PACKAGE TRACKING SYSTEM USER MANUAL

PTS USER MANUAL

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QUICK START OVERVIEW

Now that you have installed/connected to 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.

ADMIN-ACCESS GROUPS

Access groups are created to give users permissions to different functions in the system. The Admin group cannot be deleted. An unlimited number of Access Groups can be created with any mixture of access levels. Access groups are then assigned to each employee profile with login information.

EMPLOYEES

The system allows you to create users in PTS. A user may be an individual that will be using the PTS system, those who will be handling packages, or anyone that needs a package delivered to them. 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.

CARRIERS

The Carrier function allows users to enter any supplier who may be delivering packages to you. Ex, FedEx, UPS, USPS, Amazon, etc.

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 mobile app. 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

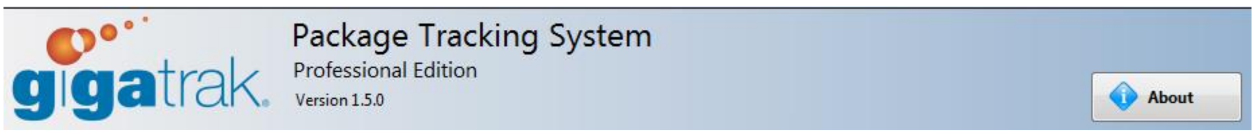
This function allows users to run, print, and e-mail or save various reports with different filters that allow for selecting useful information on various subjects. On the menu bar, select “Reports”. See Reports in this Manual for more information.

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!

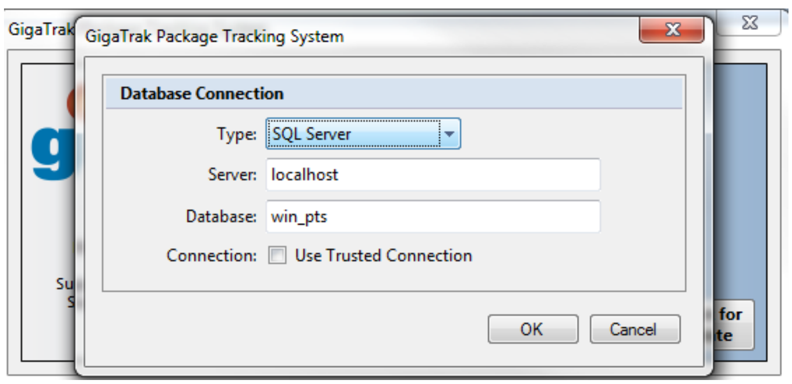
GETTING STARTED

ABOUT

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



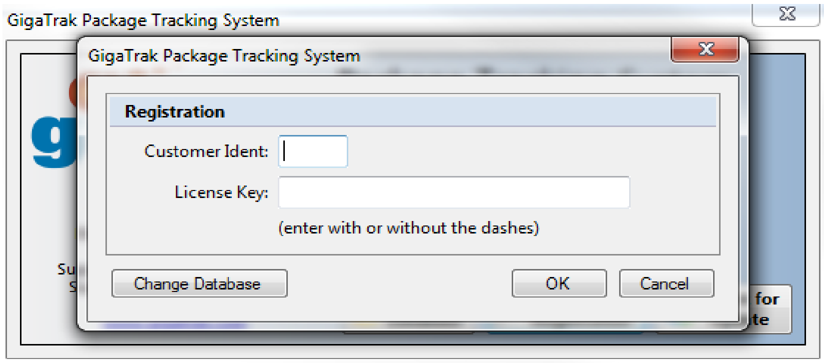
CHANGE DATABASE



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

DEVICE ADMINISTRATION

The Device Administration screen (In the Admin tab) is where Admins control devices connected to the database.

This section will list devices that are currently connected, devices that have been inactivated as well as number of total licenses, active licenses, and available licenses.

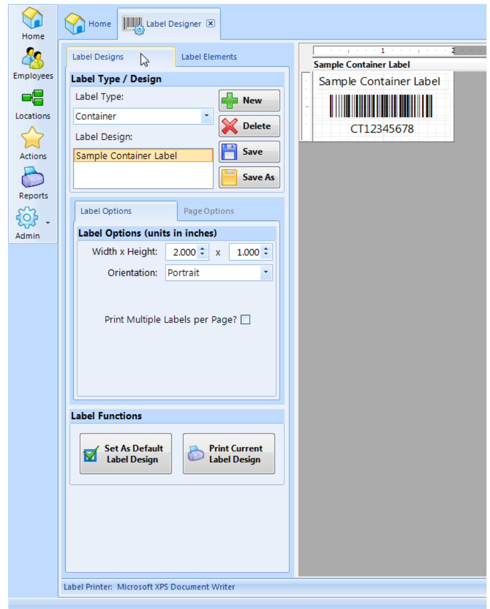
If a device has registered for the PTS app without providing a pin, an Admin can select the device from the grid and press the “Activate” button to approve the device.

To inactivate, highlight the device from the grid and press “Inactivate”. Devices that have been Inactivated cannot be reactivated for 24 hours.

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.

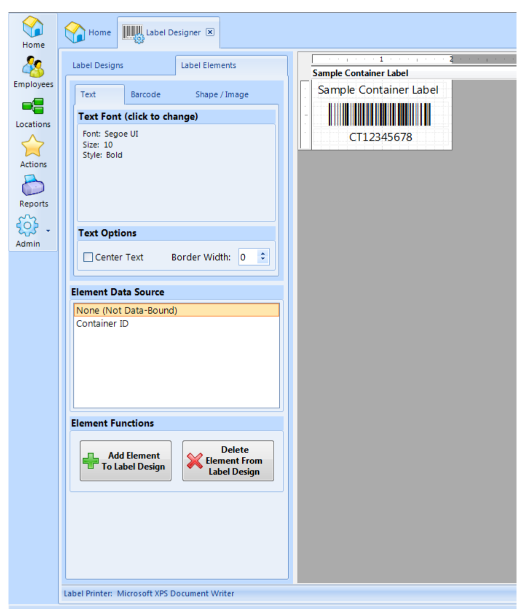
Label/Page Options

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.

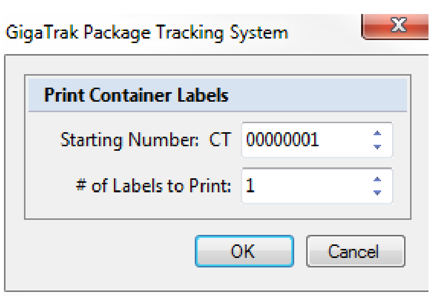
Shape/Image

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.

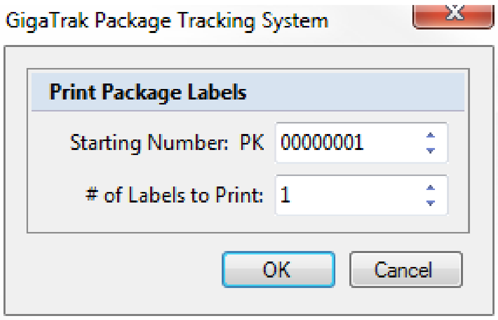
PRINT CONTAINER LABELS



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

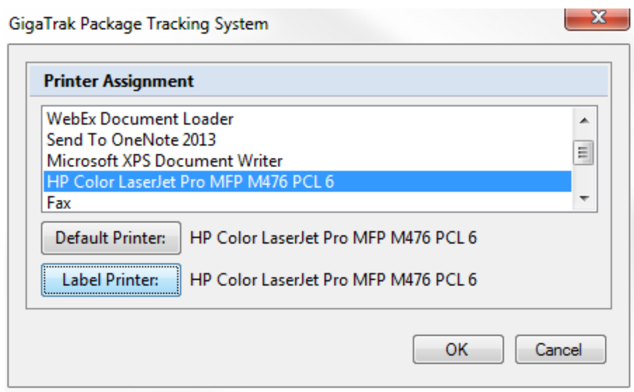


This function allows users to print off a sequence of several package labels all at once. To access this function, select Admin→Print Package Label.

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.

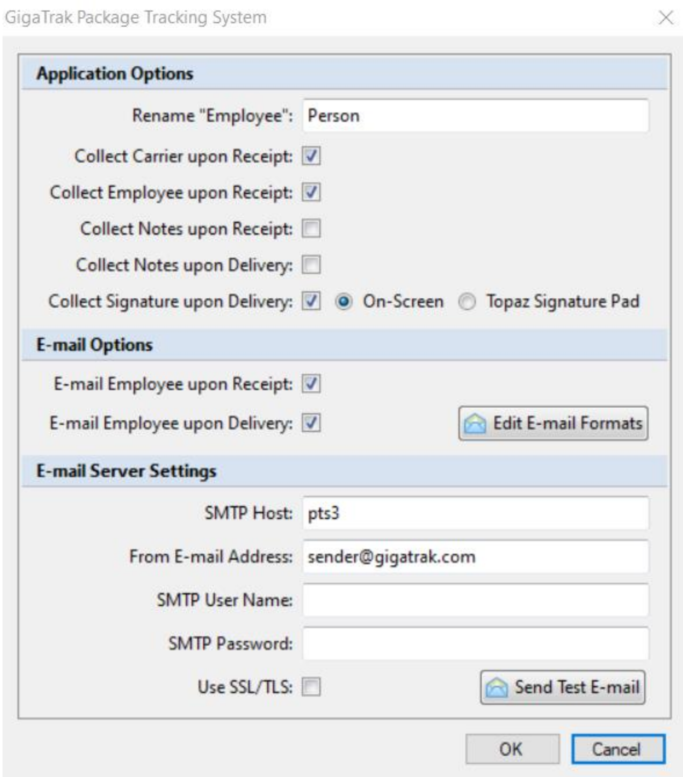
To select the report printer, select the printer of choice and then select "Assign Default Printer" button. The default printer label will indicate the printer you selected. Any reports printed by the system will be directed to this printer.

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 (APPLICATION SETTINGS)

The system allows the administrator to set several options. Select Settings→Application Settings to see these options.



Depending on your preference, or the requirements of your organization, select or deselect the appropriate checkboxes. The Application Options will affect how data is collected on the mobile app (or Actions screen).

Rename "Employee": The title field of Employee can be renamed. This is often done if users are accepting in packages for something other than an employee. (Students, vendors, suppliers, etc).

Collect Carrier: A carrier can be chosen when receiving in a package. If this option is turned off, there will be no field for carrier in the actions.

Collect Employee: An employee (or person) can be selected while receiving in packages. If turned off, there will not be an Employee field on receive.

Collect Notes Upon Receipt: If Notes are turned on, the user can enter a Note in while receiving in packages. Notes can be searched by in the Reports.

Collect Notes Upon Delivery: If Notes are turned on, the user can enter a Note while delivering a package. Notes can be searched by in the Reports. Please note only the last note entered will appear.

Collect Signature: A signature can be collected once a package is delivered. If delivering on the PC version of the system, you can choose to use a Topaz Signature Pad or on-screen delivery using your mouse. Signatures can be viewed in the Reports of each package and a proof of delivery with signature can be printed out.

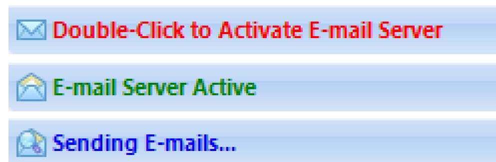
Email Employee Upon Receipt and Delivery: If these options are turned on and you receive in a package with an Employee ID, the user will be automatically emailed once the transaction goes through. (If transaction occurs on the mobile app, the auto email will not occur until a sync is made). This user MUST have an email address listed in their employee profile. If a package is delivered, the user will receive an auto email upon completed delivery transaction.

The Edit E-mail Formats button brings up another screen where the format / template of the e-mails can be set, using pre-defined tags to insert the Employee's name, etc. Be sure to click the OK button after making changes, to save them to the database.

For self-hosted systems, SMTP settings are required to be able to send emails via this application. Please contact your network administrator for the required values.

The application contains a built-in E-mail Server function, which sends emails in the background, while the application is running. This can be activated by A) selecting one or more of the E-mail Options, B) entering in valid SMTP Server settings, and C) activating the E-mail Server by double-clicking the Activate E-mail Server prompt in the lower-left corner of the screen.

Only one PC can activate the E-mail Server function at a time. If another PC / User already has it active, you will be prompted. If you choose to start the E-mail Server function anyway, it will be deactivated on the other PC.

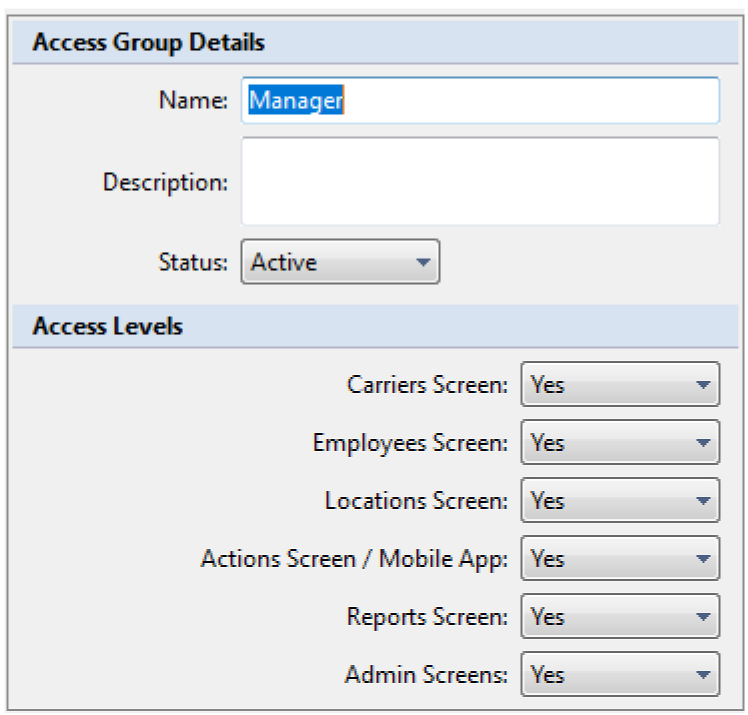


ADMIN-ACCESS GROUPS

Access groups are only needed for users that will need to login and do transactions. If an employee is not going to login, they do not need to be assigned an access group as it is not a required field. Under the 'Admin' drop-down menu, click on "Access Groups". An unlimited number of access groups can be created with any mix of access levels. Press 'Add' to create a new access group. On the right-hand side of the screen, name the access group, describe (optional), and set access levels for each of the categories. Press Save. Access groups can be edited or inactivated.

Yes – Ability to Add, Edit, View, Delete

No – No rights at all (function doesn't appear)

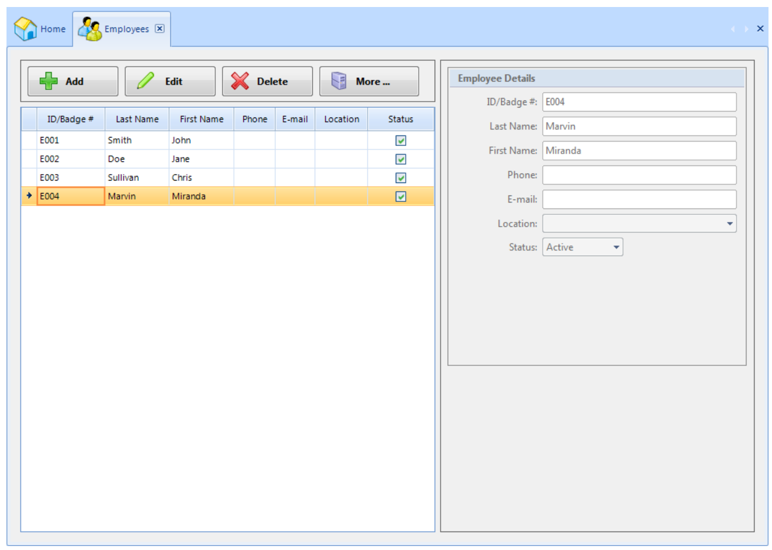


EMPLOYEES SCREEN

The Employees screen allows the 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. At a minimum, you will need to enter in the user's ID/Badge #, First Name, Last Name, and Status. You can also enter a Phone #, E-mail address (required for e-mail send functions), and select a default Location for the employee. The employee's badge/ID number acts as their barcode that must be entered when tracking a package. If this user will be logging in to either the PC version or the mobile application, they must be given a login name and password and be assigned an access group to determine what actions they can perform in the system.

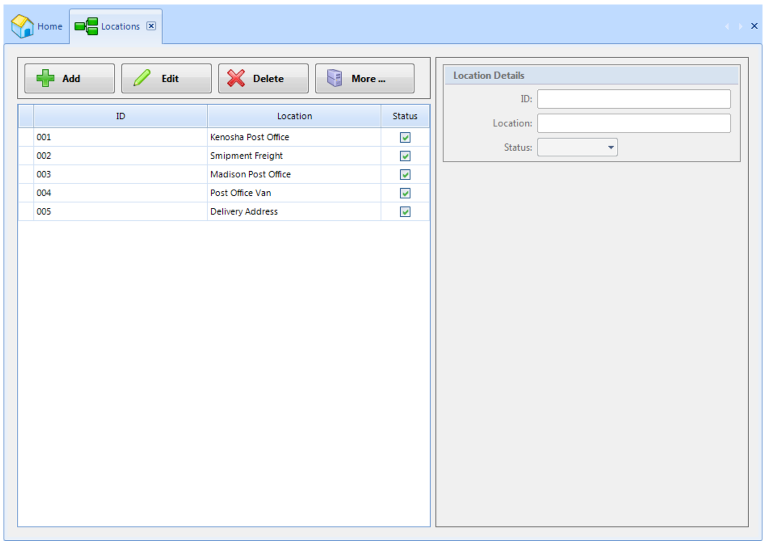
To delete an employee, select the employee and then select the "delete" button. If an employee is involved in a history record, the system will not allow the employee to be deleted. Instead, set the status to "inactive" to prevent further use and to retain the historical data tied to the employee.



Click the More button to Export, Import, or Print a barcode label 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.

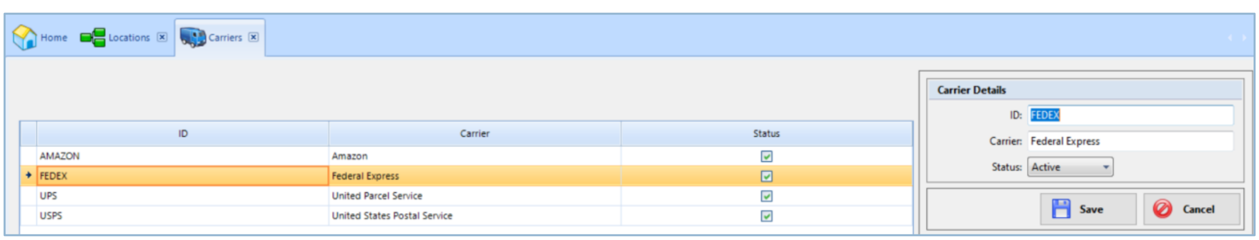
Click the More button to Export, Import, or Print a barcode label for each location based on the default format setup in the Label Designer.

CARRIERS

The Carriers screen allows for the creation of an unlimited number of carriers or suppliers upon where packages come from. Carriers are optional and not required for receiving in packages. To turn the Carriers field off, go to Settings-Application Settings and unmark the box that says "Collect Carrier Upon Receipt".

To add in a new Carrier, press 'Add'. Enter the Carrier ID/Barcode and the Carrier name. Press Save.

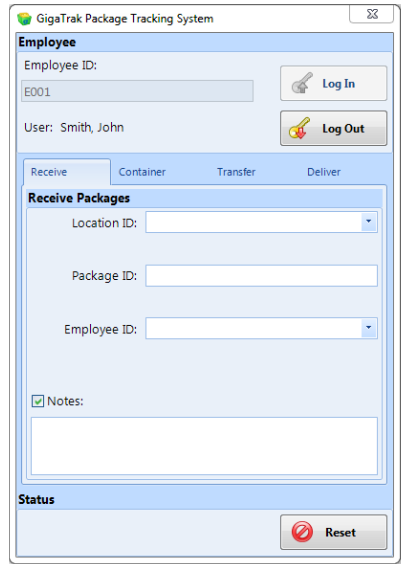
Upon Receiving in packages on the PC or mobile app, the carrier field can be choose from a drop-down menu. A Carrier filter will also appear on the Reports tab allowing users to search by them.



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. This is used when you receive in a package from a Carrier or some outside source. In recording a received package, first select a location ID to where the package is being received from the drop-down menu.

Optional – Scan or enter the Carrier ID for the packages.

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

Optional - Scan or enter an Employee ID of the person that the package is for. Or, select or type an employee's name (last name, first).

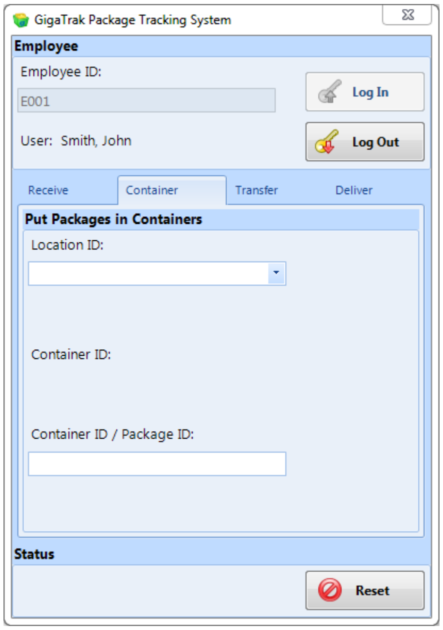
Optional - Enter in any notes that need to be captured for the package.

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

If Carrier and Employee are turned on in the application settings, they will be required fields when receiving in a package. Carrier, Employee, and Notes can all be turned off in the Settings.

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.

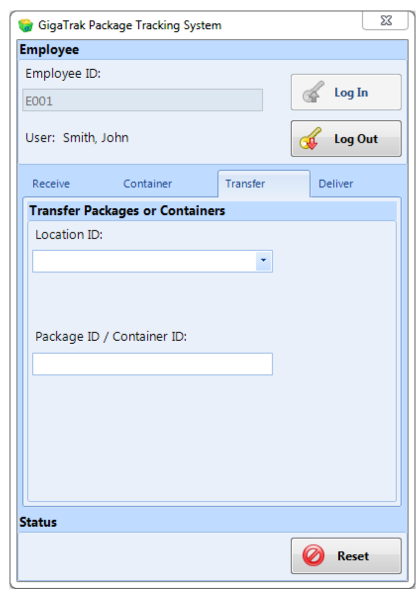
TRANSFER

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

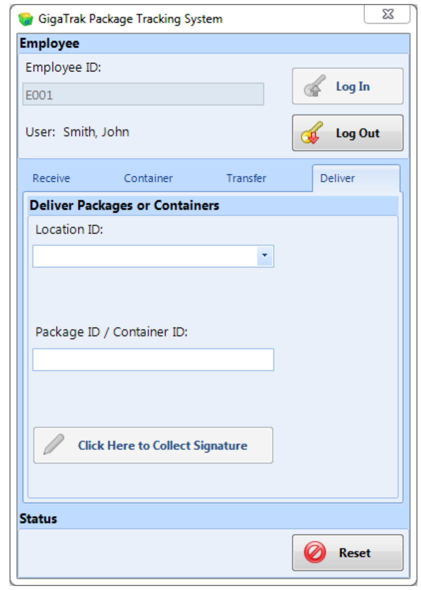
The fourth tab is deliver. In recording a delivered package or container, first select the ID of the location where the item was delivered from the drop-down menu or scan/enter location barcode.

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

Optional – Notes. Enter any delivery notes. Notes upon delivery can be turned off in the Settings.

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



SIGNATURE

A signature may also be collected at this time. All packages delivered to the selected location while on the Delivery screen will have the signature attached.

The Signed By field will be pre-filled if the system can recognize a unique recipient based on the employee selected at the time of receipt.

If "Collect Signature Upon Delivery" is turned on in the Settings, you will also be able to sign for packages being delivery. Click on "Click here to Collect Signature". All packages scanned to that same location will be singed for together. The system will also show you a count of packages that you are signing for. If each package needs a different signature, you will need to delivery each package barcode separately, collect signature, save signature. Once a signature has been saved, the screen will Reset.

A proof of delivery signature can then be brought up on the Reports screen for each package.

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:

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

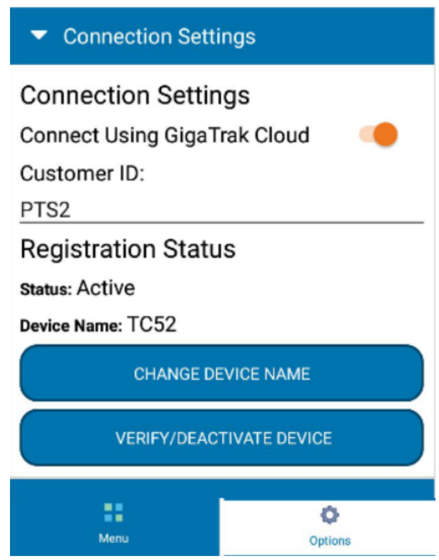
When the report is viewed, the data will be presented. The data can be sorted by any of the columns in the table below by clicking on the header of the column. When the filters are set as desired, the user can then select the Print button on the upper right-hand side of the screen. A print preview screen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

PTS MOBILE HANDHELD APPLICATION

WIRELESS HANDHELDS

The Package Tracking system allows a user to use a wireless device to perform transactions on the go away from a computer. This device can be Android or iOS. If you have a self-hosted system, you must setup a self-hosted web-service off your own intranet. See web-service install. If you are cloud, you just need to be connected to WIFI/Data. Wireless handheld units communicate with the host database in real time when a sync is performed. You do not have the ability to plug the unit into the PC to do a sync.

ADMIN/WIRELESS SETUP



Go to your App Store or Play Store and download the GigaTrak PTS Mobile Application. Once downloaded, open up the mobile application and following the below instructions for cloud or self-hosted.

Cloud – For cloud customers, turn on the cloud toggle button and enter your customer ID number provided in your order acknowledgement email. Press "Verify Web-Service".

Self-hosted – For self-hosted customers, turn off the cloud toggle button and enter your web-service URL. This is retrieved from your IT department as they are hosting your own web-service for the system. Once entered, press "Verify Web Service".

Next, name your device. Each device needs a unique name. Most devices will auto-populate a name. You can choose to name your device anything you want as long as it's unique from other device names.

A device can be registered with or without an activation pin. An activation pin is included in your Device Order Acknowledgement email. Registering a device with a pin will immediately register and activate that device if there is an open license available. Registering a device without an activation pin will register but not activate the device. An Admin can then go activate the device on the PC version of the system under Admin-Device Administration. Press "Register Device".

If you are using a regular cell phone or tablet to perform transactions and what to use your devices camera to scan a barcode, turn on the 'In App Barcode Scanner' . If you purchase an actual Android barcode scanner, turn this setting off.

Last, perform a Sync. You must have internet connection to perform a sync. Once you have synced, press "Finish Setup". The app will now bring you to the main login screen.

Login to the app with your same username and password you use on the PC version of the system.

MOBILE APPLICATION LOGIN

When the handheld application is first started, a user login will be required. Enter the employee login name and password, then press the “login”. If the data matches a profile in the database, the user will be logged in under their name.

The user barcode is tied to the records that are recorded by the handheld. If a different employee uses the handheld, he/she should be logged into the app under their own name. To change the user, select the “logout” button and enter the new employee login information.

MOBILE APPLICATION FUNCTIONS

Upon signing in, 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.

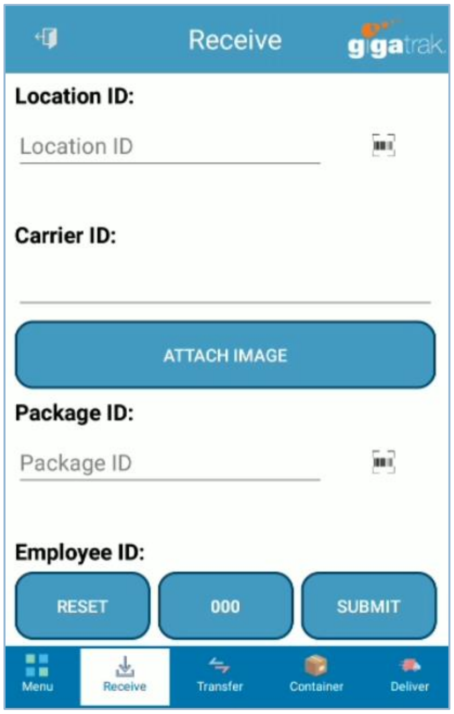
To logout of the system, select the “logout” button on the home screen.

IN-APP BARCODE SCANNING

If you are using a regular cell phone or tablet’s camera to “scan” a barcode with the device’s camera, you will need to click on the barcode icon next to each title field. This will bring up the devices camera to scan a barcode. Once the camera focuses on the barcode, it will automatically return back to the screen with the barcode entered into the field.

If the scan icon is not appearing, logout of the PTS mobile app and click on “Options” on the main login page. Under Application Settings, turn on the toggle button for “Enable in-app Barcode Scanner”.

RECEIVE



This function allows the user to utilize the app to receive a package.

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

Choose a Carrier from the menu by clicking on the Carrier field.

To attach a picture upon Receiving, select “Attach Image”. You can choose to select a picture from the Gallery of your device or take a new photo. To take a new photo, select “New Photo”. If prompted, you must “Allow GigaTrak PTS to take pictures and record video” and “Allow GigaTrak PTS to access photos, media, and files on your device”. The device’s camera will pop-up allowing the user to capture a picture. Once a picture has been taken the user can Submit or Clear to take a new picture.

Then, scan the ID of the package that is being received.

Scan or enter an Employee ID of the person that the package is for. Or, type an employee’s name (last name, first) and select from the list.

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

Press “Submit”. If the package was successfully received, the top of the screen will show “Package received successfully” message in green.

To cancel the process at any time, select the “Reset” button in the bottom left corner.

The fields of Carrier, Employee, and Notes can be turned off on the PC under the Settings. This allows transactions that occur to just be a location and package scan.

*Transactions must be synced on the Main Menu screen for the PC version to be updated.

TRANSFER

This function allows the user to utilize the mobile application to transfer a package/container. This function is used if the package is moving to another location that is NOT a delivery location.

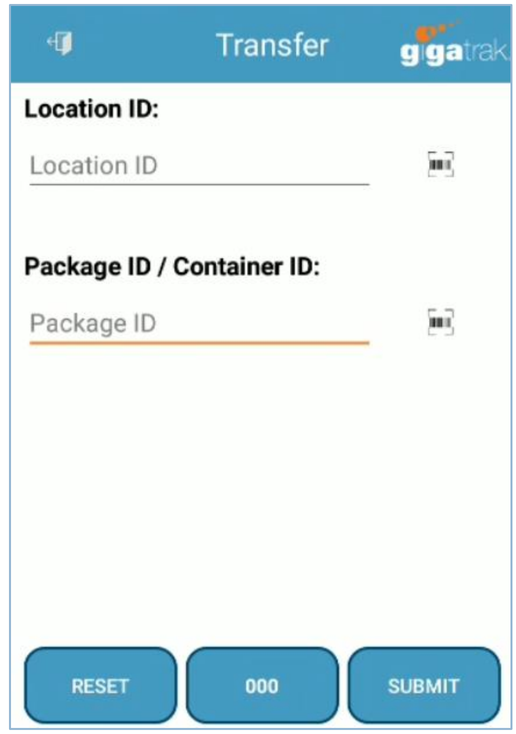
In recording a transfer, first enter/scan the ID of the location that the package is being transferred to.

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

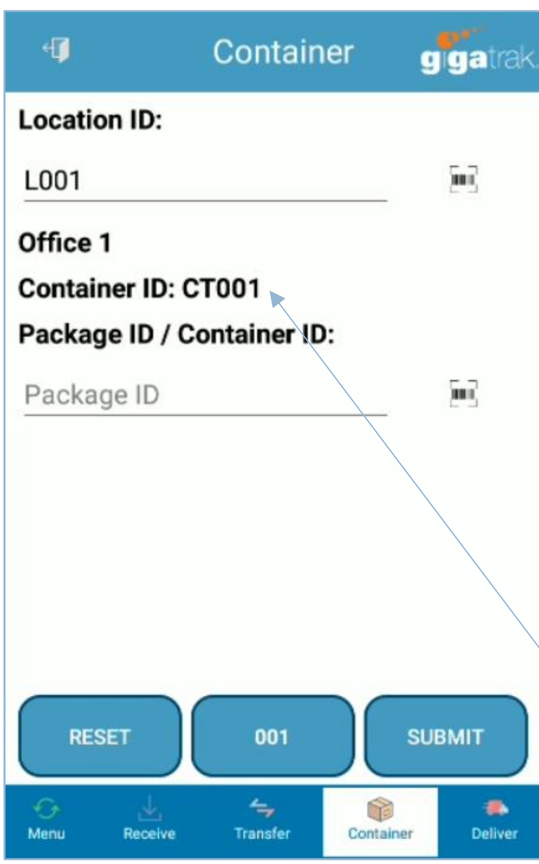
Press “Submit”. If the package was successfully transferred, the screen will flash a “Package transferred successfully” message in green.

To cancel the process at any time, select the “Reset” button in the bottom left corner.

*Transactions must be synced on the Main Menu screen for the PC version to be updated.



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.

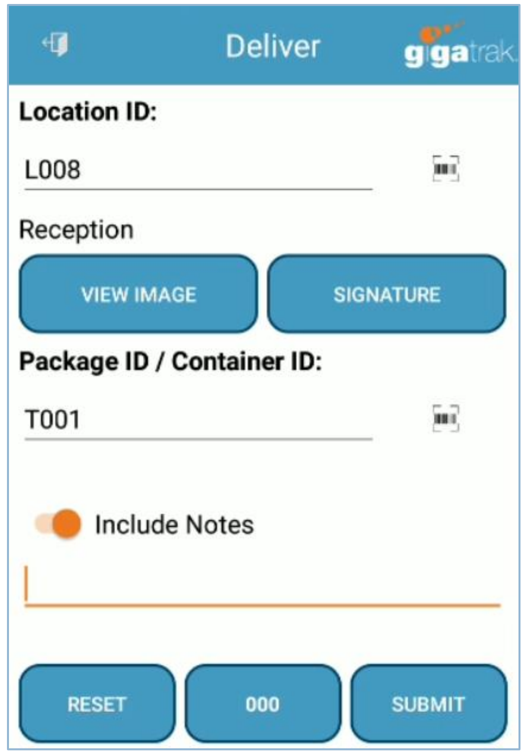
Scan or enter the ID of the container in which the packages will be placed. The container ID will start with CT_______. Upon the successful scan of a container ID, a green message will state that the container record was saved successfully.

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”.

*Transactions must be synced on the Main Menu screen for the PC version to be updated.

If a Container ID is not entered first, you will get an error. The page will display what Container you are transferring packages to.

DELIVER



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

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

To add an image to a single package delivery, press “Attach Image”. Choose to take a new image with the camera or add an image from your device’s gallery. Once an image has been taken/chosen, press Save. An image must be attached before scanning a package barcode. Images are not required and only attach to one package barcode at a time.

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

Enter any optional notes for the delivery of the package.

Upon entering/scanning the Package barcode, a new button labeled “Signature” will appear. Click the button to collect an on-screen signature. Enter the name of the person who signed and press “Save”. The transaction will be submitted automatically. (Notes must be entered before collecting a signature).

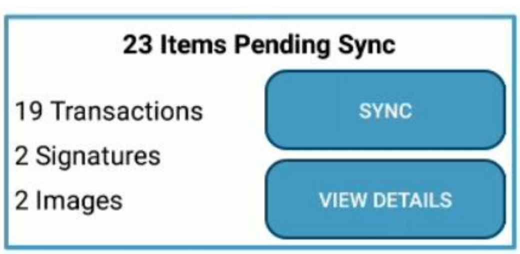
Hit the “Submit” button or press “Enter”. If the item was successfully delivered, the screen will flash a “Package delivered successfully” message in green.

To cancel the process at any time, select the “Reset” button in the bottom left corner.

*Transactions must be synced on the Main Menu screen for the PC version to be updated.

SYNCING

Once transactions are completed, they will need to be synced over WIFI or Data (if cloud) to update the main database. To do so, click on the Main Menu. The bottom of the screen will show how many transactions need to be synced.



Press the “Sync” button to sync the device’s transactions with the host database. By clicking on “View Details” you can clear all pending transactions or email them. Once the Sync is complete, a notification saying “Sync Complete” will populate in green at the top of the screen. If any errors in syncing occurred, they can be viewed and cleared as needed.

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 in one year increments, these services are extended. Cloud subscriptions include all support and updates during your cloud term. Please call 262-657-5500 extension 2 with any questions.