CardVisor® ID Scanner

Version I & II User Manual

Age Verification Application for CardTool® Reader

(CardVisor version III details in CardVisor III manual)

TOKENWORKS™

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Age Verification Calculation Limitations

The CardVisor application is warranted to read the date of birth information encoded on the machine-readable (magnetic or 2D bar code) stripe and display the current age based on current date/time information contained in the handheld computers real time clock (RTC). It will also read other information on the stripe and present it to the operator. It should be understood that the displayed age may differ from the actual age of the person presenting the card for any one of a number of reasons. Among the most likely are:

- the card does not belong to the person presenting it,
- the encoded machine-readable stripe has been altered,
- the date of birth presented to the issuing authority was misrepresented,
- the issuing authority mis-encoded the date of birth on the card,
- the handheld computer real time clock is not set to the current date/time.

The above list of reasons is not exhaustive.

State and Local Privacy Laws, Ordinances or Rules

Some states and local government units regulate the who, how and what information from a driver's license can be electronically viewed or recorded. Check with the authorities in your jurisdiction before using the CardVisor product. Purchaser is wholly responsible for insuring full compliance with the laws of the jurisdiction wherein the product is to be used. TokenWorks fully disclaims any liability for any loss, damages or untoward circumstances that may arise from the inappropriate use of the product or of the data retrieved through its use.

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UM-040102-CC-R1	4/2/02	PC	Review
UM-040102-CC-R2	5/9/02	CC	Added Red highlights to Excel import screen shots
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UM-040102-CC-R7	12/19/02	CC	RawData Category, Button Preferences, Hard Reset, Trouble shooting chart, Exporting data from Palm Desktop
UM-040102-CC-R8	1/20/03	CC	Adding notes to swipe data (e.g. Banned/VIP indicator, phone, email info), Graffiti table.
UM-040102-CC-R9	3/23/04	CC	Append Note Feature (CV III feature) and non-duplicate subsequent swipe feature.

Table of Contents

About This Document

This document should be used in conjunction with the Handspring Visor user manual (on the Handspring CD or available on-line at Handspring.com) and the CardVisor Quick Reference Guide (on the CardVisor CD or available on-line at CardVisor.com). If reading Bar Codes, then please also reference the Bar Code Reader Cradle Quick Reference Guide (on the CardVisor CD or available on-line at CardVisor.com) for important information on scanning 2D bar codes.

The CardVisor age verification system consists of a version of the CardVisor software, a CardTool® reader, a Handspring Palm OS handheld computer, a HotSync cradle, connectivity software, and an optional bar code reader cradle with internal Li-Ion battery & charger. The bar code reader is necessary for licenses with a 2D bar code and no magnetic stripe (see coverage map for details).

The CardVisor system has a large transaction log, which saves the last 6,000 scans. It can process 6,000 cards on a single battery charge and the magnetic stripe version is all packed into a pocket sized 1"Dx3"Wx6"H. It is ideal for checking IDs wherever and whenever it's most convenient.

All versions of the CardVisor software save the basic driver license data with a date/time stamp. CardVisor II software adds the ability to record name, address and gender information, vital for enhancing customer contact. CardVisor III software adds a real-time VIP / Banned patron look-up capability to identify individuals when their license is swiped. It also allows notes to be appended via the main screen to the saved data for email, phone number, etc.

The CardVisor system is very configurable. You determine what the age threshold should be (18, 19, 20, and/or 21). Each can have a different audible alarm sound. The age display can be set for years (YY) or years/months/days (YY,MM,DD). There is even a long and short version of happy birthday which can be played if desired!

An optional 2D bar code cradle upgrade is designed for reading government issued drivers' licenses and ID cards, and sets a new benchmark for readability and ease of use. No need to "aim" or "focus", simply insert and remove the card.

Features

- Calculates Age based on encoded Date of Birth and provides visual and audible alarm if underage or expired.
- Scans Magnetic and PDF417 bar code driver's licenses with optional Bar Code reader cradle.
- Stores the last 6,000 parsed & unparsed license scans.
- License scan data can be PIN code protected
- Scroll, search and delete license data on device—no PC required.
- Transaction download software and cables included. No extra software to purchase.
- Configurable Audible Alarm on Under 18, Under 19, Under 20 and Under 21 check settings.
- Easy to use large touch screen display (160 x 160 pixels) with backlight.
- Small handheld form factor—Magnetic stripe only version slips into a shirt/coat pocket (only 3"W x 1"D x 6"L) - with optional Bar Code reader cradle, 3" to 5"W x 2.5"D x 10"L is handheld or desktop mounted.
- Handheld runs for weeks or 6,000 license swipes on 2 self contained alkaline or rechargeable NiMH AAA batteries.
- Configure Age display as years (YY) or years, months, days (YY,MM,DD)
- Includes Palm OS handheld computer with built in Palm applications Address book, Date book, Note Pad—run other Palm PDA applications
- Optionally Plays Long, Short Birthday Song
- Optional VIP/Banned Database capability (CardVisor III)

Encoded Stripe (Magnetic & Bar Code) – Formats & Reliability

Formats

The CardVisor ID scanner reads encoded information off the encoded (magnetic or 2D bar code) stripe of drivers license or ID card. While most states have the same basic information on the encoded stripe, the locations and format differ. From time to time, states will change how they encode the information on the stripe. Additionally, since most do not read what they've encoded, they sometimes make mistakes that become part of the issued card population. This may cause difficulty in parsing the data. When the software is unsure, it creates a memo in the MemoPad application that starts with the phrase "Trouble Parsing this data ->..." If you see a Memo like this, then please email it to support@tokenworks.com or email the entire MemoPad file (MemoPad.dat) and you will be one of the first to receive a software update that address this new license format.

The CardVisor ID scanner saves the original or 'raw data' from the encoded stripe as a separate memo in the MemoPad application. This unparsed driver's license data is given the RawData category in the MemoPad application (see category in top right part of MemoPad screen). This is done to provide a convenient method to cross check the parsed information, provide technical feedback to TokenWorks (new license formats) and record the additional fields from the driver's license such as eye color, weight, etc.

Reliability

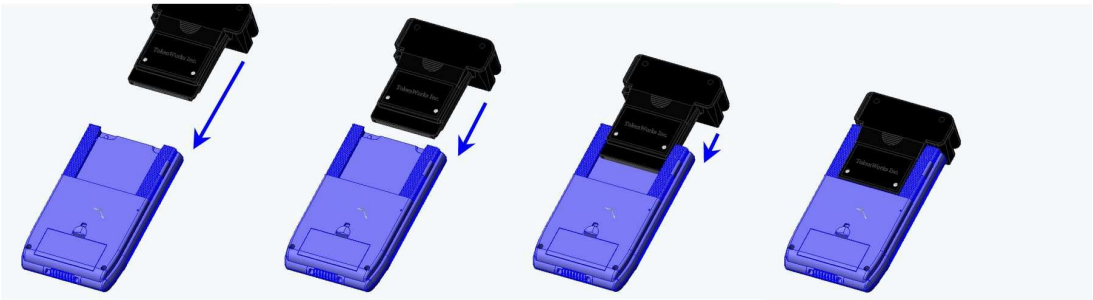
Driver licenses are exposed to varying conditions in a typical 4 to 6 year life cycle. Unlike credit cards, Driver licenses are not frequently swiped nor are they typically replaced if the encoded stripe is damaged. Therefore, read performance will vary with older licenses in typically poorer condition.

For licenses with Magnetic stripes, it is possible to read just Track 2 of a license since it is encoded at a lower bit density than tracks 1 and 3, and less sensitive to damage. Track 2 has the driver's license number, date of birth and expiration date. If the name does not appear on the screen, it is possible that Track 1 has become unreadable while track 2 is still readable. Note: The software must be able to read track 2 information to display the age and card status.

For licenses with 2D bar codes, make sure the bar code is not damage and that all foreign material is removed before reading. The level of error correction incorporated into the bar code varies between states so some states will scan with quite a bit of damage while others will not with just minor damage.

Inserting the CardTool

To insert the CardTool, align the unit with the Handspring expansion slot (see figure 1) and gradually insert the unit. It should insert smoothly until it makes contact with the expansion slot stops. Do not force the unit into the expansion slot. If resistance is significant, withdraw CardTool and ensure there are no foreign objects in the expansion slot and that CardTool is properly aligned with the Visor expansion slot.



Swiping Magnetic Striped Cards

1. With the CardVisor application running on the screen of the Handspring Visor, hold the unit in either the left or right hand. If the CardVisor is not active, select the CardVisor application icon from the 'desktop' or 'home' screen that shows all the application icons.

2. Using your other hand, position a magnetic card with the magnetic stripe (black stripe on back of card) facing the Handspring Visor at either end of the CardTool's card slot.

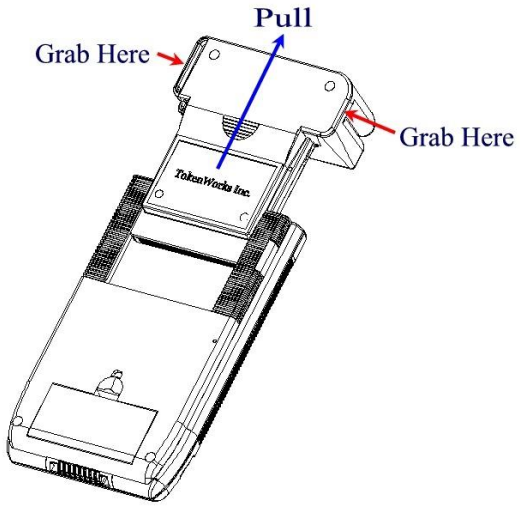
3. While ensuring that the magnetic card's edge remains in contact and parallel to the base of the card slot, swipe the card completely through the card slot.

4. It does not matter which way the card is swiped, but it is important that the card not be skewed during the swipe. Skewing occurs if the card is tilted or rotated as it is swiped through the slot. Tip: hold the magnetic card in the center and maintain pressure on the edge as it travels through the slot. Experiment with the orientation of the Handspring Visor. Some find it easier to hold the Handspring Visor with the screen facing left or right and swiping the card vertically through the card slot.

5. The 'CardVisor' application will update its display after a successful swipe and store relevant information it in the MemoPad database.

CardTool Removal

To remove the CardTool, either use the thumb stop on the back of the unit to gradually push it out of the expansion slot or grab the CardTool at the base of the card slot and pull it away from the Handspring Visor in the same plane as the expansion slot. Try not to grab the CardTool by the top and bottom but rather each side at the base of the card slot. Grabbing the top and bottom of the CardTool will generate a force component, which will increase the friction and make it harder to remove.



When the CardTool is removed from the Handspring Visor, the following takes place.

Applications that were automatically installed when the CardTool was inserted are automatically uninstall from the Visor application menu.

Note: If the Visor is turned off, removal of the CardTool (or any other module) turns the Visor on.

Helpful Hints

Adjusting Screen Contrast

Tapping the contrast icon with the stylus controls the contrast of the LCD display. The contrast icon is the small black and white circle in the lower left corner of the pull down menu square; tap it and a sliding bar will pop up to allow you to adjust the contrast.

The contrast icon is here —

Adjust the contrast by using the stylus to “grab” the slider bar on the contrast pop up.

Screen Backlighting Feature

There is a backlighting feature on the Visor, press and hold the power button down after you turn the unit on. The backlighting is helpful in low light conditions.

Reconfiguring Front Buttons

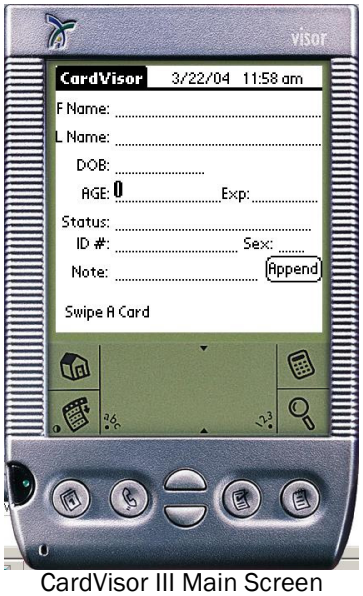
See the Quick Reference Guide for how to make the front silver buttons turn on and launch the CardVisor ID Scanner application. This is recommended for users who dedicate the unit to age verification.

CardVisor Application Installation

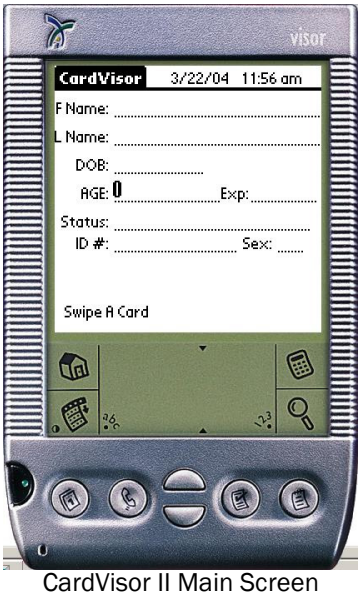
After plugging in the CardTool, CardVisor automatically installs and welcome screen appears. Click the OK button to launch the main screen of CardVisor, is shown below.

Make sure the date and time displayed in the top right corner of the screen is correct. To set the date/time, review the instructions provided in the Handspring User Manual or click on the 'Prefs' icon which is displayed after tapping the Applications Icon.

Make Sure Date & Time at the top of the form is current



CardVisor III Main Screen



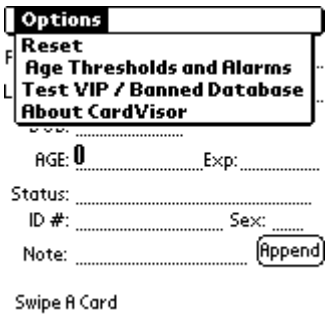
CardVisor II Main Screen

Main Screen Description

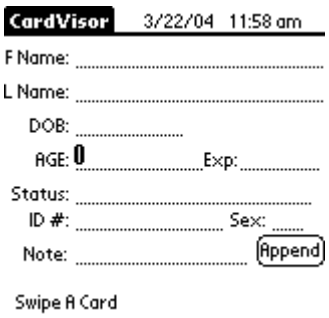
The main screen is where the magnetic card data and card status is displayed after each swipe. At the bottom of the screen is a dialog box where messages are displayed. In this area, card and status information is displayed after each swipe. If the card swipe was unsuccessful, the message "Swipe Again" will appear

CardVisor Options Screen

To access the options menu, click on the Menu Icon, just below the home icon in the graffiti area (see explanation below). Depending on the version of CardVisor software, there are three or four items on the Options menu. The Reset option will reset the CardTool hardware. If the unit is not responding to a card swipe, try the reset option.



Options Menu of CardVisor
CardVisor I and II do NOT have the 'Test VIP/Banned Database' item.



Screen After Reset Command.
NOTE: field and append button only on CardVisor III.

The 'About CardVisor' displays information on the application and its developer. The 'Reset' item will reset the card reader and display the message "Swipe A Card" in the dialog box if successful. If the unit still doesn't work after reset, see the trouble shooting section in this document. The 'Age Threshold and Alarms' item sets the age thresholds for various alarm events, alarm sounds, and display options. See the Age Threshold and Alarm section in this document for additional details. The 'Test VIP / Banned Database' item is only present in CardVisor III and should be run whenever a new Banned/VIP database is loaded into the handheld.

What is the Graffiti Area?

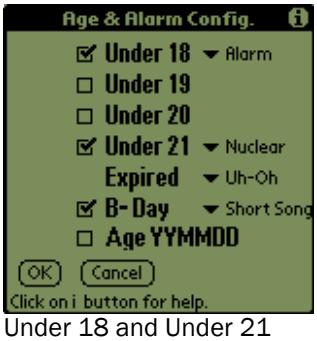
The Graffiti writing area is divided into two parts: one for writing letters, and one for writing numbers. The little "abc" or "123" at the bottom corners of the Graffiti writing area tell you where to write letters or numbers. You can also tap the "abc" or "123" to bring up the onscreen keyboard.

Age Threshold and Alarms

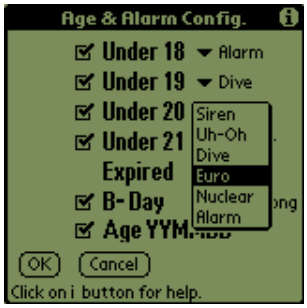
The Age Threshold and Alarm screen configures at what age CardVisor will alarm at and what alarm sound will be played. There are six sounds available for the under 18, under 19, under 20, under 21, and expired license conditions. After selecting a new sound, CardVisor will play it before updating the display.

The Expired alarm may not be disabled, only the alarm sound may be changed. The Happy Birthday song may be disabled by un-checking the check box. If checked, one may select either the long or short version of the Happy Birthday. The Visual indication of a birthday will be displayed on the main screen status line.

If the Age YYMMDD item is checked, then the age will be displayed in years months and days. This allows one to see how close somebody's birthday is and wish them a pre-happy birthday. If un-checked, then the age is displayed just in years.



Under 18 and Under 21 age alarms configured.



Pop Up menu for Under 20 Alarm

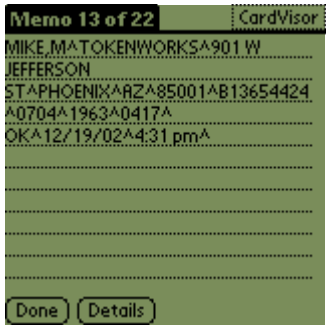
Happy Birthday Song – Long or Short Version

Memo Pad

CardVisor saves the track data to built -in Palm OS Memo Pad. By storing data in this way, it may be HotSynced to a PC and subsequently imported into PC desktop applications. For each swipe, two memos are created. The first is the parsed data from the Driver License; First Name, Last Name, Address, City, State, Zip, Driver's License number, Expiration date (YY/MM), Year of birth (YYYY), MMDD of birth, the status of the swipe (e.g. OK), the date and time of the swipe. Between each of these fields is a field separator characters (^). This character is important when importing the data into programs like Microsoft ACCESS or Microsoft Excel.

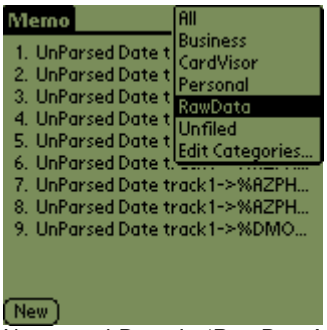
MemoPad showing all memo Categories

Parsed Data in CardVisor Category

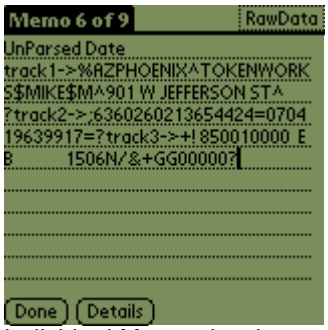


Individual Memo showing parsed data

The second memo created is the original or raw decoded data from the driver's license. This shows all the information actually stored on the stripe. It is collected primarily as a diagnostic tool to allow improvements in the parsing algorithms as states change encoding approaches. Thus, with the customer feedback, it is not necessary to continually request license encoding changes from 50 motor vehicle departments. If you see a license that is getting parsed correctly, please email both the parsed and unparsed memos to support@tokenworks.com. Shown below is the unparsed information that is categorized as 'RawData' and a detailed view of the raw data.



Unparsed Data in 'RawData' Category

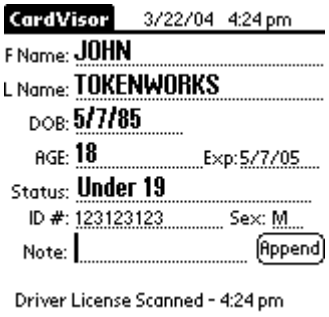


Individual Memo showing unparsed data

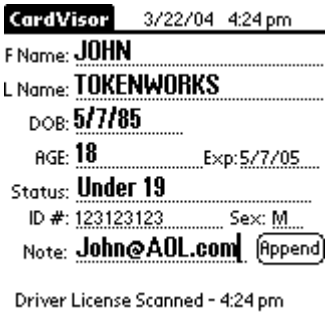
Before a new rawdata Memo is stored in MemoPad, the last rawdata memo is compared to the new pending Memo. If it is identical in every respect, including the date and time stamp, then the new memo is not stored. If the new Memo differs in just the time, it is still stored. This feature prevents redundant Memos for the same license swiped repeatedly in succession.

Appending Notes to License Data (CardVisor III feature)

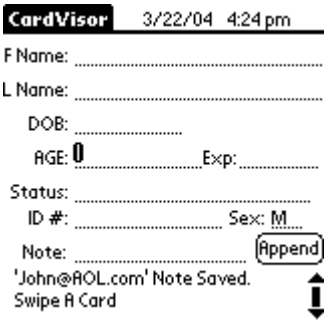
CardVisor III software allows additional notes (up to 80 characters) to be added to the Parsed License Data Memo. This is useful for recording marketing information such as phone numbers and email address or other significant information about an individual.



After License Scan



Input Note (email address)

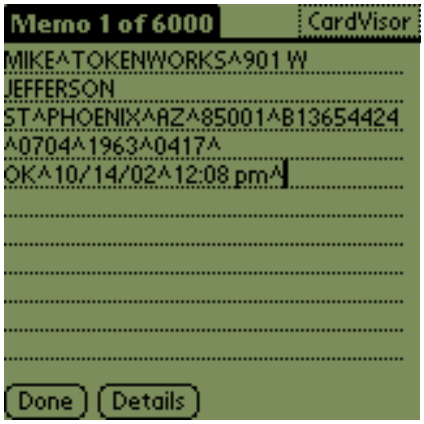


After hitting Append button – Note Confirmation Message

Only one note can be appended to a license that is swiped successively. In other words, if a license is swiped and a note is appended and the same license is swiped again and a new note is appended, the second note will replace the first note. If a multiple field note is desired, then insert the '^' character between each field when inputting the note.

Tip - Adding Notes to Swipe Data – Alternate to Append Note button

After a license has been swiped, it is possible to add one or more comments that will be uploaded to one or more columns in the Excel spread sheet. This is a great way for CardVisor III clients to mark a customer as a VIP or Banned individual. It is also an easy way to record additional fields such as email addresses or phone numbers. Whenever the Excel import wizard sees the ^ character, it puts the following data into the next column of the spreadsheet. At the end of each parsed string (CardVisor Category Memo), there is the carat character. Just tap the stylus at the end of the line and start making notes. Notes can be made using the keyboard or via Graffiti (see Graffiti chart in this manual).



Insertion point showing cursor after last carat (^) character

Adding data to a Memo entry using the 'Keyboard' instead of Graffiti.

Memo entry after adding 'VIP' to the end of the string

Memo entry after adding 'VIP' & email address to the end of the. Note: '^' character between fields

Additional columns can be added to the spreadsheet by appending additional ^ characters. See the Graffiti chart on how to write this character. Note: It is not necessary to have a carat symbol as the last character in the memo. Excel will put the last field in the proper column with or without a carat symbol at the end.

Maintenance and General Care

- The CardTool is not waterproof. Do not expose to rain or moisture.
- Do not drop the CardTool or subject it to strong impact.
- Protect it from temperature extremes. Do not leave on the dashboard of a car on a hot day and keep it away from heaters and other heat sources.
- Do not store or use your CardTool in any location that is extremely dusty, damp or wet.
- Ensure the magnetic heads are occasionally cleaned with commercially available magnetic cleaning cards.
- Clean exterior of case with dry lint free cloth and do not use abrasive cleaning products.

Battery Life

The CardTool does not have its own battery but instead uses the main batteries of the Handspring Visor. When the CardTool is installed in the Handspring Visor, it will draw current from the main batteries and thus reduce the life of these batteries. Every effort has been made to reduce the power consumption of the CardTool and this section should help users understand how the CardTool will change the normal life expectancy of the Handspring Visor's main batteries.

To conserve batteries, it is suggested that:

- When not planning to read a card, either power off the Handspring Visor or select another application such as the address book, memo pad, etc. This will put the CardTool into its sleep mode.
- If not planning to use the Handspring Visor for an extended period of time, remove the CardTool and/or the Handspring's main batteries (if applicable). Informal testing has shown that the normal 8-week alkaline battery life is shortened to approximately 3 weeks if this suggestion is not applied.
- For Handspring Visors with built -in rechargeable Lithium Ion batteries (Prism, Edge, Pro), return the unit to the charging base whenever not in use. Note: This is the normal operating procedure suggested by Handspring to ensure these models get their batteries constantly topped off.
- For Handspring Visors using alkaline batteries, consider purchasing rechargeable NiMH AAA batteries. A list of batteries/chargers is provided on the TokenWorks web site in the support section.

Trouble Shooting

Problem	Possible Problem	Possible Solution
Unit does not power up – No screen display	Batteries on Visor are installed incorrectly.	Reinstall batteries correctly. Make sure the (+) and (-) signs on the batteries line up with the signs on the inside of the battery compartment.
	Batteries are dead	Install new batteries
	Visor is hung	After installing new batteries, remove the CardTool reader and perform a soft reset. If this doesn't work, try a different set of batteries. If this fails, contact customer support.
	Hardware failure	Contact TokenWorks Technical support Note: if Handspring Visor not purchased from TokenWorks, then contact Handspring technical support at www.handspring.com
CardVisor is not decoding card data - *"swipe again"*	Magnetic stripe is dirty	Clean stripe with soft cloth.
	Magnetic Card may be damaged	Try another card.
	CardTool is hung	Run Reset menu item from main menu. If still experiencing problems, perform soft reset with stylus or paper clip
	Magnetic Card may be miss-aligned during card swipe	Ensure card is being held flush to base of card track during swipe. Try swiping at different speeds, in a different direction, holding the card at different locations, or changing the orientation of the Handspring.
	Firmware memory requires reflash	Remove and reinsert CardTool reader. If CardWelcome application automatically reflashes firmware, then this probably will resolve the problem. If not, Remove and reinsert CardTool reader again. Do not hit OK button to launch CardVisot but instead, select pull-down menu icon (below house icon in graffiti area), and tap on 'reflash now' menu item. This will force a firmware reflashed.
CardVisor does not respond to card swipe and does not display '*Swipe A Card*' message when first launched.	Firmware memory requires reflash	Remove and reinsert CardTool reader. If CardWelcome application automatically reflashes firmware, then this probably will resolve the problem. If not, Remove and reinsert CardTool reader again. Do not hit OK button to launch CardVisot but instead, select pull-down menu icon (below house icon in graffiti area), and tap on 'reflash now' menu item. This will force a firmware reflashed.
CardVisor application not visible on Main application launcher screen	Category not set to All or unfiled.	Select All or unfiled in the top right corner of the screen.
Swipe data not displayed in MemoPad Application	The MemoPad Category is set to display only personal or business memos.	Change Category to 'All' or 'CardVisor.' To see Unparsed license data, set category to 'RawData'

HotSyncing the Memo Pad


The Palm Desk Top Application ships with the Handspring Visor on the Green CD, contains software that synchronizes PC applications and the Handspring Visor. It is called the Hotsync Manager and if properly installed, the blue and red icon shown above should appear in the task bar in the bottom right corner of your screen. If not, please make sure the Palm Desk Top application is properly installed.

For the latest version, visit the Palm web site for a free copy at http://www.palm.com/support/downloads/win_desktop.html. For information and questions on installing the software on the Green Handspring CD, visit the Handspring web site support section at: http://support.handspring.com/esupport/start/hsWelcome.jsp and click on 'new users start here.' It is also advisable to read the 'Advanced HotSync Operations' chapter in the Handspring User Guide that is also on the Handspring CD. BEFORE HOTSYNC ANY DATA, MAKE SURE THE HOTSYNC PROGRAM IS PROPERLY CONFIGURED AND ALL IMPORTANT DATA IS BACKED UP.

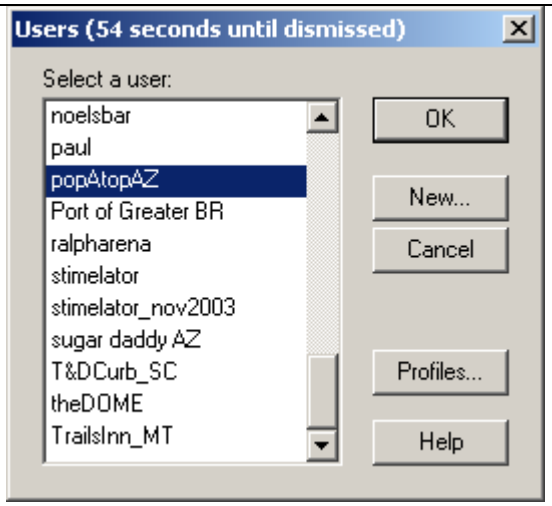
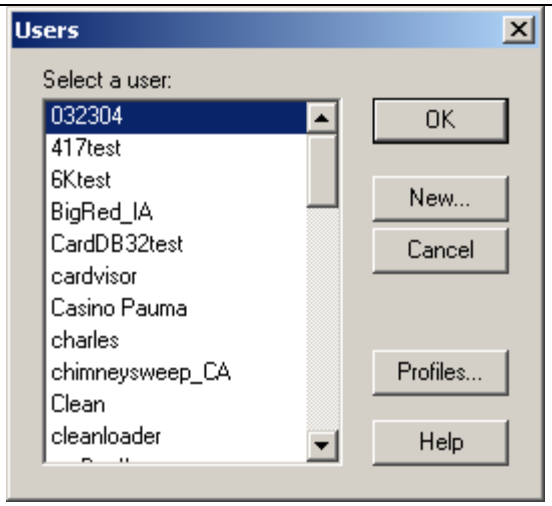
Also included on the Green Handspring CD is a program called Pocket Mirror that which will optionally install when installing the Palm Desk Top. It causes HotSync to use Microsoft Outlook INSTEAD of the Palm Desk Top application. These instructions require that Pocket Mirror IS NOT installed. If it has, it is possible to remove the application by going to the control panel, selecting add/remove programs, and removing it. It can be installed again from the CD if needed.
It is assumed that the reader is familiar with HotSync. If not, it is advisable to read the 'Advanced HotSync Operations' chapter in the Handspring User Guide that is also on the Handspring CD.

BEFORE HOTSYNC ANY DATA, MAKE SURE THE HOTSYNC PROGRAM IS PROPERLY CONFIGURED AND ALL IMPORTANT DATA IS BACKED UP.

First HotSync Operation & Setting HotSync User Name

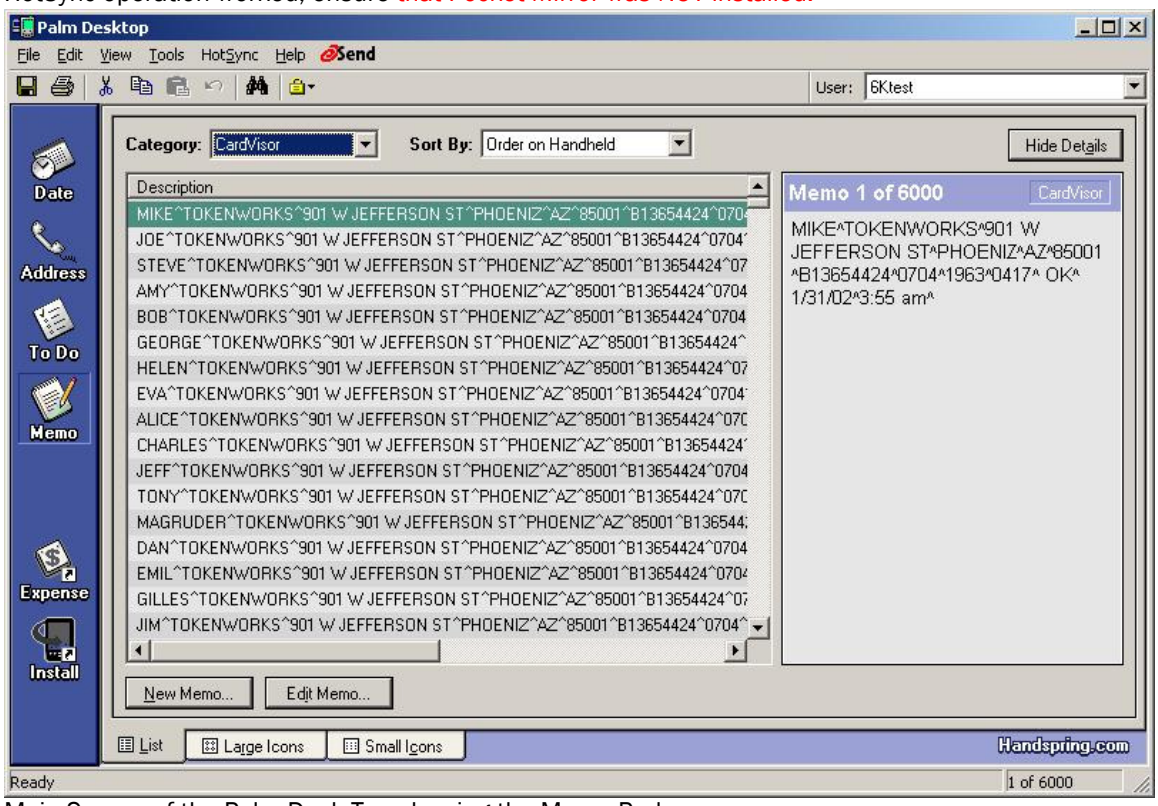
Assuming the Palm Desktop software has been installed and that the HotSync manager is running (look for Hotsync icon in system tray located in bottom right of the screen), it is time to perform the first HotSync which will 'syncronize' the data between the handheld and the Palm Desktop. Place the handheld in the HotSync cradle or connect it to the PC with a HotSync cable and follow the directions on the next page. If the HotSync window does not open on the Desktop computer: perform each of these steps in order. After each step, try to synchronize. If the HotSync operation succeeds, the problem is resolved and don't try the next step.

1. Is HotSync Manager on? Before you can synchronize, this software needs to be running. Turn it on if necessary.
2. Perform a soft reset: Here's how. This is a great trick for solving a number of problems.
3. Disconnect your device from the HotSync cable or cradle, and connect it again. Don't press the HotSync button until the device is fully connected.
4. Failure to communicate: Make sure that your desktop computer and handheld device are communicating properly.
5. Alarms pending? If any Calendar, To Do, SMS, MMS, voicemail, email or other alarms are awaiting a response from you, tap on "OK."
6. HotSync configuration: Make sure you have the right cradle/cable, and your HotSync software is correctly configured.

Hit the HotSync button on the cradle/cable and the following dialog box will display. Since this is the first Hotsync, there should be no user names so hit the 'New" button. Even if there are names already present, hit the New button. If an existing name is selected, then all the data associated with that name will be written to the handheld's memory and all the license data will be saved in the selected user name which may already have other data. So, hit the New button!	
Enter a New user name – use the date, e.g. 032204 instead of a name. This will help track subsequent HotSyncs and provide a means to retrieve historical data.	
After creating the new name, select it for the user name list and hit OK.	

After hitting OK, the Hotsync Progress box should display and confirm the Hotsync is taking place.	

Once Hotsync is complete, launch the Palm Desktop application, set the User name to the one just created (see user name pull down menu in top right corner) and click on the MemoPad icon on the left menu bar. Shown below is what the Main screen of the Palm Desktop with the Memo Pad active should look like. Check that the number of Memos matches the number of Memos in the Handheld. On the left, the Memo is highlighted and on the right are its contents. If there are no Memos and the HotSync operation worked, ensure that Pocket Mirror was NOT installed.



Main Screen of the Palm Desk Top showing the Memo Pad

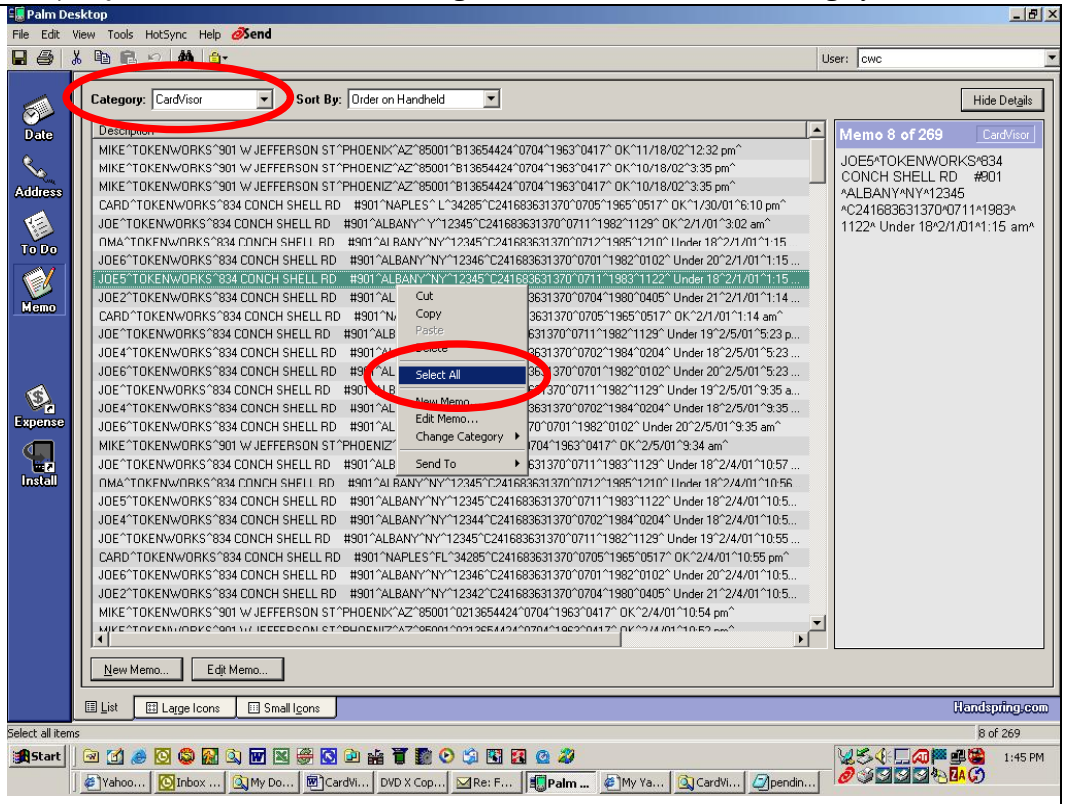
Exporting Data from Palm Desktop

The Palm Desktop application allows all or selected Memos to be exported in several common formats including comma delimited, tab delimited format, and text. This document will use text since CardVisor puts field delimiters in the data (^ character) which the import wizard of Excel and Access can recognize. To start the process, first select the memos, which are to be exported. It is possible to

export all or just a subset of the memos to be exported by highlighting the desired memos. Follow the directions below to export just the Memos which are categorized with the "CardVisor" Category.

1.) Set the Category to "CardVisor" - See Category box circled in RED on right.

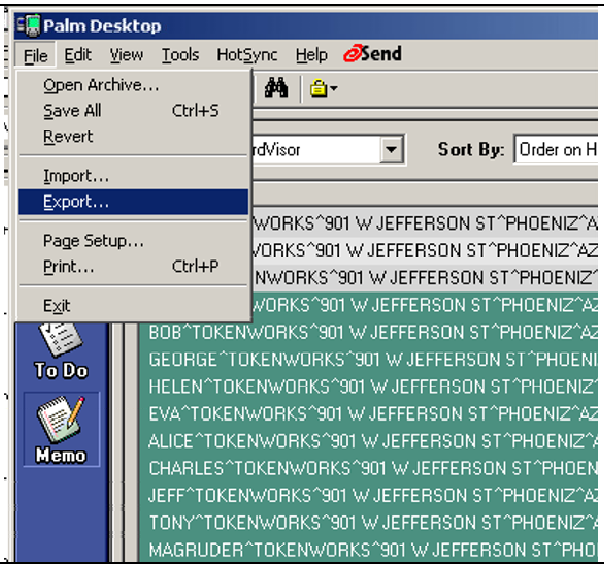
2.) Place the mouse cursor in the middle of the 'Description' window and right click. This will open a small menu, select the 'Select All' menu item. See RED circled on right.

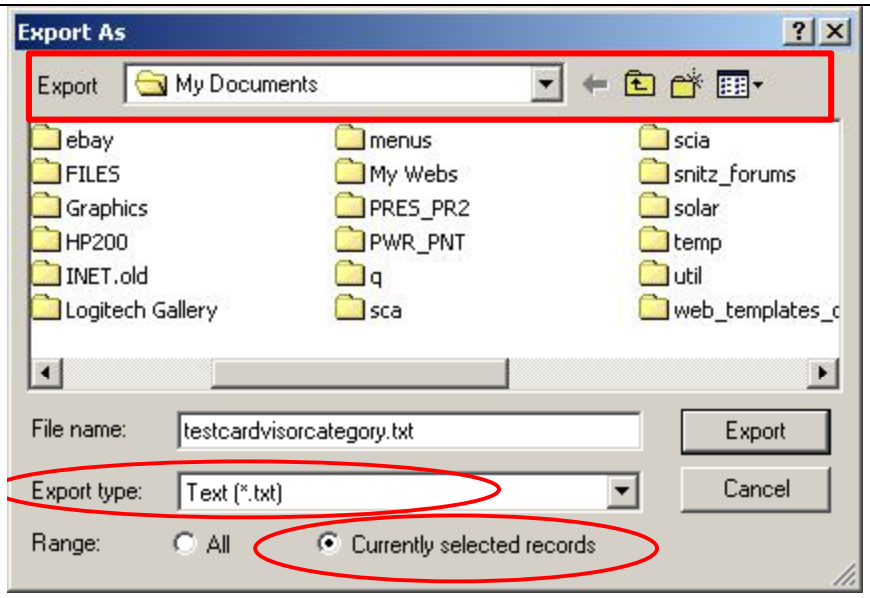


Then, from the main File menu, select the Export option.

Palm Desktop –> File -> Export

This will launch the Export As window that determines the file name, format and storage location.



Export As Window	
First select the file folder in the Export Window where the file should be saved. Use the Pull Down arrow to change directories. Then Set the Export type as Text (*.txt) as the file Export type Then set the Range for 'Currently selected records' Finally, enter a file name that contains the date(s) of the license captures. This will help identify the file later Click on the Export button.	

Important: Make sure the file extension is " .txt" and not " .csv" since files with the "csv" file extension will not cause the Excel import wizard to launch. If accidentally used, the *csv* file extension can be rename to *txt* by the file manager and no harm will be done.

After hitting the Export button, the program will ask which field of the Memo Pad should be exported. There are three fields in the Memo Pad application; Memo, Private and Category. The Memo field contains the track data, the private field indicates whether the Palm OS should treat the record as private, and the last field is the category. For this example, only the track data will be exported so just check the Memo items.

Specify only the Memo Pad field for Export

1.) Check the Memo item
2.) Uncheck the Private and Category items
3.) Hit the OK button

After this window closes, the data will be exported and saved to the export file. The Export complete message box should be displayed.

The next step is to import the information into Excel or Access. For this example, Excel will be used, as it is familiar to more people than Microsoft Access. However, the import wizards for both products are very similar so these instructions would also apply to Access.

Deleting Data from Handheld

After the license data has been transferred to the Palm Desktop application, the easiest way to delete the old license data from the Handheld is to do a Hard Reset. By performing a Hard Reset, all the license data on the handheld will be erased and when the next HotSync is performed, select a new Hotsync user name, again using the date. By HotSyncing with a new user name after each hard reset, each user name will hold the data for a specific time frame and provide a method to view historical data.

Warning: A hard reset will erase everything on your device.

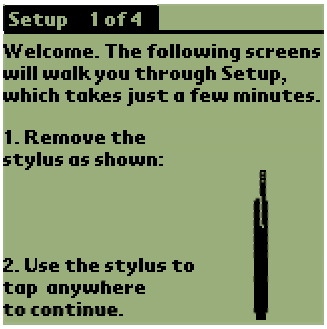
REPEAT WARNING - A HARD RESET WILL ERASE ALL TRANSACTION DATA

Don't perform a hard reset unless you've backed up your data, or you're willing to lose everything.

To perform a hard reset:

1. Hold down the power (on/off) button on your device. The power button on Visor organizers is on the front.
2. While holding down the power button, turn over your device so that you can see the back of it. Using the reset tool, an unfolded paper clip or a similar small blunt-tipped object, gently press the reset hole on the back. See Where's the reset hole in the CardVisor Quick Reference Guide.
3. When the device's screen displays the Palm Computing Platform logo, release the power button.

4. A message will appear warning that you are about to erase all the data stored on your handheld. In response, do one of the following:
   - Press the up scroll button on the front panel of your handheld to complete the hard reset, erasing everything on your device
     or
   - Press any other button to begin a soft reset, leaving your data intact.
5. Your device will then take you through a series of screens to calibrate the digitizer and verify the time and date.



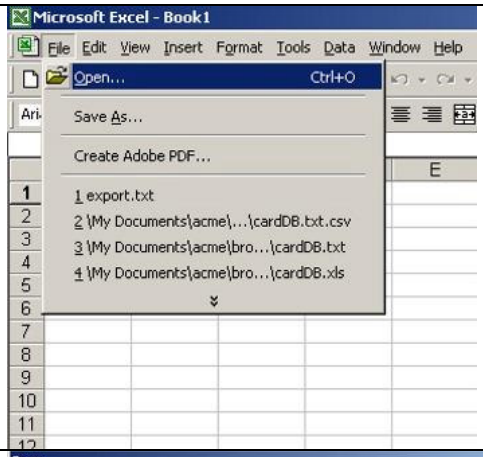
Note: A hard reset does not delete the current date and time. It does restore other settings to the factory default. .

Remember that the next time a HotSync is performed; select a NEW HotSync user name, preferable one incorporating the current date. By following this procedure, each HotSync user name will contain the license data from the previous HardReset date to the current HotSync date which will then allow for easy retrieval of historical license data.

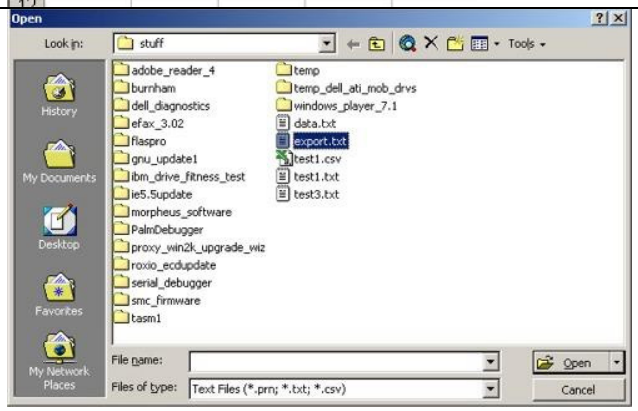
Importing MemoPad Data to Microsoft Excel

Excel and Access provide very nice data import wizards. These instructions were based on Excel, but should apply to ACCESS. To use these wizards, from the main menu of Excel, select the File, Open item.

1.) Click on the File -> Open menu item. This will launch the Open Dialog box shown below.

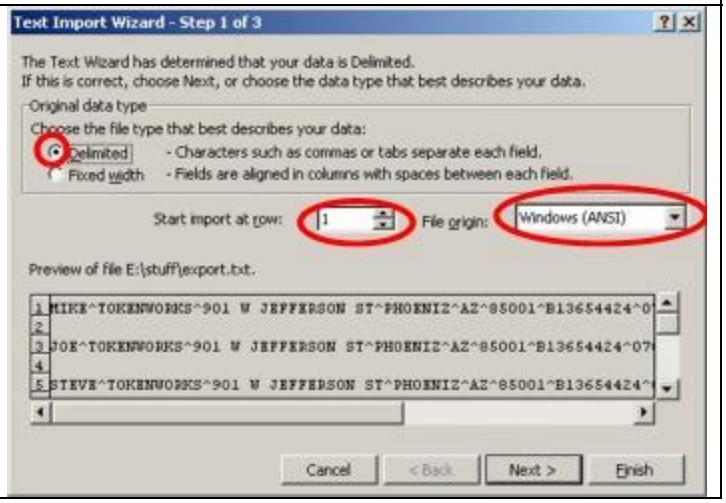


2.) Select the directory which contains the exported memoPad data.
3.) Change the file type to Text Files (*.prn, *.txt, *cvs)
4.) Select the correct file (e.g. export.txt) or type the correct file name into the file name text box.
5.) Hit the open button.



After pushing the Open button the Excel import wizard will launch. This Wizard determines how the data in the file will be interpreted when imported in the Excel spreadsheet.

1.) Select the Delimited radio button
2.) Start import at row 1
3.) File Origin Windows (ANSI)



In the second step, the Wizard asks how the fields are to be delimited.

1.) Check the 'Other' delimiter option
2.) Uncheck the tab, space, semicolon, and comma options.
3.) Type the carat character '^' into the 'Other' delimiter text box
4.) Hit the next button

Note: Once you enter the carat character into the text box, the Wizard will put vertical lines in the Data preview window. Make sure the lines are shown in the appropriate locations before proceeding.

The final step in the process is to indicate the format of the data in each column.

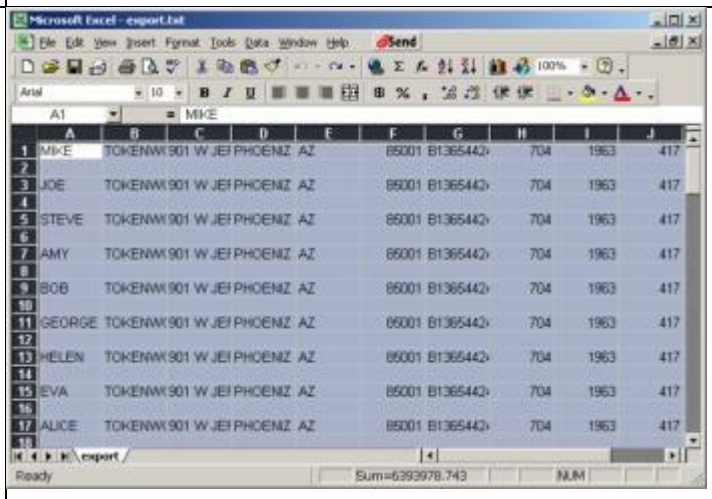
1. Hit the Finish Button

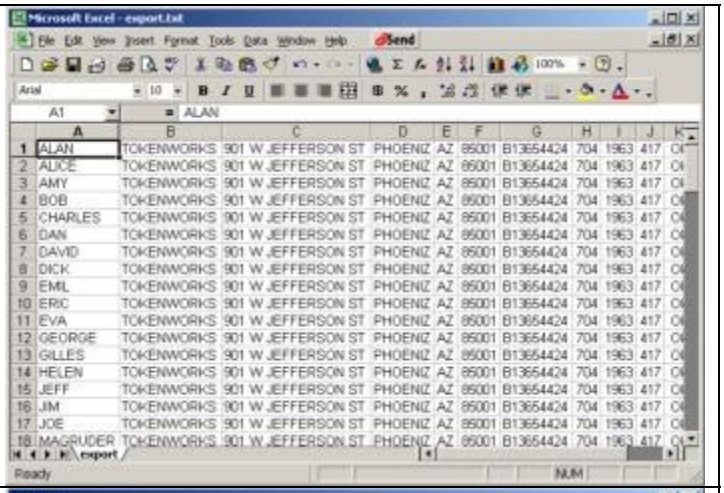
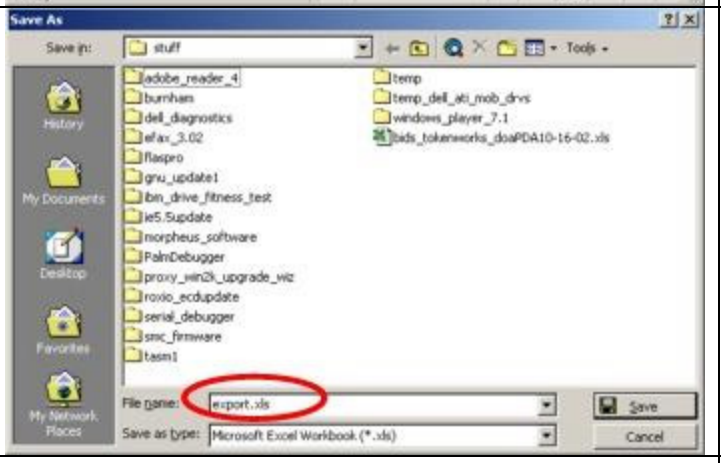
Note: For mailing labels, General is fine on all columns. If certain information should be treated differently, this screen allows it to be formatted appropriately.

That is basically it. After hitting the finish button the data now has been imported into Excel.

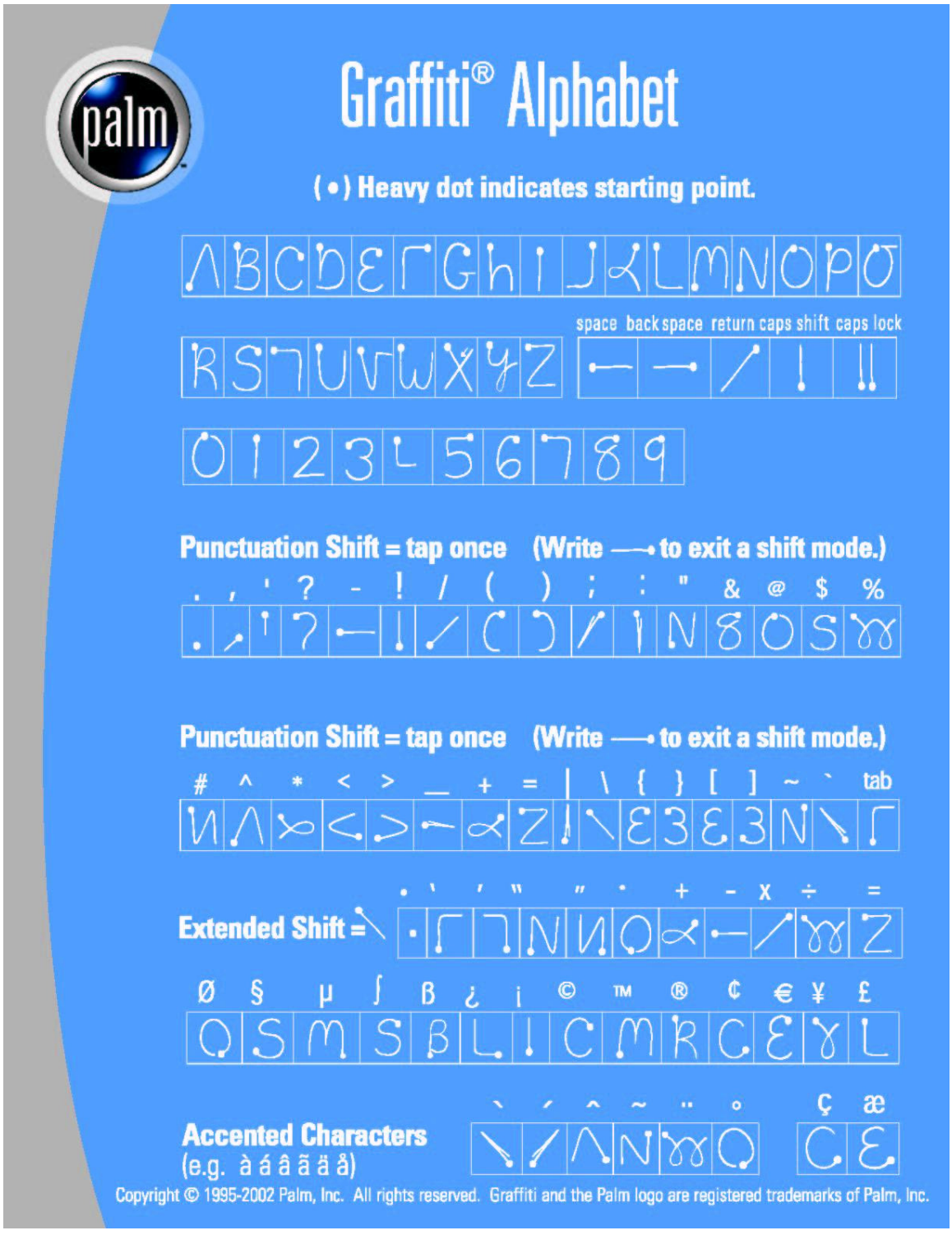
Shown here is what the imported data will look like in Excel.

Note that the first name is in column A, the last name in column B, address in column C. Also note each entry is in its own row and that in this example there are blank rows between each row of license data.



To remove the empty rows in the data, just hit the sort button  . Or select the Data -> Sort menu item to sort the entire spreadsheet. Here is the spreadsheet after the sort button has been pushed.	
The final step in the process is to save the new Excel spreadsheet. Select the File -> Save As menu item. This will launch the Save As dialog window shown on the right. Enter the desired file name and type. In the example shown, the file type is Microsoft Excel Workbook (*.xls) and name is 'export.xls.'	

Graffiti Table



End of Document.