Trip™ and Trip Deluxe User Manual

Hands High Software

Trip and Trip Deluxe User's Manual version 3.00

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Getting Started

Trip™ and Trip Deluxe save you money by making it easier for you to track and categorize your automobile mileage for business and nonprofit use. The IRS lets you deduct these miles from your taxes.

If you have ever tried the paper and pencil method of tracking miles, you know what a pain it is, especially if you use different cars for different uses. In fact, it can be so much of a discouragement that you might not do it, which will cost you money.

Trip will automatically remember the ending mileage of the last trip for the car you are currently using. It will automatically record the date and time. It will automatically compute the distance you drove from the start and end amounts. And it will total all the miles for a particular car and/or a particular category.

Trip makes recording your miles so easy...even fun, that you won't forget to record them again!

If you create mileage reports, Trip Deluxe makes mileage tracking even easier, by automatically exporting your Trip information to your desktop computer every time you synchronize your Palm device. In addition, Trip Deluxe includes a Trip Report Generator, which helps you create a custom report in Microsoft Excel.

System Requirements

Palm OS

Trip is compatible with all devices running Palm OS 2.0 and above. This includes the PalmPilot Personal, PalmPilot Professional, Palm III, IBM WorkPad, and any device that has a Palm upgrade card installed.

Trip is not compatible with the original Pilot 1000 or Pilot 5000, unless it has been upgraded with a Palm upgrade card.

Macintosh OS

Trip for the Macintosh requires OS 8.0 or above. In addition, Microsoft Excel 5.0 or above is required to run the Trip Report Generator included in Trip Deluxe.

Windows OS

Trip for Windows requires Windows 95, 98, 2000 or NT. In addition, Microsoft Excel 97 or above is required to run the Trip Report Generator included in Trip Deluxe.

Installation

To install Trip, simply start the installer and follow the directions. The Trip installer for Windows is named "TripInst.exe", and the Trip for Macintosh installer is called Trip Installer.

The Trip installer will install the following files for Windows:

- Trip.prc—the Palm Trip program. This will be in your install directory ready for transfer to your Palm device.
- TripMan.pdf (this user manual)

The Trip Deluxe installer for Windows will install the following files:

- Trip.prc—the Palm Trip program. This will be in your install directory ready for transfer to your Palm device.
- TripMan.pdf (this user manual)
- Trip Report Tool —a Microsoft Excel spreadsheet that helps you create reports.
- Tripcond.dll —the conduit that transfers information between your Palm and your desktop computer when you synchronize. This will be in your Palm directory.

On the Macintosh, your will see the following files:

- Trip.prc—the Palm Trip program. This will be in your install folder ready for transfer to your Palm device.
- Trip Manual (this user manual)

Trip Deluxe for the Macintosh includes these files:

- Trip.prc—the Palm Trip program. This will be in your install folder ready for transfer to your Palm device.
- Trip Manual (this user manual)
- Trip Report Tool —a Microsoft Excel spreadsheet that helps you create reports.
- Trip Conduit—the conduit that transfers information between your Palm and your desktop computer when you synchronize. This will be in your Conduits folder in your Palm folder.

After you install, put your Palm device in the cradle and press the HotSync button. This will transfer the Palm component of Trip to the Palm device.

Creating Cars

You may track mileage for up to 16 cars in Trip. To set up your car list, start Trip on your Palm device, tap the Menu button at the bottom of your screen, and choose Edit Cars from the menu. You will then see the following screen.

Edit Cars Screen

Note that you have a default car called "Car". The first thing you should do is rename this car to the name you want to use for your car.

To change the name of a car, tap the name of the car, then tap the Edit button. When you rename a car, that cars name will change on all the trips that are associated with that car.

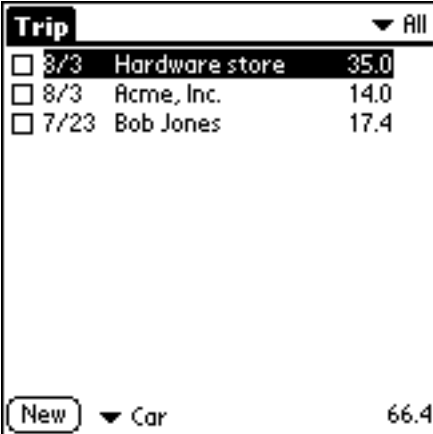To create another car, tap the New button. Enter the name of the car you want to create.

To delete a car, tap the delete button. Whenever you delete a car, all the trips that are associated with that car are permanently deleted, so use this option with care. If you delete the last car, a new car will automatically be created with the default name of "Car" so that there is always at least one car in the program.

Viewing the Trip List

The List View displays the trips you have entered. Each trip will show a checkbox, a date a description, and a mileage length for each Trip. The trip list is sorted chronologically, with the most recent trip at the top of the screen.

Trip Screen

```
┌────────────────────────────────┐
│ Trip                   ▼ All    │
│ ☐ 8/3   Hardware store    35.0  │
│ ☐ 8/3   Acme, Inc.        14.0  │
│ ☐ 7/23  Bob Jones         17.4  │
│                                 │
│                                 │
│                                 │
│                                 │
│                                 │
│ (New)  ▼ Car              66.4  │
└────────────────────────────────┘
```

At the bottom of the screen, you will see the total mileage for the trips.

Filtering Trips

The trip screen shows the trips for a particular combination of categories and cars. To display only the trips for a particular category, select the category from the popup list at the top, right of the screen. To display the trips for a particular car, select the name of the car from the popup list at the bottom of the screen.

You will notice that when you change the category or car being displayed, the mileage total changes to reflect the total miles for all the trips in that particular car/category combination.

One way to use categories is to identify business miles verses mileage for nonprofit or church use. The IRS lets you deduct mileage at different rates depending on your purpose. See the Hands High Software Web site at http://www.handshigh.com/ for a summary of IRS regulations for recording mileage and pointers to IRS publications for more details.

Changing What is Displayed

Choose Preferences from the options menu to control what text gets displayed in the main list.

Preferences Screen
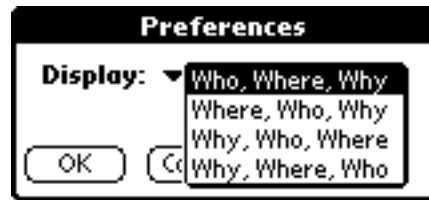
The options listed let you select which field has priority over the other fields. In other words, if you choose "Who, Where, Why", then the Who field of each record will display first. If a particular record does not have any text entered in the Who field, the Where field will be displayed for that trip, and so on. If none of the fields have text in them, then the contents of an attached note will be displayed.

Entering Trips

To create a new Trip, tap the New button at the bottom of the Trip list screen. You will then see the Edit screen.

Edit Screen

Selecting a Car

Whenever you create a new trip, the starting mileage for the car selected is automatically copied from the ending mileage of the previous trip for that car. For example, if the last trip you took in your Chevy ended on 1234.5, then the starting mileage for this trip would be 1234.5.

Change the car by selecting it from the list. The starting mileage will then automatically change to reflect the ending mileage of the last trip for the new car you select.

Entering Mileage

Tap on the starting mileage box or ending mileage box to enter mileage into these fields. You will then see the mileage selector screen.

Mileage Selector

Change a number by doing one of the following:

- Tap on a number, hold your pen down, and drag up to increase it, or down to decrease it.

- Tap on the number you want to change, and tap the "+" button at the right side of the window to increase it, or the "-" button to decrease it.

- Tap on the number you want to change, then enter the number into the number graffiti area in your Palm device. You will see a small black line under the number that is currently being edited. This line will automatically move to the right so that you can enter a string of numbers quickly and easily. To move the line to the right, either tap the number you want to edit, or stroke from left to right in the graffiti area. To move the line to the left, stroke from right to left in the graffiti area.

You may also quickly add or subtract one mile at a time by pressing the page up or page down hardware button on your Palm device.

Press "Done" to accept the new mileage.

After you enter your ending mileage, the trip length is automatically calculated. You can also enter the trip length directly into the Len field.

Entering Start and Stop Times

Your starting date and time is automatically entered when you create a new Trip. To have Trip automatically enter the end date and time, tap the small watch icon next to the end time box when your trip is over. You can also edit the date and time fields directly by tapping on the value you want to change.

Entering Who, Where, Why and other notes.

The Who, Where and Why fields help you organize the information for a trip. You can enter up characters in any of the fields, or none of them.

Tapping the down arrow next to the Who field will bring up your address book, allowing you to select a contact directly from this list.

Tapping the down arrow next to the Where and Why fields will bring up a list of shortcuts that you have saved. To add an item to the list of shortcuts, enter the information, and then choose "Add to Where List" or "Add to Why List" from the Options menu. To edit your list of shortcuts, choose "Edit Where List" or "Edit Why List" from the options menu.

To further describe a trip, tap the note icon and enter your information into the Note screen.

Making a Trip Private

Tap the private checkbox to mark a trip as being private. Private trips are not shown in the trip list when your Palm device's security features are turned on. Tap the Applications button, and then tap on the Security application to hide and show private records.

Duplicating a Trip

If you frequently make trips to the same location, the Again item in the Trip menu will save you time. By tapping the menu button and selecting "Again" from the Trip menu, the currently displayed Trip will be duplicated, but the date and time fields will be set to the current date and time, and the starting mileage will be set to the ending value of the last trip for the selected car.

Creating Reports With Trip Deluxe

The following information applies to only Trip Deluxe. To create a report using Trip standard, see the chapter titled "Exporting your Trip Data".

Every time you HotSync, the Trip Deluxe data in your Palm device is transfered to the "trip.csv" file on your desktop computer. This is a comma-separated-value file that can be read by Microsoft Excel, or another spread-sheet program, and you can use this information to create reports from your trip data.

We have included a Microsoft Excel spreadsheet program with Trip Deluxe that will help you create a report from your trips. To run the report, you will need Microsoft Excel 5.0 (also known as Excel 95), or higher on a Macintosh, or Excel 97 or above on Windows. To start the report generator, double-click on the Trip Report Tool icon in your installation folder, or in Windows, choose it from the Start menu under the Hands High Software menu.

Trip Report Screen

To create a standard report, simply click on the Report button. A new spreadsheet will appear with your Trip information.

You can customize the report in many ways. You can easily add and remove columns, and filter your information by checked status, date,car, category and more. For complete instructions on customizing the report, click the Customize button and follow the directions.

Exporting Your Trip Data

If you are using Trip Deluxe, you probably will not need the information in this chapter, as the Trip Deluxe conduit automatically exports your Trip data every time you synchronize. However, in special circumstances, you may want to export your trips to the Expense program in your Palm device. For example, your company may have an automated system that gets mileage information from the Expense program.

If you are using the standard version of Trip, follow the directions below to Export your information to either the Memo Pad, or the Expense program.

Export Dialog
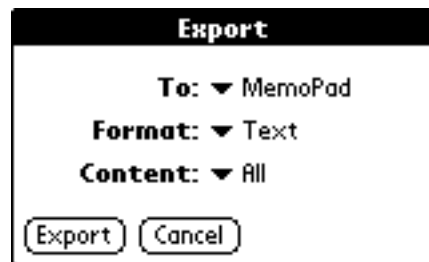
Exporting to the Expense program

To export to the built-in Expense program of your Palm, tap on the Menu button of your Palm device, and choose "Export" from the menu.

Choosing "All" from the Content list will export all of your trips. Choosing "Shown" will export all the trips that are shown in the list view according to the car and category combination selected. If you are showing all cars and all categories, this is the same as exporting "All". Select checked to export only the checked items that are shown by the car and category combination selected.

Each trip record will appear in the matching category in the Expense program. If there is no matching category in the Expense program, it will appear in the Unfiled category.

Exporting to the Memo Pad

Exporting to the memo pad puts your information into your memo pad in a form that is readable by a spreadsheet program. To export to the memo pad, choose Export from the options menu, and select "Memo Pad" in the To: field.

Choose the format for the export from the Format buttons. The "Text" format separates fields with a tab character, and each record is separated with a return. This is a good choice for exporting to a word processor. The "CSV" format separates fields with a comma and each record with a return. This is a good choice for exporting to a spreadsheet.

Choosing "All" from the Content list will export all of your trips. Choosing "Shown" will export all the trips that are shown in the list view according to the car and category combination selected. If you are showing all cars and all categories, this is the same as exporting "All". Select checked to export only the checked items that are shown by the car and category combination selected.

After you export, the data will appear in the Unfiled category in the Memo Pad. To get this information to your desktop, you must first put your PalmPilot organizer in its cradle and press the HotSync button. After HotSyncing, find the information in the Memo Pad, and copy and paste it to the program of your choice.

If you are pasting to a spreadsheet program like Microsoft Excel™, you may have to set the program up to correctly interpret the tab or comma separated information. See your user manual for information on converting text to columns in your spreadsheet application.

Purging

After you have used Trip for a while, you will have a number of trips that you no longer care about and want to delete. To delete a group of trips at one time, select "Purge" from the Options menu in the List View.

Purge

Purge Records

Before: [Fri 1/14/00] ▼

☐ **Checked Items Only**

☑ **Archive copies on PC**

(Purge) (Cancel)

Enter the date before which you want to purge records into the Before area. You can either click the date to bring up the Date selector, or select an item from the drop down menu next to the date.

Remember that Trip will purge records that were entered before this date and will not include records entered on this date.

If you want to purge just checked items, click the checkbox next to "Checked Items Only."

If you are using Trip Deluxe, you will see the "Archive copies on PC" checkbox. If you check the "Archive copies on PC" box, your purged trips will be saved on your desktop in the "triparch.csv" file when you syncronize your device. This will let you maintain a complete history of all your trips for your records. You can open the triparch.csv file using Microsoft Excel, or another spreadsheet or word-processing program.

Backing Up

Every time you HotSync, the HotSync manager automatically makes a copy of your Trip database and puts it on your desktop computer.

The name of the backup file is "TripDB.PDB". It is located in the backup directory of your user directory. For example, if your Palm software is installed at C:\Palm\ and your user name is Joe Shmoe, the backup file would be:

C:\Palm\jshmoe\backup\TripDB.PDB.

It is a good idea to occasionally save a copy of your backup directory in case your hard disk crashes or your Palm organizer has a problem.

Restoring a Backup

On rare occasions, your Palm organizer may have a problem that requires you to reinstall your backup file. Do the following steps in order to reinstall TripDB.PDB file.

1) Make a copy of your current TripDB.PDB file.

2) If Trip is not installed, follow the installation instructions at the beginning of this manual to install Trip.

3) Start the Palm Install Tool application. This is the same application you used to install Trip.

4) Install the TripDB.PDB file the same way you would install a Palm application by clicking the Select button, selecting the file, and clicking the Install button.