VERSION 1.6.0

gigatrak.

PACKAGE TRACKING SYSTEM USER MANUAL

PTS USER MANUAL

TABLE OF CONENTS

QUICK START OVERVIEW

Now that you have installed PTS, you are ready to begin using the system. This brief Quick Start Overview and the following User's Manual provide the general information needed to begin entering data into the system and to using PTS for the first time.

EMPLOYEES

The system allows you to create users in PTS. A user may be an individual that will be using the PTS system or those who will be handling packages. Employees will need a badge number, first name, and last name. On the main menu bar, select "Employees". See Employees Administration in this Manual for more information.

LOCATIONS

This function allows the user to create locations to which the packages/deliveries will go. Locations will need an ID number and a location name. On the menu bar, select "Locations". See the Locations Administration in this Manual for more information.

ACTIONS

This function allows the user to make four various actions that mimic those available on the handheld. The four activities available on the PC application are Receive, Container, Transfer, and Deliver. On the menu bar, select "Actions". See Actions Administration in this Manual for more information.

PRINTER ASSIGNMENT

This function allows users to specify which Windows printer will be used for report printing and which one will be used for label printing. This function must be set on each workstation before printing. On the menu bar, select Admin→Printer Assignment. See Printer Assignment Administration in this Manual for more information.

LABEL DESIGNER

The system allows users to design labels for containers, employees, locations, and packages. These labels typically have barcodes and can be used to move packages and containers. Several sample label designs are included and can be modified. You must select a default label design before printing is allowed. On the menu bar, select Admin→Label Designer. See Label Designer in this Manual for more information.

REPORTS

This function allows users to run, print, and e-mail or save various reports with different filters that allow for selecting useful information on various subjects. On the menu bar, select "Reports". See Reports in this Manual for more information.
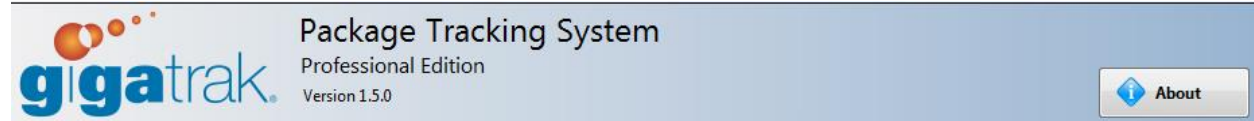

Once you have set up your initial data, you are ready to start using PTS. Be diligent on how you use the system, and it will provide years of reliable tracking for all of your packages!

Backup your database daily!

GETTING STARTED

ABOUT

After opening the PC application, select "About" button on the upper right side of the screen.


CHANGE DATABASE

To change the database being used, select About→Change Database. Choose the type of database you will be using with the drop down menu at the top. You will then be prompted to list the server name and database name if using an SQL Database or the location if using an Access Database. When entering the SQL Server Name or IP Address, if you are using a named instance, add it with a backslash (example: myserver2\SQLExpress).
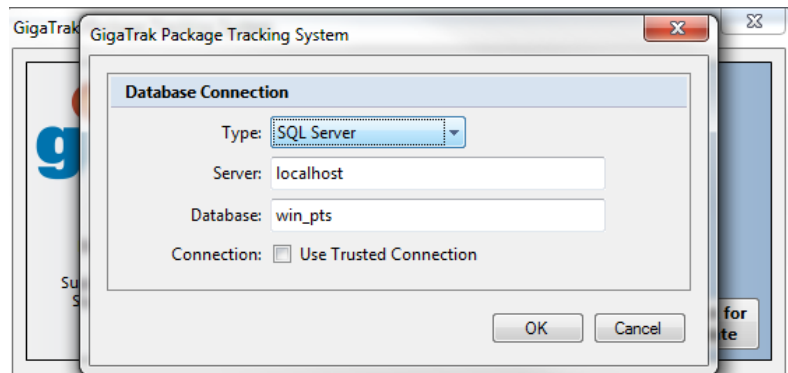
CHANGE REGISTRATION

To change the registration on the PTS application, select About→Change Registration.

This step is important because it assigns licensing rights for you. Entering the information will unlock the program for your licensed use. The Four Digit Customer Identifier and the 16 Digit License Key will be provided by GigaTrak when the product is purchased.
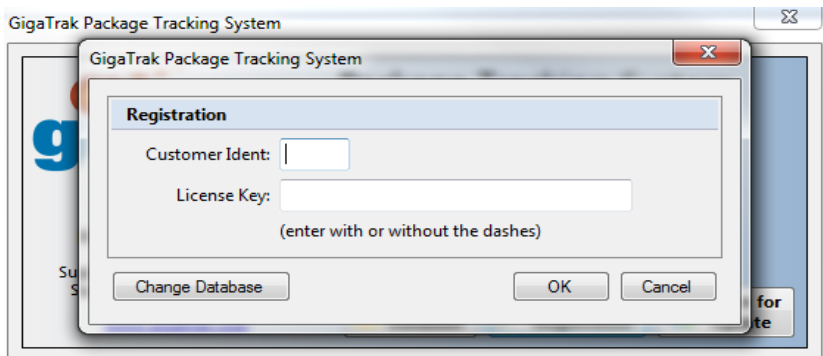
CHECK FOR UPDATE

To check for updates on the PTS application, select About➔Check for Update. The system will connect to a GigaTrak server to search for an update to the system. If an update is available, the system will begin the download process. Major updates may require you to contact GigaTrak and receive a special download. **You must have a current Support Agreement in place in order to download updates.**

ADMIN

HANDHELD CONFIGURATION

The Handheld Configuration screen is where PTS installs the handheld setup for the appropriate handheld device as well as sync the handheld when using the batch version of the handheld application.

To install PTS to a handheld, follow the steps below:

1. Connect Handheld to the PC via Active Sync or Windows Mobile Device Center
   a. If handheld is not connecting through Active Sync or Windows Mobile Device Center or Active Sync or Windows Mobile Device Center is not installed, please see Communication With Host PC.
2. Select Handheld Device
3. Select Install Handheld Application
4. If using the handheld batch version, see Sync by Batch under PTS Mobile Handheld Application
5. If using wireless, see Admin/Wireless Setup under PTS Mobile Handheld Application

See PTS Mobile Handheld Application in this Manual for more information about handheld devices and features.

LABEL DESIGNER

The Label Designer allows you to format a label for Employees, Containers, Locations, and Packages. Any number of designs can be created, but only one can be the "Default Label Design" for each type. To access the label designer, click Admin➔Label Designer.

LABEL DESIGNS

The Label Designs tab of the Label Designer is made for viewing, adding, deleting and saving label designs for different label types.

Label Type/Design

Select the Type of label you wish to view by using the drop down menu. Select which of those designs you would like to view select the design below or click new to add a new design of that type. Select Save to save changes to that design. Use save as to save a copy of the current design under a different name. To delete the current design, click the delete button. The current default label with be bolded. If no label design is bolded for that label type, please select a default label for that type. Please see Label Functions for instructions on setting a default label design.

Label/Page Options

Use this to set the size and orientation of the label. If printing multiple labels on one page select the Print Multiple Labels per Page and the Page Options tab will be unlocked. In Page option you can change the spacing between labels as well as how many columns of rows you would like to print.

Label Functions

The Label Functions hold two key buttons: Set As Default Label Design and Print Current Label Design. Set As Default Label Design will set the current selected design as the default for that type of label. So if a label is printed for that type it will be printing based on that design. Print Current Label Design will print a sample label so that you can see what the label will look like.
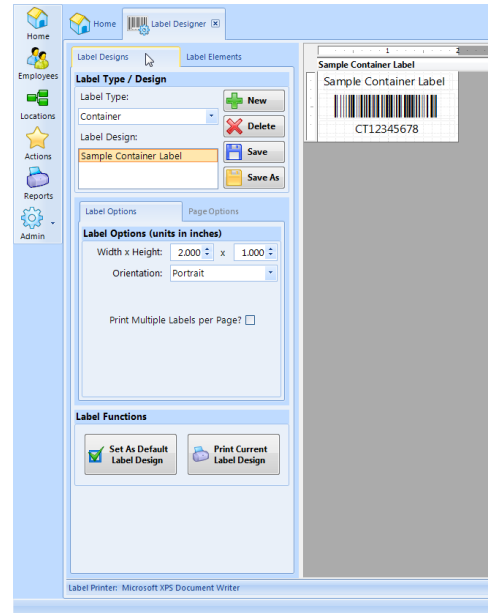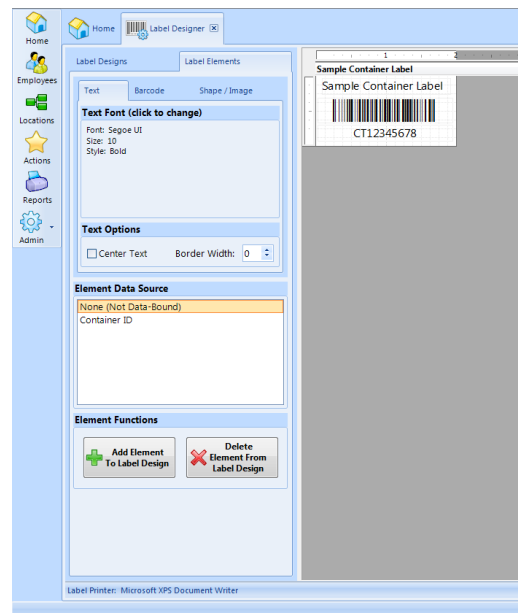
LABEL ELEMENTS

The Label Elements tab of the Label Designer is made for add, editing and removing elements of a label.

Text

Select the Text tab in the Label Elements panel. Select the type of text you would like to use in the Data Source box, press Add Element To Label design and type a label caption in the Value Required textbox if using a data source marked (Not Data-Bound).

Right clicking on a text element will give you some extra options to apply to that element. You can change the size, center the text in its bounding box, edit the text if using a data source marked (Not Data-Bound), add a border around the bounding box or change the color.

Barcode

Select the Barcode tab in the Label Elements panel. Select the type of barcode you would like using the drop down menu called Type. Select the type of text you would like to see as a barcode in the Data Source box, press Add Element To Label design and type a label caption in the Value Required textbox if using a data source marked (Not Data-Bound).

Right clicking on a barcode element will give you some extra options to apply to that element. You can change the size, center the barcode in its bounding box, edit the text of the barcode if using a data source marked (Not Data-Bound), add a border around the bounding box or change the color.

Delete Element From Label Design

Select the element of the barcode you wish to remove and click the Delete Element From Label Design button and it will be removed from the current label design.

Shape/Image

Select the Shape/Image tab in the Label Elements panel. Select the type of Shape/Image you would like and press Add Element To Label design.

Right clicking on a Shape/Image element will give you some extra options to apply to that element. You can change the size, center the element in its bounding box, add a border around the bounding box/ change the thickness of the line or change the color.

For images, when you click the Add Element To Label Button and have the (Not Data-Bound) selected. You will be prompted to select the photo file from your computer. File formats accepted are .bmp, .gif, .jpg, .png and .tif.
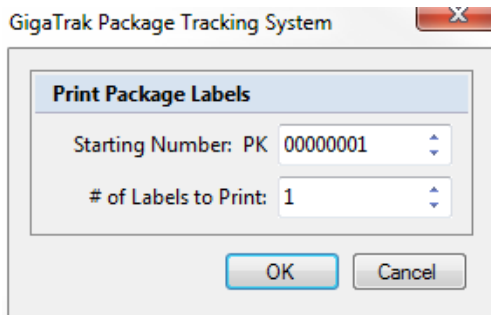
PRINT CONTAINER LABELS
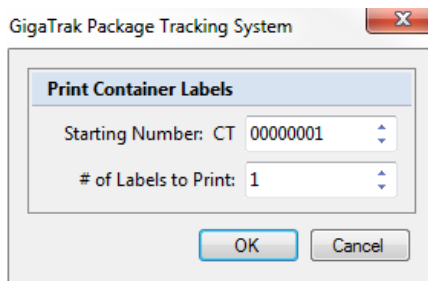
This function allows users to print off a sequence of several container labels all at once. To access this function, select Admin→Print Container Label.

Enter the number of the 1st container label you would like printed, followed by the total number of labels you'd like printed. This will print off a large sequence of container labels using the default label for a container as selected in the Label Designer.

PRINT PACKAGE LABELS

This function allows users to print off a sequence of several package labels all at once. To access this function, select Admin→Print Package Label.

Enter the number of the 1st package label you would like printed, followed by the total number of labels you'd like printed. This will print off a large sequence of package labels using the default label for a package as selected in the Label Designer.

PRINTER ASSIGNMENT

The printer assignment process is used to set the printer that the system will use for printing reports and barcode labels. Select Printer Assignment from the Admin menu and the screen below will be displayed.

The available printers list will display all the printers that are on the Windows printer list.

To select the report printer, select the printer of choice and then select "Assign Default Printer" button. The default printer label will indicate the printer you selected. Any reports printed by the system will be directed to this printer.

To select the label printer, select the printer of choice and then select the "Assign Label Printer" button. The label printer will indicate the printer you selected. Any labels printed by the system will be directed to this printer. If you do not have a label printer, assign the label printer to the same printer as the default printer.

This does not affect the Windows default printer selection.
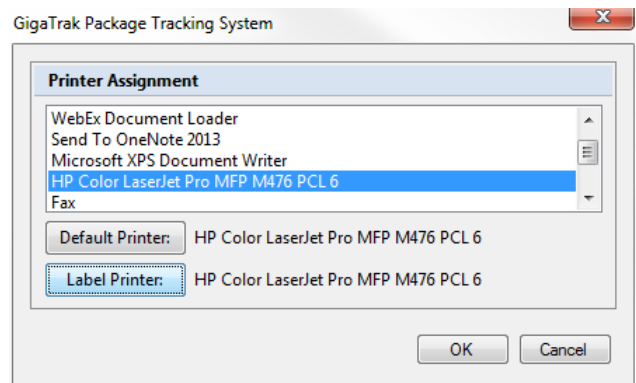
SETTINGS
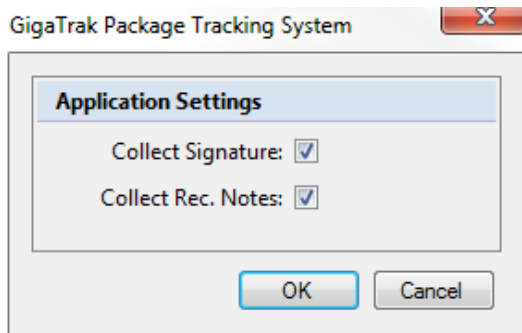
The system allows users to choose whether the collection of signatures and record notes for packages/containers is necessary. Select Admin→Settings to see these options.

Depending on your preference, or the requirements of your organization, select or deselect the "Collect Signature" and "Collect Rec. Notes" checkboxes.

EMPLOYEES SCREEN

The Employees screen allows functions of adding, editing, or deleting employee records. To access this screen, select the "Employees" button on the main menu bar.

To add a new employee, select the Add button and fill in all required fields. You will need to enter in the user's ID/Badge #, First Name, Last Name, and Status. The employee's badge/ID number acts as their barcode that must be entered when tracking a package.
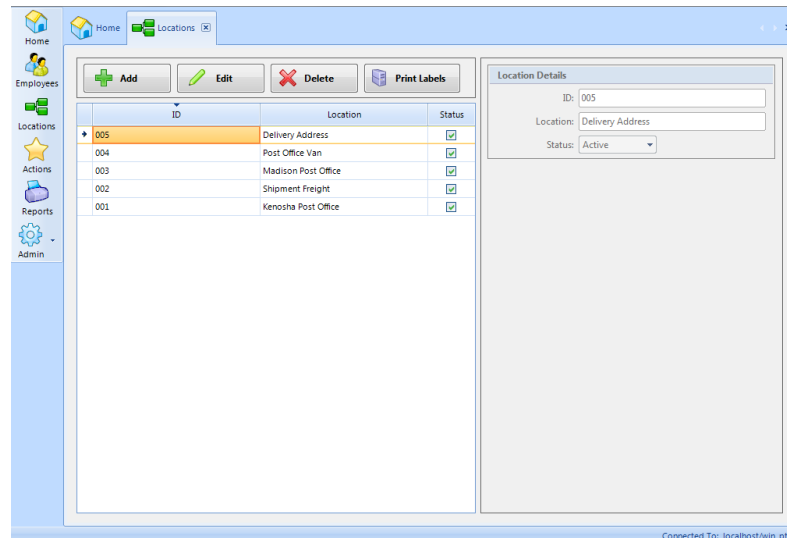
To delete an employee, select the employee and then select the "delete" button. If an employee is involved in a history record, the system will not allow the employee to be deleted. Instead, set the status to "inactive" to prevent further use and to retain the historical data tied to the employee.

A barcode label can be printed for each employee based on the default format setup in the Label Designer.
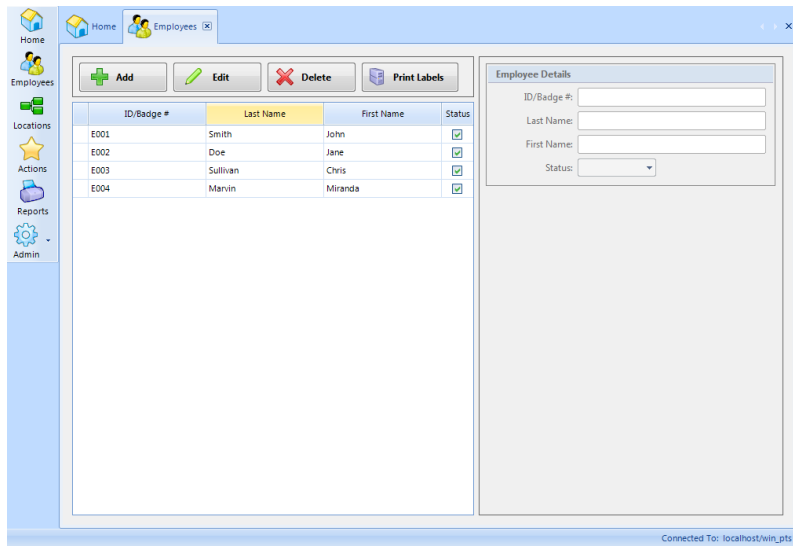
LOCATIONS SCREEN

The Locations screen allows for the creation of locations where the packages will be upon scanning. Locations can be either places where packages are stored or places where packages are delivered. To access this screen, select the "Locations" button on the main menu bar.

To add a new employee, select the Add button and fill in all required fields. You will need to enter an ID, Location Name, and Status. The ID acts as the barcode that is scanned when tracking a package.

To delete a location, select the location and then select the "delete" button. If a location is involved in a history record, the system will not allow the location to be deleted. Instead, set the status to "inactive" to prevent further use and to retain to historical data tied to the employee.

A barcode label can be printed for each location based on the default format setup in the Label Designer.

ACTIONS

The actions screen mimics the features available on the handheld application. Activities available for this function are receive, container, transfer, and deliver. To access this function, select "Actions" on the main menu bar. Then, enter the employee ID that will be recording the information for the package(s).
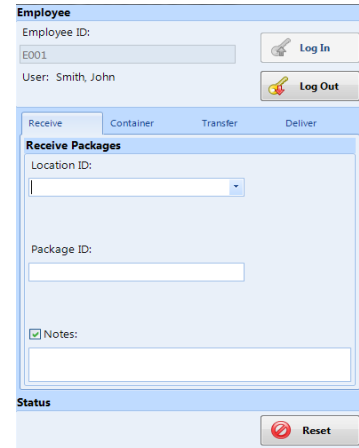
RECEIVE

The first tab is receive. The receive tab is used to scan packages as they are received in a certain location. In recording a received package, first select a location ID to where the package is being received from the drop-down menu.

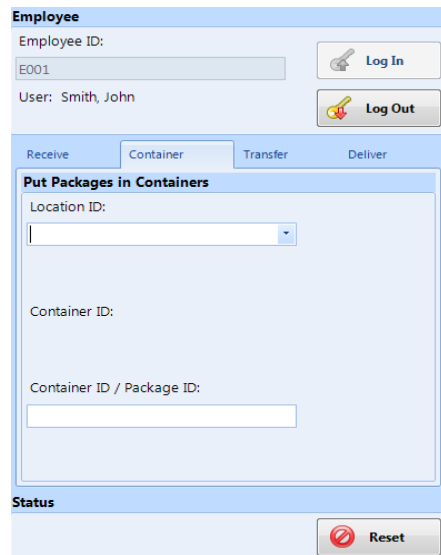Scan or enter the ID of the package that is being received.

Enter in any notes that need to be captured for the package.

Click enter. If the package was successfully received, the status section at the bottom will show "Package received successfully".

To cancel the process at any time, press the "reset" button in the bottom right corner and no information will be saved for that record.

CONTAINER

The second tab is container. The container tab is used to scan multiple packages and put them into containers. First, select the location ID from the drop-down menu. Select the location ID of which the movement of packages to containers is taking place.

Scan or enter the container ID of the container in which the packages will be placed. The container ID will start with CT_____.

Scan or enter the Package IDs to be put into the selected container.

Click enter when finished scanning packages or containers. If the package was successfully put into a container, the status section at the bottom will show "Packages in containers successfully".

To cancel the process at any time, press the "reset" button in the bottom right corner and no information will be saved for that record.

TRANSFER

The third tab is transfer. The transfer tab is used to scan packages as they are transferred from one location to another. In recording a transferred package or container, first select the ID of the location that the package is being transferred to.

Scan or enter the package ID/container ID of the item that is being transferred.

Click enter. If the item was successfully transferred, the status section at the bottom will show "Package transferred successfully".

To cancel the process at any time, press the "reset" button in the bottom right corner and no information will be saved for this record.

DELIVER

The fourth tab is deliver. In recording a delivered package or container, first select the ID of the location where the item was delivered from the drop-down menu.

Scan or enter the package ID/container ID of the item being delivered.

Click enter. If the item was successfully delivered, the status section at the bottom will show "Package delivered successfully".

To cancel the process at any time, press the "reset" button in the bottom right corner and no information will be saved for this record

REPORTS

The Reports screen allows users to filter package records based on several criteria. To access reports, select "Reports" on the main menu bar.

Records can be filtered with the following criteria:

- Employee
- Location
- Container ID
- Package ID
- Status (Received, Transferred, Containered, Delivered)
- Date Range
- Sync Date Range
- Notes
- Signature

When the report is viewed, the data will be presented. The data can be sorted by any of the columns in the table below by clicking on the header of the column. When the filters are set as desired, the user can then select the Print button on the upper right-hand side of the screen. A print preview screen will be generated. All reports can then be printed, e-mailed, or saved to a file location.

PTS MOBILE HANDHELD APPLICATION

BATCH VS. WIRELESS HANDHELDS

Batch handheld units hold data in a mobile database file that gets transferred back and forth between the handheld and the host PC. These units will work with both Microsoft Access and Microsoft SQL Server host databases. The handheld must be docked with the host PC to perform the transfer. The tool data on the handheld is a snapshot of the data on the host PC. If there are multiple users changing data on the host database, the handheld data may be outdated in a short period of time. Therefore, it is important to synchronize the handheld with the host PC often, so that it has current information.

Wireless handheld units communicate with the host database in real time. This requires the host database to be Microsoft SQL Server. Your facility will have to have a wireless infrastructure in place for communication. No data is stored on the handheld.

COMMUNICATION WITH HOST PC

Communication software must be installed on the host computer. Choose the correct software based on the operating system of the host computer.

MICROSOFT ACTIVE SYNC INSTALLATION (FOR WINDOWS XP)

1) Locate a copy of the latest version of Active Sync for your computer system. The correct version is available from Microsoft's WEB site. Version 4.5 is the latest from Microsoft as of this printing.
2) Look for the installation file (i.e. activesync_setup.msi) and run it. We recommend that you follow the installation instructions and accept the standard default settings during your install.
3) Leave Active Sync running to install and connect your handheld computer.

NOTE: Some users may use a single PC to connect multiple handheld computers. If this is the case, it is best to setup your PC to recognize each handheld as a "Guest". This avoids having Active Sync loading shared data from your Outlook and other PC applications. To set all connected handhelds as a Guest, please double-click and run the provided "GuestOnly.reg" file. It will instantly update your system for future connections.

WINDOWS MOBILE DEVICE CENTER INSTALLATION (FOR WINDOWS VISTA OR NEWER)

1) Locate a copy of the latest version of Windows Mobile Device Center for your computer system. The correct version is available from Microsoft's WEB site.
2) Look for the installation file (i.e. drvupdate-x86.exe) and run it. We recommend that you follow the installation instructions and accept the standard default settings during your install.

ADMIN/WIRELESS SETUP

Once the app is installed, to use it wirelessly, there is one more step to installing.
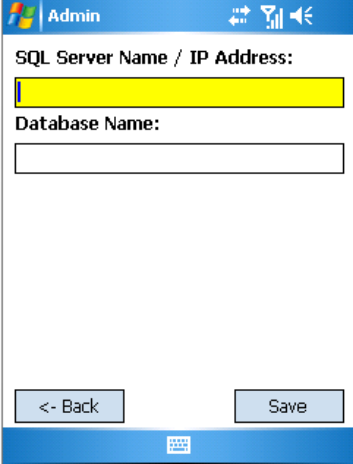
The admin function will unlock information to connect your handheld to the database wirelessly. To use the wireless part of the app, you must be using an SQL database, and the handheld must be used on the same network as the SQL Server.

To access the admin function, select "admin" on the main menu. The application will prompt you for a password which is: gigapkgs
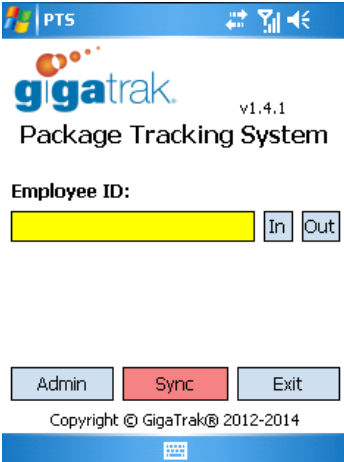
The screen will then prompt users for a SQL Server Name/IP Address and a Database Name. By entering this information, the handheld will be able to connect to the correct database.

Click "save" to store the information and exit the Admin screen.

Then Sync the handheld wirelessly. For instructions see Sync Wirelessly.

HANDHELD APPLICATION LOGIN

When the handheld application is first started, a user login will be required. Scan an employee barcode or type in an employee barcode and then press the "enter" key. If the barcode matches an employee in the data file, the employee name will appear under the scan box, and buttons for the application functions will appear.

The user barcode is tied to the records that are recorded by the handheld. If a different employee uses the handheld, he/she should enter their barcode before recording records. To change the user barcode, select the "out" button and enter in a different employee barcode to log in again.
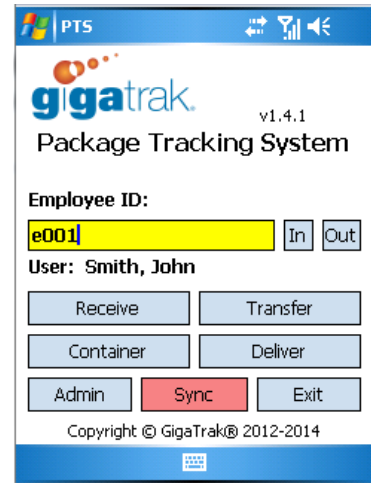
HANDHELD APPLICATION FUNCTIONS

Upon signing in with a valid employee ID, the additional functions on the handheld application are unlocked.

Mimicking the PC application, the functions on the handheld application include four main activities: receive, transfer, container, and deliver.
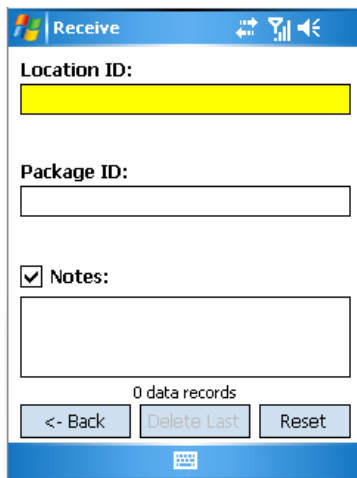
Select which activity you wish to complete by clicking on its respective button.

To logout of the system, select the "out" button in the top right corner. To close the application altogether, select the "exit" button in the bottom right corner.

RECEIVE

This function allows the user to utilize the handheld to recieve a package.

First, the handheld application prompts the user to scan/enter the ID of the location that is receiving the package. Then, scan the ID of the package that is being received.

In the notes field, enter in any notes that need to be captured for the package.

Hit the "enter" button. If the package was successfully received, the notes textbox will be replaced with a "Package received successfully" message in green.

To cancel the process at any time, select the "reset" button in the bottom right corner.

TRANSFER

This function allows the user to utilize the handheld application to transfer a package/container.

In recording a transfer, first select the ID of the location that the package is being transferred to.
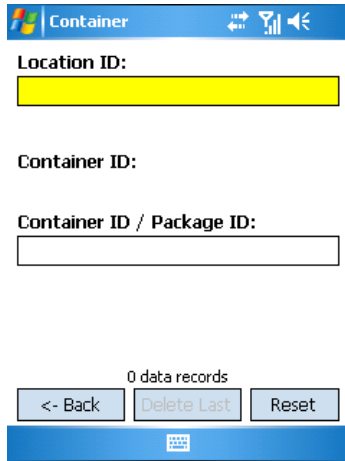
Scan or enter the barcode of the package/container that is being transferred.

Hit the "enter" button. If the package was successfully transferred, the screen will flash a "Package transferred successfully" message in green.

To cancel the process at any time, select the "reset" button in the bottom right corner.
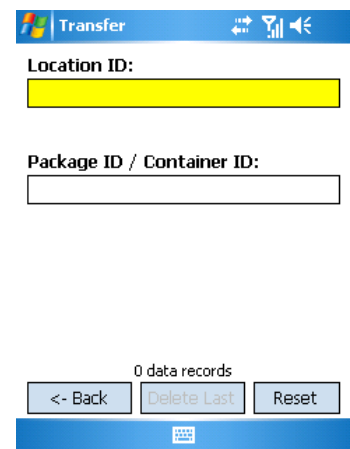
CONTAINER

The container function is used to scan multiple packages and put them into containers.

Scan or enter the location ID of where the packages are being put into containers.

Scan or enter the ID of the container in which the packages will be placed. The container ID will start with CT_____. Upon the successful scan of a container ID, a green message will state that the container record was saved successfully.

Scan or enter the package IDs of the packages that will be put into the container. A green message will state that the "Package was containered successfully".

To undo a containered item, select the "delete last" button on the bottom of the screen. To cancel the current process at any time, press the "reset" button in the bottom right corner.

DELIVER

This function allows the user to utilize the handheld application to perform package/container deliveries.

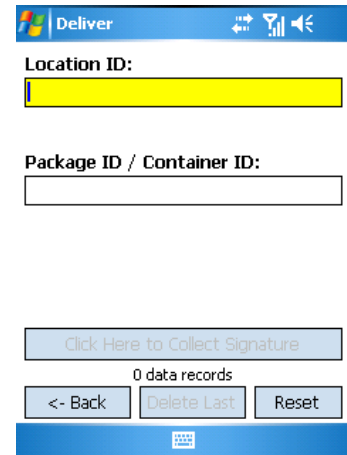In recording a delivery, first select the location ID where the item is being delivered.

Scan or enter the package ID of the item that was delivered to the location.

Hit the "enter" button. If the item was successfully delivered, the screen will flash a "Package delivered successfully" message in green.

If under the settings you opted to collect signatures upon delivery, there will be an additional button saying "click here to collect signature".

Upon clicking this button, the screen will prompt for a signature and name. After signing, click the "enter" button and a message will flash stating that the Signature was accepted successfully. Hitting the "back" button will return the screen to the deliver function.

To cancel the process at any time, select the "reset" button in the bottom right corner.

SYNC BY BATCH

If not using the wireless function of the handheld, you will need to sync the handheld directly to a pc.

To Sync:

1. Connect Handheld to the PC via Active Sync or Windows Mobile Device Center

2. Select Handheld Device
3. Make sure the PTS application is not open on the handheld.
4. Select Sync Handheld Database on the pc.
5. A prompt asking "Ready to sync the connected handheld?" will appear, select OK
6. The handheld with then sync with the pc and prompt "Sync Complete" when finished.
7. Click OK on the Sync Complete prompt and the pc and handheld will now be up to date. If you have any other handhelds, it is best to sync then all around the same time to make sure they are all up to date.

SYNC WIRELESSLY

The sync function allows the handheld application synced wirelessly with the database. If the sync button is red, the function has errors and will not work properly. Ensure that the device is connected via SQL Server/IP Address and Database Name. Please see Admin/Wireless Setup for more information. If the sync button is green, there are records that have not be synced with the database yet.   If the sync button is gray, there are currently no records that need to be synced with the database and the connection to the database is working correctly.

To Sync:

1. Press the Sync button.
2. The screen will prompt you to select "Sync Now", which will update the records on both the handheld and PC applications. Press the Sync Now button
3. If the handheld syncs properly, a green message saying "Sync completed successfully." Will appear. Press Back to return to the handheld program.

SUPPORT

GigaTrak provides 90-days of telephone support for PTS from the date of purchase. GigaTrak will advise on installation issues but the customer is responsible for network and SQL Server installation. Our hours are 9am to 5pm central time Monday through Friday. During this time you are entitled to any updates or new releases issued by GigaTrak. By purchasing an extended support one, two or three year agreement, these services are extended. Onsite support is available at additional cost. Please call 262-657-5500 extension 2 with any questions.