

@Par Client Users Guide TrackIT @Par version 2.6.3

**This document is intended for use by
End Users and Functional Managers**

**Revision 2
January 12, 2007**

Change Document

Revision	Date	Description of Change
1	7/23/06	Insert figure numbers for all illustrations.
2	01/12/07	Revise content/Replace Screen Captures to update to current release level.

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Logging in to @Par

Prior to entering any @Par product, your functional manager will need to set up a **UserID** for you. This is covered in the **@Par Server Users Guide Deliver** documentation.

Upon being informed that you have a user ID you will need to TAP the **Start** option from the Hand held Start Screen. See: **Figure 1**



Figure 1

You can see that the Functional Manager here has set up this Hand held with an **@Par** option in the Start menu. Your manager may or may not do this. So, if you don't see the **@Par** option on this screen, TAP the **Programs** option/menu: **Figure 2**

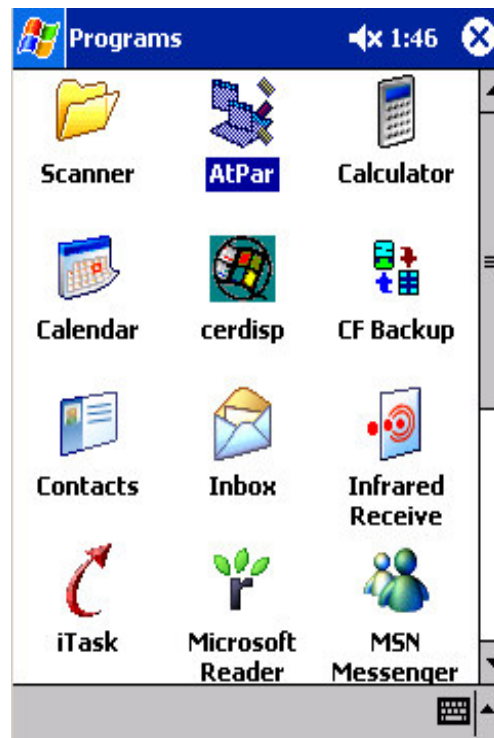


Figure 2

To access the **@Par** login screen, *TAP* the **@Par** icon shown in the screen above. You should now receive the **@Par Login Screen: Figure 3**

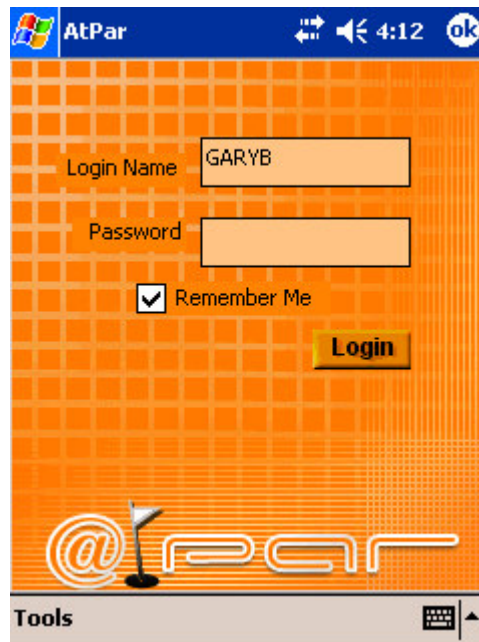


Figure 3

In this case, the **UserID** of the person who used this hand held last will appear. In this example the UserID is "GARYB".

If your Functional Manager has **not** set up a UserID for you, when you attempt to log in to @Par you will receive the below message: **Figure 4**

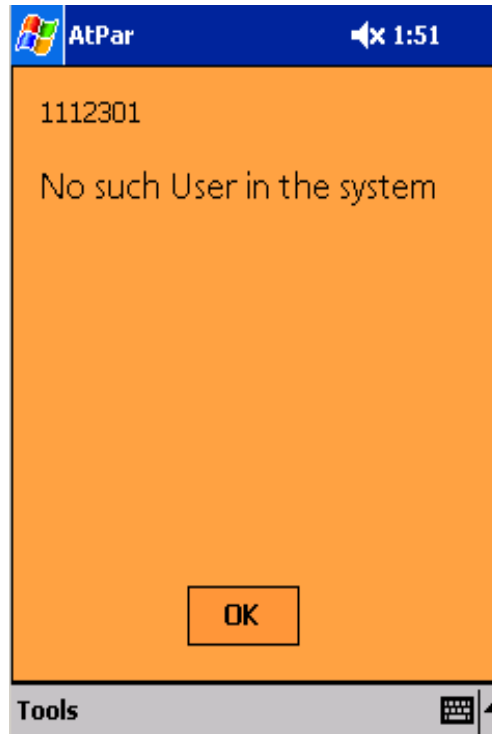


Figure 4

Contact your Functional Manager and they will set you up with a UserID and Password if necessary.

@Par Apps Screen

Based on how the Functional User has set you up, you will receive the applicable @Par module/s as icon/s on this screen. The Functional Manager has set this user up with @Par TrackIT privileges and access: **Figure 5**



Figure 5

TAP the **TrackIT** Icon and you will see the **AtPAR TrackIt Status Report** screen which is the primary screen for the **@Par TrackIT** application.

@Par TrackIT

The Main screen, or Status Report screen, for the **AtPar TrackIT** Application: **Figure 6**

AtPar TrackIT 7:00

Status Report for RHATT

Location [] Find Addr Exit

Dt From 08/10/05 To 08/15/05 Get AddItem

Request# [] Recip. []

Return LocUpdate Synch [] Multi

SendSelected SendAll P L U D Items

Location	Descr	Status	User
----------	-------	--------	------

Tools

Figure 6

Location – Deliver to location. Where the item is being delivered to, either location or department. You can either **Scan** the location or **Type** the location *manually* in this field.

Find – Combined with typing the *Location*, when you TAP this button, the *Location* or the first few characters of the *Location* which you typed in will appear, highlighted. If the *Location* that you entered is **not yet** downloaded to the hand held you will receive a message telling you the Location is not found.

Addr – Tap this button to see details of a delivery/location, for example street address, City, zip, etc.

Exit – This option will exit the **@Par TrackIt** application.

Dt From To – This is generally set up and defaulted to one day. Use the *Get* button in conjunction with the date range, and you will receive the locations this user can deliver to.

Get – Used to download the *Location* you will deliver items to. The locations you retrieve will be based on how your Functional Manager has set you up on the **@Par**

Server.

- **Under TrackIT - Allocate Locations** option checked
- Whether the **Functional Manager** has set the **Allocation** check box

AddItem – Allows hand held user to add box type items to inventory.

Request # - Cart request #.

Recip. – Recipient - This is for the name of the individual actually receiving the delivery.

Return – Used to return items to storage location.

LocUpdate – Used to change/move locations of items already delivered.

Synch – After adding items or changing/moving locations users use this option to synchronize data to server.

Send Selected – With locations in any status, you can highlight them and using the Send Selected button, upload the information to the main ERP server.

Send All – Sends all Pickup, Load, Unload, and Deliver status to the ERP server without highlighting each location.

P – This is the button the driver/User selects to confirm PICKUP.

L – This is the button the driver/user selects to LOAD a selected location.

U – This is the button the driver/user selects to UNLOAD.

D – This button is used by the driver/user to obtain a signature and confirm delivery.

Items – This button will take you to the Items detail screen.

Multi – This is a check box that when you have checked it, will allow you to select more than one Location to Deliver. There is more on this box later in the documentation.

How to GET Locations and Items

When you are ready to use the @Par TrackIT product, you will first need to get locations and items.

First, ensure that the **Dt From** and **To** are in that day's range.

Now scan the location bar code, manually type in the location, or leave the location blank and **TAP** the **Get** button.

You should get the screen below: **Figure 7**

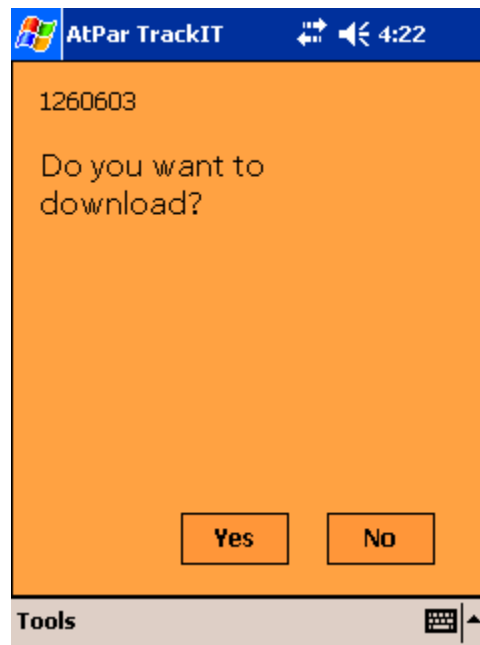


Figure 7

TAP the **Yes** button if you want to download this location, or the **No** button if you don't want to download. **TAP** the **Yes** button for now.

You should now see the following screen: **Figure 8**

Location	Descr	Status	User
L_Loca...	L_Location	DOWNLOAD	RHAT
L_office	L_office	DOWNLOAD	RHAT
Office 1	Any Offi...	DOWNLOAD	RHAT

Figure 8

The screen will display the Location, Description, Status, and several other fields. Note the status is *DOWNLOAD*. This simply means the location and item/s associated have been downloaded to the hand held.

This is all there is to downloading locations to the hand held.

The next step to look at is *Pickup*.

How to Pickup

Now that you are familiar with how to download a location let's go through the steps to Pickup. Pickup is generally defined as the step in the process that the Delivery Drivers have "Picked up" the package.

Location, Request#, and Recip. are all scannable fields.

Refer to the screen below: **Figure 9**

Location	Descr	Status	User
L_Loca...	L_Location	DOWNLOAD	RHAT
L_office	L_office	DOWNLOAD	RHAT
Office 1	Any Offi...	DOWNLOAD	RHAT

Figure 9

The *P*, *L*, *U*, and *D* buttons are "grayed out". If you try to tap on one of these, nothing will happen.

You need to highlight a location first before you can *PICKUP*. Highlight the location and TAP the *P* button. If you use bar codes just scan the Location label.

Based on how your Functional Manager has set you up in @Par TrackIT, you may or may not see the next screen. Generally most organizations want their drivers/users to confirm the *PICKUP*: **Figure 10**

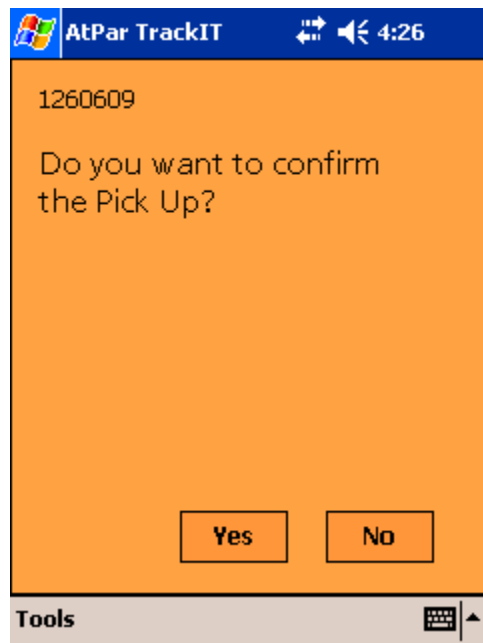


Figure 10

TAP NO and you will return to the @Par TrackIT status report screen.

TAP YES and you will also return to the @Par TrackIT status report screen, but you will see the status has changed to *PICKUP*: **Figure 11**

Location	Descr	Status	User
L_Loca...	L_Location	DOWNLOAD	RHAT
L_office	L_office	PICKUP	RHAT
Office 1	Any Offi...	DOWNLOAD	RHAT

Figure 11

Also note the *L*, *U*, and *D* buttons are now enabled.

This is all you need to do in order to *PICKUP* an item or location.

The next step in the @Par TrackIT process is *LOAD*.

How to LOAD

Generally the next step in **@Par TrackIT** after *PICKUP* is the *LOAD* step. This is generally described as the process of placing the package on the delivery truck.

Before you can initiate this step, you must have at least one Item/Location in the *PICKUP* status.

Highlight the *Location* and **TAP** the **L**. You get the following screen: **Figure 12**

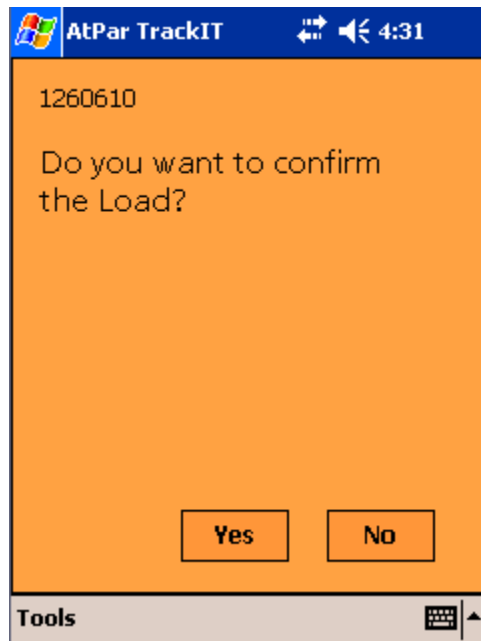


Figure 12

TAP NO to return to the **@Par TrackIT** status report screen.

TAP YES to *LOAD* this location/item and also return to the **@Par TrackIT** status report screen. As with *PICKUP* before, you will see the Status has changed. This time the Status is *LOAD*. See the screen on the following page: **Figure 13**

AtPar TrackIT 7:20

Status Report for RHATT

Location [] Find Addr Exit

Dt From 08/10/05 To 08/15/05 Get AddItem

Request# [] Recip. []

Return LocUpdate Synch ☐ Multi

SendSelected SendAll P L U D Items

Location	Descr	Status	User
L_Loca...	L_Location	DOWNLOAD	RHA1
L_office	L_office	LOAD	RHA1
Office 1	Any Offi...	DOWNLOAD	RHA1

Tools []

Figure 13

This is all you need to do to get a location/item *Loaded*.

The next step in the @Par TrackIT process is *UNLOAD*.

How to UNLOAD

Before you can perform the *UNLOAD* process, a location/item must be in the *LOAD* status. This is generally described as removing the package from the Deliver truck.

Highlight the Location of *LOAD* status and **TAP** the **U**. You will now see the following screen: **Figure 14**

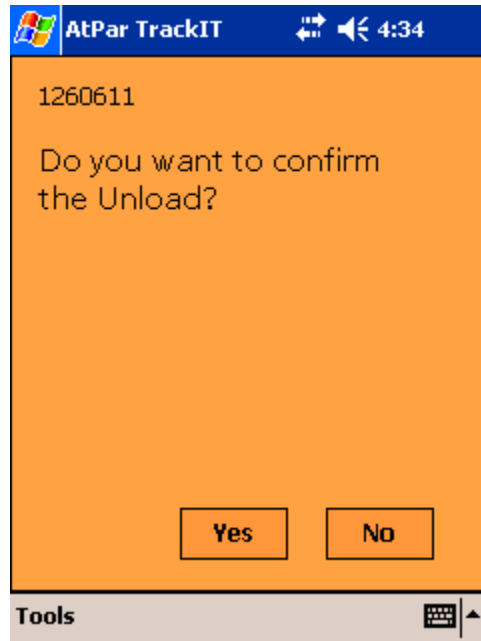


Figure 14

TAP NO to return to the @Par TrackIT status report screen.

TAP YES to *UNLOAD* this location/item and also return to the @Par TrackIT status report screen. As with *PICKUP* and *LOAD* before, you will see the Status has changed. This time the Status is *UNLOAD*.

See the screen on the following page: Figure 15

AtPar TrackIT 7:21

Status Report for RHATT

Location [] Find Addr Exit

Dt From 08/10/05 To 08/15/05 Get AddItem

Request# [] Recip. []

Return LocUpdate Synch ☐ Multi

SendSelected SendAll P L U D Items

Location	Descr	Status	User
L_Loca...	L_Location	DOWNLOAD	RHAT
L_office	L_office	UNLOAD	RHAT
Office 1	Any Offi...	DOWNLOAD	RHAT

Tools []

Figure 15

You have now completed the *UNLOAD* process. Last, but certainly not least, is the Deliver process itself.

How to Deliver Requested Items

You are now ready to deliver the product to the Location/Requestor.

First, highlight the *Location*.

TAP D and you get the following screen: **Figure 16**

Location	ItemID	ReqID	Qty
<input checked="" type="checkbox"/> L_office	35		1

Figure 16

This is the **@Par TrackIT Signature** screen.

Recip. – Using the keyboard, type in the name of the person who received or is receiving the item/s.

Back – If you need to return to the **@Par Trackit** Status Report screen, **TAP Back**.

Confirm – Used after obtaining a signature to Confirm delivery. This changes the status on the **@Par Trackit** Status Report screen to *Deliver*.

Attempt – This function is used by the driver/user to note that an attempt was made to deliver the item but for some reason they were unable to deliver the item.

The bottom section of the Signature screen displays information also: **Figure 17**

Location	ItemID	ReqID	Qty
<input checked="" type="checkbox"/> Mem01	1	1003	1

Figure 17

Use the scroll bar on the bottom of the screen to see all columns, as explained below.

Location – Location that the items will be delivered to. If you need to widen the columns you can by using the stylus and sliding the divider between the columns over, or you can double tap the divider, and it will adjust the column width automatically.

ItemID – ItemID number of the item being delivered to this location.

ReqID – This is the Department ID of the Requestor.

Qty – This is the quantity of the item for delivery.

At this point if you need to deliver the items and get a signature, all you need to do is have the person receiving sign in the blank white area above the detail section.

Please see the following screen: **Figure 18**

Signature

Recip: latha

Confirm Back

Attempt

Latha

Location	ItemID	ReqID	Qty
<input checked="" type="checkbox"/> L_office	35		1

Navigation: Back, Confirm, Attempt

Figure 18

To sign, the receiver only needs to use the stylus and write in this section. If you prefer they print their name, they may do that using the stylus as well.

At this stage, if you are ready to deliver the item, you can simply TAP the Confirm Button. However, we need to review two areas prior to delivering this product.

First, let's assume the recipient is incorrect and the wrong person signed. If you catch this BEFORE TAPPING on the Confirm button, you can correct the problem.

TAP the **Back** button and you will receive the following screen: **Figure 19**

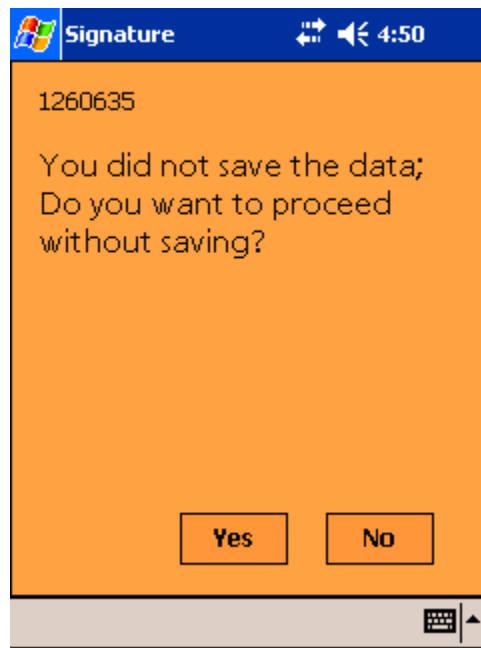


Figure 19

Selecting **YES** will send you back to the status report screen and you may repeat the process.

Selecting **NO** will return you to the **Signature** screen to continue delivery.

In this case, we will select **YES** to return to the status report screen.

You can see that it is now back at the status report screen and ready to be delivered. The status remains **UNLOAD**: **Figure 20**

Location	Descr	Status	User
L_Loca...	L_Location	DOWNLOAD	RHA1
L_office	L_office	UNLOAD	RHA1
Office 1	Any Offi...	DOWNLOAD	RHA1

Figure 20

The second item we need to look at is the **Attempt** Button. The function of this button is when you “attempt” to deliver an item and the recipient is not there. You can enter comments that you attempted to deliver the item, place the item back for re-deliver and continue on with other deliveries.

Highlight the item again and **TAP D**.

You will be back on the **Signature** screen.

TAP Attempt and you will receive the following screen: **Figure 21**

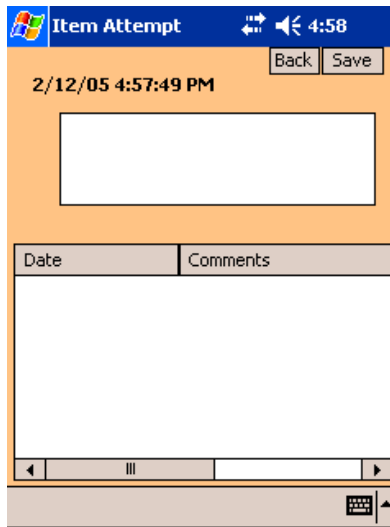


Figure 21

The two sections of the Item Attempt screen are:

- The lower portion which displays dates and comments from prior delivery attempts
- The upper section which is used to enter your comments

To enter a comment, **TAP** the cursor in the upper white box. A cursor should appear in this area and the keyboard will “pop” up for your use.

- Type in a comment such as “Recipient in meeting. Will return to deliver later”

TAP Save to return to the Signature screen. Now **TAP Attempt** again.

You will now see the following screen: **Figure 22**

Date	Comments
2/12/05 5:05:47 ...	Recipient in mtg, will retur

Figure 22

As you can see, the date and time you attempted to deliver the item are now noted, and the comments are displayed.

The important thing to remember with the delivery of any item in **@Par TrackIT** is the deliver process is not complete until you select the *Confirm* button.

At the signature screen, have the recipient sign for the delivery. See the following screen: **Figure 23**

The screenshot shows a mobile application interface titled 'Signature'. At the top, there is a status bar with a Windows logo, the word 'Signature', and a clock showing 7:27. Below the status bar, there is a text input field containing 'latha', followed by 'Confirm' and 'Back' buttons. An 'Attempt' button is located below the input field. The main area of the screen displays a large, stylized signature 'Latha'. Below the signature, there is a table with four columns: 'Location', 'ItemID', 'ReqID', and 'Qty'. The table contains one row with the following data: 'L_office' (with a checked checkbox), '35', and '1'. The bottom of the screen features a navigation bar with a back arrow, a central menu icon, and a forward arrow.

Location	ItemID	ReqID	Qty
<input checked="" type="checkbox"/> L_office	35		1

Figure 23

TAP the **Confirm** button.

If your organization uses a wireless environment you will be returned to the status screen and ready to go to the next item to be delivered.

If your organization is in a non-wireless environment, you will be returned to the status screen and have one final step. See the following screen: Figure 24

Location	Descr	Status	User
L_Loca...	L_Location	DOWNLOAD	RHAT
L_office	L_office	DELIVER	RHAT
Office 1	Any Offi...	DOWNLOAD	RHAT

Figure 24

The status has changed yet again, this time to *DELIVER*. The final step is sending your deliver items to the server. You can do this using one of two buttons.

SendSelected – Highlight any item with a status of Deliver and **TAP SendSelected** to send that information to the server.

SendAll – **TAP SendAll** and it automatically sends *all* items that have a status of Deliver to the server. You do not need to highlight each individual item.

Now you have completed you delivery.

Note: if the user attempts to deliver *Equipment* items they will receive the following message when attempting to move into PICKUP status: Figure 25



Figure 25

TAP OK.

You will receive the following display upon return to the @Par TrackIT status report screen: **Figure 26**

AtPar TrackIT 7:35

Status Report for RHATT

Location [] Find Addr Exit

Dt From 08/10/05 To 08/15/05 Get AddItem

Request# [] Recip. []

Return LocUpdate Synch ☐ Multi

SendSelected SendAll P L U D Items

Location	Descr	Status	User
L_Loca...	L_Location	DOWNLOAD	RHAT
Office 1	Any Offi...		RHAT

Tools []

Figure 26

Notice the item we just attempted to PICK is now in a BLANK status.

1. This indicates that there are multiple items for this location and they have “mixed statuses” (i.e., PICK, DELIVER, LOAD, UNLOAD)

Highlight this location again and **TAP** the **Items** button.

You will receive the following screen: **Figure 27**

Item ID	Stora...	Serial ...	Status
29	Stores		DOWNLOAD
29	Stores		DOWNLOAD
39	Ware...		PICKUP

Figure 27

Now you highlight those items with a status of **DOWNLOAD** and **TAP P** to place them in **PICKUP** status.

You may receive the following message when selecting the **P** button for PICKUP:

Figure 28

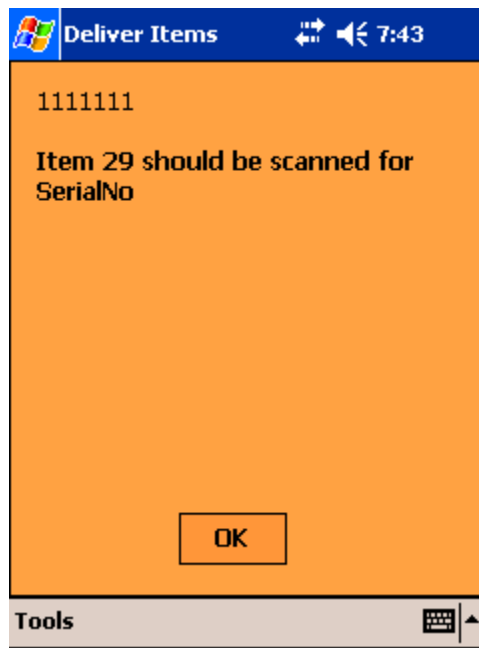


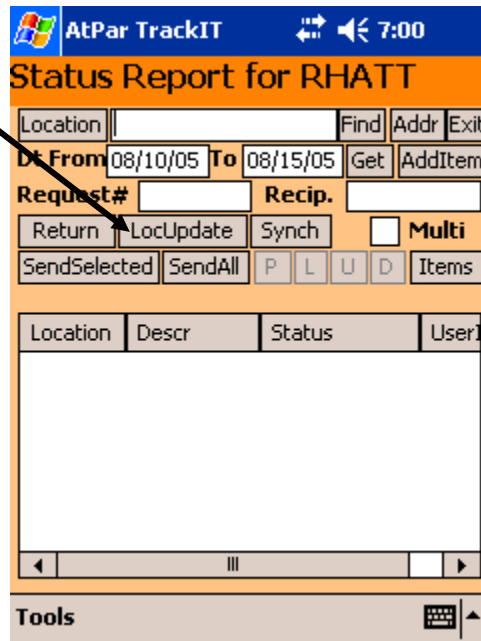
Figure 28

TAP OK and either scan the serial number or enter the number manually.

This is the method which you use if you want to deliver items from the Items screen.

Location Update

The **LocUpdate** button is used to move/change/transfer an item from one physical location to another without changing on the @Par Server. This is mainly used for Equipment tracking: **Figure 29**



The screenshot shows the 'AtPar TrackIT' application window. The title bar includes the Windows logo, 'AtPar TrackIT', and system icons for network, volume, and time (7:00). The main window has an orange header 'Status Report for RHATT'. Below this is a form with several input fields and buttons. A black arrow points from the 'LocUpdate' button in the form to the 'Location Update' section header in the text above. The form includes fields for 'Location', 'Dt From' (08/10/05), 'To' (08/15/05), 'Request#', and 'Recip.'. There are buttons for 'Find', 'Addr', 'Exit', 'Get', 'AddItem', 'Return', 'LocUpdate', 'Synch', 'Multi', 'SendSelected', 'SendAll', and a set of buttons labeled 'P', 'L', 'U', 'D', 'Items'. At the bottom, there is a table with columns 'Location', 'Descr', 'Status', and 'User'. The table is currently empty. A 'Tools' button is located at the bottom left of the window.

Figure 29

NOTE: In order for this functionality to work correctly, you need to have the “Provide equipment location update” check box checked under Product Parameters on the @Par Server.

TAP the **LocUpdate** button and you will receive the following screen: **Figure 30**

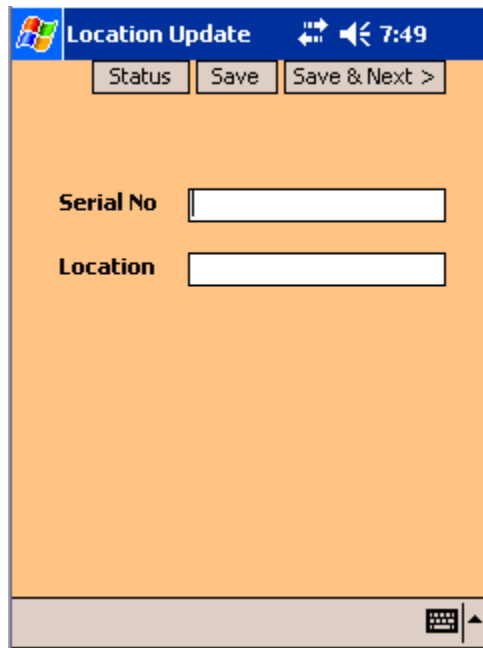


Figure 30

In this example, we want to move the item with a serial number of 568TV from the Office 1 location to Office 15 location.

Enter or scan the serial number of the item, and enter the location where the item is to be moved to. See the next screen: **Figure 31**

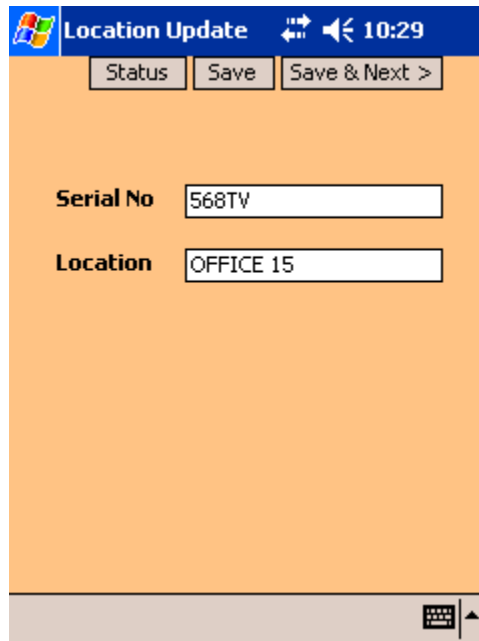


Figure 31

Status – Returns user to the @Par TrackIT status report screen.

Save – Saves the update information but does not send the information to the server at this point. The user will see the following screen upon selecting this button: **Figure 32**

Save & Next > - Saves the current information and refreshes screen so user may enter additional item serial number and location. Upon completion user will select the SAVE button to complete entry and receive the SYNCH message.

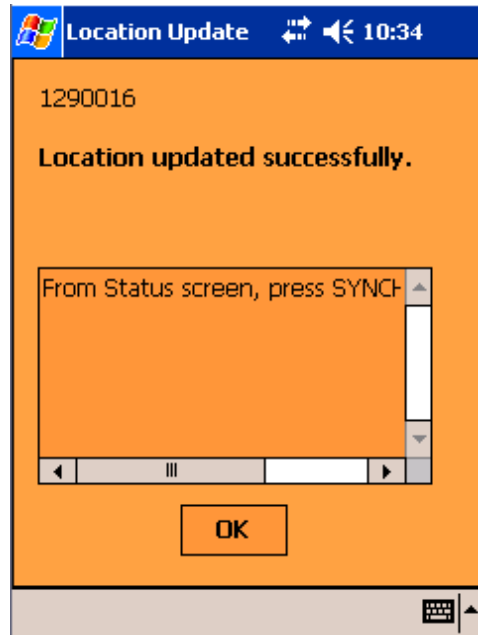


Figure 32

The message informs the user to move to the Status report screen and **TAP** the **SYNCH** button. *This updates the server with the new location of this item.*

- On the hand held the user will be informed of this by a message, “**Updating server...**”

Return Items to Storage

The **RETURN** button allows the user to pick up and return items to storage without a request being generated: **Figure 33**

This is optimal for users that are delivering items and are requested to pick up another item to return to storage.

AtPar TrackIT 7:00

Status Report for RHATT

Location [] Find Addr Exit

Dt From 08/10/05 To 08/15/05 Get AddItem

Request# [] Recip. []

Return LocUpdate Synch ☐ Multi

SendSelected SendAll P L U D Items

Location	Descr	Status	User1
----------	-------	--------	-------

Tools

Figure 33

TAP the **RETURN** button on the @Par TrackIT status report screen and you will see the following screen: **Figure 34**

Figure 34

The User has two options to search for an Item to Take and Return

- Search by ItemID
- Search by Serial number

The **default** is search by **Item ID**. If the user doesn't know the Item ID they can **toggle** or **TAP** on the **ItemID** label, and it will switch to **Serial#**.

The user can then **Scan** the Item's **serial number** or **enter** it manually.

The user will either enter the item id or scan the item id bar code and **TAP GET**.

This will download the item information onto the hand held with a status of **DELIVER**.

See the following screen: **Figure 35**

Return To Storage 11:00

ItemID Find

Loc: St.Loc: Status

Get SendSelected SendAll T R

ItemID	Serial No	Status	Locat
41		DELIVER	Offic

Figure 35

Highlight the item and the user will see the **T (Take)** and **R (Return)** buttons become enabled. See the following screen: **Figure 36**

Return To Storage 11:02

ItemID 41 Find

Loc: Office 1 St.Loc: Vault Status

Get SendSelected SendAll T R

ItemID	Serial No	Status	Locat
41		DELIVER	Offic

Figure 36

With the item highlighted, the user then **TAPs T**. This puts the item in **TAKE** status

- The **TAKE** status is similar to the **PICK** when delivering items on the @Par TrackIT status screen

See the following screen: **Figure 37**

ItemID	Serial No	Status	Location
41		TAKE	Office

Figure 37

Now that the user has the item to return, once they return to the storage location they **TAP R**.

See the following screen: **Figure 38**

ItemId	Serial No	Status	Locat
41		RETURN	Offic

Figure 38

When the user returns the item to it's location they either highlight the item and **TAP Send Selected** button, or **TAP** the **Send All** button and all items with a status of RETURN will be updated on the server.

After sending to the server, this information is removed from the hand held.

ADDING ITEMS TO INVENTORY

The **AddItem** button allows the user to add items to inventory without going through the server.

NOTE: This option is specifically used for **BOX** type items.

TAP AddItem and you will receive the following screen: **Figure 39**

Equipment Type

Item ID: 77

Item Description:

Storage Location:

Comments:

Destruction Date: 3/28/2006

Department-ID	Department-Name
<input type="checkbox"/> 28	Medical/Surgery
<input type="checkbox"/> 3	Orthopedics
<input type="checkbox"/> 4	Orthopedics

Figure 39

The user should see the Item ID is automatically generated.

- The user selects the applicable Departments this item is stored

The user selects Equipment Type, enters an Item Description, a Storage Location and Comments. If the Destruction date does not auto fill, the user should also enter a destruction date.

PRINT – This allows user to print a bar code label for the new item.

STATUS – Returns user to the **@Par TrackIT** status screen.

SEND – Based on User Parameters setting on the **@Par** server, this will automatically update server with new item information.

Delivering Multiple Location Ids to the same “Physical” Location

There are those times that items with different location ids are required to be delivered to the same Physical Location. Look at the screen shot below: **Figure 40**

Location	Descr	Status	User
Mem01	Memorial...	UNLOAD	GARYB
Mem02	Memorial...	UNLOAD	GARYB
WHSE1	14th St ...	UNLOAD	GARYB

Figure 40

In this example, you will see multiple locations that are preceded with “MEM” as the Location ID. Though each has a different location id they need to be delivered to the same physical address.

You might think you have to highlight each location, **TAP** on the **D** button, then obtain separate signatures. Well, you don't have to do that. The @Par TrackIT application is set up for the user to obtain a single signature for all these locations.

TAP Multi check box. You should see a check mark appear in this box.

Now **TAP** on each location id you want to deliver at this one physical location.

You should now see a screen like the one on the following page: **Figure 41**

AtPar TrackIT 5:55

Status Report for GARYB

Location [] Find Exit

Dt From 02/07/05 To 02/12/05 Get Addr

Request# [] Recip. []

☒ Multi

SendSelected SendAll P L U D Items

Location	Descr	Status	User
Mem01	Memorial...	UNLOAD	GARYB
Mem02	Memorial...	UNLOAD	GARYB
WHSE1	14th St ...	UNLOAD	GARYB

Tools []

Figure 41

Now **TAP D**.

This is the same process you went through earlier for a SINGLE delivery, but this time when the Recipient signs for the delivery, they will be signing for ALL the locations.

TAP Confirm after you obtain the signature and you are all set.

When you select the **SendSelected** or **SendAll** button from the @Par TrackIT status report screen, all items will be uploaded to the server.

Session Expiration

One last item of interest that you may run into from time to time: **Figure 42**

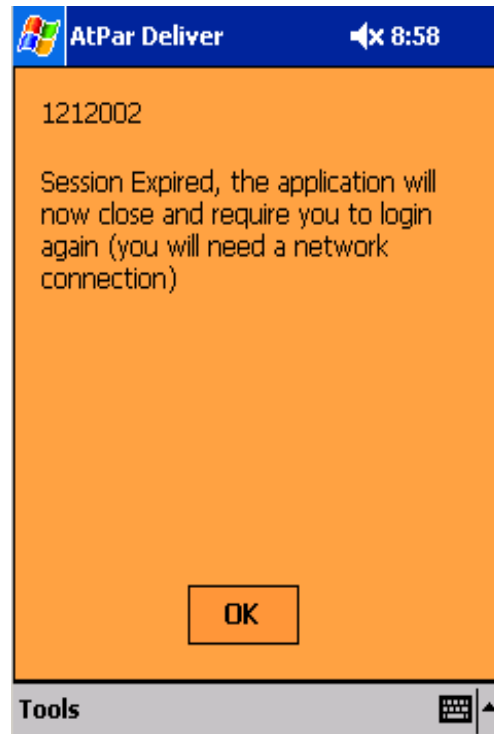


Figure 42

You could conceivably receive the error above. Don't be alarmed. You only need to TAP on the **OK** button, and Login again.

This message simply means that this hand held and @Par program has had a number of minutes with no activity. Generally, the Idle Time that is set up by the Functional Manager is 30 minutes.

This is in place for a couple reason;

1. If the session is left logged in, ANYONE could come to that hand held and start entering information etc. So it is set up for Security Purposes.
2. hand held/System Performance. We have found that by having an inactive session time out, the performance of ALL hand helds and System is increased.

If you find this error message occurring often, you need to discuss the possibility of having the Functional Manager increase the idle time.