

Setting up a new PDA

This section presents instructions on setting up a new PDA (personal digital assistant) for using FFI PDA in the field. The steps are:

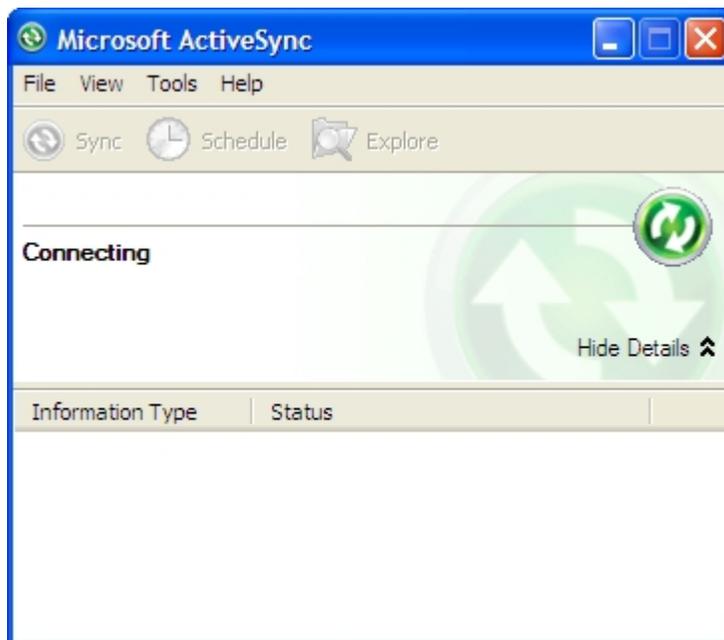
- o [Synchronizing the PDA.](#)
- o [Installing FFI PDA.](#)
- o [Loading any needed reference documents.](#)

FFI PDA is designed to be used on PDAs that run Windows Mobile 5.0. See [FFI installation](#) for memory and speed requirements.

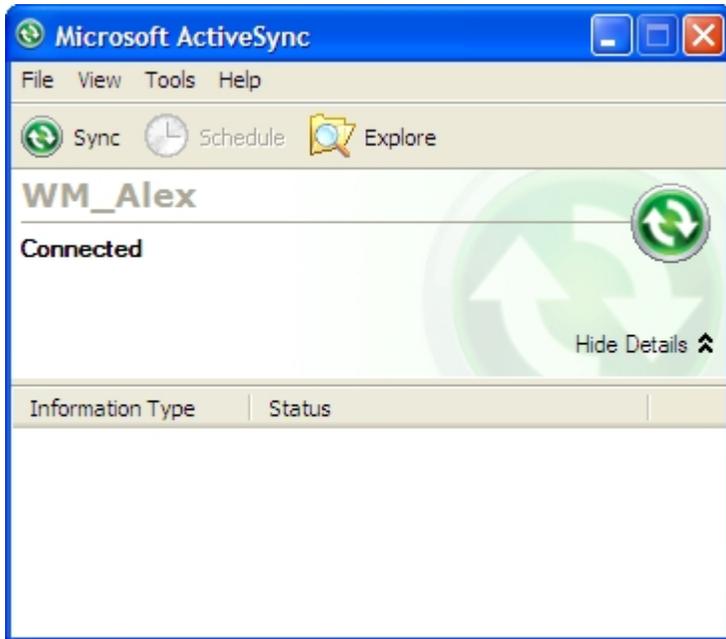
Synchronizing the PDA

The first step in installing FFI PDA is synchronization. The *User's Guide* assumes that you are using ActiveSync to synchronize your PDA. If you do not have ActiveSync on your PDA, you can download ActiveSync 4.5 from <http://www.microsoft.com/windowsmobile/activesync>.

To synchronize your PDA and the desktop, place the PDA in its docking station. ActiveSync will begin automatically. During synchronization, you will see the ActiveSync screens, shown below, on your desktop.



Important: When FFI opens, it occupies the full screen. Whenever you use FFI with your PDA, be sure to resize the FFI window so that you can see the ActiveSync window. ActiveSync must be running every time you use FFI with your PDA.



Important: When you run ActiveSync, be sure that all of the ActiveSync options are turned OFF, so that only ActiveSync itself is running. Follow the procedure shown below to turn off the ActiveSync options.

When synchronization is complete, move on to [Installing FFI on the PDA](#).

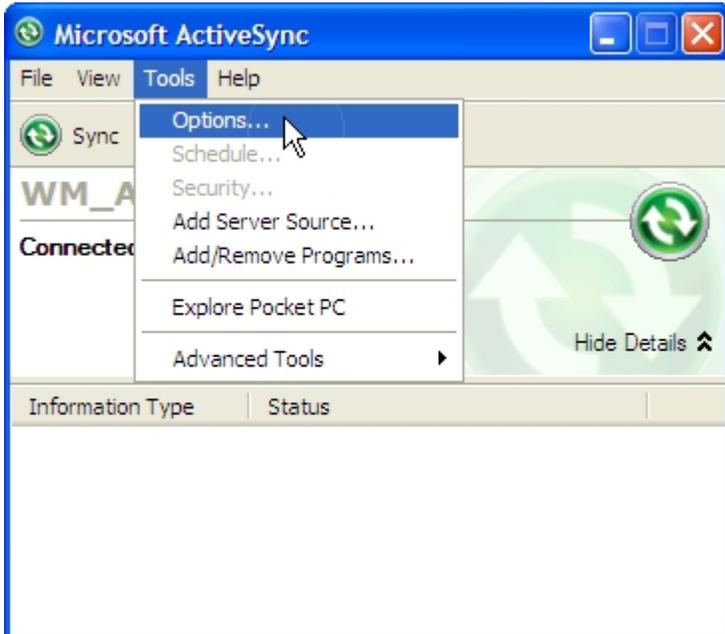
A note about ActiveSync partnerships

ActiveSync partnerships are optional. In a partnership, ActiveSync identifies your PDA with a specific desktop PC, and retains the information type settings for synchronization. You can also use ActiveSync as a guest, without forming a formal partnership. Because partnerships can trigger conflicts with FFI PDA, use them only if you also use your PDA for other applications, such as MS Outlook, that require a partnership.

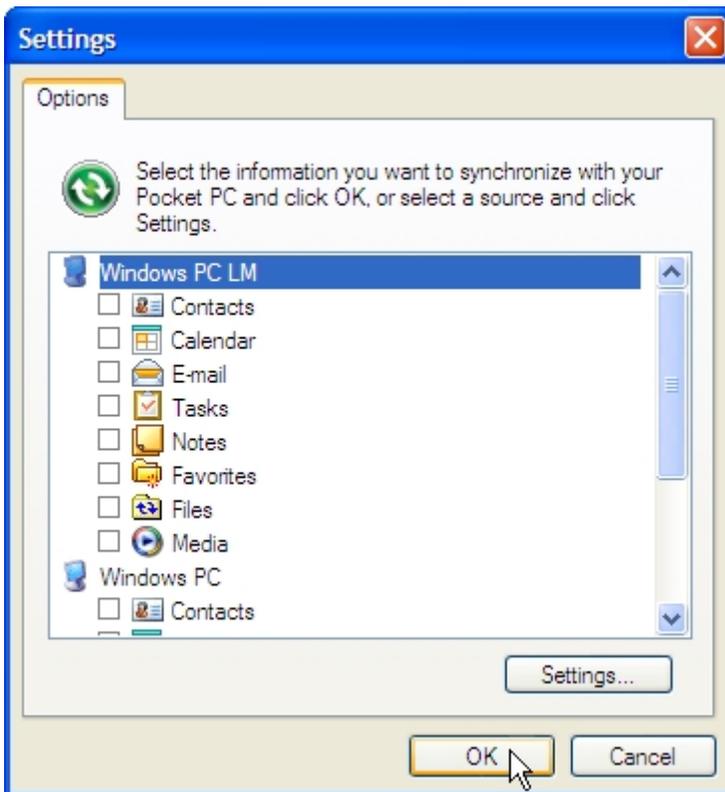
IMPORTANT: If you use an ActiveSync partnership, be sure to turn your partnership OFF before running FFI PDA. FFI PDA operations conflict with ActiveSync operations.

To turn off your ActiveSync partnership:

1. In the ActiveSync window on the desktop, click **Options** in the Tools pull-down menu.



2. Unselect each of the checkboxes, and click **OK**.



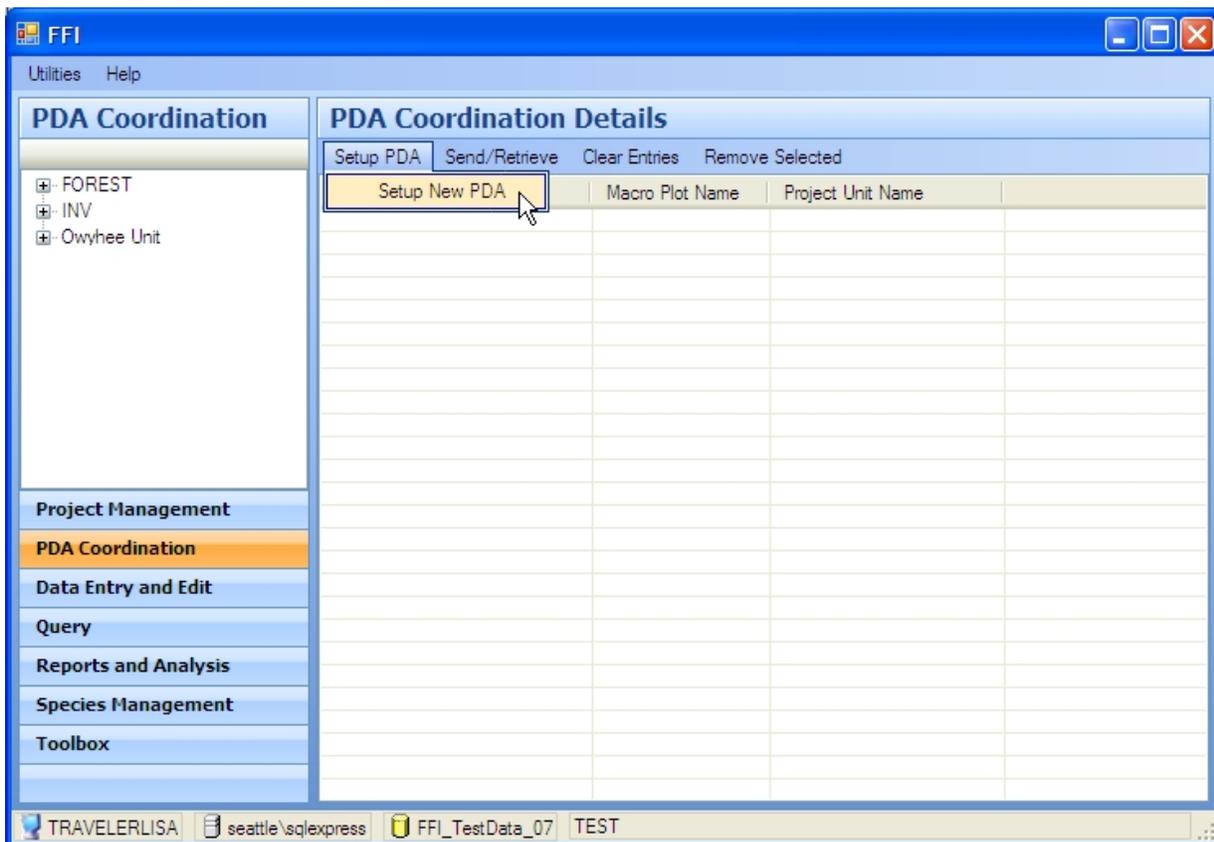
Installing FFI on the PDA

NOTE: Installing FFI PDA requires approximately 15 minutes, and requires that you carefully monitor your desktop and the PDA to read and respond to installation prompts and instructions.

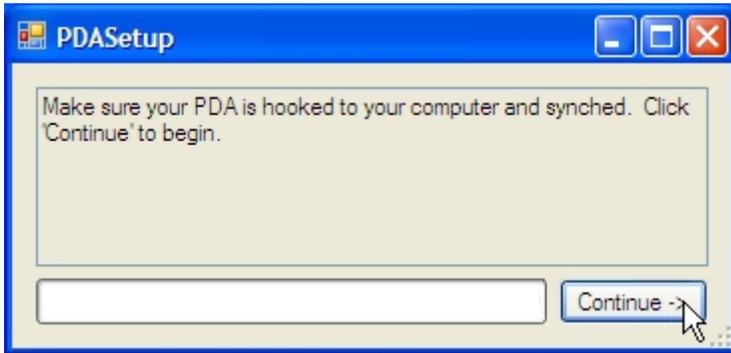
Important: Be sure to resize the FFI window so that you can see the ActiveSync window. ActiveSync must be running every time you use FFI with your PDA.

After synchronizing your PDA, follow these steps to install FFI PDA:

1. Start FFI on your desktop computer and open **PDA Coordination**.
2. In the **Setup PDA** pull-down menu, select **Setup New PDA**.



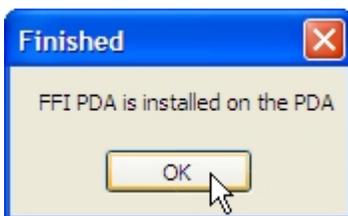
3. The **PDA Setup** window opens on your computer. This window will remain open throughout the installation, and will periodically give you instructions and prompts. Click **Continue** in the window to begin the installation process.



4. **IMPORTANT:** Pay close attention during the installation process. You will need to watch both the desktop and the PDA windows to read and respond to dialogs. Although the installation procedure varies somewhat from PDA to PDA, depending on its configuration, the installation generally follows this pattern:
 - a. The PDA will ask to install a component.
 - b. Install the component on the PDA.
 - c. Once the component is installed, tap **OK** in the upper right corner of the PDA window.
 - d. Click **Continue** in the desktop **PDA Setup** message box.

General installation notes:

- o If the PDA asks about reinstalling existing components, click **Yes**.
 - o When the PDA asks to restart, click **OK**.
 - o When the PDA announces that it has successfully installed something, click **OK**.
 - o Click **Continue** in the **PDA Setup** window after the PDA has finished a particular task.
5. When installation is finished, a **Finished** message box will display on the desktop. Click **OK**.



After FFI is installed on your PDA, the **FFI PDA** program icon appears in the PDA **Programs** window.



NOTE: You need only install FFI on the PDA once, although there is no harm in reinstalling it.

After FFI PDA is successfully installed, see [Exporting sample events to the PDA](#).

Exporting sample events to the PDA

To prepare for sampling in the field with the PDA, you must export sample events to FFI PDA. FFI will also export the local species list and its associated picklists to the PDA.

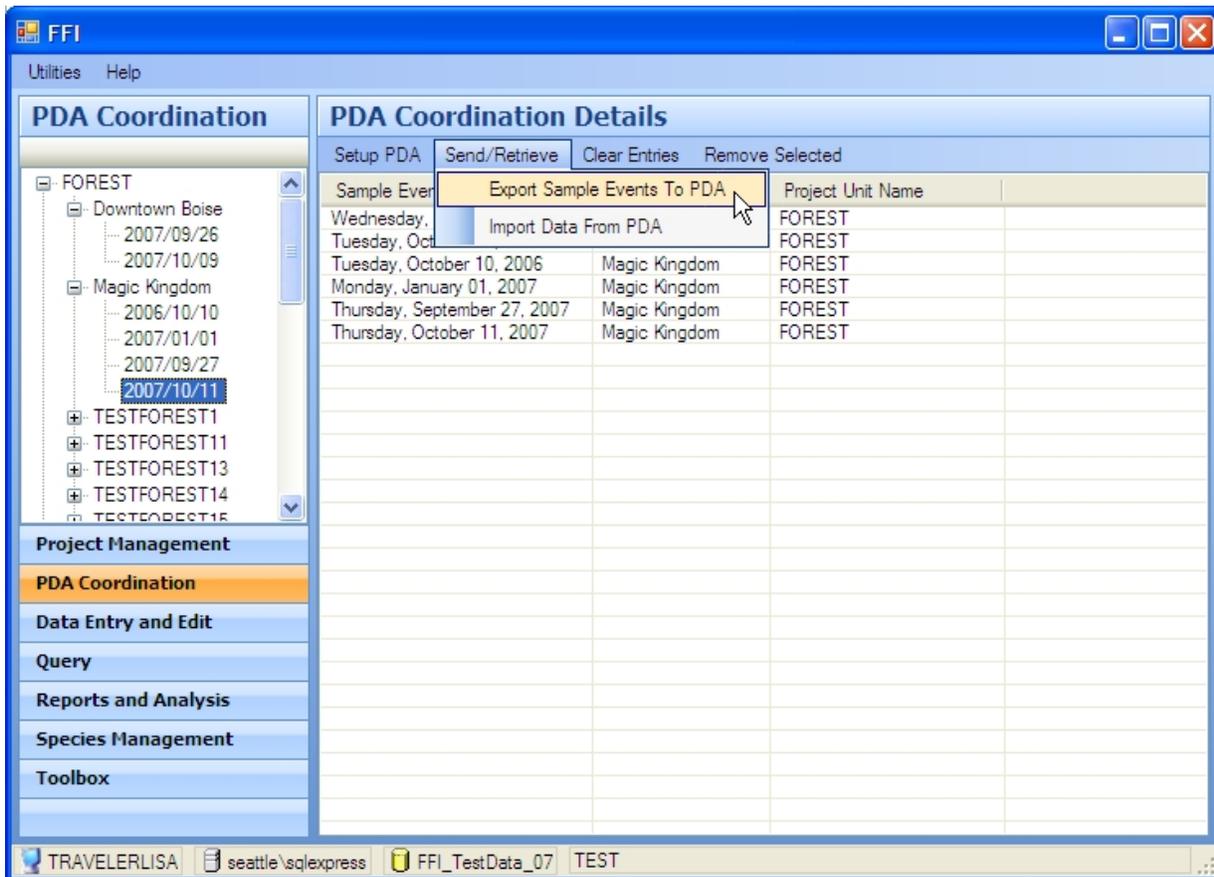
Following are some important tips to observe when you export sample events:

- If you have an ActiveSync partnership, be sure to turn it OFF before running FFI. Also turn off any ActiveSync options, so that only ActiveSync is running.
- You can only collect data for the macro plots and sample events that you specify when you export to the PDA. Therefore, if you are installing a new plot, you must create the plot in the FFI Project Management module, even if you don't yet have any coordinates or other information about the plot. You can edit the macro plot description after you return from the field.
- Sample events are unique to macro plots, You must select each sample event for each macro plot you wish to visit. Example: if you want to visit three plots on May 29, 2008, that date should appear three times in the **PDA Coordination Details** data grid, as shown below.
- Be sure to export a sample event to the PDA only once. The PDA doesn't retain any data, so once you import a completed sample event into FFI, the PDA has no memory of it. If you export the sample event again later, none of its method data will be exported with it.

To export sample events:

1. On your desktop, start FFI and select **PDA Coordination**.
2. Place the PDA in its docking station.
3. In the **PDA Coordination** tree view, navigate to the appropriate project unit and macro plot.
4. Click each sample event to be exported. The events will be listed in the grid in the **PDA Coordination Details** window. Note that sample events for two macro plots will be exported.

- On the desktop, select **Export Sample Events to PDA** in the **Send/Retrieve** pull-down menu.



- A progress bar will appear. The export process takes several minutes. When the bar disappears, the process is complete. The sample events will disappear from the **PDA Coordination Details** grid.

You may also wish to [load reference documents](#) on your PDA before going to the field.

Important: Before you go into the field, perform a self-restoring Sprite backup on each of your memory cards to protect against data and application loss. For information, see [Creating a self-restoring Sprite backup file](#) in the FFI PDA Field Handbook.

To work with your sample events in the field, proceed to the [FFI PDA field handbook](#).

Loading reference documents

You may also wish to transfer Word, Excel, and Acrobat documents from your desktop to the PDA for reference in the field.

To transfer files, you need to establish an ActiveSync partnership. Then you can use the **Explore** icon on the ActiveSync window to bring up a Mobile Device explorer window, which can then be used to copy documents directly to the PDA. See your PDA operator's manual for more information on document transfer.

NOTE: Be sure to turn your ActiveSync partnership OFF before running FFI.

Acrobat Reader

The *FFI PDA Field Handbook* is available as a PDF that you can load on your PDA for use in the field. This requires that you install Adobe Reader for Pocket PC 2.0, which can be downloaded at <http://www.adobe.com/products/acrobat/readerforppc>.

Importing data from the PDA

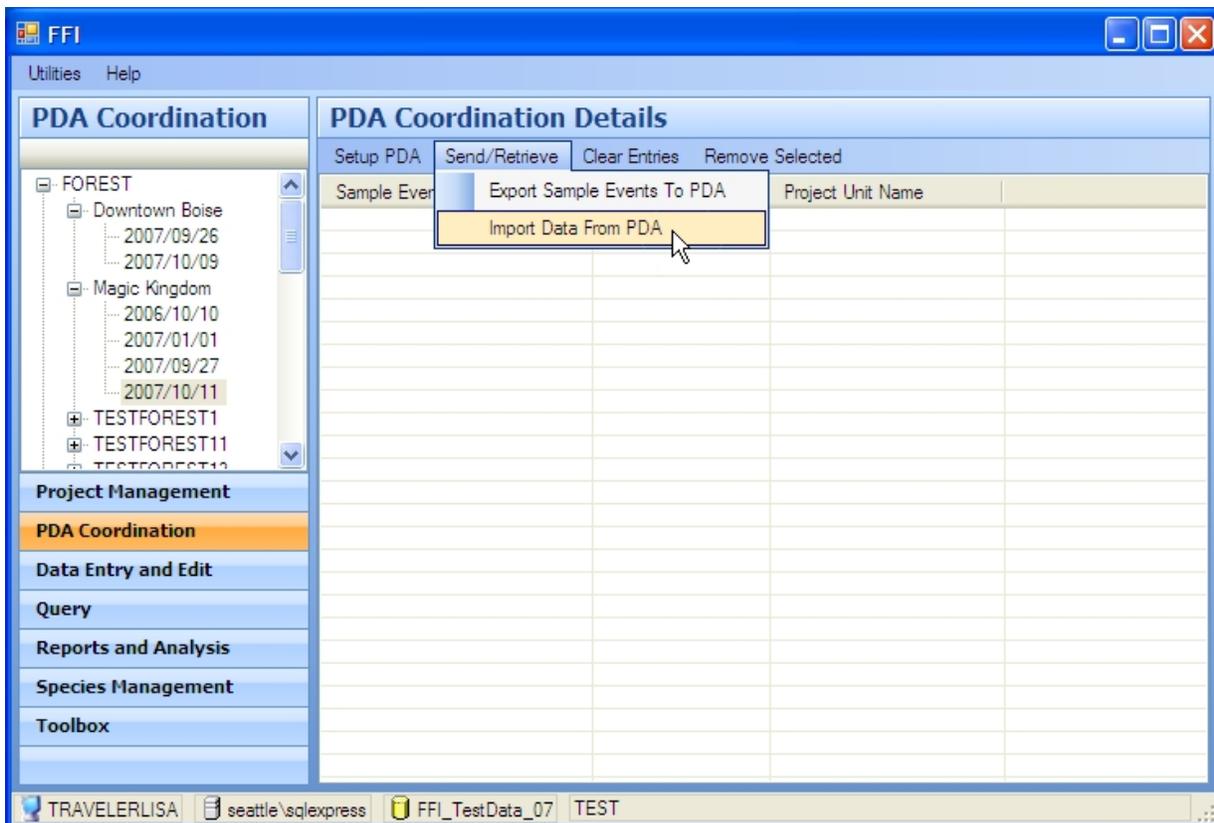
After you have collected field data and returned to the office, import your data into the administrative unit database on the desktop.

NOTE: Be sure to turn your ActiveSync partnership and any ActiveSync options OFF before running FFI.

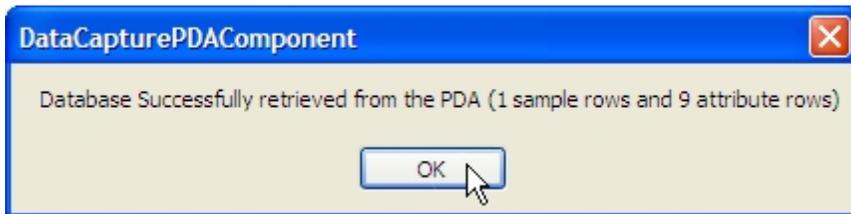
1. Synchronize the PDA by placing it in the docking station. FFI PDA should not be running. Be sure that ActiveSync recognizes the PDA, ensuring that the computer and the PDA are communicating.

*NOTE: ActiveSync does **NOT** download your field data from the PDA.*

2. On the desktop, start FFI and log into the appropriate administrative unit and database.
3. Click **PDA Coordination**.
4. In the **Send/Retrieve** pull-down menu, click **Import Data From PDA**. The import begins automatically and may take a few minutes.



- When the import is complete, a message window opens. Click **OK** in the **Data Capture PDA** message window.



NOTE: All of the field data that you designated for import is now contained in the administrative unit database on the desktop, and no longer resides on the PDA. However, if other administrative unit databases are present on your PDA, they will not be affected.

- You can now go to **Data Entry and Edit** in FFI on your desktop and view the data for the sample events that you imported. The screenshot below shows the data that was imported for the *Magic Kingdom October 11, 2007* sample event.

NOTE: See [Data entry and edit](#) for more information on viewing and working with data.

