TRACER Version1.3

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Version 1.3 User Manual

Chapter 1: Introduction

1.1   Introduction

PTS is proud to introduce Tracer v1.3. Tracer v1.3 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 Palm OS devices and Symbol bar code enabled terminals including Symbol's SPT series, and the Visor compatible CSM-150 module. 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 for Tracer 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. For most installations, the automatic install is sufficient. In certain scenarios, the automatic installation may not work and a manual installation is necessary**.**

2.1   Automatic Installation

1. Download **Tracer.exe** from www.ptshome.com or another authorized reseller.

2. Double click **Tracer.exe** to run the installation.

3. Follow the steps as directed.

4. Once completed, you will be prompted to run PTS PDA Installer. This is the final step in the installation process and is normally required.

5. The PTS PDA Installer application installs both the PDA Application as well as the PC conduit used for the data transfer. Follow the remaining steps and the software installation is complete.

6. Perform a **HotSync** with your Palm Pilot. At this point, you should see the Tracer application installed on your Palm Pilot.

2.2   Removing Tracer

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

Run the PDA Installer application from Start→Programs→PTS→Tracer 1.3→PDA Installer. Select Remove Tracer 1.3. Once this process is completed, finish the uninstallation by clicking the Remove button for PTS Tracer 1.3from Start→Settings→Control Panel→Add/Remove Programs. This process removes the conduit from the **HotSync** process but the Tracer application must be manually removed from the PDA

Chapter 3: System Operation

Chapter 3 details the operation of the Tracer System. 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.***
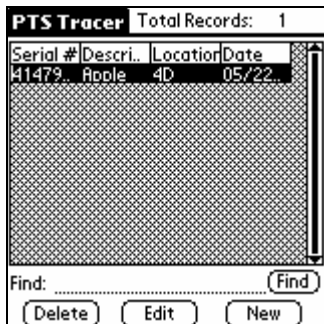
3.1   PDA Operation

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

3.1.3   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 PDA's Menu button while 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.

```
┌─────────────────────────────┐
│ Tracer Field Settings       │
│ ┌─────┐                      │
│ │Field 1│ Name: Field1       │
│ │Field 2│ Default Value:     │
│ │Field 3│                    │
│ │Field 4│                    │
│ └─────┘                      │
│ ┌─────────────────────────┐ │
│ │       After Scan        │ │
│ │ Go To:  ▼ Field 2       │ │
│ │ □ Auto Submit ☑ Clear on Submit│
│ └─────────────────────────┘ │
│                             │
│ ( Done )                    │
└─────────────────────────────┘
```

Name (Ref. B)
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 (Ref. C)
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 permitted 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 PDA User name 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 (Ref. D)
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 (Ref. E)
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 (Ref. F)
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 (Ref. G)
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 setup. 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.
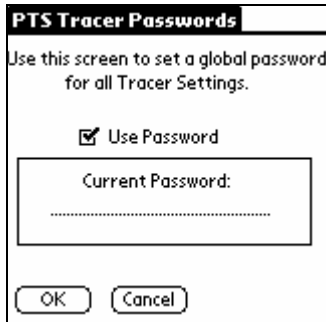

3.2   HotSync to PC Operation

Data captured from the PDA is transmitted to the PC upon every HotSync. This data contains all the information captured for the four fields on the PDA application. The data is transferred and is located in the Tracer subdirectory of the particular Palm User performing the HotSync. For example, if your PDA name is set to John Smith, Tracer data would be located in a folder called c:\palm\smithj\Tracer. 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 HotSync**. This option is accessible form the **Admin -->HotSync** Settings menu.

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

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 **Hot Sync 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 entered on the PDA and transferred to the PC to five and the number of sessions to three. 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 Palm User ID and an Email address. We generate a unique serial number to your Palm User ID so it is important that you send the ID Exactly as it appears on the Tracer Splash Screen.

This user ID can be found in the HotSync application of your Palm Pilot in the upper right-hand corner of the screen. It can also be found in the Tracer Splash Screen.

1. Open the Registration info link included with your installation. This is located at
Start→Programs→PTS→Tracer 1.3→Registration Info.
2. Enter the information for your order including your PDA Device Name.
3. Click on the **Submit** button.
4. Once you submit this information, your registration code will be emailed to the provided
    address.

4.2   Entering your 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   Tracer 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. Please allow us 24 hours to respond although it is often much faster.