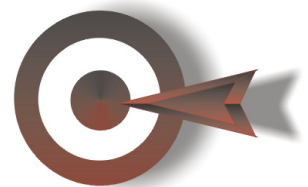




User Guide

Putting Knowledge To Work™



X-ACT! SOFTWARE

HandiWorx 4 User Guide

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Using HandiWorx

Overview

HandiWorx is part of the KnowledgeWorx suite of tools designed to capture, build, and share knowledge. The HandiWorx component runs **Flexpaks** generated by the desktop application, Construx.

Flexpaks are kits of reusable information that contain a collection of knowledge and applicable Rules. Flexpaks allow you to store your *Intellectual Capital* and ideas in a format that can be reused, shared, or even sold to others. Reuse of this information occurs as a Flexpak is run on handheld devices like the Palm or PocketPC using a *Flexviewer*. While anyone who has purchased a Flexviewer can run a Flexpak, you can only create and deploy new Flexpaks if you have purchased the entire KnowledgeWorx suite, and have access to Construx.

If you are a Construx user, you already know the basics of how to use HandiWorx, since it works just like the Simulator included with Construx. If you are not familiar with Construx, that's okay -- you will find that HandiWorx is easy and straightforward to use. Also, HandiWorx provides flexible options for data storage and security, which are especially important if you conduct Quizzes, Audits or Surveys requiring multiple participants to run a Flexpak from your device.


Getting Started


HandiWorx is easy to use. To get started, simply tap on the HandiWorx icon on your application screen. After displaying the "About..." screen, HandiWorx presents the "Control Center". The Control Center displays a listing of the available Flexpaks and allows you to perform basic administration activities:


HandiWorx

Flexpaks Available

insurance

 **Run**

 **Flexpak Info**

 **Help**

- Select a Flexpak to run or delete
- Manage answers and previous sessions
- Get information about a Flexpak
- Get help

Note: You must have installed at least 1 Flexpak for the Control Center Flexpak list to contain anything. Flexpaks are viewable only through HandiWorx.

Getting Flexpak Information:

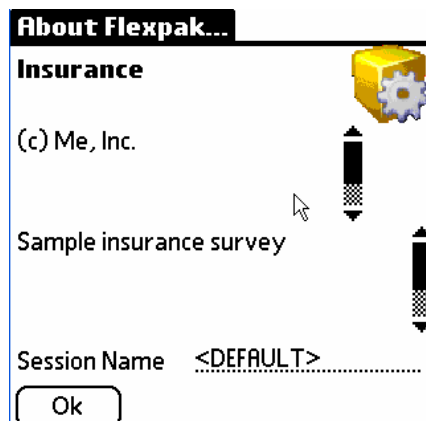
- From the Control Center, tap on a Flexpak to select it.
- Tap Flexpak Info. A dialog appears, showing information about the Flexpak.
- When you are done, tap Ok and you will be returned to the Control Center.



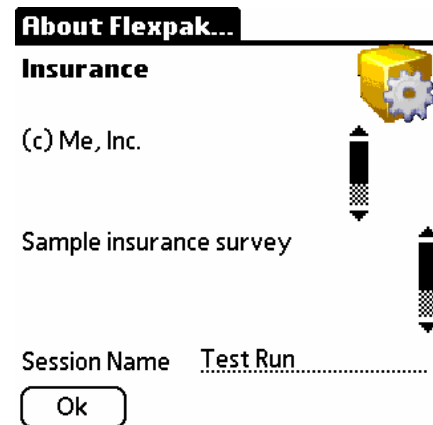
The dialog box is titled "Flexpak Information" in a black header bar. It contains the following text: "Filename: insurance", "Title: Insurance", "Copyright Information: (c) Me, Inc.", and "Additional Information: Sample insurance survey". There are two vertical scroll bars on the right side. At the bottom is an "Ok" button.

Running a Flexpak:

1. From the Control Center, tap on a Flexpak to select it.
2. Tap Run. The About Flexpak window appears, showing information about the Flexpak you selected.
3. Optional: you can specify a Session Name for this run of the Flexpak. You can opt to not specify a name (and accept the <DEFAULT> instead); if so, a unique name is generated for you.



The dialog box is titled "About Flexpak..." in a black header bar. It contains the text "Insurance" and "(c) Me, Inc." with a yellow gear icon to the right. Below is "Sample insurance survey". At the bottom is "Session Name <DEFAULT>". There is an "Ok" button.



The dialog box is titled "About Flexpak..." in a black header bar. It contains the text "Insurance" and "(c) Me, Inc." with a yellow gear icon to the right. Below is "Sample insurance survey". At the bottom is "Session Name Test Run". There is an "Ok" button.

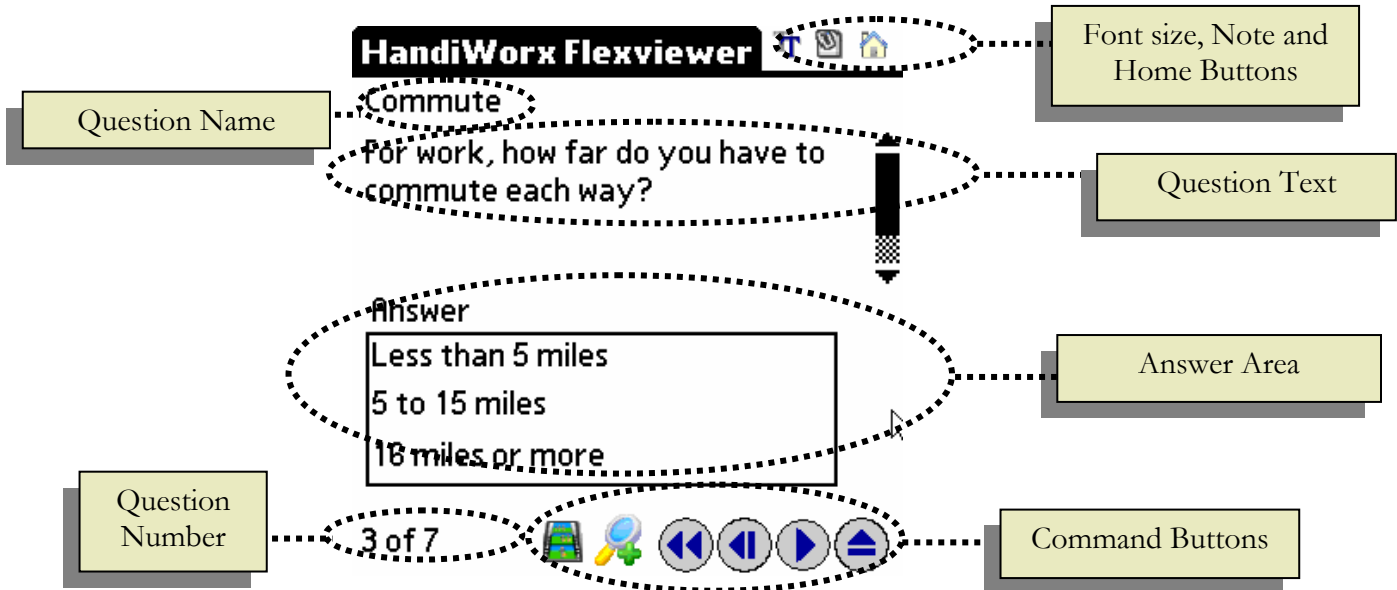
⚠**Note:** If you specify a Session Name that already exists, you will re-open that session. This feature can allow you to go back and review or change answers for Sessions already conducted.

4. When you are ready, tap the Ok button to start running the Flexpak.

After selecting Ok, the Flexviewer window appears. Using the controls on the Flexviewer, you can navigate from one question to another, and provide answers/input for questions presented.

Introducing the Flexviewer

The Flexviewer allows you interact with the Flexpak. The following illustrates the PalmOS version; PocketPC/Windows Mobile is similar.



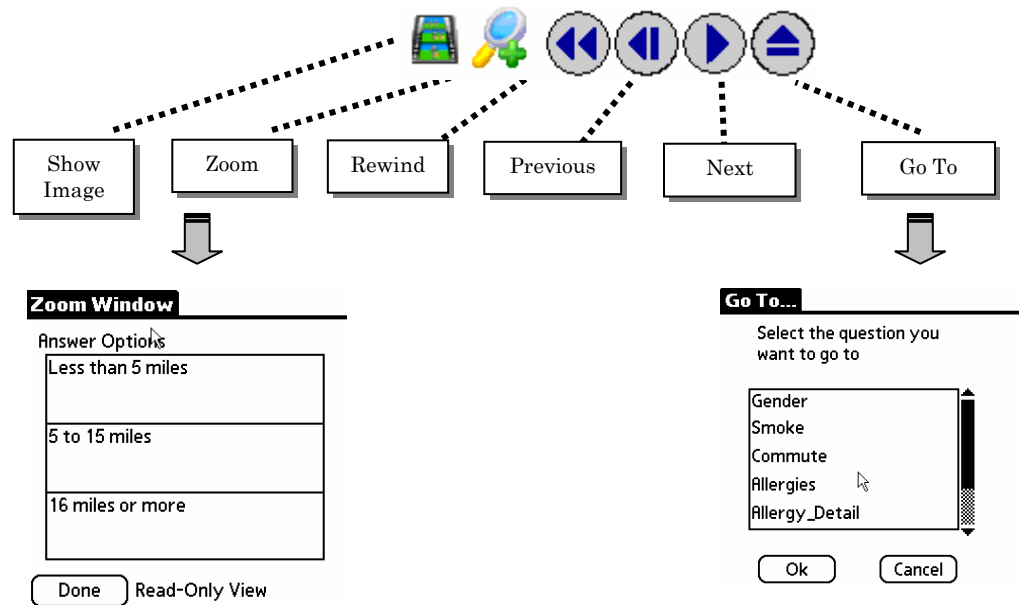
- **Question Number & Name:** These fields display the current question's number and label.
- **Question Text:** This field displays the current question's text. This field may or may not be blank.
- **Answer Area:** This area is where you enter an answer. The contents of this field will be different – or may be hidden – depending on the type of current question currently viewed. Answer types are discussed in further detail in the next section.
- **Command Buttons:** These are control buttons.

Note: All buttons, except the "play" button, may be hidden from view. If so, this behavior was specified by the person who developed the Flexpak you're running.

- The last four buttons act like the controls on a CD-player, allowing you to navigate forward, backward, and "to the beginning". The right-most button is the "go to" button, which allows you to select any non-hidden question, and move immediately to it.
- The two left-most buttons are the "show image" and "zoom" buttons. Show Picture will display any (optional) images associated with the current question. Zoom is used to expand your view into the options list; long options that do not completely fit in the Flexviewer window can be displayed by pressing this button. Depending on the question type, the zoom button may or may not be visible.

- **Navigation:**

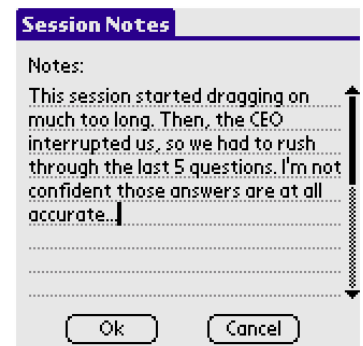
The navigation buttons allow you to sequentially move forward and backward through the Flexpak. When Forward is pressed, HandiWorx captures your answer for the current question, executes any associated Rules, and then displays the next question. Pressing Back moves to the previous question without executing any Rules or capturing answers. The Back button is useful if you wish to change the answer for a previous question. Revind restarts the Flexpak at the first question.



- **Font size, Note and Home:**



- The left-most button is the **Font size Button**. This button toggles between normal and large sized font. If you tap once to increase the font size; tap a second time to return the font to normal size
- The middle button is the **Note Button**. This button allows you to enter notes and comments for the current session. Each session you conduct can have a unique

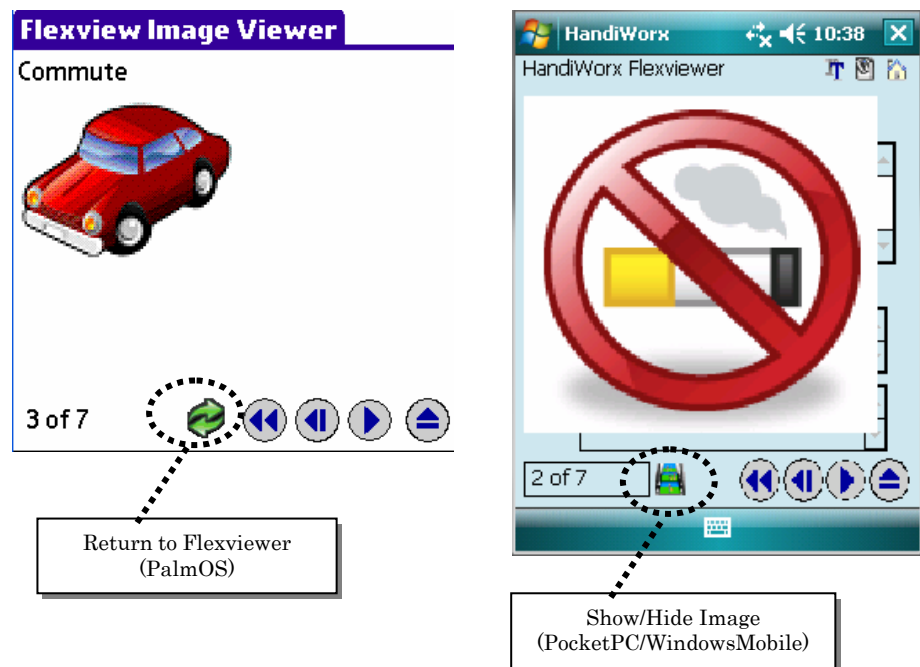


note. To delete an existing note, simply highlight the entire note text, erase it, then press Ok.

- The right-most button is the **Home Button**. This button saves the current Flexpak session, closes the Flexviewer, and returns you to the Control Center.

○ Displaying Images

Some questions may have images associated with them. If there is an associated image or picture, the “Show Image” command button will be displayed by HandiWorx. To show the image, simply tap the Show Image button. To return to the Flexviewer, tap the “Return” button (on PalmOS devices) or tap the “Show Image” button again (on PocketPC/Windows Mobile devices).



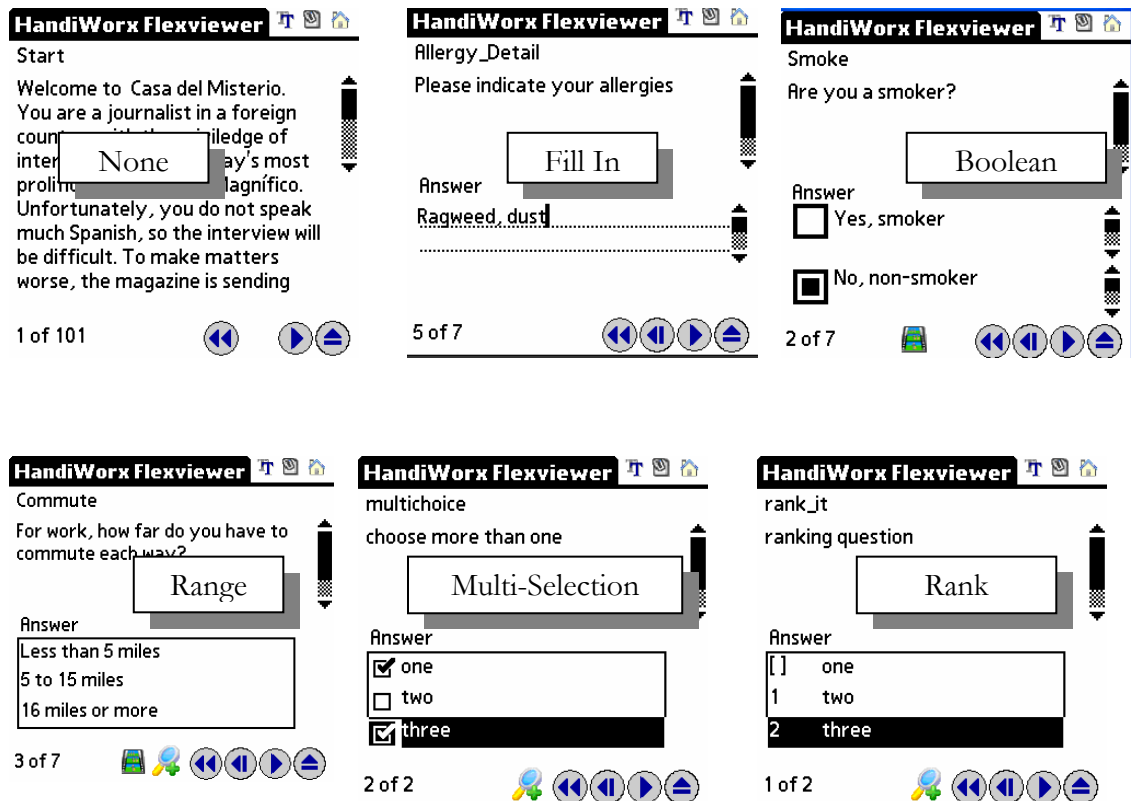
On PocketPC/Windows Mobile devices, images are stored in the ‘My Documents’ folder, or the root directory of the device. If there is supposed to be an image associated with a question but it is not displaying properly, check to make sure the image is in one of these two locations.

Images on PalmOS devices are displayable only on PalmOS version 4.0 or greater. Further, PalmOS devices may not be able to display very large images.

Answering Questions

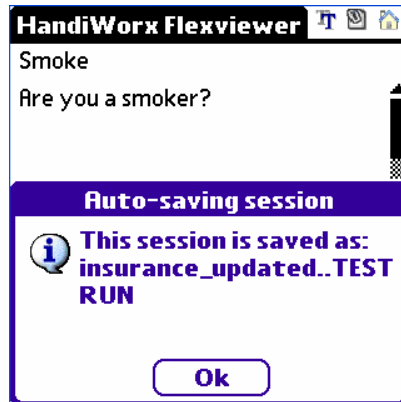
The information displayed in the Answer Area changes depending on the type of question presented. The following presents the possible types of questions, and a description of how to specify an answer for each:

1. None: No answer is expected, so the answer area is hidden. This is typically used for displaying directives or other information.
2. Fill-in: Write (or type) an answer in the appropriate space on the Flexviewer. The Flexpak designer may have supplied a default answer.
3. Boolean: Two choices are presented. Tap on the radio buttons to select one of the two choices. When you select one choice, the other is automatically de-selected.
4. Range: Three or more choices are presented in a list. Tap on one of the choices to select it.
5. Multi-Select Range: Three or more choices are presented as checkboxes in a list. Select one or more choices from the list.
6. Rank: Multi-select choices that can be selected in ranking order.



Saving Sessions

Sometimes, you might have to interrupt an Answer Session (perhaps, to start another session with another participant¹). You can return to the control center by tapping the Home button at the top of the screen. HandiWorx automatically saves the current session, allowing you to resume it later if you wish.

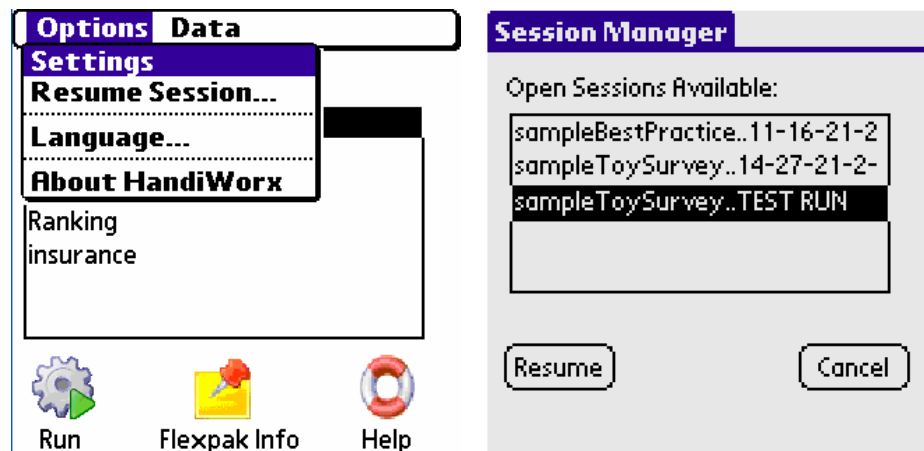


¹ For example, if you are conducting surveys, one of your participants may be interrupted by some other business. You can save the current session and prepare for the next participant by simply returning to the Control Center. HandiWorx will save the current session for you.

Resuming Sessions

To resume a previously saved session:

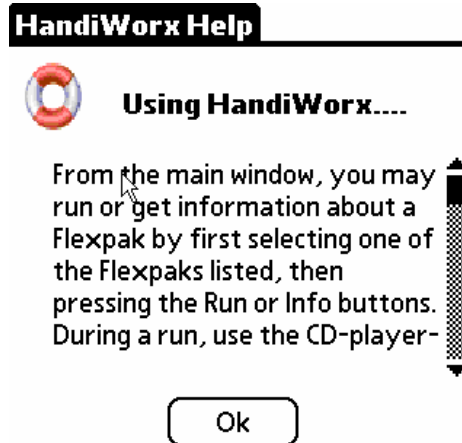
1. From the control center, tap the menu icon. Then tap Options - Resume Session. The Session Manager window appears.



2. From the list of sessions presented, select the session you wish to resume, then tap the Resume button. If you wish not to resume a session, tap the Cancel button to return to the control center.

Getting Help

Online help is available from the Control Center and from the Options window. From either location, tap the Help button to bring up context-sensitive help. When you are finished, tap the Ok button.



Downloading Answers

Once you have captured your data, you can download the information to your PC. Depending on your device (Palm or PocketPC), you will do things slightly differently.

- **PalmOS:** Perform a hotsync, and your Answers will be automatically transferred to your HandiWorx directory (i.e. *Palm\<hotsync name>\HandiWorx*, where *hotsync name* is the name of your device).
- **PocketPC:** Use the *PPC-Extractor* program included with HandiWorx (or KnowledgeWorx) to convert and transfer files from your device to your desktop. When you run PPC-Extractor, you are asked to specify the directory where you want the Answer files placed on your desktop computer. *Note: PPC-Extractor requires that your device is connected to your desktop using ActiveSync.*

An Answer file is a comma-separated-value (CSV) file that has the same name as a Flexpak, but with **_ansx** appended to it. For example, a Flexpak named *tutorial* has an Answer file named: **tutorial_ansx.cdb**

Any tool that can read CSV can import Answers. If you own the KnowledgeWorx suite, you can use DataWorx to do the job. Either way, note that the HandiWorx installer installed a special Conduit needed to transfer Answer files to your PC. Without this conduit, the data will not synchronize properly, so if you need to synchronize answer files with your PC, you must ensure HandiWorx was installed with the supplied installation program.

Exporting Answers

In addition to supporting the “download” functionality described in the previous section, HandiWorx also allows you to export your answers to files on your device. The export functionality allows fully mobile users to extract their answer files and share them via a variety of communications mediums including WiFi, WLAN, email and others.

PalmOS answer files are exported as Memopad records; PocketPC answer files are exported as .cdb files at the root directory on the device.

To export answers (PalmOS):

1. From the control center, tap the menu icon. Then tap Data – Answer Sets. The Answer Set Manager window appears.
2. From the list presented, select the Answer Set you wish to export to Memopad. Then tap the menu icon, and tap Export. The Answer Set is exported as a record in the memo database. You can now view, email or beam the information from outside of HandiWorx.



PalmOS Limitations:

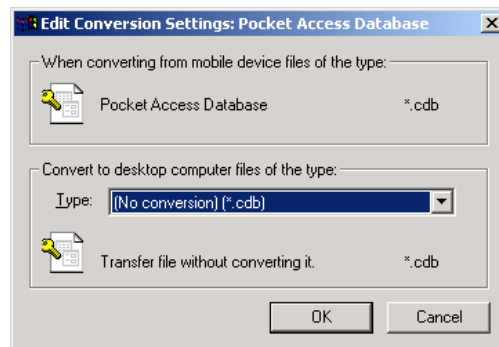
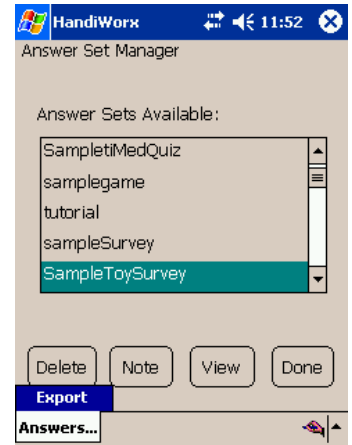
PalmOS Memopad supports a maximum of about 4000 characters of information for each record. If your Answer Set is larger than that maximum, HandiWorx will split the Answer Set into multiple records. You will have to manually recombine the records on a desktop computer, or in an application that supports larger data records.

Note If you are a DataWorx user:

DataWorx expects answer file to have a file extension of: _ansx.cdb. On desktop computers, Memopad information is converted to standard text files with a .txt extension. Prior to using DataWorx for data analysis, you will have to convert the file type to a .cdb file, and add _ansx to the end of its name.

To export answers (PocketPC/Windows Mobile):

1. From the control center, tap the Data – Answer Sets menu. The Answer Set Manager window appears.
2. From the list presented, select the Answer Set you wish to export. Then tap the Answers... menu and tap Export. The Answer Set is exported as a .cdb file, placed in the root directory of your device. You can now view, email or beam the information from outside of HandiWorx.
3. (Optional) – PocketAccess and ActiveSync typically associate PocketAccess files with a .cdb extension. The Answer Set files produced by exporting from HandiWorx are not PocketAccess files. If you are going to transfer your exported files using ActiveSync, you will need to disable the default conversion rules ActiveSync uses. To do so:
 - a. From ActiveSync on your desktop computer, select Tools – Options.
 - b. Click the Rules tab, and press the File Conversion ‘Conversion Settings’ button
 - c. Click the Device to Desktop tab, and select Pocket Access Database from the list presented. Press the Edit button.
 - d. Choose ‘No conversion’ from the dropdown list in the ‘Convert to Desktop Computer Files’ section. Press OK.



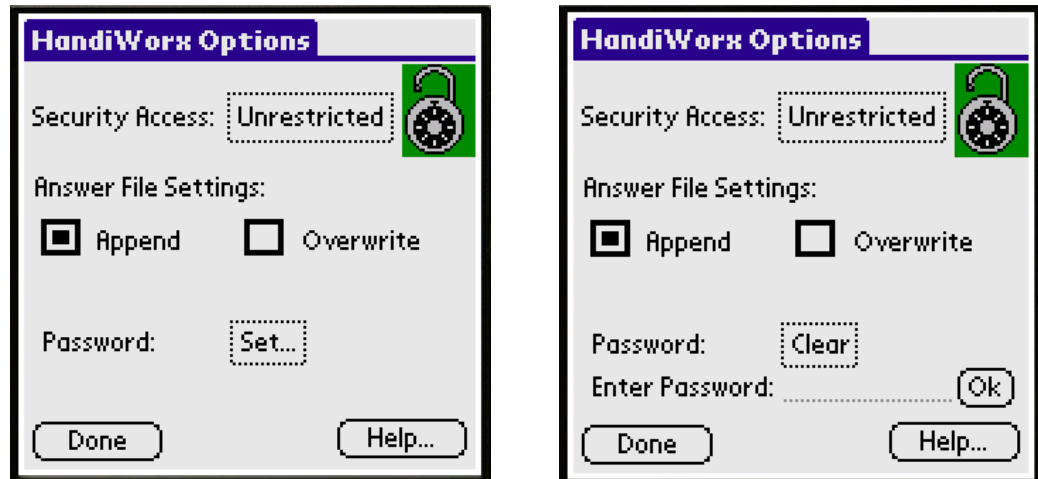
Management Functions

There are several settings and options that determine how HandiWorx handles Answers collected from Users. Certain options also restrict access to secure features by unauthorized users. In particular, the security features are useful if multiple persons collecting data will use one device, and you want to prevent accidental access or modification of important data.

The Management Functions from the Data menu are available to all Users unless you set the Security option to Restricted. If Security is set to Restricted, only authorized Users (Users with your password) can access these features.

Setting HandiWorx Options

From the control center, tap the menu icon. Select Options – Settings. The Options window appears.



The default HandiWorx setup is:

- No password set
- Security: Unrestricted (allows full access to all features)
- Answer Files: Append (Each Flexpak has its own answer file, but all data captured from multiple executions of a Flexpak are appended in the same answer file).

Of course, you are free to change any of these options. Below is an explanation of the other possible settings:

- Password set (An alpha-numeric password was supplied)
- Security: Restricted (Management Features from the Data menu are locked – they are not accessible by unauthorized Users)

- Answer Files: Overwrite (Each Flexpak has its own answer file, and all data captured from an execution of a Flexpak overwrites existing data from previous executions).

Setting a Password:

Tap the Set... button. The Enter Password field appears. Enter a password (consisting of text and/or numbers) in the field. Make sure you remember your password!

Tap Ok. HandiWorx will display a message indicating your password is accepted.

Changing Security:

If you have not already selected and entered a password, follow the instructions above and do so.

Tap the Security Access Button (the one displaying “Unrestricted” or “Restricted”)

Note: If your password was entered during a previous run of HandiWorx, you will be prompted to provide authentication by supplying your password. Once authenticated, you may change the security setting as outline above.

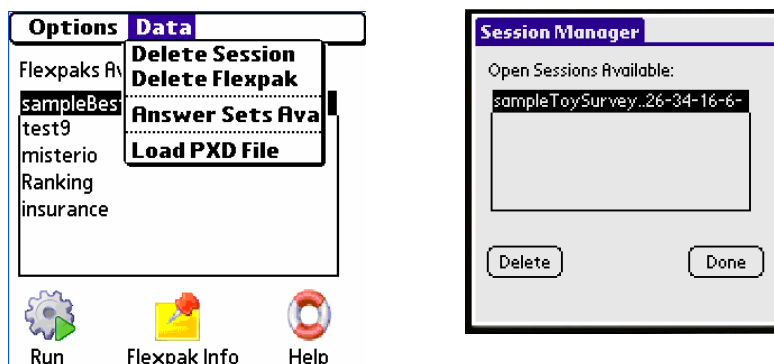


Deleting Sessions

Sometimes, you might have some open sessions that you find you no longer need or want. You can tidy up and remove unwanted sessions via the Delete Session command.

To permanently remove an open session from the device:

1. From the control center, tap the menu icon. Then tap Data - Delete Session. The Session Manager window appears in deletion mode.



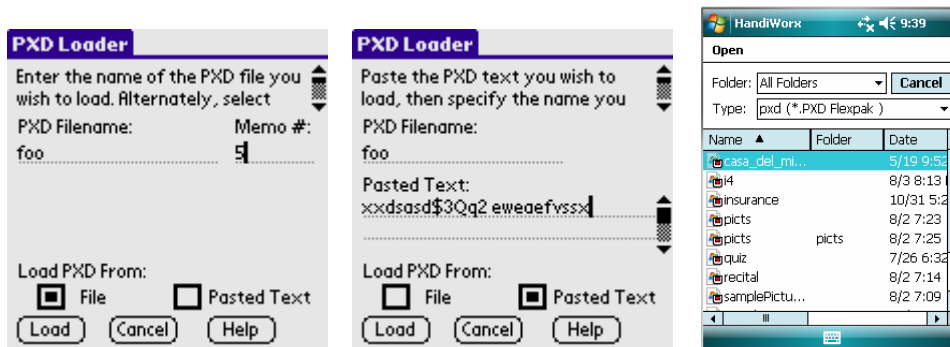
- From the list of sessions presented, select the session you wish to delete, and then tap the Delete button. If you wish not to delete a session, tap the cancel button to return to the control center.

Loading PXD Files:

PXD files are Portable Flexpak Delivery files. They are text-based, cross-platform compatible files that HandiWorx can convert into Flexpaks to run on your device. PXD files can be useful when obtaining Flexpaks via email, WiFi, and other communications mediums. The Construx application creates PXD files.

To load a PXD file:

- Tap the menu icon, and then tap Data – Load PXD File. The PXD Loader window appears.
- For PocketPC/Windows Mobile devices:** simply select the file you wish to load from the “Open File” dialog that appears.
- For PalmOS devices:** Memopad is the “data source file”, so PalmOS users need to first import the PXD data into Memopad, and then specify the filename **and** the Memopad record number to load from. (Note: PXD files are text files, but PalmOS Memopad will not recognize the format until the filetype is changed from .pxd to .txt). If you are *past*ing PXD information from another source, tap the Pasted Text radio button, then paste the text into the ‘Pasted Text’ text field by tapping the Edit – Paste menu option.
- Tap the Load button. The Flexpak will be created from the source PXD text.



☞ **PalmOS Memopad Limitation:** The memo record you select must be the **last** memo in the database to ensure correct data import. Otherwise, extraneous data from other memo records may be imported from the database.

Managing Answer Sets

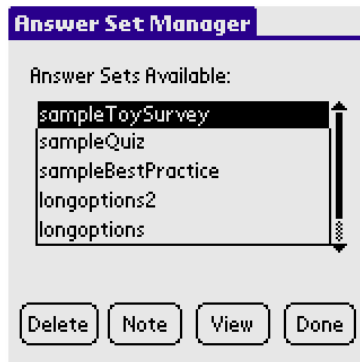
From the Answer Set Manager, you may delete existing Answer Sets, add a comment/note to the Answer Set, or view/review answers. **Deleting Answer Sets should be done with caution.** Remember, an Answer Set in Append mode contains all the session answers for a particular Flexpak up until that point. Take care that you do not mistakenly delete important answer data you wish to retain.

Notes may be added to an Answer Set for any purpose you want, but are typically added to give an explanatory overview for the answer set as a whole. Recall each individual Session can also have comments/notes attached to them as well by using the note/comment button on the Flexviewer window.

The View command is useful when you want to obtain a quick, high-level overview of the answers given for a session, without having to navigate from question-to-question using the Flexviewer.

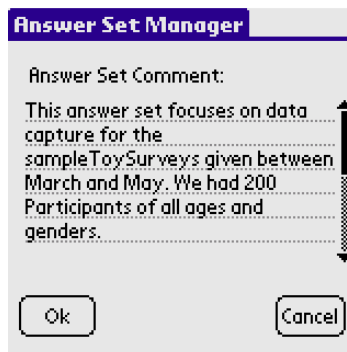
To Manage Answer Set Data:

Tap on the menu icon from the control center. Then select Data – Answer Sets. The Answer Set Manager window appears.



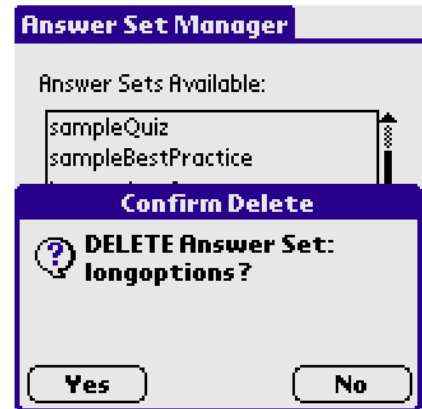
To add a Note:

1. Tap the Note button. The Answer Set Manager updates its display, allowing you to enter a textual comment. When you are finished, tap Ok to accept the comment, or Cancel to cancel the Note.



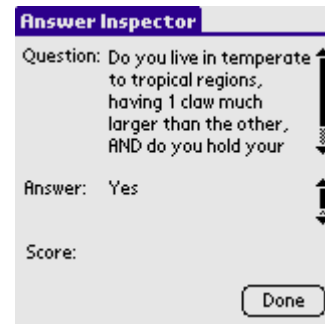
To Delete an Answer Set:

1. Select an Answer Set from the list, and then tap the Delete button. You will be asked to confirm that you really want to remove the answers.
2. If you are sure you want to proceed, tap Yes.
3. When you are finished deleting and/or adding comments to Answer Sets, tap the Done button.



To View an Answer Set:

1. Select an Answer Set from the list, and then tap the View button. The Answer Viewer will appear.
 2. From the Answer Viewer, tap the Session drop-down to select the session answer you want to review. The screen is automatically updated with the selected session's responses
 3. If a question or answer is too long to display in the table, you may “zoom in” and inspect it by tapping the applicable row. Doing so displays an inspector window that allows you to view the entire question, answer and score values.
 4. When you are finished reviewing answers, tap the Done button.
- Note: the Answer Viewer is “Read Only”; answers can be reviewed, but not modified from this window.

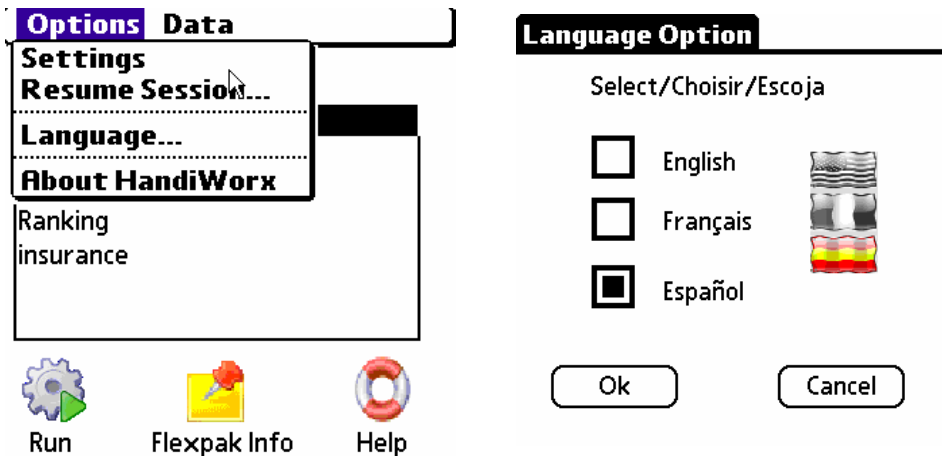


Changing Languages

HandiWorx has basic multi-lingual support for its user interface. The languages currently supported are English, French and Spanish.

To View an Answer Set:

1. Select an Language from the Options menu
2. Select the desired language, then press Ok.



What about HandiWorx WebExpress?

HandiWorx WebExpress is a “light” version of HandiWorx that operates in web browsers like Safari and Internet Explorer. HandiWorx WebExpress does not have any of the management features, nor the ability to save and resume sessions. However, the usage of HandiWorx WebExpress when running flexpaks is exactly the same as full HandiWorx.

HandiWorx WebExpress is only available as a deployment option from KnowledgeWorx – it is not a separately sold product.