

TracerPlus

for Windows Mobile and Pocket PC

TracerPlus Version 1.0
Portable Technology Solutions, LLC

Telephone: 1-877-640-4152
Fax: 1-501-421-5085

<http://www.ptshome.com>
support@ptshome.com



This document and the software described by this document are copyright 2001-04 by Portable Technology Solutions LLC. All rights reserved. Use of the software described herein may only be done in accordance with the License Agreement provided with the software. This document may not be reproduced in full or partial form except for the purpose of using the software described herein in accordance with the License Agreement provided with the software. Information in this document is subject to change without notice.

Windows is the registered trademark of Microsoft Corporation. All other trademarks are the property of their respective owners

PORTABLE TECHNOLOGY SOLUTIONS LLC WILL NOT BE LIABLE FOR (A) ANY BUG, ERROR, OMISSION, DEFECT, DEFICIENCY, OR NONCONFORMITY IN TRACER OR THIS DOCUMENTATION; (B) IMPLIED MERCHANTABILITY OF FITNESS FOR A PARTICULAR PURPOSE; (C) IMPLIED WARRANTY RELATING TO COURSE OF DEALING, OR USAGE OF TRADE OR ANY OTHER IMPLIED WARRANTY WHATSOEVER; (D) CLAIM OF INFRINGEMENT; (E) CLAIM IN TORT, WHETHER OR NOT ARISING IN WHOLE OR PART FROM PORTABLE TECHNOLOGY SOLUTIONS CORPORATION'S FAULT, NEGLIGENCE, STRICT LIABILITY, OR PRODUCT LIABILITY, OR (F) CLAIM FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, OR CONSEQUENTIAL DAMAGES, OR LOSS OF DATA, REVENUE, LICENSEES GOODWILL, OR USE. IN NO CASE SHALL PORTABLE TECHNOLOGY SOLUTIONS LLC LIABILITY EXCEED THE PRICE THAT LICENSEE PAID FOR TRACERPLUS.

TracerPlus

for Windows Mobile and Pocket PC

Contents

Chapter 1: Introduction	4
1.1 What is TracerPlus?	4
1.2 Free Trial	4
1.3 Learning TracerPlus	4
1.4 Barcoding with TracerPlus	4
1.5 Integrating TracerPlus	5
1.6 PTS Support.....	5
Chapter 2: Installation	6
2.1 System Requirements	6
2.2 Automatic Installation	6
2.3 Installing TracerPlus on Multiple PDAs	6
2.4 Registering TracerPlus.....	6
2.5 Removing TracerPlus Installation	7
Chapter 3: Sessions	8
3.1 Configuring Session Attributes	8
3.2 Session Settings Explained.....	10
3.2.1 General Session Settings	10
3.2.2 Import/Export Settings	11
3.2.3 Data Storage and Transfer Settings	12
3.3 Deploying Configured Sessions to Multiple Users	13
Chapter 4: Field Settings	14
4.1 Configuring Field Settings	14
4.2 Field Settings Explained.....	17
4.2.1 Field Types	17
4.2.2 General Field Settings	19
4.2.3 Validation Field Settings	21
4.2.4 After Scan Field Settings	22
4.2.5 Drop-Down Lists	23
Chapter 5: Managing Data	26
5.1 Entering Data	26
5.2 Editing Data from the Main Screen	26
5.3 Quick Buttons	27
5.4 Finding Data	27
5.5 Managing Data from the PDA to the PC	27
5.5.1 How Data Is Sent to the PC.....	28
5.5.2 Viewing Data Files on the PC	28
5.5.3 Linking TracerPlus Session Data to an MS Access Table	28
5.5.4 Linking TracerPlus Data to an MS Excel Worksheet.....	28
5.6 ActiveSyncing Data from the PC to the PDA	29

5.6.1	Sending Session Data to the PDA.....	29
5.6.2	Creating Session Data Files with Excel.....	30
5.6.3	Sending Drop-Down Lists to the PDA.....	30
Chapter 6: Administration Settings		31
6.1	Setting Passwords.....	31
6.1.2	Enable Protection for	31
6.2	Deploying Configured Sessions to Multiple Users	32
6.2.1	How to Copy One PDA Configuration to Other PDAs	32
6.2.2	File Names Used by TracerPlus	32

Chapter 1: Introduction

1.1 What is TracerPlus?

Create enterprise class, barcode enabled, data collection applications in minutes for most tasks including asset management, inventory control, and many others with TracerPlus. No programming knowledge is needed. Simply create your familiar forms right on your PDA.

TracerPlus incorporates time saving features that are not seen in any other applications. "Data Entry Validation", "Auto Find", and "After Scan Settings" are just a few of the features that will save you time and money. If you or your company has to collect data, TracerPlus is the right choice.

Common TracerPlus Applications

- Inventory Management.
- Asset Management.
- Library Book Tracking.
- Remote Store Management.
- Computer Management.
- Job Material Management.
- Time Tracking.
- Trade Show Visitor Tracking.

1.2 Free Trial

TracerPlus is a shareware application. A shareware application typically means that you can use it on a trial basis for no fee.

The trial download is limited in that only allows 2 sessions can be created and only 5 records will transfer to and from the PC. Once you decide to purchase TracerPlus, simply fill out the PTS Registration Request Page accessible from your PC's Start Menu. A registration code will be sent within 24 hours. Alternatively, you can register from our website at <http://www.ptshome.com>. This registration code will activate your trial version, enabling it for full use; there is no need to reinstall.

1.3 Learning TracerPlus

To discover the full power of TracerPlus, we strongly recommend that you read this manual completely. However, with only a basic understanding of **Chapters 3 and 4**, a user can begin to create basic applications with TracerPlus. If you wish to send data to a PC or retrieve a database from the PC, **Chapter 5** should be read thoroughly. Finally, if a system administrator needs to deploy TracerPlus sessions to a mobile workforce, **Chapter 6** should be read thoroughly. In order to ease the learning process of TracerPlus, a registered user receives free email support for 30 days from the date of purchase. Purchase of extended support agreements is also available, offering both email and phone support.

1.4 Barcoding with TracerPlus

TracerPlus is designed to speed data entry with or without a barcode enabled PDA. Drop down menus, time/date stamps and auto submit features allow users to collect data faster and more accurately. However, to discover the full power of TracerPlus, we recommend using a barcode enabled PDA. A list of the current barcode enabled PDAs supported by TracerPlus are listed below. All of these units are available for purchase at <http://www.ptshome.com>.

Currently Supported Windows Mobile, Pocket PC and Windows CE.Net Bar Code Terminals include:

Symbol PPT 2700 Series
Symbol PPT 2800 Series
Symbol PPT 8800 Series
Symbol PDT 8100 Series
Symbol MC 9000 Series
Intermec 700 Series

1.5 Integrating TracerPlus

TracerPlus data can be ActiveSynced to the PC in one of six popular file formats. Refer to Section 3.2.3 for a more detailed discussion on file transfer formats. This flexibility makes it possible to integrate TracerPlus with most programs and databases. Below is a list of the more popular programs and databases TracerPlus is integrated with.

- Excel
- Microsoft Access
- Microsoft SQL Server
- Oracle
- MySQL
- People Soft
- FileMaker
- FoxPro

1.6 PTS Support

As a registered TracerPlus user, you receive free email support for 30 days from the date of purchase. During this period, we are available to answer TracerPlus questions as well as general barcode questions. Our goal is to provide TracerPlus users the tools to capitalize on the efficiencies of bar code data acquisition. Please visit <http://ptshome.com/support.htm> to learn more. To contact PTS technical support, please email support@ptshome.com.

Extended support contracts, including phone support can be purchased at <http://www.ptshome.com/support.htm>.

PTS also hosts a TracerPlus User Group. The group was created to offer our users a communication channel in which to discuss TracerPlus. You can join the TracerPlus User Group at <http://www.ptshome.com/support.htm>.

Chapter 2: Installation

This chapter details the steps for installing TracerPlus.

2.1 System Requirements

- Windows 98/NT/2000/XP
- ActiveSync version 3.5 or higher
- A PDA or Bar Code enabled terminal running Windows Mobile, Pocket PC, CE.Net or CE version 3.0 or higher.

2.2 Automatic Installation

1. Download **tracerp_ppc.exe** from <http://www.ptshome.com/downloads.shtml> or another authorized reseller.
2. Double click **tracerp_ppc.exe** in the folder to which you saved the download.
3. Follow the standard installation instructions.
4. The TracerPlus application is now ready for use on your portable device or will be available on your next ActiveSync depending on your configuration. The TracerPlus application is located under **Start Menu→Programs** on your PDA. It is additionally available from the Shortcuts Taskbar after running for the first time.

2.3 Installing TracerPlus on Multiple PDAs

Before installing TracerPlus on multiple PDAs, it is recommended that each PDA be Synced at least once with ActiveSync and assigned a PDA user name. With TracerPlus installed on your PC use the PDA Installer to select the PDAs you want to install TracerPlus on. The PDA install tool can be found on your PC, click on Start → Programs → PTS → Tracer Plus, and select the “PDA Installer” icon. Then simply perform an ActiveSync for each PDA and TracerPlus will be installed.



2.4 Registering TracerPlus

TracerPlus is an application that requires registration for full functionality. The trial version of TracerPlus limits the number of records entered on the PDA and transferred to the PC to five, and the number of sessions to two. Once TracerPlus is registered, these trial limitations are lifted.

PTS encourages all users who benefit from TracerPlus to register their copy. To register TracerPlus, we only require your TracerPlus PDA ID, your operating mode (Standard or Pro) and an Email address. We generate a unique registration code for your TracerPlus PDA ID and the version of TracerPlus you select, so it is important that you send the ID exactly as it appears on the TracerPlus splash screen; capitalization and spacing are critical.

How to Register:

1. On your PC, click on Start – Programs – PTS – Tracer Plus, and select the “Registration Info” icon.



2. Locate the PDA IDs you wish to register, and click on the link to purchase the software. If you are an existing user, follow the links for upgrading your license. If you have already purchased TracerPlus through PTS or an authorized reseller please proceed to step 4.
3. Once your purchase is completed and payment is received, you will receive an order confirmation from PTS.
4. Complete, review and submit the Registration Info form on your PC.
Note: Make sure that the correct version of TracerPlus is selected.
5. Once this step is completed, your registration code is e-mailed to the address provided. This process usually takes one hour but we ask that you allow one business day in the event of heavy traffic or any other delay.
6. Once you receive your registration code, follow the instructions below to enter the code into your PDA.

Entering Your Registration Code

1. Start the **TracerPlus** application on the PDA.
2. Click the **Register** button in the TracerPlus Splash Screen.
3. Enter your **Registration Code** at the Code prompt.
4. If the Registration Code is valid, you will receive a **Thank you for Purchasing TracerPlus** message.

2.5 Removing TracerPlus Installation

In the unlikely event that you would like to remove TracerPlus from your PDA, follow these simple instructions.

1. Use the Add/Remove Programs feature in MS Windows via Control panel to Remove PTS TracerPlus from your PC.
2. On your PDA navigate to Start\Settings\System\Remove Programs. Highlight TracerPlus and select **Remove**.

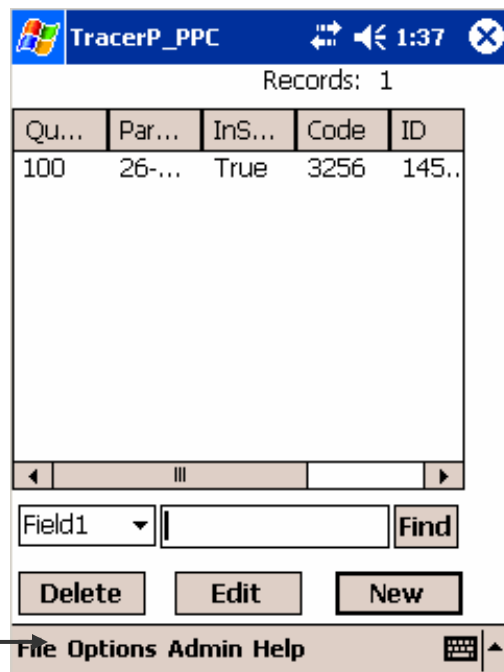
Chapter 3: Sessions

TracerPlus allows users to create up to 32 unique data capture programs. These unique programs are called Sessions. Sessions are easily accessed from the **Main Screen**, where captured data can be viewed and searched. In this section, you will learn how to configure session attributes to meet your data capture needs. **Chapter 4** details how to configure individual fields within a Session.

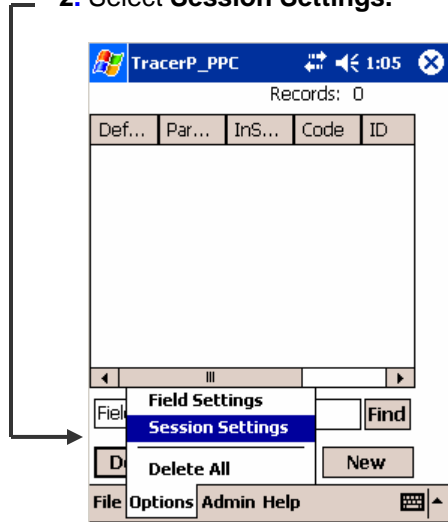
3.1 Configuring Session Attributes

The first step in creating a TracerPlus Session is to assign a name. This name is displayed in the session menu, and is selected by the user when collecting data, editing field settings, or editing session settings. To create a Session name, follow the steps below.

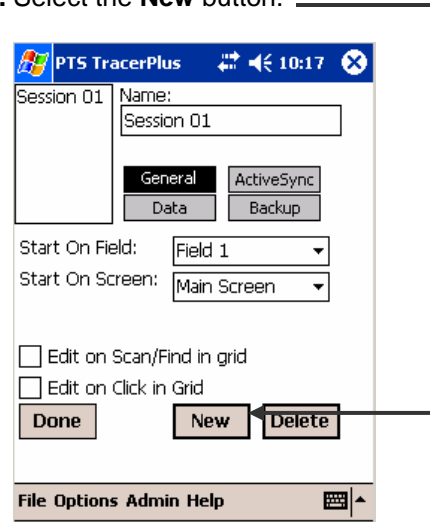
1. From the data view screen select the **Options** menu button.



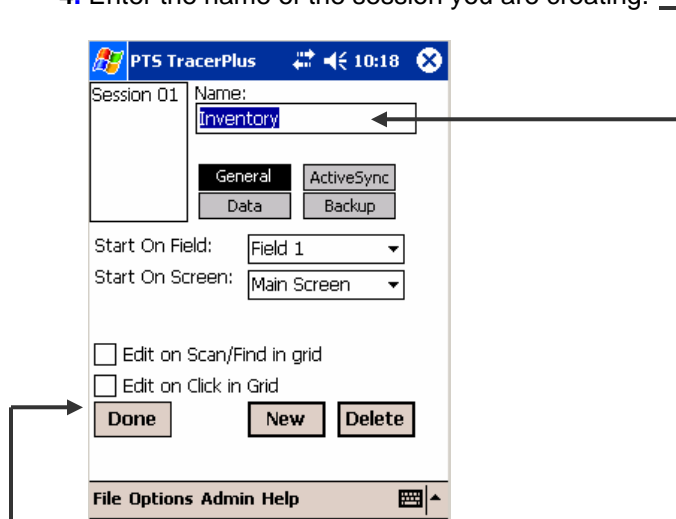
2. Select **Session Settings**.



3. Select the **New** button.



4. Enter the name of the session you are creating.

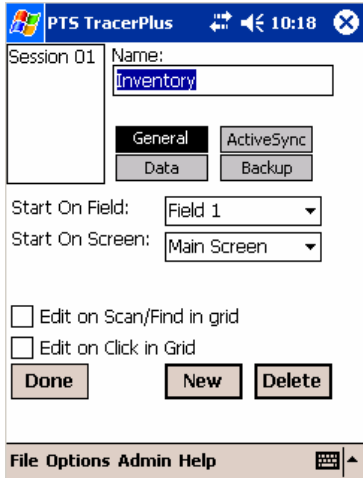


5. Configure your session's **General, ActiveSync, Data and Backup** attributes as described in **Sections 3.2.1-3.2.4**. When you are finished, press **Done**. If you do not need to modify the session, the default settings will be used and you can proceed directly to Field Settings, Chapter 4, if you wish to use default session settings.

3.2 Session Settings Explained

3.2.1 General Session Settings

General Session Settings are used to control the general operating characteristics of the session. These operating characteristics cannot be set at the field level.



Start On Screen

Select the screen the User will enter when they leave the TracerPlus Splash Screen. The user can choose between starting on the Main Screen or the Data Entry screen. Note that this option takes effect only when this session was the last one used – each session has its own settings.

Start On Field

Select the first field the User is focused on when **New** is selected from the data view screen. This setting is commonly selected to control what data must be entered when the program is initially opened.

Example: A session is created to capture package delivery information. Date and Time stamps are captured in fields 1 and 2. The bar-coded Package ID will be entered into is Field 3. In this scenario the Start On is set to Field 3 since Field 1 and 2 are auto entered via automatic date and time stamps.

Edit on scan/Find in grid

Select **Edit on scan/Find in grid** to automatically open records in the data entry screen when a record is located using 'Find' or scanning on the main grid screen. Note that the Find Field affects which field's data is used for searching.

Example: A session is created to perform an inventory audit. The goal of the audit is to quickly find items in the TracerPlus database and compare the database values to the actual inventory levels. To speed this process, the **Edit on scan/Find in grid** setting is enabled. When an item is scanned in the find field and located in the database, the matching record is automatically brought up in the data entry screen for editing.

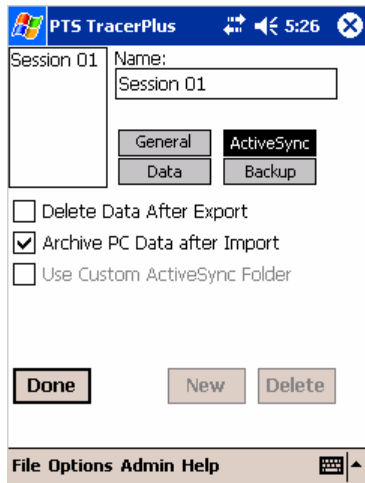
Edit on Click in Grid

A similar option for automatically editing a record is the behavior of editing a record immediately upon clicking it in the grid. Selecting this option is very useful for the user who is performing a lot of edits to existing data.

Note: When this option is selected, it is not possible to delete a single selected record from the grid. The user must turn this option off before being able to delete single records. The Delete All menu choice behavior is not affected.

3.2.2 Import/Export Settings

Import/Export settings are used to control how data is moved from your PDA to PC.



Delete Data After Export

Select **Delete Data After Export** if the data should be removed from the PDA database after a successful Export. Note that if data is not successfully exported, as a safety precaution, it will not be deleted from the PDA Database even when this option is enabled.

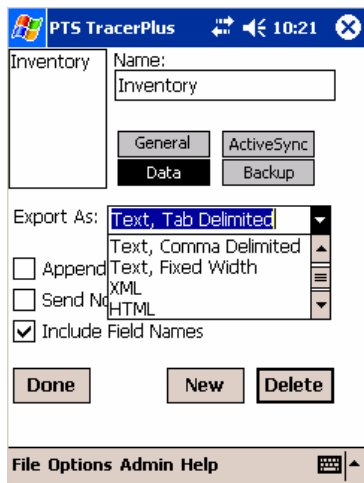
Archive PC Data After Import

Select **Archive PC Data After Import** if you wish to archive any files imported from PDA during an Import. Any data files successfully imported are renamed with a prefix of “old_” after a successful Import if this option is selected. Import files include both list contents as well as any session data needing import to the PDA.

Note: Without this option, your upload files will be uploaded every time you perform a import, which may cause the import process to take longer than necessary.

3.2.3 Data Storage and Transfer Settings

Data settings are used to control the format of the session's data file exported via File->Export.



Export As

This option allows the user to select from one of five possible data formatting types

Text (Tab delimited)

This formatting option embeds a <tab> character between every transferred field. Each record is terminated with a Carriage Return/Line Feed (CRLF)

Text (Comma delimited)

This formatting option wraps each field in quotation marks and separates each field with a comma. Each record is terminated with CRLF.

Text (Fixed Width)

This formatting option transfers all fields using a fixed width. Any space remaining at the end of Field data is padded with spaces. Use of the Max Length field setting is also used to dictate the width of each fixed width field. The maximum length of any given field is 30 chars. Each record is terminated with CRLF.

XML

This formatting option allows data to be transferred in XML format. This is very useful for customers when importing into existing systems.

HTML

This formatting option transfers all data in HTML table formats. This provides a formatted representation of the collected data that can be viewed as a web page.

Text (Comma, No Quote)

This formatting option separates each field with a comma. Each record is terminated with CRLF.

Append to Existing File

By default, TracerPlus appends new data to any existing data file in the FromPDA export folder. When this option is selected, the new data file is appended to the pre-existing file if it exists. If this option is not selected, any previously transferred data is deleted and a new file is created on each Export operation. A new file will be created if it does not exist regardless of this setting, however.

Send Non-Visible Fields

By default, TracerPlus does include non-visible fields in the data file. When this option is selected, non-visible fields will be sent to the export file. Refer to **Chapter 4** on how and when you might use this option.

Include Field Names

By default, TracerPlus does not include field names in the export data file. When this option is enabled, the user configured field names are provided in the generated data file. Depending on the file format, this is represented in different ways. For all of the text data transfers, the Field names are included as a header record, being transferred as the first line of the data file. For the XML and HTML formats, the field names are included in the general formatting of the data file.

3.3 Deploying Configured Sessions to Multiple Users

Please refer to **Chapter 6, Section 6.2** for a detailed look into how to deploy session configuration to your entire workforce.

Chapter 4: Field Settings

After a session is created, fields within that session may also require configuration. Before configuration, all available fields within the session are in a default state. TracerPlus Standard had 10 fields available for configuration and TracerPlus Professional has 30 available fields.

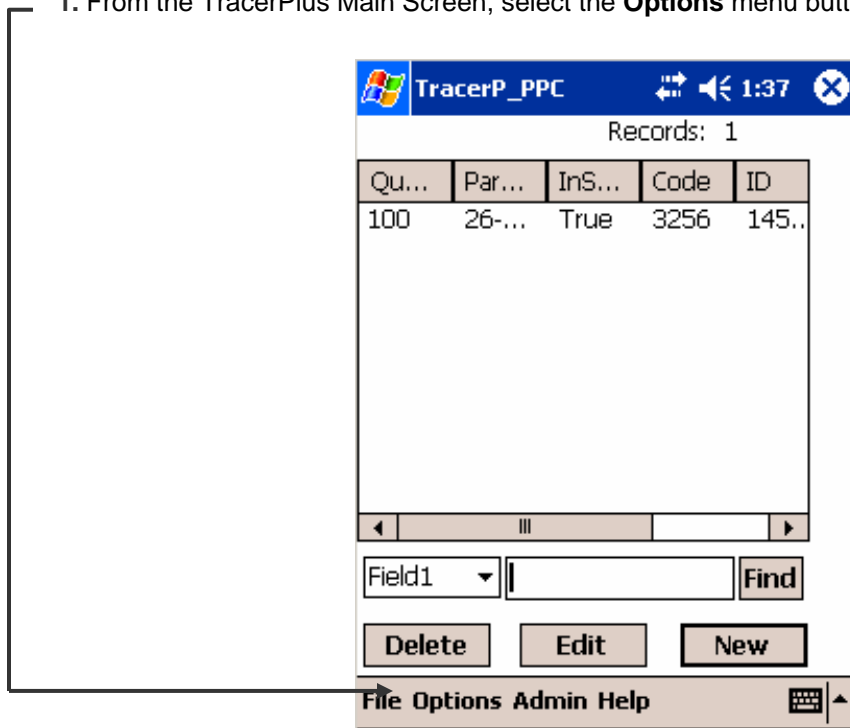
Customizing your session settings and field settings is not required, as the default settings will work perfectly for many users. However, to fully realize the power of TracerPlus, some of these settings may need modification for your specific needs. Proper field configuration may speed up data acquisition and may prevent data input errors, again, depending on your collection requirements.

In this chapter, you will learn how to set up fields for your specific application. **Section 4.2** explains the various TracerPlus field settings in more detail.

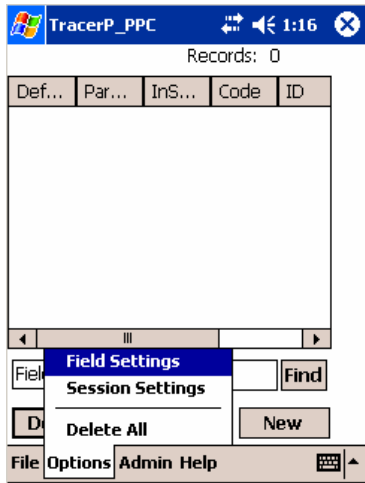
4.1 Configuring Field Settings

Below we go through the steps required to configure field settings.

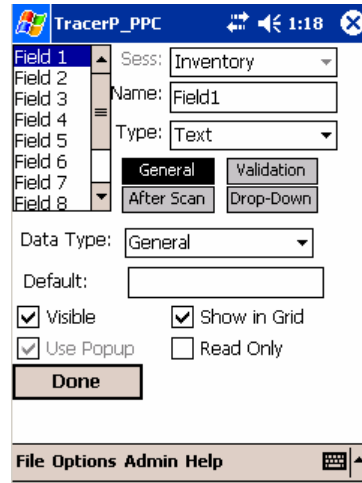
1. From the TracerPlus Main Screen, select the **Options** menu button.



2. Select **Field Settings**.

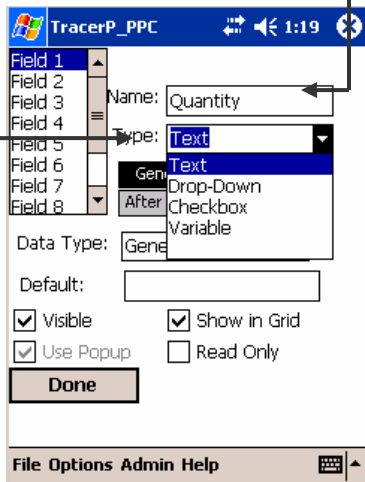


3. Select a TracerPlus session.



4. Select a field to configure.

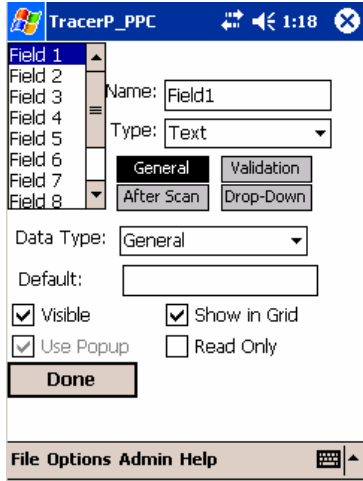
5. Enter the field Name.



6. Select a **Field Type**. Section 4.2.1 discusses these field types in more detail.

Chapter 4: Field Settings

7. Enter **General** field settings. Section 4.2.2 discusses these settings in more detail.



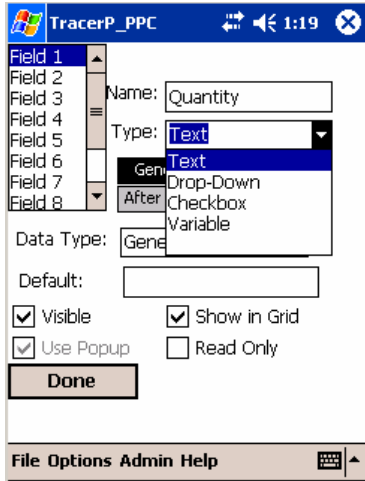
8. Enter additional field settings. Refer to Sections 4.2.3 through 4.2.5 for more detail on the other available field settings options.
9. Repeat steps 4-8 to configure additional fields.

Chapter 4: Field Settings

4.2 Field Settings Explained

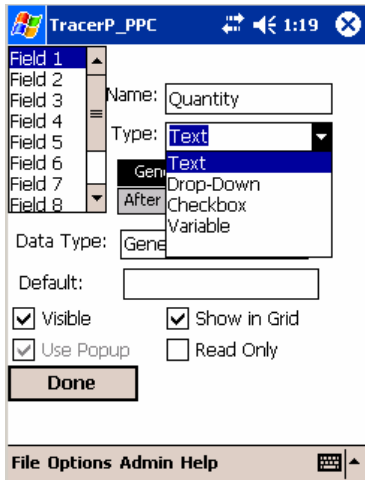
4.2.1 Field Types

The Field Type setting is used to control what type of data is entered for this field. TracerPlus has four available Field Types: **Text**, **Drop-Down**, **Checkbox** and **Variable**.



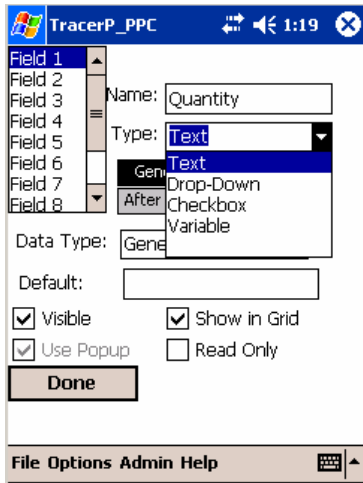
Text

Text fields should be chosen when data is to be entered via a bar code, keyboard, or graffiti. The Text type does not restrict input in any way, and can store up to 30 characters.



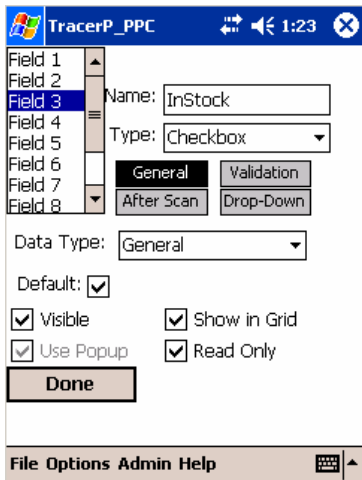
Drop-Down

Drop-Down fields allow the user to select from a pre-defined list of items. Drop-Down fields offer a quick, error free way to enter data from a select list of choices. Section 4.2.5 provides more detailed information regarding drop down lists.



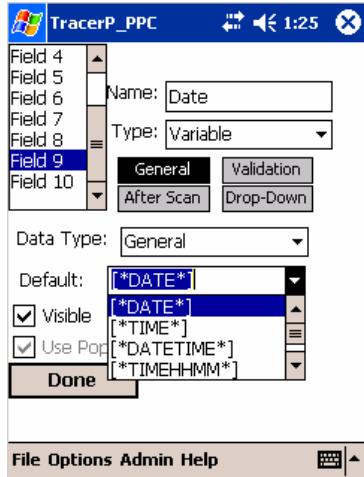
Check Box

Check box fields are used when simple Yes/No, True/False, On/Off selections are made. Check boxes should be used whenever possible to speed data entry, and limit data entry error.



Variable

Variable fields are used to automatically enter values such as Time and Date. To set a Variable field the user selects the value they would like to enter in the field from the drop down menu. The selected setting will then appear in the "Default" field value in the Settings screen. By default, **Variable** field values are populated when the record is first created. To update the variable each time it is submitted, simply enable the **Update Variables** option for that field. Refer to Section 4.2.4 for more information regarding **Update Variables**.



DATE

When **DATE** is selected the current date is automatically entered in the field in the **mm/dd/yyyy** format (i.e. 05/07/2003).

TIME

When **TIME** is selected the current time is automatically entered in the field in **hh:mm:ss** military format (i.e. 19:19:55).

DATETIME

When **DATETIME** is selected, the current date *and* time are automatically entered in the field in the mm/dd/yyyy hh:mm:ss format (i.e. 05/07/2003 13:14:55).

TIMEHHMM

When **TIMEHHMM** is selected the current time is automatically entered in the field in the hhmm format (i.e. 0915). The first two digits represent the hour the next two digits represent the minutes past the hour.

DATE2

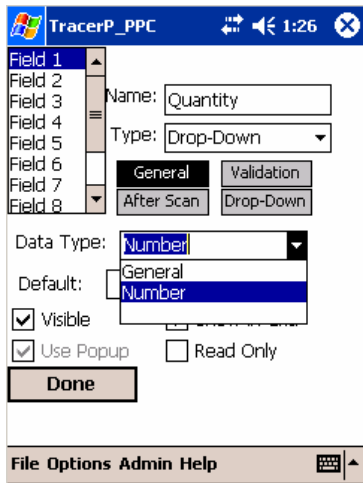
When **DATE2** is selected, the current date is automatically entered in the field in the yyyy-mm-dd format (i.e 2003-05-07)

4.2.2 General Field Settings

General Field Settings allow the user to define the most basic field attributes. These settings allow a TracerPlus user to remove visibility of a field, establish default values, numeric only fields, and read only fields.

Data Type

The **Data Type** represents the format of the expected data for the selected field.



General

General is set to accept all data types in a field, including date time stamps.

Numeric

Numeric is set when the field is only used for numeric data. When a field's Data Type is set to Numeric, it does not accept any Alpha characters.

Date

Date is set when the field is used to enter dates.

Time

Time is set when the field is used to enter times.

Note: Time data is always stored in military format.

Default

The **Default** represents the value that is initially used for the selected field. For example, you may set up one of your fields to represent a quantity. Likewise, you might want to set the **Default** for that field to be 1.

Note 1: If the user clicks the **Clear All** button from the data entry screen, this value is cleared, as well.

Default values can also be entered using **Variable** field settings. Refer to Section 4.2.2 for more information.

Visible

This option is normally selected and allows a field to be viewed or hidden in the data entry screen. A field's visibility should be turned off when it is not being used in a session or if the default contents need to be stored but not seen by the user as in some cases of Date/Time stamping of an individual record.

Show in Grid

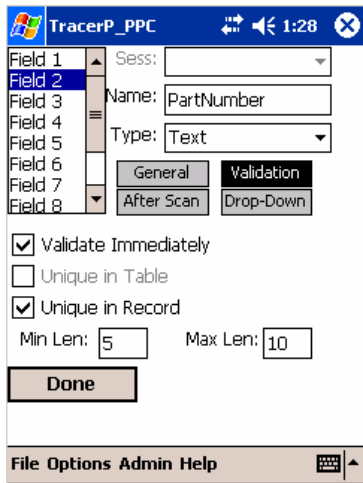
When **Show in Grid** is selected, the field is visible in the Main Screen grid. Fields are displayed in their numeric order in the grid.

Read Only

When the **Read Only** option is selected, the user does not have the ability to enter data in the selected field. This is commonly used in conjunction with default values and **Variable** type fields.

4.2.3 Validation Field Settings

Validation Field Settings allow the user to exhibit controls that check the accuracy of the entered data.



Validate Immediately

This option represents whether or not a field should be validated immediately after it is entered. When **Validate Immediately** is not selected and **Validation** settings do exist, the field data will still be validated when the record is submitted.

Unique in Table

When selected, this option prevents duplicate data values within the current session. If a field is submitted and it violates the **Unique in Table** setting, an audible alarm and error message is displayed.

Unique in Record

When selected, this option prevents duplicate data values within the current record. If a field is submitted and it violates the **Unique in Record** setting, an audible alarm and error message is displayed.

Min Len

This option allows the user to validate an entry based on the minimum number of characters required. If a field is submitted with less than the **“Min Len”** setting, an audible alarm and error message is displayed. Setting a Min Len of 1, for example, prevents the user from leaving that field blank.

Max Len

This option allows the user to validate an entry based on the maximum number of characters allowed. If a field is submitted with more than the **“Max Len”** setting, an audible alarm and error

Chapter 4: Field Settings

message is displayed. Specify a Max Len of zero to disable this rule. Fields in TracerPlus can store up to 30 characters.

4.2.4 After Scan Field Settings

After Scan field settings are designed to increase data entry speed and accuracy. Repetitive data capture scenarios such as inventory audits lend themselves to the efficiencies of these settings. It is recommended that these features be activated whenever possible.

NOTE: The '**After Scan**' rules are triggered by both a completed barcode scan as well as pressing the **Down Arrow** key on your PDA.

The screenshot shows the 'After Scan' configuration window for Field 2. The 'Name' is 'PartNumber' and the 'Type' is 'Text'. The 'Auto Submit' and 'Clear On Submit' options are checked. The 'Go To:' dropdown is set to 'Field 2'. The 'Done' button is visible at the bottom of the dialog.

Auto Submit

This option represents whether or not to automatically submit this record following an '**After Scan**' event for this field. If this option is chosen for the selected field, the system automatically submits the record and sets the focus to the field selected in the **Go To** prompt for the selected field. The form is then ready for a new record.

Clear On Submit

This option is used to tell the system whether to clear the selected field after submitting the current record in the Entry screen. If the current record is submitted as a result of an '**After Scan**' event or by clicking the **Submit** button, all the fields with this option selected are cleared. If the field has a Default Value, that value is used instead of a blank entry. Turning off Clear On Submit is especially useful if several records in a row will share a value for a field – it saves the user the time of re-entering the same data when entering several new records.

Auto Find on Scan

This option allows the user to perform a lookup of entered data for this field. If the item is found, the user is moved to this record and is placed in edit mode for this record.

Update Variables

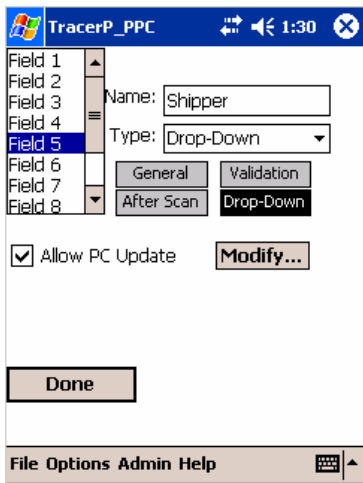
When this option is selected, Variable field data is updated to represent the variable value at the time that the record was **submitted** as opposed to the default operation of using the time that the record was **created**. This is really only relevant for date/time based variable settings and should usually be turned off in any other variable field. This is useful when you want to track the date/time a record was edited, rather than created.

Go To

This option allows the user to control the **'tab order'** for the selected field. After a user performs a successful scan while in the focus of the selected field, the system sets the focus to whichever field is selected as the **Go To** Field. The user typically uses this feature to control the **'flow'** of data entry. Alternatively, the Down Arrow key represents an **'After Scan'** event for those PDAs that are not barcode enabled.

4.2.5 Drop-Down Lists

Drop Downs allow TracerPlus users to create their own **Drop-Down** list menus for specific fields. TracerPlus gives the user the ability to create these lists either directly on the PDA or from a file on the PC via a ActiveSync data transfer.



Allow PC Update

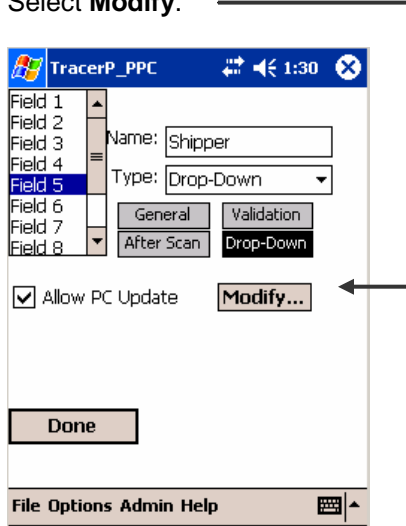
This option allows the user to create drop-down lists on the PC. During ActiveSync these lists are loaded into the field and overwrite any existing drop-down information saved on the PDA. For this reason, we offer the ability to disable the PC Update option. This gives the user the ability to avoid accidentally overwriting any existing list information created on the PDA.

If you wish to allow list contents to be uploaded from the PC for a particular session and list, this option should be checked. If you wish to prohibit the PDA from getting updated list contents from the PC, simply uncheck this option. **Chapter 5** refers to PC Operations in more detail. Please refer to that section for more detail regarding list updates from the PC.

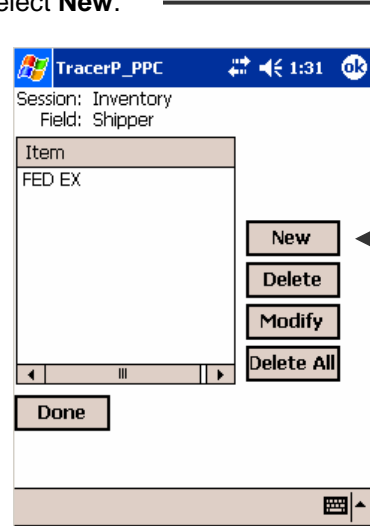
Modify

Select the **Modify** button to directly edit the list contents on the PDA. We discuss the steps in creating drop-down list items in the following section.

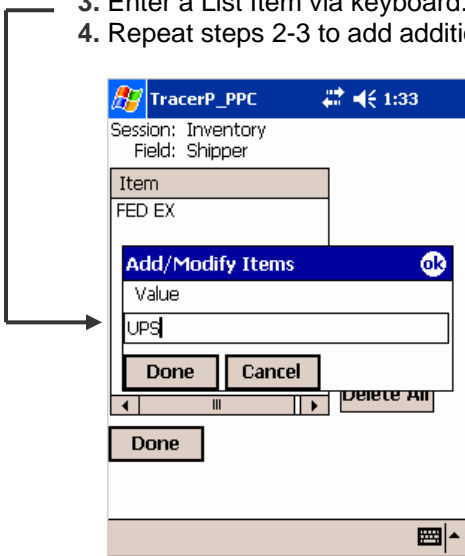
1. Select **Modify**.



2. Select **New**.



3. Enter a List Item via keyboard. Click Done when finished
4. Repeat steps 2-3 to add additional list items.



TracerPlus **List Items** can be edited and deleted in the TracerPlus **Lists** screen. Simply choose the value to be edited and select the appropriate button.

NOTE: List Items may also be deployed to multiple users. In most multi-user cases, the PC update option would be used, but it is also possible to create a list on one PDA and distribute to your entire mobile work force. Refer to Chapter 5 for more information regarding this powerful feature.

Chapter 5: Managing Data

5.1 Entering Data

To enter data in TracerPlus, the user must first select the appropriate session. Once that is selected, clicking the **New** button will start the data entry/collection process.

Entry Screen

The **Entry Screen** is the area where the user does data entry. The fields are presented to the user with the customized fields as they were configured. The user enters data for each field presented. When the data is being scanned, the system controls the flow to the next field based on the Field Settings previously set up. This screen contains three buttons. These are discussed below.

Records: 0

Quantity 100

PartNumber 26-GHJ458

InStock

Code 3256

Shipper UPS

ID 14568

Date 07/19/2004

Time 13:35:46

Done Submit Clear All

File Options Admin Help

Done Button

Click the Done button when you have finished entering data and would like to return to the Main Screen. You will be prompted as to whether you would like to save the last record. Answer appropriately. You will now be returned to the Main Screen.

Submit Button

Clicking the Submit button submits the current record to the database. After clicking this button, the focus is set to the field that was set as the Session Start On field. Refer to Section 3.2.1 for more information on setting a Start On field.

Clear All Button

Clicking the Clear All button clears all data from all fields for this record. Notice that the focus does not change after clicking this button. Also notice that any Default values selected in the Field Settings are not recognized.

5.2 Editing Data from the Main Screen

The **Main Screen** is the area where the user can review, edit and search for records previously entered. The user can delete or edit a record by selecting it and then tapping a function key. For more information on searching for records review **section 5.4**.

Delete

Click the Delete button to delete the selected record.

Edit

Click the Edit button to edit the record in the Data Entry screen.

5.3 Quick Buttons

TracerPlus specializes in streamlining screen interaction. We do this through implementation of several unique features. This allows for very fast and accurate data entry. One of the features to aid in this is using the **Up/Down** keys on your PDA.

The **Up Arrow** key allows the user to move up one field on the **Entry Screen**. Note that this does not follow the 'Go To' field settings. It simply moves up one field on the **Entry screen**

The **Down Arrow** key allows the user to move down one field in the **Entry Screen**. The **Down Arrow** key is actually used to trigger the '**After Scan**' rules and TracerPlus behaves just like it would after receiving a valid barcode scan. If, for example, the **Auto Submit** flag is enabled for the current field, and the user presses the **Down Arrow** key, the current record is submitted and all of the After Scan field settings for the field are respected; including the 'Go To' Field. This is especially useful for the users that do not have a barcode enabled PDA.

5.4 Finding Data

While in the Main Screen, TracerPlus users can search the session database while by using the **Find** feature. Follow the directions below to use the find feature.

1. Select a field to search.
2. Scan or enter data into the Find Field.
3. Click the Find button.

The first screenshot shows the TracerPlus PDA interface with a table of records. The table has columns: Quant..., PartNumber, InStock, and Cq. The first record is: 100, 26-GHJ458, True, 32. Below the table is a list of fields: Field1, Field2, Field3, Field4, Field5, Field6. Field1 is selected. Below the list is a text input field and a Find button. The second screenshot shows the same interface after a search. The table now has three records: 75, 965-AB26, True, 3256; 250, B256-3, True, 3256; 100, 26-GHJ458, True, 3256. The second record is highlighted. The text input field contains 'B256-3' and the Find button is visible.

If you are manually entering data, you must click the **Find** button. If you are scanning data, this is done automatically when you scan a barcode value. Additionally, there is a session setting that enhances the operation of this **Find** feature. Using Session settings, you may set the option to **Edit on Find**. Refer to section 3.2.1 for more information regarding these settings.

5.5 Managing Data from the PDA to the PC

TracerPlus allows easy data transfer between the PC and PDA via simple Import and export commands available from the PDA menu options. This section outlines all of the features available for PC processing.

5.5.1 How Data Is Sent to the PC

TracerPlus transfers all session data to the PC via standard Import/Export options. Importing and exporting allows for exchange of data between the PDA and the PC during ActiveSync. Depending on your ActiveSync settings, the mapping to these TracerPlus generated files can be done automatically. Before initiating the process the user must first select File -> Export Data on the PDA. Imported and Exported data is available on the PDA at \\My Documents\TracerPlus\FromPDA and \\My Documents\TracerPlus\ToPDA. These links provide you access to all of your incoming and outgoing TracerPlus data. Each session defined on the PDA generates its own independent data file. These files are appropriately named using the session number of each given session.

You can see the session number of any given session via the TracerPlus Main Screen or in the Session Settings dialog screen on the PDA. These numbers typically follow the order in which each session was created but this is not always the case. It is important to note what these session numbers are when looking for your data. The filename for each session is **Sxx_data.txt** where **xx** = the session number for that session.

For example, if you have 2 sessions defined on the PDA, the first session listed would generate a file named **S01_data.txt** and the second defined file generates a file named **S02_data.txt**.

5.5.2 Viewing Data Files on the PC

Data files sent to the PC can be quickly viewed by selecting the appropriate file setup for synchronization mapping via ActiveSync.

5.5.3 Linking TracerPlus Session Data to an MS Access Table

Microsoft Access is an affordable and popular database that can be utilized to manage TracerPlus data. To import TracerPlus session 1 data, file name **S01_data.txt**, follow these steps:

1. In MS Access, open your database or create a new database.
2. Select File.
3. Select Get External Data.
4. Select Import.
5. In the Import dialog box, select Files of type: Text files (*.txt).
6. In the file name list box enter the path to S01_data.txt created on the PDA.
7. Select Import.
8. Follow the Import Wizard steps to complete the import.

PTS also offers an add-on product to directly connect to your ODBC database (including MS Access) that may be a better solution for many users. This application is discussed in more detail in section 5.6.5, or visit www.ptshome.com for more details about **ODBC Link for TracerPlus**.

5.5.4 Linking TracerPlus Data to an MS Excel Worksheet

MS Excel allows text files to be opened directly in Excel. Following just a few simple wizard dialog screens allows most users to painlessly view their data in an easy to read MS Excel worksheet.

1. In MS Excel, select File→Open.

2. Browse to the TracerPlus generated text file.
3. Select the file and Click **Open**.
4. Answer any questions regarding the type of data file as is appropriate.
5. You should now see your TracerPlus data displayed in MS Excel in a familiar spreadsheet format.

5.6 ActiveSyncing Data from the PC to the PDA

TracerPlus allows you to send databases from the PC directly to your TracerPlus sessions on the PDA. Our customers find this an invaluable tool and utilize it many different ways. For example if an inventory control manager needs to distribute pick lists he simply saves the inventory file to the **\\My Documents\TracerPlus\ToPDA** folder on the PDA for later import to TracerPlus. If a maintenance manager needs to distribute jobs, he distributes the job files to the maintenance personnel's **\\My Documents\TracerPlus\ToPDA** folder. The scenarios in which this feature can be used are limitless!

Many of our customers connect their TracerPlus sessions with 3rd-party databases to give their current systems added functionality. By exporting their databases from Microsoft Access, Excel or any other database, these data files can easily be created and distributed.

5.6.1 Sending Session Data to the PDA

All data prepared for upload to the PDA must be stored in a folder called **ToPDA**. This folder must be located under the **\\My Documents\TracerPlus** folder on the PDA. These folders are automatically created when running TracerPlus on the PDA.

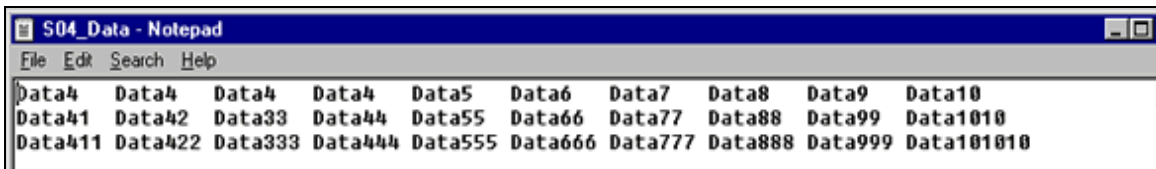
Note: If you are using the Custom ActiveSync Folder feature (Pro version only), the **ToPDA** folder will be located in the Custom ActiveSync Folder you specified under Session Settings→ActiveSync

TracerPlus allows tab-delimited files to be sent from the PC to the PDA. The data file must be named exactly the same as the data generated by the ActiveSync process. So, for example, if you want to upload data for Session 2 on the PDA, the filename must be **S02_data.txt** and must be located in the **ToPDA** as described above. Once the PDA is ActiveSynced the user simply has to select file→Import data on the PDA and the data will be available in TracerPlus.

The required file definition for sending session data from the PC to the PDA is as follows. **<CR>** indicates a carriage-return (line break), and **<tab>** indicates a tab character.

```
Field1<tab>Field2<tab>Field3<tab>....Field9<tab>Field10<CR>  
Field1<tab>Field2<tab>Field3<tab>....Field9<tab>Field10<CR>
```

Below is a sample data file prepared for upload to a TracerPlus session.



A sample upload session file is located with this install. If you wish to test the functionality of this feature, simply place that sample file in the **ToPDA** subfolder and set its name to the appropriate session.

Note: If you define data for a session number that does not exist on the PDA, it will be ignored.

Note for New Users of Windows: Some versions of Windows will not display the file extension (e.g., “.txt”). On those systems, if you save a file as “**S01_data.txt**”, it will actually store the file as “**S01_data.txt.txt**”. This file will not be recognized by TracerPlus. To check the actual name of a file you’ve created, right-click on it in Windows Explorer and choose “Properties”.

5.6.2 Creating Session Data Files with Excel

To create a session data file with Excel, follow these steps.

1. Open the file in Excel
2. Select **File** from the Menu bar
3. Select **Save As**
4. In the Save As dialog box, select **Save As Type**: Text (Tab Delimited)
5. Save your session to
\\Mobile Device\\My PocketPC\\My Documents\\TracerPlus\\ToPDA\\S01_data.txt
6. Close the Excel file
7. Perform a File→Import from TracerPlus on the PDA.

5.6.3 Sending Drop-Down Lists to the PDA

TracerPlus also allows the user to prepare and manage Drop-Down lists on the PC for later upload to the PDA running TracerPlus. The filename of list data to be uploaded must be named **SxxFyy.txt** where

xx = the session number

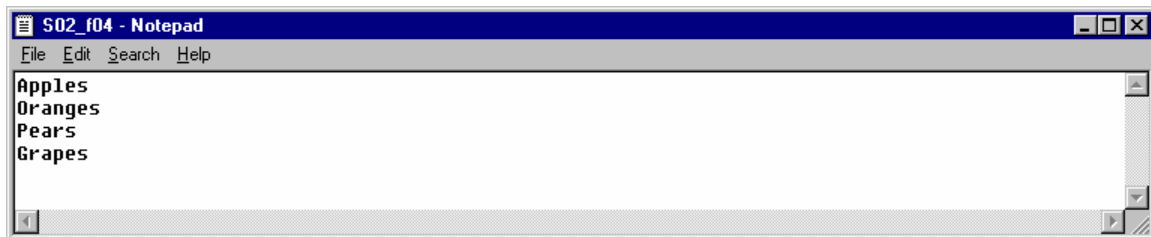
yy = the field number

For example, if you want to send the list contents for session 2 in the 4th field, the filename must be named **S02F04.txt**.

Note: Simply sending the list contents for a particular session and a particular field does not automatically define that field as a drop down list. This must still be set in the **Field Settings** screen of the PDA application. Please refer to **Chapter 4** for instructions on setting field properties.

The format for the list files is very simple. Each list element must be stored on its own line. Since there is only one field, there is no need for a **<tab>** delimiter between fields.

A sample of what this data must look like is as follows.



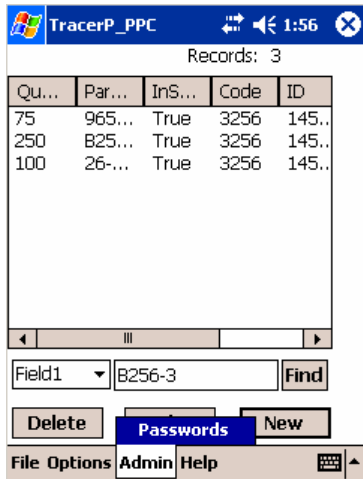
A sample upload list file is located with this install. If you wish to test the functionality of this feature, simply place that sample file in the **ToPDA** subfolder and rename it to the appropriate session number and field number.

Chapter 6: Administration Settings

Once sessions are configured, it is customary to implement password protection so field personnel cannot easily alter the session settings. When a **Password** is set, a user is required to enter this **Password** to access any areas protected by the TracerPlus Admin Settings. Administrators commonly **Enable Protection** for **Session Settings** and **Field Settings**. Below you will learn how to set Passwords and set protection levels for program settings as well as data.

6.1 Setting Passwords

1. Select **Passwords** in the Grid Screen
2. Select **Use Password**
3. Enter your **Password**
4. Enter additional protection levels; **Session Settings, Field Settings, Delete One Record, Delete All Records** and **Edit Records**



6.1.2 Enable Protection for

Session Settings

When protection is enabled for **Session Settings**, the user is required to enter a password to edit or add sessions.

Field Settings

When protection is enabled for **Field Settings**, the user is required to enter a password to edit or add field information.

Delete One Record

When protection is enabled for **Delete One Record**, the user is required to enter a password to delete a record from the data view screen.

Delete All Records

When protection is enabled for **Delete All Records**, the user is required to enter a password to delete all records from the menu bar.

Edit Records

When protection is enabled for **Edit Records**, the user is required to enter a password to edit a record.

6.2 Deploying Configured Sessions to Multiple Users

6.2.1 How to Copy One PDA Configuration to Other PDAs

As of version 1.0, this option is not yet available in TracerPlus for Pocket PC.

6.2.2 File Names Used by TracerPlus

This section lists the various file names used by TracerPlus on the PC. It is here for your reference in deploying and troubleshooting your TracerPlus configuration.

Note that sessions are identified by their session number, e.g. “**S01**”, and fields are identified by their field number, e.g. “**F02**” (with “S01F02” indicating the first session and second field).

Upload Filenames: (located in the “ToPDA” folder)

Data Records	S01_Data.txt
Drop-Down Lists	S01F02.txt

Backup Filenames: (located in the “Palm*username*\backup” folder)

Session definitions	PPTP-TracerPlus_Sessions.pdb
Data Records	PPTP-Data_S01_30.pdb (Pro mode)
Data Records	PPTP -Data_S01_10.pdb (Standard mode)
Drop-Down Lists	PPTP -List_S01F02.pdb
Bitmaps (signatures)	PPTP -Bitmap_S01.pdb (Pro mode only)
Field Hints	PPTP -Hint_S01.pdb (Pro mode only)
Print Formats	PPTP -TracerPlus_Formats.pdb (TracerPlus Print only)