



## Office To-Go™ For Pocket PC

Pocket PC Solution for Office Therapy®  
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### Introduction

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Office To-Go (OTG) is a Pocket PC application for Office Therapy. It is designed to provide a mobile solution for Office Therapy users giving them the ability to view and update important information while away from their PC.

### Features

- View and add/edit contact information for Clients, Insurance Companies, and Referral Sources.
- View Provider information.
- View and add/edit Appointments and Events.



### **System Requirements**

PC Requirements:

Office Therapy Version 5.0 or higher

Current Maintenance Contract for Office Therapy

Pocket PC Requirements:

Running Windows CE 4.20 (or later)

Required memory 64 MB

Application size around 250 KB (additional 1-2MB of storage space for SQL Server 2005 Mobile Edition)

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## Installing Office To-Go

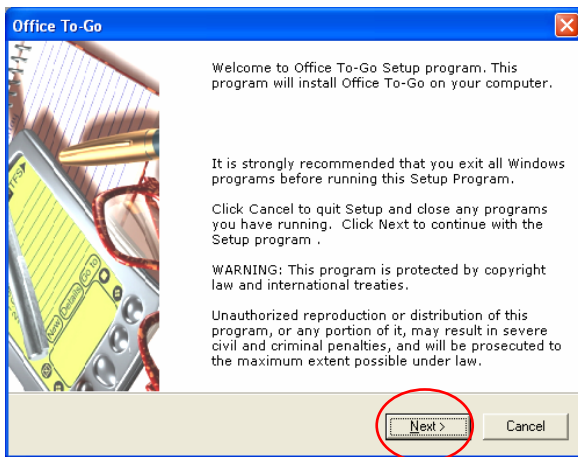
Installing, Sync Manager Settings, 1<sup>st</sup> Sync

Make sure that your Pocket PC is physically connected to your computer and that you have the ability to transfer files back and forth between the pocket PC and your desktop/laptop computer.

Installing from a CD:

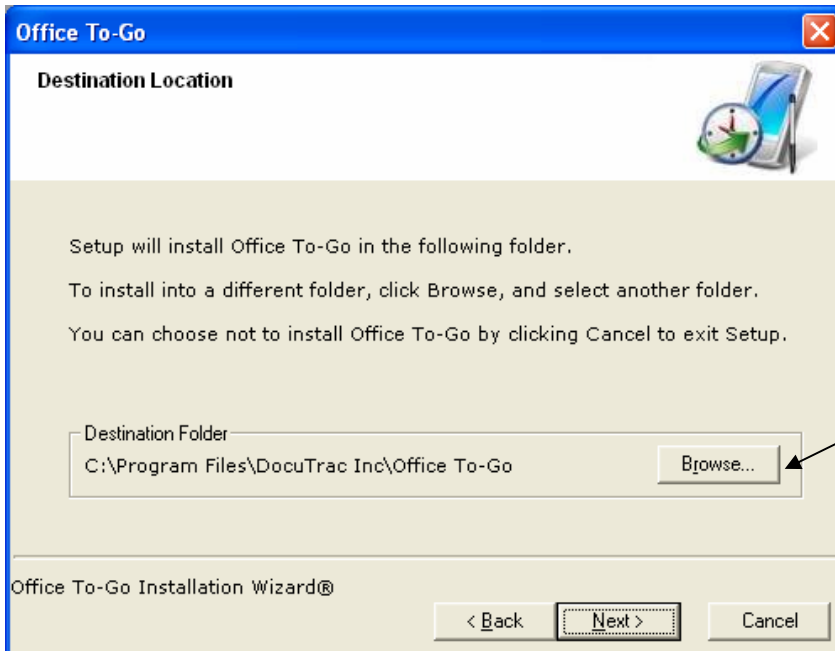
Before beginning the installation, save all current work and exit all applications. Insert the CD in your CD-ROM drive. In most cases, this will automatically start the installation process. If it doesn't, then click the **Start** button, select **Run**, type D:\SETUP.EXE (where "D" specifies your CD drive), and press Enter. The setup program will guide you through the installation.

The installation wizard will guide you through both installing the application to your pocket PC and your desktop/laptop PC.



When the installation begins you will see the following screen.

Click **Next**.



The next screen allows you to change the directory where the program will be installed on your Desktop PC.

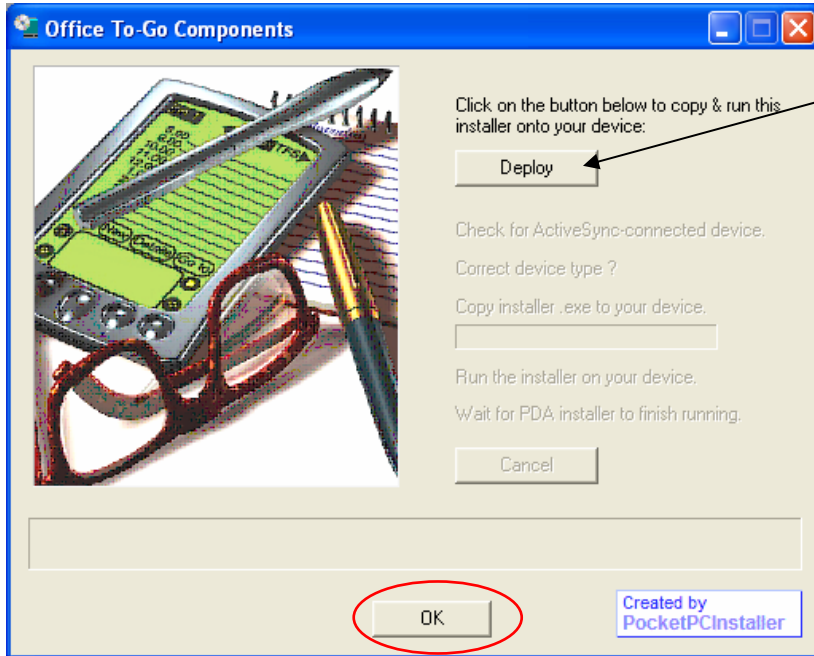
The default path for the destination folder is displayed.

If you wish to change destination folder, click on **Browse** and select the folder you want to use.

Once the path is set, click **Next**.

On the following screen you will see some files being installed on your Desktop PC.

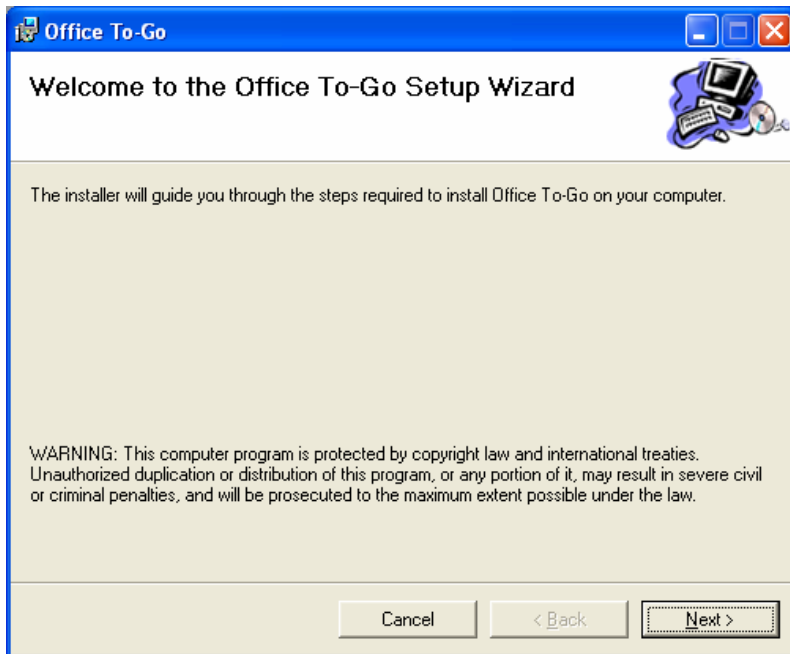
You will then see this screen:



Click **Deploy** on this screen. This will copy and install the files to run Office To-Go on your Pocket PC.

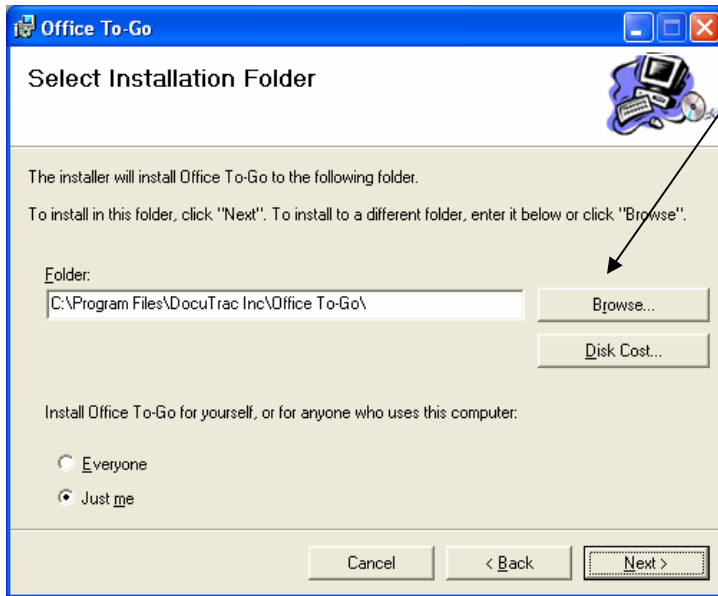
Your Pocket PC screen should show the files being installed.

Once installed to the Pocket PC, click **OK** to finish installing the program on your Desktop PC.



Click **Next** in the Office To-Go Setup Wizard to continue the installation.

On this screen you will be able to set the path to install the program on the Desktop PC.



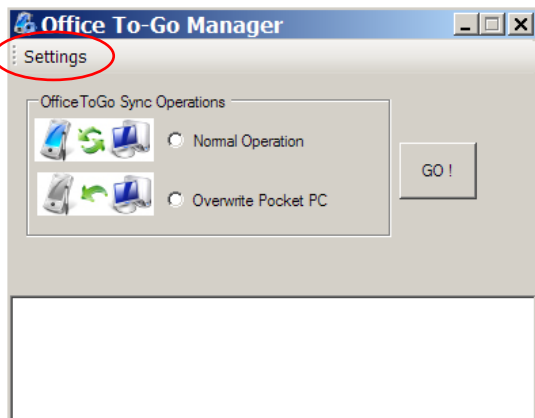
To change the default path click **Browse**.

Set the access level. Select **Just me** if you are the only Windows user to have access, or select **Everyone** if you want every user in Windows to have access to the program.

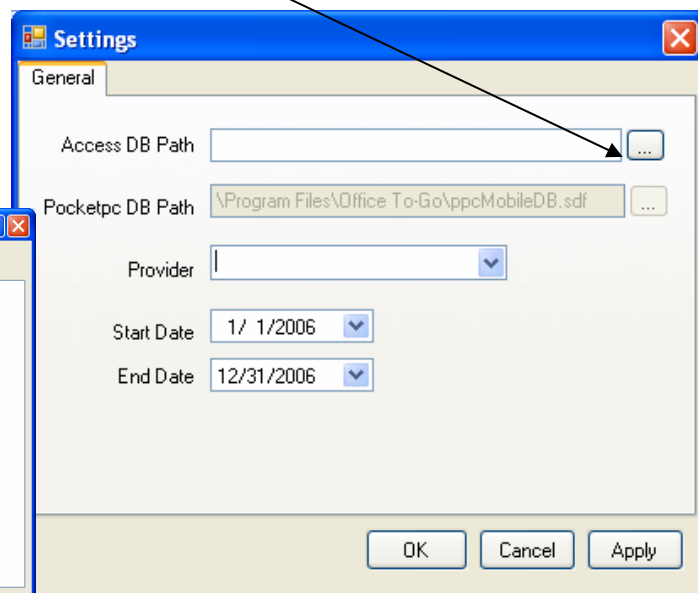
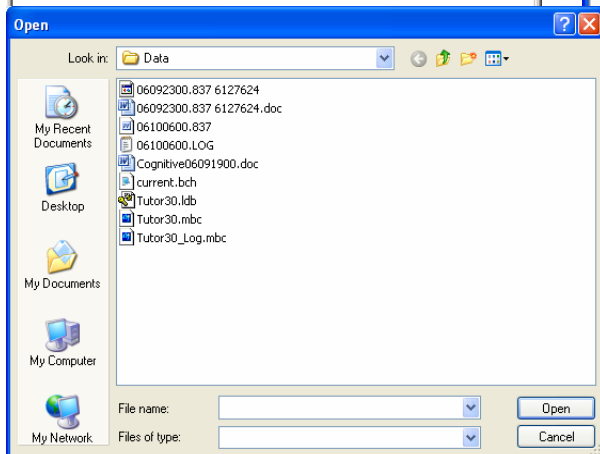
Once these two items are setup, click on the **Next** Button. You will then see a progress indicator of the installation. Once that has finished installing on the Desktop PC the program will again install some files to the Pocket PC.

Once the installation is complete you should see the Office To-Go Manager window.

Click the Settings button to open the following menu:



Click on the **...** button to locate your Office Therapy database.



Navigate to and select your database, and click **Open**.

You can verify the name and location of your Office Therapy database by opening Office Therapy and selecting the **Help...About Office Therapy** menu item.

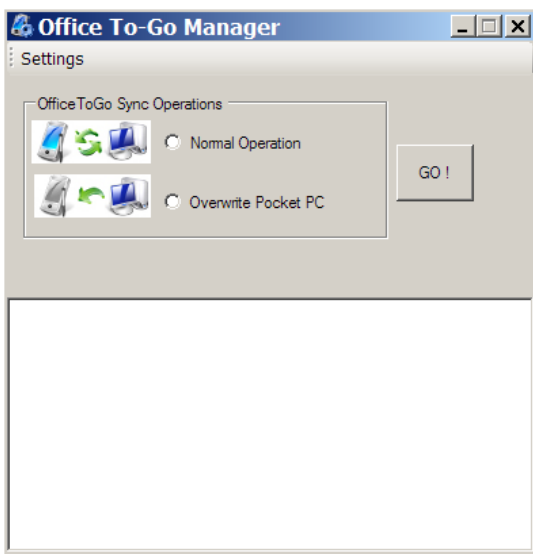
In the Settings window use the **Provider** drop-down menu to locate the provider name you want to sync with Office To-Go.

Additionally you can address the start and end date for the sync. Appointments prior to the start date or after the end dates specified will not be synched to the pocket PC.

Once all of this information is setup, click **OK** to return to the previous screen.

## Office To-Go Sync Operations

Select the option you would like to use:

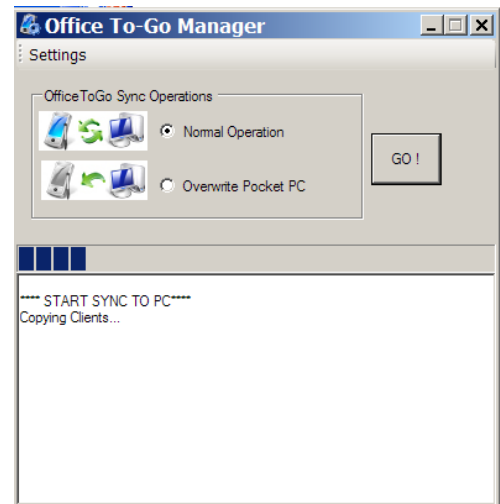
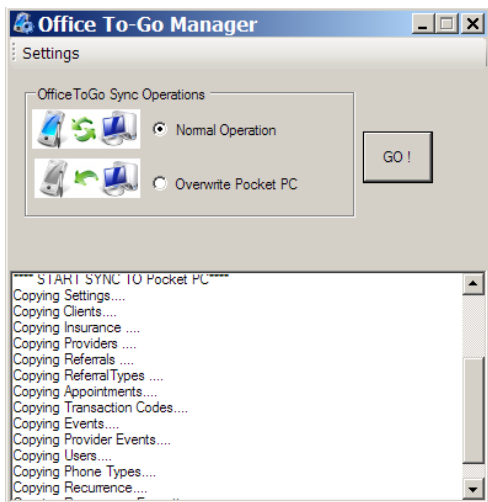


**Normal Operation** refers to sharing information between the Pocket PC and the Desktop PC interchangeably, so any new information entered on the Desktop will show on the Pocket PC and vice versa.

**Overwrite Pocket PC** refers to replacing all information on the Pocket PC with what is in the Office Therapy database on the Desktop, without taking any information out of the Pocket PC. **This is the option you should choose for your first sync.**

Once you select an option click **GO!** You will see a progress bar across the middle of that window while data transfer is taking place as shown below.

Once the data transfer is complete the progress bar will go away leaving the details of the transfer in the lower part of the window as seen here:



At this point you may either minimize the program or close it. The next time the Pocket PC is connected to the Desktop it will automatically run this program.

## Running Office To-Go

Start Office To-Go by visiting your Window's menu on the pocket PC and selecting Office To Go.

Office To-Go opens with a Login screen similar to the login screen in Office Therapy.

1. Select the Login UserID from the drop-down.
2. Enter your password.
3. Tap Login.

Office To-Go opens with a list of icons (calendar, clients, insurances, providers, referrals, settings, about, and logout).

Office To-Go Login screen showing a Username field (TUTOR) and a Password field, with a Login button.

## Registering Office To-Go

Office To-Go comes in Demo mode with 30 uses. You can register anytime during the demo period or after the uses have expired.

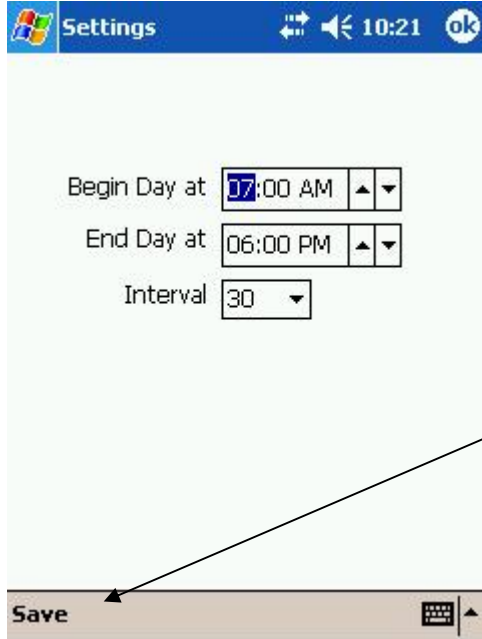
To register Office To-Go, contact DocuTrac (DTI) at 800-850-8510. You will be asked to provide a Registration Key and Registration Code. A DTI Sales representative will provide you with an unlock code allowing unlimited use.

1. Start the Office To-Go application.
2. Tap the ABOUT icon, then click the word REGISTER in the lower left-hand corner.
3. Give the DTI Sales Representative the Registration Key and Code numbers.
4. Enter the Unlock Code provided by the DTI sales representative and tap Register. You will receive a message confirming successful registration.

Office To-Go Software Registration screen showing fields for Registration Key (28533048), Registration Code (16804634), and Unlock Code, with a Register button.

## Settings

Tap the Settings icon to access the settings for the calendar.



Here you can change the begin day and end day time, as well as the time interval displayed in your calendar. Once set, click SAVE to save your changes.

## Navigating Through Office To-Go

Office To Go consists of Client, Insurances, Referrals, and Provider list views, a day, week, and month calendar view, and a Settings screen that allows the user to customize the beginning, end times, and time interval for their calendar.

To start, click on the appropriate icon for the information you would like to view.



## Client List



The client list consists of the names and phone numbers from the Office Therapy database you have chosen for the sync. You can view specific client details by tapping on the client name, and tapping on Details in the lower left-hand corner of the screen. Once in the client details screen, you can click on Edit to edit the information which will be transferred to Office Therapy the next time you sync.

Additionally, new clients can be added to the Office To Go database by clicking the word New in the lower left-hand corner of the client list.

To exit the client list, click OK in the top right-hand corner of your list view.

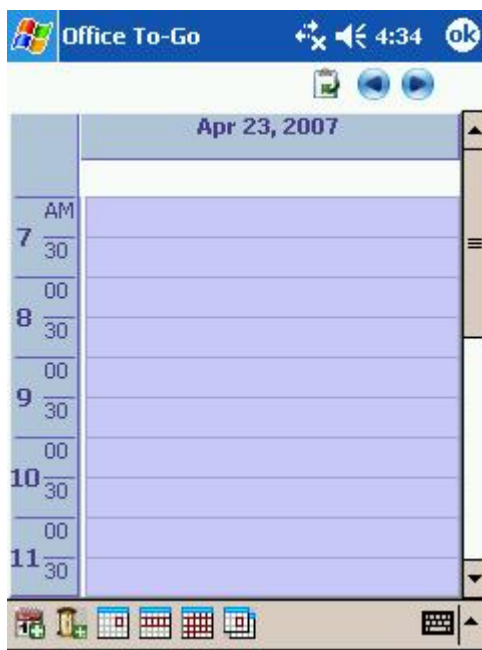
## Insurance Companies and Referral Sources, Providers

The procedures to view, search, and add/modify insurance companies and referral sources are the same as described above in the Clients section.

The Provider List and details are read-only. You can only view information about providers. Use Office Therapy on the PC to add new providers or update information about providers.

## Appointments and Events

Office To Go allows you to view appointments and events for the time interval established by tapping on the Calendar icon. You can also add new appointments and events, or modify appointments. The calendar view is specific to the default provider established in the Sync Manager setup.



To go to the Calendar view, tap the Calendar icon. Tap day, week, or month view icons (at the bottom of the screen) to view the calendar in these different views. Appointments/events are listed based on the time interval (e.g. 15, 30, 60 minutes) established in your Office To Go Settings.

To navigate from day to day or week to week, use the < or > buttons at the top right of the screen. To go to a specific date, tap the **month view, or week view buttons and navigate to that day.**

The Week View shows a grid with the days (Mon, Tues, Weds, Thurs, Fri, Sat, Sun) in columns. Appointments will appear in corresponding time rows. Tap each appointment to view its details at the top of the week view.

### Add a New Appointment

New appointments are associated with the default provider established in the setup. To add appointments for other providers, use Office Therapy. You can alternatively change the default provider in the Sync Manager. When you do this you will have to use Windows ActiveSync to save any changes on the Pocket PC to the Office Therapy database on the PC, and then sync the new default provider's data.

There are several ways to add a new appointment:

Go to the Calendar view (day or week.) Tap the New Appointment button.



In the day, week, or month view, simply tap and hold on a day or time period and select New Appt.

Use the ellipses  button for a list of clients. Tap a client.

Enter the start date, start time and duration.

Enter the Charge Type using the ellipses button for a list.

To add notes, tap the Notes tab. Enter a note and tap **Save**.

Tap **Save** to save the appointment. Tap **Cancel** to cancel and return to the last screen.

### Editing an Appointment

Go to the Day or Week view. Locate the appointment to edit and tap it. Make changes. Tap **Save** to save changes. Tap **Cancel** to cancel and return to the last screen.

### Deleting Appointments

Go to the Day or Week view. Locate the appointment to edit and tap it. Tap Delete.

## Events

### Adding an Event

There are several ways to add a new event:

Go to the Calendar view (day or week). Tap the New Event button. 

In the day, week, or month view, simply tap and hold on a day or time period and select New Event.

Enter a name for the event.

Enter the start date, start time and duration of the event.

If it is an All Day event, check the All Day checkbox.

To choose providers for the event, tap the Choose Providers tab. Check the Providers for whom this event applies. To remove a provider from the selected list, simply uncheck the provider to remove. When done, tap **Save**.

Tap **Cancel** to return to the previous screen without saving.

## Modify or Delete an Event

To modify or delete an event, select the event from the day or week view. Make changes and Save or tap Delete.  
Note: If you want to modify or Delete a **recurring** event, use Office Therapy on the PC.

## **Synchronizing Office Therapy and OTG**

To synchronize Office Therapy and OTG, connect your pocket PC to the cradle (or sync cable) and wait for Windows to initiate a sync. Refer to your pocket PC unit instructions for how to perform an ActiveSync in Windows.

The Office To Go Manager will automatically start on your computer allowing you to adjust your sync settings if needed.

When you sync, the following rules and steps are used (default is Normal Sync):

1. Any new records (Clients, Insurance Companies, Referral Sources, Appointments or Events) on the pocket PC are written to the Office Therapy database on the PC.
2. Any modified records (Clients, Insurance Companies, Referral Sources, Appointments or Events) are updated on the PC, unless the information has been updated on the PC more recently.
3. If a record has been modified on the pocket PC, but has been deleted on the PC, the record is added back to the PC.
4. Any changes on the PC are then sent back to the pocket PC.

**Important:** If you plan to move or change the name of your Office Therapy database on the PC, be sure to sync first to avoid potential data loss from changes made on the pocket PC. Then HotSync after the database has been moved or changed once you change the database name or location in your Sync Manager settings.

The size of the OTG database and resulting speed of the OTG application will depend on several factors – the number of your active clients in your Office Therapy database and the time interval you set for synchronizing appointments. To improve performance and speed, limit the number of clients synchronized by making sure to inactivate clients you no longer see. Also limit the time interval you are using to synchronize the calendar.

## **Technical Support**

For questions about OTG contact DocuTrac, Inc. Technical Support at 301-766-4130. Support hours are Mon.-Fri. from 9-5 E.S.T.. You can also fax your questions to 301-766-4097 or e-mail at [support@quicdoc.com](mailto:support@quicdoc.com).