.
3. The selected card(s) will appear on the mobile device (after using the **Reload button**) where they can be edited and sent back to the desktop

**** Notes:**

- *Handheld data will always overwrite desktop data. For this reason it is important to remove completed cards from the handheld.*
- *If you delete any sections from a card on the handheld, they will still exist on SNAP! Client even after syncing. You will need to delete the sections from the card on SNAP! Client or delete the entire card from the desktop before syncing it from the handheld.*
- *Any populated data fields will replace blank/empty data fields during sync.*
- *Desktop comments will overwrite handheld comments.*
- *If edits are made on the desktop that need to be reflected on the handheld, the card should be removed from the handheld first, then synced back onto it.*

3.2.2.2 Sharing Cards

You can share cards with other MS Windows Mobile device users if you have Bluetooth enabled handhelds.

To setup the Bluetooth connection between handhelds, go to 'Settings' > 'Connections' on the handhelds. On older handhelds you will select the "Beam" icon and ensure that 'Receive all incoming beams' is checked on. On new handhelds you will select 'Bluetooth' > 'General' or 'Bluetooth' > 'Mode' and ensure that Bluetooth is turned on. If you have these additional options available, check them on:

- allow other devices to connect
- other devices can discover me










To share cards with other mobile devices:

1. Ensure the receiving handheld has the same card template loaded onto it.
2. On the receiving handheld, with the card template selected, go to 'Options' > [Card Name] > 'Receive [Card Name] Cards'.
3. On the sending handheld, with the card selected, go to 'Options' > 'Card:xxx' > 'Send'

3.2.2.3 Creating, Editing and Viewing Cards

SNAP! Mobile includes several features that allow you to navigate the sections easily. These functions and more are also found under the Options menu in the bottom left corner.

To create, edit and view cards (data):

1. Select the Template or Theme you wish to use from the pull down list under 'Current Template'.
2. Select the  box beside '***CREATE NEW CARD***' to create a new card, or an existing card name to edit. A new card's name is defaulted to "New Card". You can edit this to something more recognizable to distinguish it from other cards.
3. The  **Edit button** allows you to enter or view data within the current section or card.
4. The  **Drill button** allows you to see the section(s) within the current section, going further into the card.
5. The  **Up button** moves you back up to the parent section.
6. To create a new repeatable section, use the Options menu, choose the section and select 'Add New'. Alternatively, you can click and hold the section name, then choose 'New'
7. The  **Expand** and  **Collapse buttons** allow you to show or hide repeatable sections.
8. For repeatable sections, you can enter and/or view data in a grid by using the Options menu or click and hold the section name, then choose 'Edit in Grid'. The columns are resizable and the headings have descriptions if you click on them.
9. Sections with a  **Summary button** beside them indicate a non-editable summary section. These sections generally calculate values and display results from other sections.
10. Any sections that are repeatable can also be deleted using the Options menu.
11. Some fields may have minimum and/or maximum values set. If the number you have entered falls outside this range, you will receive a message upon pressing 'Done' to exit the screen.
12. Some fields are calculated as you enter data into related fields.
13. Fields that are mandatory are in bold and highlighted in yellow. If you have not filled them in, you will be notified upon selecting 'Done'.
14. For date fields, you can use the drop down calendar to select a date. For today's date, click and hold the date field and select 'Today...'. To clear a date, click and hold the date field and select 'Clear...'
15. Every field has an  **Additional Information button** beside it. Select this button to include additional information (comment, voice clip, attachment, or sketch) for that field. The button turns green when it contains information.
16. Some fields have a 'Set GPS Latitude' or 'Set GPS Longitude' option under the Additional Information. To use this, please ensure that GPS is turned on.
17. Some fields have a  **Help button** beside them. Select it to access the help text and hints for data collection.
18. The Save option in the bottom right corner allows you to 'Save' your changes to the card or 'Save & Close' the card.

To setup default data to avoid repetitious entry:

1. On the Handheld, select a Template or Theme, then choose the Options menu from the bottom left-hand corner of the screen, and 'Edit Defaults'.
2. Fill out the fields that you would like to be defaulted on every new card you create (note: the defaulted data can be edited in the card).

3.2.2.4 Merging Cards




On the handheld, you can merge cards together (ie. Card 1 => Card 2). This will take the fixed data from the first card and update the second card, it will append any repeatable sections to second card, the second card will keep its name, and the first card will be deleted.




To merge cards on SNAP! Mobile:

- at the Current Template screen, choose the first card you want to merge, then 'Options' > 'Card: name' > 'Merge into' > and choose the destination card.

3.2.2.5 Downloading Cards

While a handheld is connected, you have the option to select the Mobile Device menu on the desktop.

Any cards that are out of sync with the desktop will be indicated with a  status. Select the card to sync it , or select the  **Sync button** at the bottom to sync all cards at once. Any changes made on the handheld will be reflected on the desktop, however, any changes made on the desktop will be overwritten by the handheld. For this reason, it is important to remove completed cards from the handheld.

New cards created on the handheld will be indicated by a  status showing that it only exists on the handheld. Select the card to download  it to the desktop, or use the  **button** at the bottom to download all new cards at once.

** Notes:

- *Handheld data will always overwrite desktop data. For this reason it is important to remove completed cards from the handheld if anyone plans on making edits to the data on the desktop.*
- *If you delete any sections from a card on the handheld, they will still exist on SNAP! Client even after syncing. You will need to delete the sections from the card on SNAP! Client or delete the entire card from the desktop before syncing it from the handheld.*
- *Any populated data fields will replace blank/empty data fields during sync.*
- *Desktop comments will overwrite handheld comments.*
- *If edits are made on the desktop that need to be reflected on the handheld, the card should be removed from the handheld first, then synced back onto it.*

3.2.2.6 Backup and Restore Cards

To backup cards (data) on the handheld:

From the main template list, select 'Options' > 'Backup...', then select the template you wish to backup from the list. The first time you backup, you will be prompted to choose a location for a backup folder. If you wish to change this later, you can select 'Options' > 'Change Backup Folder' and select a new location.

To restore a backup on the handheld:




From the main template list, select 'Options' > 'Restore', then select the backup folder. You will be prompted for which cards to restore.

3.2.2.7 Deleting Cards

Completed cards can be deleted from SNAP! Mobile. Please ensure that you no longer require this data before deleting it as there is no way to retrieve it later.

To delete cards (data) from the handheld:

OPTION 1 - *If your handheld is connected to your PC, you can use SNAP! Client to delete cards from the handheld:*

1. Select the Mobile Device menu
2. In the Cards section, select the cards that are synced  and can be removed  that you wish to delete, or select the  **button** at the bottom of the screen.
3. You can also remove the Template and/or Theme associated with the cards by choosing them under the Templates section

OPTION 2:

1. On the handheld, select the card from the main SNAP! window
2. Choose 'Options...Card:xxx...Delete' from the bottom left-hand corner of the screen

3. Follow the onscreen instructions

3.2.2.8 Exiting

To properly close SNAP! on the handheld, choose 'Options... Close SNAP!' from the main screen. If you use the 'X' in the upper right-hand corner, SNAP! will still be running in the background.

3.2.3 iSNAP!

This section explains how to [load](#), [create](#), [edit](#), [view](#), [download](#), and [delete](#) cards and data on your iPhone or iPod Touch.

3.2.3.1 Loading Cards




The process for loading cards onto iSNAP! is the same for loading templates and themes. Please refer to the iSNAP! > [Loading Templates / Themes](#) section for more information.

**** Notes:**

- *Handheld data will always overwrite desktop data. For this reason it is important to remove completed cards from iSNAP.*
- *If you delete any sections from a card on iSNAP, they will still exist on SNAP! Client even after syncing. You will need to delete the sections from the card on SNAP! Client or delete the entire card from the desktop before syncing it from iSNAP.*
- *Any populated data fields will replace blank/empty data fields during sync.*
- *Desktop comments will overwrite handheld comments.*

3.2.3.2 Creating, Editing and Viewing Cards

To create, edit and view cards (data):

1. Select the Project you wish to use from the list under 'Please Select a Project'.
2. Select the  **New Card button** in the top right to create a new card, or an existing card name to edit.
3. The  **Drill button** allows you to enter or view data within the section and see other section(s) within it. The  **Drill button** with two arrows indicates a repeatable section.
4. The **Back button** moves you back up to the previous section.
5. To create or delete a repeatable section, use the '+' and '-' **buttons** in the bottom left of the repeatable section window.
6. For repeatable sections, you can enter and/or view data in a grid by using the **Grid button** in the bottom right of the repeatable section window.
7. Some fields may have minimum and/or maximum values set. If the number you have entered falls outside this range, it will appear in red.
8. Some fields are calculated as you enter data into related fields.
9. Fields that are mandatory are highlighted in yellow. If you have not filled them in, you will be notified upon selecting 'Done'.
10. Every field has an option for Attachments below it or by using the the paper clip icon in the top right. This feature allows you to include additional information (pictures, voice recordings, sketches, or comments) for any field.
11. Some fields have a 'Set GPS Latitude' or 'Set GPS Longitude' option. To use this, please ensure that Location Services are turned on for iSNAP in your iPhone or iPod settings.
12. Some fields have helpful hints below them. This information can be setup in Theme.
13. The Save option in the top right corner allows you to save changes to the card and close it.

To setup default data to avoid repetitious entry:

1. Certain fields have a 'Default Value' option. When you select the field to fill it in, there will be an option at the bottom to 'Set Default Value'. Whatever you have entered into the field now becomes the default value for every new card.
2. You can overwrite the value and set a new default value at any time.

3.2.3.3 Downloading Cards

To import cards from iSNAP to SNAP! Client, use the  **Dropbox button** on the iPhone or iPod Touch. Choose the project you wish to upload to Dropbox. You will have the option to send just your changed cards, or sync everything.

Both options will automatically import any new cards created on iSNAP for the project specified. The data from iSNAP will be merged into any matching cards on Dropbox.

**** Notes:**

- *Handheld data will always overwrite desktop data. For this reason it is important to sync only 'My changed cards' from iSNAP.*
- *If you delete any sections from a card on iSNAP, they will still exist on SNAP! Client even after syncing. You will need to delete the sections from the card on SNAP! Client or delete the entire card from the desktop before syncing it from iSNAP.*
- *Any populated data fields will replace blank/empty data fields during sync.*
- *Desktop comments will overwrite handheld comments.*

3.2.3.4 Deleting Cards

To delete templates / themes / cards from the iPhone or iPod Touch, you first need to sync with Dropbox. Once synced, the project will get a green check mark beside it. Swipe your finger to the left or right on the project and the check mark will become a **Delete button**. Use this to delete the project (which will delete all related cards).

Part

4

4 Using SNAP! Survey Wizard

There are currently two templates for SNAP! Survey Wizard:

- [BC SURVEY - Single Story](#)
- [BC SURVEY - Multi Story](#)

These two templates are based on the BC Silviculture Survey Procedures from April 1, 2011.

When using the Survey Wizard templates, three new tabs appear: [Reports](#), [Imports](#), and [Exports](#).

4.1 Single Story Surveys

The BC SURVEY - Single Story template allows you to create and record survey card data in the field, download it to the desktop, [report](#) it, share it, then [export](#) it to Excel, Cengea (Genus), TFM, and Phoenix.

The template was designed based on the BC Silviculture Survey Procedures and contains the following sections:

- Block
- External Block Data
- Strata
 - Site Description
 - Silviculture Standards
 - Species Standards
 - General Site Information
 - External Stratum Data
 - Plots
 - Species Tallies
 - Pest Data
 - Brush Data
 - Stocking Summary (breakdown of WS, FG, TS, Ages, and Heights by species)
 - Pest Summary (breakdown of pest incidence by species)
 - Brush Summary (breakdown of brush heights by species)
 - WS Statistical Calculations
 - FG Statistical Calculations

Any of these sections can be hidden on the desktop if you do not wish to use them.

These important fields should be reviewed and the data collected (depending on the end purpose):

| Section | Field | Required for: | |
|---------------------|-----------------------------|--|---------------------------------------|
| Block | Licence | Export to Cengea (Genus) | |
| | CP Number | | |
| | Block | | |
| | Field Finish Date | | |
| | Survey Objectives* | | *must match Activity Name in Genus |
| | Inventory Label Source** | | **used to produce the Inventory Label |
| External Block Data | Division ID | Export to TFM | |
| | External Unique Activity ID | | |
| Strata | Stratum Name | Exports and reports | |
| | Survey Status | Exports | |
| | Stocking Status | Silviculture label, export to TFM, reports | |

| | | |
|------------------------|---|---|
| Site Description | Silv Site Index | Silviculture label, exports |
| | Inv Site Index | Inventory label, exports |
| | SI Source | Silviculture and inventory labels, exports |
| Silviculture Standards | Target SPH | Calculating M Values for reports and exports |
| | Plot Multiplier | Calculating stems per hectare for reports and exports |
| Species Standards | Tree Species | Determining WS & FG SPH versus WS & FG preferred SPH for reports and exports |
| | Preferred | |
| | Acceptable | Calculating total conifers/ha for reports and exports |
| | Coniferous | |
| External Stratum Data | Inv Status | Exports |
| | Inv Type | |
| | Silv Status | |
| | Silv Type | |
| | Export FG #s? | Exporting FG versus WS numbers for reports and exports |
| Plot | Plot Name | Calculating # of plots for reports and exports |
| | Total Trees by Layer (only if recording Inv Label % by species) | Calculating TS SPH, TS%, inventory label for reports and exports |
| Species Tallies | Tree Species | Determining WS, FG, and TS SPH, species % breakdowns, silviculture and inventory labels for reports and exports |
| | Well Spaced | |
| | Free Growing (if FG Survey) | |
| | Total Trees (if not recording Inv Label %) | Determining TS SPH, TS%, inventory label for reports and exports |
| | Inv Label % (if not tallying total trees by species) | |
| | Sample Ages and Heights in sample plots | Creating silviculture and inventory labels for reports and exports |
| Pest Data | all fields if pest is recorded | Calculating % host trees affected for reports and exports |
| Brush Data | all fields if brush is recorded | Calculating average % cover and heights for reports and exports |

4.2 Multi Story Surveys

The BC SURVEY - Multi Story template allows you to create and record survey card data in the field, download it to the desktop, [report](#) it, share it, then [export](#) it to Excel, TFM, and Phoenix.

The template was designed based on the BC Silviculture Survey Procedures and contains the following sections:

- Block
- External Block Data
- Strata
 - Site Description
 - Silviculture Standards (Layers 1,-4)
 - Species Standards
 - General Site Information
 - External System Data
 - Plots

- Layer 1-4 Species Tallies
- Layer 1-4 Pest Data
- Brush Data
- WS Summary (summary of WS sph by layer)
- FG Summary (summary of FG sph by layer)
- Inv Summary (summary of Total Trees sph and Total Conifers sph by layer)
- Stocking Layer 1-4 (breakdown of WS, FG, TS, Ages, Heights by species by layer)
- Pest Layer 1-4 (breakdown of pest incidence by species by layer)
- Brush Summary (summary of brush heights by species)

Any of these sections can be hidden on the desktop if you do not wish to use them.

These important fields should be reviewed and the data collected (depending on the end purpose):

| Section | Field | Required for: | |
|------------------------|---|---|--|
| Block | Licence | Export to Cengea (Genus) | |
| | CP Number | | |
| | Block | | |
| | Field Finish Date | | |
| | Survey Objectives* | | *must match Activity Name in Genus |
| | Inventory Label Source** | | **used to produce the Inventory Label |
| External Block Data | Division ID | Label | |
| | External Unique Activity ID | Export to TFM | |
| Strata | Stratum Name | Exports and reports | |
| | Survey Status | Exports | |
| | Stocking Status | Silviculture label, export to TFM, reports | |
| Site Description | Silv Site Index | Silviculture label, exports | |
| | Inv Site Index | Inventory label, exports | |
| | SI Source | Silviculture and inventory labels, exports | |
| Silviculture Standards | Target SPH | Calculating M Values for reports and exports | |
| | Plot Multiplier | Calculating stems per hectare for reports and exports | |
| Species Standards | Tree Species | Determining WS & FG SPH versus | |
| | Preferred | WS & FG preferred SPH for reports and exports | |
| | Coniferous | Calculating total conifers/ha for reports and exports | |
| External Stratum Data | Inv Status | Exports | |
| | Inv Type | | |
| | Silv Status | | |
| | Silv Type | | |
| | Export FG #s? | | Exporting FG versus WS numbers for reports and exports |
| Plot | Plot Name | Calculating # of plots for reports and exports | |
| | Total Trees by Layer (only if recording Inv Label % by species) | Calculating TS SPH, TS%, inventory label for reports and exports | |
| Species Tallies | Tree Species | Determining WS, FG, and TS SPH, species % breakdowns, silviculture and inventory labels for reports and exports | |
| | Well Spaced | | |
| | Free Growing (if FG Survey) | | |
| | Total Trees (if not recording Inv | | |

| | | |
|------------|--|--|
| | Label %) | |
| | Inv Label % (if not tallying total trees by species) | Determining TS SPH, TS%, inventory label for reports and exports |
| | Sample Ages and Heights in sample plots | Creating silviculture and inventory labels for reports and exports |
| Pest Data | all fields if pest is recorded | Calculating % host trees affected for reports and exports |
| Brush Data | all fields if brush is recorded | Calculating average % cover and heights for reports and exports |

4.3 Reports

There are several reports available for Survey Wizard:

- Phoenix Export
- Pest Info
- Map Legend
- Plot Card
- Single Story Report
- Multi Story Report

To print any of the reports, run them, then use the **Export to Excel button** in the top left corner and print from Excel.

4.4 Import from .SW3 File

In addition to the regular method of [loading card data](#), Survey Wizard can also import from an .sw3 file (legacy Survey Wizard export format).

To import from an .SW3 file:

1. Select either the BC SURVEY - Single Story or the BC SURVEY - Multi Story template depending on the data you will be importing.
2. Select the Imports tab, then the **Import button** next to 'Import From an SW3 file'.
3. Locate the .sw3 file you wish to import.
4. The importer will state how many cards were imported. Each imported card will be named with the prefix 'Imported', followed by the Block, CP Number, and Timbermark of the card.

**** Note:** *Only fields that existed in the legacy Survey Wizard program will be imported into SNAP! Survey Wizard.*

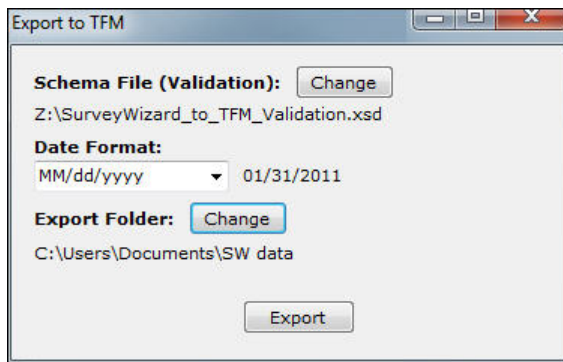
4.5 Exports

There are several exports available for Survey Wizard:

- [Export to TFM](#)
- [Phoenix Export](#)
- [Export to Files for Genus Import](#)

4.5.1 Export to TFM

Using the Exports tab, choose the **Export button** beside 'Export to TFM'. Select the card(s) you wish to export.



The export to TFM (TheForestManager) requires a schema file (.xsd) to validate against. You will need to obtain one and place it in a location where it can be readily accessed. This file validates the data as it is being exported to ensure that the format and data are correct. This should be the same as the validation performed upon subsequent import to TFM.

You can specify a date format if the one TFM uses is different than the one displayed.

Specify an export location. This is where the resulting .xml file will be saved.

If there are any problems with the format of the file or the data itself, you will be presented with a Validation Errors screen that will describe the issues found. Typical errors would include using the wrong species codes, pest codes, brush codes, etc.

The export produces an .xml file that can then be used for import into TFM.

4.5.2 Export to Phoenix Pro

The Phoenix Export can be accessed through the Exports tab or the [Report](#) tab. It is produced as a report that can be exported to Excel and saved. The resulting Excel file can be imported into Phoenix Pro.

4.5.3 Export to Cengea Forest

The export to Cengea Forest (Genus) function is found under the Exports tab. Select the card(s) you wish to export, then select a location to save the exported files. The files will be placed in a folder prefixed 'Exported' followed by a date and time stamp. There will be six files exported for import into Cengea via the Import Tool.

Part

5

5 Appendix A: Troubleshooting

Handheld:

Problem: "Error - This application (SnapMobile) requires a newer version of the Microsoft .NET Compact Framework than the version installed on this device."

Solution: Download and install Microsoft .NET Compact Framework 3.5 from <http://www.microsoft.com/downloads/details.aspx?familyid=e3821449-3c6b-42f1-9fd9-0041345b3385&displaylang=en>

Problem: "Error - SnapMobile.exe: InvalidProgramException"

Solution: Download and install Microsoft .NET Compact Framework 3.5 from <http://www.microsoft.com/downloads/details.aspx?familyid=e3821449-3c6b-42f1-9fd9-0041345b3385&displaylang=en>

Problem: ".NET CF Initialization Error - The application failed to load required components. If the .NET Compact Framework is installed on a storage card, please ensure that this card is in place and launch the application again. If this fails, a re-installation of the .NET Compact Framework is recommended."

Solution: Follow the instructions within the error message, ensuring that you have downloaded and installed Microsoft .NET Compact Framework 3.5 from www.microsoft.com/downloads.

**** Please Note:** *All other versions of .NET Compact Framework 3.5 must be removed from your handheld. To do so, go to Settings... System... Remove Programs and browse for previous versions of .NET CF. If there are any previous versions and you are having trouble running SNAP!, please select the older version and choose 'Remove'.*

Problem: "Could not create directory" error when trying to install SNAP! on the Windows handheld.

Solution: Download the version for mobile device from the website at <http://www.jrpltd.com/Support/Updates.aspx?Product=SNAP> and put the file onto the handheld. Run the .CAB file on the handheld to install SNAP! Mobile.

Part

6

6 Appendix B: Technical Support

Help Desk:

Technical support is available for licensed SNAP! dcs users. The Help Desk is open Monday to Friday, 8:00 a.m. to 5:00 p.m. PST. We are closed for Canadian statutory holidays.

Phone: 1-800-535-2093 ext. 300 *or* (250) 703-0451 ext. 300

E-mail: support@jrpltd.com

Please have the following information available when contacting us:

- PC Operating system (i.e. Windows version)
- Windows CE/Mobile version
- SNAP! version
- Any error messages that may have occurred

Index

- . -

.CAB 5
 .NET Compact Framework 4
 .NET Framework 4, 26
 .SnapPkg 8, 9, 11, 13
 .XML file 23
 .XSD file 23

- A -

Action 10
 ActiveSync 4
 Additional Information 12, 14, 17
 Analysis 13
 Cards 11
 Data 11
 App Store 5
 Attachments 6, 12, 14, 17
 Audio 6, 12, 14, 17

- B -

Back 17
 Backup 13, 16
 Cards 11, 13, 14, 16
 Data 13, 16
 Folder 16
 Templates 13, 16
 Themes 13, 16
 Batch 13
 Bluetooth 14
 Boolean 6
 Border 8

- C -

Calculate 6, 13, 14, 17
 Calendar 6
 Card 6, 11
 Analysis 11, 13
 Backup 11, 13, 14, 16

 Create 11, 14, 17
 Data 13, 16
 Delete 11, 13, 14, 16, 17, 18
 Download 16, 18
 Edit 11, 14, 17
 Export 11
 Import data from iSNAP! 18
 Import data from SNAP! Mobile 16
 Load 11, 14, 17
 Loading onto iSNAP! 10, 17
 Merge 11, 13, 14, 15
 Migrate 8, 9
 New 14, 17
 Print 11
 Remove 13, 16
 Restore 11, 13, 14, 16
 Save 14, 17
 Share 14
 Templates 6, 8, 9, 10, 11
 Themes 8
 View 11, 14, 17
 Cengea Forest Export 20, 21, 23, 24
 Change Backup Folder 16
 Change User 10
 Chart 13
 Checkbox 6
 Checklist 6
 CI-90 13
 Clear 6
 Client 8, 9, 11, 12, 13
 Clone 12
 Close 17
 Codes 6, 8
 Collapse 14
 Colors 8
 Comments 6, 12, 14, 17
 Confidence Interval 13
 Coordinates 6
 Count 13
 Create
 Cards 11, 12, 14, 17
 Data 12, 14, 17
 Default 14, 17
 View 12
 Customizing
 Code Lists 8, 9
 Colors 9
 Field Names 9

Customizing
 Help Text 9
 Labels 9
 Templates 8, 9

- D -

Data 6, 11
 Backup 13, 16
 Collection 2
 Create 12, 14, 17
 Default 14, 17
 Delete 13, 16, 18
 Edit 12, 14, 17
 Exchange 13
 Package 11, 13
 Restore 13, 16
 Save 14, 17
 Types 6
 View 12, 14, 17

Database 6

Date 6, 14

Date Format 23

Decimal 6

Decimal Places 8

Default 14, 17
 Value 8

Delete
 Cards 11, 13, 14, 16, 17, 18
 Data 11, 13, 14, 16, 17, 18
 iSNAP! 18
 Templates 8, 9, 10, 11, 16, 18
 Themes 8, 9, 10, 11, 16, 18

Desktop 4, 5, 8, 9, 11, 12, 13

Display
 Options 12

Distribution 9

Double 6

Downloading cards 16, 18

Draw 6

Drawing 12, 14, 17

Drill 14, 17

Dropbox 2, 10, 11, 17, 18

- E -

Edit

Cards 11, 12, 14, 17
 Data 12, 14, 17
 Templates 8
 Themes 8

Email 28

End 17

Errors 26, 28

Excel 12

Exit 17

Expand 14

Export 9, 11, 12, 13, 16
 as SNAP Package 13
 Cards 11
 Cengea Forest 20, 21, 23, 24
 Excel 13, 23
 Folder 23
 Genus 20, 21, 23, 24
 Phoenix 20, 21, 23, 24
 TFM 20, 21, 23

- F -

False 6

Favorites 12

Fax 28

Fill 8

Filter 12

Form 6

Format 6

Formatting 8, 9

Forms 2, 8

Formula 6, 13, 14, 17

- G -

Genus Export 20, 21, 23, 24

GPS 6, 14, 17

Grid 14, 17

Grouping 12

- H -

Handheld 2, 4, 5, 9, 10, 14, 16, 17

Help 6, 8, 14, 28

Hours 28

- I -

Image 6, 12, 14, 17
Import 11, 13, 16
 Cards 16, 18
 from .SW3 23
 from Excel sheet 11
 from SNAP Data Package 11
 from Survey Wizard 23
Information 6
Installation
 .CAB 5
 .NET Compact Framework 4
 .NET Framework 4
 ActiveSync 4
 Desktop 5
 Handheld 5
 iPhone 5
 iPod Touch 5
 iSNAP! 5
 Mobile Device 5
 Mobile Device Center 4
 SNAP! 4, 5
 SNAP! Client 5
 SNAP! Mobile 5
Integer 6
Introduction 2
iPhone 2, 4, 5, 10, 11, 17, 18
iPod Touch 2, 4, 5, 10, 11, 17, 18
iSNAP! 2, 4, 5, 10, 11, 17, 18
 Create Cards 17
 Delete 18
 Delete Cards 17
 Edit Cards 17
 Load Cards 17
 Remove 18
 Upgrading 11
 View Cards 17

- J -

Justification 8

- L -

Label 12

List 6, 8
Load
 Cards 10, 11, 14, 17
 Templates 8, 9, 10
 Themes 8, 9, 10
 to SNAP! Mobile 14
Long Name 8

- M -

Manage Data
 On Mobile Device 14
Manage Device Data 5, 9, 10, 14, 16
Mandatory 6, 8, 13, 14
Margins 13
Max 13
Maximum 13, 14, 17
Mean 13
Merge 16, 18
 Cards 11, 13, 14, 15
 Data 13, 15
Messages 26
Migrate
 Cards 8, 9
 Theme 8, 9
Min 13
Minimum 13, 14, 17
 System Requirements 4
Mobile 10, 14, 16, 17
 Device Center 4
Mobile Device 2, 4, 5, 9, 14
Move
 Section 12
Multi 6
Multi Story Surveys 21

- N -

NA 6
New
 Card 12, 14, 17
 Section 12, 14, 17
No 6
Number 6

- O -

Options 14
 Orientation 13
 Overview 2

- P -

Page
 Margins 13
 Orientation 13
 Setup 13
 Size 13
 Phoenix Export 20, 21, 23, 24
 Phone 28
 Pick 6
 Picture 6, 12, 14, 17
 Preview 13
 Print 11, 12, 13
 Multiple 13
 Preview 13
 Printer 13
 Problems 26
 Pulldown list 6

- R -

Range 13
 Receive 14
 Registration 5
 Reload 10
 Remove 8, 9, 10, 11, 13, 16, 18
 Cards 11, 14, 17
 Rename 12, 14
 Repeatable
 Sections 14
 Reports 23
 Required 6, 8, 13, 14
 Requirements 4
 Restore 13, 16
 Cards 11, 14
 Run 13

- S -

Save 14, 17

Section

Child 14, 17
 Delete 12, 14, 17
 Duplicate 12, 14
 Move 12
 New 12, 14, 17
 Parent 14, 17
 Rename 12, 14
 Repeatable 14, 17
 Summary 14
 View 12, 14, 17
 Send 14
 Setup 13
 Share
 Cards 14
 SharedFolder.txt 5
 Sharing
 Cards 11, 14
 Data 11, 14
 Templates 9
 Themes 9
 Short Name 8
 Single 6
 Single Story Surveys 20
 Size 13
 Sketch 6, 12, 14, 17
 SNAP! 2
 Analyze Data 11
 Backup Cards 11, 14
 Cards 8, 11, 23
 Client 2, 4, 5, 8, 9, 11, 12, 13
 Create Cards 11, 14
 Data 8, 11, 23
 Delete Cards 11, 14
 Desktop 2, 4
 Edit Cards 11, 14
 Exiting SNAP! Mobile 14
 Export Cards 11
 Import 11, 23
 Installation 4
 iPhone 2, 4
 iPod Touch 2, 4
 iSNAP! 2, 4
 Load Cards 11, 14
 Merge Cards 11, 14
 Mobile 2, 4, 5, 8, 9, 10, 14, 16, 17
 Package 8, 9, 11, 13
 Print Cards 11

SNAP! 2
 Restore Cards 11, 14
 Sharing Cards 14
 Survey Wizard 20, 21, 23
 Templates 8
 Themes 8
 View Cards 11, 14
 Standard Deviation 13
 Start 4
 Statistics 13
 Std. Dev. 13
 String 6
 Sum 13
 Summary 14
 Survey Wizard 23
 % Host Trees Affected 20, 21
 Block 20, 21
 Brush Data 20, 21
 Brush Summary 20, 21
 Export to Excel 23
 Exports 20, 21
 External Block Data 20, 21
 External Stratum Data 20, 21
 FG Statistical Calculations 20
 General Site Information 20, 21
 Inventory Label 20, 21
 Multi Story 20, 21
 Pest Data 20, 21
 Pest Summary 20, 21
 Plots 20, 21
 Reports 20, 21, 23
 Required Fields 20, 21
 Silviculture Label 20, 21
 Silviculture Standards 20, 21
 Single Story 20
 Site Description 20, 21
 Species Standards 20, 21
 Species Tallies 20, 21
 Stocking Summary 20, 21
 Strata 20, 21
 Template 20, 21
 WS Statistical Calculations 20
 Surveys
 Multi Story 21
 Single Story 20
 Synchronize 4, 5
 iPhone 17, 18
 iPod Touch 17, 18

iSNAP! 17, 18
 Mobile Device 14, 16
 System 4

- T -

Technical Support 28
 Template 6, 8, 12, 14, 17
 Backup 13, 16
 Changes 8, 9, 10, 11
 Delete 8, 9, 10, 11
 Loading onto iSNAP! 10
 Loading onto SNAP! Client 8, 9
 Loading onto SNAP! Mobile 9, 10
 Restore 13, 16
 Survey Wizard 20, 21
 Upgrades 8, 9, 10, 11
 Upgrading on SNAP! Mobile 10
 Templates
 Customize 9
 Export 9
 Share 9
 Text 6, 8
 TFM Export 20, 21, 23
 Theme 6
 Backup 13, 16
 Create 8
 Delete 8, 9, 10, 11
 Edit 8
 Loading onto iSNAP! 10
 Loading onto SNAP! Client 8
 Loading onto SNAP! Mobile 9, 10
 Migrate 8, 9
 Restore 13, 16
 Themes
 Export 9
 Share 9
 Troubleshooting 26, 28
 True 6

- U -

Up 14
 Upgrade
 Desktop 5
 Handheld 5
 iPhone 5, 11

Upgrade

iPod Touch 5, 11
iSNAP! 5, 11
Mobile Device 5
SNAP! 5
SNAP! Client 5
SNAP! Mobile 5
Template 8, 9, 10, 11
Theme 10

Upload

Cards 14, 17
Templates 10
Themes 10

- V -

Validation File 23

View

Cards 11, 14, 17
View data 12, 14, 17
Voice Clip 6, 12, 14, 17

- W -

Whole number 6
Wifi 5
Windows Mobile Device 2, 4

- Y -

Yes 6

- Z -

Zoom 12