

Track'Em™ User's Manual

Version 2.1

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RVB Systems Group

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Track'Em™ System Introduction

Track'Em™ is a PC based inventory and asset tracking system. It was developed for ease of use right of the box. Track'Em consists of a PC database system (includes password protected menu system, a Microsoft Access database, and dozens of reports), an optional portable barcode scanner (includes Track'Em PDT software) and optional barcode labeling software. Track'Em is available in five different versions:

Track'Em Lite - includes the following:

- Track'Em PC database system
- Can be used with any corded barcode scanner

Track'Em Standard - includes the following:

- Track'Em PC database system
- Portable barcode scanner pre-programmed with Track'Em PDT software
- Communications cable
- Battery and battery charger

Track'Em Deluxe - includes the following:

- Track'Em PC database system
- Portable barcode scanner pre-programmed with Track'Em PDT software
- Communications cable
- Battery and battery charger
- BarTender Professional software for barcode label printing
- Pre-designed barcode label templates for asset, inventory and location labeling

Track'Em Developer - includes the following:

- All the features of Track'Em Deluxe
- Source code for the Track'Em PC database system and the Track'Em PDT software

Track'Em QuickBooks - includes the following:

- All the features of Track'Em Deluxe
- Custom interface to Quickbooks 2003 Pro and newer

The Track'Em database allows you to track ASSET and INVENTORY data. Items are considered an ASSET if they have unique numbers, such as office equipment (serial numbers), or legal documents. Items are considered INVENTORY if 2 units have the same number, such as two boxes of copier paper.

ASSETS can be assigned a LOCATION and / or a STATUS. The status field can include an actual status code, or any information, such as user name.

INVENTORY is stored by location and the on-hand quantity is totaled for each location. Moving inventory to a location that has been designated to deplete inventory reduces on-hand inventory. This can include customers, work stations, or physical locations. Inventory is increased in the system by using the RECEIVE INVENTORY option. The terms PARTS, PRODUCTS, ITEMS and INVENTORY are used as throughout this manual to define INVENTORY.

Track'Em Installation

The following screens (Figures 1a,b & c) illustrate the Track'Em installation routine. This routine should automatically start when you insert the Track'Em CD. If this routine does not automatically start, use EXPLORER to locate and start the file named TrackEmIns.EXE file on the CD.

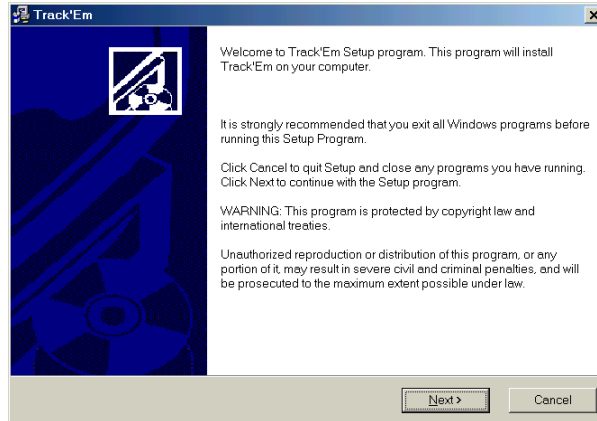


Figure 1a

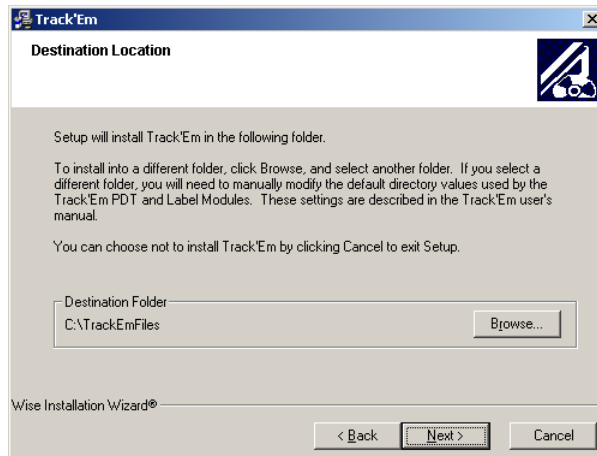


Figure 1b

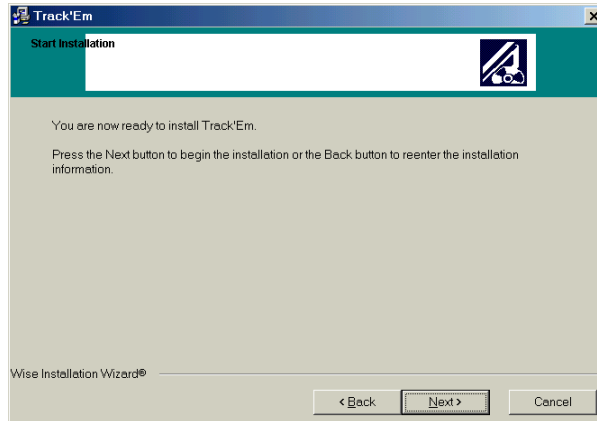


Figure 1c

PDT Communications Software Setup

If you are using the portable data terminal (PDT) available with Track'Em, then you will need to install the PDT communications software. Select the default directory (as shown in Figure 2b).

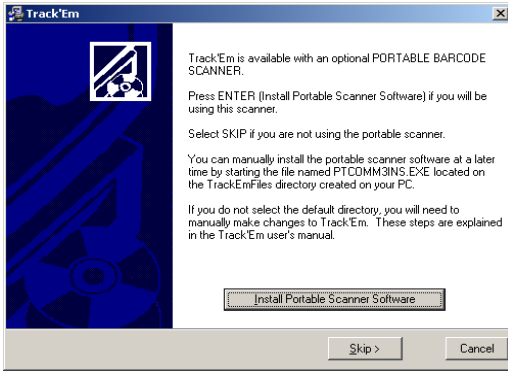


Figure 2a

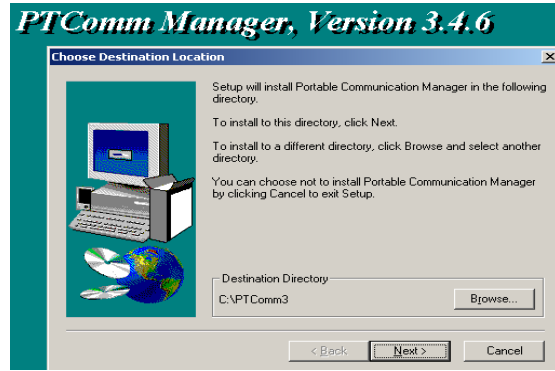


Figure 2b

Access Runtime Setup

Track'Em requires a licensed copy of Microsoft Access 2000 or higher in order to properly function. If you do not own a copy of Access 2000 or higher, a fully licensed runtime version of Access 2000 is provided at no charge on the Track'Em CD. This version of Access will allow you to run Track'Em (and other programs developed using Access), but it will not allow you to develop new or modify existing Access databases.

If you need to install the runtime version of Access 2000, select **INSTALL ACCESS 2000 RUNTIME** (shown in Figure 3a) and the screens shown in Figures 3b and 3c will appear. Follow the on-screen instructions in order to properly install a runtime version of Access 2000. If you skip this step, you can use Windows Explorer to locate the file named **SETUP.exe** located on the **ACCESS RUNTIME FILES** directory on the Track'Em CD.

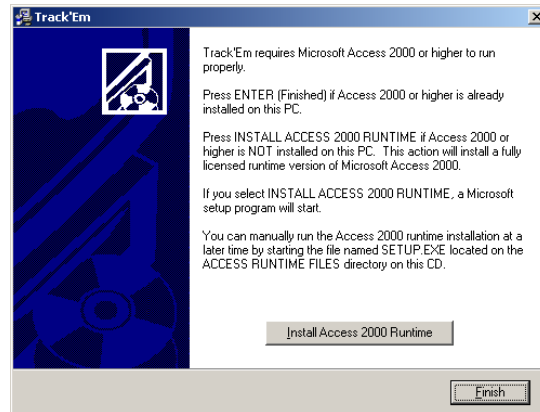


Figure 3a



Figure 3b

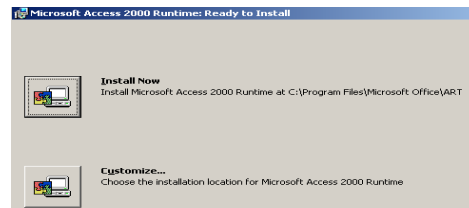


Figure 3c

Track'Em PC System

When you first start Track'Em, you will need to enter a USER NAME and PASSWORD. The system is shipped with two accounts, one is an ADMINISRATOR account and one is a USER account. You can modify these accounts using the SYSTEM ADMIN MENU once Track'Em is started. These two accounts are:

Security level	User name	Password
USER	USER	USER
ADMINISTRATOR	ADMIN	ADMIN

Table 1



Figure 4

After entering a valid account, you will see Figure 6. Figure 5 will appear if the user name / password is incorrectly entered. These values are NOT case sensitive.

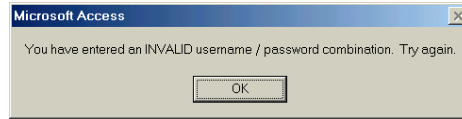


Figure 5

To activate any of the menu choices, click on the button next to the menu description. The Utility Menu shown in Figure 5a allows you to print, find and sort records in Track'Em. Descriptions of each menu option follow.



Figure 5a

Main Menu



Figure 6

Inventory Data Entry Menu

Track'Em defines PRODUCTS as items that are not uniquely numbered, like boxes of printer paper, pipe fittings, or other non-serialized items. PRODUCT records contain information about a specific product. INVENTORY records contain only the product number, location, quantity in that location, and date last updated.



Figure 7

You are able to Add or Update PRODUCT records via the screens shown in Figure 8, 9 and 10. Figure 11a illustrates the INVENTORY DATASHEET form. Figures 9 and 10 are available via the ADVANCED PRODUCT ENTRY MENU.

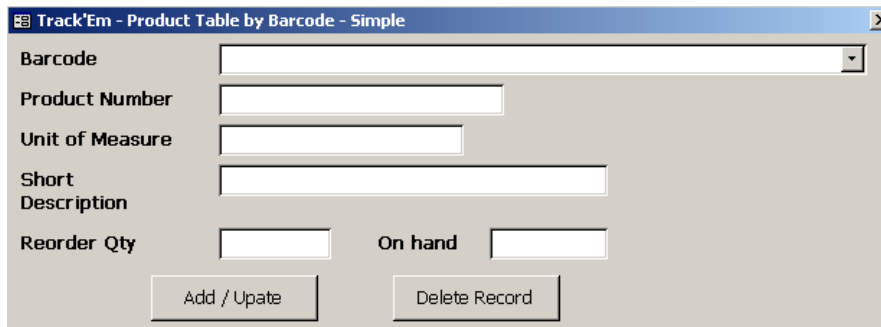


Figure 8

Figure 9 illustrates all of the fields available in the PRODUCT table. Many of these fields are user definable (See the SYSTEM ADMIN section). You can change the on-screen descriptions (CAPTIONS) of any of these fields using the SYSTEM ADMIN / ADVANCED SYSTEM ADMIN MENU / CUSTOMIZED FIELD CAPTIONS). Your customized caption will be shown on the form views, datasheet views and simple reports.

If a field is grayed out and has no caption, then it has been disabled using the CUSTOMIZE FIELD CAPTIONS option in the Advanced System Admin Menu.

Many of the Track'Em forms (such as Figure 8) can be used with a tethered scanner. Merely scan the barcode and the associated database record will appear on the form.

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Figure 9

You can add, edit or delete records using the datasheet form (Figure 10). To add a record, merely start typing on the new line (indicated by an ASTERICK at the start of the line). After entering data for each field, pressing the ENTER key will add a new record.

To delete a record, select that record and click the DELETE SELECTED RECORD button. You can also print the datasheet to any available printer. Keep in mind that you can select which columns to display (SYSTEM ADMIN / ADVANCED SYSTEM ADMIN MENU / CUSTOMIZED FIELD CAPTIONS). This feature is discussed in the System Admin section of this manual.

Track'Em - Product Data		
Barcode	Product Number	Short Description
123	12-Z-AB	Red widget
1200	12-00-az	Yellow sprocket
2300	23-zx-7	Violet Widget
*		

Figure 10

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The datasheet form will display additional drop-down information for some columns as shown in figures 11a and 11b. Clicking on these columns will yield the drop-down. Data in the drop-down cannot be changed (except dates as shown in Figure 11b).

Track'Em - Inventory Data					
Location	Qty	Date Last Updated	Barcode	Price Each	
2	86	09/08/2003	123	\$3.00	
1	12	09/08	Barcode	Product #	Description
			123	123	test 123
			456000	1000	test of 456 - updated
			asdf	12444	asdf

Figure 11a

When Entered						
03/02/1998						
March 1998						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4
5	6	7	8	9	10	11
Today: 03/04/2003						

Figure 11b

Note: Changing INVENTORY records using form 11a will NOT create Inventory History records.

Data entered from the INVENTORY RECEIVE screen (Figure 12) will yield the following changes to the database:

- A new record is appended to INVENTORY HISTORY table.
- A record is added to INVENTORY table using the TO LOCATION if there are no inventory records with this location. If an inventory record with this location already exists, then the entered quantity is added to the existing quantity.

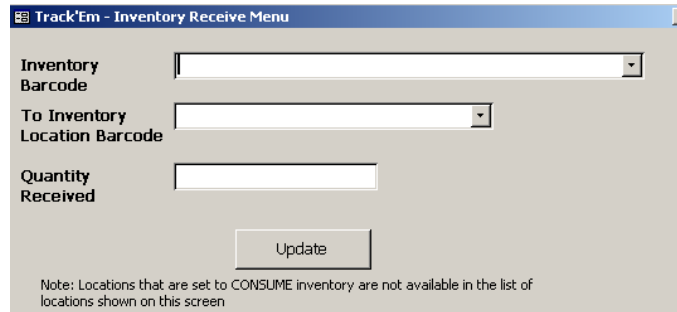


Figure 12

Data entered from the INVENTORY MOVE screen (Figure 13) will yield the following changes to the database:

- A new record is appended to INVENTORY HISTORY table.
- If the TO LOCATION is NOT a CONSUME LOCATION, then a record is added to INVENTORY table using the TO LOCATION if there are no inventory records with this location. If an inventory record with this location already exists, then the entered quantity is added to the existing quantity.
- If the TO LOCATION is a CONSUME LOCATION, then no record is added to the INVENTORY table.
- Update the INVENTORY table record for the FROM LOCATION value. The quantity entered on the form is subtracted from the existing quantity to reflect the new quantity. If the new quantity is less than zero or equal to zero, then the record is deleted.
- Note: Not all locations will be displayed in the FROM LOCATIONS dropdown list box – only those locations that actually contain the item selected.

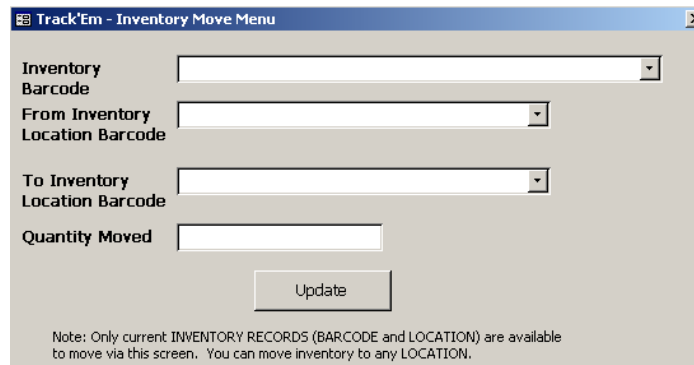


Figure 13

Inventory Reports Menu

The INVENTORY REPORTS MENUS (Figure 14a, b & c) contain ready to use reports. Keep in mind that you can also print reports using the datasheet form option. With the datasheet form, you can select which columns of a datasheet to display (SYSTEM ADMIN / ADVANCED SYSTEM ADMIN MENU / CUSTOMIZED FIELD CAPTIONS). This feature is discussed in the System Admin section of this manual.



Figure 14a



Figure 14b



Figure 14c

You can print any report by merely RIGHT CLICKING and selecting an option from the choices shown in Figure 15.

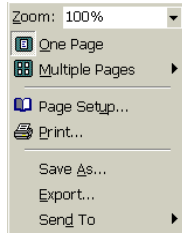


Figure 15

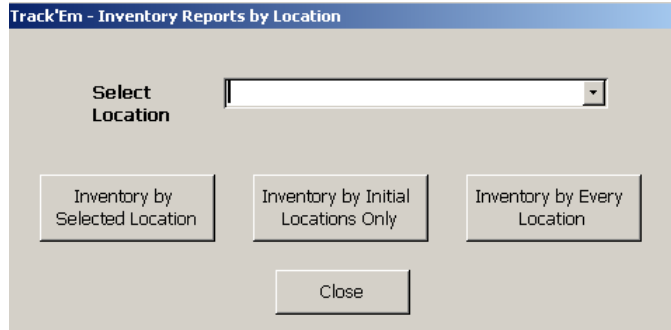


Figure 16a

Figure 16a represents one method of selecting which inventory records to display in report. The INVENTORY BY INITIAL LOCATIONS ONLY option in Figure 16a will display a report containing all inventory records that have a current location with a status of INITIAL LOCATION. This value (INITIAL LOCATION) is set for locations using the System Admin menu.

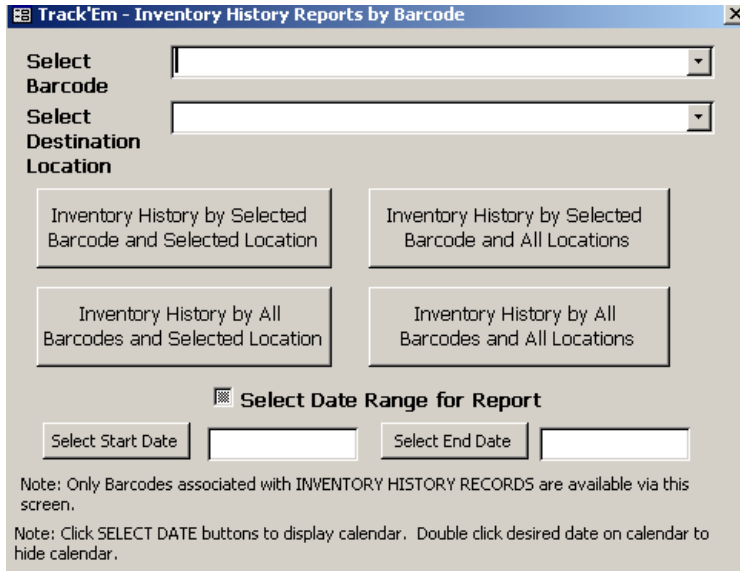


Figure 16b

Figure 16b represents one method of selecting inventory history records to display in a report. You can elect to specify a date range, select a specific barcode, location destination, or product number.

Assets Data Entry Menu

Track'Em defines ASSETS as items that are uniquely numbered, like computers, customer files or office furniture. ASSET records contain information about a specific ASSET, including its current location and status. ASSET HISTORY records show where an asset has been and what its status was at that time.



Figure 17

There are four different PC screens for adding or editing ASSET records. Figures 18, 19 and 20 show 3 of these screens.

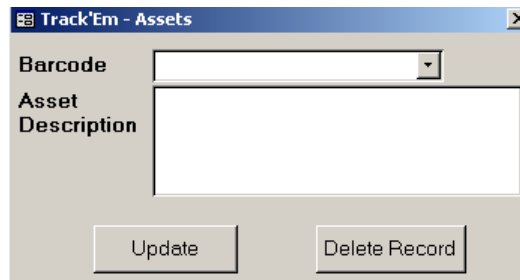


Figure 18

Figure 19 illustrates all of the fields available in the ASSET table. Many of these fields are user definable (See the SYSTEM ADMIN section). You can change the on-screen descriptions (CAPTIONS) of any of these fields using the SYSTEM ADMIN / ADVANCED SYSTEM ADMIN MENU / CUSTOMIZE FIELD CAPTIONS). Your customized caption will be shown on the form views, datasheet views and simple reports.

If a field is grayed out and has no caption, as illustrated by the 2nd field in Figure 19, then it has been disabled using the CUSTOMIZE FIELD CAPTIONS option in the Advanced System Admin Menu.

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Figure 19

You can add, edit or delete records using the datasheet form (Figure 20a). To add a record, merely start typing on the new line (indicated by an ASTERICK at the start of the line). After entering data for each field, pressing the ENTER key will add a new record.

To delete a record, select that record and click the DELETE SELECTED RECORD button. You can also print the datasheet to any available printer. Keep in mind that you can select which columns to display (SYSTEM ADMIN / ADVANCED SYSTEM ADMIN MENU / CUSTOMIZED FIELD CAPTIONS). This feature is discussed in the System Admin section of this manual.

The datasheet form will display additional drop-down information for some columns as shown in figures 20a and 20b. Clicking on these columns will yield the drop-down. Data in the drop-down cannot be changed (except dates as shown in Figure 20b).

Track'Em - Asset Data			
User Defined Text Field 5	Label Name	Location	Status
		1	3
		1	
		2	
		1	
		2	
*			

Figure 20a

Note: Changing Asset records using Figure 19 or 20a will NOT create an Asset History record.

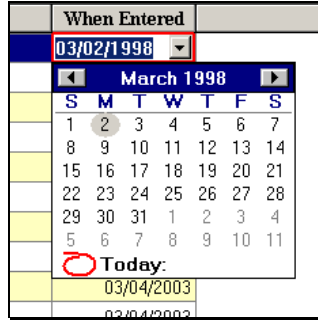


Figure 20b

Data entered from the ASSET MOVE screen (Figure 21) will yield the following changes to the database:

- A new record is appended to the ASSET HISTORY table.
- The existing ASSET table record is updated with the new LOCATION and STATUS CODE. The lookup key is the ASSET BARCODE NUMBER.

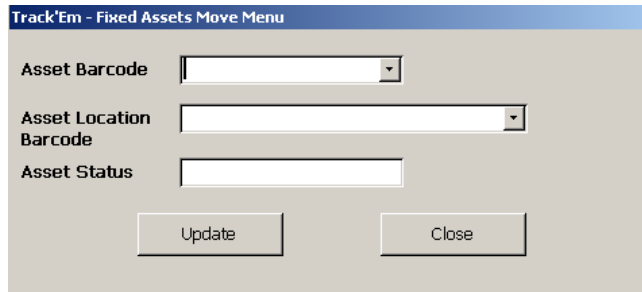


Figure 21

Assets Reports Menu

The ASSETS REPORTS MENUS (Figures 22a & b) contain ready to use reports (Figures 23 & 24). Keep in mind that you can also print reports using the datasheet form option. You can select which columns of a datasheet to display (SYSTEM ADMIN / ADVANCED SYSTEM ADMIN MENU / CUSTOMIZE FIELD CAPTIONS). This feature is discussed in the System Admin section of this manual.



Figure 22a

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Figure 22b

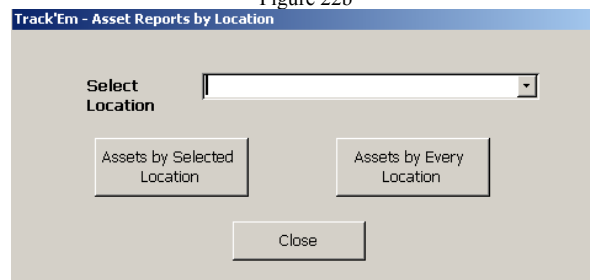


Figure 23

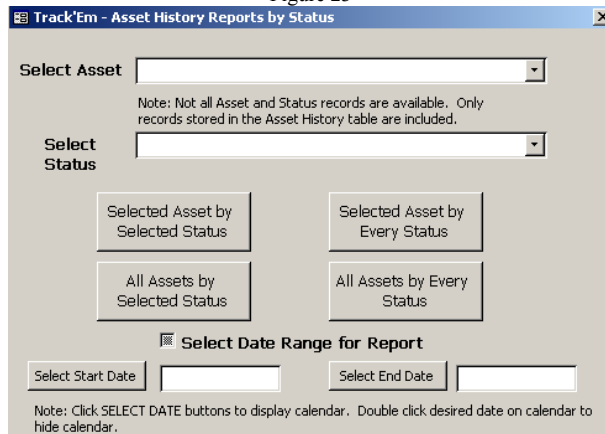


Figure 24

You can print any report by merely RIGHT CLICKING and selecting an option from the choices shown in Figure 25.

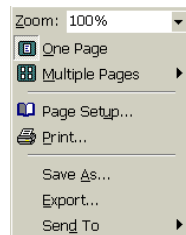


Figure 25

Upload PDT Data

See the section of this manual titled **Track'Em PDT System (Portable Scanner)**.

Import / Export Selected Data

You can import and export data using the Import / Export Selected Data option. You can import or export whatever fields you require for any of the tables shown in the TABLES list box.

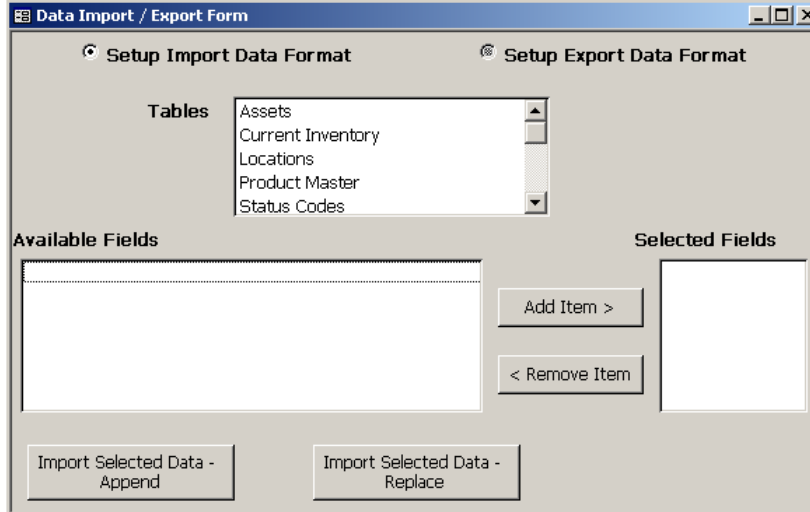


Figure 26

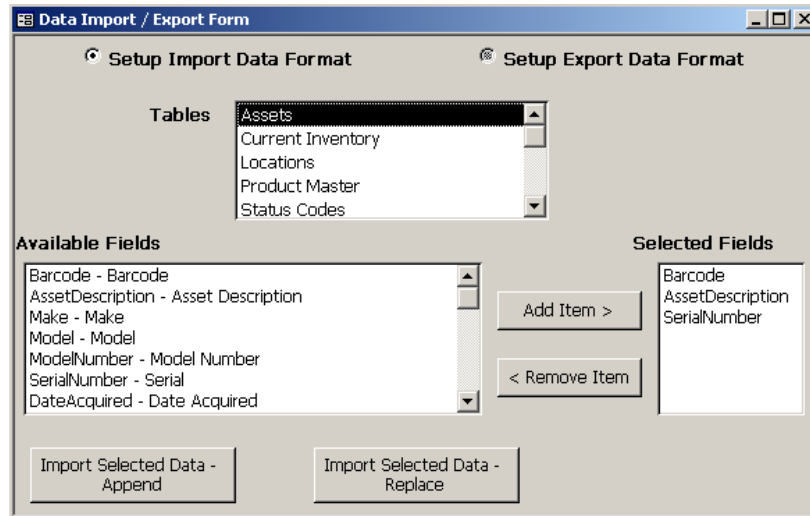


Figure 27

Table Description	Actual Table Name
Assets	tblAssets
Product Master	tblProducts
Current Inventory	tblInventory
Locations	tblLocation
Status Codes	tblStatus
Asset History	tblAssetHistory

Table 2

In order to import data (Figure 28), you must first save it as a comma-delimited text file. You will be prompted for the import or export file name. You can append new data to the existing data in a table, or you can replace the existing data with new data. Text fields must be enclosed by double quote marks, as shown in the examples on the following pages.

If you select Append, you will encounter an error message (Figure 28) if Track'Em attempts to add duplicate data keys. The key fields are defined in Tables 3,4,5 and 6 below.



Figure 28

IMPORTANT NOTE: DO NOT INCLUDE A HEADER LINE IN YOUR IMPORT DATA FILE.

Assets - BARCODE NUMBER (FIELD 1) IS KEY FIELD (NO DUPLICATES)

Field Number	Field Name	Required in Data File	Field Type & Size
1	Barcode (KEY)	YES	TEXT - 20
2	AssetDescription	NO	TEXT - 50
3	Make	NO	TEXT - 50
4	Model	NO	TEXT - 50
5	ModelNumber	NO	TEXT - 50
6	SerialNumber	NO	TEXT - 50
7	DateAcquired	NO	DATE (MM/DD/YY)
8	PurchasePrice	NO	CURRENCY
9	DepreciationMethod	NO	TEXT - 50
10	DepreciableLife	NO	INTEGER
11	SalvageValue	NO	CURRENCY
12	CurrentValue	NO	CURRENCY
13	Comments	NO	MEMO
14	Description	NO	TEXT - 255
15	NextSchedMaint	NO	DATE (MM/DD/YY)
16	AdditionalInfo1	NO	TEXT - 255
17	AdditionalInfo2	NO	TEXT - 255
18	AdditionalInfo3	NO	TEXT - 255
19	AdditionalInfo4	NO	TEXT - 255
20	AdditionalInfo5	NO	TEXT - 255
21	LabelName	NO	TEXT - 255
22	LocationNumber	NO	TEXT - 16
23	StatusCode	NO	TEXT - 16
24	DepartmentNumber	NO	TEXT - 10
25	UserNumberField1	NO	INTEGER
27	UserNumberField2	NO	DOUBLE
28	UserNumberField3	NO	DOUBLE
29	UserDefinedDate	NO	DATE / TIME
30	UserDefinedCurrency	NO	CURRENCY
31	UserDefinedBoolean	NO	BOOLEAN

Table 3

Note: Boolean data is represented in a comma delimited text file by 1 or 0, where 0 is NOT CHECKED (FALSE)

Locations - 1ST FIELD IS KEY FIELD (NO DUPLICATES)

Field Number	Field Name	Required in Data File	Field Type & Size
1	LocationNumber (KEY)	YES	TEXT – 20
2	LocationDesc	NO	TEXT - 50
3	ConsumeLocation	NO	BOOLEAN
4	InitialLocation	NO	BOOLEAN

Table 4

Note: Boolean data is represented in a comma delimited text file by 1 or 0, where 0 is NOT CHECKED (FALSE)

**Products – 1ST FIELD IS KEY FIELD (NO DUPLICATES)
2ND FIELD IS REQUIRED**

Field Number	Field Name	Required in Data File	Field Type & Size
1	Barcode (KEY)	YES	TEXT - 20
2	ProductNumber	YES	TEXT – 50 (Note – this field can be duplicated)
3	ProductDescShort	NO	TEXT – 50
4	ProductDescLong	NO	TEXT – 255
5	UOM	NO	TEXT - 20
6	Reorder	NO	INTEGER
7	LastOrdered	NO	DATE (MM/DD/YY)
8	LastPrice	NO	CURRENCY
9	AdditionalInfo1	NO	TEXT - 50
10	AdditionalInfo2	NO	TEXT - 50
11	AdditionalInfo3	NO	TEXT - 50
12	AdditionalInfo4	NO	TEXT - 50
13	AdditionalInfo5	NO	TEXT - 50
14	LabelName	NO	TEXT - 255
15	DepartmentNumber	NO	TEXT - 10
16	UserNumber1	NO	LONG INTEGER
17	UserNumber2	NO	DOUBLE
18	UserNumber3	NO	DOUBLE
19	UserCurrency1	NO	CURRENCY
20	UserCurrency2	NO	CURRENCY
21	UserDate1	NO	DATE / TIME
22	UserDate2	NO	DATE / TIME
23	UserBoolean1	NO	BOOLEAN
24	UserBoolean2	NO	BOOLEAN

Table 5

Note: Boolean data is represented in a comma delimited text file by 1 or 0, where 0 is NOT CHECKED (FALSE)

Status Codes – 1ST FIELD IS KEY FIELD (NO DUPLICATES)

Field Number	Field Name	Required in Data File	Field Type & Size
1	StatusCode (KEY)	YES	TEXT – 16
2	StatusDesc	NO	TEXT - 200

Table 6

System Admin Menu

Access to the System Admin menu (Figure 29) is by default set to SYSTEM ADMIN security level. The passwords provided with Track'Em are as follows:

Security level	User name	Password
USER	USER	USER
ADMINISTRATOR	ADMIN	ADMIN

Table 7



Figure 29

You can add or edit passwords using the ADD / EDIT USERS AND PASSWORDS option (Figure 31). For new accounts, merely type a user name and password. Conform the password and set the Admin Level. Checking the ADMIN LEVEL box allows the account to access secure menu options. Passwords are hidden from view. If a USER level account attempts to open an ADMIN level option, the following message will appear.



Figure 30

To edit an existing account, select it from the dropdown list and make changes. No changes will be saved until UPDATE CHANGES is clicked.

Figure 31

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Track'Em location data is entered from the System Admin menu. Products and Assets use the same location table.

When entering Product locations, you need to specify if a location consumes inventory. In other words, when a product is moved to this location, it is deleted from inventory (i.e. removed from existing inventory location and NOT added to another inventory location).

If you are using the Deluxe version of Track'Em to label Inventory upon receipt and you would like to automatically update the database with the number of labels printed, then one location's INITIAL LOCATION value should be set to YES (TRUE) as shown in Figure 32.

Track'Em - Inventory Datasheet				
Track'Em - Location Data				
	Location Code	Location	Location Uses Inventory?	Initial Location?
▶	1	location 1	No	No
	2	location 2	No	No
	A100	location A100	No	Yes
	B200	Location B200	No	No
	C300	Location C300	Yes	No
*				

Buttons: Print, Delete Record, Close

Figure 32

Status data for Assets is entered from the System Admin menu. Keep in mind that status information is optional. If you do not want to record status information, leave it blank on the PC form or merely press the ENTER key on the PDT at the status prompt. Status data can be a code (3rd record), a descriptive word, a person's name, or anything else.

Track'Em - Inventory Datasheet		
Track'Em - Status Data		
	Status	Status Description
▶	IN	IN SERVICE
	OUT	OUT FOR REPAIR
	888	DEMO UNIT
*		

Buttons: Print, Delete Record, Close

Figure 33

Advanced System Admin Menu

The Advanced System Admin Menu (Figure 34) allows you to customize the appearance and functionality of Track'Em. These options are described on the following pages.



Figure 34

The CUSTOMIZE FIELD CAPTIONS option (Figure 35) allows you to enter your own field descriptions for any of the fields in Track'Em. These custom captions will appear in the datasheet views, advanced data edit forms, and some of the hard-coded reports provided with Track'Em.

If you do not want a field to be displayed in the datasheet view for a specific table, click the HIDE THIS FIELD checkbox shown in Figure 35.

After making any changes (including changes to HIDE THIS FIELD), click the RESET CAPTION FOR SELECTED FIELD button.

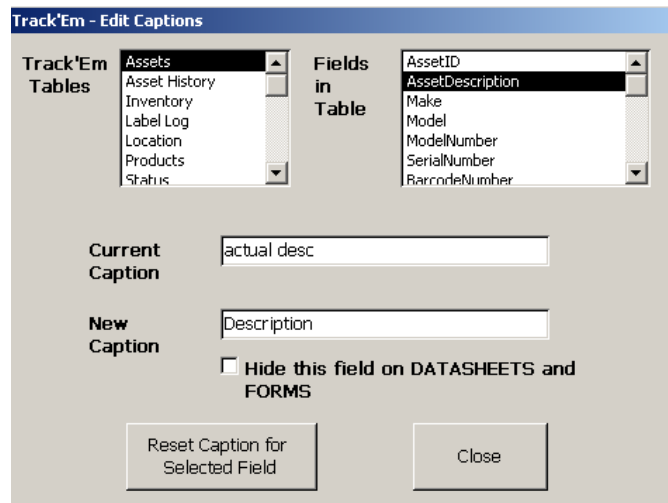


Figure 35

The title bar that appears at the top of each Track'Em menu can be changed using the form shown in Figure 36.

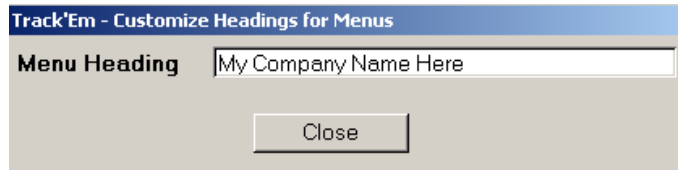


Figure 36

You can make changes to the text that is displayed on the menu screens using the form shown in Figure 37. This is also the form that is used to assign security to menus.

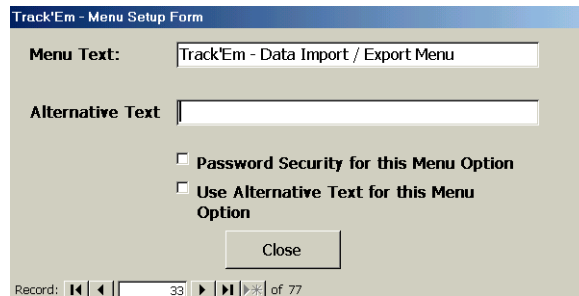


Figure 37

The PDT Setup Form is covered in the **Track'Em PDT Software** section of this manual.

The Upload Descriptions to PDT option is covered in the **Track'Em PDT System** section of this manual.

Whenever an asset is moved or an inventory record is created, a history record is also created for this event. There are stored in the Asset History or Inventory History tables. You can delete old history records using the Purge Asset History or Purge Inventory History options.




Figure 38

Track'Em is delivered with dozens of sample records. You can erase these records using the option shown in Figure 39.

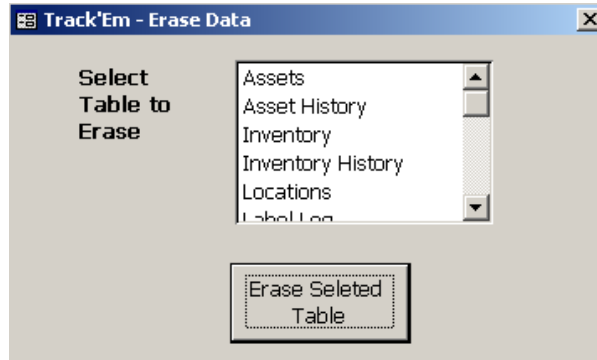


Figure 39

The following tables contain sample records:

- Assets
- Asset History
- Inventory
- Inventory History
- Locations
- Label Log
- Products
- Status Codes

Track'Em Portable Scanner (PDT)

Track'Em version 2.1 provides support for the Unitech PT630 PDT (Figure 40). This portable scanner has the following features:

- Drop Test – 1.5 meters to concrete
- Sealed against moisture and dust to IP54 standards
- Weight: 245g with battery
- Dimensions: 168mm (l) x 67mm (w)
x 35mm (h)
- Temperature:
Operation: 0° C to 50°C
Storage: -20°C to 70°C
- Humidity: 5% to 95% RH non-condensing
- Batch Communications: RS232 via RJ45
- Scanner: Laser
- Keyboard: 26 alphanumeric keys
- Main Battery: Lithium-Ion
10 hours of continual use
2.5 hours to recharge
- Display: 8 lines by 20 characters back-lit
- The following popular linear barcode symbologies
 - Codabar
 - Code 128
 - Code 39
 - Code 93
 - EAN 128
 - EAN 13
 - EAN 9
 - Interleaved 2 of 5
 - Trioptic
 - UPC Add-On
 - UPC-A
 - UPC-E
- Standard memory 512k – up to 4 MB memory available



Figure 40

Connection

Data is uploaded to your PC from the Unitech PT630 via the standard RJ-45 / RS-232 serial cable or the optional communications / charging cradle. After data is collected, merely connect the PT630 to your PC and select the “Upload PDT Data” option from the main menu (figure 41).

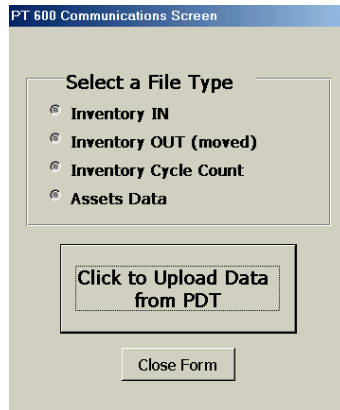


Figure 41

Figure 42 – 45 illustrate possible error screens when downloading data from the PDT to the PC. Figure 42 is shown if you do not select one of the file types in Figure 41.

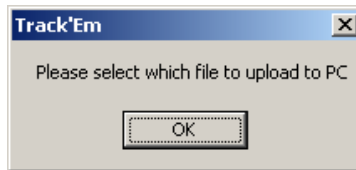


Figure 42

Figure 43 is shown if any of the following reasons:

- Cable disconnected
- Incorrect COMM PORT selected
- Incorrect file type selected
- No data on PDT
- PDT data directory (C:\TrackEmFiles\PDT_Data) does not exist on this PC

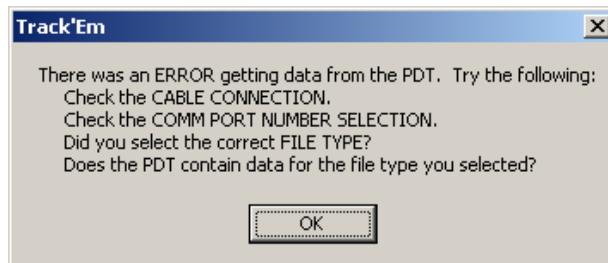


Figure 43

Figure 44 is shown if the PDT Communication Software is not located in the directory specified in Figure 54 (located in the Track'Em PDT Software section). The default is C:\PTComm3\PtComm3.exe

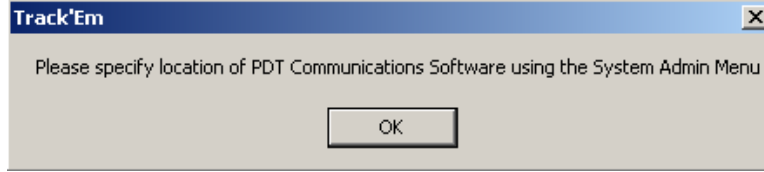


Figure 44

Figure 45 is shown if the PDT Batch File number (1 to 4) is not located in the directory specified in Figure 54 (located in the Track'Em PDT Software section). The default locations are:

- C:\TrackEmFiles\ProductIn.trk
- C:\TrackEmFiles\ProductOut.trk
- C:\TrackEmFiles\Cycle.trk
- C:\TrackEmFiles\Assets.trk

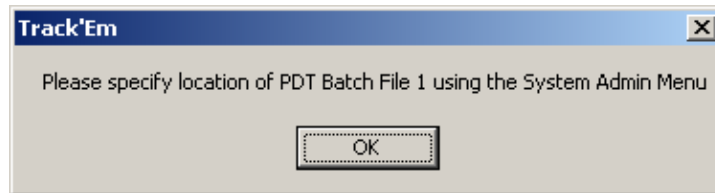


Figure 45

Battery Charging

The NiMH battery supplied with the Unitech PT630 can be recharged using the standard RJ-45 / RS-232 serial cable or the optional communications / charging cradle. Sophisticated power management automatically activates standby and shut-off modes to conserve battery life. A 30-minute low battery warning provides the user ample time to recharge the battery. The on-board battery backup provides power to the scanner if the main battery is completely drained or removed. Spare batteries are available from RVB Systems Group.

Re-Booting PDT

The Unitech PT630 has been setup to automatically start the Track'Em PDT software module whenever it is powered up. Press the RED button (second button from bottom, left hand side of keyboard) to power the unit on. The PDT will automatically turn itself off after 3 minutes of inactivity in order to help conserve the batteries.

PDT System Menu

The PT630 provided with Track'Em has been setup to function with the Track'Em system. You should not need to make any adjustments to the PT630. If for any reason you need to access the PDT System Menu, use the following steps:

1. Power off PT630 using the <PWR> (Power) key
2. PRESS and HOLD the <CMD> key and <LEFT ARROW> key at the same time.
3. PRESS <PWR> key.

Additional details regarding the PDT System Menu are available in the PDT User's Documentation.



Figure 46

The screen will display the following text:

- <START MENU>
1. SUPERVISOR
 2. WARM START
 3. COLD START

WARNING!!!

DO NOT SELECT COLD START. THIS WILL ERASE THE TRACK'EM SOFTWARE FROM THE PORTABLE.

If you accidentally select COLD BOOT and then answer YES to the ERASE ALL DATA? prompt, the Track'Em PDT software will be deleted from the PDT. You will need to download the Track'Em PDT program (named AUTOEXEC.EXE) again using the Portable Communications Manager (PTCOMM3.exe).

Connect the PDT to your PC, open the PTCOMM3 program, and select the file named C:/TrackEmFiles/AUTOEXEC.exe. Now drop and drag this file to the PDT window. If this window is not visible, open it by selecting TRANSFERS | CONNECT PORTABLE. This will automatically resend the Track'Em PDT program to the PDT.

PDT Keyboard

The Unitech PT630 allows you to enter numeric (default) and alpha characters. In order to enter alpha characters, you must first press the ALPHA key. In ALPHA mode, the cursor is an underscore. In NUMERIC mode, the cursor is a block.

In alpha mode, every numeric key has 3 associated letters. The middle letter is the default value. Use the left and right arrows to select the 1st or 3rd letter in the series.

For example:

First press [ALPHA] to switch the system to alpha mode (the cursor will be changed from block to underscore).

To enter 'A' press [1] once

To enter 'B' press [1] twice

To enter 'C' press [1] three times

After entering letters, you must press the ALPHA key again to return to NUMERIC mode.

Track'Em PDT Software

The following section describes the Track'Em PDT software module that resides on the PT630 (Figure 47) as well as basic operations of the PDT. For detailed technical information regarding operation of the PT630, consult the PT630 user's manual that was provided with the Track'Em CD.

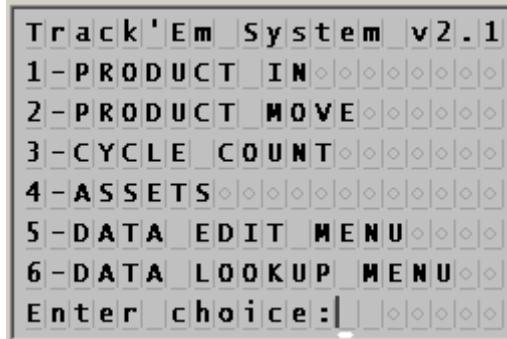


Figure 47

Main Menu Options

The Main Menu (Figure 47) has 6 options. These are:

1. Product In
2. Product Move
3. Cycle Count
4. Assets
5. Data Edit Menu
6. Data Lookup Menu

When in any of these menu choices, you can always **press the F4 key to backup.**

PRODUCT IN

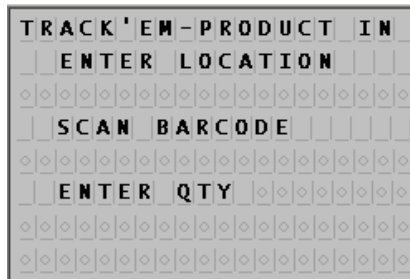


Figure 48

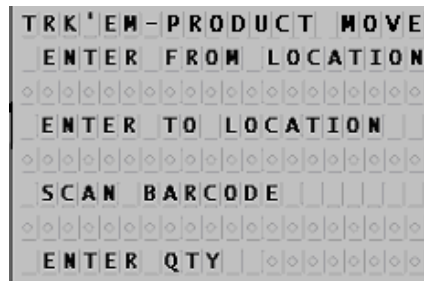
Data entered from the PRODUCT IN screens (Figures 48a, b and c) will yield the following changes to the database:

- A new record is appended to INVENTORY HISTORY table.
- A record is added to INVENTORY table using the TO LOCATION if there is no inventory record with this location / barcode combination. If an inventory record with this location /

barcode combination already exists, then the entered quantity is added to the existing quantity. If the PRODUCT and/or LOCATION do not exist, they are added to the database.

When the data is transferred to the PC, a file named PRODUCTIN.SAV is stored on the c:\TrackEmFiles\PRODUCTIN.sav. It contains multiple lines, each line containing a TO LOCATION #, BARCODE #, and QUANTITY entered.

PRODUCT MOVE



The screenshot shows a terminal-style interface for 'TRK'EM-PRODUCT MOVE'. It consists of several rows of input fields. The first row is the title. The second row is 'ENTER FROM LOCATION' followed by a grid of 16 small circles. The third row is 'ENTER TO LOCATION' followed by a grid of 16 small circles. The fourth row is 'SCAN BARCODE' followed by a grid of 16 small circles. The fifth row is 'ENTER QTY' followed by a grid of 16 small circles.

Figure 49

Data entered from the PRODUCT MOVE (OUT) screen (Figure 49) will yield the following changes to the database:

- A new record is appended to INVENTORY HISTORY table.
- If the TO LOCATION is NOT a CONSUME LOCATION, then a record is added to INVENTORY table using the TO LOCATION if there are no inventory records with this location. If an inventory record with this location already exists, then the entered quantity is added to the existing quantity.
- If the TO LOCATION is a CONSUME LOCATION, then no record is added to the INVENTORY table.
- Update the INVENTORY table record for the FROM LOCATION value. The quantity entered in the PDT is subtracted from the existing quantity to reflect the new quantity. If the new quantity is less than zero, the record will indicate zero. (Negative quantities are not allowed). If the PRODUCT and/or LOCATION do not exist, they are added to the database.

When the data is transferred to the PC, a file named PRODUCTOUT.SAV is stored on the c:\TrackEmFiles\PRODUCTOUT.sav. It contains multiple lines, each line containing a FROM LOCATION #, TO LOCATION #, BARCODE #, and QUANTITY entered.

CYCLE COUNT

TRACK'EM-CYCLE COUNT
SCAN LOCATION
SCAN BARCODE
ENTER QTY

Figure 50

Data entered from the CYCLE COUNT screen (Figure 50) will yield the following changes to the database:

- A new record is added to the INVENTORY HISTORY table.
- The existing INVENTORY table record (based on barcode number and location) is updated to reflect the new quantity. If no INVENTORY record exists for this barcode / location code combination, then one is added. Additionally, new PRODUCTS and/or LOCATIONS are also added if they are not present.

When the data is transferred to the PC, a file named CYCLECOUNT.SAV is stored on the c:\TrackEmFiles\CYCLECOUNT.sav. It contains multiple lines, each line containing a LOCATION #, BARCODE #, and QUANTITY entered.

ASSET TRACKING

TRACK'EM-ASSET TRACK
ENTER LOCATION
SCAN BARCODE
ENTER STATUS

Figure 51

Data entered from the ASSET TRACKING screen (Figure 51) will yield the following changes to the database:

- A new record is appended to the ASSET HISTORY table.
- The existing ASSET table record is updated with the new LOCATION and STATUS CODE. The lookup key is the ASSET BARCODE NUMBER. **Entry of the status code is optional and can be skipped by merely pressing the ENTER key.** New assets can be added (default) or optionally treated as invalid entries and not added. Note: Figure 55 on page 35 illustrates how to specify whether to add new assets or treat them as invalid entries.

When the data is transferred to the PC, a file named ASSETS.SAV is stored on the c:\TrackEmFiles\ASSETS.sav. It contains multiple lines, each line containing a LOCATION #, BARCODE #, and STATUS CODE entered.

DATA EDIT MENU

The Data Edit Menu (Figure 52) allows you to see how many records have been added for each type of data (Figure 53a). It also allows you to delete accidentally entered data. You can delete invalid records from the portable using one of three methods. You can merely delete the most recent record added (Figure 53b), you can delete all records and start over (Figure 53c), or you can scroll through the entire record set and select the specific record you wish to delete (Figure 53d).

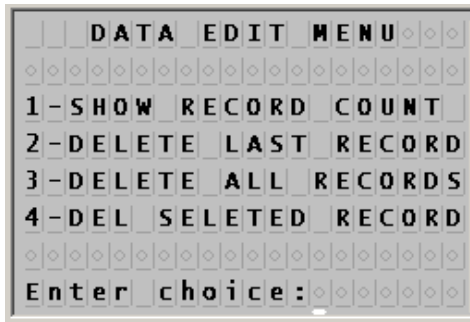


Figure 52

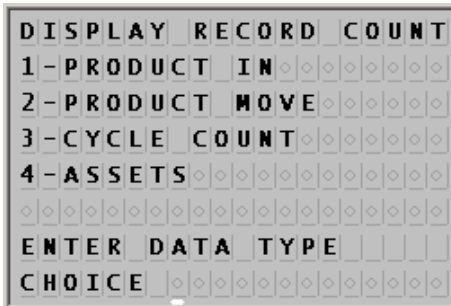


Figure 53a

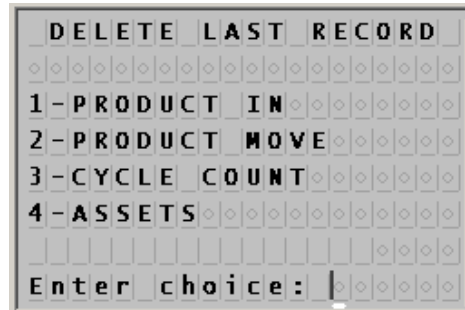


Figure 53b

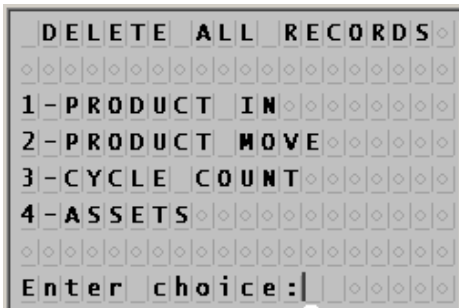


Figure 53c

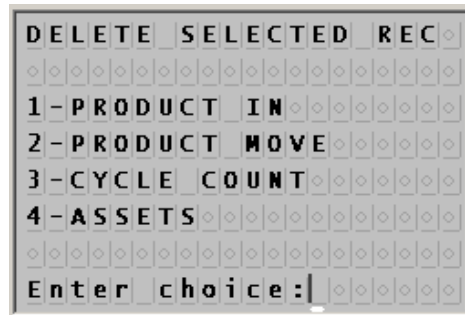


Figure 53d

- Prior to deleting data, you will need to Enter 1 (YES) or 0 (NO) to confirm your choice.
- A final screen reading "PRESS ANY KEY TO RETURN TO MAIN MENU" will be displayed after the question is answered and action is completed.

DATA LOOKUP MENU

You can optionally send (download) product, asset, location and status descriptions to the PDT. This is accomplished from the ADVANCED SYSTEM ADMIN MENU (Figure 54). The 1st 20 characters of a record's description is displayed on the PDT, either when the DATA LOOKUP option is used, or when the record is scanned during data collection via main menu items 1,2,3 or 4 (Product In, Product Move, Cycle Count, Assets).

After downloading descriptions to the PDT, a 20-character description will be displayed as shown in Figure 54b. On the PDT screen, a description will replace the barcodes that are scanned in the Product In, Product Move, Cycle Count, and Assets functions. If a description is not loaded on the PDT for a specific barcode, then the barcode number will not be replaced by anything. When data is uploaded to the PC, the barcode number is passed, not the description. If the description for a barcode is changed on the PC, it must be resent to the PDT.

The standard PDT scanner provided with Track'Em has 512k on-board memory, of which approximately 182k is available for data storage. The download files each consist of two columns as shown in Table 8. PDT's with additional memory (up to 4.5 MB) are available from RVB Systems Group.

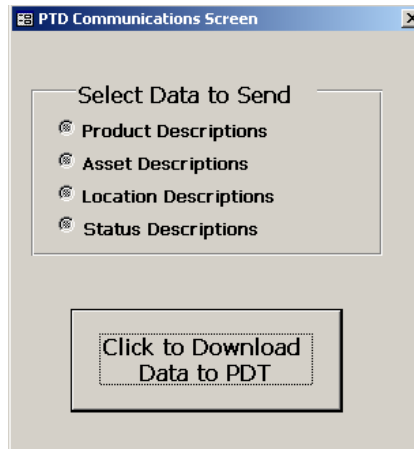


Figure 54

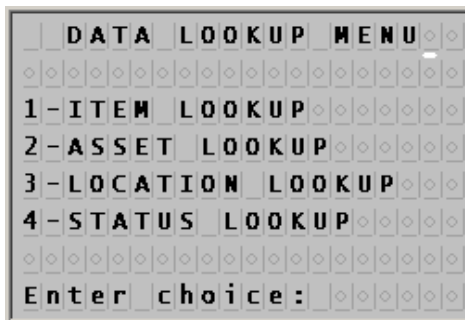


Figure 54a

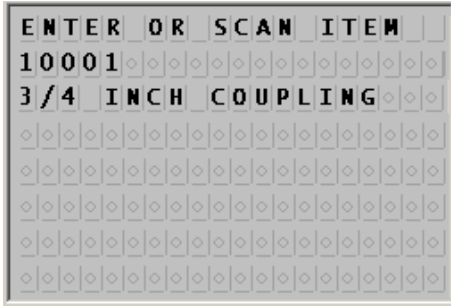


Figure 54b

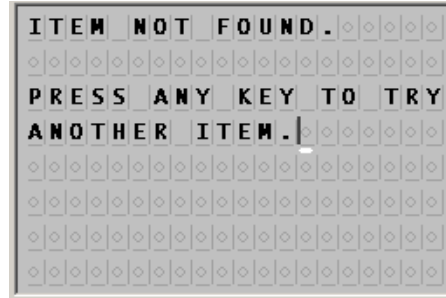


Figure 54c

Product Lookup File (C:/ILOOKUP.TXT)	
Product Barcode – 1 to 20 characters	Product Description – 1 to 20 characters
Asset Lookup File (C:/ALOOKUP.TXT)	
Asset Barcode – 1 to 20 characters	Asset Description – 1 to 20 characters
Location Lookup File (C:/LLOOKUP.TXT)	
Location Barcode – 1 to 20 characters	Location Description – 1 to 20 characters
Status Lookup File (C:/SLOOKUP.TXT)	
Status Barcode – 1 to 20 characters	Status Description – 1 to 20 characters

Table 8

The PDT is pre-loaded with 2 test records for each of the four lookup categories. These are numbers 1 and 2 for each type.

Communications Setup

The PDT communications screen (Figure 55) contains the default settings for communications and filenames used by Track'Em. These values should not be changed without support from RVB Systems Group. You may select a different COM PORT value if your 9-pin serial communications port (RS-232) is not set as COM1: If your PC has a modem or another RS-232 port, this value may need to be changed. The PDT communications software used by Track'Em will automatically connect using the correct port settings (such as baud rate, parity, etc.)

You can add new asset records to the Track'Em Asset table using the PDT if you check the “Add New Assets from PDT” checkbox. Otherwise, asset data that does not exist already in the database will be ignored when the PDT data is downloaded.

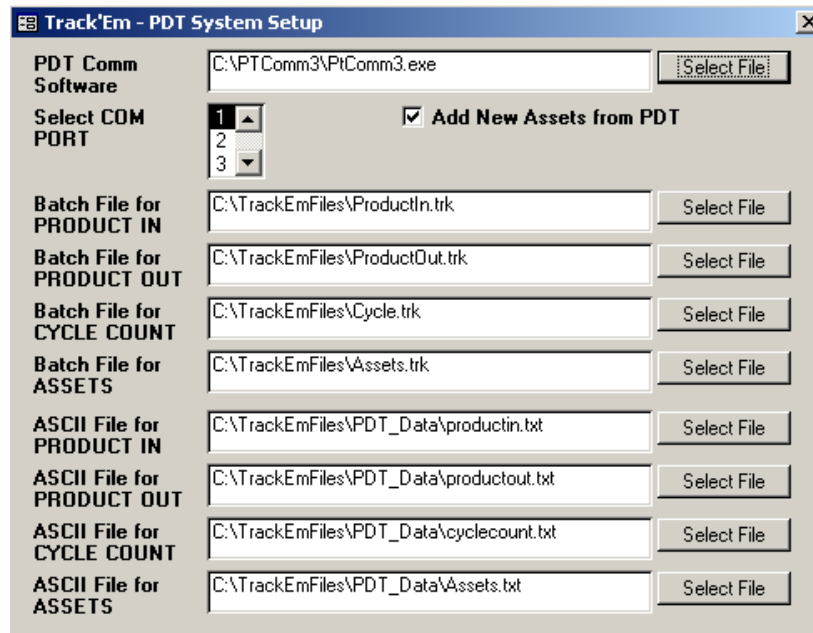


Figure 55

PDT Communications Software

The PDT communications software is automatically installed on your PC in the default directory C:\PTComm3\PtComm3.exe. This program is automatically started when you select the PDT download option from the PC.

Track'Em Label Printing Module

Track'Em Deluxe includes a label printing module (Figure 56a) which is described in this section of the manual. This option is provided with Seagull Scientific's BarTender barcode labeling software (Figure 56b).



Figure 56

Prior to running the Track'Em label printing module, Bartender Professional (provided with the Deluxe edition) must be installed.



Figure 57

After selecting the Print Labels menu option, a screen is displayed (Figure 58) which allows you to select the type of label (Asset, Items, or Locations), select that item's record using the drop down list box (Figure 59), and enter the number of labels to print.

The screenshot shows the 'Track'Em Label Printing Form' window. At the top, there is a section 'Select a Label Type' with three radio buttons: 'ASSETS', 'ITEMS', and 'LOCATIONS'. Below this is a 'Select a Type of Label' dropdown menu and an empty text input field. There are two checkboxes: 'Update inventory table with the number of labels printed' and 'Update LABEL LOG table information regarding this print job'. Below these are two radio buttons: 'Print Labels for selected record only' (which is selected) and 'Print labels for ALL records in database'. At the bottom, there is an 'Enter Number of Labels to Print' text input field and a 'Print Labels' button.

Figure 58

The screenshot shows the 'Track'Em Label Printing Form' window with the 'LOCATIONS' radio button selected. The 'Select a Type of Label' dropdown menu is open, displaying a list of locations. The list has two rows: '123 TOP SHELF - WAREHOUSE' and '456 BOTTOM SHELF - WAREHOUSE'. The other elements of the form, including the checkboxes and radio buttons, are the same as in Figure 58.

LOCATION	DESCRIPTION
123	TOP SHELF - WAREHOUSE
456	BOTTOM SHELF - WAREHOUSE

Figure 59

If you print labels for Inventory items, you have the option to update the inventory on-hand value for that item. This updates the inventory location that has been assigned an INITIAL LOCATION value of TRUE. The quantity for that item located in the initial location is updated to include the number of labels printed.

You can also PRINT LABELS FOR ALL RECORDS IN DATABASE. This option will print the NUMBER OF LABELS TO PRINT for each record in the database. You can increase the PAUSE BETWEEN SECONDS value (Figure 60) if you select PRINT ALL LABELS and labels are being skipped.

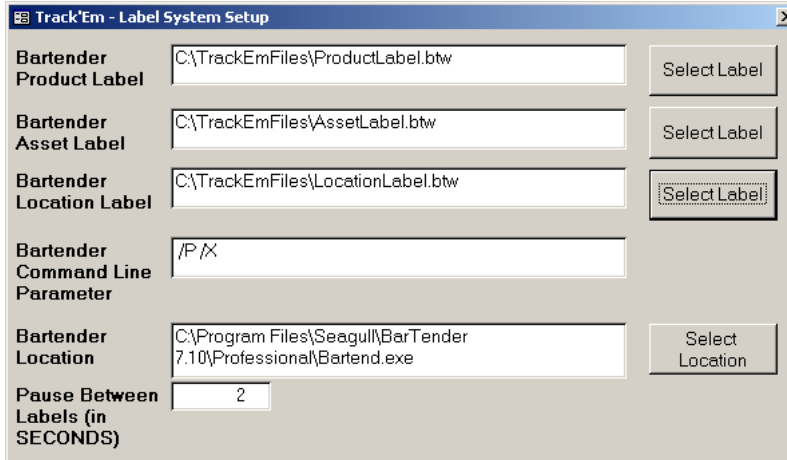


Figure 60

Each ASSET and PRODUCT record in the database can be assigned a label template name. This is done using the ADVANCED forms for products and assets (Figures 9 and 19). If no template name is assigned to a specific item, then the template name entered in the Label System Setup screen (Figure 60) will be used.

The other settings in Figure 60 are the default values and should not be modified without assistance from RVB Systems Group.

You also have the option to update the Label Log file regarding this print job. If you select this option, a record is added to the Track'Em database for each label printed. You should periodically purge this information using the screen shown in Figure 61.



Figure 61

How to Modify Default Label Templates

The label templates provided with Track'Em™ Deluxe (Figure 62) are simple examples of labels you can print using Track'Em Deluxe and BarTender. Your application will likely require more complex labels. The simplest method of creating new labels for your application is to open the existing label template and save it as another filename. You can then add objects onto the new label template.



Figure 62

After adding a new barcode or text field, right click it and Figure 63 will appear.

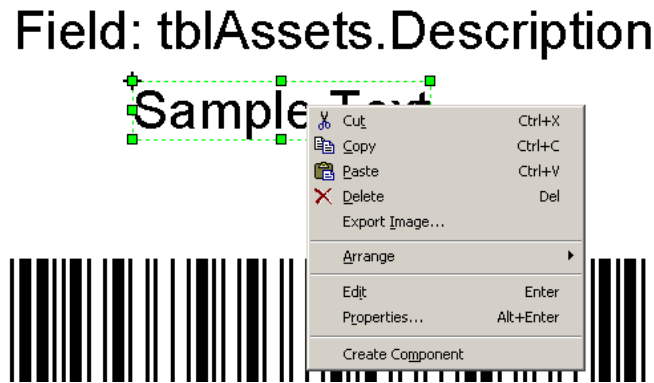


Figure 63

Select PROPERTIES and Figure 64 will appear. Change the DATA SOURCE to Database as shown in Figure 64. A list of the available fields will be displayed. In this example, the list contains the fields in the Track'Em PRODUCTS table.

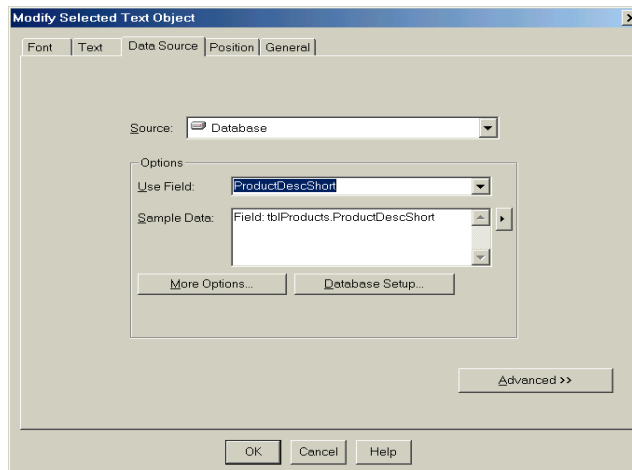


Figure 64

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Clicking on the DATABASE SETUP button shown in Figure 64 will yield the screens shown in Figures 65 - 69. **WARNING** – Changes to any of these setting will prevent Track'Em from properly printing labels.

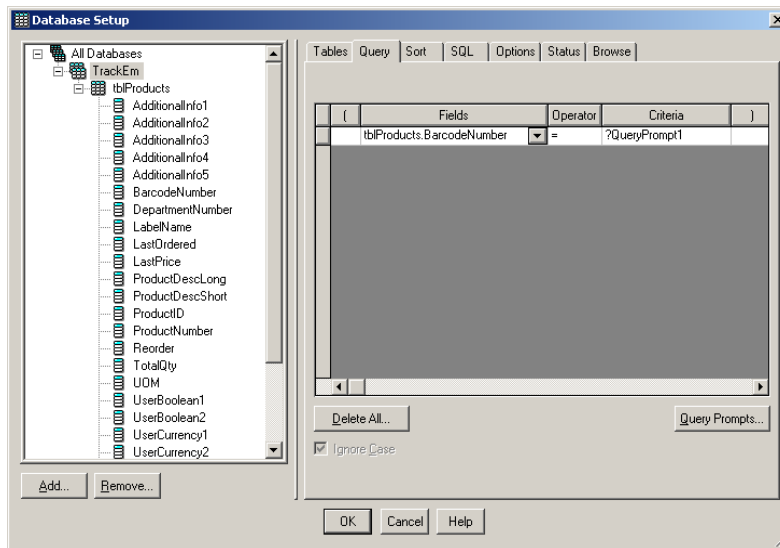


Figure 65

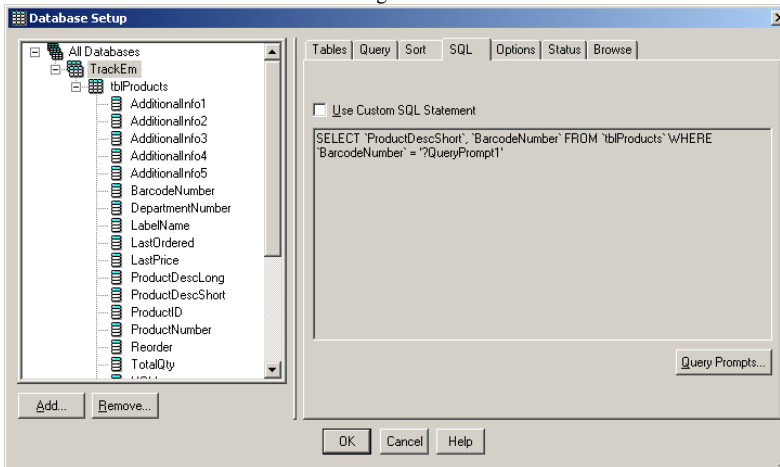


Figure 66

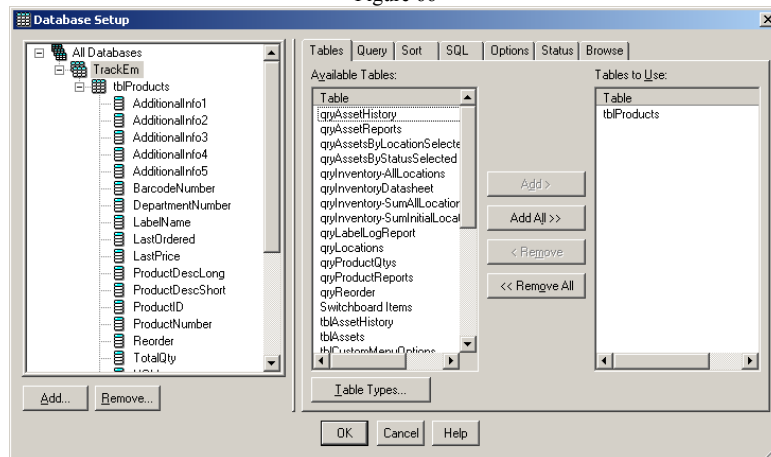


Figure 67

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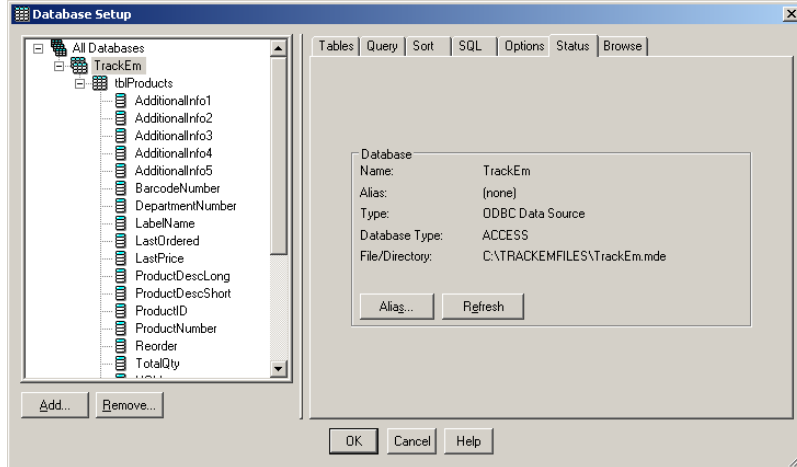


Figure 68

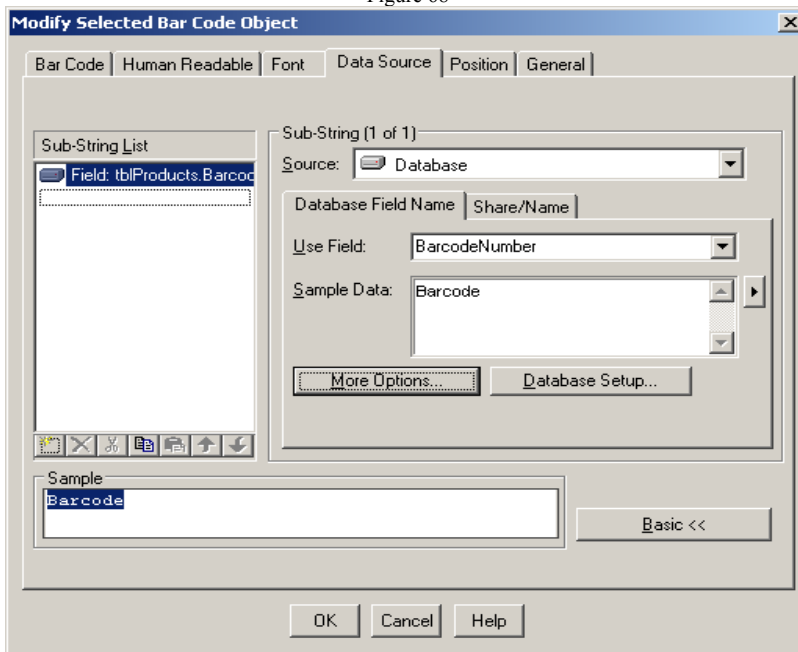


Figure 69

Figure 69 shows which database field is used for this object. If you want to use another field, select it from the USE FIELD dropdown list box on this screen. Consult your BarTender on-line help manual for additional information.

ODBC Setup for Labels

Track'Em will automatically setup the ODBC DSN (Open Data Base Connectivity - Data Source Name) described in the preceding section. This DSN will allow Track'Em to properly print labels designed using Seagull Scientific's BarTender software.

In the event this ODBC DSN is accidentally deleted or modified, the following steps should be used to reset the DSN.

Step 1 – Open Bartender. Open a new label. Select FILE | DATABASE SETUP (Figure 70).

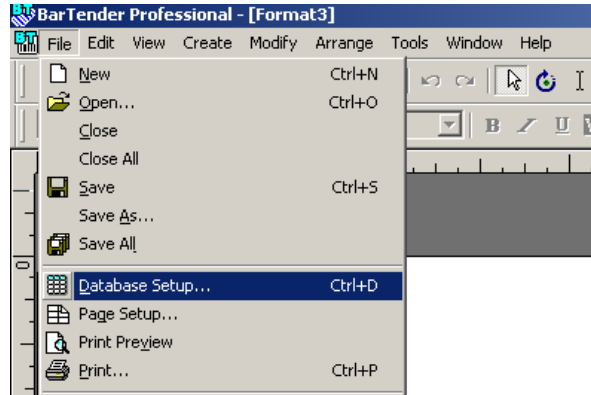


Figure 70

Step 2 – Select NEXT (Figure 71)

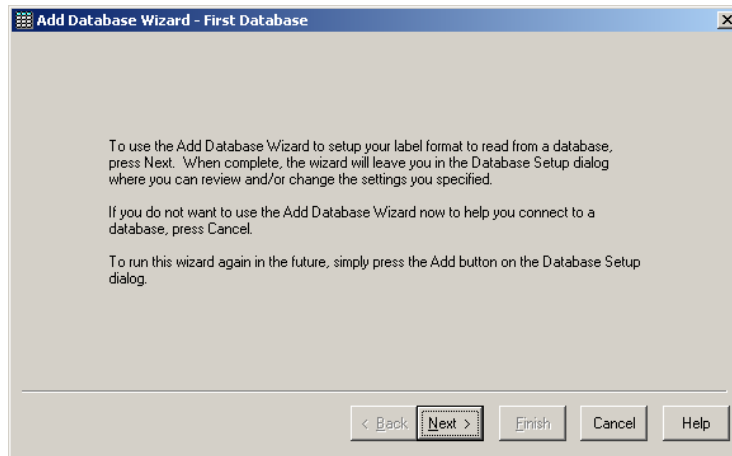


Figure 71

Step 3 – Select ODBC Data Source (Step 72) and click NEXT.

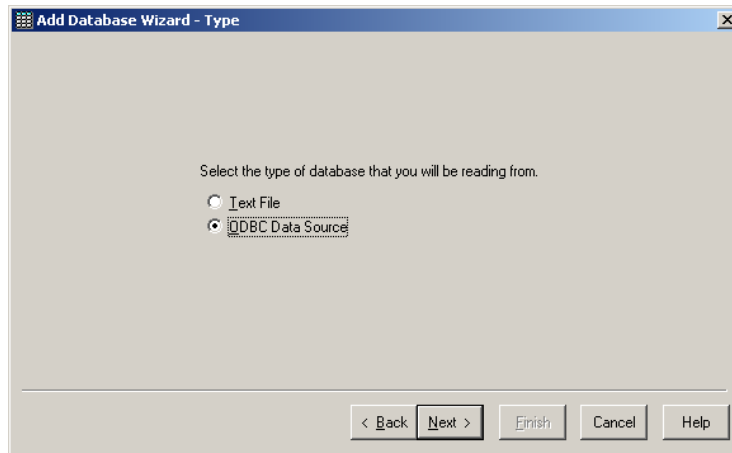


Figure 72

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Step 4 – In the TYPE dropdown, select SYSTEM DATA SOURCE and click ODBC ADMINISTRATOR (Figure 73)

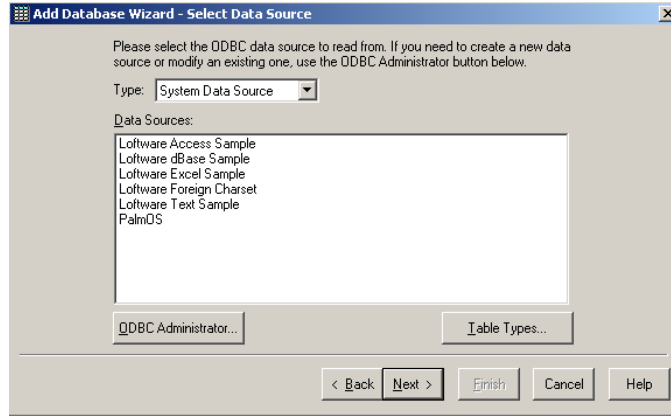


Figure 73

Step 5 – Select the SYSTEM DSN tab and click ADD (Figure 74).

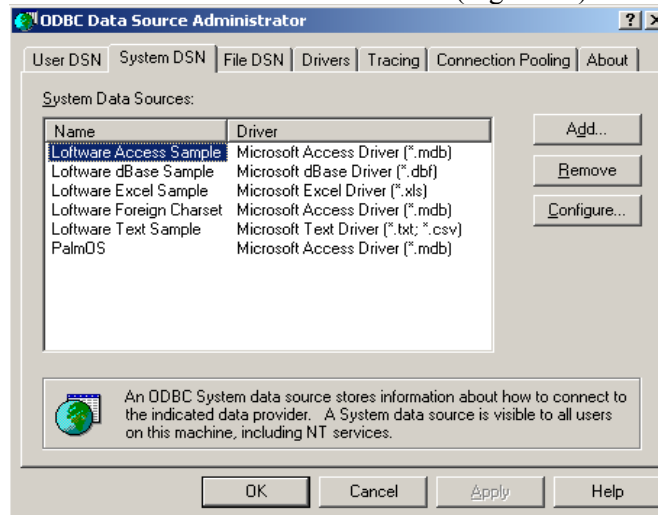


Figure 74

Step 6 – Select the MICROSOFT ACCESS DRIVER (Figure 75)

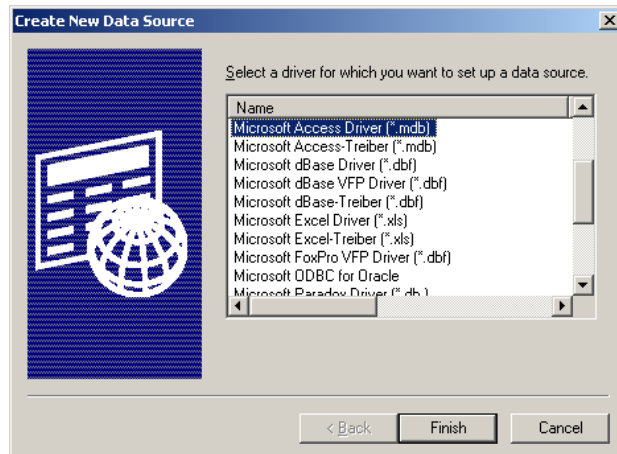


Figure 75

Step 7 – Enter “TrackEm” for the Data Source Name (DSN) in Figure 76 and click SELECT

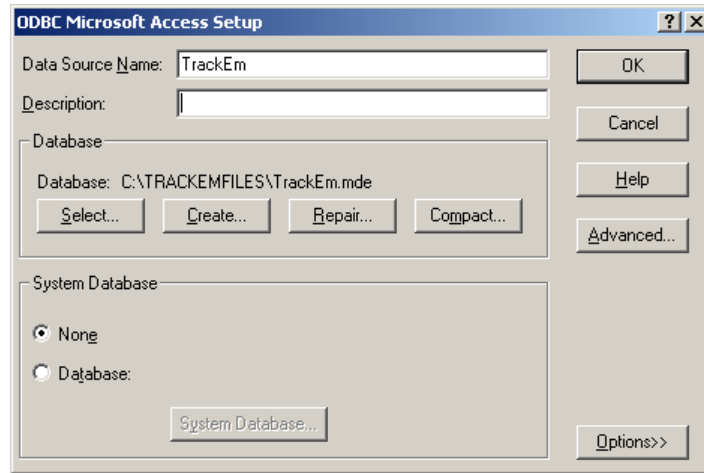


Figure 76

Step 8 – Select TrackEm.mde as shown in Figure 77 and click OK

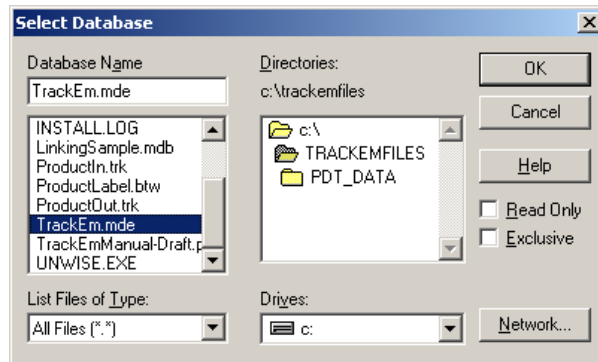


Figure 77

Step 9 – After clicking OK on Figure 76, Figure 78 will appear as shown. Click OK and the ODBC DSN is complete.

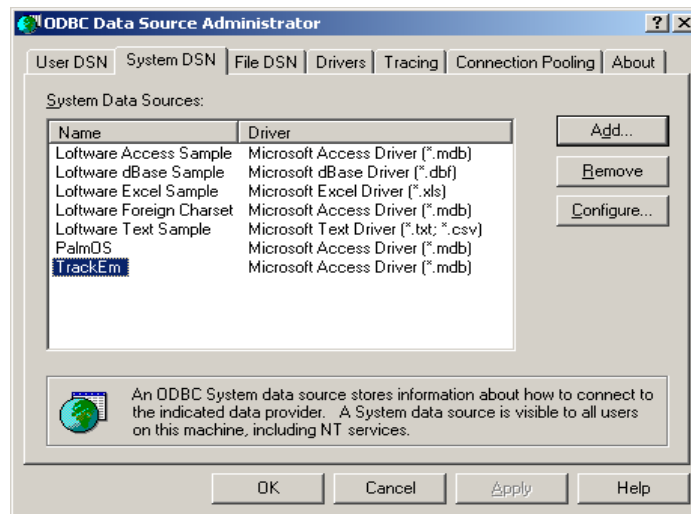


Figure 76

Running Track'Em over a Network

Track'Em can be installed to run on a network so that multiple PC's can share the Track'Em database. Follow these directions in order to setup Track'Em to run on a network.

1. Run the Track'Em setup CD on the network server.
2. Run the Track'Em setup CD on each PC (client) that will be using Track'Em
3. Manually change each client's Track'Em desktop shortcut properties to point to the Track'Em database located on the network server.

Linking to Track'Em from another Database

If you own a licensed copy of Microsoft Access, you can create your own custom reports using the Track'Em data files. You first need to link to the Track'Em tables. The following figures illustrate how to link to the Track'Em tables.

After opening an Access database (new or existing), select FILE | GET EXTERNAL DATA | LINK TABLES as shown in Figure 77.

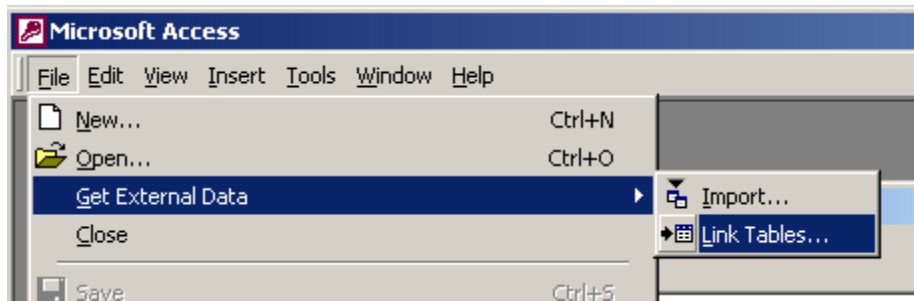


Figure 77

Select the file named TrackEm.mde. The default directory is C:\TrackEmFiles.

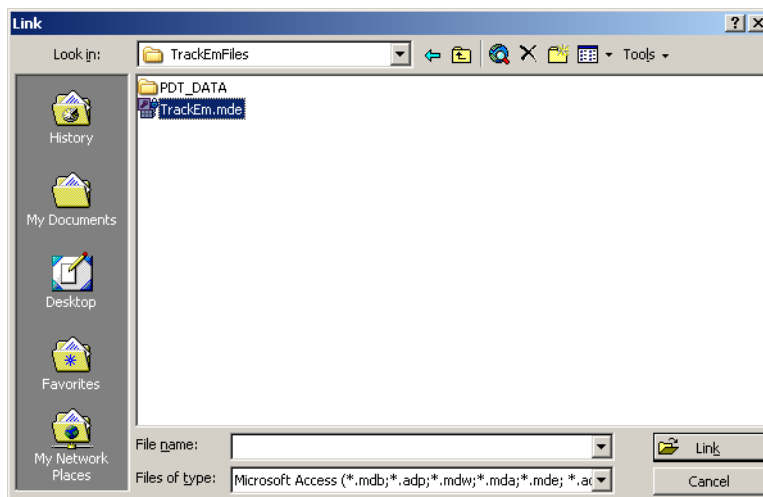


Figure 78

After selecting the database, a list of available tables will be displayed as shown in Figure 79. Select the tables you would like to use in your custom reports.

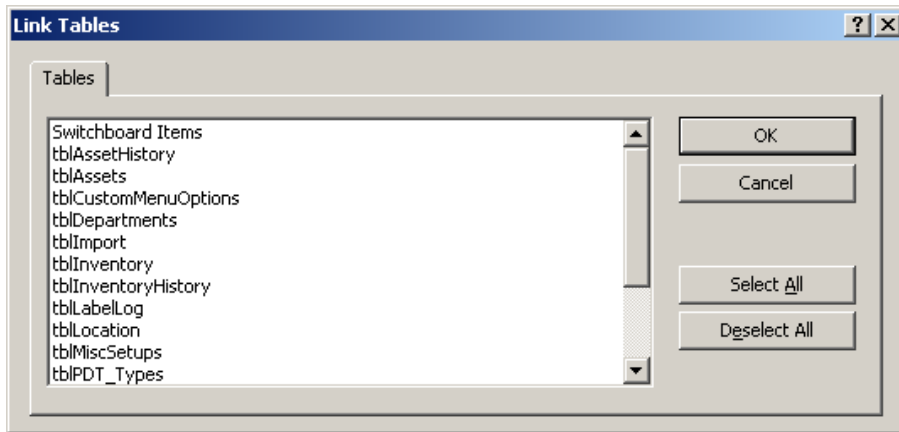


Figure 79

After selecting one or more tables, the Access database screen will appear as shown in Figure 80. You are now able to create your own custom queries, forms and reports using the data in Track'Em.

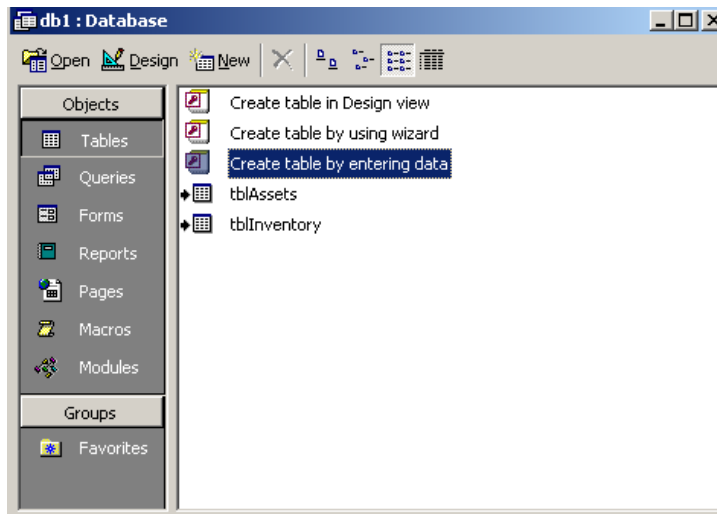


Figure 80

Track'Em Support

Free telephone, fax and e-mail support is provided to all registered user's of Track'Em for 30 days from date of purchase. Additional support is available from RVB Systems Group as follows:

Extended telephone, fax, e-mail support	\$250 / year
On-site installation / training	\$1000 / day plus normal travel expenses
Customization of Track'Em	\$85 / \$125 / hour (off site)/(on site)

Contact RVB Systems Group at:

6952 Wade Dr
Cary, NC 27519
(919) 362-5211 - voice
(919) 362-8755 - fax
sales@barcode-solutions.com