

VERSION 1.6.0



# **PTS USER MANUAL**

## CONTENTS

Quick Start Overview .....	3
Employees .....	3
Locations .....	3
Actions.....	3
Printer Assignment.....	3
Label Designer.....	3
Reports .....	3
Getting Started .....	4
About.....	4
Change Database .....	4
Change Registration .....	4
Check for Update .....	4
Admin .....	5
Handheld Configuration.....	5
Label Designer.....	5
Label Designer Setup.....	5
Creating a Label.....	5
Print Container Labels .....	7
Print Package Labels.....	7
Printer Assignment.....	7
Settings.....	8
Employees Screen .....	8
Locations Screen .....	9
Actions Screen.....	9
Receive .....	10
Container.....	10
Transfer .....	11
Deliver .....	11
Reports .....	11
Mobile Handheld Terminal.....	12
admin .....	12

Handheld Application Login .....	12
Handheld Application Functions .....	13
Receive .....	13
Transfer .....	13
Container.....	14
Deliver .....	14
Sync .....	14

## 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 packages will be assigned. Employees will need a badge number, first name, and last name. On the main menu bar, select "Employees". See the employees section 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 section in the manual for more information.

### ACTIONS

This function allows the user to make four (4) various actions that mimic those available on the handheld. Receive, Container, Transfer, and Deliver are activities available on the PC application. On the menu bar, select "Actions". See the actions section in this manual for a more detailed explanation.

### 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.

### 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 the manual for more information.

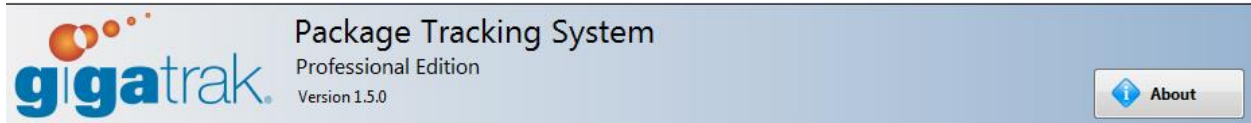
### REPORTS

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

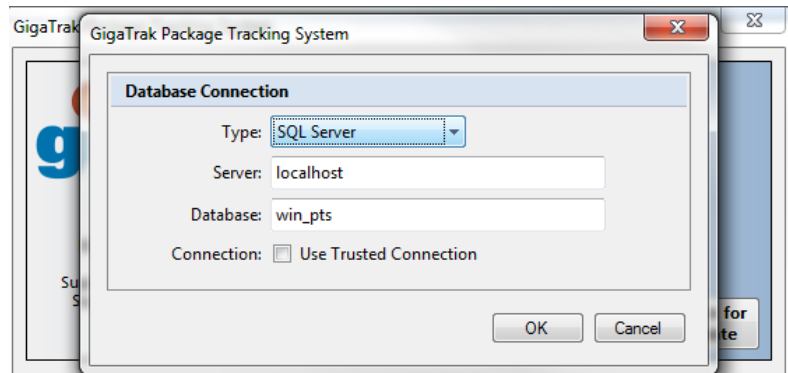
## GETTING STARTED

### ABOUT

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

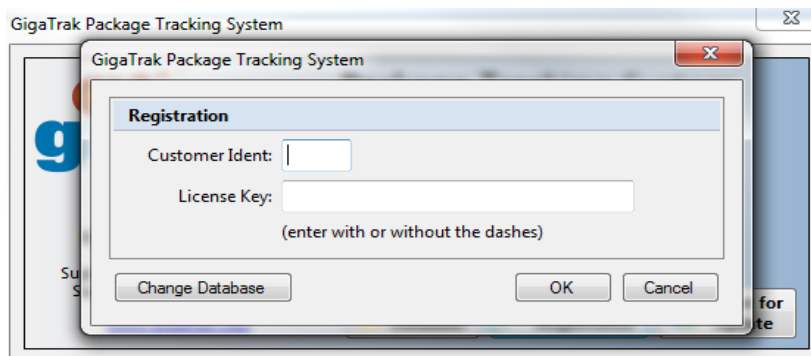


### CHANGE DATABASE



### 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

After opening the program, select “Check for Update” on the About menu. The system connects to a GigaTrak server to search for an update for 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 and receive updates.



## ADMIN

### HANDHELD CONFIGURATION

The Handheld Configuration screen is where PTS installs the handheld setup for the appropriate handheld device. To install PTS setup for a handheld, follow the steps below:

1. Connect Handheld to PC Application
2. Select Handheld Device
3. Install Handheld Application
4. Sync Handheld Database with PC Application

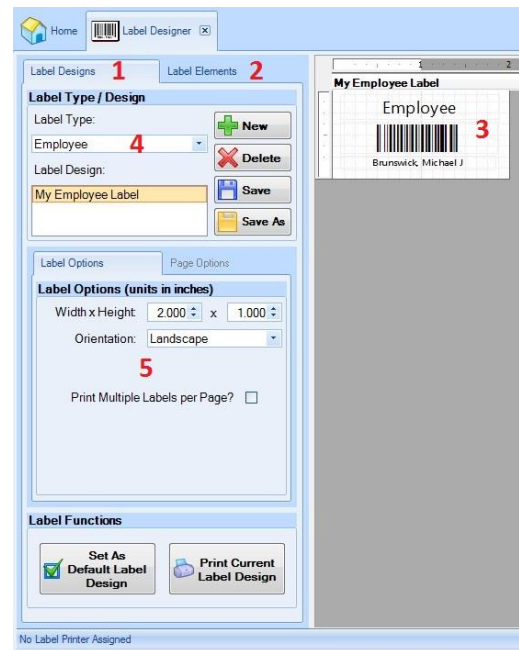
The features on the handheld device will be explained in the Handheld section of this manual.

### 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 DESIGNER SETUP

1. The ‘label designs’ tab brings you to several label and page options.
2. The ‘label elements’ tab gives you a list of text, barcode, and shape/image options for the current label type.
3. On the right-side of the screen, the current label design is shown. When adding elements to the label, they will appear here.
4. Clicking the ‘label type’ drop-down will give you access to container, employee, location, and package labels.
5. The label options box allows you to alter orientation, width, and height. If you check the ‘Print Multiple Labels per Page’ checkbox, you will be able to select the ‘page options’ tab, which gives you settings for multiple label printing.
6. In the ‘label functions’ box, the “default label and print” button will allow you to set the label to default, or print the design.



#### CREATING A LABEL

To actually create a label, first select the label type on the ‘label design’ tab. Once you select a label type, the default label will appear on the right-side of the screen.

After your label type is created, select your width and height, which should match whatever label type you have loaded in your label printer as well as your label printer's preference. If a regular printer is assigned as your label printer, you may have to adjust the margins to get a proper label.

Once label options have been set, click the 'label elements' tab to begin adding elements to your label on the right. There are three tabs (text, barcode, and shape/image). These tabs determine the font that goes onto the label—either font readable with the human eye, or font readable with a barcode scanner.

### Text

#### Text Font (click to change)

Font: Segoe UI  
Size: 8  
Style: Regular

The elements listed in the 'element data source' are elements available to be added to the current label type. Any non-data bound items will prompt a text box, and the text you enter will be added to the label. The 'center' checkbox allows users to center elements

added to the label. In addition, users can add a border with a specified border width. Selecting a data-bound element will add the item to the label. For example, if the element data source 'location barcode' is added to the label, it will show the actual label text upon printing, since the text tab was selected.

### Barcode

Selecting the barcode tab and adding elements to the label design will add elements readable by barcode-scanners to the design. The type of barcode and size can be selected and changed before adding the barcode to the label.

**Barcode Type / Size**

Type:  
Code128A (1D, Alphanumeric)

Size:  
16

### Shape/Image

#### Shape / Image Type

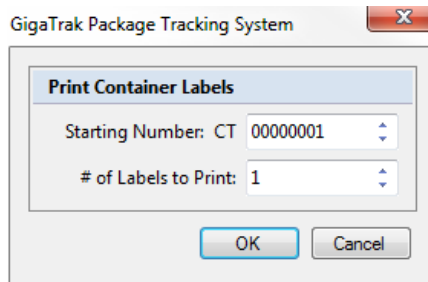
- ☒ Square / Rectangle
- ☐ Horizontal Line
- ☐ Vertical Line
- ☐ Image

The system allows users to add various shapes/images to a label design. Select an element from the list (square/rectangle, vertical line, horizontal line, or image) and then click the "add to label" button to add it on the label design.

Once you are done adding elements to the label, click on the 'label designs' tab and then click on the "set as default label design" button in the label functions section at the bottom. Then, select the "save" or "save as" button to save your label design.

To print a label for an employee or location, go to their respective tabs and select the "print labels" button at the top of the screen. To print a label for a container or package, on the menu bar, select Admin→Print (package/container) Labels.

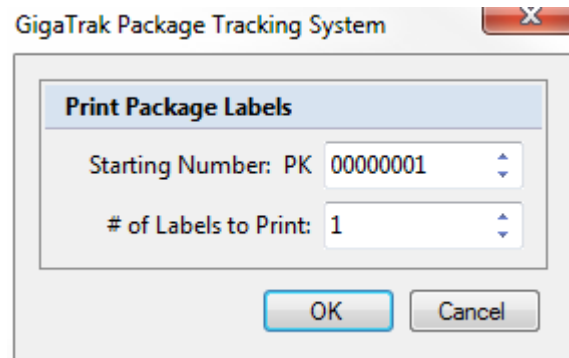
## PRINT CONTAINER LABELS



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 1<sup>st</sup> 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.

## 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 1<sup>st</sup> 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.

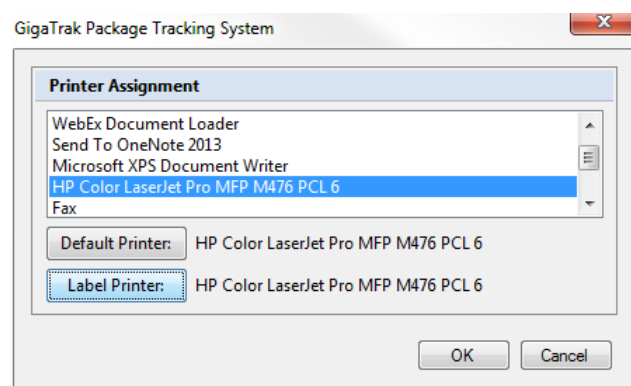
## PRINTER ASSIGNMENT

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

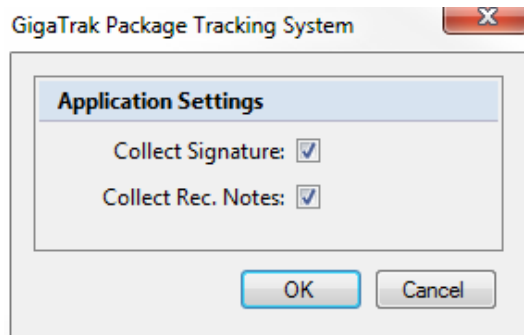




will be directed to this printer. If you do not have a label printer, assign the label printer to the same printer as the default printer.

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.

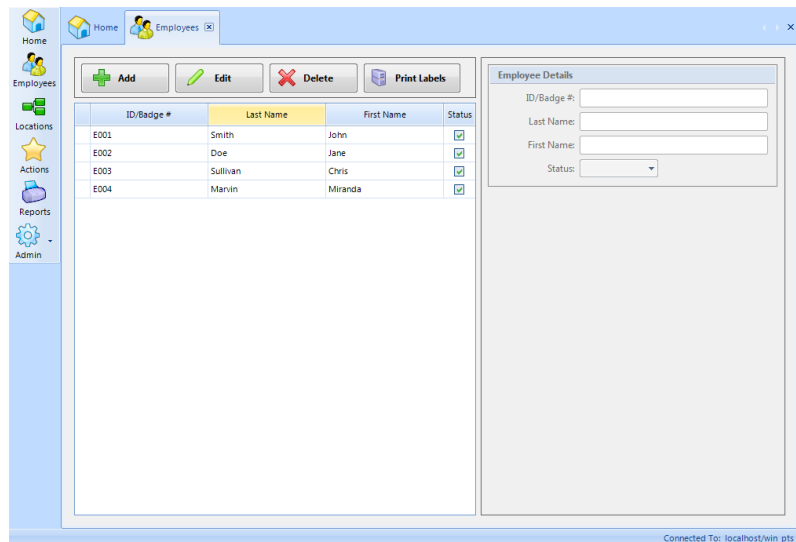
## EMPLOYEES SCREEN

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.

As a minimum, 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 format setup in the Label Designer.



## LOCATIONS SCREEN

ID	Location	Status
005	Delivery Address	<input checked="" type="checkbox"/>
004	Post Office Van	<input checked="" type="checkbox"/>
003	Madison Post Office	<input checked="" type="checkbox"/>
002	Shipment Freight	<input checked="" type="checkbox"/>
001	Kenosha Post Office	<input checked="" type="checkbox"/>

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.

As a minimum, 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 format setup in the Label Designer.

## ACTIONS SCREEN

The actions screen mimics the features available on the handheld to check in packages on the PC 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.

## 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 from the drop-down menu. Select the location ID to where the package is being received.

Scan or enter the package 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. No information will be saved without packages first being successfully received.

The screenshot shows the 'RECEIVE' tab selected. At the top, there's an 'Employee' section with 'Employee ID: E001' and 'User: Smith, John', along with 'Log In' and 'Log Out' buttons. Below this is a tabbed interface with 'Receive', 'Container', 'Transfer', and 'Deliver'. The 'Receive Packages' section contains a 'Location ID' dropdown menu, a 'Package ID' text input, and a 'Notes' checkbox with a text area. At the bottom, a 'Status' section features a 'Reset' button with a red circular icon.

## CONTAINER

The screenshot shows the 'CONTAINER' tab selected. It features the same 'Employee' section at the top. The 'Put Packages in Containers' section includes a 'Location ID' dropdown menu, a 'Container ID' text input, and a 'Container ID / Package ID' text input. The 'Status' section at the bottom has a 'Reset' button with a red circular icon.

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.

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

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. No information will be saved.

## 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 location ID from the drop-down menu. Select the location ID to which the item is being received.

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

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. No information will be saved.

## DELIVER

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

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. No information will be saved.

## 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 in the same manner as it is sorted and organized. The report can then be sent to a printer or saved to a PDF, Excel, or any number of image formats.

## MOBILE HANDHELD TERMINAL

### ADMIN

The admin function unlocks information to connect up to your database.

To access the admin function, select “admin” on the main menu. The application will prompt you for a password. The password: gigapkg.

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.

### 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 perform a reception of a package.

First, the handheld application prompts the user to scan/enter a location ID from which the package is being received. Then, scan the package ID 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.

### TRANSFER

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

In recording a transfer, first select the location ID of which the item is being received.

Scan or enter the barcode of the package/container that is being received.

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 where 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\_\_\_\_\_. Upon the successful scan of a container ID, a green message will state that the container record was saved successfully.

Scan or enter the container IDs or Package IDs of the items 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 process at any time, press the “reset” button in the bottom right corner. No information will be saved.

## DELIVER

This function allows the user to utilize the handheld application to perform a delivery of a package/container.

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.

## SYNC

The sync function allows the handheld application to be synced with the PC application. The screen will prompt you to select “sync now”, which will update the records on both the handheld and PC applications. If the sync button is in red, the function has errors and

will not work properly. Ensure that the device is connected via SQL Server/IP Address and Database Name.