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Chapter 1: Installation and setup

Tigerpaw Barcode works as a three-tiered system. This means that there is a server (SQL or MSDE Server) hosting the Tigerpaw database; an intermediary desktop PC running both Tigerpaw CRM+, and the Tigertrak Barcode software which will be used to convert and transfer the data; and the barcode enabled Symbol hand-held device. The prerequisites for using Tigertrak Barcode are to have to have Tigerpaw CRM+ working with some inventory in the system.

1.1 Desktop Setup

First, an end-user's computer must be setup properly for the use of Tigertrak Barcode. The following steps must be taken:

1.1.1 Install ActiveSync

The latest version of ActiveSync can be obtained from Microsoft, or found in the *Extras* folder of the installation disk. After installation, a standard partnership must be established with the Symbol device. An established partnership, and successful synchronization must be completed before proceeding.

Known issues:

- Personal firewalls occasionally prevent ActiveSync from operating correctly.

1.1.2 Install Tigertrak Barcode Desktop

The Tigertrak Barcode desktop installation can be initiated from the autorun menu, or found in the *Desktop* folder of the installation disk. Follow the on-screen instructions to complete installation.

1.2 Symbol Unit Setup

1.2.1 Install Tigertrak Barcode for PPC

The Symbol unit version of Tigertrak Barcode can be installed from the autorun menu, or found in the *PPC* folder of the installation disk. Installation of Tigertrak Barcode for the Symbol unit will require the device to be cradled, and synchronized via ActiveSync. Follow the on-screen instructions to complete installation.

1.2.2 Install Runtime Files

After installing Tigertrak Barcode on the Symbol Unit, some Symbol models may require special runtime files to be installed before operating. If installation of special runtime files is necessary the setup wizard, or program when executed will warn of this requirement. To install the runtime files:

- On the Pocket PC, click *Start > Programs >* and run the *File Explorer*
- Using the drop down box, select *My Device* as shown in Figure 1
- Browse to *Program Files > Tigertrak Barcode >* and run *msvbppc.armv4*

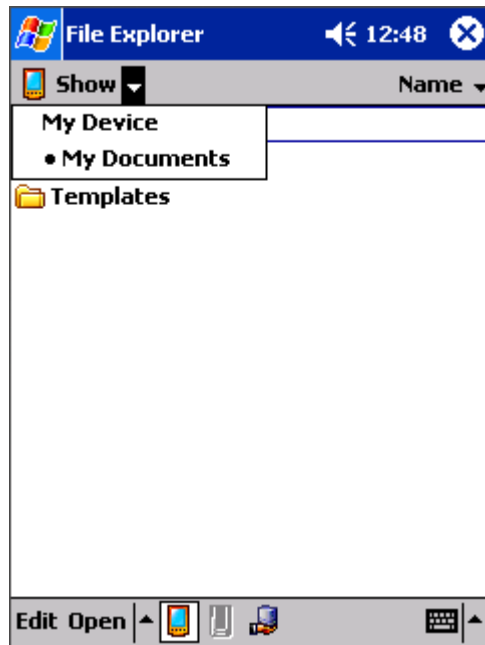


Figure 1: File Explorer

Chapter 2: Program Interface Overview

Currently, Tigertrak Barcode contains two modules which aid in the asset management functions of Tigerpaw's CRM+ Suite: Inventory, and Receiving.

2.1 Desktop Overview

The desktop client is simply the interface between Tigerpaw and the Symbol Unit. its job is to convert, and transfer the data to the PPC device.

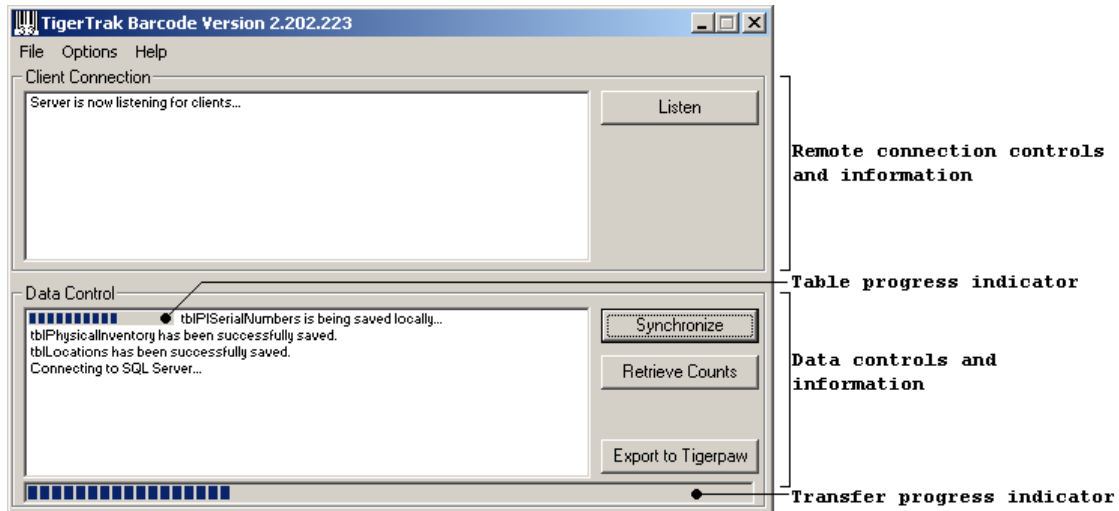


Figure 2: Tigertrak Barcode Desktop interface

Figure 2 is an image of the desktop application interface for Tigertrak Barcode. It is comprised of two main parts as labeled in the figure. The **remote connection controls and information** section is only for viewing data related to the remote connection of the Symbol Unit*. The **data controls and information** section is used to transfer data between the Symbol Unit, and the Tigerpaw database; and to display information related to this transfer.

2.2 Symbol Unit Overview

The Symbol Pocket PC Units main menu is shown below in Figure 3.

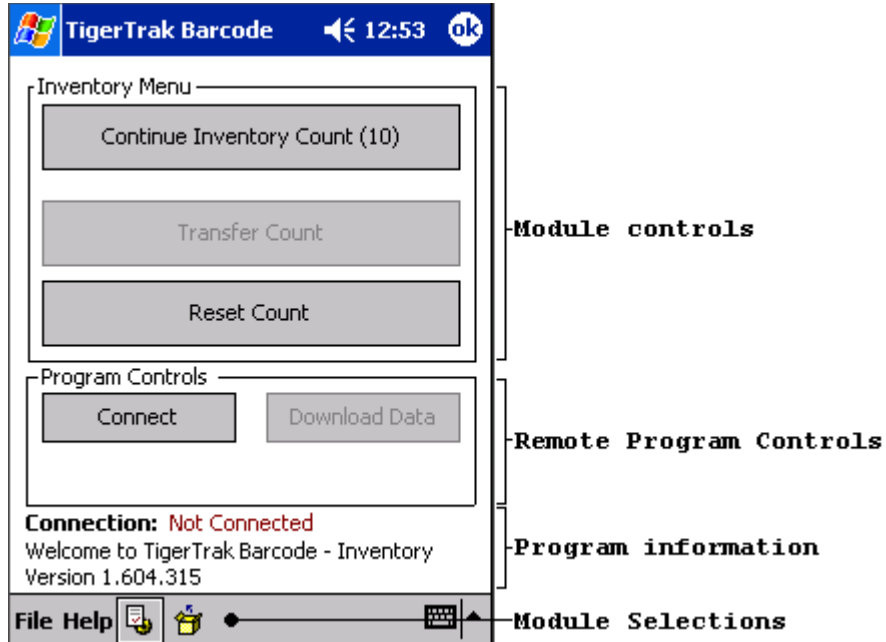


Figure 3: Tigertrak Barcode's Main Menu on the Symbol PPC Unit

Similar to the desktop counterpart, Tigertrak for the Symbol PPC is comprised of two main control portions. The **module controls** where Inventory and Receiving counts will begin, and the **remote program controls***. The **program information** below both control groups is used to relay information about the program. The **Module Selection** located on the menu bar is used to switch between modules.

Chapter 3: Using Tigertrak Barcode

Reiterating the general process, Tigerpaw Barcode works using a three-tiered system. The process for using Tigerpaw Barcode can be summarized by the following 4 steps:

- Step 1: Transfer data from Tigerpaw to the Pocket PC using the intermediary desktop application.
- Step 2: Collect data on the Pocket PC related to the parts inventory.
- Step 3: Retrieve that data from the Pocket PC to the intermediary desktop application.
- Step 4: Import the collected data into Tigerpaw CRM+.

3.1 Step 1: Preparing the PPC for use

In order for Tigertrak Barcode to work properly data related to the Tigerpaw CRM+ inventory must be copied to the Symbol Pocket PC Unit. To prepare the Pocket PC, complete the following:

- First, be sure Tigertrak Barcode is not running on the Symbol Pocket PC. Seat the unit in its cradle and be sure it is synchronized via ActiveSync.
- Next, start Tigertrak Barcode Desktop located in the start menu under the *Tigertrak Barcode* Folder.
- If Tigertrak Barcode has not been operated previously, a database must be selected to connect to. Under the **option** menu, choose **Database Connection** to bring up the database connection wizard. After selecting a database Tigertrak Barcode Desktop will confirm the connection settings were saved.
- If desired, an output file location can be selected. Under the **options** menu, choose **ASCII Filename and Path**. An absolute path must be entered in the text box. By default, the ASCII file will be saved as "*Program Files\Acteon\TigerTrak Barcode\temp.txt*" under the system drive.
- Finally, click the **Synchronize** button under the **Data Control** group. Select a module, any required options, and then continue. As data is copied, its current location, and overall progress will be reported using progress bars, and text display. This process can take several minutes to complete depending on connection speed. It will alert "*Database transfer complete*" when done, and the **Transfer Progress Indicator** will disappear.

3.2 Step 2: Collect Data

Tigertrak Barcode aids in inventory processes by collecting data based on bar coded inventory items, and serial numbers. Each module works in a similar manor, but will be briefly explained in the following sub-sections. Tigertrak Barcode for the PPC can be run by clicking *Start > Programs > Tigertrak >* and running *Tigertrak Barcode*. It should be noted here that Tigertrak Barcode is dependent on the **Scanner Utility**, also found in the Tigertrak start menu program group. This utility must be run prior to operating Tigertrak Barcode, but will stay resident in memory until a restart.

3.2.1 Physical Inventory

Clicking on the **Begin Inventory**, or **Continue Inventory Count** button will start the process by bringing up the Inventory Count main display as shown in figure 4. To begin counting, first select a warehouse location from the drop down menu. Then, if necessary, choose the identifier type from either Item ID, UPC, or Part Number. The default identifier type can be changed in the Module Options found in the File menu of Tigertrak Barcode's Main Menu.

After scanning an item, Tigertrak Barcode will determine if it is serialized, or not. The display will change accordingly as shown in figures 5 and 6. Information about the scanned item will be displayed in the information dialog group box.

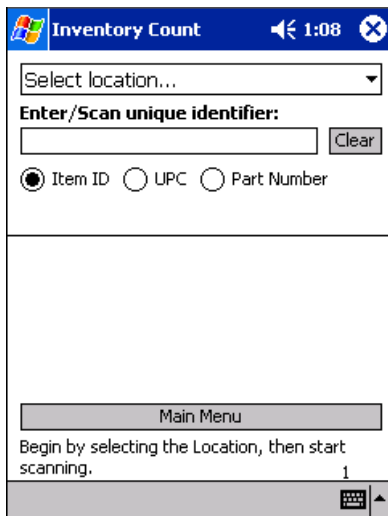


Figure 4: Inventory Count Main Display

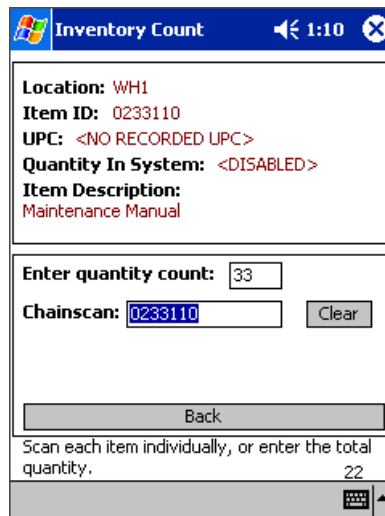


Figure 5: Non-Serialized entry

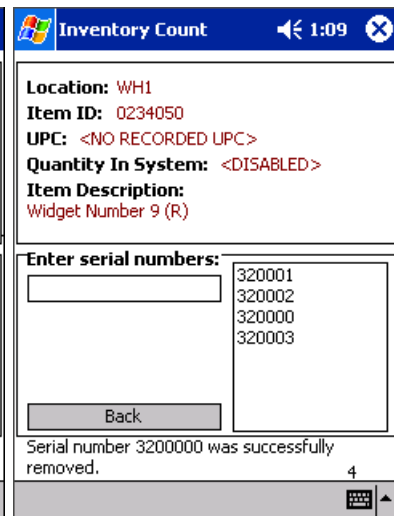


Figure 6: Serialized entry

Non-serialized input is achieved in one of two ways. The first is to use the stylus to tap the quantity count, and enter the quantity using the on-screen keyboard which will automatically appear. The second method is to scan each individual item. This will increment the quantity count by one each time. If a different part is scanned during this process, Tigertrak Barcode will automatically switch to counting that part. To return to the Inventory Count Main Display click the **Back** button.

The serialized input screen has only one way to enter counts for an item. By scanning, or entering the serial number you are counting the item. The serial number inputs will be displayed in the list to the right. If an incorrect serial number is entered, it can be removed by double-tapping it in the list. To return to the Inventory Count Main Display click the **Back** button.

During this process certain error-checks may display a warning, or information. Please read all messages carefully. For example: if after counting an item once in a location you encounter the same item again, Tigertrak Barcode will ask if you if you would like to add to the previous count. There are many of these checks in place to ensure an accurate, and usable count file is created.

3.2.2 Purchase Order Receipts

Purchase Order Receipts can be generated in the Receiving module. This module has three stages to its operation. Like Inventory, Receiving can also be started by clicking the **Begin** or **Continue** button when the Receiving module is selected. This will begin the first stage by displaying a list of all Purchase Orders downloaded to the Symbol Unit. If an item is scanned at this point, Tigertrak Barcode will filter the Purchase Order list to only Purchase Orders that contain the item scanned. After selecting the desired Purchase Order by tapping its entry you will be in the second stage. The top half of the screen will display information about the selected Purchase Order, and the bottom half will contain a list of parts belonging to this Purchase Order. Scanning the part here will automatically bring you to the third stage - count entry. This stage looks and works like the Inventory module's count entry. For non-serialized counts, simply enter the received count using the on-screen keypad. For serialized counts, scan the serial numbers. Extra care must be taken when entering

serial numbers in the Receiving module since it will accept any value entered as a valid received serial number. Clicking the **Back** button at any stage will return you to the previous stage in the sequence.

3.3 Step 3: Retrieving Data to the Desktop

After completing Inventory in a location, or receiving a Purchase Order, the next step will be to retrieve the data back to the desktop.

- Tigerpaw Barcode should not be running on the Symbol Pocket PC Unit.
- The unit should be seated in its cradle and synchronized with the desktop via ActiveSync.
- Run Tigerpaw Barcode on the Desktop, and select **Retrieve Counts**; choose the module you have been creating counts with. The transfer status, and result will be displayed. This process can take several minutes but varies based on the number of counts created.
- The count file will be created where specified as outlined in section 3.1.

3.4 Step 4: Importing Data to Tigerpaw

The final step in using Tigertrak Barcode is return the data gathered by the Symbol Unit to the Tigerpaw database. At the time of this writing, the importation of counts takes place differently between modules.

3.4.1 Importing Inventory Counts

- Open Tigerpaw, and navigate under the *Inventory menu > Physical Inventory > Import Physical Inventory Counts..*
- If you have gone through this process before, you can select a template and hit **OK**; if not, proceed to the next step.
- First browse to, and select the **Barcode Counts File** created in Step 3 (section 3.3).
- The settings, shown in Figure 7, are: **Field Delimiter** should be **Comma**; the **Text Qualifier** should be set to Double Quotes (""); the **Number of fields** is **4**; and **First Row Contains Field Names** must be checked.

- Set the **Field Order** to **Location, ItemID, SerialNumber,** and **Quantity**. At the time of this writing Part Number also appears in the list, and cannot be removed when creating a new template. It should be moved to the bottom of the list.
- Finally, select **Save as New Template**, enter the template name, and click **OK**.
- Tigerpaw will report on imported records, and any encountered errors.
- Review imported data before posting.

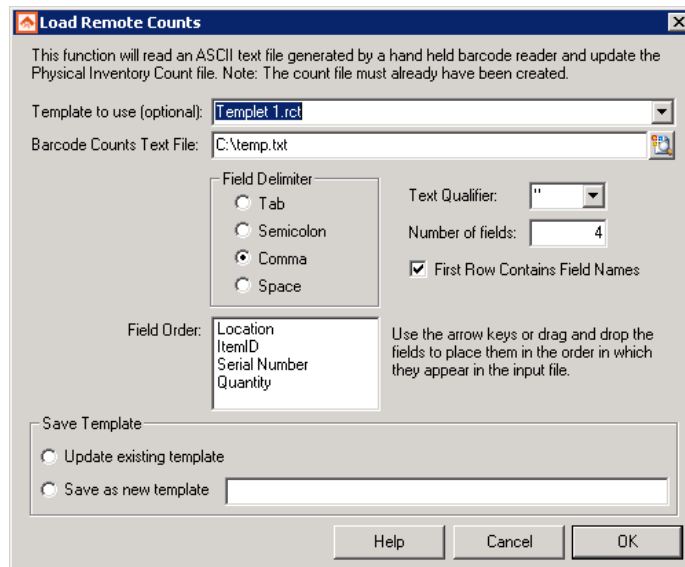


Figure 7: Import Physical Inventory Counts

3.4.2 Importing Receiving Counts

- The importation of a Receiving count is done through the Tigertrak Barcode Desktop application.
- Click **Export to Tigerpaw**.
- Enter login credentials.
- Browse to, and select the **Barcode Counts File** created in Step 3 (section 3.3).
- Tigertrak Barcode will report on the number of imported records, and any encountered errors.
- Review imported data before posting the received counts.

* Unfortunately, at the time of this writing ActiveSync 4.1 does not support remote synchronization, and this feature will not be supported.