

# WSI Leader's eBook



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*Software Solutions for Military Leaders...*

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## Overview of the Leader's eBook

The **Leader's eBook** enables military leaders to manage personnel information associated with each soldier and to perform daily administrative tasks in a more efficient and timely manner. The **Leader's eBook** is comprised of modules that can reside on both your PC and on a mobile PDA device. With the **Leader's eBook** you no longer have to use paper documents in the field that have to be reentered into your office computer – everything is electronically coordinated. The **Leader's eBook** allows easy access to the same information in your office as in the field.

Open the **Leader's eBook** by clicking the icon on your desktop. From the main menu screen you can generate reports, export or import data, backup or restore the **Leader's eBook**, install the program on your PDA, synchronize with your PDA, register your product, or generate a **Morning Report**.

There are two components to the **Leader's eBook**. The first is **Personnel**. This component includes information about the individuals for whom you are responsible, including military specific information, personal, family, medical, uniform sizes, APFT, CTT, education, certifications, qualifications, licenses, awards, equipment, and personally owned vehicles and weapons. You can add other miscellaneous data as needed. Information on these individuals can be entered and maintained in the **Leader's eBook** either on your PC or PDA. Syncing the two on a regular basis will ensure both of your systems have complete information all of the time.

The second component is the **Leader's Guide**. It is a source of reference for the small unit leader and is based on the The Army's **Combat Leaders Guide**. The **Leader's Guide** is great for hip pocket training and as a quick reminder of the numerous tasks a leader must accomplish to complete the mission.

**NOTE: The Leader's eBook** can be used on a PC without the integration of a PDA, but can be installed on a PDA and integrated into the system at any time. By integrating a PDA, you maximize the capabilities and usefulness of the the **Leader's eBook** software.

### Navigation buttons

- Select Soldiers From** – allows user to restrict access to a specific unit or rank
- Clear Selections** – returns **Select Soldier From** to default of all in each category
- Leadership** – Under this button you will find **Acronyms** and leadership references.
- Personnel** (Icon with three arrows) – access **Warrior Personnel** program
- Roll Call** – Status of each soldier in the unit, i.e., generates the **Morning Report**
- Install to PDA** – installs **Army Leader's eBook** software to your PDA
- Sync to PDA** – synchronizes **Army Leader's eBook** data on your PC with your PDA
- Reports** – previews and print reports
- Register/Buy** – **Army Leader's eBook** registration and purchase information
- Export/Import** – export and import soldier data to transfer between different PCs
- Backup/Restore** – backup data and restore data from the **Archive** folder

## Registration and License

The **Leader's eBook** is distributed with a 15-day trial so that you can try all of its features before buying it. To continue using your copy of the **Leader's eBook** after the 15-day trial period you must register the software program by purchasing a license from Warrior Solutions or by registering a prepaid license.

To purchase the **Leader's eBook** online visit our website at [www.WarriorSolutions.com](http://www.WarriorSolutions.com) and go to the **Purchase Now** page. You can also purchase the **Leader's eBook** by emailing us at [Sales@WarriorSolutions.com](mailto:Sales@WarriorSolutions.com), or by contacting us by mail or phone:

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Warrior Solutions accepts Visa, MasterCard, and American Express credit cards. Once you have completed the purchase/registration, Warrior Solutions will supply your **Key Words** and **Key Code** by return email. To complete the registration, type in your **Key Words** and your **Key Code** and click **Register**. The license for this program belongs to one individual only and cannot be shared. The **Leader's eBook** cannot be returned once you have purchased and registered your copy.

If you move the program to a different PC or PDA, you must also move the license. Please keep your **Key Words** and your **Key Code** in a safe place. Once you move to a new computer, reinstall the **Leader's eBook**, and then re-register it on your new computer.

If you have problems registering the **Leader's eBook**, please contact Warrior Solutions by email at [Support@WarriorSolutions.com](mailto:Support@WarriorSolutions.com) or by calling us at 303-415-2074. Our normal business hours are 8:00am to 5:00pm MST, Monday through Friday.

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## Release Notes

### **Release 3.01 -- October 01, 2003**

Corrected minor problems with standard report formats  
Corrected minor problems with format of PC & PDA pages

### **Release 3.0 -- September 01, 2003**

Combined Pocket PC and Palm OS versions.  
Added Custom Tables  
Added Report Writer  
Added capability to import from other databases.  
Added auto calculation for Physical Fitness Test (APFT)  
Added auto calculation for Body Fat measurement  
Added Leadership module  
Retained all other features of 2.x retained

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## Install the Leader's eBook to your PC

To get started using **The Leader's eBook**, you will need to install new software on your office desktop PC. (If you choose to run **The Leader's eBook** on your PDA, you will need to install the **eBook** onto your PDA device as well.)

Ensure that your computer meets the minimum system requirements:

- a) 75 MB of free disk space.
  - b) 64 MB of RAM.
  - c) CD-ROM or DVD-ROM drive (if you load from a CD)
  - d) Microsoft Windows 98/NT/ME/2000/XP.
  - e) Microsoft mouse or compatible pointing device.
- 1) Close all programs that are running on the PC.
  - 2) Load the **Leader's eBook** either from a CD or from software downloaded from the Warrior Solutions website: [www.WarriorSolutions.com](http://www.WarriorSolutions.com).
    - a) *CD Installation.* Insert the **Leader's eBook** CD into your CD-ROM drive. The CD should start on its own; if it does, go to step 3. If it does not start, click the "**Start**" button, and then click "**Run**". In the "**Open**" box, type the path and the file name of the Setup file on the CD. That is, type the drive letter of the CD-ROM (typically D:\) and the word "**Setup**". For example, you might type **D:\ Setup**, then click "**OK**".
    - b) *Download Installation.* Find the **Leader's eBook** setup file "Setup.exe" that you downloaded. Double-click on this file to install the **Leader's eBook**.
  - 3) Follow the instructions that appear. We recommend that you select **Typical** and accept the default path for the installation of the software.
  - 4) After the software installs, you can access the program by selecting the **Leader's eBook** from the Windows Start|Programs menu or from the the **Leader's eBook** icon on your desktop.

## Install to Palm OS® Device

Ensure that your Palm OS® PDA meets the minimum system requirements

- a) Palm OS® 4.0 or later.
- b) 2 MB of free memory.
- c) Serial or USB HotSync® cradle.

There are 3 main steps to install the **Leader's eBook** to your Palm OS device:

- A. Setup desktop and Palm to HotSync
- B. Download **Leader's eBook** software to Palm
- C. HotSync **Leader's eBook**

A. Setup desktop and Palm to HotSync. If you have not already done so --

- 1) Install the "Palm Desktop" on your computer (Palm Desktop comes as part of your Palm install disk)
- 2) Verify that your Palm device successfully hot-syncs with your desktop machine, and that the time/date on the PC and PDA are the same.
- 3) If you can hot-sync your Palm device with your desktop machine, continue...

B. Download **Leader's eBook** software to Palm device

- 1) To install Leader's eBook onto the Palm device of a user who has never hotsynced to your desktop:
  - (a) Open the Palm Desktop
  - (b) Click on menu selections Tools/Users/New
  - (c) Enter the user name of the new Palm device
- 2) Verify that your PDA synchronization software is running on your computer. If not running, start it up from within your desktop PDA software. For most Palm OS devices, look for the HotSync icon in the lower right of your computer screen. If not running, you can start it from the Windows Start menu by selecting menu items Start|Programs|Palm Desktop|HotSync Manager.
- 3) Open the Leader eBook program on your PC. From the main menu click on **Install to PDA**, then click on **Install to Palm OS Device**
- 4) Follow the on-screen instructions. Note that there are several programs that will download to your Palm device, so you will be asked to select your username several times.
- 5) Shut down your desktop synchronization software. Click on the HotSync icon in the lower right corner of your screen and then select **Exit** from the menu that appears. You may then see a pop-up screen that asks if you really want to shut down HotSync. We strongly suggest that you click the box labeled "Don't show me this screen again", and then click the **Yes** button to shut down HotSync. The reason for doing this is that the HotSync shutdown screen can become hidden behind the **Leader's eBook** installation screens. This can incorrectly give the impression that the **Leader's eBook** installation has frozen or is hung up, when in fact HotSync is simply waiting for a user response. By clicking "Don't show me this screen again" you avoid this problem.

C. HotSync **Leader's eBook**

- 1) From the **Leader's eBook** main menu on your desktop computer, click on the **Sync with PDA** button on the main menu, then click on **Synchronize with Palm OS Device**. In the Synchronize with Palm screen, click on **Synchronize**.
- 2) Put your Palm device in its cradle
- 3) Push the hot-sync button on the Palm device cradle
- 4) Hot-sync will proceed in the usual way
- 5) Update information will appear on the Palm Sync screen

**Troubleshooting**

If you have never HotSynced your Palm device to the current desktop machine and try to download Leader's eBook to your Palm device, you will not be able to find and select your username. If you select any username for the 4 steps, you can then enter a new username at the end of the dialog -- you are now registered with the computer. HOWEVER, you will have to rerun the download procedure using your correct username in order to get Leader's eBook.

## Install to Pocket PC Device

Ensure that your Pocket PC PDA meets the minimum system requirements

- a) MS ActiveSync 3.5 or later.
- b) 6 MB of free memory.
- c) Universal sync cradle.

There are 3 main steps to install the **Leader's eBook** to your Pocket PC device:

- A. Setup desktop and Pocket PC device to ActiveSync
- B. Download **Leader's eBook** software to your Pocket PC PDA
- C. Synchronize **Leader's eBook**

A. Setup desktop and PDA to synchronize. If you have not already done so--

- 1) Install the Pocket PC device desktop software on your computer (This comes as part of your Pocket PC install disk)
- 2) Verify that your PDA successfully synchronizes with your desktop machine, and that the time/date on the PC and PDA are the same.

To install **Leader's eBook** onto the PDA of a user who has never synched to your desktop:

- (a) Open ActiveSync and follow the on-screen instructions
- (b) Select, "Yes, I want to synchronize only with this computer."
- (c) Connect the PDA to your desktop computer.
- (d) The *New Partnership* wizard will start automatically.
- 3) Ensure that you have selected "Pocket Access" to be synched.
  - (a) Open MS ActiveSync and select Options
  - (b) Under Sync Options/Mobile Device select Pocket Access
- 4) If you can sync your PDA with your desktop machine, continue...

B. Download Leader's eBook software to PDA

- 1) Perform a sync between your PC and Pocket PC device immediately prior to installing the **Leader's eBook** on your PDA
- 2) Open the **Leader eBook** program on your PC. From the main menu click on **Install to PDA**, then click on **Install to Pocket PC Device**
- 3) Follow the on-screen instructions.  
**If you have previously installed the Leader eBook** or Satellite Forms, you may be asked to uninstall previous versions. Answer **OK/Yes** to uninstall screens and to shared file deletion screens such as:

"Shared File Detected. The file C:\Program Files\Satellite Forms Runtime for Pocket PC \Pocket PD\arm\Sddi\_ADOCE.dll may no longer be needed by any application. You can delete this file, but doing so may prevent other applications from running correctly. Select Yes to delete the file" **Click "Yes"**

- 4) Check your PDA when you see the screen, "Application Download Complete. Please check your mobile device to see if additional steps are necessary."

On your PDA, you will see "Confirm File Replace. The file \\Windows\adosync.dll, is hidden, read-only, or a system file. Would you like to replace the existing file?" **Click "Yes to All" on PDA.** Then **click OK on your PC.**

**Troubleshooting**

**Opening the Personnel Module on the Pocket PC device.**

- Because of data filtering on the Pocket PC PDA, the Personnel module will take several seconds to open.

**Previous Relationship.** Click "yes" or "ok" to the following question if you have previously installed the **Leader's eBook** on your PDA, and are syncing to a new computer:

- "You have already set up a sync relationship with a database named \_\_\_\_\_ (there are a number databases). Do you want to replace that relationship with this new relationship?"

## Upgrading from Previous Versions

### Upgrading from a previous version of the Leader's eBook (including Platoon Warrior)

1. Synchronize your PC with each PDA using **Platoon Warrior** or **Leader's eBook 2.02/2.11**.
2. Before installing the **Leader's eBook ver. 3**, backup your Warrior Solution files on your PC.
3. Delete **Platoon Warrior/Leader's eBook 2.02/2.11** from your PDAs. **DO NOT delete from your PC!**
  - a. **Platoon Warrior** PDA files to be deleted: PW Personnel; SF-SE SysHeap; SFBeamReceiver; SFE\_SFBeamerPro; SFT-SE Acronyms; SFT-SESYNCP; Warrior.
  - b. **Leader's eBook 2.02/2.11** PDA files to be deleted: Army eBook; Guide; Personnel; Sat.Forms EE RDK 4.1; SFBeamReceiver; SFE\_SFBeamPro.
4. Install **Leader's eBook ver. 3** onto your PC (see Install to PC instructions).
5. Install **Leader's eBook ver. 3** onto your PDA (see Install to PDA instructions).
6. Synchronize **the Leader's eBook ver. 3** between your PC and PDA.
7. Open **Leader's eBook ver. 3** on your PDA and ensure any soldiers you had on the PC have been transferred to the PDA.
8. Left click on your PCs **Start** button. Move your cursor to open **Programs**, then to highlight the **Leader's eBook ver. 3** and click on Upgrade.
9. Follow the on-screen instructions.
10. Open **Leader's eBook ver. 3** and confirm that all files from your previous version have been transferred to **Leader's eBook ver. 3**.
11. Conduct a Sync operation on **Leader's eBook ver. 3**.
12. Confirm that all files have migrated to the PDA.
13. Uninstall **Platoon Warrior/Leader's eBook 2.02/2.11** on your PC by left clicking on the PC's **Start** button and using the **Uninstall** option under **Platoon Warrior/Leader's eBook 2.02/2.11**.
14. To remove all old files from your PC (not required), right click on **Start** button, click on **Explore**. Under your main drive (usually C or D) find the Warrior Solutions directory and delete the **Platoon Warrior** or **Leader's eBook 2.02/2.11** folder.

## Uninstalling the *Leader's eBook*

### Uninstall Procedures for the PC

To uninstall the **Leader's eBook** from your PC left click on the PC's **Start** button, go to **Programs** and select **Leader's eBook**. Click on **Uninstall** and follow the onscreen instructions. After the uninstall has been completed right click on your PC's **Start** button and select **Explore**. Find the **Program Files** on your main computer drive and delete all Warrior Solutions files. This will complete the uninstall process on the PC.

### Uninstall Procedures for the PDA

To remove the **Leader's eBook** from your PDA follow your PDA's instructions for removing third party software.

Moving Data  
**Backup/Restore, Import/Export, and DB Import**

The **Leader's eBook** provides three ways to move data in and out of your database:

**Backup/Restore.** *Backup* copies all data to an external file as security against a catastrophic disk crash or other emergency that could cause the loss of **eBook** data. *Restore* returns back-up data to the **eBook**. CAUTION: When you restore backed-up data, all data currently on your PC is lost! Use Export/Import if you wish to transfer data between computers without losing data.

**Export/Import.** *Export* copies selected data from the **eBook** to selected files. *Import* moves this data back into the **eBook** without deleting existing data. Imported data is synchronized with existing data on the PC in the same way that PDA data is synchronized. Use *Export/Import* when you want to move data between PC's that are both running the **Leader's eBook**.

**Import from Other Databases.** If you have an existing Excel spreadsheet, Access database, or other ODBC-compliant database, you can move information from these external data sources into the **eBook**.

## Backup and Restore Database

The **Backup/Restore** function is used back up the **Leader's eBook** in case of a disk crash or other emergency that could cause the loss of data. You can back up the **eBook** a 3.5 inch floppy disk, a Zip disk, a writable CD, over a network, or with any other mechanism used to transfer files on your PC. (Due to the size of the files within **Leader's eBook**, you will have to compress the files using WinZip or a similar program if you export to a 3.5 inch floppy.)

To back up the **eBook**, click the **Backup** button. Browse the Backup/Restore Data Path to select the drive and directory where you wish to record data. Click **Next** and backup file *eData.mde* will be copied to the drive and directory you selected. We recommend that you backup your program on a regular basis.

To restore data, click on the **Restore** button. Browse the Backup/Restore Data Path to select drive and directory that contains the backup file *eData.mde*. **CAUTION:** When you restore backed-up data, all data currently on your PC is lost! Use Export/Import if you wish to transfer data between computers without losing data.

## Importing and Exporting Data

The **Export/Import** function is used when you want to transfer information about your soldiers, or a specific unit of soldiers, to a file on your PC, to another PC, or to receive data from another PC. You can transfer files on a 3.5 inch floppy disk, a Zip disk, a writable CD, over a network, or with any other mechanism used to transfer files on your PC. (Due to the size of the files within **Leader's eBook**, you will have to compress the files using WinZip or a similar program if you export to a 3.5 inch floppy.) To export, select the records you wish to transfer by using the **Select Soldier From** fields on the **Main Menu**. Next click the **Export/Import** button.

To export data, click the **Export** button. Browse the Import/Export Data Path to select the drive and directory where you wish to record data. Click **Next** and the files will be copied to the drive and directory you selected.

To import data, click on the **Import** button. Browse the Import/Export Data Path to select drive and directory that contains exported files. Exported or imported data is synchronized with your PC data the same way as data synched from your PDA.

## Import Data from Other Databases

With **Leader's eBook Version 3**, you can import existing data from Microsoft Excel files, Microsoft Access databases, and from other ODBC-compliant databases.

### Cut and Paste Import

The simplest way to import data is to open your existing data source and then cut and paste data into the **Leader's eBook**:

1. Click the *Export/Import* button on the main page of the **Leader's eBook** which opens the **Import/Export Data** page.
2. Click the *Import From Other Databases* to open the **elmport** database that is linked to eBook tables.
3. On the **Cut and Paste into eBook** page, click the *Soldier* button to start
4. Open your existing data source (e.g., MS Excel spreadsheet or MS Access database)
5. One by one, copy columns of your existing data (e.g., Last Name, Rank, Hat Size, etc.) and then paste them into the appropriate columns of the *Soldier* table.
6. **NOTE:** You must include a Social Security Number (SSN) for every soldier you enter into the **Leader's eBook**. The **eBook** uses soldier SSN as its primary key to associate data with soldiers. If you do not know the SSN of a soldier, use a dummy 9-digit number as a temporary SSN. You can later change the number to the correct SSN from within the main **Leader's eBook** PC program.
7. After you have finished entering data into the **Soldier** table, click on other buttons on the **Cut and Paste into eBook** form to enter soldier data such as **Medical, Uniform, APFT**, etc.
6. When you are finished entering, click the *Quit* button to return to the main **Leader's eBook** and its **Export and Import** form and then click the *Done* button on that page. Clicking done will run queries that load your imported data into the main **Leader's eBook** tables.
7. Navigate to the **Personnel** pages to review the data you imported into the **Leader's eBook**.
8. Note that you can import data over multiple sessions; you can import some data in one session, and additional information in subsequent sessions.

### Advanced Import

For advanced users, data can be imported into the **Leader's eBook** by writing SQL queries to capture data from other ODBC-compliant databases, from Microsoft Excel spreadsheets, and from other Microsoft Access databases. *Note:* You must have an installed version of MS Access 2000 (or later) in order to undertake advanced import. A tutorial on writing SQL queries and running them within Access is well beyond the scope of this Help file. What follows is a high-level overview of how SQL queries can be used to import data into the **Leader's eBook**. Interested users wishing to learn more are referred to popular books about Microsoft Access:

Online Training Solutions, Inc., *Microsoft Access Step by Step*  
Feddema, *Microsoft Access Inside Out*  
Kaufeld, *Microsoft Access for Dummies*  
Whitehorn and Marklyn, *Accessible Access*

To proceed, find the Access database window by minimizing or closing the **Cut and Paste** page. From the Access database window, open the *Tables* page, click *Create a New Table*, and select *Link Table*. Select the tables from your external database that you wish to link to **eBook** tables. Now open the *Queries* page in the Access database window. Create new update and append queries that transfer data from your external data sources into **eBook** tables. Run the queries to transfer the data and verify that desired data transferred successfully into **eBook** tables. Note that the data is transferred into so-called "intermediate

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tables" within the **Leader's eBook**. These are the same tables used to hold PDA data during PC/PDA synchronization. To complete the import process, close the **elmport** database and return to the main **Leader's eBook** and its **Export and Import** form. Finish by clicking the *Done* button on that page, which will run queries that load your imported data into the main **Leader's eBook** tables.

## Using the Leader's Personnel Module on the PC

**Select Soldier From - The Select Soldier From** button allows the user to restrict the export or import of data to a specific unit from squad to company level. It is also useful in generating reports by allowing the user to select the unit and even rank they want to see in the report. To select the unit or rank click the appropriate box and use the pull-down located on the right side of each box to select the appropriate input.

**Entering Data** - To enter or edit personnel data, click on the large **Personnel** icon on the **Main Menu**. This will take you to the **Warrior Personnel** screen. A SSN must be entered for every individual. Pull-downs are used wherever appropriate. Simply click on the pull-down and select the desired input. If you do not find the term you want, you can type it in the text box and you will be asked if you would like to add it to the pull-down. You can also modify the pull-downs in the Lists folder. Dates must be entered as **MM/DD/YYYY**.

**CAUTION:** Do not make changes to the same individual on the PC and PDA and then synchronize. If you do, all data on the individual entered on the PDA will be lost. A solution: synchronize frequently!

**Miscellaneous Data** - These fields allow you to keep information that is not part of the program, but is important to you. Highlight the **<Label>** you want to name and then type in the title. Now move the cursor to the adjacent box and input the data you want to track. You only have to create a label once as that label will be automatically placed in the same position for each of your soldier's records. Labels can only be changed on the PC.

**Custom Tables** – The **Custom Tables** allow the user to also keep data that is unique to your unit. To setup your **Custom Tables** click on the appropriate **Custom Table** tab and then click on **Setup**. Name the labels as desired and click **Apply**. The tables are now set for you to use.

**Soldier's Picture** - You can paste a Bitmap (bmp) image of a soldier in the picture square on your PC. The picture should have a width to height ration of 1 to 1 – it will stretch or contract to fill the allowed space

**Roll Call** – Use the **Roll Call** button on the **Main Menu** to generate your unit's Morning Report. To open the **Roll Call**, click on the button once. Using the pull-downs under **Status** for each individual, select the appropriate status. Click **Done**, and you will return to the Main Menu where you can generate the **Morning Report** through the **Reports** button.

## Leadership

**Leadership** – Under this button you will find **Acronyms** and **Leadership**. Leadership includes the Army's Core Values, the NCO Creed and the SGT Morales Story. The user can add additional text documents to **Leadership** by clicking on the **New** button and pasting text into the new entry. Definitions can be added to **Acronyms** by typing them in at the bottom of the list of acronyms.

## Synch to PDA

Before you can synch your PDA and PC you must first install the **Leader's eBook** on your PDA. To synchronize the **Leader's eBook** on your PDA with the **Leader's eBook** on your PC, close the **Leader's eBook** program on the PDA, then do the following:

- 1) In the **Leader's eBook** running on your PC, click the **Sync to PDA** button located in the main **Leader's eBook** menu screen.
- 2) This will bring up the **Sync with PDA** screen. Then select **Synchronize to Palm OS Device** or **Synchronize to Pocket PC Device**. You can select to **Upload** data from your PDA, **Download** data from your PC, or **Synchronize** each with the other.

1. **SYNCHRONIZE DATA** -- in most cases, this will be the option you will want to use because it updates both your PC and PDA with the most current information from both. Data is first uploaded to the PC from the PDA, processed on the PC, then downloaded back onto the PDA. Here are the details:

NEW SOLDIER ON PC. When a new soldier is created and entered into the PC, it will automatically be downloaded to your PDA.

NEW SOLDIER ON PDA. When a new soldier is created and entered into the PDA, it will automatically upload to your PC. The only exception to this is if the PC sees that the "new" PDA soldier is in the PC Archives. This signals the PC that the "new" PDA soldier has been removed from the active list and should NOT be uploaded to the PC. When data is subsequently downloaded back onto the PDA, the "new" soldier disappears from the PDA, but remains in the PC archive.

CHANGES ON PC. When changes are made to a soldier on the PC, but not on the PDA, the changes are downloaded to the PDA.

CHANGES ON PDA. When changes are made to a soldier on the PDA, but not on the PC, the changes are uploaded to the PC.

CHANGES ON BOTH PDA AND PC. When changes are made to a soldier on BOTH the PC and PDA, the changes on the PC will overwrite changes on the PDA. This is because the PC has no means to know which changes are more important. Since most users will do most of their data entry on a PC, it makes sense to have the PC data retained. Note that the changed PDA data for the soldier will be lost. The way to prevent this sort of problem is to frequently sync your PC to your PDA so that data changes don't accumulate, and to sync after making changes on the PDA and before you make changes on your PC.

2. **UPLOAD DATA** -- use **UPLOAD** in cases where you want to upload PDA data to a PC, but don't want PC data downloaded to the PDA for some reason. Uploaded data is synchronized with data on the PC as described above.

3. **DOWNLOAD DATA** -- use **DOWNLOAD** when you want to download PC data to the PDA, but don't want PDA data brought up to the PC. **NOTE!** All data on the PDA will be lost. If you want to retain PDA data, use **SYNCHRONIZE**.

### **IMPORTANT NOTES:**

- 1) Be careful not to enter or change data on both your PC and on your PDA for the same soldier between synchronization sessions! If information for the same soldier is changed on PC and PDA, then the changes made on the PDA will be lost during the next

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synchronization operation (the desktop PC will overwrite data on the PDA). The best solution for this potential problem is to frequently synchronize your PDA and PC, and not to let changes accumulate over extended periods. Changing data for one soldier on your PC and another soldier on your PDA does not create a problem – both will synchronize properly.

- 2) The first time you synchronize your PDA to a PC, the PC will overwrite the PDA.
- 3) Ensure that the time set on your PC closely matches that on your PDA, if they do not match the devices will not properly synchronize. There are several freeware programs available that will ensure your times match.
- 4) Verify that your synchronization program is running (for HotSync®, look for its icon in the lower right of your screen) – if not, start it up. Connect your PDA to your PC (e.g., put it in its cradle). Click on the sync option you desire, **Upload**, **Download**, or **Synchronize**, and start synchronization. As the synchronization process proceeds, update information will appear in the **Sync Progress** window.
- 5) Pocket PC – After you place your PDA in its cradle, be sure to allow ActiveSync to complete syncing before you click on the **Leader eBook** sync, download, or upload options. You will then run ActiveSync again.
- 6) Palm OS – If synchronization seems to be stalled, minimize all open screens and check to see if the following message is open: 'Unable to writeread into SFTable. Source: MS JET Database Engine.' Click **“OK”** to proceed.
- 7) Filtering – One possible source of confusion is soldier filtering on the PC. When you select to view (filter) soldiers by Company, Platoon, Squad, or Rank on the PC, only those soldiers that satisfy the filter criteria will be downloaded. For example, if you have specified to view soldiers in Company A, only soldiers in Company A will be downloaded to the PDA. However, ALL soldiers on the PDA will be uploaded, whether in Company A or not. Normally this will not create a problem since the PC will have data from many units, but the PDA will only have data from a single smaller unit (e.g., a platoon).

## Creating and Writing Reports

**Reports** - The **Leader's eBook** includes over 30 pre-formatted reports and a report writer. To view the pre-formatted reports, a printer must be installed on your PC. To create custom reports, MS Access must be installed on your computer. To generate a pre-formatted report, click on the **Reports** button and select the appropriate unit (company, platoon and squad) or individual you wish to include through **Select Soldier From**. Next double click on the desired report.

**Custom Reports** - To create a custom report, click on **Create**, next select the area you want to create a report on, e.g. APFT, Military, etc., then follow the on-screen instructions to format the report. Click **Finish** and you will be able to see the report. If you want to refine the look of the report click on , which will bring you to the **Design View** screen allowing you to easily change the format of the report to meet your precise requirements. When you are done with your reports, click on the **Done** button. You can export any report to MS Word by clicking on the **Word** symbol in the **Tool Bar**.

## Archiving

**Remove** – To remove a record from the **Leader's eBook** select the individual using **Select Soldier**. Next, click on the **Remove** button and follow the on-screen instructions. The soldier will be added to the **Archive** file.

**Archives** – Archived soldiers are those that have been removed from the active soldier database, but have not yet been completely deleted from the **Leader's eBook**. The purpose of the soldier archives is to provide a buffer between active soldiers and complete deletion so that soldier data is not lost by an accidental deletion. From the **Archive** you can reinstate an individual by selecting the soldier, and then clicking on the **Restore** button. To delete a record from the **Archive**, all PDAs associated with the PC must be synched with the PC after the individual is moved to the **Archive** and before deletion. Otherwise, the record will be reinstalled onto the PC by the PDA's files. Once deleted from your **Archive**, the data will be *permanently* deleted from your computer.

## Personnel on the PDA

To use the **Personnel** component, tap on **Personnel**. The screen on a Pocket PC PDA will go blank for up to a minute as it loads the program. Then the **Leader's Personnel** screen will appear. You can add soldiers on your PDA or on your PC. To view a soldier's data, tap on the soldier's name. To enter a new soldier on your PDA tap on **Add Soldier** and then enter the information. Individuals can only be deleted through the PC.

**Soldier Data** - The Soldier Data screen contains all the information fields found on the PC. To go to a particular screen, tap once on the appropriate button. Then tap on the category you wish to enter information in and begin. Pull-downs are used wherever possible. Text can be entered using the PDA's block recognizer, keyboard, letter recognizer or transcriber. To move from one page to another use the << or - buttons located at the bottom right corner of the screen. To move from one category to another, use the **Soldier** menus located at the bottom of the PDA screen for Pocket PC devices and at the top of the screen under the screen title for Palm OS devices.

**Morning Report** - To begin your Morning Report tap on **Morning Report**, then tap on the **Reset** button. Now click on **Roll Call** and for each individual in your command, tap on their status. Use the **Next** and **Previous** buttons to move from person to person. Once you've completed the **Roll Call**, return to the **Morning Report** screen to view a Summary of your **Morning Report**.

## The Leader's Guide on the PDA

**Leader's Guide** is adapted from the public domain Combat Leaders' Guide (CLG) developed by the Infantry Resources Research of the Army Research Institute. Information regarding the CLG can be obtained from the SACG at Fort Benning, DSN 835-5741. The contributions of the CLG to the Warrior Solutions Leader's Guide software are gratefully acknowledged.

### Leader's Guide Main Menu

**Leader's Guide** runs on your PDA only, not on your PC. The navigation buttons on the opening screen of the **Leader's Guide** will take you to over 100 different pages filled with relevant reference information. **The Leader's Guide** includes the **Leadership** module, rules of combat, logistics, communications, reports, offensive and defensive combat, as well as much more. It is an excellent resource for hip pocket training as well as reminder of the many tasks a leader must accomplish in the field.

1. Open the Leader's eBook on your PDA
2. Tap on **Guide**.
3. Tap once on the category you wish to view or use the **Index** to find an alphabetical listing of information.
4. The << or - buttons in the lower right hand corner of the screen will move you between pages in each category.

## Leader's Tools on the PDA

**Tools** - Various tools and calculators commonly needed by soldiers, including:

- APFT calculator
- % Fat Calculator
- US-Metric Conversion Calculator
- Risk Matrix Calculator
- Range Card
- Sector Sketch
- Azimuth-to-Magnetic Calculator
- WORM Calculator
- Acronyms

To open a tool, tap on the appropriate button.

## Beam & Receive Data on the PDA

Using the infrared port, you can transfer data from one PDA to another without using a computer. In order to transfer soldier data, both the sending and receiving PDAs must have the **Leader's eBook** loaded.

### CAUTION!

Beamed data will overwrite existing data on the receiving PDA! For example, if you receive new data for a soldier named Smith, you will lose information for soldier Smith currently loaded on your PDA. If you have information on both PDAs that you want to keep, synchronize both PDA's to the same PC.

### Beaming with Palm OS

#### To Send:

1. If sending information for only one soldier, select that soldier.
2. Return to the Personnel menu and tap **Beam**.
3. Select the components you wish to send:
  - **Soldier Data** includes Military, Roster, Medical, Uniform, Miscellaneous, and basic education data.
  - **Dependents** includes Personal, Family, and Dependents data.
  - **Education** includes Certificates, Languages, Military School, and Other School data.
  - **Awards** includes Recommended Awards and Received Awards.
  - **Qualifications** includes Weapon Qualifications and Crew Qualifications.
  - **Licenses** includes License data.
  - The remaining options directly correspond with the main data categories.
4. If you wish to send all the data on a particular soldier select **All Data**.
5. Align the infrared ports on both Palm OS devices.
6. To send all of the soldiers on the Palm OS device, select **Beam All Soldiers**.
7. To send information for the one soldier, select **Beam ONE Soldier**.

#### To Receive:

1. Align the infrared ports on both Palm OS devices, and remain in the Personnel menu screen.
2. As the other person beams the data, a screen will pop up asking if you wish to receive the data. Tap **Yes**.
3. When the data has been beamed, tap **Receive Data** and follow the instructions.  
*Note:* If you do not want to have to reply to multiple queries to receive beamed data, tap **Receive Data** and then **Turn On/Off eBook Receive Queries**.

### Beaming with Pocket PC

With the Pocket PC, you can send categories of data for all soldiers, such as all APFT data, or transfer all data on all soldiers.

#### To send:

1. Exit **Leader's eBook**.
2. In the **Start Menu**, tap on **Programs**.
3. Tap on **File Explorer**.
4. In the pull down file, select **My Device**.
5. Tap on **Program Files**.

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6. Tap on **WSI eBook**.
7. All of the files ending in P are information files.
8. Select and hold the appropriate file (ex. CTTP or APFTP) until a menu appears. Select **Beam File**.
9. Align the infrared ports at the top of the Pocket PC with the receiving Pocket PC.

### To Receive:

1. Exit **Leader's eBook**.
2. Align the infrared ports at the top of the Pocket PC with the sending Pocket PC.
3. When asked whether you wish to receive the data, tap **Yes**.
4. Once the data has been beamed, go into the **Start Menu** and select **Programs**.
5. In the pull down file, select **My Device**.
6. Tap on **My Documents**. The beamed data files will be saved here.
7. Select the appropriate file and hold it down.
8. Tap on **Cut**.
9. In the pull down file, select **My Device**.
10. Tap on **Program Files**.
11. Tap on **WSI eBook**.
12. Select **Edit** in the lower left corner and tap on **Paste**.
13. A screen will pop up asking if you wish to overwrite the previous data. Select **Yes**.
14. Return to **Leader's eBook** to view the beamed information.

## About Warrior Solutions®

Warrior Solutions, Inc., is located in Boulder, Colorado, and is dedicated to providing cutting-edge mobile software tools for small unit leaders in the U.S. military. Our tools simplify and streamline training and data collection procedures, thereby freeing military personnel to devote valuable time to mission critical tasks. The company was founded by retired U.S. Army personnel, including an Infantry Sergeant Major, a Cavalry Captain, and an Armor Lieutenant Colonel. Our goal is to help military leaders be more effective.

Warrior Solutions software is designed by soldiers for soldiers. Our products provide small unit leaders in the U.S. military with easy-to-use mobile solutions that reduce time spent on administrative tasks, resulting in more time for mission-critical duties. Warrior Solutions software tools streamline standard military data collection and training activities. These tools enable the simple, rapid, and accurate retrieval and exchange of data by replacing paper-based checklists, forms, and inventories. The digitization of U.S. military forces is accelerating – Warrior Solutions is here to provide effective mobile software solutions for tomorrow's soldier-leaders.

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