

Tracer

for Windows Mobile and Pocket PC

TRACER Version 1.0

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for Windows Mobile 2003 and Pocket PC

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Chapter 1: Introduction

1.1 Introduction

PTS is proud to introduce Tracer for Windows Mobile 2003 and Pocket PC. Tracer offers unmatched flexibility and speed in capturing and analyzing data for most inventory control and asset management tasks. Tracer was designed for use in both standard Pocket PC devices and Pocket PC bar code enabled terminals including Symbol's PPT series. Take control of your inventory, your assets or just about any other piece of remote information you need now with Tracer.

Tracer is an application written to provide the user complete flexibility in both setting up and capturing data. Through the use of customizable field names to user defined flow of data capture, Tracer is the ideal solution for almost any data capture situation. Typical scenarios include asset tracking, physical inventory, order fulfillment, etc. There is almost no limit to the number of applications that can be customized to meet your needs in minutes. Tracer features custom field settings giving you the power to arrange the data entry screen into a format that works best for your particular application. Tracer's flexibility makes it the perfect solution for most data acquisition tasks, which easily can be transferred to your current database.

Chapter 2: Installation

This chapter details the steps for installing Tracer.

2.1 Automatic Installation

1. Download **tracer_ppc.exe** from www.ptshome.com or another authorized reseller.
2. Double click **tracer_ppc.exe** in the folder to which you saved the download.
3. Follow the standard installation instructions.
4. The Tracer application is now ready for use on your portable device or will be available on your next ActiveSync depending on your configuration. The Tracer application is located under **Windows\Start** Menu. It is additionally available from the Shortcuts Taskbar.

2.2 Removing Tracer

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

1. Go to the PDA→Programs→File Explorer.
2. Press and hold My Device→Windows→Start Menu→Tracer list item.

Chapter 3: System Operation

Chapter 3 details the operation of the Tracer application. Both the PDA operation and the PC operation of the system are discussed here. **Since Tracer is a flexible data capture system, to utilize all of the features of Tracer it is strongly recommended you read and understand this chapter.**

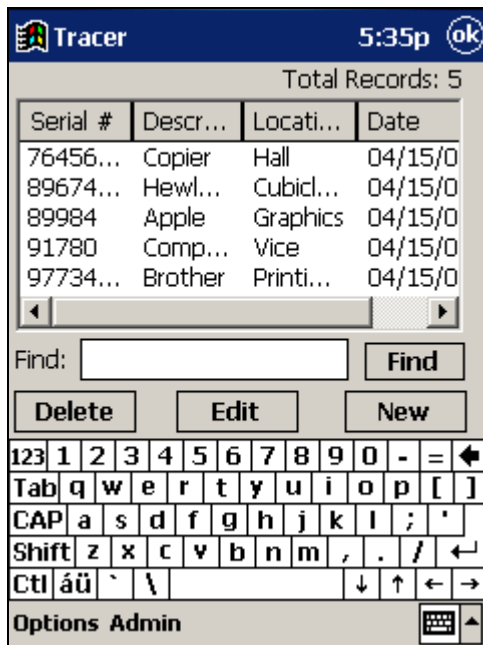
3.1 PDA Operation

Following is a screen-by-screen description of Tracer operation on the PDA. Each screen and their associated elements are discussed in detail.

3.1.1 Main Screen

The Main Screen presents the user with a grid containing the data currently stored in the database. This grid contains four columns. The headers of these columns contain the field names that you chose in the **Field Settings Menu Option**. Refer to **Setting Field Options** later in this chapter for a discussion of that topic. The four columns of this grid are resizable to fit every user's needs. For example, if the data contained in the first field is very long, you may choose to make that column wider while decreasing the size of another column.

Column resizing is accomplished by touching the pen to the screen in the column header area and dragging to the left or right. This either decreases or increases the size of the grid column respectively.



Delete Button

The **Delete** button allows the user to delete the currently selected record in the grid. After confirmation, the selected record is permanently deleted from the PDA database.

Edit Button

The **Edit** button allows the user to edit the currently selected

record. The user is taken to the **Entry Screen** where the data may be changed. Once the data has been changed, the user is returned to the **Main Screen**.

New Button

The **New** button allows the user to begin entering new records. Once clicked, the user is taken to the **Entry Screen**.

Find

The **Find** feature searches Field 1 for records with matching data in Field 1.

The Total Records

This **Total Records** display shows the total quantity of records stored in the Tracer database at that moment.

3.1.2 Field Settings Screen

The **Field Settings** screen is accessed through the device menu within the Tracer application. The **Field Settings** screen is used to customize Tracer to fit your specific needs.

Field Selector List Box (Ref. A)

The **Field Selector List Box** is located at the top left corner of the screen. The highlighted field indicates the current field for which you are changing settings. To set the properties of the four fields, use this list box to select the field to which you would like to set.

The screenshot shows the Tracer application's Field Settings screen. At the top, the title bar displays 'Tracer' and the time '12:52p' next to an 'ok' button. On the left side, there is a vertical list box containing four items: 'Field 1', 'Field 2', 'Field 3', and 'Field 4'. 'Field 1' is currently selected and highlighted. To the right of this list box, there are two text input fields. The first is labeled 'Name:' and contains the text 'Serial #'. The second is labeled 'Default Value:' and is currently empty. Below these fields is a section titled 'After Scan'. Inside this section, there is a 'Go To:' label followed by a dropdown menu that currently shows 'Field 2'. Below the dropdown are two checkboxes: 'Auto Submit' (which is unchecked) and 'Clear On Submit' (which is checked). At the bottom left of the screen, there is a 'Done' button. At the bottom right, there is a small icon representing a keypad.

Name

The **Name** field represents what you would like to call the current field. This field name represents what the user will see when entering data for that field as well as the column header name for that particular field.

Default Value

The **Default Value** 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 Value** for that field to be 1.

Real Time Default

Tracer allows the user to utilize standard real time variables as a default for any given field. There are three variables permitted at this time.

1. [*DATE*] - Enter the current date at the time of record entry
2. [*TIME*] - Enter the current time at the time of record entry
3. [*USER*] - Enter the current username at the time of record entry

Special note: These values must be entered exactly as specified. It may be easier to use the virtual keyboard as opposed to graffiti.

Note 1: The **Default Value** is only used when the **Clear on Submit** option is selected for this field. If the user changes this value during data entry and **Clear on Submit** is not checked, the changed value is retained.

Note 2: If the user clicks the **Clear All** button from the Entry screen, this value will be cleared as well.

After Scan Options

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 will set the focus to whatever you selected in this area. The user typically uses this feature to control the 'flow' of the data entry. Alternatively, the Down arrow key represents an 'After Scan' event for those PDAs that are not barcode enabled.

Auto Submit

This option represents whether or not to automatically submit this record after an 'After Scan' event. 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.

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 a successful scan 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

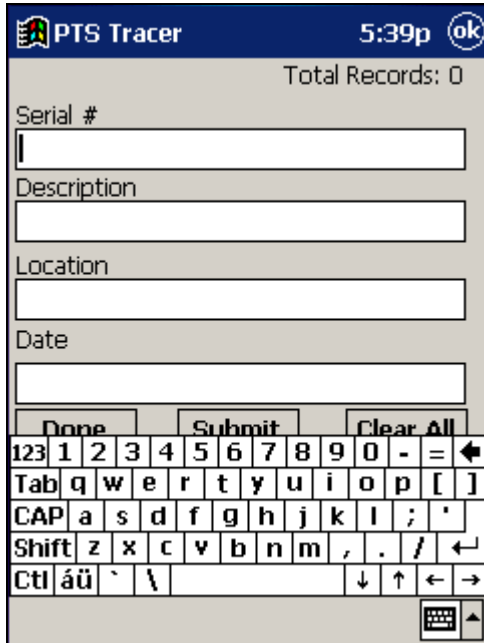
Note 1: If the user has selected a **Default Value** for the field, the default value is placed in the particular field when **Clear on Submit** is selected

Done

Once you have set up all the fields and their associated properties, you are returned to the Main Screen. Note that the grid column headers now reflect the changes you made to the field names.

3.1.3 Data Entry Screen

The Entry Screen is the area where the user does his data entry. The four fields are presented to the user with the customized field names shown. The user enters data for each record presented. When the data is being scanned, the system controls the flow to the next field based on the Field Settings entries previously configured. This screen contains three buttons. These are discussed below.



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 is next in the tab order based on the field that had the focus just prior to clicking the Submit button.

Clear All Button

Clicking the **Clear All** button clears all the data from all of the 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.

3.1.4 About Screen

The About Screen provides information about the application. Current Version number information is stored. PTS sales and Support contact information is also supplied on this screen.



3.2 Exporting data

Data captured from the PDA is exported to a file usable by the PC through the menu choice **Export File**. This menu choice is available from the Main Screen within the Tracer application. Selecting this menu option creates a comma delimited text file on the PDA containing all of the captured data. This file is located on the PDA in the **My Documents\Tracer** folder. The filename is Tracer.txt.

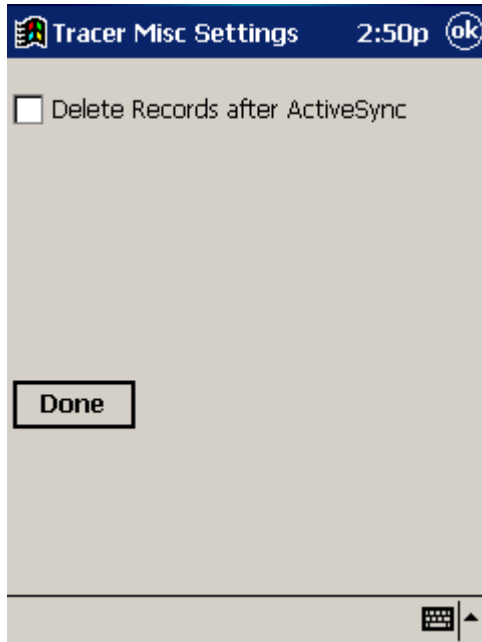
Tracer has two methods to remove data from the PDA.

1. The user can select **Delete All** from the **Options** menu.
2. The user can choose to **Delete Records after ActiveSync**. This option is accessible from the **Admin-->Misc Settings** Settings menu.

Note: Only five records are transferred in an unregistered version of Tracer. Once the application is registered, all records are transferred.

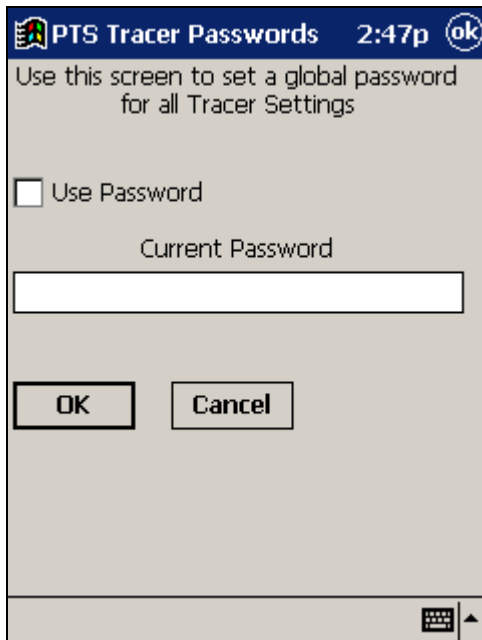
3.2.1 Delete Records After ActiveSync

Select **Delete Records After ActiveSync** if the data should be removed from the PDA after a successful ActiveSync. Note that if data is not successfully transferred to the PC, as a safety precaution, it will not be deleted from the PDA even when this option is enabled.



3.3 Passwords

The Passwords setting screen is accessed through the **Admin** menu. When a **Password** is set a user is required to enter this **Password** to access **Field Settings** and **ActiveSync Settings**.



Chapter 4: Registering Tracer

4.1 Registering Tracer

Tracer is an application that requires registration for full functionality. The trial version of Tracer limits the number of records exported to the PC comptable file. The full version does not contain this limitation.

PTS encourages all users who benefit from Tracer to register their copy. To register Tracer, we only require your Tracer User ID and an Email address. We generate a unique serial number based on this User ID so it is important that you send the ID Exactly as it appears in the Tracer Splash Screen.

At the time of purchase you will be asked for your Tracer User ID. If you do not submit a User ID at the time of purchase, or you purchase Tracer through a reseller, you can submit your User ID(s) via the registration request page located at <http://www.ptshome.com/regrequest>. PTS will return a registration code to the email address submitted within 24 hours of submittal.

4.2 Entering the Registration Code

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

4.3 Support

As a registered Tracer user you are entitled to free email support for three months from date of purchase. PTS will be available to answer Tracer questions as well as general bar coding questions. Our goal is to provide Tracer users the tools to capitalize on the efficiencies of bar code data acquisition. To contact PTS support email support@ptshome.com or at 1-877-640-4152. Please allow us 24 hours to respond although it is often much faster.