



UPS Trackpad[®] 4.0

user guide

Documentation Version 1.0



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Welcome to UPS Trackpad

Congratulations on your decision to install UPS Trackpad®—a proven way to make your parcel tracking operations more efficient and cost effective. This guide will walk you through the implementation of UPS Trackpad and provide an ongoing reference for your success with the system.



Product Overview

UPS Trackpad uses state-of-the-art technology to track packages through your company, recording when a package is received, when it is delivered, and who signed for it. By reconciling receipt and delivery information about each parcel, it pinpoints where a package is in the delivery process. This information can even be made available at each desktop to minimize calls to your mail center. A variety of reports helps you identify misdirected or lost packages.

UPS Trackpad is easy to install, use, and maintain. This guide provides the technical information you'll need to configure both hardware and software components. You'll also learn how to customize UPS Trackpad for your organization.

This guide is intended for three kinds of users:

- The **project manager** or point person who is overseeing and defining objectives for the UPS Trackpad installation. This person should pay particular attention to the sections on What's New, Using UPS Trackpad Strategically and Tactically, System Components, The Power of Parcel Reports, Customizing Trackpad for Your Needs, Setting Up Your Company Directory, and Unique Numbers.
- The **UPS Trackpad user** responsible for tracking packages on a daily basis. Chapters of particular interest will include Inbounding Parcels Procedure, Delivering Parcels Procedure, Using Quick Search, Using Advanced Search, Using Handheld Personal Computers with Trackpad, and Restoring Settings to HPCs.
- The **systems or IT administrator** responsible for configuring the UPS Trackpad system. This person should pay close attention to chapters regarding Software Installation, Hardware Installation, UPS Trackpad Administrative Set Up, Custom Options, Email Notification, Using Local Lists, Device Setup/Options, Handheld Device Configuration, and Advanced Trackpad Configurations. The UPS Trackpad administrator, often a person assigned from the IT department, will need to be familiar with:
 - Microsoft Windows
 - Network file management
 - Microsoft SQL Server
 - Basic hardware installation
 - Basic software installation

WHAT'S NEW

UPS Trackpad 4.0 has several substantial upgrades.

- It allows twenty, instead of five, custom fields. In other words, Trackpad 4.0 is four times as customizable.
- Trackpad 4.0 also pushes more functionality into the handheld device. Now you can manage lists as well as filter carriers right from the HPC.

UPS Trackpad® 4.0 User Guide



- One of the most efficient enhancements for the HPC is “mobile auto-populate.” This is a fancy term that means data entry fields in the handheld will suggest completion for the user, speeding the inbound and delivery processes.
- The handheld also now enforces strict adherence to the company directory, so when T. Matthews and Tazania Matthews and TazMatt all sign for documents during the month, the handheld will record these entries in full compliance with the company directory record “Matthews, Tazania Marie; Sales Department; Sixth Floor.”
- Trackpad 4.0 also features a completely new menu, “Trackpad Handheld Setup.” This feature-rich section allows your organization to configure handhelds at a level of detail impossible with previous technology.

In summary, UPS Trackpad 4.0 keeps the robust functionality, scalability, and customization of previous versions, but adds even more power and control for the end user as well as the administrative user.



Using UPS Trackpad Strategically And Tactically

Your function within your entire organization is a critical one. UPS Trackpad will help you meet those critical function objectives like never before.

UPS Trackpad is a productivity tool that will enhance your organization's tracking operations. Many users find themselves pleasantly surprised at just how versatile Trackpad can be, and find themselves adjusting their operations to a new capacity and level of service. As you embark on this journey, you might consider setting service goals and financial objectives for your team and department so you can measure just how successful you are.

This chapter is provided because it is of interest to you, the forward-thinking professional logistics manager. It is meant to assist you with the following:

- Developing an ROI for mailroom and logistics functions that will be of interest to senior management
- Setting and attain productivity goals
- Ascertaining the best configuration of UPS Trackpad's versatile system
- Justifying upgrades as necessary to the Trackpad system

PLANNING YOUR UPS TRACKPAD INSTALLATION

Your UPS PSI representative will work closely with you to determine the best installation for your needs. There are several key issues to keep in mind concern your existing IT infrastructure. Are you in a networked environment? If so, you'll want to take advantage of a networked installation of UPS Trackpad. Are you in a standalone environment? If so, extending your reach with multiple handheld devices might be an option. Do you wish to track two completely separate items—such as art on the executive level, trade show or display materials, or other sorts of inventory? If so, you may think about two separate Trackpad installations—a standalone for the special function, and one for your mailroom operations. You might also be able to blend items you wish to track.

Open your organization to the possibilities by discussing your new tracking ability with other department managers and visionaries. You may be surprised at some of the tracking needs and requests that haven't come to light before, simply because there has been no robust tracking solution in place before. UPS Trackpad, since it has the ability to generate barcodes, can be used to track just about anything coming in and out of your operation.

In summary, as you plan your installation, consider these steps:

1. Meet with other managers and visionaries regarding items your organization needs to track in a simple, convenient way.
2. Involve your IT or technology group to leverage the power of UPS Trackpad across your network or in your server environment. Provide copies of this administration manual to the IT group to help them understand the capabilities of UPS Trackpad.



3. Write down the results of these meetings in a formalized "Mission Plan" for UPS Trackpad.

MEASURING YOUR SUCCESS

UPS Trackpad can accelerate your parcel-related processes. To attain an objective view of how much more successful you are in meeting these functions, it is helpful to measure your operation before and after using UPS Trackpad. Even if you just jot down these numbers, it will give you something to measure against after you are running a fully functional installation of UPS Trackpad with trained users.

Consider measuring key metrics like the following:

1. How many packages are you receiving daily/weekly?
2. How many packages are you sending daily/weekly?
3. How many calls do you receive on a daily or weekly basis about tracking lost packages?
4. How many "internal customer" support calls regarding packages do you handle in a week (not including lost packages)?
5. How many times do you send people out for pick ups?
6. How long is the average pick up trip?
7. How many times do you send people out for deliveries?
8. How long is the average delivery route in terms of number of deliveries, and number of hours or minutes?
9. How long does it take for a parcel to enter your system and move from "received" to "delivered" status?
10. How long does it take for a parcel to leave your system? (In other words, be placed for pick up or drop off to your mailroom operation, and actually leave your facility.)
11. How many person-hours does it take to process incoming and outgoing parcels? (Not counting inventory tasks, handling email or voicemail, or other functions—simply the handling of receiving and delivering packages.)

These suggested measurements are meant merely as a guide to help you think about the metrics that will make sense in your organization. For example, you may think in terms of hourly volume—or perhaps weekly volume makes more sense. You also may do pick ups and deliveries on the same route, in which case, your measurements would reflect that.

Once you've chosen the numbers that make sense to you, measure them at "ground zero" before you have installed UPS Trackpad. Then, measure again approximately three months later, and perhaps annually. You will find your original numbers become invaluable as a yardstick to measure against as you develop your parcel tracking and management systems.



TRAINING ON UPS TRACKPAD

Intuitive user menus are one of the best features of UPS Trackpad. However, even though UPS Trackpad is easy to use, we recommend that you formalize a training program so that your staff use the system efficiently and well. The following outline is provided as a basic training guide for you to customize for your own needs.

1. Provide users a link to UPS Trackpad online references so they may read help chapters as needed. You may also consider printing out a copy of this user guide and placing it in a binder accessible to all your users.
2. Conduct training on the desktop first. Take your users through:
 - a. Inbounding a parcel.
 - b. Delivering a parcel.
 - c. Using Quick Search to find a parcel.
 - d. Using Advanced Search to find a parcel.
 - e. Running standard parcel reports, such as an Exception Report.
 - f. Using the Help menu.
3. Conduct training on the handheld after you've conducted desktop training. Consider verifying that your user knows how to:
 - a. Inbound a parcel on the HPC.
 - b. Deliver a parcel on the HPC.
 - c. Instruct someone in signing for a parcel.
 - d. Soft-reset the HPC.
4. Additionally, you may wish to communicate a few of your organization's policies when you train on Trackpad. Some of the policies your users may need to know include:
 - a. How to handle an exception to a list—in other words, what happens when they need to deliver to someone not in the list? How do they send revised information back to the system administrator?
 - b. How to handle a request to track a package internally.
 - c. When to (and how to) generate a barcode for a package that does not already have a barcode.
 - d. Your policies on HPC maintenance, battery charging, and cleaning.
 - e. How to let you know when an HPC needs substantial maintenance, such as a hard reset or a re-installation of applications.



MEETING GROWING NEEDS

Once you see the bottom-line savings delivered by UPS Trackpad, you may wish to expand your operation. This could be as simple as adding a few barcode printers, or using UPS Trackpad to also manage a non-package asset for your organization. Here are some things to keep in mind as you grow and your needs evolve:

- Your UPS Professional Services representative is a knowledgeable logistics partner and has access to many tools developed by UPS for global logistics, supply chain management, warehouse engineering, packaging, and transportation. Reach out to your UPS PSI advocate for information on proven applications and resources you can use.
- UPS Trackpad has many hardware components and accessories available to enhance your system. Ask your UPS PSI representative about items that are currently available.
- UPS Trackpad can be extended through UPS Delivery Link and UPS Trackpad Online, separate software applications developed by UPS.

For more information about tools available to help you, check out the UPS Professional Services Web site, <http://www.ups-psi.com>.



Support

Support for UPS Trackpad is available in a variety of convenient ways.

Online Support: www.UPSTrackpad.com

Telephone Support: Call 800-733-7592 between 9 a.m. and 8 p.m. EST.

Email Support: support@a2btracking.com.

For more assistance, call your UPS Professional Services representative.



Using UPS Trackpad – The User Menus

If you're a Trackpad user—someone who wants to actually start tracking and delivering packages—this section is for you. Although Trackpad does have a detailed and customized setup section, when it comes to the daily use of the system, Trackpad is admirably straightforward.

If you're new to using Trackpad, first acquaint yourself with the main user menu (see Figure 1). You will notice six large buttons to the left of the menu screen. They are:

- Inbound Parcels
- Delivery Parcels
- Quick Search
- Advanced Search
- Parcel Reports
- UPS Delivery Link Import

We will discuss these menus in detail in the next sections.

Other elements of the main user screen you should note include the small blue **Setup** button. This is a password protected area that your designated Trackpad administrator uses to configure your system and proprietary information. Below this button are two small text links—**Exit** and **Help**. Click **Exit** to end the Trackpad program. Click **Help** to access user guide material about how to run Trackpad.

Above the buttons and to the left is a square, tan section of the user screen that tells you which version of Trackpad you are running, and in which configuration you are running it (such as standalone, or networked, or SQL). The date and time are also present for your convenience.

Across the top of the screen, the status area defaults to a moving bar, which means UPS Trackpad is ready to receive parcels. As you conduct parcel transactions, you will see updates and status messages in this area.

Finally, in the top right corner of your screen, a small gray square allows you to minimize UPS Trackpad, keeping the program open and active, but removing it from your full screen. It will be in your system tray, where you can click on it to restore it to full screen size.

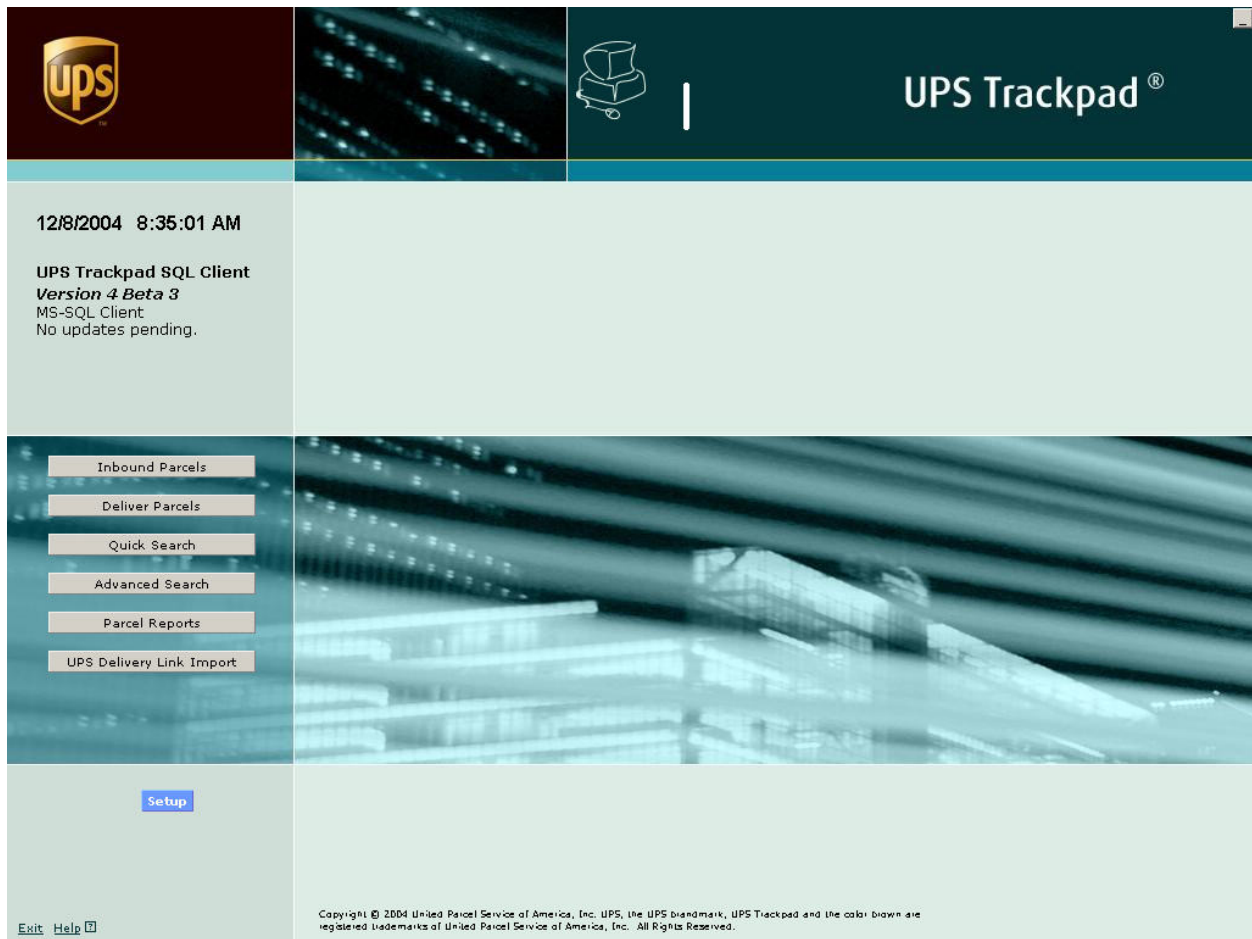


Figure 1 – UPS Trackpad's Main User Screen



Inbounding Parcels Procedure

DESKTOP INBOUNDING

To receive a parcel into your system, which UPS Trackpad refers to as “inbounding,” click the **Inbound Parcels** button. If you have a scanner set up, you can scan the barcode and it will populate the tracking number for you. If you do not have a scanner, enter the tracking number in the top field. You could also auto generate a number. You have the option to print a label, if label printing is set up, in the event the item you are tracking doesn’t already have a barcode. As you will see, this menu is intuitive. You simply fill in the blanks, and click **Finish** when you are done entering the information requested.

HANDHELD INBOUNDING

Point the beam of infrared light at the barcode of the item you wish to receive. Barcode scanning works best if the beam of red light goes straight across the barcode, perpendicular to it. If you do not have a barcode to scan, you can either use the Inbound button on the desktop to create one, or you can enter a reference number manually. Enter the information requested, clicking **add** to confirm your data entry, and **OK** when you are finished. If your administrator has set up an **inbound directory** and has **autopopulate** turned on, you may find many of the fields are already entered for you.



Figure 2 - Inbounding Using Handheld



Reference

Auto

Shipping Carrier Service Name Vendor

Key Field

EMAIL

Custom Field 3

Custom Field 6

Custom Field 7

Options

parcel Label

(Print label)

Send e-mail

+ Add Parcel Enter Receive parcel information. ? Help ✓ Finish

Figure 3 – Desktop Inbound Information Screen - Yours will vary.



Delivering Parcels Procedure

Reference

Custom 11

Profit Center

Options

Send e-mail

Supervisor

Department

+ Add Parcel

Enter Deliver parcel information.

? Help

✓ Finish

Figure 4 - Deliver Parcels Screen. Yours will vary.

To deliver a parcel, press the Deliver button. Scan the parcel's barcode or enter it by hand. Fill in any requested information. The requested information will vary depending on how your administrator has set up your system. Then press **Finish**.

Depending on the preferences set by your administrator, UPS Trackpad may then ask you for a signature from the recipient. Input the recipient's name (either by hand or using the list of recipients provided for you), and then ask them to sign for the package if necessary. A small triangular tab at the bottom left of the signature panel erases the signature, in case the person wants to redo the signature. Click **OK** to finalize the delivery.



Figure 5 - Delivering Parcels Using Handheld



Using Quick Search

The quick search button provides a fast way to look through recently recorded transactions and pull up details. A drop down menu at the top of the menu contains the last several tracking numbers. You can also type or use a wildcard character—the asterisk (*)—to locate a tracking number.

When you pull up a tracking number, you will see all the detail in the Trackpad Central System (TCS) regarding that transaction. If it is a delivery, you'll even see the signature, if signatures are required in your organization.

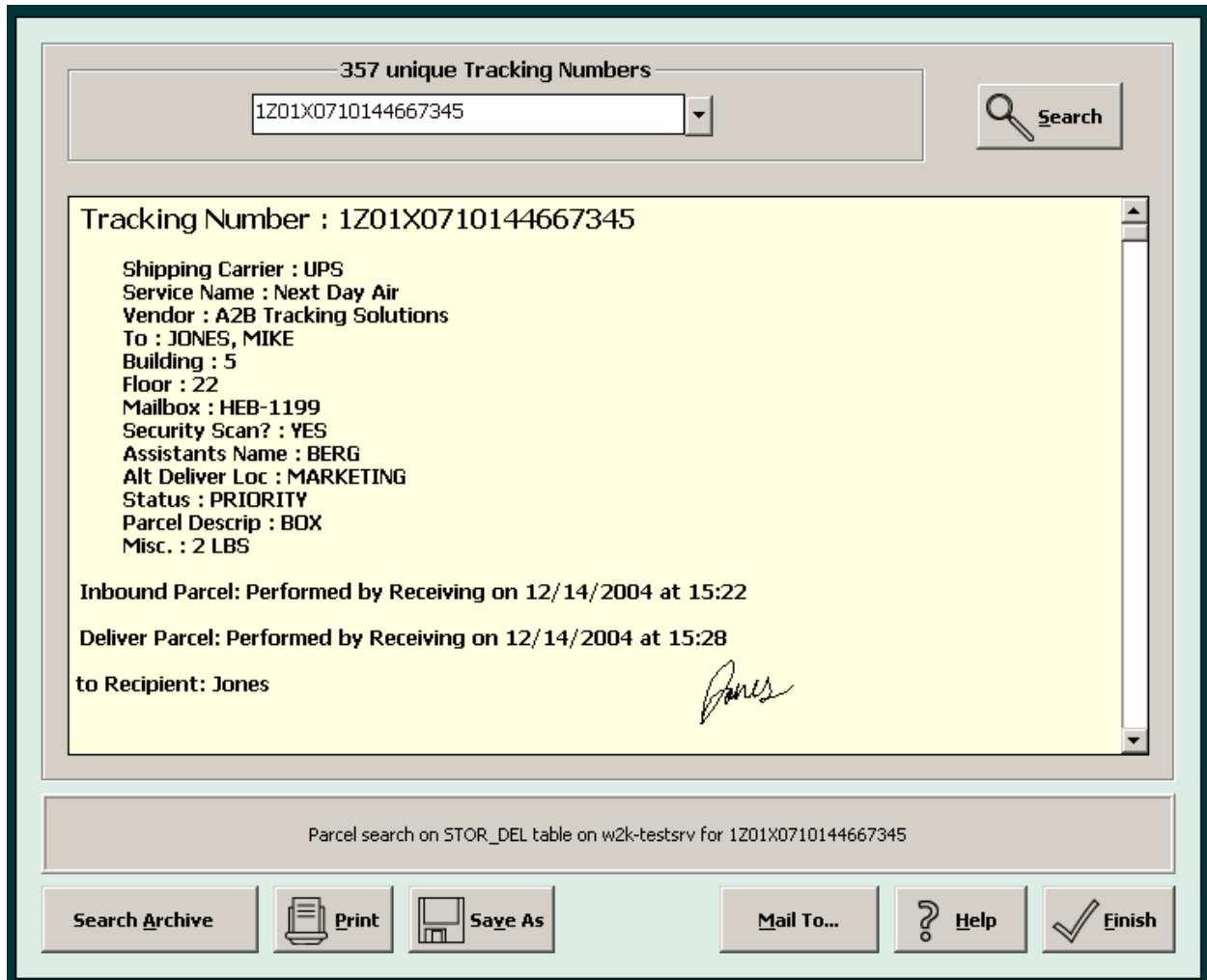


Figure 6 - Quick Search Menu Results



Using Advanced Search

Advanced search allows you to search by as many parameters as UPS Trackpad tracks for you. It is an extremely robust search tool. You may search by:

- Date
- Tracking Number
- Carrier
- Vendor
- Handheld ID number
- Trackpad desktop number
- Recipient
- Service level
- Any arrangement of custom fields you have set up

To sort by the custom fields, you'll need to access them by clicking on tabs 1-4 at the right of the screen. Inbound fields are numbered 1-10. Delivery fields are numbered 11 through 20.

- Tab 1 contains inbound custom fields 1-5;
- Tab 2 contains inbound custom fields 5-10;
- Tab 3 contains delivery fields 11-15;
- Tab 4 contains delivery custom fields 16-20.

Like Quick Search, Advanced Search supports the use of a wildcard character—the asterisk (*)—to help you define broad search parameters. You may use an * in any field.



<p>Date Selection</p> <p><input checked="" type="radio"/> Today Only FROM 00:00 TO 23:59</p> <p><input type="radio"/> All Dates (12/01/2004 to 12/09/2004)</p> <p><input type="radio"/> Specific Date Or Range Of Dates</p> <p> / / to / /</p>		<p>Search For</p> <p>Reference <input type="text"/></p> <p>Shipping Carrier : <input type="text"/> Service Name : <input type="text"/></p> <p>Vendor : <input type="text"/></p> <p>Key Field : <input type="text"/> Set 1</p> <p>EMAIL : <input type="text"/> Set 2</p> <p>Custom Field 3 : <input type="text"/> Set 3</p> <p>Recipient : <input type="text"/> Set 4</p> <p>User / Desk : <input type="text"/> ID # : <input type="text"/></p>	
<p>Parcel Selection</p> <p><input checked="" type="radio"/> Every Parcel (39 numbers)</p> <p><input type="radio"/> Only records with no Deliver performed</p> <p><input type="radio"/> Only records having a Deliver entry</p>			
<p>Sort By</p> <p><input checked="" type="radio"/> Reference <input type="radio"/> Recipient</p> <p><input type="radio"/> Date & Time <input type="radio"/> Key Field</p> <p><input type="radio"/> EMAIL <input type="radio"/> Custom Field 3</p> <p><input type="radio"/> Shipping Carrier <input type="radio"/> Service Name</p> <p><input type="radio"/> Vendor</p>			
<p>Perform an Advanced Search by filling in the necessary information. The current search will be performed on: STOR_DEL table on GARSEWKS1497b</p>			
View Records	Print Manifest	Search Archive	Clear
	Help	Finish	

Figure 7 - Advanced Search Menu



The Power of Parcel Reports

Parcel reports allow you to generate several reports at the touch of a button. You are able to choose the range of dates you wish to view reports regarding. For example, this makes it easy to compare this November's volume with last November's. You can print, save, or email the reports that Trackpad generates.

EXCEPTION REPORT

Helps you pinpoint items that have been delivered but not received, or received and not delivered.

SHIPPING CARRIER VOLUME REPORT

Shows you which carriers are receiving the most business and thus assists you in negotiating volume-based rates.

DIAD DELIVERY REPORT

Helps you track the volume of inbound material flowing from your UPS driver through an installation of Delivery Link software. Your organization must be using Delivery Link and the import must be set up in **Device/Setup** Options in order for this to work.

PRODUCTIVITY REPORT

Shows your delivery speed in terms of Fast, Average, and Slow settings that you set yourself based on your own organization's internal metrics.

USER REPORT

Shows exceptions and average delivery times for each registered handheld user. This can help your organization develop internal efficiencies and metrics.

ROUTE REPORT

Helps you review the efficiencies of various routes over time. You have the option of choosing how far back in time to review your routing records as defined by unique **handheld ID numbers**. You may choose to search any database of records in the system (including archives and histories).

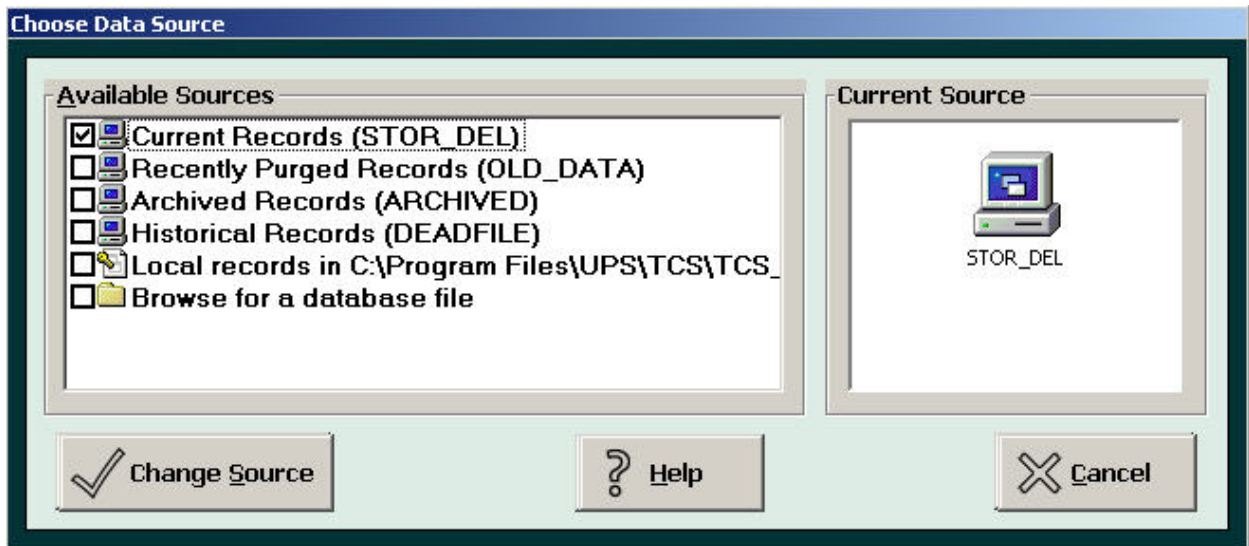


Figure 8 - Route Report Record Selection Menu

DIRECTORY LISTING TEXT

This button allows you to see the current directory UPS Trackpad is using.



Date Selection

Today Only

All Dates (12/01/2004 to 12/09/2004)

Specific Date Or Range Of Dates:

// / to // /

Current Database

STOR_DEL table on GARSEWKS1497b

Search Archive

Choose Report

Exception Report

Shipping Carrier Volume

DIAD Delivery Report

Productivity Report

User Report

Trackpad Route Report

Directory listing.txt

To view one of UPS Trackpad's built in reports, please select a date and the type of report you wish to see.

Clear **? Help** **✓ Finish**

Figure 9 - Parcel Reports Menu



UPS Delivery Link

Pressing the **UPS Delivery Link** button tells UPS Trackpad to search for the Delivery Link file containing UPS package detail. When it finds a new file, it automatically imports the information if it has been set up to do so. If you wish to use this feature, contact your administrator and have them set up the Delivery Link connection.

This button requires your organization to be using UPS Delivery Link, which is standalone software that automatically downloads your organization's parcel records from the DIAD computer carried by your UPS driver.

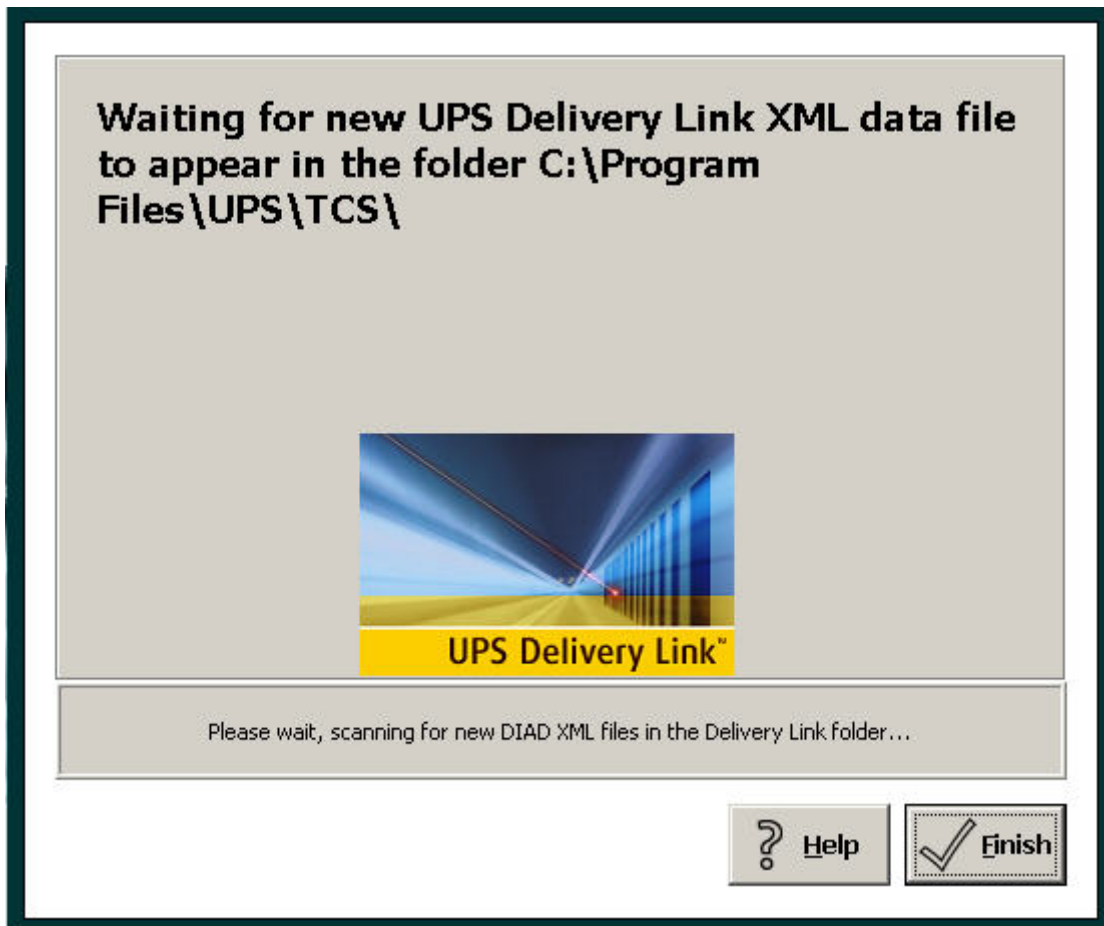


Figure 10 - UPS Delivery Link Import Status Message



Using Handheld Personal Computers (HPCs) With UPS Trackpad

The full benefits of the UPS Trackpad system become apparent when you deploy handheld personal computers in your organization to track parcels. Handheld personal computers (HPCs) are as mobile as your workforce. Because packages can be signed for on the HPC and also received, your staff can pick up and deliver the same route, streamlining your workflows.

Trackpad runs on the HPCs with a unified interface, meaning all of the screens share similar appearances and behaviors. Even if you run different models of HPCs on the same system, your users can be trained to use Trackpad on the HPC in the same manner. Plus, the functions available to you on the handheld are also presented in a similar layout on the desktop—so if your users learn one, they will quickly pick up the other.

HPCs are an extension of your Trackpad system. Once all of your Trackpad hardware and software has been configured on your desktop PC (and possibly your network and/or server as well) you are ready to install Trackpad on your handheld personal computers.

This chapter will acquaint you with the basic functions and features of HPCs and assist you in installing Trackpad on them. As new updates and releases for specific HPC devices are available, they are posted at <http://www.upstrackpad.com>.

PREPARE THE HPC

CHARGE THE BATTERY. Unwrap the products and verify you have all the parts you need. Make sure your battery is fully charged before proceeding. It can take up to five hours to fully charge the battery.

REFER TO THE QUICK REFERENCE GUIDE for instructions on calibrating your screen. Calibrate your screen.

CONNECT YOUR HARDWARE TO YOUR DESKTOP

Once your battery is fully charged and your screen is calibrated, connect the HPC to your desktop computer. There are two ways to choose to connect your HPC to your computer for the installation and configuration of Trackpad on the portable computer. You may choose either of the following two methods:

- a. Insert the serial charging cable firmly into the bottom of the HPC. Insert the other end of the cable, which is a nine-pin serial connector, into your PC. (Refer to your PC's user documentation if you have trouble locating a nine-pin serial port.) Evenly tighten the two screws to finger-tightness so ensure the best communication between the HPC and your desktop PC.

OR

- b. Using the cradle that came with your portable computer, firmly connect the nine-pin adaptor on the cradle to a serial port on your PC. Place the cradle base on a



firm, flat surface within easy reach of your keyboard. Rest the HPC in the cradle evenly, making sure it connects securely with the cradle.

INSTALL UPS TRACKPAD FOR HPC

Installing UPS Trackpad for HPC varies by the model of handheld personal computer you have chosen for your organization. To complete this step, refer to the installation guide that came with your HPC, or download relevant material from www.UPSTrackpad.com.

BASIC HPC OPERATIONS

HPC screens are touch sensitive. Use the stylus to enter information on the screen and tap the buttons.

- To tap a button on the screen, place the tip of the stylus on the screen, gently apply pressure, and then lift the stylus off the screen. Do not apply too much pressure to the screen.
- When asking someone to sign the signature pad on your HPC, remind them to press lightly and make sure that they do not use a regular ink pen. Only use a stylus.
- UPS Trackpad does not delete any information without first asking you for confirmation. If you click the **Abort** Button after entering partial information, you'll be prompted to confirm that you want to delete the data. You'll be able to cancel the delete and continue what you were doing, or delete the data.

The HPC uses three basic tones to indicate certain actions. A 'chime' or 'ping' indicates success, such as when adding a parcel to a list. A low 'chirp' indicates that the action you tried to perform is invalid, such as adding the same number twice.

When the HPC is waiting for you to enter data, it displays a rectangular data box. The cursor will automatically be placed in the first input field on the screen. If there are multiple input fields, you can move the cursor by tapping the desired field.

Your UPS Trackpad system administrator will configure your system so that data you enter over and over again can be populated from a company directory. (See the section on Creating Directories for more information.)

- As you begin to type in the entry, **Smart Search** will automatically search for and retrieve information that matches the data you have entered. For instance, as you begin to type a name in the recipient field, indicating the person who is signing for the parcel, all matching entries will be displayed in a drop-down list. As you type additional letters, the list is narrowed down.
- To select one of the entries in the list, simply highlight the entry and tap **OK**.
- If the data you are Looking for is not in the list, enter it as you would normally. To select one of the entries in the list, highlight the entry and tap **OK**.
- To remove a parcel from the list, tap the **Delete** Button.



SETTING OPTIONS

Administrative options can be enabled for transferring configuration files, lists, and other information in user mode. To configure the precise information transferred, visit the [Trackpad Handheld Setup](#) button from the administrative setup screen.

THE MAIN MENU

The **Main Menu** is the first screen displayed when you start the HPC. In addition to providing access to Inbound and Deliver parcels and Transfer data to the desktop, the **Main Menu** also provides you with useful information about the HPC.

You can see the person the version of HPC software you are running right under the UPS Trackpad logo. Below that, text indicates to whom the Trackpad is registered. (In this image, the Trackpad is unregistered.) Your location and company name are also displayed in the upper portion of the screen, alongside the current date and time.

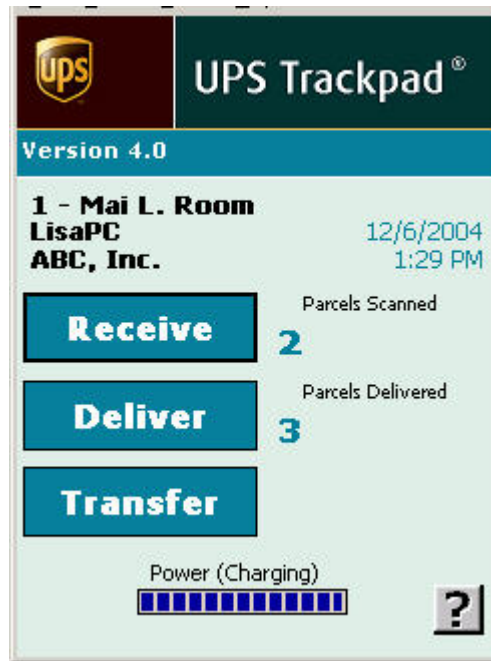


Figure 11 - UPSTrackpad HPC Software Main Screen

UPS TRACKPAD HPC SOFTWARE BUTTONS

Please refer to the UPS Trackpad HPC Software Main Screen as we review the software buttons.

Inbound - Tap this button to accept new parcels into your system. To the right of the button is the number of incoming parcels you've already scanned in this session.

Delivery – Tap this button to finalize a parcel delivery to its final destination. To the right of the button is the number of parcels you've delivered in this session.

Transfer – Tap this button to transfer data to the central Trackpad system. Data should be transferred each time you return to your mail center. Completing a successful transfer resets the inbound and delivery numbers to zero.



Time and Date – The clock on the HPC is reset automatically when you transfer data to the desktop so you never have to set the time.

Power Gauge - This gauge indicates the condition of the HPC's rechargeable batteries. As batteries age, they hold a charge for shorter periods of time. If the power level drops to 25 percent or less, you should recharge the batteries.

? – This button brings up the help system on your device.

CHOOSING THE HPC'S OPERATING ENVIRONMENT

The HPC needs to know which operating system is running on the desktop before transferring data. To select the operating system, tap the **Help** Button on the **Main Menu** to bring up the Help screen. The Help button is indicated by an interrogation symbol (?). At the prompt:

-DATA TRANSFER-

Tap 'Yes' to change

Tap yes. You will have three choices for your transfer setting:

1. IR to Windows 2000 or XP
2. IR to Windows 98 or NT
3. Serial Cradle Connection Only

Choose the setting most appropriate to your organization. Only the Symbol 8800 series allows serial data connection. Tap **Set**.

INBOUND

As packages and envelopes are received, the inbound process lets you record the receipt of these items either by scanning them or by key entering a tracking number. You can also enter additional information about the items in **custom fields**, should it be required at your location.

In most cases, you will scan the bar code on the shipping company's label to enter the tracking number used by UPS Trackpad. If the bar code is unreadable or missing, you can generate a unique tracking number using the Auto-Populate feature (available only on the desktop) and then printing a label to affix to the package to scan at delivery. You can also key the number using the on-screen keyboard. Once you have typed in the number, tap **Add** to add it to the list of parcels being processed.

TO INBOUND AN ITEM WITH AN HPC

At the HPC **Main Menu**, tap the **Inbound** Button.



Enter the tracking number for the inbound parcel, either by scanning the bar code on the shipping label or keying in the number using the HPC keyboard and stylus.

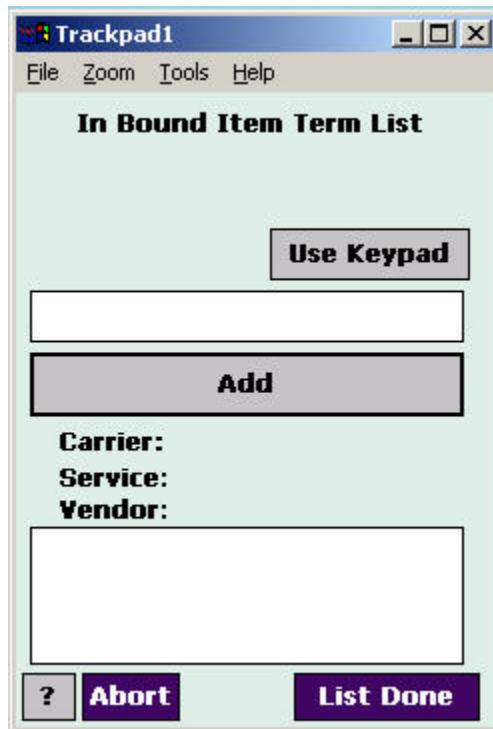


Figure 12 – UPS Trackpad HPC Inbound Screen

Tap **Add** to add it to the list.

If you accidentally try to enter the same parcel number twice, the HPC alerts you with a chirp and does not add the duplicate entry.

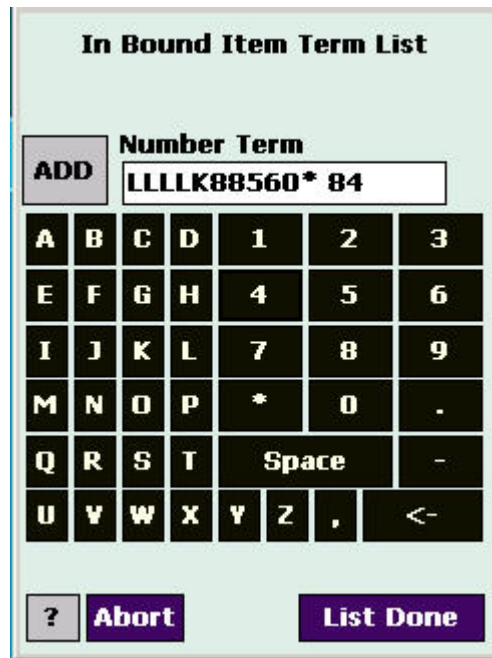


Figure 13 - Onscreen Keypad

If you need to edit or delete a single item, you must first select it. If the onscreen keyboard is displayed, first tap **Hide Keys** to display the list of parcels you've entered. Double tap on the Tracking Number in the list to select it.

Once you have selected an item, you will be presented with text boxes into which you may enter item detail. To enter detail, simply tap on the desired field and then key or scan the information.

If you wish to remove this item from the list, tap **Delete**. When you are done entering data, tap OK to return to the main list.

Once you have entered all of the items and any special data, tap **List Done**.

If no fields have been set to capture data for the entire list, the HPC saves the data and returns to the HPC Main Menu. However, if fields are set to capture data about the list, then the Inbound Information screen appears.

INBOUND INFORMATION SCREEN

The Inbound Information screen displays how many items are in the list and provides one or more boxes to enter custom data. To enter the data, tap on the appropriate box and key or scan the data. You may also select a choice from a list by tapping the button beside the field (if you have turned on autopopulate for this custom field in Trackpad **Setup**.)



In Bound Item Term List

Custom1

Custom4

Custom5

Custom6

Custom8

? Delete > Ok

Figure 14 - Inbound Information Screen

If you need to return to the item list for any reason, double tap the tracking number you wish to edit. Once you are done, tap **OK** to save the data and return to the HPC Main Menu.

DELIVER

The **Deliver** function is used to capture delivery information. In addition to the Recipient's last name and signature, you can also capture additional information, depending on your company's requirements. The entry screens for **Deliver** are very similar to those used for **Inbound**.

TO DELIVER AN ITEM WITH AN HPC

Tap the **Deliver** button on the HPC main menu.

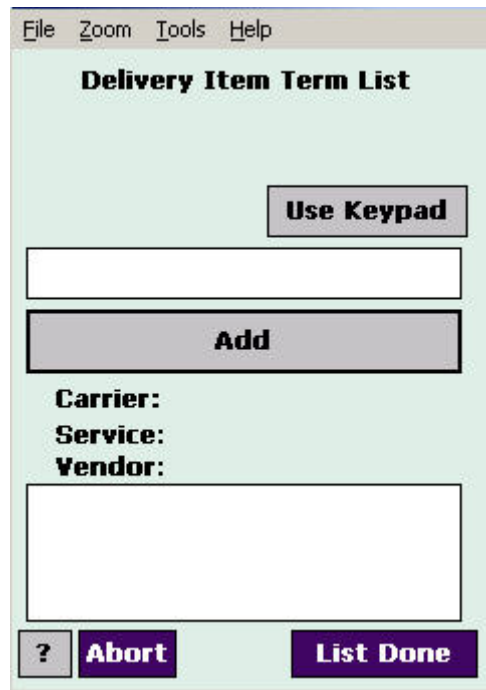


Figure 15 – UPS Trackpad HPC Deliver Menu

Parcel tracking is accomplished through unique tracking numbers. Just as in the Inbound process, when you deliver a parcel you enter the tracking number by scanning the bar code label. The tracking number is read and automatically added to the list of what you're delivering to this location. You can also key in the tracking number using the on-screen keyboard and tap **Add** to add it to the list. (To access the on-screen keyboard, tap the **Use Keypad** button.)

- If custom fields are set to autopopulate (in the Custom Options menu within the setup section of UPS Trackpad), you will enter data in the custom fields displayed. Data can be scanned, entered on the keypad, or tapped from the list presented, depending on the field.
- If you enter the same parcel number twice, the HPC alerts you with a chirp and does not add the duplicate entry to the list.
- To cancel all the items on your Deliver list, tap the **Abort** button.

To enter custom data when fields are not set to autopopulate, or to edit or delete an item, you must first select it. (If the keyboard is on your screen, first tap **Hide Keys** to return to the previous screen for the list.) Double tap on the number in the list to select it.

- Once selected, any additional fields your system administrator has defined will be available to edit. Tap the box for the field you want to enter or edit and then key or scan the information.
- To remove an item from the list, tap **Delete**.
- When you are finished entering data, tap **OK** to return to the item list.



Once you have entered all of the items to be delivered and any special data needed, tap **List Done**.

The Deliver Information screen displays how many items are in the item list and provides a box for the Recipient's name. If additional data is required by your company, additional boxes are provided. You can enter the Recipient's name after you have obtained the signature if you wish.

- To enter the data, tap on the appropriate box and key or scan it. If you have previously entered data for one of these fields, you may also select a choice by tapping on a field label for a drop-down list.
- To remove an item from the detail list, select it and then tap the **Delete** button. If you need to return to the item list for any reason, tap Edit.
- Once you are done, tap **Sign** to proceed to the Delivery Summary screen.

DELIVERY SUMMARY

The **Delivery Summary** screen lists all of the items for this delivery, plus the name of the recipient and any special delivery data. Ask the Recipient to sign their name in the signature pad on the screen. **Note:** Remind the Recipient to press very lightly using the stylus when signing their name.

If the recipient needs to redo their signature, tap on the dog-eared, lower-left corner of the signature pad. The signature will be deleted, and the Recipient can sign again.



Figure 16 - Delivery Signature Screen

Once you have obtained the signature, tap **OK**. This saves the delivery data and returns you to the HPC **Main Menu**.



If you have not yet entered the recipient's name during a delivery operation, once the recipient signs, the Delivery Information screen will appear. The **Deliver Information** screen displays how many items are in the item list and provides a box for the Recipient's name. If additional data is required by your company, additional boxes are provided.

You will now be able to enter the name of the Recipient.

If you need to return to the item list or the **Delivery Information** screen, tap **Edit**. Note that by returning to the item list, the *recipient's signature is erased if they have already signed*. You can have them resign.

TRANSFER

After you have finished the Inbound or Deliver process and returned to the mail center, transfer the data to the UPS Trackpad main database.

To transfer information from the HPC to the central UPS Trackpad system, locate your handheld unit where it can communicate with an infrared device (or place it in its serial cradle). Open UPS Trackpad on your desktop computer and make sure you are in user mode. At the HPC **Main Menu**, tap the **Transfer** button.

By default, you do not receive transfer options in user mode. You may be prompted to update the handheld's registration if the Trackpad administrator has set that option. To change the user name associated with the HPC, click **Register Handheld**. Otherwise, click **Continue**.

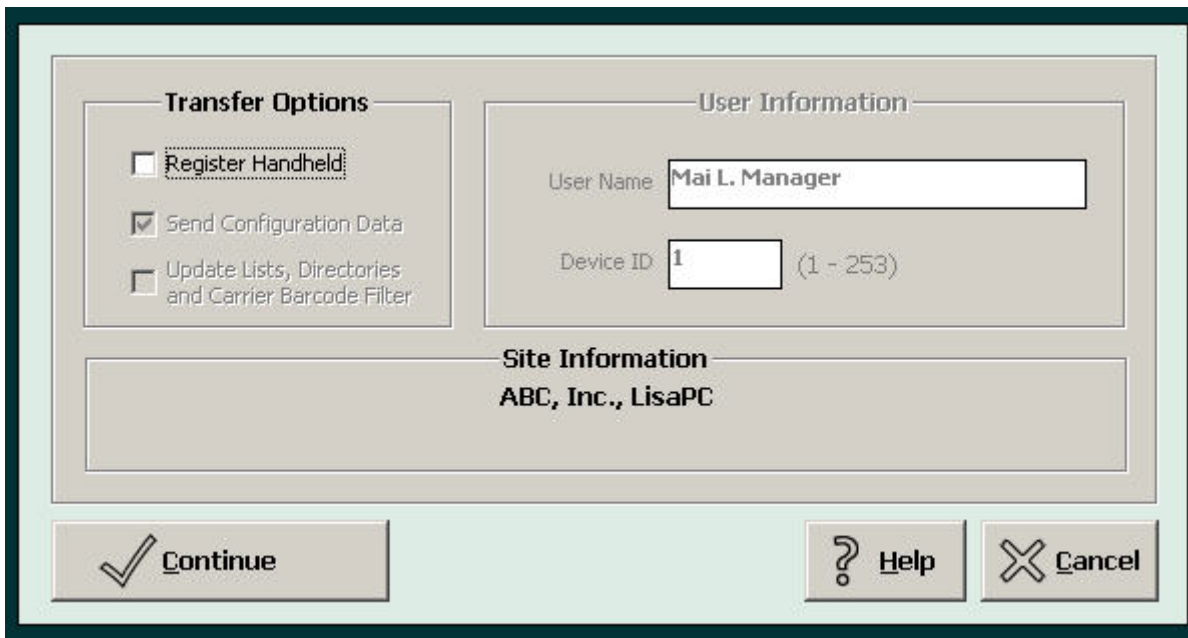


Figure 17 - Transfer Options Menu

The transfer begins automatically when the link has been established. Both the HPC and the UPS Trackpad desktop display the progress of the transfer. **Note:** If a DIAD download is



being performed, the desktop waits until it has completed the task before it begins to transfer data from the HPC.

On the handheld, you will see messaging apprising you on the progress of the transfer.

From your Trackpad desktop, you will also see messaging in the upper right hand corner of the user screen letting you know the status of the data transfer.



Figure 18 - Desktop Transfer Status

You will also see a progress menu on your desktop letting you know what is being transferred.

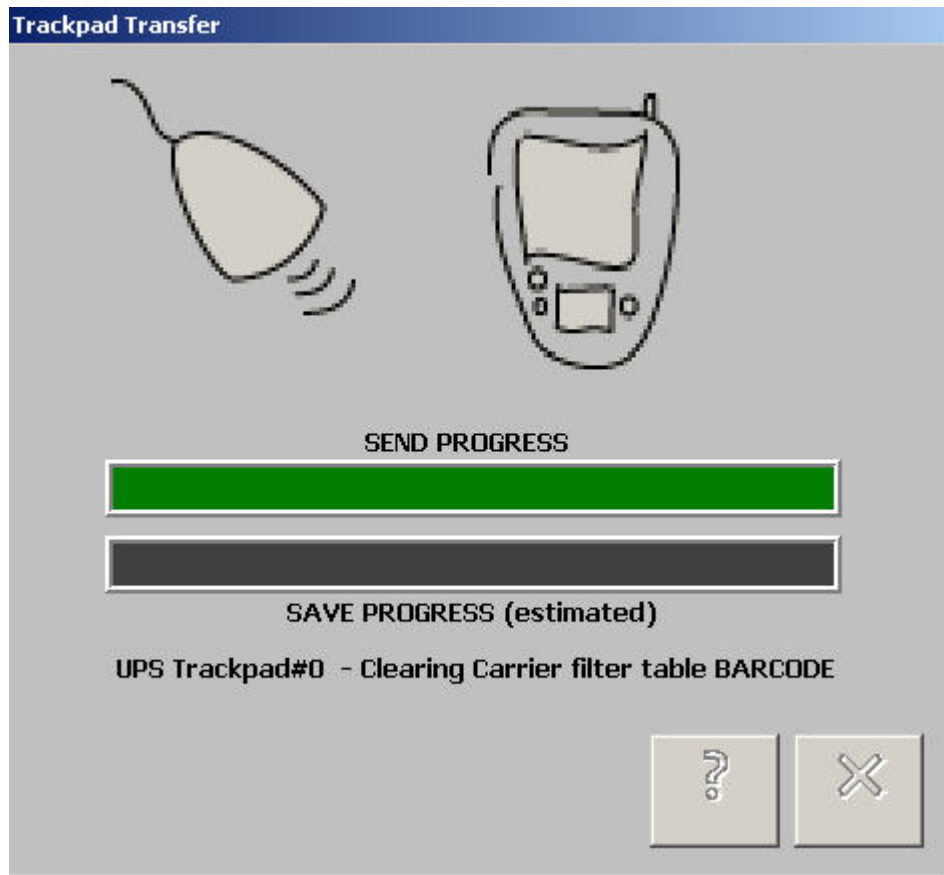


Figure 19 - Desktop Transfer Progress Screen

For networked and server installations of Trackpad, if you have set up a company directory with current email addresses, UPS Trackpad can automatically generates email notifications



to those who have had packages delivered when you perform the transfer. (See the **Email Notification** within the administrative setup screen of Trackpad to configure this setting.)



Figure 20 - Email Update Notification During Transfer

Once the transfer is complete, the HPC will beep three times. You will see the numbers associated with **Inbound** and **Deliver** are now zero.

If for some reason you need to abort the transfer, tap **Cancel**.

CHARGING UPS TRACKPAD BATTERIES

Your UPS Trackpad HPC is equipped with rechargeable batteries. Battery life varies depending upon how many items you record, how many are scanned, etc. You should get at least eight hours of use between charges.

Set up a charging protocol for your team so that your HPCs are charged regularly, but not constantly. To maximize the life of the rechargeable battery, leave the HPC out of the charger until the battery charge gets low. Operations with low volume may not need to charge the HPC daily.

CLEANING THE HPC

To ensure that your HPC operates at peak performance, it is very important to keep the screen as clean as possible. Dust, dirt and fingerprints will make the screen less readable. Furthermore, as people sign their name, any dirt on the screen will be rubbed against it and can scratch the surface.

To clean the HPC screen, use either a soft cloth and glass cleaner or a pre-moistened anti-static CRT wipe. If you are using glass cleaner, apply a small amount to the cloth and then gently wipe the screen. Do not spray glass cleaner directly onto the HPC screen.

Note: Never use any harsh chemicals or abrasives to clean your HPC.

HPC MAINTENANCE

MAINTENANCE SCHEDULE

Task	Suggested Maintenance Period
Clean the screen	Every week or as needed



Recalibrate the screen	Every month or as needed
Replace the backup battery	Every 6 months or as needed. (Not necessary for the Symbol 8800 series.)
Replace the main battery pack	As needed

CLEAN THE SCREEN

In order to provide the best performance, clean the HPC screen whenever necessary. Pre-moistened anti-static CRT wipes work very well for this purpose. Never use strong solvents on the screen since they can damage the screen's plastic film. Whenever you clean the screen, also clean the Infrared and scanning windows.

FOLLOW YOUR HPC'S SPECIFIC USER GUIDE

The handheld devices in your organization came with documentation on a variety of useful functions, including:

- Setting screen brightness/dimness
- Recalibrating the screen for better accuracy
- Soft resetting the device
- Hard resetting the device (return to factory default)
- Spare batteries available

Consult the specific documentation for your HPC to learn about its unique hardware features.

SAFEGUARD THE DATA IN YOUR HPC

The HPC units should be charged when the power bar is below 30%.

Charge the battery pack in an area where the temperature is between 50° F and 95° F. Charging in areas that are very cold or exposed to direct sunlight can cause deterioration and leaking of the battery pack.

A battery pack that loses power too quickly after it is charged is probably near the end of its service life and should be replaced.

If the HPC does lose all of its battery power, it will be reset to its factory configuration and all data will be lost. If this happens, you will need to perform an application restoration. See below for instructions on how to restore the UPS Trackpad application to the HPC.



Restoring HPC Settings

Follow the steps below to restore the UPS Trackpad application on the HPC:

HARD RESET

FOR THE CASIO IT700

Insert the stylus into the reset hole on the back of the unit, and then hold down the start button on the front for two seconds. The Memory Initialization message will appear on the screen. Press the **Action** button to continue. Press again when prompted. The Memory Initialization message will appear on the screen.

FOR THE SYMBOL 8800 SERIES

For the Symbol 8800 series, open the battery cover and locate the **reset** button. Use the stylus to depress for three seconds while simultaneously holding down the blue **FUNC** key on the front of the Symbol 8800. Replace the battery cover and press the power button to reinitialize the HPC.

For Both

1. The Setup Wizard will begin. Tap the screen to continue.
2. Using the stylus, tap the screen and follow the directions to move through the align screen process as well as the cut and paste setup screens.
3. You will be prompted to choose location and time settings. Instead, tap **Next**.
4. These settings will be configured during UPS Trackpad updates, which run when the desktop is in setup mode during a transfer.

REINSTALL HPC SOFTWARE FOR THE IT700

1. For the IT 700, go to **Start** -> **Programs**. Tap **Utility**. Tap **CardBackup**.
2. Do one of the following:
 - A. If you are restoring from a CF card:

Insert the CF card into the CF card slot on the HPC.

Under location, select **Storage Card**.

Tap **Restore Now**. Do not enter a password. Tap **Yes**.

After a few minutes, you will be prompted to reset. Reset the unit using the stylus. When the unit powers on, UPS Trackpad will load.

Remove the CF card by inserting the stylus into the black square release button located next to the CF card slot. Place the CF card in a safe place.

- B. If you are restoring from the built-in flash disk:



Under location, select the flash disk where the backup file has been saved.

Tap **Restore Now**. Do not enter a password. Tap **Yes**.

Reset the HPC using the stylus.

You must perform a UPS Trackpad Update in Setup mode on the desktop to register the unit, download Custom Fields and list data, and configure date, time, and location. To switch to Setup mode from User mode on the desktop, click the Setup button. Position the HPC in front of the Infrared port, and tap Transfer on the HPC.

REINSTALL SOFTWARE FOR THE SYMBOL 8800 SERIES

1. You'll need to make sure that you have the latest version of Microsoft ActiveSync installed on your desktop. If you do not already have ActiveSync, you can acquire it by going to www.Microsoft.com, searching for ActiveSync, and downloading the latest version. ActiveSync is the communications interface between UPS Trackpad on your HPC and on your desktop (or network). Once you have downloaded the ActiveSync software, launch the MSASync.exe installer by double-clicking on the MSASync.exe icon on your desktop. An ActiveSync installation wizard will launch. When you run the wizard, it will configure your system to talk to your Symbol 8800 Series HPC.
 2. Once your battery is fully charged and your screen is calibrated you will need to make a configuration change on the handheld that will increase the performance of the software installation process. Please follow the steps below:
 3. On your HPC, tap on the **Start Menu**, Tap **ActiveSync**, **Tools**, **Options**. Check the box **When Cradled Enable PC sync using this connection**. Select **115200 Default** from the dropdown list. Tap **OK** to save the setting.
 4. Then, connect the HPC to your desktop. There are two ways to connect it to your desktop. You may choose either of the following two methods:
 - a. Insert the serial charging cable firmly into the bottom of the HPC. Insert the other end of the cable, which is a nine-pin serial connector, into your PC. (Refer to your PC's user documentation if you have trouble locating a nine-pin serial port.) Evenly tighten the two screws to finger-tightness so ensure the best communication between the HPC and your desktop PC.
- OR
- b. Using the cradle that came with your portable computer, firmly connect the adaptor on the cradle to a serial port on your PC. Place the cradle base on a firm, flat surface within easy reach of your keyboard. Rest the HPC in the cradle evenly, making sure it connects securely.
5. Once ActiveSync has located your HPC, find the latest version of UPS Trackpad for HPC software on your system. The default location is C:\Programs\UPS\Trackpad\TCS.



6. Make sure ActiveSync is "connected" and the HPC unit is on. Insert your Trackpad installation CD and navigate to the folder Trackpad HPC (or a similar name). Double-click UPSTrackpad.exe.
7. The installation wizard will guide you through the transfer of UPS Trackpad to your HPC. Follow the installation wizard's prompts.
8. Finally, soft reset the HPC. Hold down the green enter key and the blue function key while pressing either of the two yellow side keys. Hold the three keys simultaneously for five seconds.
9. Run UPS Trackpad on the PC and enter **Setup**. Tap **Transfer** on the HPC so the configuration settings from Trackpad Central System (TCS) migrate to the handheld.



Trackpad Software Implementation Procedure

The UPS Trackpad User Guide is designed to help you install, configure, and use UPS Trackpad in your work environment.

You will want to pursue the following order of operations for best results with your Trackpad system.

1. First, decide if you wish to run Trackpad as a standalone application on a desktop computer, on your network, or on a database server.
2. Second, acquire the hardware you need to run Trackpad and install it. Troubleshoot any hardware issues before you install Trackpad software.
3. Third, install Trackpad software on your primary workstation computer. Create the modifications necessary if you are installing Trackpad on your local area network or database server.
4. Next, install Trackpad onto your handheld personal computers and test your system.
5. Then, have the Trackpad administrator use the Trackpad System Setup menus to customize the installation for your organization.
6. You'll probably want to create company directories and custom fields at this point.
7. If you use UPS Delivery Link, you will also configure Delivery Link to work with Trackpad at this time.
8. Finally, once you have fully customized your workflow, test it before training your staff on how to use their new Trackpad system.

At any point in your implementation of Trackpad, you can access this guide through the **Help** button in the UPS Trackpad software. You may also download topical information from <http://www.UPSTrackpad.com>. You may make copies and distribute portions of this guide to your implementation team.



System Components

UPS Trackpad is a system composed of one or more handheld units, one or more Windows-based computers, and peripheral support equipment such as infrared devices or label printers. The following descriptions of systems components should be a guide for you as you build your Trackpad system.

UPS TRACKPAD HANDHELD COMPUTER (HPC)

Each UPS Trackpad System includes a Handheld Personal Computer (HPC) with a built-in signature pad and bar code reader. A stylus is provided for entering information, obtaining signatures, and writing on the touch-sensitive screen.

Each HPC is fitted with a rechargeable main battery pack and a lithium cell. The main battery pack provides power for both the HPC and the bar code reader. In the event of a main battery failure, the lithium cell functions as a temporary memory backup to prevent loss of information.

An infrared transceiver built into the HPC transfers data between the UPS Trackpad Workstation and the handheld. The serial charging cradle can also transfer data back and forth.

Currently, the handheld personalized computers used with Trackpad have been standardized to the Casio IT700 and the Symbol 8800 series. You may order these through your UPS representative.

UPS TRACKPAD WORKSTATION

The UPS Trackpad workstation is an Intel-based Pentium computer running Microsoft Windows 2000 or XP. Due to the large amounts of data stored, a minimum of 40 MB free disk space, 64 MB RAM and a Pentium II or higher processor are required. The workstation serves as the central component of the system, performing data transfer, storage and access functions. The workstation also configures the entire system. You are responsible for providing a PC on which to run Trackpad.

WIRELESS INTERFACE

The infrared device enables the UPS Trackpad workstation to communicate with the handheld units using infrared light. Transfer occurs at 9600 baud using the IrDA v1.0 protocol. To operate effectively, the handheld unit should be approximately six inches away from and pointed directly at the infrared port. The wireless interface also allows you to download information from your UPS driver's DIAD equipment. Most people prefer to mount the IR device on top of the Trackpad workstation's monitor.

DESKTOP BARCODE WIRED/WIRELESS SCANNER (OPTIONAL)

The desktop barcode scanner is an additional, optional scanner that allows for data capture directly at the workstation where bar code size and scanning distance can present challenges. This means at the Trackpad workstation, you don't have to have a dedicated HPC. You can use the desktop barcode scanner instead.



DESKTOP SIGNATURE PAD (OPTIONAL)

The desktop signature pad makes it possible to capture signatures at the workstation, providing proof of pickup or delivery even without an HPC. It works in conjunction with the desktop barcode scanner.

DESKTOP BAR CODE LABEL PRINTER (OPTIONAL)

The thermal bar code label printer allows you to print barcode labels from the UPS Trackpad workstation. These labels include a tracking number as well as custom delivery information. This can be extremely useful when you need to generate a new package, and wish to have the functionality of barcoding.

NETWORK (OPTIONAL)

Trackpad can run in a networked environment, but this is optional.

INTERNET CONNECTION (OPTIONAL)

Trackpad can use Internet connectivity with Trackpad Online to track packages through-out the lifecycle of a parcel delivery. This is optional, depending on how you configure Trackpad.

DATABASE SERVER (OPTIONAL)

Trackpad can be configured to work with a SQL database to manage large volumes of parcels. This is an optional configuration and requires that you have a database installation and a network already in place.



Hardware Installation

PRE-INSTALLATION CHECKLIST

Prior to beginning the installation, check that the following items are available and meet the minimum requirements. Before you install UPS Trackpad software for your workstation and handheld personal computers, you'll want to install the hardware you will be using, and make sure it's properly configured. Once you are sure it's configured properly, install UPS Trackpad.

Once software is installed, your installation of UPS Trackpad is not over. At a minimum, from Trackpad's setup menu, visit the **Device Setup/Options** menu, the **Custom Options** menu, and the **System Setup** menu to customize your installation. The procedure is:

1. Install all hardware.
2. Install UPS Trackpad software.
3. Manage your hardware installation from the UPS Trackpad set up menu

UPS Trackpad Workstation Computer Specs

- Microsoft Windows 2000 or XP
- Microsoft Internet Explorer 5.0 or greater
- MAPI 1.0 Mail Client (MS Outlook or Outlook Express recommended)
- 120 MHz processor (400 MHz or greater recommended)
- 32 MB of RAM (64MB for Windows 2000/XP recommended)
- 50 MB of available disk space (100 MB recommended)
- Super VGA monitor (minimum resolution 800 x 600, small fonts)
- Mouse and keyboard
- Three available serial ports (optional)
- Two USB ports (optional)
- Two Printer ports (optional)
- Check for the required amount of power outlets and/or outlet strips

UPS Trackpad HPC Specs

- Symbol 8800 Series HPC(s) or Casio IT700 HPC(s)
- Serial charging cradle
- Power supply
- Infrared device (optional)

File Server Specs (Optional)

- Microsoft Windows NT Server 4.0 or later, with SP5
- 166 MHz processor (400 MHz or greater recommended)



- 64MB of RAM (128MB recommended)
- 200MB of available disk space for data storage
- Workstation Access rights (read, write, execute) on shared folder

Database Server Specs (Optional)

- Microsoft Windows NT Server 4.0 or later, with SP5
- Microsoft SQL Server 7.0 (SP1) or SQL Server 2000
- Microsoft Internet Explorer 5.0 or greater
- 166 MHz processor (400 MHz or greater recommended)
- 64MB of RAM (128MB recommended)
- 100MB of available disk space for installation of database files
- 200MB of available disk space for data storage

Note: Install and test all hardware prior to installing UPS Trackpad software.



WIRELESS INTERFACE (IR) – ACTISYS

Please note: do not plug your Actisys device in without first installing its driver from the installation CD.

1. Insert the Actisys CD into your computer's disk drive. It should automatically open.
2. Click **Install Device Software**.
3. Click the model number of the device—typically ACT-IR2000UL.
4. After the installation finishes, plug the device into an unused USB port. Follow the prompts to complete the installation. The LED on top of the device will blink periodically.

TROUBLESHOOTING THE INFRARED DEVICE

To double check settings to make sure the infrared device has been installed correctly, open the Windows Control Panel and double click on the infrared icon.

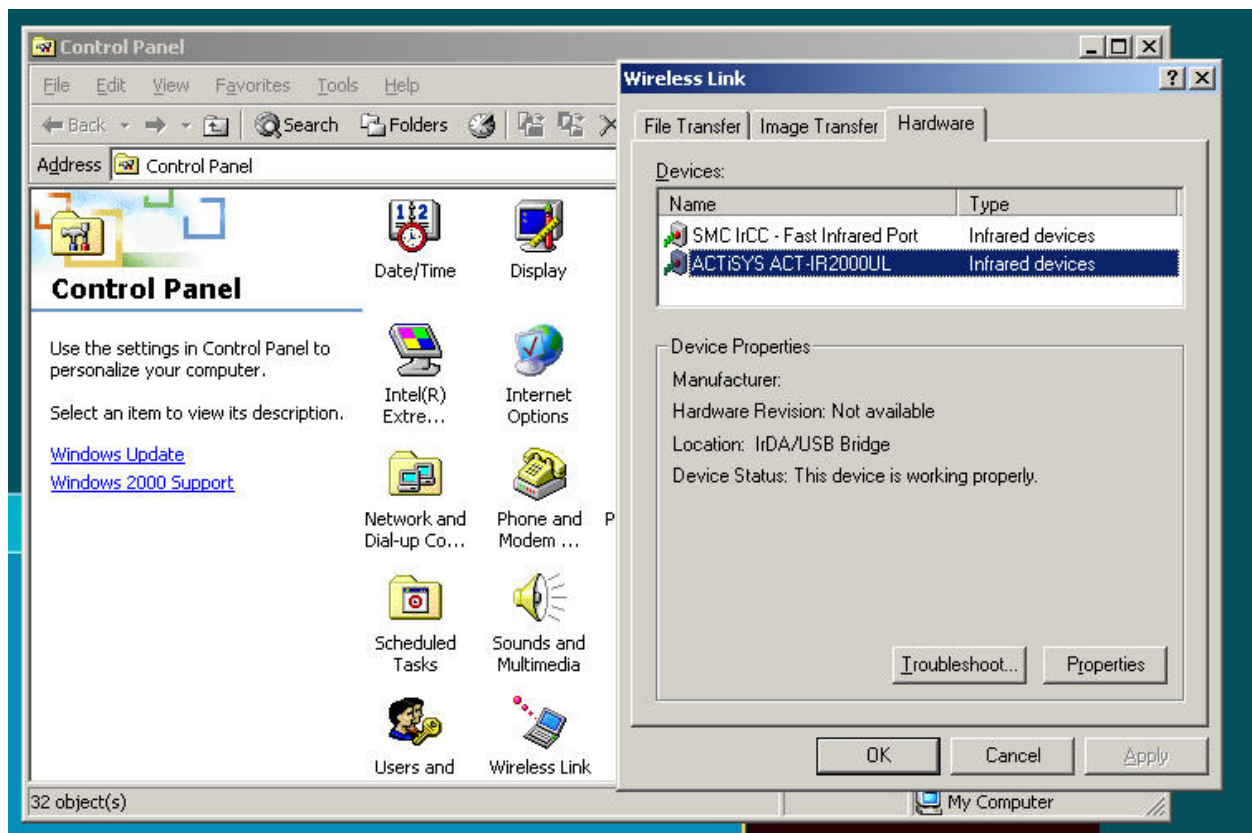


Figure 21 - Control Panel for Infrared Device



DESKTOP BAR CODE LASER SCANNER (CORDED)

To install the desktop bar code laser scanner:

1. Plug the PC keyboard into the keyboard wedge cable provided with the Laser Scanner.
2. Plug the keyboard wedge cable into the PC keyboard port.
3. To test, open a text editor such as Notepad or MS Word and then scan a bar code. The bar code number should appear on the screen.
4. The default programming of the desktop scanner is unsuitable for use with Trackpad. You'll need to program your scanner for use by having it scan some a few simple barcodes. You can download this [programming sheet](#) from www.UPSTrackpad.com or by contacting technical support.



WIRELESS INTERFACE (IR) – SERIAL PORT INSTALLATION

1. Connect the IrDA Wireless Interface to one of the desktop's unused serial ports.
2. Select Start -> Settings -> Control Panel -> Add/Remove Hardware.
3. The Add/Remove Hardware Wizard will begin. Click **Next**.
4. For Choose a Hardware Task, select **Add/Troubleshoot a device**.
5. For Choose a Hardware Device, select **Add a New Device**.
6. For Find New Hardware, choose No, I want to select the hardware from a list.
7. For Hardware Type, select **Infrared devices** from the list, and click **Next**.
8. Select **Infrared Device -> Extended Systems / ESI-9680 JetEye Serial Infrared Device**. If your device is not an XTNDAccess, select the correct manufacturer and model from the list.
9. For Hardware Install, click **Next**.
10. Select the COM Port the device is connected to (such as COM 1 or COM 2).
11. Click **Finish**.

To verify that it is functioning properly, turn on the UPS Trackpad Handheld Personal Computer (HPC) and place it within range of the Infrared Device (approximately six inches). Tap **Transfer** on the HPC. An infrared icon will appear in your system tray when a connection is made.

Access the [knowledge base](#) for the IR device at Extended Systems' technical support site.

WIRELESS INTERFACE (IR) – EXTENDED SYSTEMS USB

1. Browse the UPS Trackpad CD to Drivers\Infrared\USB\Extended Systems.
2. Open the Extended Systems folder. You'll see three folders. Open the one that reflects your operating system-- Windows 98, Windows 2000, or Windows XP.
3. Double-click **Setup.exe**.
4. The Add/Remove Hardware Wizard will begin. Click **Next**.
5. For Choose a Hardware Task, select **Add/Troubleshoot a device**.
6. For Choose a Hardware Device, select **Add a New Device**.
7. For Find New Hardware, select No, I want to select the hardware from a list. Note: Do not select XTNDAccess IrDA USB 9685A from the device list.
8. For Hardware Type, select **infrared devices** from the list and click **Next**.



9. Select Infrared Device -> Extended Systems / XTNDAccess IrDA USB 9685 Adapter.
10. For Hardware Install, click **Next**. **Note:** You may receive a warning that the drivers are not tested for XP. Select to continue the installation in spite of this warning.
11. Click **Finish**.

Once the drivers are installed, insert the USB connector of the adapter into the USB port on the desktop computer. The adapter will automatically plug and play.

Access the [knowledge base](#) for the IR device at Extended Systems' technical support site.



DESKTOP SIGNATURE PAD – SERIAL PORT

Make sure all of the necessary pieces of hardware have been included:

- The PS2 Y Power Cable. This is a y-serial cable; it doesn't look like a traditional power cable and it does not plug into the wall. It is a split cable that can be plugged into a mouse or keyboard serial connection, and power two devices.
- The data/serial cable
- The serial LCD Signature Pad

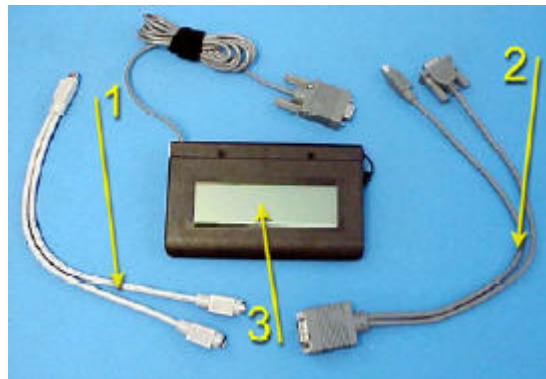


Figure 22 - Components of Signature Pad

Follow this installation procedure.

1. Plug in the PS2 Y Power Cable:
2. Plug the single end of the cable into the keyboard jack at the back of the PC by unplugging the keyboard or mouse
3. Plug the keyboard or mouse back in, using one of the free ends of the y-cable.
4. One plug on the y cable (it does not matter which) should be left free, to be used later.
5. Plug in the serial LCD Signature Pad:
6. Plug the free end of the y-cable from the back of the computer to the matched end of the data/serial cable.
7. Connect the signature pad to the single plug end of the data/serial cable
8. Plug the serial end on the double-plug end of the data/serial cable into the serial port.
9. Plug the serial connection into the back of your computer at a free serial port. Now all free cable ends should be connected. Give the computer a few moments to detect its new settings.



Try writing on your signature pad. You should see a signature develop. The screen will clear in a few seconds for a new signature.

DESKTOP SIGNATURE PAD – USB

Note: The current model distributed with the system is a T-L462-HSB. It is a USB device, but the current USB driver available for distribution is not for this device. **Do not plug in the USB Sigpad cable prior to performing step 12.**

To install the Desktop Signature Pad for USB:

1. Browse the UPS Trackpad CD to the Drivers\Signature Pad\USB folder.
2. Double click **topazusb.exe**.
3. Follow the prompts.
4. Plug the USB adapter for the Signature Pad into a PC USB port. The adapter will automatically plug and play.

TROUBLESHOOTING SIGNATURE PADS

Keep in mind the signature pad pen uses two small batteries; if the signature pad is older the batteries may have worn out. Replace them by unscrewing the cap of the pen.

Visit the SigGem [knowledge base](#) from Topaz Systems if you have further issues with your signature pad. If you continue to have issues, don't hesitate to contact your UPS representative or technical support.



BAR CODE LABEL PRINTER (ELTRON LP 2844) - PARALLEL PORT

Here are instructions for installing the Eltron barcode label printer. If you have difficulties, contact technical support here or visit the Eltron [knowledge base](#).

PRINTER HARDWARE INSTALLATION

1. Connect the printer cable to the computer's parallel port.
2. Connect the AC adapter to the label printer and plug the adapter into an outlet. Turn on the power for the thermal label printer using the toggle switch located on the back of the printer. The power light will glow red, indicating the printer is out of labels.
3. Load the labels provided into the printer, referring to the instructions located inside the printer cover. Close the cover until it locks, and then press the feed switch. The power light should turn green.
4. Install the printer driver .

PRINTER SOFTWARE INSTALLATION

1. Select **Start -> Settings -> Printers**.
2. Double click on **Add printer** in Windows 2000. In Windows XP, click **Add a printer**.
3. When prompted, select **Local Printer**, and make sure "Automatically detect and install my Plug and Play printer" is not selected. Click **Next**.
4. Select the Printer Port, usually LPT1, and click **Next**.
5. Click **Have Disk**. From UPS Trackpad installation CD, select OEMSETUP.INF, located in the \Drivers\Label Printer\LP2844 folder.
6. Highlight the Eltron printer model (LP2844). Click **Next**. Do not change the printer name, do not use the printer as the default, and click **Next**.
7. Do not share the printer. The Eltron cannot be used as a network printer. Click **Next**.
8. Choose **No** (do not print a test page). Click Next.
9. Click **Finish**. If the "Digital Signature Not Found" warning appears, click **Yes**. (This driver was written for WINNT4.0 and can be used with WIN 2000 and Windows XP OS.)
10. Right click on the Eltron printer icon and select Printing Preferences. Click **Advanced**. Change the Paper Size to the correct label size for your operation. Click **OK** to apply the change.



BAR CODE LABEL PRINTER (ELTRON LP 2844) – USB

WINDOWS 2000

1. Connect the power and data cables to the printer. Plug in the AC adaptor. Plug the data cable into an available USB port on the PC.
2. Turn on the printer. When the Add Hardware Wizard appears, click **Next**.
3. Select Search for a suitable driver for my device. Click **Next**.
4. De-select all Optional Search Locations, and click **Next**.
5. Windows will find the driver it needs. Click **Next**. If the "**Digital Signature Not Found**" warning appears, click **Yes**. Click **Finish**.
6. If another Add Hardware Wizard starts, click **Cancel**.
7. Select Start -> Settings -> Printers: Double click Add Printer. Click Next.
8. When prompted, select Local Printer, and make sure "Automatically detect and install my Plug and Play printer" is not selected. Click **Next**.
9. Select the **Printer Port**, usually USB001, and click **Next**.
10. Click the **Have Disk** button, and from the Trackpad installation CD, select the **OEMSETUP.INF** file located in the **\Drivers\Label Printer\LP2844** folder.
11. Highlight the Eltron printer model (LP2844). Click **Next**. Do not change the printer name, and do not set as the default printer. Click **Next**.
12. Do not share the printer. The Eltron cannot be used as a network printer. Click **Next**.
13. Choose **No**, do not print a test page. Click **Next**.
14. Click the **Finish** button. If the "**Digital Signature Not Found**" warning appears, click **Yes**. (This driver was written for Windows NT4.0, but can be used with Windows 2000 and XP).
15. Right click on the Eltron printer icon and go to **Printing Preferences**. Click **Advanced**. Change the **Paper Size** to the correct label size (4.00 X 2.00). Click **OK** to apply the change.

WINDOWS XP

Connect the power and data cables to the printer. Plug in the AC adaptor. Plug the data cable into an available USB port on the PC.

1. Turn on the printer. USB support will automatically install.
2. If an Add Hardware Wizard starts, click **Cancel**.
3. Select Start -> Settings -> Printers. Click Add a printer. Click Next.



4. When prompted, select Local Printer, and make sure "Automatically detect and install my Plug and Play printer" is not selected. Click **Next**.
5. Select the **Printer Port**, usually USB001, and click **Next**.
6. Click the **Have Disk** button and from the Trackpad installation CD, select the **OEMSETUP.INF** file, located in the **\Drivers\Label Printer\LP2844** folder.
7. Highlight the Eltron printer model (LP2844). Click **Next**. Do not change the printer name, and do not set as the default printer. Click **Next**.
8. Do not share the printer. The Eltron cannot be used as a network printer. Click **Next**.
9. Choose **No**, do not print a test page. Click **Next**.
10. Click **Finish**. If the "**Digital Signature Not Found**" warning appears, click **Continue Anyway**. (This driver was written for Windows NT4.0, but can be used with Windows 2000 and XP.)
11. Right click on the Eltron printer icon and go to **Printing Preferences**. Click **Advanced**. Change the **Paper Size** to the correct label size for your operation. Click **OK** to apply the change.

REPORT PRINTER

Any laser printer will work with UPS Trackpad to print the various reports. To install, please refer to the documentation that came with your specific printer. Any printer your desktop normally prints to will work for report printing.



UPS TRACKPAD SOFTWARE INSTALLATION

UPS Trackpad software should only be installed after your hardware is installed and configured.

CUSTOMIZING UPS TRACKPAD

UPS Trackpad is a highly versatile and customizable solution for your organization. By considering how it can function best in your environment before you begin installation, you can reap the benefits and cost savings of Trackpad sooner.

UPS Trackpad is a system—it is not one piece of software. Rather, it is a suite of hardware and software systems that work together to create a customized parcel tracking system for your entire organization. (You can review the components in the [Systems Components](#) section of this guide.) At a minimum, you will install software for your desktop computer (or network) and also you will install separate software for your Trackpad HPC(s).

As you prepare for the installation of Trackpad software on your system components, consider which type of installation is best for your organization. UPSTrackpad® can be configured to accommodate three styles of operation and data storage: **Standalone**, **Networked**, and **Database Server**. **No matter how you choose to configure Trackpad, this main installation will be referred to as Trackpad Central System (TCS).**

STANDALONE – UPS Trackpad is installed on a single workstation and the configuration and data is not shared by any other workstations. The data is stored locally in .mdb files. For a standalone system, complete Step 1 as described below. Then move to [Setup](#) to configure the remainder of your system and your Trackpad HPC(s).

NETWORKED – UPS Trackpad is installed on one or more workstations and the configuration and data are stored on a common file share server. The data is stored both locally and on the file share server in .mdb files. For a Networked implementation, complete Steps 1 and 2 before moving on to [Setup](#) to configure the remainder of your system.

DATABASE SERVER – UPS Trackpad is installed on one or more workstations and the configuration and data are stored on a common file share server and the database server. The data is stored both locally and on the file share server in .mdb files and on the database server in an SQL table. If you have purchased UPS Trackpad SQL, complete Steps 1, 2, and 3 before moving on to [Setup](#) to configure the remainder of your system.

Depending on your needs, all three installation types may also use the following components to extend functionality.

UPS TRACKPAD ONLINE – All three of the installation styles mentioned above can be enhanced by UPS Trackpad Online, a software option installed on a Web server that allows you to track packages outside of your organization, using the UPS global network of package information. UPS Trackpad Online is especially valuable when people within your organization but outside your mailroom function need access to package receipt and



delivery. They can be provided a Web site address where they can log into to access Trackpad records.

UPS Trackpad Online empowers recipients in your organization to be in charge of some of their own package detail, and assists the mailroom function by lessening customer service demands. Instead of asking mailroom personnel to track a package, UPS Trackpad Online makes it easy for anyone with access to the Internet to track their package, even internally on the Trackpad Central System.

UPS Trackpad Online is a separate software installation for a Web Server running IIS and Windows Server 2000, and requires an Internet connection. Once you've completed your basic installation of UPS Trackpad, ask your UPS Professional Services representative for information on UPS Trackpad Online.

UPS TRACKPAD HPC – Trackpad supports several HPCs, including the Symbol 8800 series and the Casio IT 700. All installations require you to install Trackpad software on your handheld personal computers (HPCs). (This module of the Trackpad system is often referred to as "Trackpad for HPC.")

Installation of your HPC will vary depending on the model you have chosen, so be sure to refer to the specific documentation for your HPC for those details. Once you have Trackpad installed on your computer, network, or server, refer to the proper section on HPC hardware installation to set up your HPC. Then, once it is set up as a device on your system, proceed with the HPC software installation.

Once you've set up your hardware, no matter which type of installation you've chosen for your organization—standalone, networked, or database server—you start with the same initial procedure. Using your Trackpad CD-ROM, insert it into your primary workstation.



WORKSTATION SOFTWARE INSTALLATION.

Step 1.

1. Close all programs.
2. Insert the UPS Trackpad Installation CD into the computer's CD drive **or** download the latest Trackpad software from www.UPSTrackpad.com. (You will need a client login from your UPS representative to download the software.)
3. Browse the UPS Trackpad CD to Setup\Desktop.
4. Double-click **Setup.exe**.
5. To run UPS Trackpad, either double click on the UPS Trackpad desktop icon or go to **Start -> Programs -> UPS -> Trackpad**.
6. Enter the product registration code when prompted. The product code you enter varies by the type of installation (desktop, network, or database server) and is critical to installing the proper components. Your UPS representative will give you the registration code you need.

Your **STANDALONE** installation of Trackpad is now complete! You'll want to refer to the **System Setup** section now to customize Trackpad further for your needs, and to the **Trackpad Handheld Device** section to install Trackpad on your handheld personal computers.

If you need to use Trackpad on a network or a database server, refer to the following sections for further installation instructions.



NETWORK INSTALLATION FOR SHARED DATABASE (.MDB)

Step 2.

By placing the Trackpad database files on your network, you can have any Trackpad user with network access using the same files. To use this configuration, install Trackpad locally on one or more networked computers. Then follow the instructions below to configure each computer to access the common database files stored on a network shared directory.

The common network path is specified in each workstation's **TCS_NODE.INI** file. This file contains a parameter datapath that indicates where UPS Trackpad should Look for the database files.

SETTING UP THE FILE SHARING DIRECTORY

1. Set up a file share directory on a network file share server accessible by each workstation. Jot down the path of this shared location and give it an obvious name like "Trackpad_Files."

UPS Trackpad users will need to have "modify" rights to the directory. (You may need your network administrator or IT administrator assist you with this step.)

2. From the UPS Trackpad Install directory on your Trackpad workstation (the default setting is C:\Program Files\UPS\TCS), copy the following files to the file share directory (such as J:\Trackpad_Files)
 - tcs_sys4.ini
 - tcs_stor.mdb
 - tcs_list.mdb

Use **CTRL+SHIFT** and your mouse to select all three files at once, then right click to **MOVE** them to their new location. (If you are using UPS Trackpad version 4.0 or higher, your initialization settings file, or .ini, will be named tcs_sys4.ini. If you are using previous versions, your .ini file will be named tcs_sys.ini.)

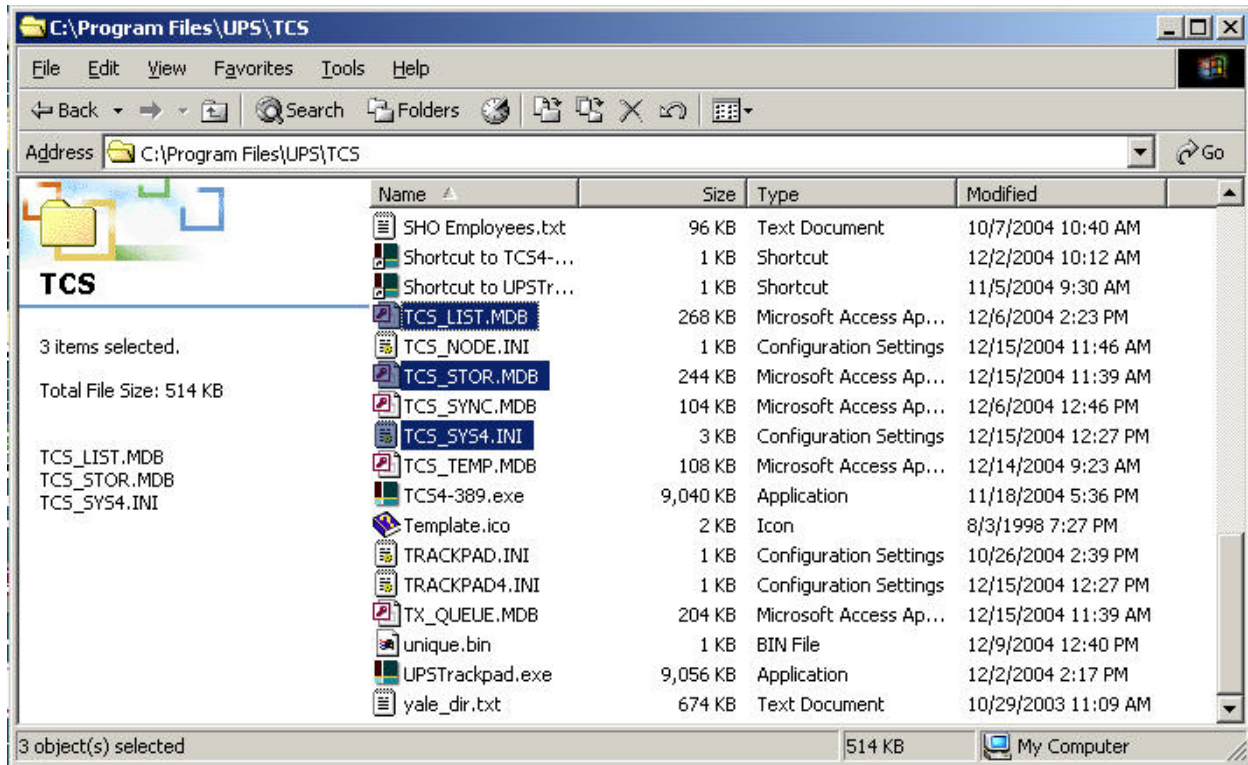


Figure 23 - Copying files to a new location

3. Either double click on the UPS Trackpad desktop icon or go to **Start -> Programs -> UPS -> Trackpad** to launch UPS Trackpad.
4. Click the blue **SETUP** button at the bottom left of the screen.

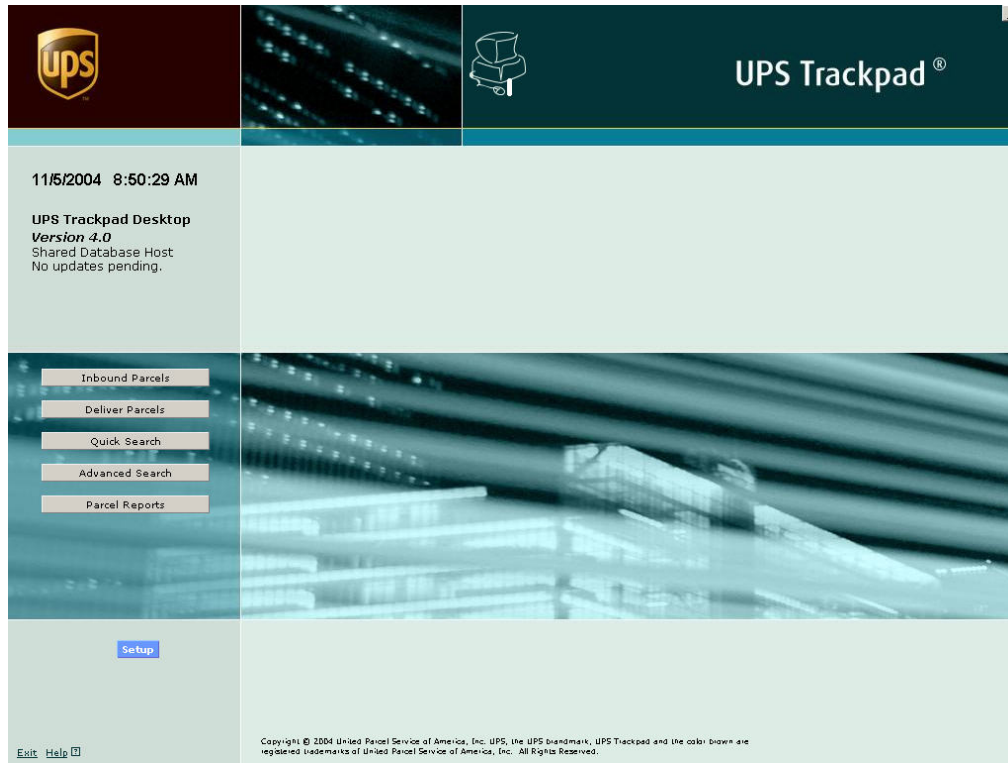


Figure 24 - Main User Screen

5. Enter the password. The default password is "supe." (You can change this later in **Custom Options**.)

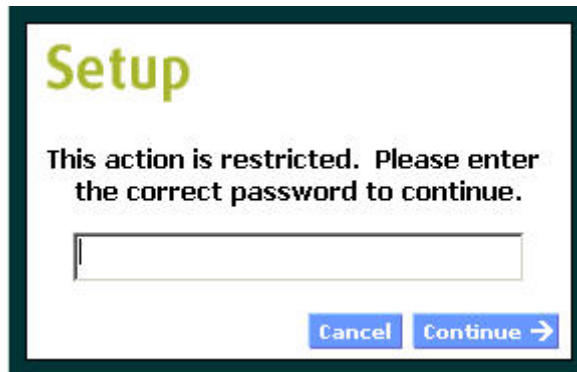


Figure 25 - Login Screen

6. Click on **System Setup -> Desktop Setup**. (Desktop Setup is the third file tab in the menu.)

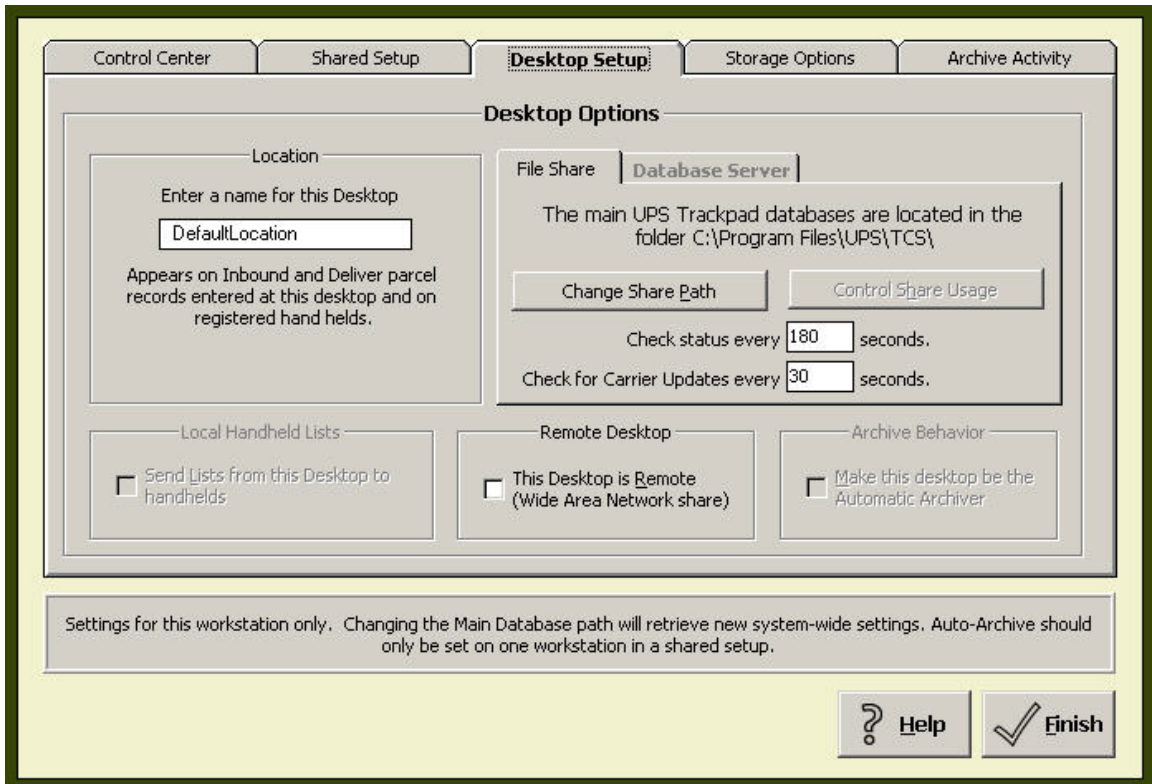
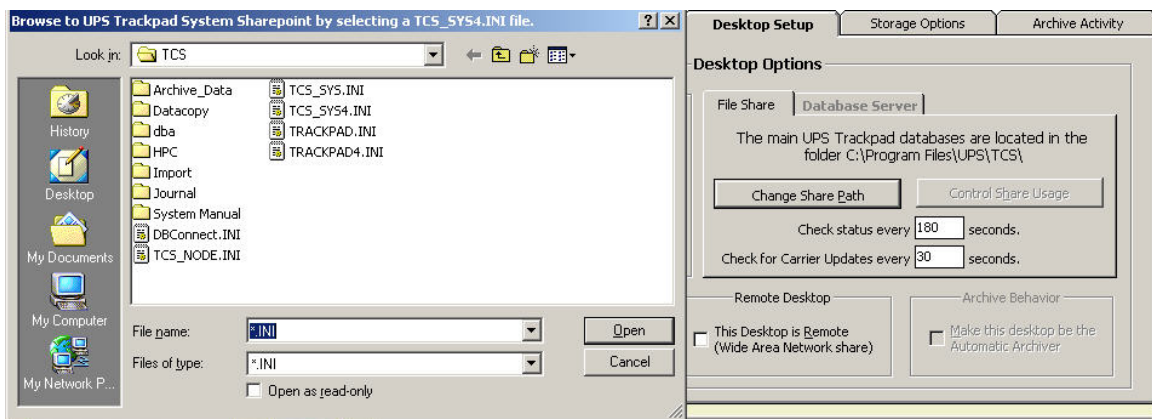


Figure 26 - The Desktop Setup Menu Allows You to Specify File Locations.

7. Click on **Change Share Path**. Locate your common network share folder (such as J:\Trackpad)—this is the file share you set up in Step 2. Select **TCS_SYS4.ini**, and click **Open**.



NOTE: Repeat **Steps 3 - 7** for each UPS Trackpad Workstation accessing the common file share directory. You will have to install Trackpad on each workstation individually.



DATABASE SERVER INSTALLATION (UPS TRACKPAD SQL SERVER ONLY)

Step 3.

You may decide you prefer Trackpad to run on your database server. If so, follow these steps for database server installation. The procedure to install the first Trackpad database server client is different from subsequent installations.

INSTALLING THE FIRST DATABASE SERVER CLIENT

1. Close all open applications.
2. Either double click on the UPS Trackpad desktop icon or go to **Start -> Programs -> UPS -> Trackpad.**
3. Select **Setup**, the blue button to the bottom left of your screen
4. Enter the password when prompted. The default is "supe."

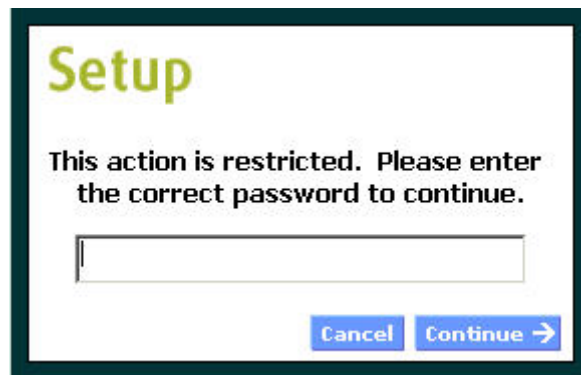


Figure 27 - Enter a password to access administrative setup.

5. Click on the top button in the menu, **System Setup**, and then choose the third file tab, **Desktop Setup**.

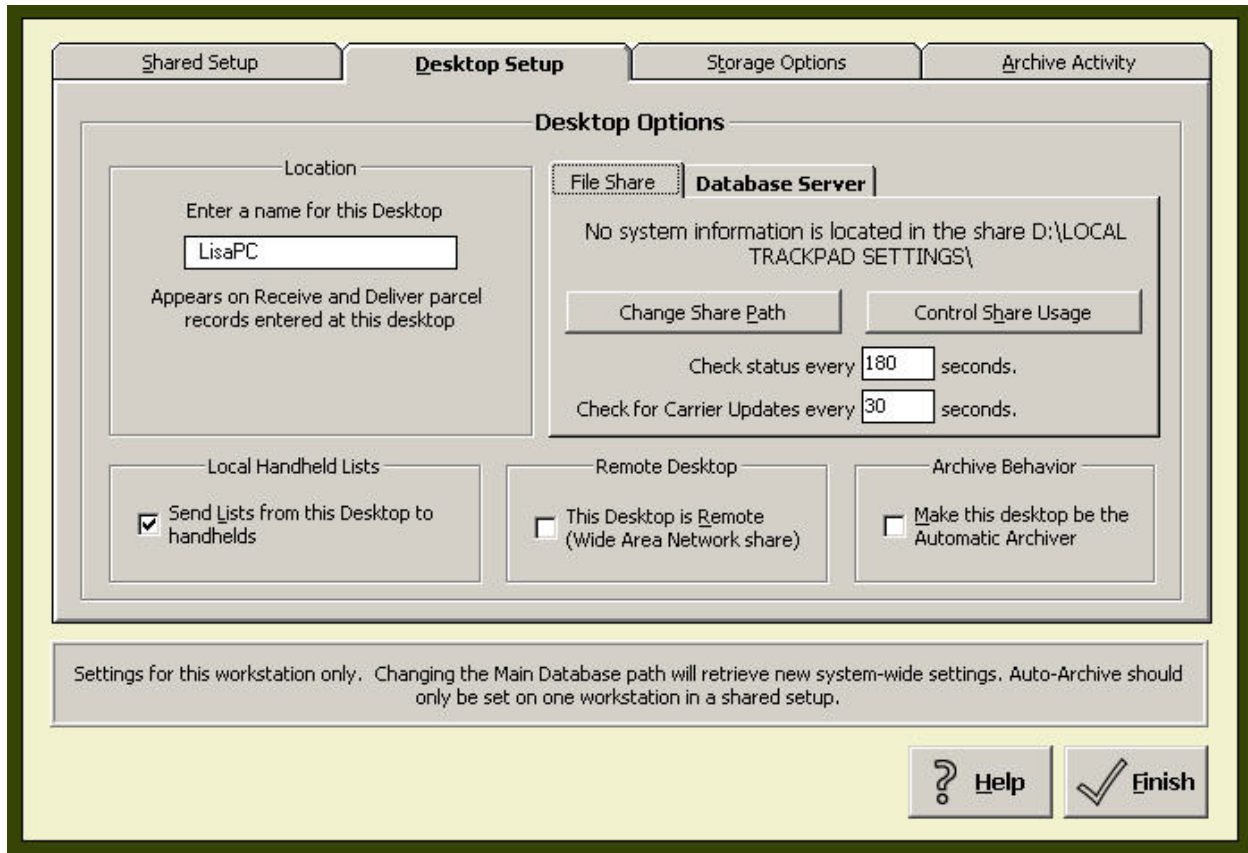


Figure 28 - Set up your database server from the Desktop Setup Menu.

6. Select **Database Server -> Configure Server**. The Database Server tab is located underneath the File share tab.
7. An information message box will appear describing the database server setup. Click **Take Action** to continue or **Cancel** to end the operation

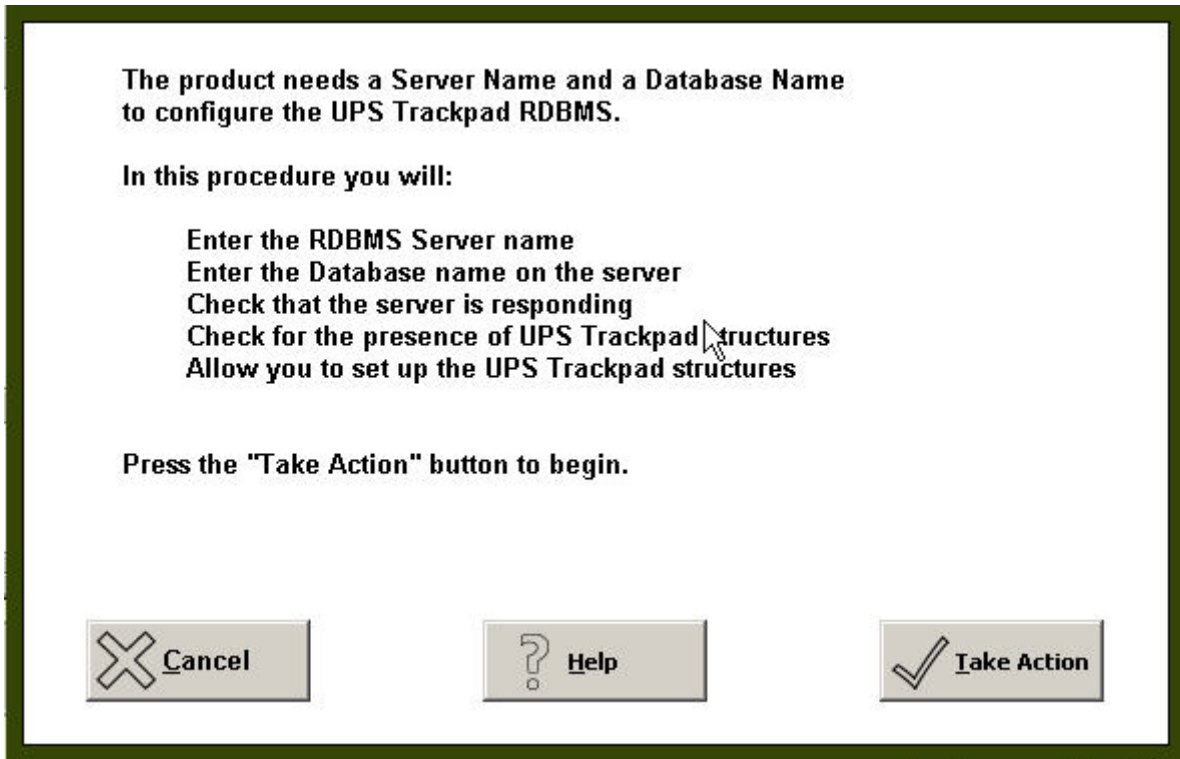


Figure 29 - Sample information message from UPS Trackpad.

8. Enter the name of the **Database Server** and **Database Name** (the default database name is OnTrackCompat but you may change this to reflect the name of a database you have already created on the system). Click **Take Action** to continue.
9. Enter the username and password with rights to the database. **Note:** You will need system administration rights to login to the SQL server. Also choose how you wish these passwords to be stored in the future. The easiest option for future users is "**remember both (don't prompt again, ever).**" Click **Proceed** to continue.



Please enter a username and password with privileges to perform this action.

Username: TP_Admin

Password: *****

Authentication Recall Option

Forget both after completing this operation
 Keep in memory until application shutdown
 Remember the Username for future recall
 Remember both (don't prompt again, ever)

Figure 30 - Database Login Screen

- The database server setup is almost complete. In the following screen, the server is named **GARSEWKS1497b** and the Trackpad database is named **Trackpad**. The names you use will likely vary. Click on **Take Action** to continue.

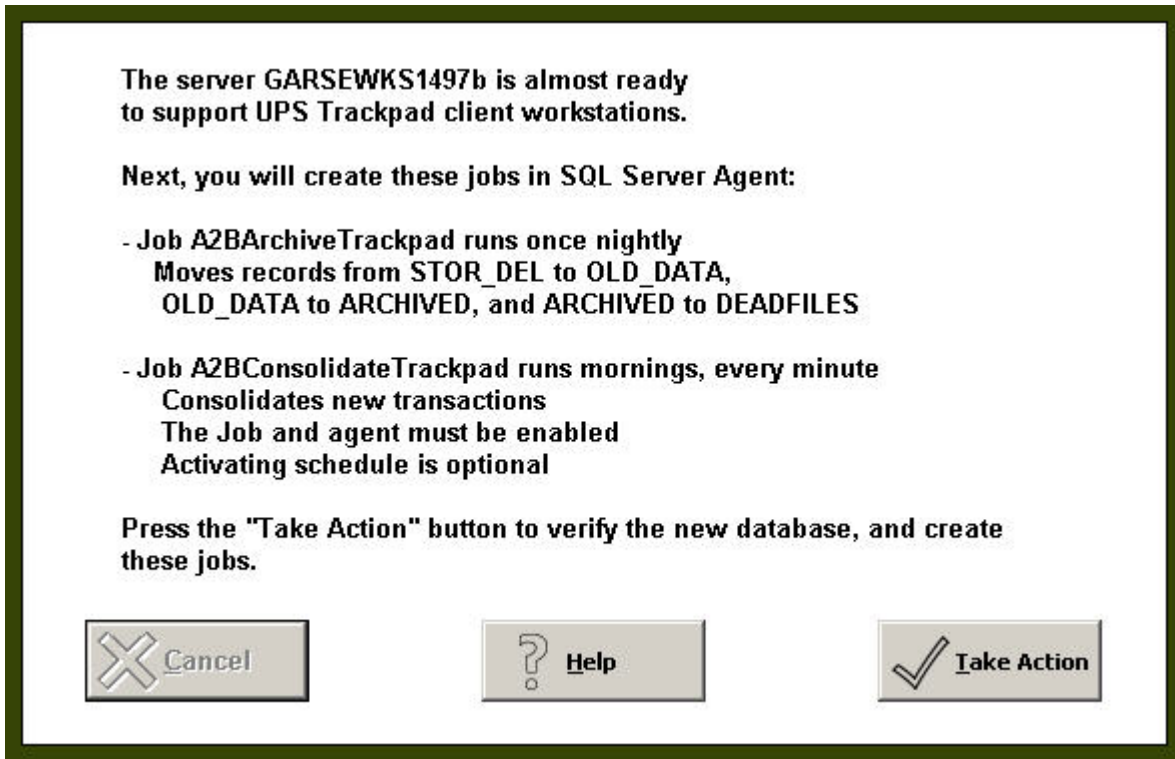


Figure 31 –UPS Trackpad confirms new server settings.

9. Success! The Database Server is ready for use. Click **OK** to complete the installation.

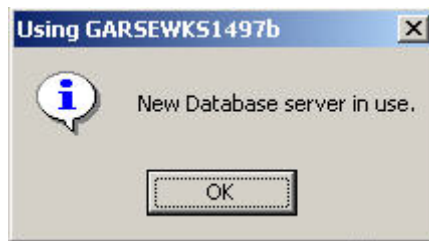


Figure 32 – UPS Trackpad confirms server use.

10. Next, you'll see options for archiving and consolidation. You may wish to discuss these settings with your IT administrator. The consolidation setting asks you if you wish to keep a full history audit trail or just update the current entry. You may also enable Log_Debug. The archive behavior options allow you to specify how many days' records are kept in the three progressive archive files. They are:

- Stor_Del
- Old_Data
- Archived

You may choose to delete old data when it reaches the end of its specified lifecycle in the Archive Type Option field.

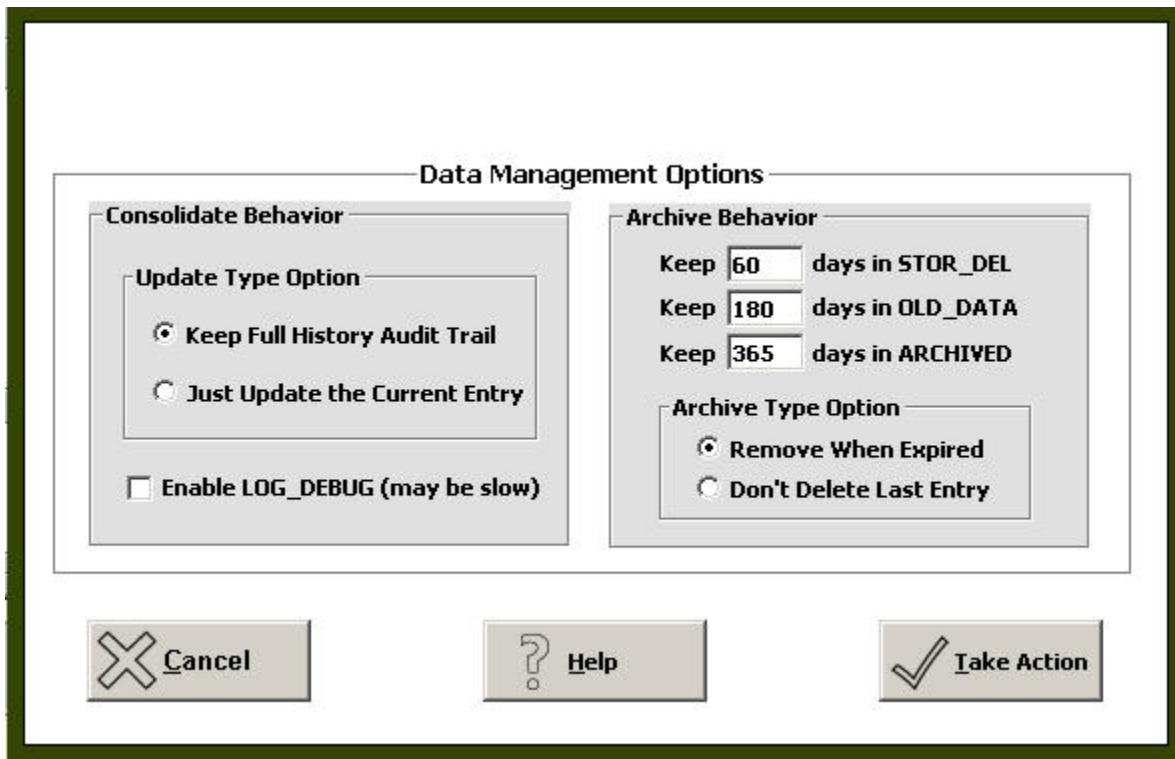


Figure 33 - Database Management Options Menu

INSTALLING ADDITIONAL CLIENTS ON DATABASE SERVER

1. Insert the Installation CD into the next client computer's CD drive.
2. Launch installation of UPS Trackpad.
3. Follow the on-screen instructions for installation.
4. Either double click on the UPS Trackpad desktop icon or go to **Start -> Programs -> UPS -> Trackpad**.
5. Enter the Product Registration code when prompted. Make sure your UPS Professional Services representative knew you were going to do a database installation—the product registration code tells Trackpad to install server-appropriate information.
6. Enter **Setup** by clicking the blue Setup button at the bottom left. Login to the administrator section. The default password is **Supe**.
7. Click **System Setup -> Desktop Setup**.

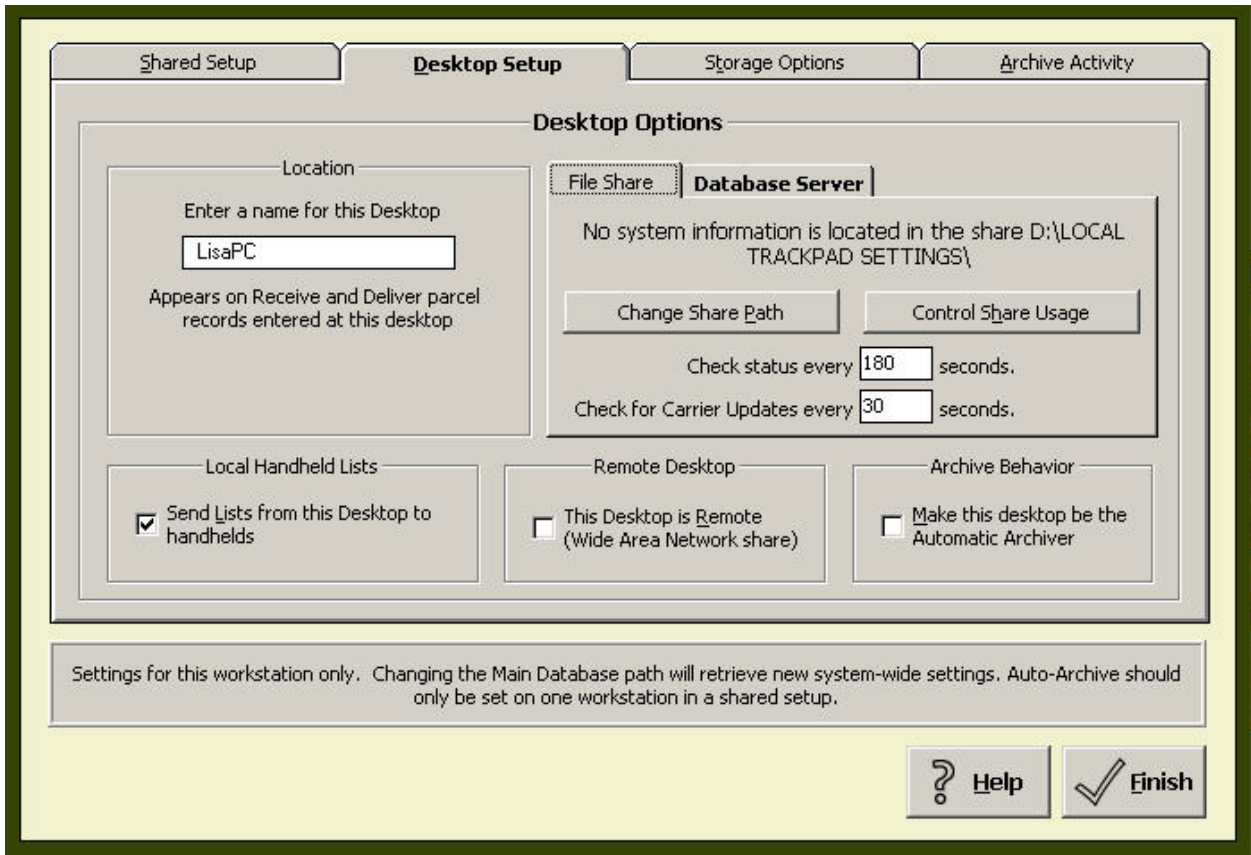


Figure 34 - Desktop Setup Menu

- Click on **Change Share Path**. Locate your common network share folder, such as J:\Trackpad. Select **tcs_sys4.ini**, and click **OPEN**.

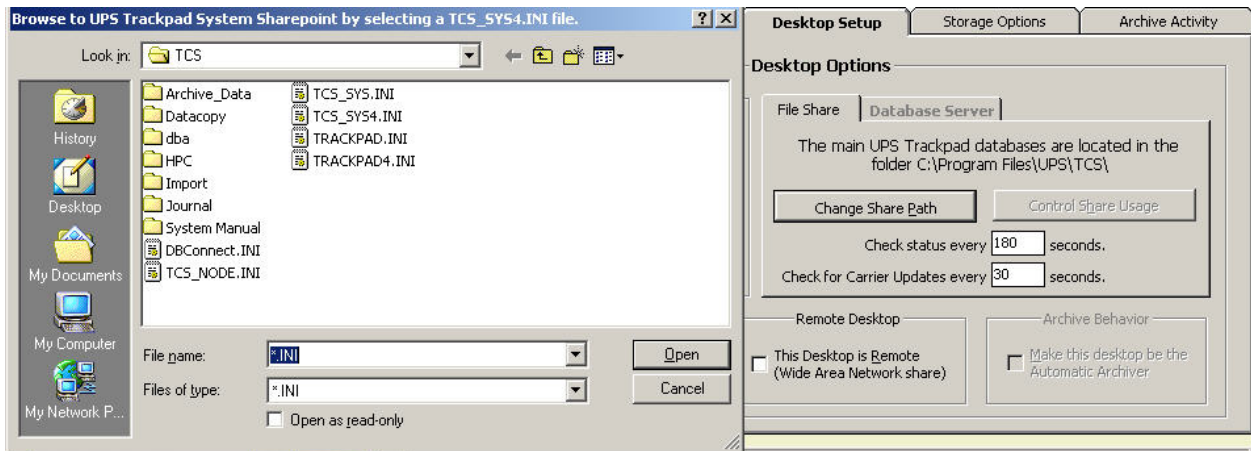


Figure 35 - Changing the Share Path

- Repeat these steps for each licensed UPS Trackpad workstation.



UPS TRACKPAD® ADMINISTRATIVE SETUP

The information in this section is for the UPS Trackpad system administrator.

UPS Trackpad includes several options to configure the entire Trackpad system—both the centralized installation and the handhelds. Setup changes made to the system become current in handheld devices the next time those units are synchronized.

All of the configuration information is maintained within the UPS Trackpad application by entering Setup mode.

To enter Setup, first start the UPS Trackpad program. To do this, select **Start > Programs > UPS > UPS Trackpad** or click the Trackpad shortcut icon on your desktop.

On the Trackpad **Main Menu**, click the blue **Setup** Button located near the bottom left corner of the screen.

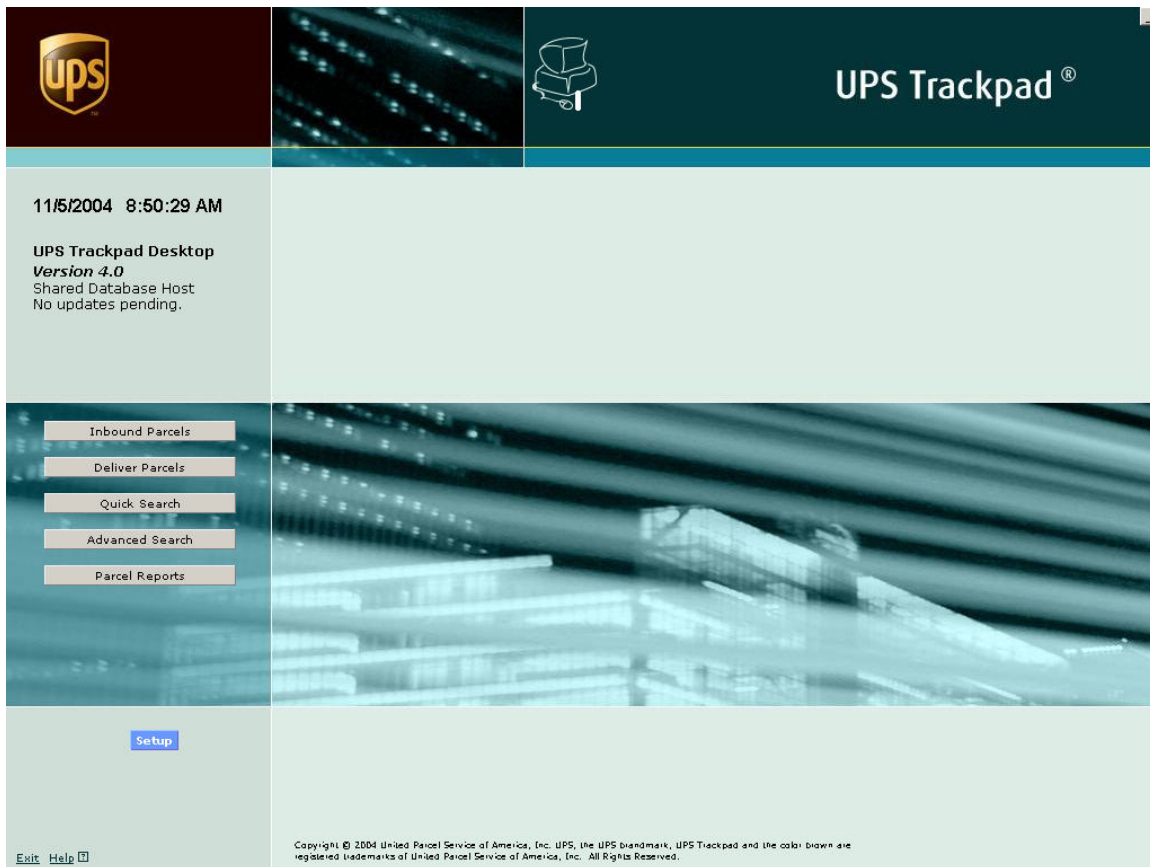


Figure 36 – UPS Trackpad Main User Menu

The default password is “SUPE” (without the quotes).



Once you have entered the password, the **Setup Menu** appears. The **Setup Menu** is easily identified by its yellow background color. The buttons on the screen will also change to correspond with the options within **Setup**. These options are described below.

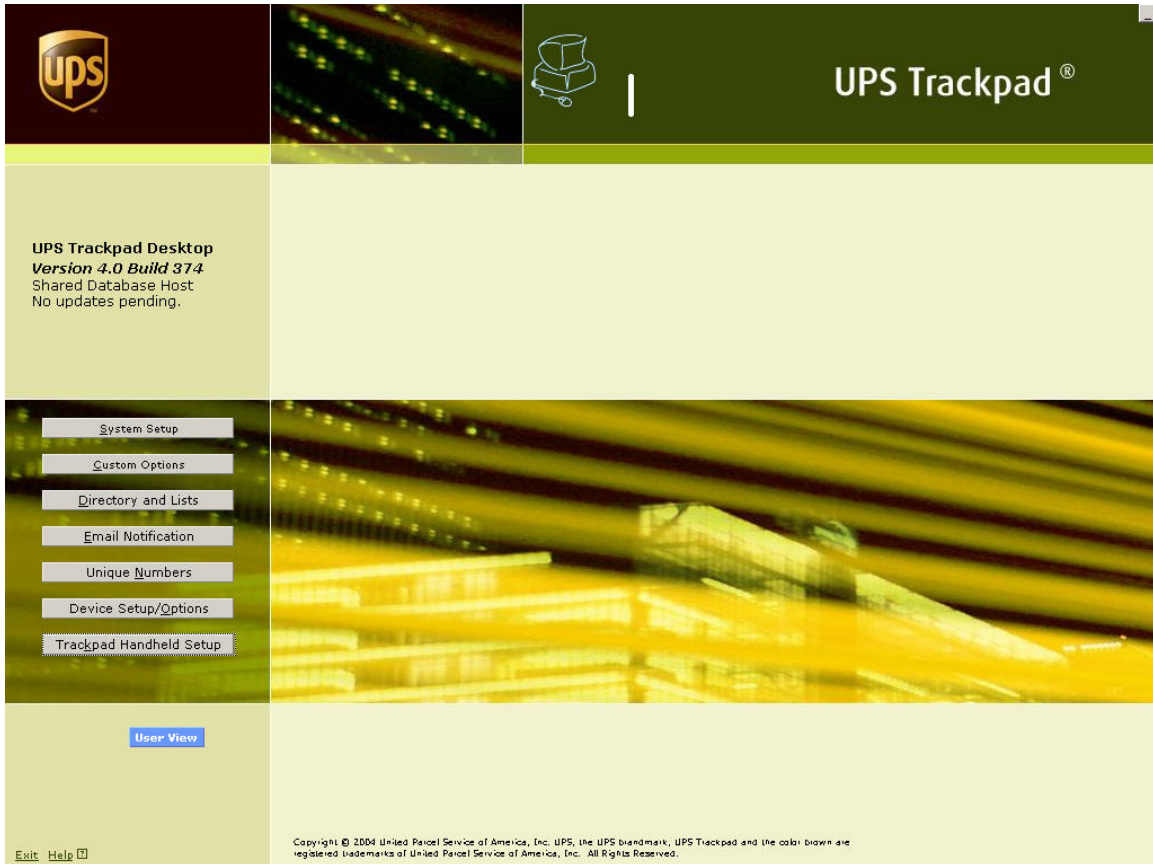


Figure 37 – UPS Trackpad Setup Menu

To return to the Main Menu, click the **User View** button.

SYSTEM SETUP

From the **Setup Menu**, click the **System Setup** Button to view the different areas of system configuration. You will see four tabs.

- Shared Setup.
- Desktop Setup.
- Storage Options.
- Archive Activity.

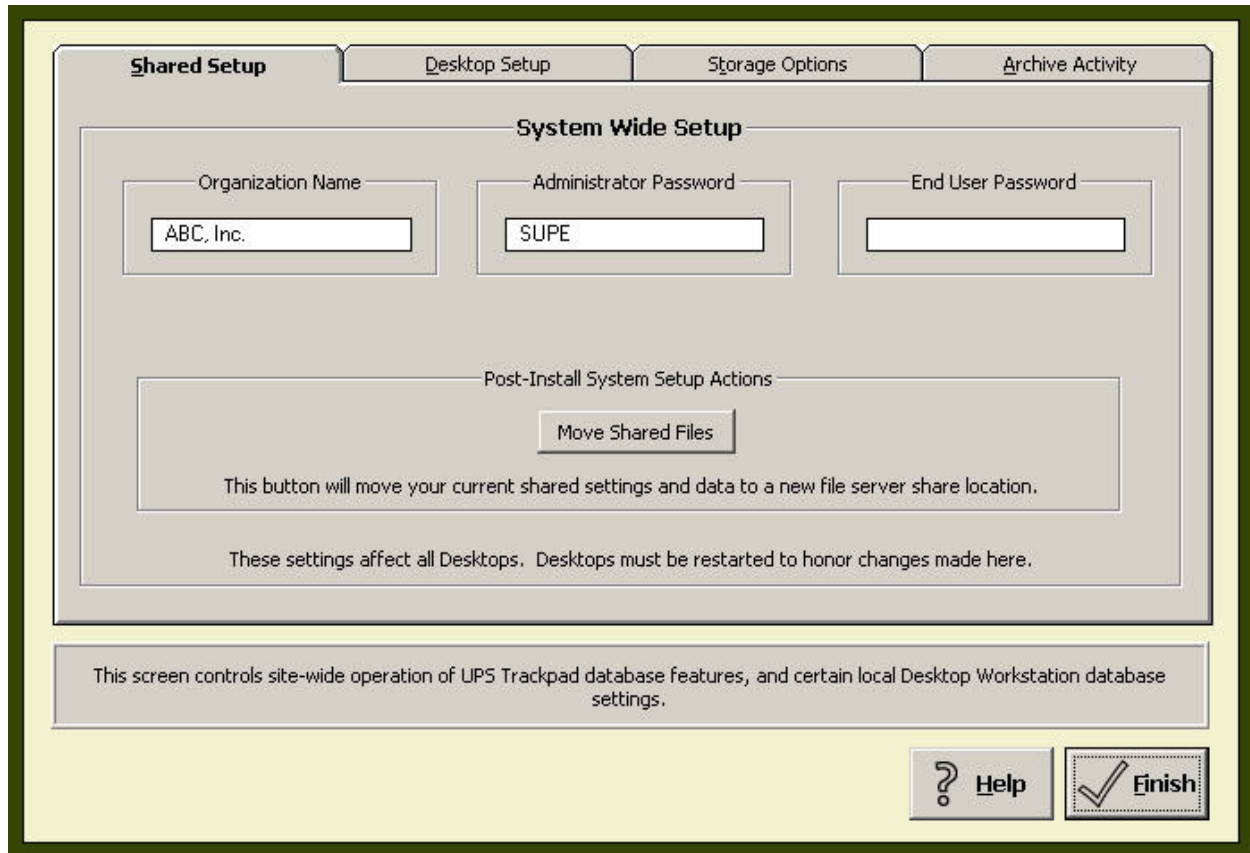


Figure 38 - Main System Setup Menu

SHARED SETUP

This section controls the basic shared information. The following settings are stored system wide, and if networked, all the desktop systems will share these settings.

Organization Name

Be sure to type your company's name under **Organization Name**.

Administrative Password

This is where you may change the password to get into the administrative area of Trackpad. The first time, you used SUPE, which is the default password. If you change this password, you must keep careful records of your new password. For lost password issues, call technical support.

End User Password

This password is for users to gain access to system features. Implementing a password at this level means you password protect even the user menus of Trackpad.

MOVE SHARED FILES

This feature sets up a new shared location for the databases and system configuration settings. The share must already exist and the users must have appropriate permissions



before you reset Trackpad's location. (Typical permissions required are setting SHARE to FULL and NTFS to MODIFY.)

Enter the path of the shared directory you want to use. The system will copy the current database and configuration files to the new location and change the database path of the current desktop. (This feature is only available in network versions of UPS Trackpad.) The default path is the installation path. C:\Program Files\UPS\UPSTrackpad. You can enter a new path in the form of x:\folderY\folderz, where x, y, and z are the names specific to your system.

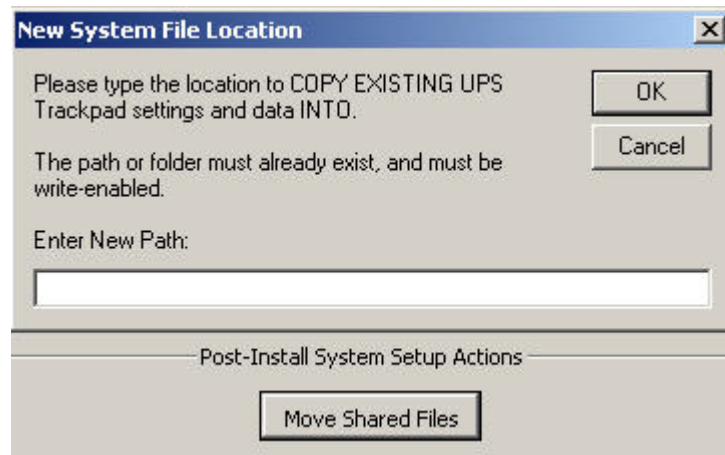


Figure 39 - Move Shared Files

Note: You will have to manually change the database path of any other UPS Trackpad desktops that will use this shared location by entering the new pathname **on each machine** from the **Desktop Setup** menu. Desktop setup is the second tab within the System Setup menu.

DESKTOP SETUP

This section sets the local configuration information. If your system is networked, these settings are not shared among all the UPS Trackpad desktops.

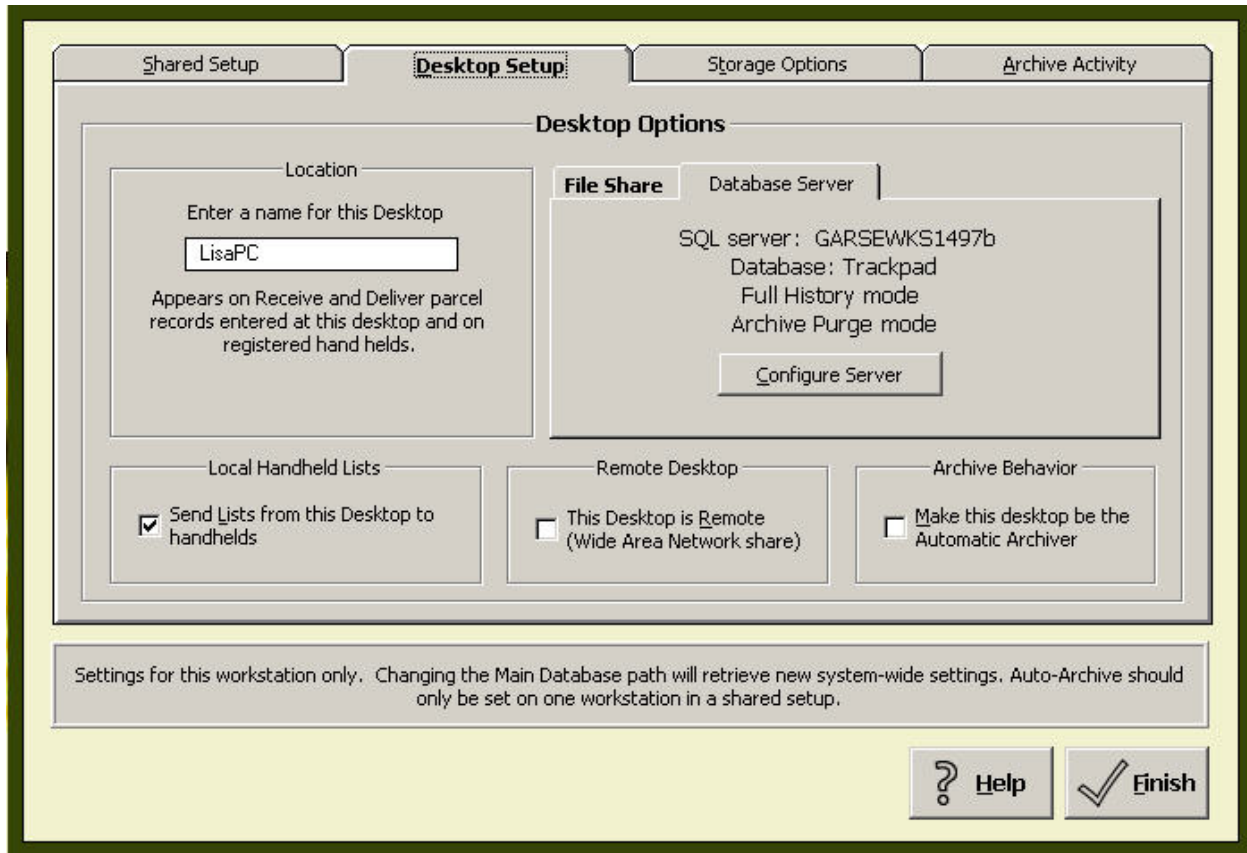


Figure 40 - Desktop Setup Menu

Local Handheld Lists

This option allows each desktop system in a networked environment to keep individual lists for its HPC units. This feature can significantly speed up a handheld's performance if each location only uses certain items of the system or master list. For more information on how to manipulate the drop-down lists and how to take advantage of the local list feature, see [Using Local Drop-Down Lists](#).

Remote Desktop

This feature makes small changes to the internal settings that will result in better system performance if the current desktop system is located at a remote site or if the network connection is slow or inconsistent. Remote systems might be networked via a dial-up connection, with a connection speed that is significantly slower, or at a location that is a great distance from the main database. This setting is only available in network versions of UPS Trackpad.

Archive Behavior

Check this box if automatic archiving will be done from this desktop. It is recommended that only one desktop perform automatic archiving in order to avoid potential conflicts that could occur with two desktops working on the database at the same time. The machine that performs archiving should be in close proximity to the shared file to improve performance. This setting is only available in network versions of UPS Trackpad.



THE FILE SHARE TAB

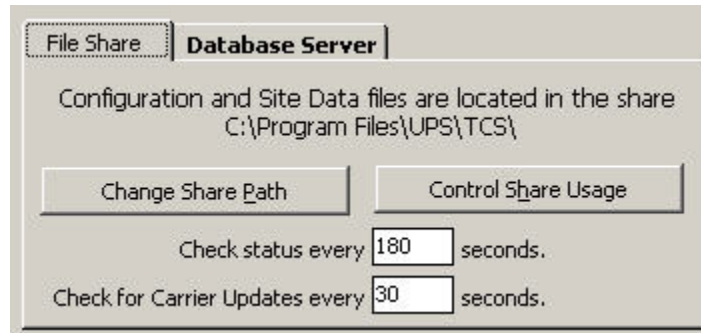


Figure 41 - File Share Tab Within Desktop Setup

Change Share Path

The share path is the location of the database and configuration files necessary to operate UPS Trackpad in a networked installation. To change the database path, click on **Change Share Path** and select the **tcs_sys4.ini** file in the shared network file directory. The database path must be individually set on each desktop. Move the file before you attempt to change this setting.

Check Status

This is the interval at which each UPS Trackpad desktop checks the availability of the database path. The default setting is 180 seconds. If the specific desktop is a fast computer and the company network is running smoothly, reducing this interval may increase the system's performance.

Check for Carrier Updates

This is the interval at which each UPS Trackpad desktop checks for updates to your list of carriers (shipping vendors). The default setting is 30 seconds. If the specific desktop is a fast computer and the company network is running smoothly, reducing this interval may increase the system's performance. Otherwise, this setting may be increased.

CONTROL SHARE USAGE

This robust menu of options only works with database server installations. It allows you to control workstation access to a shared database file. You usually have two options. One is to store the file in question with your **relational database management system** (RDBMS). The other is to store that file or setting in a location that is shared on the network with other users.

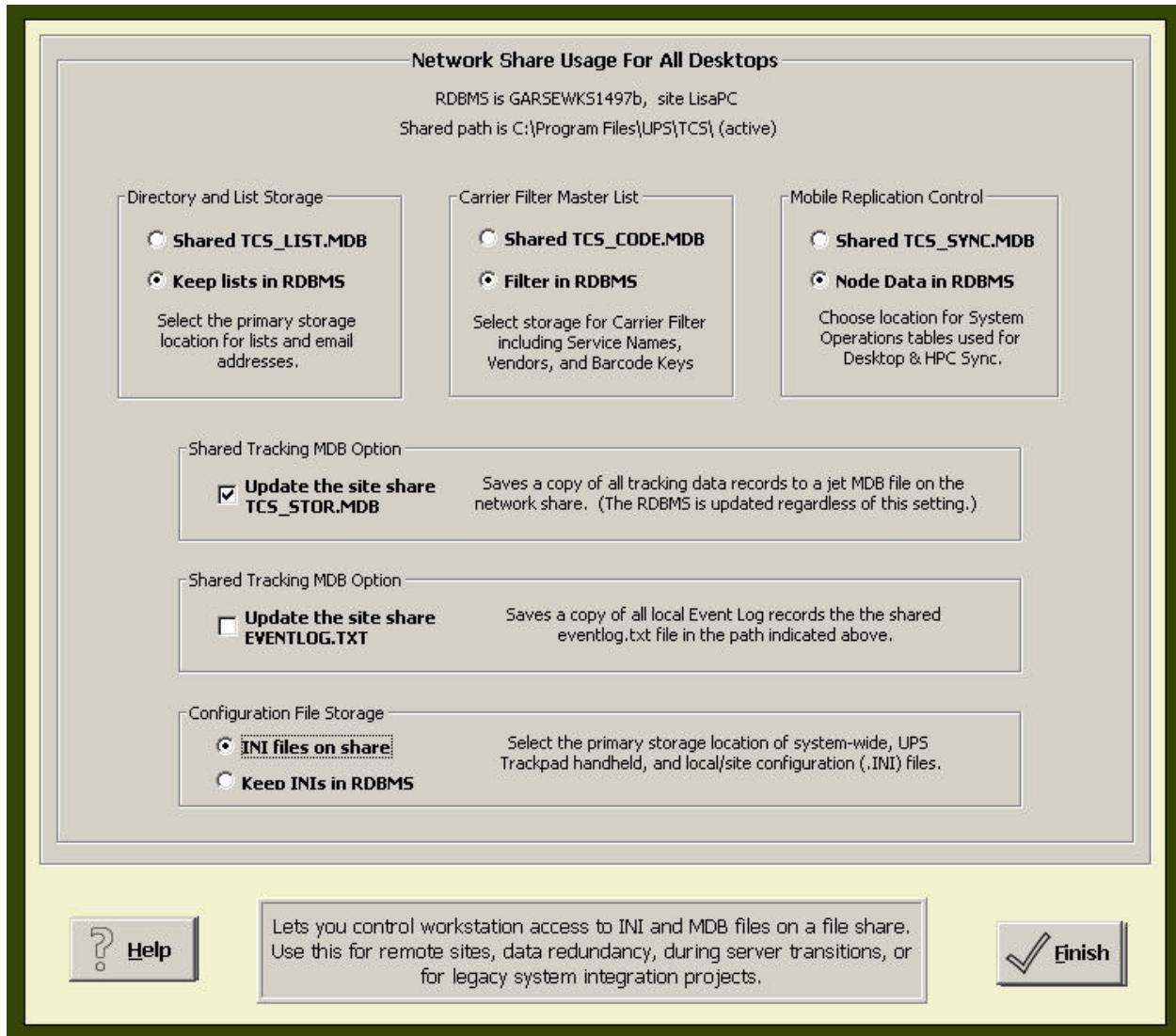


Figure 42 - Control Share Usage Menu

Directory and List Storage

Select the primary storage area for lists, either a shared TCS database or RDBMS. (Lists are custom data that you create separately from Trackpad, import through the **Directory & Lists** menu, configure through the **Custom Fields** menu, and use to **populate** custom fields.)

Carrier Filter Master List

The carrier filter master list specifies your package delivery services such as UPS and others, the types of service (such as UPS 2nd Day Air or UPS Worldwide Express), and information associated with these vendors. This file can be stored either with your RDBMS or in a shared network location. Trackpad comes with several popular services already populated, and allows you to add services to that list. This information is used when receiving packages.



Reference

ZQXY204 Auto

Shipping Carrier Service Name Vendor

Airborne
DHL
Fedex
UPS
USMail

Custom Field 6

Options
 Send e-mail

Custom Field 2

Custom Field 7

Custom Field 3

+ Add Package

Enter Receive package information.

? Help

✓ Finish

Figure 43 - Inbound Menu Showing Carrier

The Carrier Master List also populates a report popular with users—the Carrier Volume report.

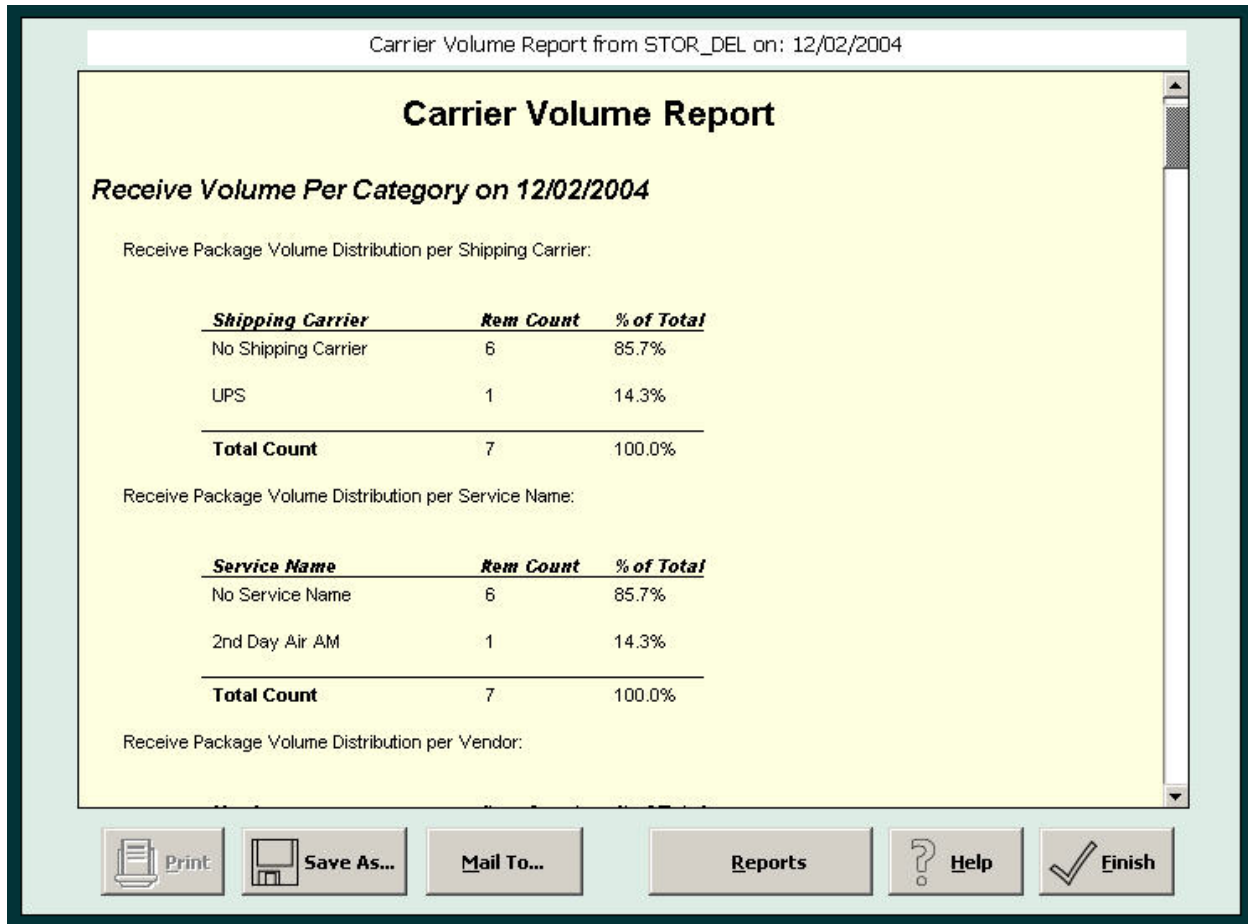


Figure 44 - Carrier Volume Report

Configuration File Storage

The files that store your unique Trackpad settings are .ini files. This menu option specifies where you store these files—on the network or on the RDBMS.

Mobile Replication Control

This setting allows you to choose one of two locations for the files that control the synchronization of the Trackpad Central System with the handheld units. The two choices are "shared tcs_synch.mdb" to store the file as a shared database file, or "node data in RDBMS."

Shared Tracking MDB "Update the site" Options

These two check boxes allow you to create redundant copies on your network of two important files—the data storage file (tcs_stor.mdb) and the record of transactions on your system (eventlog.txt).

Configuration File Storage

This setting allows you to specify whether you want to store all your configuration files (.ini's) at your share path, or with your RDBMS.



DATABASE SERVER TAB

The Database Server Tab displays database configuration options and allows you to configure the server. You will only see this tab when you have selected a server-type installation.

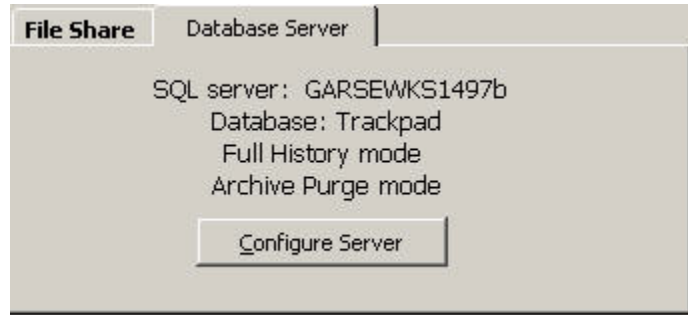


Figure 45 - Database Server Tab on Desktop Setup

Configure Server

This allows the administrator to make changes to the Data Management Options once the database server has been set up. See the [Software Installation](#) section for more information on creating a SQL installation of UPS Trackpad.



Data Management Options

Consolidate Behavior

Update Type Option

Keep Full History Audit Trail

Just Update the Current Entry

Enable LOG_DEBUG (may be slow)

Archive Behavior

Keep days in STOR_DEL

Keep days in OLD_DATA

Keep days in ARCHIVED

Archive Type Option

Remove When Expired

Don't Delete Last Entry

✕ **Cancel**

? **Help**

✓ **Take Action**

Figure 46 - Data Options Management Menu

STORAGE OPTIONS TAB (FOR .MDB DATA STORAGE ONLY)

In the System Setup menu of the administrator area, the fourth tab is called **Storage Options**. You use this tab to specify your main archiving settings and also to set the parameter of how you treat the availability of delivery information.

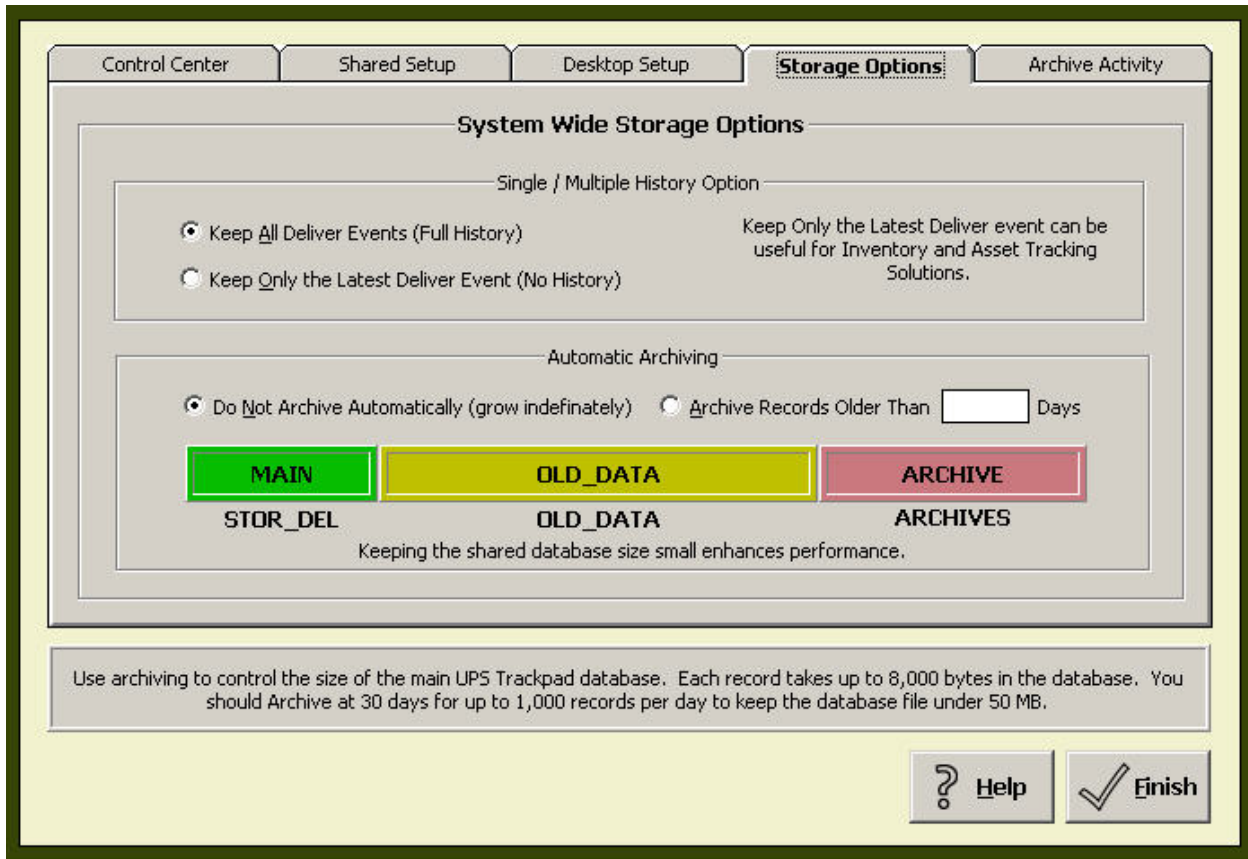


Figure 47 - Storage Options Menu

Single/Multiple History Option

To keep a record of All Delivery Events, select **Keep All Deliver Events**. To retain only the most recent event select **Keep Only the Latest Deliver Event**.

AUTOMATIC ARCHIVING

This setting controls the size of the main database (tcs_stor.mdb). Each record takes up to 8,000 bytes—which means you should archive at 30 days for up to 1,000 daily records to keep the file size under 50 MB. Considering the number of records your organization generates on a daily basis, you can choose an archive setting that makes sense for you.

(If you do not want the automatic archiving to occur, select **Do Not Archive** in a network or a database server installation of Trackpad.)

To enable automatic archiving, click **Archive Records older than ___ Days** option, and enter the number of days you want data stored in the main database (tcs_stor.mdb).

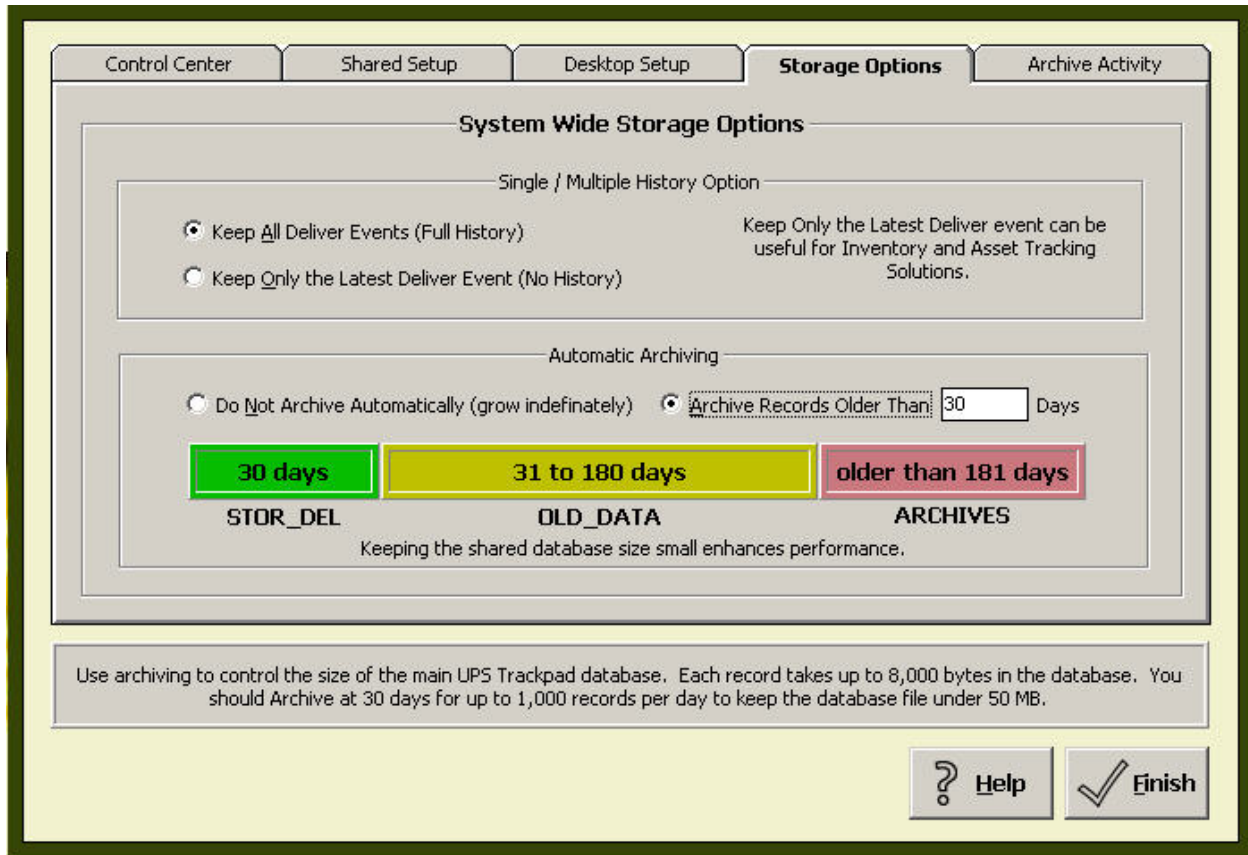


Figure 48 - Archiving Enabled

Automatic archiving means Trackpad automatically removes the data from the main database table (stor_del in the tcs_stor.mdb file) and archives it. First, the data is renamed “old_data.mdb” and saved. Records remain in the “old database” until they are *five times older* than the number of days you specified. Then they are archived to a file stored in the “Archive_Data” folder. The file name will be the **date range** of the data in the format DDD MMM DD - DDD MMM DD, YYYY.mdb, such as “Fri Jul 09 - Tue Jul 13, 2004.mdb”.

A synopsis of the archive process is displayed within the menu when you choose to archive. For example, when you specify archiving records older than 30 days, UPS Trackpad shows you graphically that the active Trackpad storage file (STOR_DEL) has 30 days, the “Old_Data” stores records from 31-180 days old, and the ARCHIVES will warehouse data older than 180 days.

ARCHIVE ACTIVITY

The settings on this tab affect the database maintenance process that UPS Trackpad uses to keep your data safe and manageable. Trackpad runs database repair and maintenance processes that keep your data in good working order. Maintenance is an automatic function that runs in the background—these settings allow you to control the timing. Archiving is an optional process that you can also choose to run during maintenance.

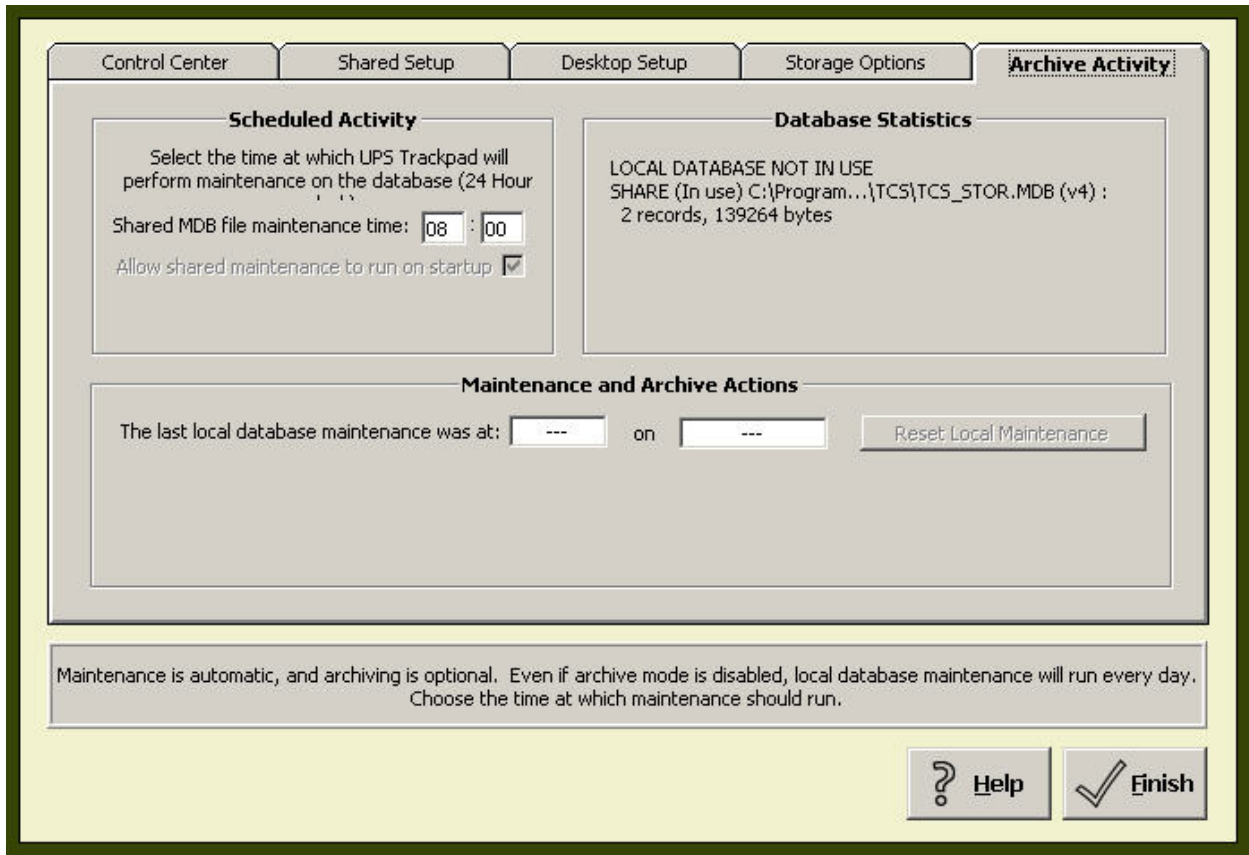


Figure 49 - Archive Activity for a Standalone System

SCHEDULED ACTIVITY

This setting determines when database maintenance should occur. To avoid interfering with response times, pick a time when the system is not in use, such as before everyone arrives at work, during the lunch break, or at the end of the day.

The desktop that performs database maintenance must be on for archiving to take place. If archiving is missed, it will occur the next time Trackpad is launched on the PC designated as the automatic archiver.

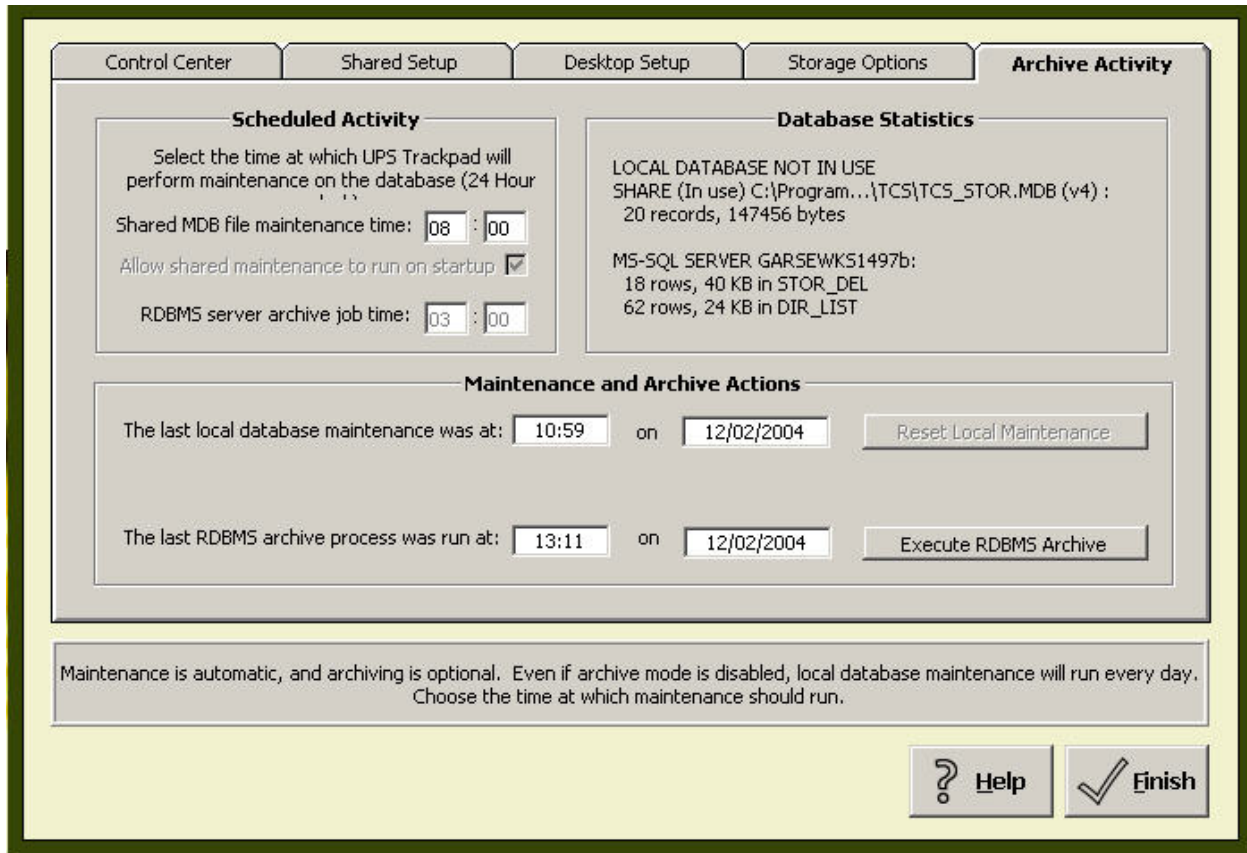


Figure 50 - Archive Activity Tab for a SQL Installation

MAINTENANCE AND ARCHIVE ACTIONS

The manual overrides force the database maintenance **Archive Actions** activity to occur the next time the system is started up regardless of the scheduled maintenance time. This is particularly useful when a change has been made to the archive settings.

Archiving is performed during database maintenance. If you have just turned on archiving for the first time and want it to run immediately, you must force maintenance and restart the system by clicking the button marked **Reset Local Maintenance**.

DATABASE STATISTICS

This informs you of the last successful completion of the database maintenance activity. If maintenance hasn't occurred in the past few days, then there might be a problem with the system. You should correct this problem to ensure the safety of your data.

After you have finished the Setup process, save your changes and return to the **Setup Menu** by clicking the **Finish** Button.



Custom Options

From the **Setup Menu**, click on the **Custom Options** Button. These options give you control over how the system Looks and feels to the users. Features can be enabled or disabled and terms can be changed to reflect your company's terminology. The Tabs for Custom Options are **Tracking Terms**, **Custom Fields**, **Bar Code Filter**, **Desktop Security**, and **Report Control**.

The screenshot shows the 'Tracking Terms' settings window. It features a tabbed interface with the following sections and fields:

- What are you Tracking?:**
 - Singular:** Input field containing 'parcel', default: "parcel"
 - Plural:** Input field containing 'parcels', default: "parcels"
- What is your tracking term?:**
 - Reference:** Input field containing 'Tracking Number', default: "Tracking Number"
- "New parcel" action:**
 - Business Event Name:** Input field containing 'Receive', default: "Inbound"
 - Desktop Button Text:** Input field containing 'Receive parcels', default: "Inbound Parcels"
- "Move parcel" action:**
 - Business Event Name:** Input field containing 'Deliver', default: "Deliver"
 - Desktop Button Text:** Input field containing 'Deliver parcels', default: "Deliver Parcels"
- "Move parcel" to:**
 - Recipient:** Input field containing 'Recipient', default: "Recipient"

At the bottom of the window, there is a **Help** button (with a question mark icon), a summary message: "This is a summary of your UPS Trackpad settings. Click on a named tab to change settings in a given area.", and an **Finish** button (with a checkmark icon).

Figure 51 - Tracking Terms Settings

TRACKING TERMS

Different companies track different things. Some companies track parcels, some track packages, and some track documents. By changing the tracking terms, you can make UPS Trackpad reflect your organization's preferences.

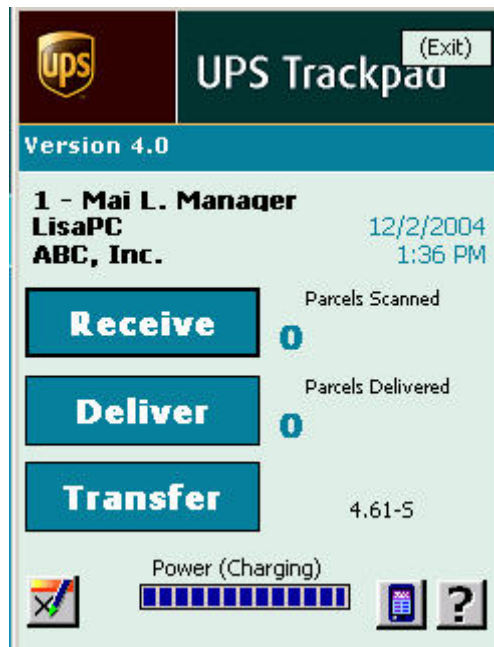


Figure 52 - Custom Tracking Terms Viewed On HPC

Default Terms in Trackpad
(Modify in Tracking Terms Menu.)

Definition

Parcel	The name by which you refer to the item tracked
Inbound	The name of the receiving process
Deliver	The name of the delivery process
Tracking Number	The reference you use for the tracking identifier

When you make changes, the next type handheld devices synchronize with the central system, those changes will be reflected.

CUSTOM FIELDS

Configuring Custom Fields has a large impact on the system’s Look, feel, and usefulness. Custom Field settings are stored system wide, and, if networked, each desktop will use these same settings.

Custom fields allow you to use your own organization’s data within the Trackpad system. Types of data you might find useful include the names and locations of the personnel who receive parcels at your organization, or the names of companies that regularly send you critical deliveries. You have ten fields that you can fill with your own data and associate with



the inbound (or receiving) process. Depending on what your organization likes to track, you might consider capturing inbound information like:

- From where
- Metro, state, national, or international
- Type of media:
 - ordered goods, mass mail, personal mail, business mail, or indeterminate

Figure 53 - Custom Field Menu



CREATING COMPANY DIRECTORIES

Creating directories greatly simplifies and expands the functionality of Trackpad in your organization. You can create two directories—one for inbound data, and one for delivery data. Trackpad refers to them as the inbound directory and the delivery directory. Together, they are often referred to as “the company directory.”

Inbound Directory	Inbound Key Field	Delivery Directory	Delivery Key Field
Custom Fields 1-10	Custom Field 1	Custom Fields 11-20	Custom Field 11

Both directories are spreadsheet files. They can be thousands of records long, but each must contain only ten custom fields. The fields are organized by columns in your spreadsheet file.

The first column of data is referred to as a key field, because it can be linked to the other fields in its row of data. The first column is the record that allows inbound information to be autopopulated, should you choose to turn the **autopopulation** feature on (please see the section on autopopulation for more information).

You save the spreadsheet(s) in .csv or tab-delimited .txt format, and import them through the **Directory & Lists** button in set up mode.

You must enable the number of custom fields in your directory before you import it.. Custom fields 1-10 are reserved for inbound directories. Custom field 1 is the key field for the inbound information stored in custom fields 2-10.

Custom fields 11 through 20 are reserved for delivery directories. Custom field eleven specifically is a key field for all the directory information.



Option Summary	Tracking Terms	Custom Fields	Barcode Filter	Desktop Security	Report Control
Inbound Fields 1-5		Inbound Fields 6-10	Deliver Fields 1-5	Deliver 6-10 and Recipient	
Field 11 Custom 11 <input type="radio"/> Disabled <input checked="" type="radio"/> Text Entry <input type="radio"/> Numbers Only <input checked="" type="radio"/> Each package <input type="radio"/> List <input checked="" type="radio"/> Entry Optional <input type="radio"/> Require Entry <input type="radio"/> List Only <input checked="" type="radio"/> Allow Typing <input checked="" type="checkbox"/> Auto-populate		Field 12 Custom Field 12 <input type="radio"/> Disabled <input type="radio"/> Text Entry <input type="radio"/> Numbers Only <input checked="" type="radio"/> Each package <input type="radio"/> List <input checked="" type="radio"/> Entry Optional <input type="radio"/> Require Entry <input type="radio"/> List Only <input checked="" type="radio"/> Allow Typing <input checked="" type="checkbox"/> Auto-populate <input type="checkbox"/> Read-Only		Field 13 Custom Field 13 <input type="radio"/> Disabled <input type="radio"/> Text Entry <input type="radio"/> Numbers Only <input checked="" type="radio"/> Each package <input type="radio"/> List <input checked="" type="radio"/> Entry Optional <input type="radio"/> Require Entry <input type="radio"/> List Only <input checked="" type="radio"/> Allow Typing <input checked="" type="checkbox"/> Auto-populate <input type="checkbox"/> Read-Only	
Field 14 Custom Field 14 <input type="radio"/> Disabled <input type="radio"/> Text Entry <input type="radio"/> Numbers Only <input checked="" type="radio"/> Each package <input type="radio"/> List <input checked="" type="radio"/> Entry Optional <input type="radio"/> Require Entry <input type="radio"/> List Only <input checked="" type="radio"/> Allow Typing <input checked="" type="checkbox"/> Auto-populate <input type="checkbox"/> Read-Only		Field 15 Custom Field 15 <input type="radio"/> Disabled <input type="radio"/> Text Entry <input type="radio"/> Numbers Only <input checked="" type="radio"/> Each package <input type="radio"/> List <input checked="" type="radio"/> Entry Optional <input type="radio"/> Require Entry <input type="radio"/> List Only <input checked="" type="radio"/> Allow Typing <input checked="" type="checkbox"/> Auto-populate <input type="checkbox"/> Read-Only			

? Help

Define the data entry fields for Receive and Deliver transactions.
 Press F12 to see all 20 Custom Field modes at once.
 Changing Custom Field and Recipient Field settings WILL affect ALL desktops AND mobile devices.

✓ Finish

Figure 54 - Note the Field Numbering Differs From Tabs

Most organizations choose to have field eleven be the full name of the recipient. This allows the other delivery information to be linked to the recipient. Please see the section on **autopopulation** for more information about how custom field eleven, the first custom field reserved for delivery information, is used as a key to the records stored in custom fields 12-20.

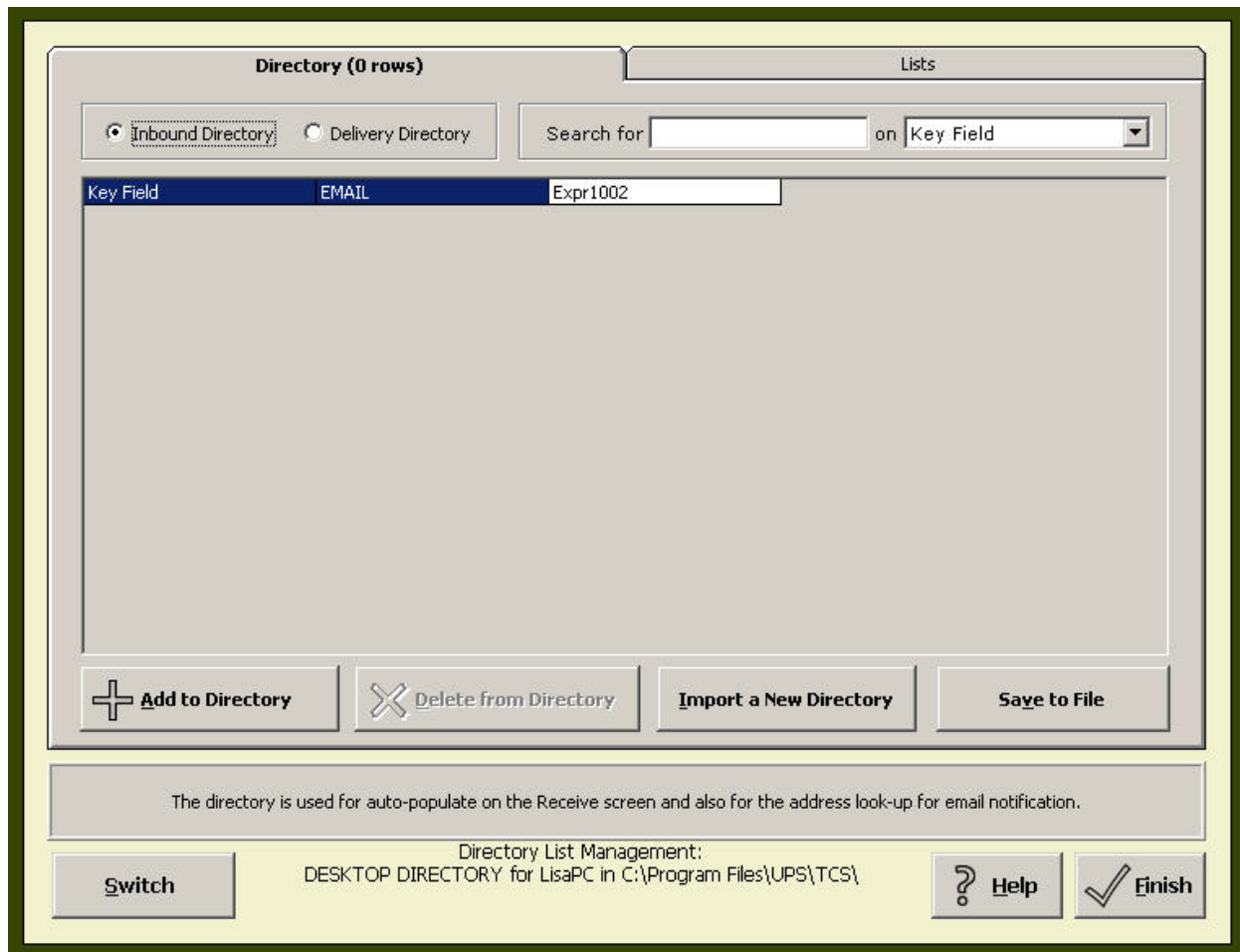


Figure 55 - Import Inbound or Delivery Directories

Basic Custom Field Actions

You must enable custom fields individually before you import a directory or a list. Match how many custom fields you need to enable before you go to the importing Directory & Lists menu, so that when you do import data, it has a place to go. If you do not have right number of custom fields set up properly for each column of data, your data will not import.

For every field (the ten reserved for inbound information and the ten reserved for delivery information), answer the following by clicking on the radio buttons:

1. Is this field **disabled** (i.e., not in use), **text-entry**, or **numbers only** (meaning no words or letters can be input)?
2. Does this field apply to tracking each individual package, or to each list of packages? For example, when inbounding parcels, you may have someone inbound dozens of parcels at a time, and want to track a feature of the group. In that case, the field applies to the "list" instead of to "each package." For example, if you typically have a large volume of parcels from different



carriers, you might want to track carriers in lists—that way, you can enter dozens of parcels before your user has to enter, at the list level, the carrier that dropped all of them off.

3. Is entry optional or required? If you require entry, the user will not be able to continue on in the process (delivery or receiving) without finding a value for that field.
4. Is the field a **list only** (which limits the responses) or can the user type in an entry if the proper response isn't in the list?
5. Does the field **autopopulate**? Data values for fields set to autopopulate will be automatically entered, based on the user's selection from the list for the first custom field. The lists used for autopopulation are stored in one of two directory tables—inbound or delivery. The application uses values from the same row as the value selected for the first field (the key field) to populate other fields. See the section on **Directory & Lists** and also **Trackpad Handheld Setup** for more details on how these settings are used system-wide.



Bar Code Filter

The Bar Code filter can be enabled to capture information from the shipping labels of major carriers. When enabled, the Bar Code Filter will attempt to capture *Carrier*, *Service Level* and *Vendor Identification*. The Bar Code Filter can be enabled for either Inbound and/or Delivery.

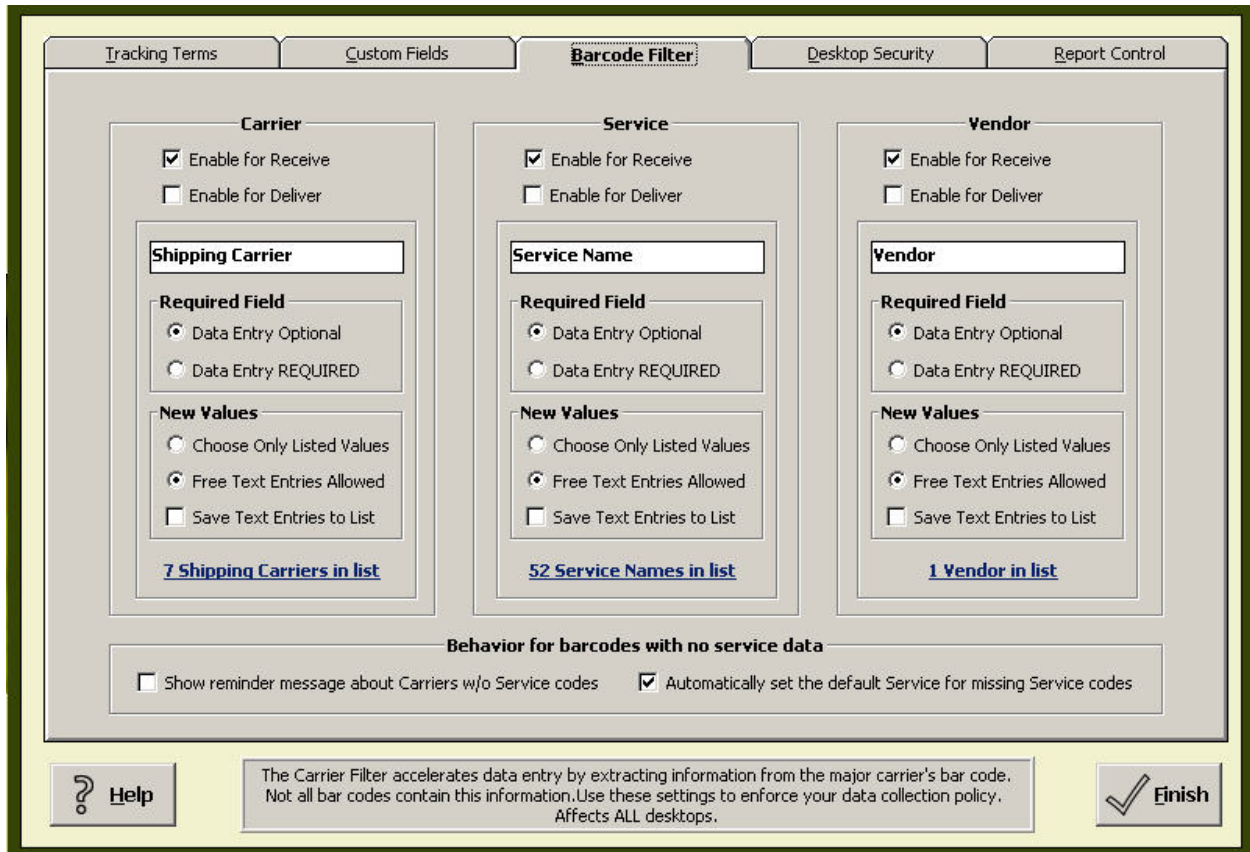


Figure 56 - Barcode Filter Menu

Not all carrier bar codes contain service level and vendor information.

Enable for Inbound/Delivery

This feature can be enabled for Inbound or Desktop. Delivery, and is also available on the HPC. Check or uncheck the desired fields to add Bar Code Filtering.

Shipping Carrier, Service

These are the default names for the Bar Code Filter labels (**Name, Vendor Label**) which can be changed to suit your company's terms.



Required Field

Setting the control to **Entry Optional** (the default) will allow a user to skip the field. **Required Entry** requires the user to enter data for the given field when processing the record, and the user cannot continue until a value is provided.

New Values / Choose Only Listed Values

This setting limits the user to select only the values presented in the list.

Free Text Entries Allowed

This setting allows the user to populate the data entry field with a value that may not be in the list. These values are not saved to the list.

Save Text Entries to List

This allows the user to populate the data entry field with a value that may not be in the list. Values entered will be saved to the list.

Hot link to List Management

Clicking this link will connect you to list management, allowing you to modify, add, or delete list entries for any of your lists.



Desktop Security

You can configure UPS Trackpad to fit your company's unique tracking challenges. Through **Desktop Security**, certain features can be enabled or disabled. When a feature is disabled, it will not be visible to the users. These features can also be put under password protection to ensure that access is granted to the correct individuals.

The changes made here will be stored in the local configuration file and will only affect the local desktop.

You can grant three levels of privilege to a variety of UPS Trackpad desktop functions:

- Full access to all users
- Access with a password only
- No access—the feature is disabled for all users

You can modify privileges for the following functions:

- Inbound parcels
- Delivery parcels
- Quick search
- Advanced search
- Reports
- DIAD transfer
- Trackpad transfer
- UPS Trackpad administrative setup

Please be aware that if you allow unprotected access to UPS Trackpad set up, all of the settings and information on your system, including company directory information, system functionality, and transaction data, will be available to anyone working from a UPS Trackpad desktop.



Tracking Terms	Custom Fields	Barcode Filter	Desktop Security	Report Control
----------------	---------------	----------------	-------------------------	----------------

<p>Inbound Parcels</p> <p><input checked="" type="radio"/> full access to all users</p> <p><input type="radio"/> user password required</p> <p><input type="radio"/> DISABLED</p>	<p>Deliver Parcels</p> <p><input checked="" type="radio"/> full access to all users</p> <p><input type="radio"/> user password required</p> <p><input type="radio"/> DISABLED</p>	
<p>Quick Search</p> <p><input checked="" type="radio"/> full access to all users</p> <p><input type="radio"/> user password required</p> <p><input type="radio"/> DISABLED</p>	<p>Advanced Search</p> <p><input checked="" type="radio"/> full access to all users</p> <p><input type="radio"/> user password required</p> <p><input type="radio"/> DISABLED</p>	<p>Reports</p> <p><input checked="" type="radio"/> full access to all users</p> <p><input type="radio"/> user password required</p> <p><input type="radio"/> DISABLED</p>
<p>DIAD Transfer</p> <p><input checked="" type="radio"/> full access to all users</p> <p><input type="radio"/> user password required</p> <p><input type="radio"/> DISABLED</p>	<p>Trackpad Transfer</p> <p><input checked="" type="radio"/> full access to all users</p> <p><input type="radio"/> user password required</p> <p><input type="radio"/> DISABLED</p>	<p>UPS Trackpad Setup</p> <p><input type="radio"/> NO PASSWORD</p> <p><input checked="" type="radio"/> SETUP password prompt</p>

<p> Help</p>	<p>Set the security features for UPS Trackpad. You can restrict access to certain features, or disable them all together. If no User Password is set, the Administrator password will be used. NOTE: Security settings affect this desktop ONLY.</p>	<p> Finish</p>
---------------------	--	-----------------------

Figure 57 - Desktop Security Menu



Report Control

Report Control gives you the ability to enable or disable individual standard reports. Before this menu works, you must make sure reports are enabled from the Desktop Security menu. In addition to allowing you to enable or disable the standard individual reports, the Report Control menu allows you to assign a path to a custom report target you have created using standard arguments. If you take advantage of this feature, the Custom Report you build will be accessible from the **Parcel Reports** menu within User mode.

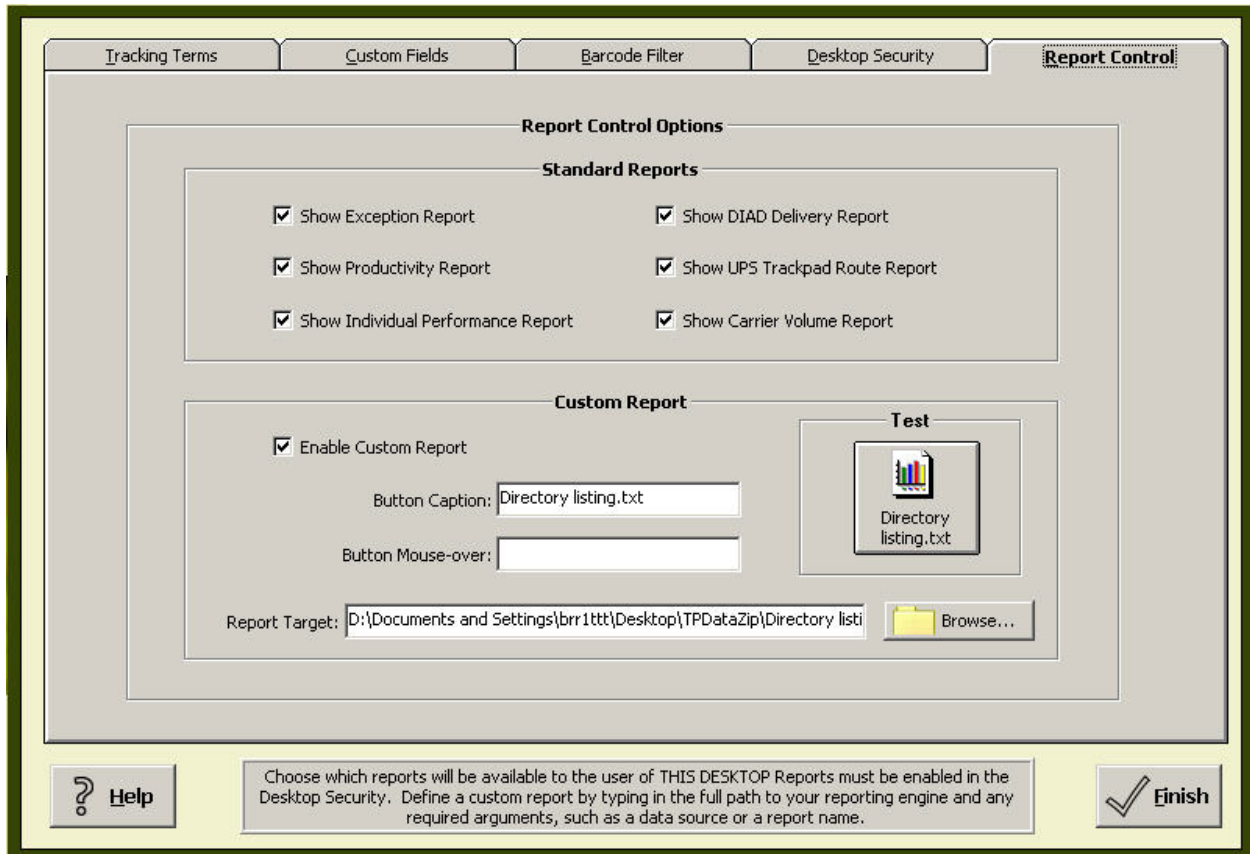


Figure 58 - Report Control Menu

STANDARD REPORTS

These boxes control the display of the reports at the local desktop level. Checking a box makes the report available on the desktop user's **Parcel Reports** screen, accessed from User Mode, and un-checking disables it. The reports available are:

- Exception report
- Productivity report
- Individual performance report
- DIAD delivery report



- Route report
- Carrier volume report

The Carrier Volume Report will not show unless the **Bar Code Filter** is enabled. Barcode filtering can be modified on the BarCode filter tab of this menu.

CUSTOM REPORT

Enabling the Custom Report allows you to link to a report outside of UPS Trackpad from the **Parcel Report** screen. You can customize the button caption and the text that appears when a user rolls the mouse over the button. Type in the path to the report or browse to select it. This button can be enabled to launch **any** file or report created externally that uses Trackpad system data.



Directory & Lists Menus

From the **Setup Menu**, click on the **Directory and Lists** Button to manage the Company Directory, Drop-Down Lists, and Directory Usage Detail. Correct use of the directories and lists enhances your overall system performance.

TWO COMPANY DIRECTORIES

One of the key features in Trackpad 4.0 is the expansion from five custom fields that created "the company directory" to twenty custom fields. This change means you can have two directories in UPS Trackpad 4.0—one directory to track up to ten fields of inbound information, and another directory to track up to ten fields of delivery information.

Using inbound and delivery directories offers several benefits:

- Standardize the information you enter into Trackpad for clear reporting
- Reduce data entry errors
- Speed the delivery process
- Increase accuracy

Information you import through the company directory feature is used directly by the **Auto-Populate** function and **Email Notification**.

SETTING UP YOUR COMPANY DIRECTORIES

To use a company directory, follow this procedure.

PREPARE YOUR DIRECTORY DATA

1. First, decide which custom fields you'd like to track when INBOUNDING parcels. Then decide which custom fields you'd like to record for DELIVERY procedures. You may have up to ten of each.
2. Use Microsoft Excel or another spreadsheet program to organize this data. Name the inbound directory and the delivery directory separately. For example, the inbound directory may be named inbound.csv and the delivery directory might be delivery.csv.
3. In the spreadsheet, your first row should contain headers—the categories that describe the data, such as "recipient" or "profit center."
4. Save your spreadsheets as either a .csv (comma separated values) or as a .txt (with tab-separated values). If one of your fields has a comma in it, then it is better to save your file as a .txt with tab-separated values.



	A	B	C	D	E
1	Name	DEPT	ProfitCenter	EXT	Email
2	Adee, Christine L.	Marketeting	120910	114	adee@abc.com
3	Allen, Michael A.	Marketeting	120910	847	all@abc.com
4	Amidzich, Michael R.	Marketeting	120910	343	and@abc.com
5	Anderson, Dee	Sales	120900	738	bag@abc.com
6	Bagley, Lynn	Accounting	900000	542	bal@abc.com
7	Baldwin, Kim L.	Accounting	900000	432	bar@abc.com
8	Barnes, David R.	PR	149922	673	bar2@abc.com
9	Barratt, Kalisa B.	PR	149922	321	bau@abc.com
10	Baumgardt, Carrie A.	HR	600000	343	ben@abc.com
11	Bennett, Ella	HR	600000	987	ben@abc.com
12	Berger, Sandra J.	ExecOffice	100000	896	berth@abc.com

Figure 59 - Example of a Company Directory File in MS Excel

ENABLE CUSTOM FIELD SETTINGS

- Once you know how many columns of data are in your company's directory files, then you enable inbound and delivery custom fields to receive that data on the **custom fields** tab of the **custom options** menu.
- The first two tabs in the Custom Fields submenu are for inbound information— Inbound Fields 1-5 and 6-10. These fields are given field numbers 1-10.
- The last two tabs within the Custom Fields submenu are for delivery information-- Delivery Fields 1-5 and 6-10. These fields are given field numbers 11-20.

Please note you have to Look BELOW the tab level to see the actual names of the custom fields. For example, the first delivery custom field is field number 11, and it is the key field for your delivery directory. For the inbound directory, the first column is "field 1," and that is your inbound directory key field.

- Name custom fields in a corresponding fashion to the header names for the data you will be importing—for example, type "profit center" for the third custom field when you wish to populate profit center values imported from the third column of your company inbound directory file.
- Then, determine the settings for each custom field by clicking either **text entry** or **numbers only**. For instance, if your directory is like the sample in the figure above, with five columns of data, you will enable five columns. Because two of the columns (extension and profit center) are populated entirely with numbers, you would select "numbers only" for those two columns.
- Finish setting appropriate parameters for each custom field you will be using. (For more information on filling out custom fields, refer to the section of the user guide on the **Custom Fields** submenu.)



Option Summary		Tracking Terms		Custom Fields		Barcode Filter		Desktop Security		Report Control	
Inbound Fields 1-5			Inbound Fields 6-10			Deliver Fields 1-5			Deliver 6-10 and Recipient		
Field 16 Supervisor		Field 17 Department		Field 18 Profit Center		Field 19 Custom Field 19		Field 20 Custom Field 20		(Recipient) Recipient	
<input type="radio"/> Disabled <input checked="" type="radio"/> Text Entry <input type="radio"/> Numbers Only		<input type="radio"/> Disabled <input checked="" type="radio"/> Text Entry <input type="radio"/> Numbers Only		<input type="radio"/> Disabled <input checked="" type="radio"/> Text Entry <input type="radio"/> Numbers Only		<input checked="" type="radio"/> Disabled <input type="radio"/> Text Entry <input type="radio"/> Numbers Only		<input checked="" type="radio"/> Disabled <input type="radio"/> Text Entry <input type="radio"/> Numbers Only		<input type="radio"/> Disabled <input checked="" type="radio"/> Text Entry <input type="radio"/> Numbers Only	
<input type="radio"/> Each package <input checked="" type="radio"/> List		<input type="radio"/> Each package <input checked="" type="radio"/> List		<input type="radio"/> Each package <input checked="" type="radio"/> List		<input checked="" type="radio"/> Each package <input type="radio"/> List		<input checked="" type="radio"/> Each package <input type="radio"/> List		<input type="radio"/> Parcel <input checked="" type="radio"/> List	
<input checked="" type="radio"/> Entry Optional <input type="radio"/> Require Entry		<input checked="" type="radio"/> Entry Optional <input type="radio"/> Require Entry		<input checked="" type="radio"/> Entry Optional <input type="radio"/> Require Entry		<input checked="" type="radio"/> Entry Optional <input type="radio"/> Require Entry		<input checked="" type="radio"/> Entry Optional <input type="radio"/> Require Entry		<input checked="" type="radio"/> Entry Optional <input type="radio"/> Require Entry	
<input type="radio"/> List Only <input checked="" type="radio"/> Allow Typing		<input type="radio"/> List Only <input checked="" type="radio"/> Allow Typing		<input type="radio"/> List Only <input checked="" type="radio"/> Allow Typing		<input type="radio"/> List Only <input checked="" type="radio"/> Allow Typing		<input type="radio"/> List Only <input checked="" type="radio"/> Allow Typing		<input type="radio"/> List Only <input checked="" type="radio"/> Allow Typing	
<input type="radio"/> Disabled <input checked="" type="radio"/> Text Entry <input type="radio"/> Numbers Only		<input type="radio"/> Disabled <input checked="" type="radio"/> Text Entry <input type="radio"/> Numbers Only		<input type="radio"/> Disabled <input checked="" type="radio"/> Text Entry <input type="radio"/> Numbers Only		<input checked="" type="radio"/> Disabled <input type="radio"/> Text Entry <input type="radio"/> Numbers Only		<input checked="" type="radio"/> Disabled <input type="radio"/> Text Entry <input type="radio"/> Numbers Only		<input type="radio"/> Disabled <input checked="" type="radio"/> Text Entry <input type="radio"/> Numbers Only	
<input type="radio"/> Each package <input checked="" type="radio"/> List		<input type="radio"/> Each package <input checked="" type="radio"/> List		<input type="radio"/> Each package <input checked="" type="radio"/> List		<input checked="" type="radio"/> Each package <input type="radio"/> List		<input checked="" type="radio"/> Each package <input type="radio"/> List		<input type="radio"/> Parcel <input checked="" type="radio"/> List	
<input checked="" type="radio"/> Entry Optional <input type="radio"/> Require Entry		<input checked="" type="radio"/> Entry Optional <input type="radio"/> Require Entry		<input checked="" type="radio"/> Entry Optional <input type="radio"/> Require Entry		<input checked="" type="radio"/> Entry Optional <input type="radio"/> Require Entry		<input checked="" type="radio"/> Entry Optional <input type="radio"/> Require Entry		<input checked="" type="radio"/> Entry Optional <input type="radio"/> Require Entry	
<input type="radio"/> List Only <input checked="" type="radio"/> Allow Typing		<input type="radio"/> List Only <input checked="" type="radio"/> Allow Typing		<input type="radio"/> List Only <input checked="" type="radio"/> Allow Typing		<input type="radio"/> List Only <input checked="" type="radio"/> Allow Typing		<input type="radio"/> List Only <input checked="" type="radio"/> Allow Typing		<input type="radio"/> List Only <input checked="" type="radio"/> Allow Typing	
<input type="radio"/> Disabled <input checked="" type="radio"/> Text Entry <input type="radio"/> Numbers Only		<input type="radio"/> Disabled <input checked="" type="radio"/> Text Entry <input type="radio"/> Numbers Only		<input type="radio"/> Disabled <input checked="" type="radio"/> Text Entry <input type="radio"/> Numbers Only		<input checked="" type="radio"/> Disabled <input type="radio"/> Text Entry <input type="radio"/> Numbers Only		<input checked="" type="radio"/> Disabled <input type="radio"/> Text Entry <input type="radio"/> Numbers Only		<input type="radio"/> Disabled <input checked="" type="radio"/> Text Entry <input type="radio"/> Numbers Only	
<input type="radio"/> Each package <input checked="" type="radio"/> List		<input type="radio"/> Each package <input checked="" type="radio"/> List		<input type="radio"/> Each package <input checked="" type="radio"/> List		<input checked="" type="radio"/> Each package <input type="radio"/> List		<input checked="" type="radio"/> Each package <input type="radio"/> List		<input type="radio"/> Parcel <input checked="" type="radio"/> List	
<input checked="" type="radio"/> Entry Optional <input type="radio"/> Require Entry		<input checked="" type="radio"/> Entry Optional <input type="radio"/> Require Entry		<input checked="" type="radio"/> Entry Optional <input type="radio"/> Require Entry		<input checked="" type="radio"/> Entry Optional <input type="radio"/> Require Entry		<input checked="" type="radio"/> Entry Optional <input type="radio"/> Require Entry		<input checked="" type="radio"/> Entry Optional <input type="radio"/> Require Entry	
<input type="radio"/> List Only <input checked="" type="radio"/> Allow Typing		<input type="radio"/> List Only <input checked="" type="radio"/> Allow Typing		<input type="radio"/> List Only <input checked="" type="radio"/> Allow Typing		<input type="radio"/> List Only <input checked="" type="radio"/> Allow Typing		<input type="radio"/> List Only <input checked="" type="radio"/> Allow Typing		<input type="radio"/> List Only <input checked="" type="radio"/> Allow Typing	

?
Help

Define the data entry fields for Receive and Deliver transactions.
Press F12 to see all 20 Custom Field modes at once.
Changing Custom Field and Recipient Field settings WILL affect ALL desktops AND mobile devices.

✓
Finish

Figure 60 - Selecting and Enabling Custom Fields

Be precise in the number of custom fields you activate. If you import a file with more columns than you have opened custom fields for, the data in those columns will not be imported. Conversely, if you open more custom fields than you have data for, you will have blank fields on your inbound or outbound menus and encourage random data entry as well as a larger database size.

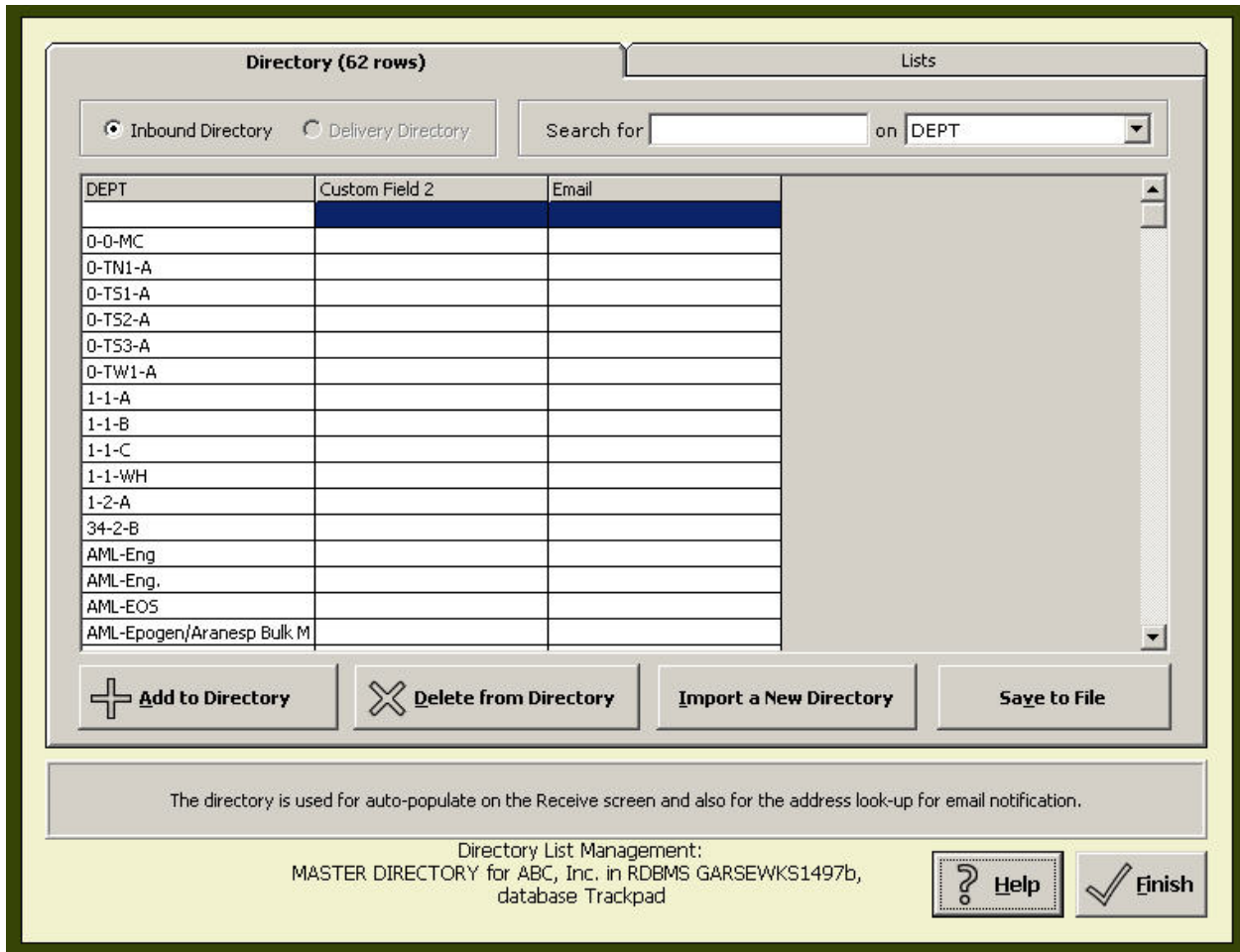


Figure 61 - Directory & Lists Menu

IMPORT COMPANY DIRECTORIES

Click the **Directory and Lists** button on the Trackpad main screen in user mode. On the Directory tab, click **Delivery Directory** or **Inbound Directory**, whichever is accurate, then **Import a New Directory**.

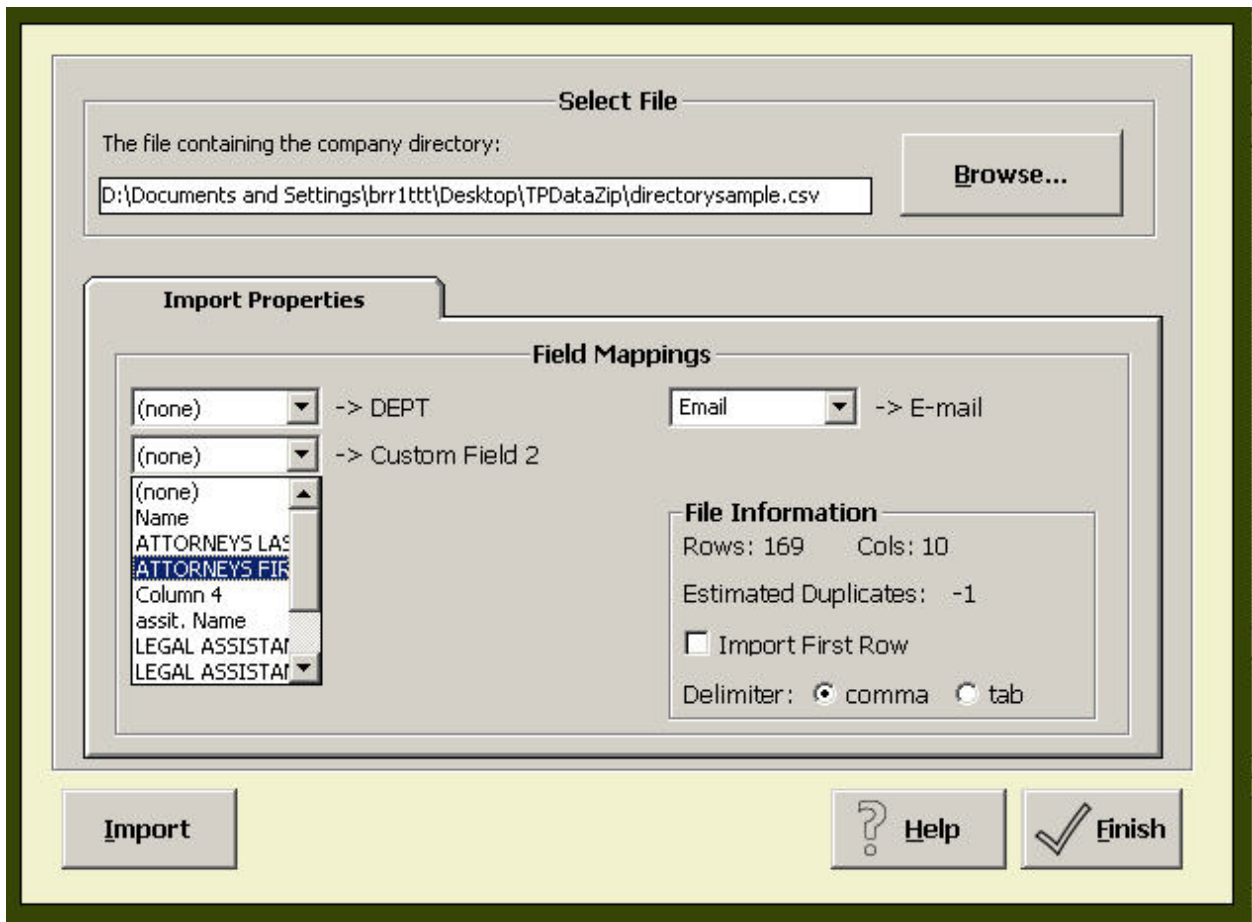


Figure 62 - Directory Import Management Menu

Browse to your file's location, and then choose field mapping so that the appropriate field in your file (such as email) matches with the data Trackpad expects.

- If your data does not have a header row, check "import first row." Specify whether the file is comma or tab delimited. Then click **Import**. You've successfully imported a company directory. As your organization updates its information, you can import new files, or make changes from within Trackpad.

Now import the other directory (inbound or delivery) in the same manner.

It is highly recommended that you maintain the imported directory files and keep your directories up to date. Repeat the import process each time the inbound or delivery directory data changes.

However, if you cannot do an import process right away, there are several ways Trackpad helps you manage a directory that you've already imported. Those functions are:

ADD TO DIRECTORY

You can add or change information to either company directory by clicking **Add to Directory**. Trackpad's Directory Management menu launches and allows you to navigate through your records and add or update your data.



UPS Trackpad Directory Management

— Add to the Receive directory

DEPT

Custom Field 2

EMAIL:

? Help Update Cancel Browse Refresh (F5) ✓ Finish

◀ Add record ▶▶

Figure 63 - Directory Management Menu

DELETE FROM DIRECTORY

To delete a record from the directory, highlight the row you wish to delete and click **Delete From Directory**. Trackpad will confirm any record you wish to delete.

Fields in the directory are the only ones that can be set to autopopulate. (This is because the autopopulate feature is depending on having a key—field one for inbound directories and field eleven for delivery directories. The key value is used to populate the other data in the row.) Lists for fields set to **autopopulate** from the directory are thus always the same as the corresponding column in the directory, and cannot be edited in the list tab. (For more information on updating the Lists, see the **List Tab** under the Directory and Lists Button.)

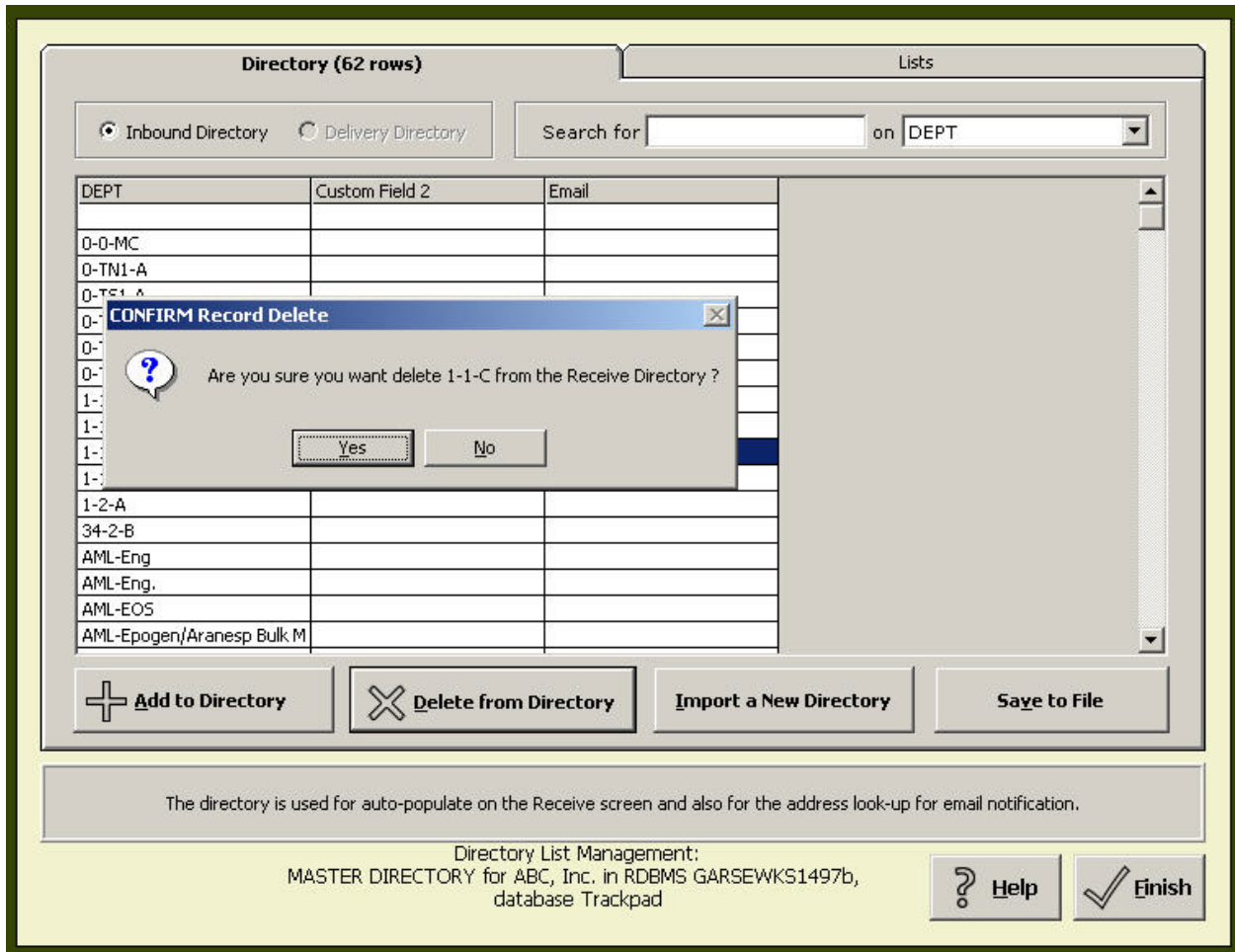


Figure 64 - Deleting from Directory

IMPORT A NEW DIRECTORY

This feature allows you to import directory information. The import file utility supports both .csv (comma separated value) and .txt (tab delimited) files.

1. Choose **inbound directory** or **delivery directory**
2. Tap **Import a New Directory**
3. Follow the prompts.



SPEEDING DATA ENTRY WITH LISTS

Now that Trackpad has your company's data, it's time to drive it to the users through the use of lists. Click on the second tab in the menu—**Lists**.

Directory (62 rows)

Lists

1. Select List

Select the list you wish to edit:

2. Clear List

Delete all of the current entries in the selected list

3. Import List

Use the directory to fill in the list.

4. Edit List (170 Items)

Adee, Christine L.
 Allen, Michael A.
 Amidzich, Michael R.
 Anderson, Dee
 Bagley, Lynn
 Baldwin, Kim L.
 Barnes, David R.
 Barratt, Kalisa B.
 Baumgardt, Carrie A.
 Bennett, Ella
 Berger, Sandra J.
 Berthelsen, Gilbert J.
 Bevan, Lee A.
 Bisbach, Vicky L.
 Boxer, Terri S.
 Brennan, Nancy M.
 Brodie, Sandra C.
 Brooks, Christy A.

The lists are used on both the Handheld and the PC to help speed up the data entry process and reduce errors.

Directory List Management:
 MASTER DIRECTORY for ABC, Inc. in RDBMS GARSEWKS1497b,
 database Trackpad

Figure 65 - Lists Menu

Trackpad uses a “list” when it populates a field with a drop-down list. Lists can help you enter repetitive data into the system. You set them up with frequently used entries that can then be selected by the user for inbound or delivery on the desktop or for download to the HPC units.

Lists save your users time as they don't have to manually key information into the Custom Fields for each record. It's not the same as the autopopulate feature that works in tandem with company directories however—with a list, the user makes a selection from the LIST. The user has to scroll through the list. With autopopulation, values set to autopopulate are pre-selected and the user does not have to scroll to choose them—they appear in a truly automated fashion.



You can have a list for each custom field you use, and you can also have a custom recipient list—that’s twenty-one separate kinds of custom information you can expedite with lists.

Let’s see an example of the list in action. Let’s assume there are a certain group of employees that receive parcels from your operation—recipients. Under the **Directory & Lists** button of the set up screen, choose the tab **Lists**. In section 1, Select Lists, scroll to **Recipient**. In Section 3, Import List, click **Import List**. You have two choices. If you have imported a company directory and RECIPIENT is one of your header rows, then you can allow the recipient list to populate itself from your company directory. If you do not have a recipient list in your company directory, then you can choose to upload a comma-separated value (.csv) file with your list of recipients. In Section 4, you can also manually add and remove names from your recipient list.

Recipients will be pre-populated into the recipient field for each handheld using the system. Your users won’t have to type names any more, but instead will scroll through names in a drop down list. If they choose to type because it’s faster than scrolling, Trackpad’s smart-search capability will help them narrow the list as they type.



Figure 66 - Using Recipient Lists

LISTS AND THE COMPANY DIRECTORY

Lists for custom fields set to autopopulate are automatically filled with values from the corresponding column of the relevant company directory (either the inbound directory or the delivery directory). If you choose to enable an additional custom field—one that is not populated by the company directory—the list for that field must be independently managed from inside the list tab in Directory & Lists.

Lists set to autopopulate are actually columns from the company directory, so you will not be able to edit them here. You can, however, view them.



USING LISTS

The list menu has several features you will want to be acquainted with. The first section, **Select List**, is where you choose the list you wish to work with. **You will have as many choices as you have enabled custom fields.** Remember, you can't edit lists that are set to autopopulate from the company directory—for that, you have to import a new directory. But as long as they are not autopopulated from one of the directories, you can edit lists from this menu. (See section on the custom field menu if this doesn't make sense.)

Trackpad also features several pre-populated lists you may edit. Those include:

- Shipping carrier. (Most major carriers are already populated for you.)
- Service levels. (Many standard services for each carrier are pre-populated.)
- Vendors.

The second section, **Clear List**, allows you to completely empty the information in that field. For example, if you had selected "recipient list" in section one of the submenu, and then selected "clear list," your entire list of recipients would be deleted. (However, it would not be deleted from your company directory.) Clearing a list is useful if you are about to re-import more accurate data. Once you tell Trackpad to clear a list, the data is deleted and this cannot be undone.

It is possible to import from the directory, but it's an unwieldy scenario. First, you'd have to import a directory. Then, in Custom fields, you'd need to remove the autopopulate attribute from the fields you want to edit. After your edits are done, you have to return to Custom Fields and reset the autopopulation attributes. Most users prefer to simply upload a revised company directory.

The third section, **Import List**, gives you two options: to import a list directly from a file or to automatically match the list to your company directory.

Since directory lists are not editable, this process has only one option—to import from a file. The file should be a single column, in .txt or .csv format.

When you select a file, Trackpad will import the first column of data in that file. Make sure the column has a header row. If there is no header row, because Trackpad assumes one exists, you will lose your first record.

USING LOCAL DROP-DOWN LISTS

The UPS Trackpad HPC displays a list of data entry options for each **custom field**. The lists for each custom field and the recipient field are stored in the UPS Trackpad directory database (tcs_list.mdb) and can be modified through the **Directory & Lists** menu. This is enough customization for some clients.

However, in large installations, you may want to further refine the lists sent to each HPC. This creates specific routes for HPCs that always perform delivery to a specific floor, department, or building. This feature of Trackpad is called a "tailored drop-down list," which is a fancy way of saying the lists your handheld devices have access to are stored locally on the desktop instead of in the network or server location of the Trackpad Central System (TCS).



In a network or SQL configuration, you can tailor the lists available to each local handheld by following this procedure.

1. From the setup screen, click the **System Setup** button (the first button).
2. Navigate to the second tab, Desktop Set Up. Check the **Local Handheld Lists** checkbox.

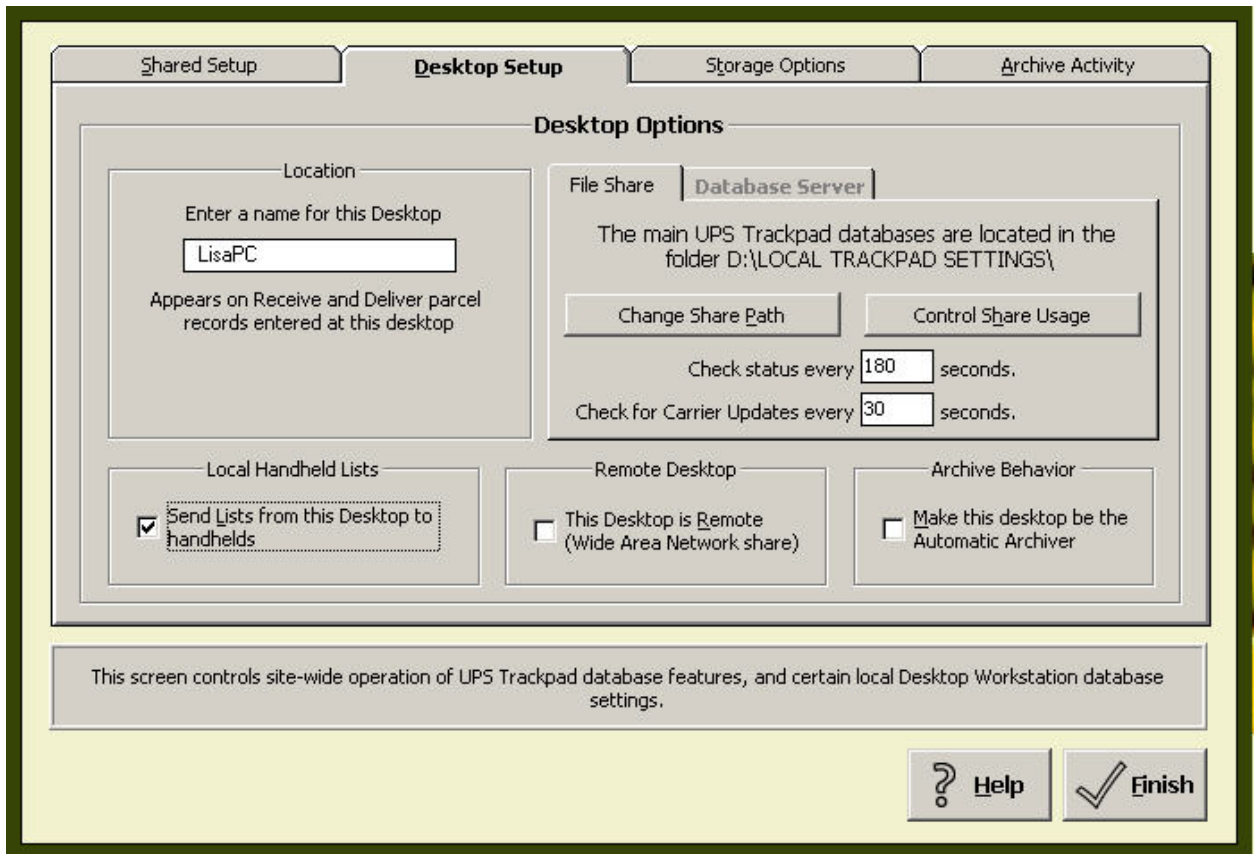


Figure 67 - Creating Local Handheld Lists

3. If the box is grayed out and unavailable, it is because you are running Trackpad out of the local directory. The default local directory setting is C:\ProgramFiles\UPS\TCS. You will need to deploy a file share in order to keep local handheld lists. Create a folder adhering to Trackpad sharing and NTFS permissions requirements. From the Trackpad set up screen, navigate to **System Setup -> Shared Setup -> Move shared files**. Type in the path to the folder you created. Trackpad will automatically move the necessary files and connect to the new location. The local handheld list option will now be available.
4. Now that you have your keep local lists option available, it's time to create "tailored" editions of it for each handheld. (A tailored list is simply a separate copy of the master tcs_list.mdb file which has been named to correspond to a particular HPC.) Users often do this by modifying one of the local company directories in Trackpad to the specifications required for an individual HPC. The name of the file you modify is **TCS_LIST.mdb**. Once modifications are made, the file is named to reflect its service



to an individual HPC. (If the original file contains data you wish to preserve, first make a copy of before you start making modifications.)

5. When you name the streamlined file, be sure to follow the naming conventions precisely. The naming convention for a tailored list file is to append an underscore and the numeric device ID of the HPC. See the table for examples. If you do not know how to change your device IDs, see the following section, **Changing Device IDs**.
6. If you did make a copy of the local database file, be sure to rename it back to TCS_LIST.mdb or Trackpad will create a new, empty database the next time it is restarted.

Here's an example of how local lists can be deployed among five handheld units:

UPS Trackpad Device ID:	TCS_LIST file name:	Lookup lists in file:
1	Tcs_list_1.mdb	Lists for the 1 st floor
2	Tcs_list_2.mdb	Lists for the 2 nd floor
10	Tcs_list_10.mdb	Lists for building #10
25	Tcs_list_25.mdb	Lists for building #25
198	Tcs_list_198.mdb	Lists for manufacturing shop.

CHANGING DEVICE IDS

It's easy to change device IDs. Any valid device ID (1 to 253) can be used. Each time a handheld device syncs with Trackpad central, you have the opportunity to change its device ID and update its registration. Here's the procedure to change a device ID:

1. Make sure your HPC is able to connect to the Trackpad central system and your desktop computer is running UPS Trackpad.
2. Hit **Transfer**.
3. The Trackpad desktop will give you an initial menu screen. Make sure **Register Handheld** is checked under **Transfer Options**.
4. You will then be able to alter the User Name and the Device ID before clicking "continue" to finish the data transfer.

See **Trackpad Handheld Setup** for more HPC configuration details.



Figure 68 - Transfer Menu Allows Changing Device ID

When the UPS Trackpad desktop detects a handheld device ID during the infrared transfer process, it first searches the local directory for a tailored list. If UPS Trackpad doesn't find a list file matching the ID, it will send the default local list instead—in other words, “the full list” or the master file, `tcs_list.mdb`.

If the **Local Handheld List** checkbox is enabled, the lists are located in `C:\Program Files\UPS\TCS\TCS_List.mdb` file by default. If local lists are not checked, the desktop will send lists from the shared database location.

SENDING THE SAME LIST TO SEVERAL HPCS

To send the same set of local lists to more than one UPS Trackpad HPC, copy the `tcs_list_X.mdb` file, and rename the numeric suffix “X” to match the ID number of the additional HPCs. So for example, if you want five HPCs for a certain building where you have 80 personnel, you would adapt this procedure:

1. Set unique device IDs for the HPCs during the transfer process. Let's say 20, 30, 40, 50, and 60, because we are configuring five HPCs in this hypothetical example.
2. Create your list, `tcs_list_x.mdb`.
3. Save and rename the same list five times:
 - a. `Tcs_list_20.mdb`
 - b. `Tcs_list_30.mdb`
 - c. `Tcs_list_40.mdb`
 - d. `Tcs_list_50.mdb`



e. Tcs.list_60.mdb

4. Place these five files in the TCS folder on your local Trackpad desktop system.

LOCAL VS. SHARED LISTS

When you enable local lists through keeping a local copy of your storage, list, and setting files (i.e., tcs_stor.mdb, tcs_list.mdb, and tcs_sys4.ini.mdb respectively), Trackpad will prompt you each time you enter the **Directory & Lists** button to specify which set of lists you wish to modify—the local one or the shared central system one. The shared company directory list is available to all handhelds that are not using local lists. The local lists are available in “THIS DESKTOP’s” company directory list.

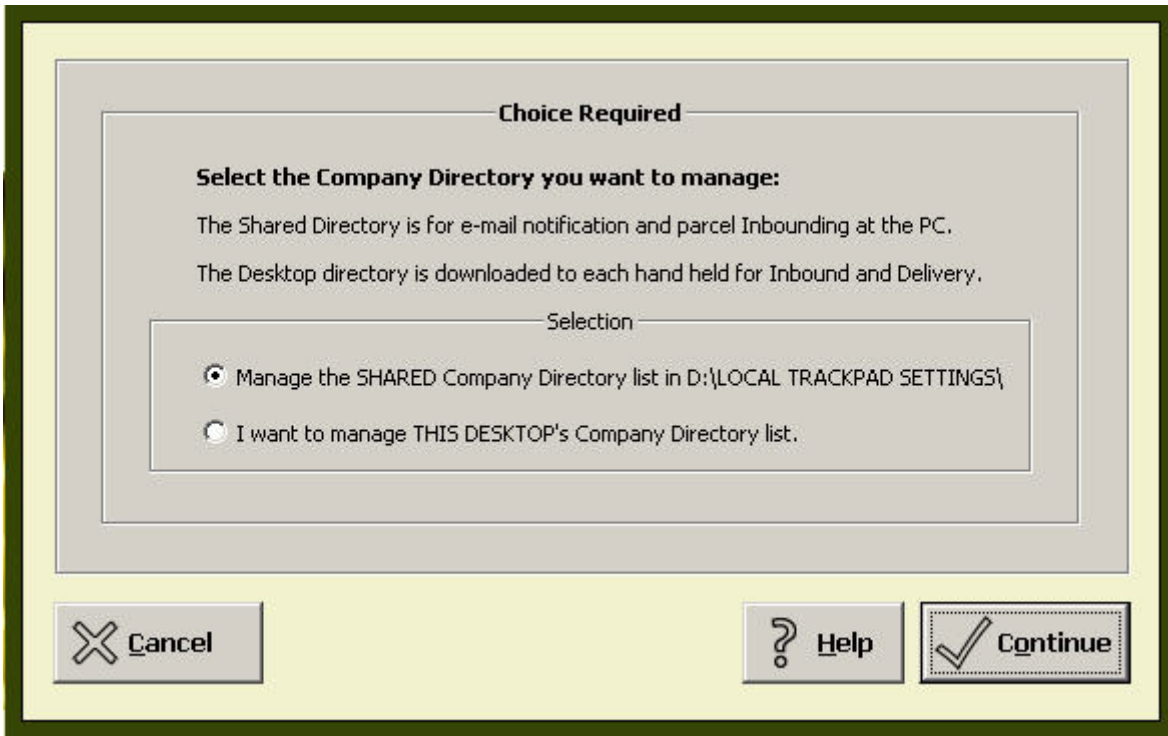


Figure 69 - Selecting Local or Shared Versions of Company Directories

Similarly, when you are managing Lists from the list menu, you’ll have the option to switch between local and system-wide settings through the “Switch” button.

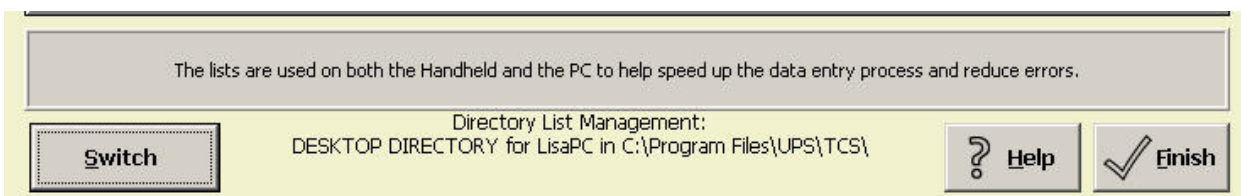


Figure 70 - “Switch” Allows Toggling Between Local and System-wide Lists



Email Notification

Email notification allows you to automate communication about packages your area has received and delivered. This can be a useful feature if your recipients or managers wish to be informed of receiving or delivery events. Especially in an environment where sometimes a colleague can sign for the packages of another, enabling email notification on delivery means that the actual person the package was meant for is always notified (by email). This can cut down on support time in the mail room and help recipients in your organization feel informed.

There are two basic actions that can trigger an automated email when working on the desktop. (HPCs cannot trigger email notification until they are synched with Trackpad's central system on the desktop.)

1. Receiving a package
2. Delivering a package.

The text of your automated messages and how much information it contains can also be configured from this menu.

SETTING UP AUTOMATED EMAIL NOTIFICATIONS

To enable automated emails, do the following:

1. Open the Email Settings menu under the Email Notification button and check **Enable Email Notification**.
2. Under Mail Configuration, inform Trackpad what kind of email environment it is working in. **Address Type** defaults to SMTP, which is typical. Check with your email administrator to confirm what kind of outgoing mail protocol is in use at your organization.
 - a. Inform Trackpad of the MAPI mail profile in use. MAPI stands for **M**essaging **A**pplication **P**rogramming **I**nterface. Most systems running Windows 2000 or later will have MAPI, which is a Microsoft Windows interface that enables different email applications later than Outlook 98 to work together to distribute mail. Trackpad email notification requires a MAPI- compliant mail system.

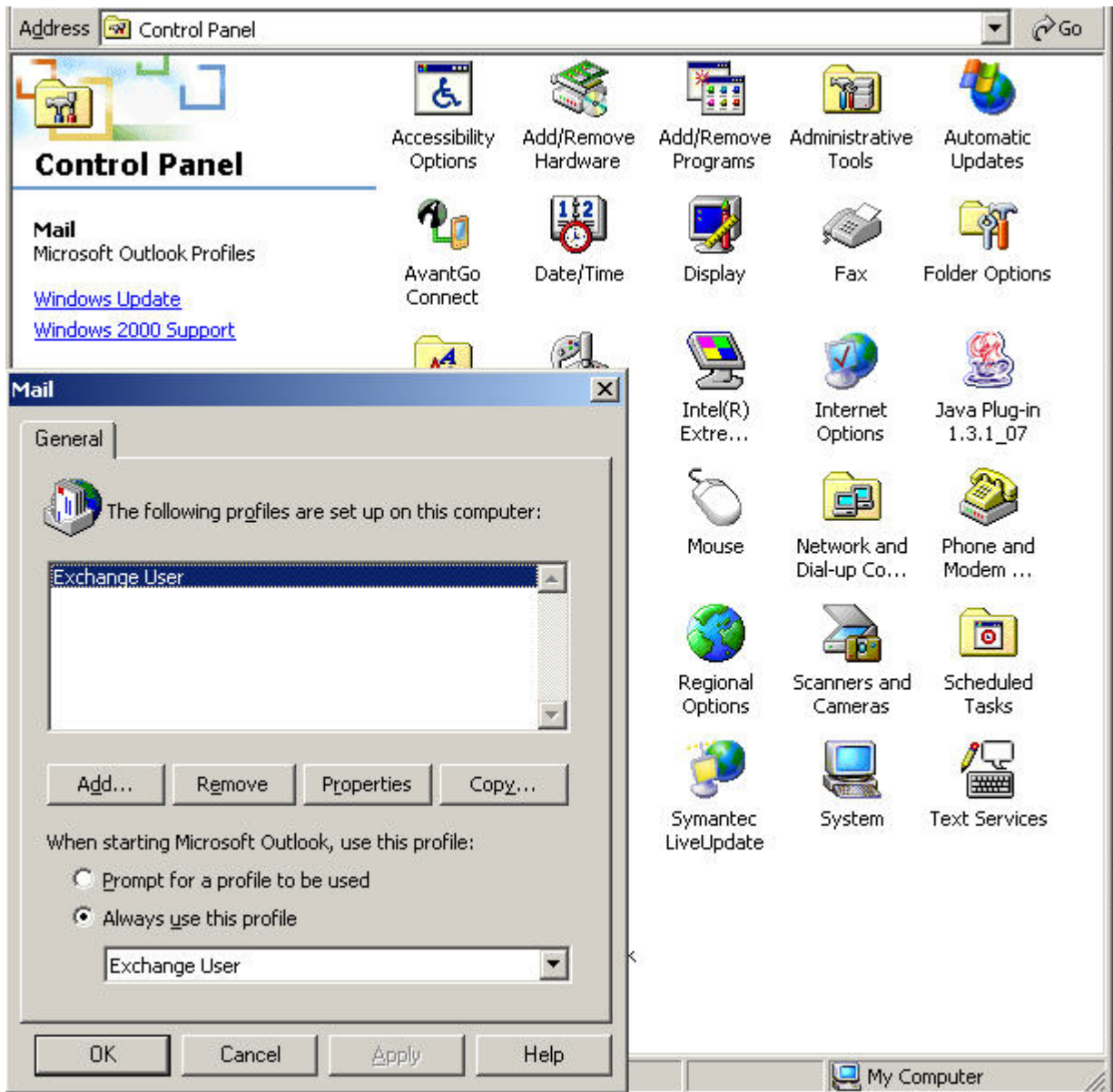


Figure 71 - Finding Profile Name Using Mail Control Panel Properties

- a. Check with your network administrator for the proper setting for your installation. **Profile Name** must already exist. Your network administrator should be able to provide you with this information or you can Look in your computer's control panels, and choose the "Mail" control panel. Right click for properties, and click Show Profiles. You should see your profile name. Some email clients do not use a profile name, in which case, you can enter anything you like next to Profile Name—but you cannot leave this field blank.

You will also need to provide Trackpad with a list of current email addresses. If you are maintaining a delivery company directory, include a column for emails. This tends to work best if your delivery directory has the recipient name as the first column (field 11), and email as a subsequent column. That way, Trackpad can Look up the recipient in column one,



and then find the right email address in the same row. (Refer to the section on Directory & Lists if this does not make sense.)

NOTIFICATION RULES

Notification Rules are used by UPS Trackpad to determine when to send an email message and what message to send. The system can send an email to the recipient when you inbound a parcel, deliver a parcel, or at both events, and the default message text can be different for each desktop.

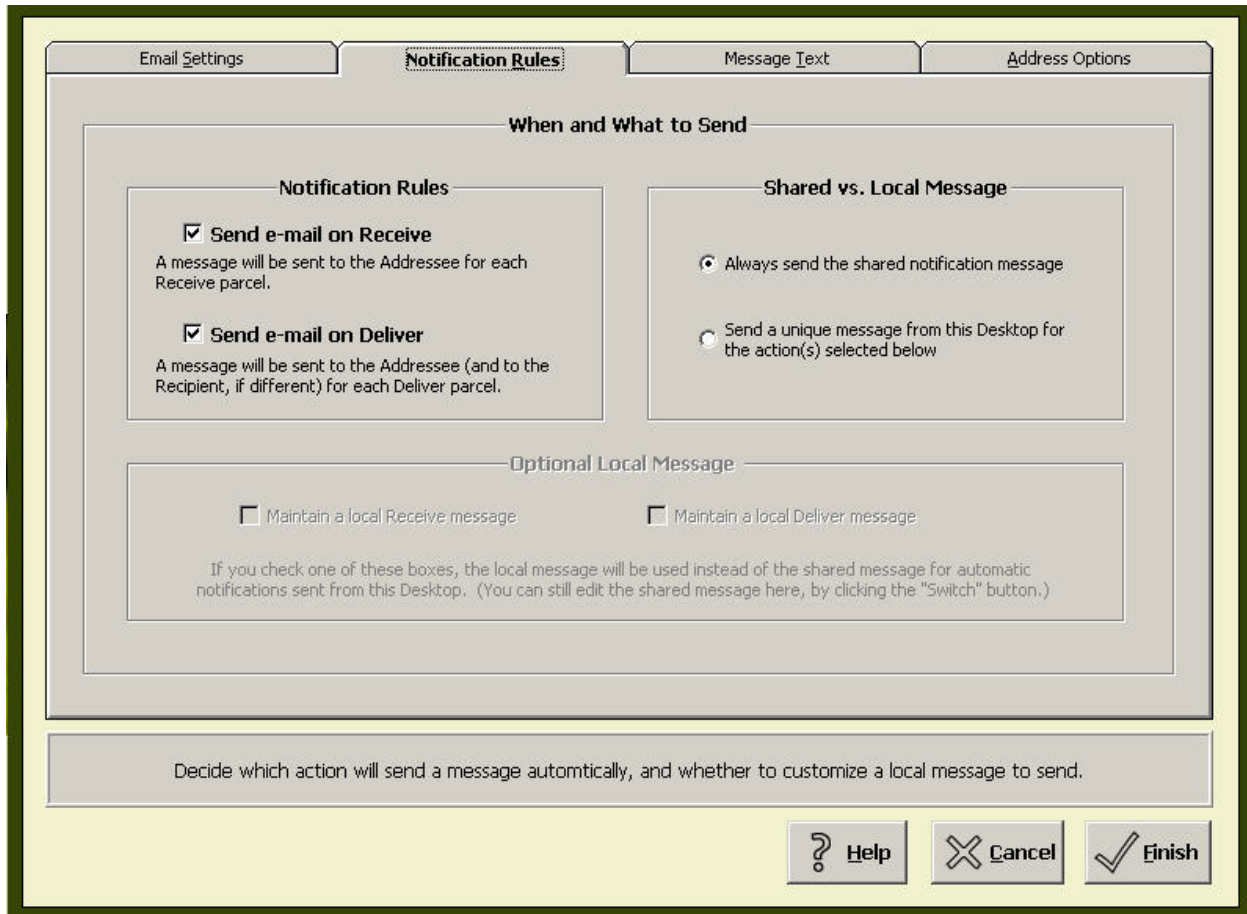


Figure 72 – Notification Rules Menu – Shared Installation

If you click the **Notification Rules** Tab before turning on Email Notification, you'll get an error. First turn on Email Notification on the **Email Settings** Tab and then click **Notification Rules** to define the options. Your choices are:

- Send email on Inbound - Select this checkbox to send an automatic email when you inbound a parcel.
- Send email on Delivery - Select this checkbox to send an automatic email when you deliver a parcel.



- Shared vs. Local Message - Each desktop can be configured to send either the Shared Message or a Local Message. A shared message is pervasive system-wide. A local message comes individually from a specific desktop.
- Optional Local Message – This setting means Trackpad will send a local message if there is one—otherwise it defaults to the shared message.

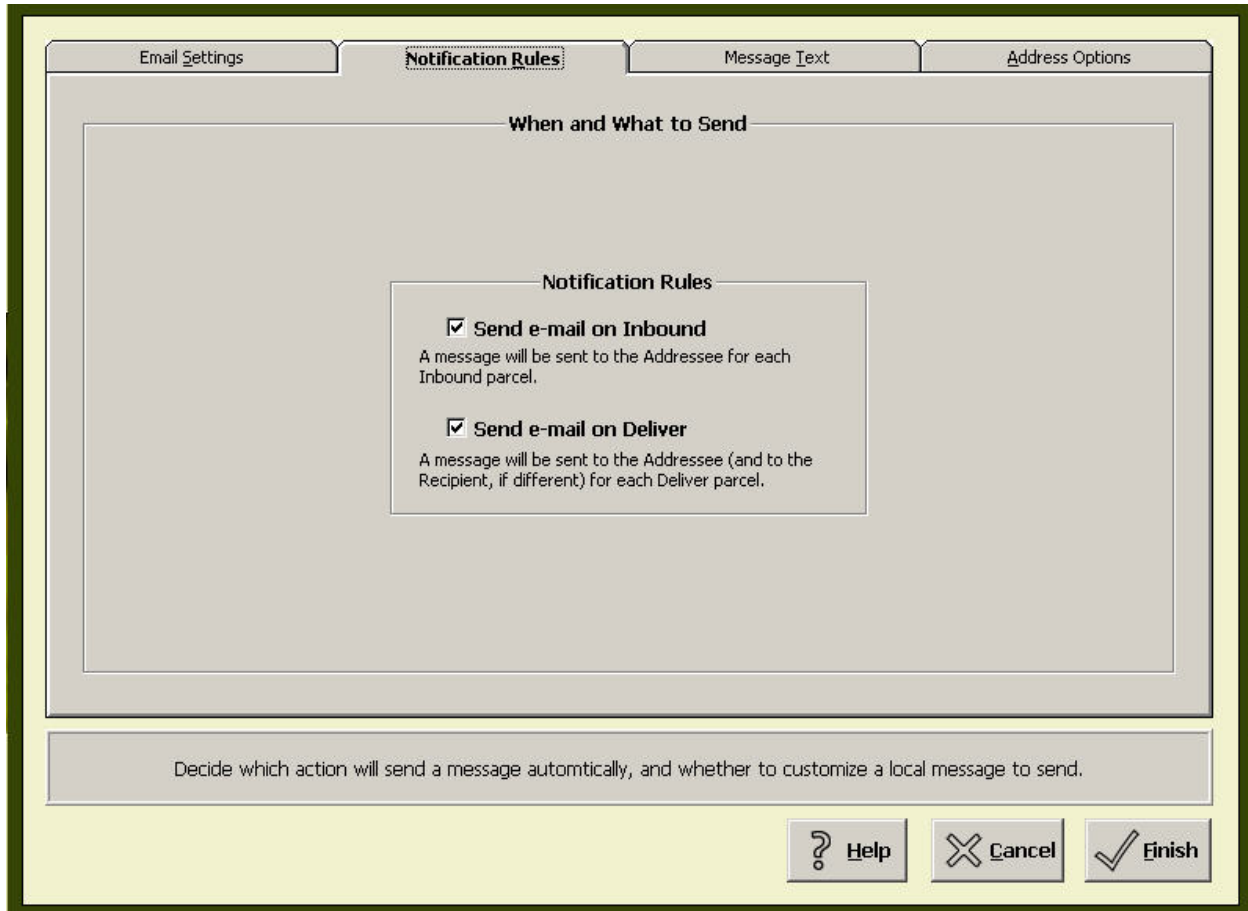


Figure 73 - Notification Rules Screen -r Standalone Installation

MESSAGE TEXT

You define what the email messages Look like on the Message Text screen, the third tab in the Email Notification menu. Follow this procedure for composing emails.



Figure 74 - Message Composition Menu

Choose which message to edit, either the inbound or delivery message.

1. Configure the blank message as desired. Change the Subject Line and text as desired.
2. Compose the body of the message to suit your needs. Use the field's options on the right to add automatic data into the body of your email message. This is very much like composing a form letter. You have the following form field:
 - a. Tracking Number
 - b. Receive Date
 - c. Receive Time
 - d. Receive Location
3. In addition, you also have the option of merging field information from any custom fields you have set up. The buttons 1st, 2nd, 3rd, and 4th correspond directly to the



tabs under **Custom Options/Custom Fields**. Remember how custom fields were set up in tabs? These buttons refer to the collections of custom fields and allow you to access them. (Refer to the section on **Custom Options** if this does not make sense.) In the figure above, custom fields such as Profit Center which exist in the fourth tab of Custom Fields are visible. Your custom fields will vary.

4. When you insert a custom field, Trackpad allows you to choose how the information will be represented—its formatting. Each insertable piece of automatic text can be formatted in one of the following ways.

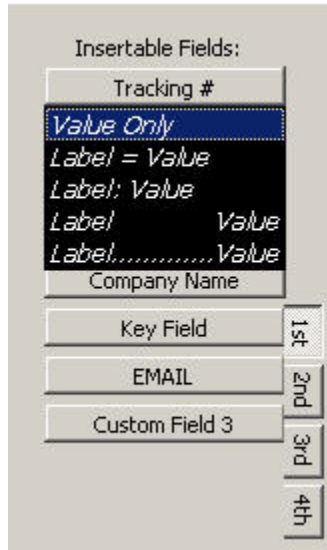


Figure 75 - Options for Inserting Fields

Value Only - Inserts the value of the field. Example: 123456

Label = Value. This inserts the label and the value, separated by an equal sign. Example: Tracking Number = 123456

Label: Value – This Inserts the label and the value, separated by a colon. Example: Tracking Number: 123456

Fixed Width – This inserts the label followed by a number of spaces, followed by the value. The length of the label, spaces and value is 42 characters. Example: Tracking Number 123456

Dot Leader – This inserts the label followed by dot leaders, followed by the value. The length of the label, dots and value is 42. Example: Tracking Number.....123456



PREVIEW MESSAGE

Click to Preview Message to see how the message will Look as an actual email. Sample data is used for all inserted database fields.

UNDO

This button rolls back your changes to the previous email message.

DEFAULT

This button restores the default email message. You will lose anything you've entered to customize the email message.

ADDRESS OPTIONS

The **Address Options** screen has additional options regarding who receives automatic email notification and how the system should deal with bad addresses.

COURTESY COPY

This option is available only if you checked **Send Email on Deliver** on the **Notification Rules** screen. This option will cause UPS Trackpad to send an email to the original addressee when a parcel is signed for by someone else.

CHECK EMAIL ADDRESSES

**Send without Checking**

This default setting sends the email using the addresses stored in the Trackpad inbound company directory.

Check the Mail Systems

Before sending the email, this setting instructs Trackpad to check the address book in your email address book for an exact match, ensuring address accuracy. This setting can be tricky, because Trackpad checks with the address book for an exact match of the Custom 1 value assigned to the parcel record, and if found, addresses the email notification with the address that corresponds to that match. So, if your email directory is set up for a user John Low and Trackpad has him recorded as Low J., then there will be no email sent.

CORRECT BAD ADDRESSES

This option is only available if the previous option is checked.

Discard the Message if Address

This option will not send the email if a match does not exist.

Show the Address Book

This option will allow the user to select the correct address from the local address book (this will be the address book maintained by your email application).

After configuring your **Email Notification** options, save your changes and return to the **Setup Menu** by clicking the **Finish** Button.



Unique Numbers

From the **Setup Menu**, click the **Unique Numbers** button to view options for the number sequence generator that creates unique internal tracking numbers from the Trackpad desktop. You can define a shared sequence, meaning that all the internally generated tracking numbers will have the same prefix and/or suffix, or enable local sequences to differentiate tracking workstations quickly when searching.

For example, you might decide that all internally tracked parcels that don't have their own barcodes will be prefixed ABC. Then you could further define a local sequence for each desktop, something like ABC1, ABC2, ABC3, ABC4. The generation of unique numbers and local sequences is another way Trackpad customizes itself to your particular needs.

The number generated by your sequence settings is used every time Trackpad needs to create a unique number for a parcel that does not have its own barcode. For example, when inbound items from the desktop, you can hit the "Auto" button and Trackpad's unique number generator will create a number you can use to track the parcel internally, or even print out a barcode label using your barcode label printer.



Reference

ABC212mail Auto

Shipping Carrier Service Name Vendor

Key Field

Custom Field 6

Options

parcel Label

(Print label)

Send e-mail

Custom Field 3

Figure 76 - Hit Auto On Inbound to Invoke Unique Numbers

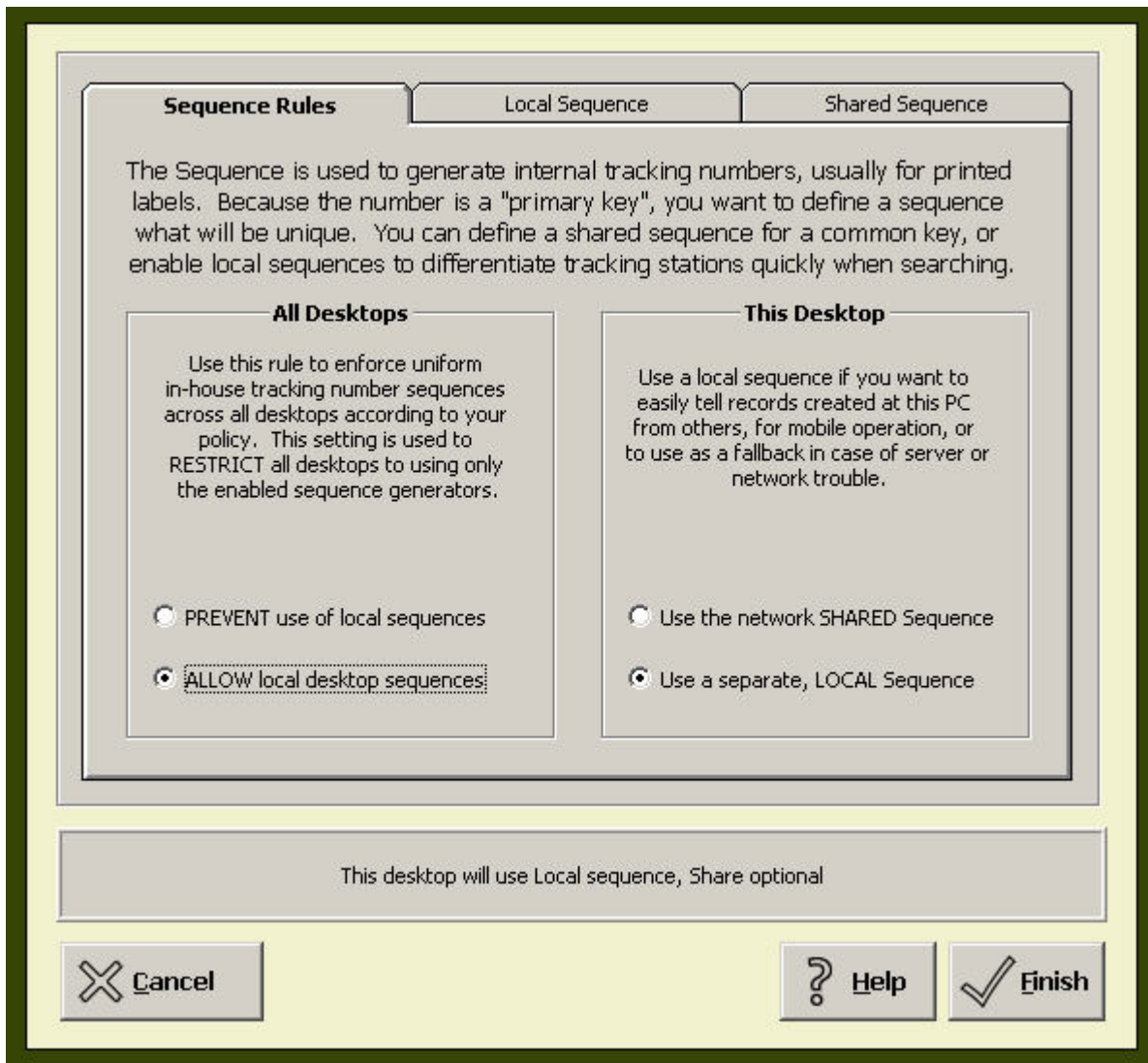


Figure 77 - Sequence Rules

SEQUENCE RULES

The sequence rules options are all presented in a radio button format to make it easy for you to administer sequences. You have to keep in mind two alternatives:

1. Sequences that apply to the entire Trackpad system, and
2. Sequences you wish to handle from an individual desktop.

ALL DESKTOPS

PREVENT use of local

- Use this option to enforce uniform in-house tracking sequences across all desktops.

ALLOW local desktop

- Use this option to allow you to use either Shared or Local sequences.



THIS DESKTOP

Use the network shared sequence

- This desktop will use the shared sequence.

Use a separate local sequence

- This desktop will use a customized local sequence.

LOCAL SEQUENCE

A local sequence can be used to differentiate different desktops, which can be helpful when searching for a particular parcel. You can specify a prefix, a suffix, or both. You can also specify the range of numbers within which the sequence will occur. Click **Finish** for your settings to take effect.

Sequence Rules **Local Sequence** Shared Sequence

Local Sequence Setup

Set up the optional System-Wide Label format here. If you choose to enforce the use of this label format on all desktops, local label settings on all desktops will be ignored.

Label Prefix: **Label Suffix:**

Unique Number Range: Enter the minimum and maximum value for the numeric part of the label. When the sequence reaches the Upper Limit, it will restart with the Lower Limit value.

Lower Limit:

Upper Limit:

The new Reference would be: ABC207mail

The next Reference is: ABC208mail

This sequence format is retrieved from C:\Program Files\UPS\TCS\ Bound, Configured, Available



Figure 78 - Local Sequence Menu

SHARED SEQUENCE

Shared Sequence options overwrite local sequences. To set a mandatory shared sequence in the Trackpad Central System, use a shared sequence. Located in the third tab of the Unique Numbers menu, the shared sequence menu gives you the option of specifying a prefix, a suffix, or both. You can also specify the range of numbers within which the sequence will occur. Click **Finish** for your settings to take effect.

Figure 79 - Shared Sequence Menu

SQL SEQUENCE

The SQL sequence generator is only enabled for SQL installations of Trackpad. When you are running Trackpad on an SQL database, you'll find a fourth tab, SQL Sequence, under the



Unique Numbers button. It functions like the number generators for other installations flavors, allowing you to specify a prefix, a suffix, and a range of numbers.

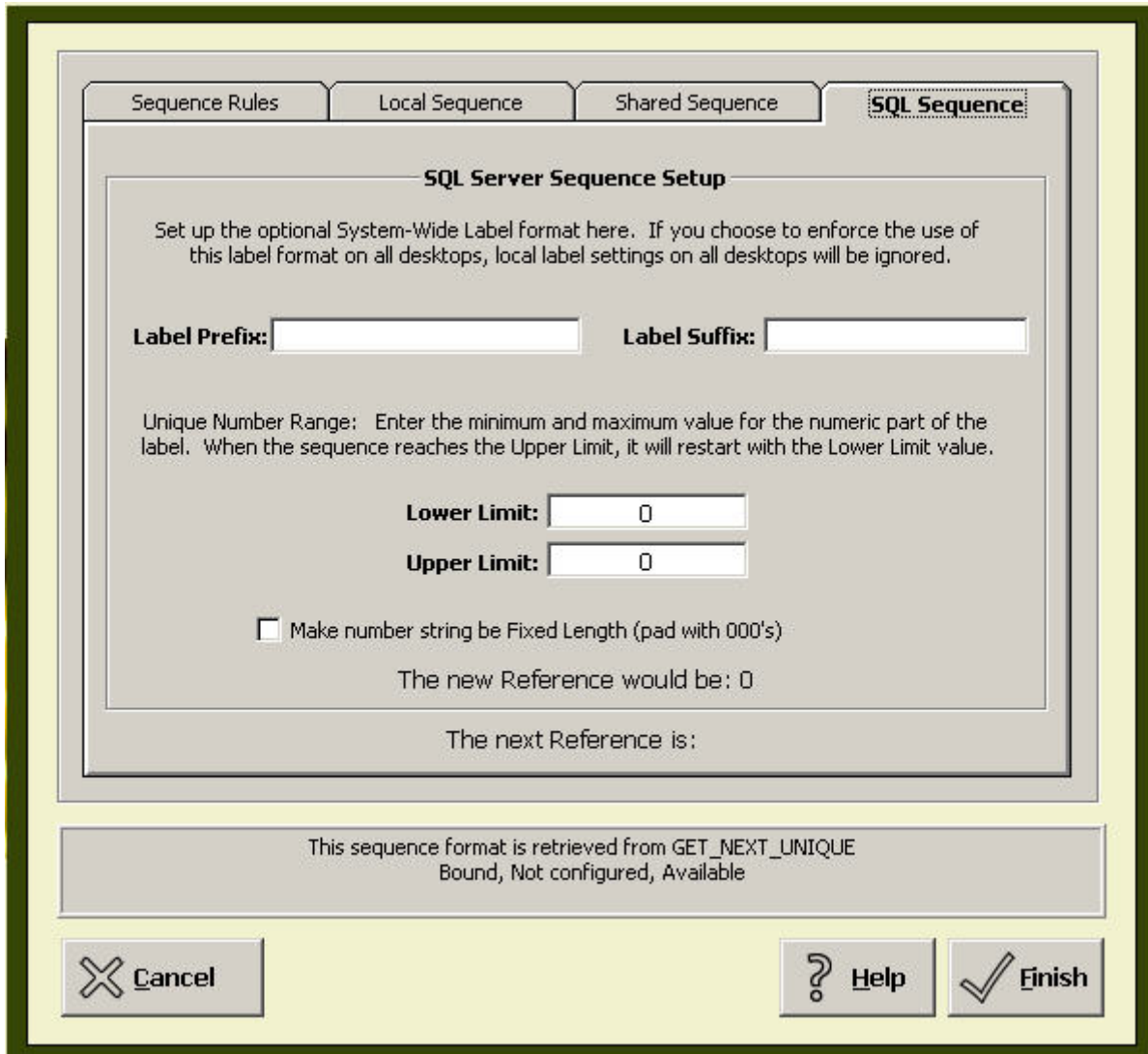


Figure 80 - Unique Number Sequence, SQL Installation

Once you have configured the Unique Numbers options, save your changes and return to the **Setup Menu** by clicking **Finish**.



Device Setup/Options

From the **Setup Menu**, click on the **Device Setup/Options** Button to view hardware options. These settings are stored locally and only affect the local desktop. This menu allows you to set up:

- UPS Trackpad's transfer connection for the HPCs
- Signature Pad signing device to collect signatures at the desktop
- Delivery Link import
- Label and report printers

INFRARED DEVICE CONNECTION

Click **enabled** to enable infrared communication between your HPC and the Trackpad's Central System.

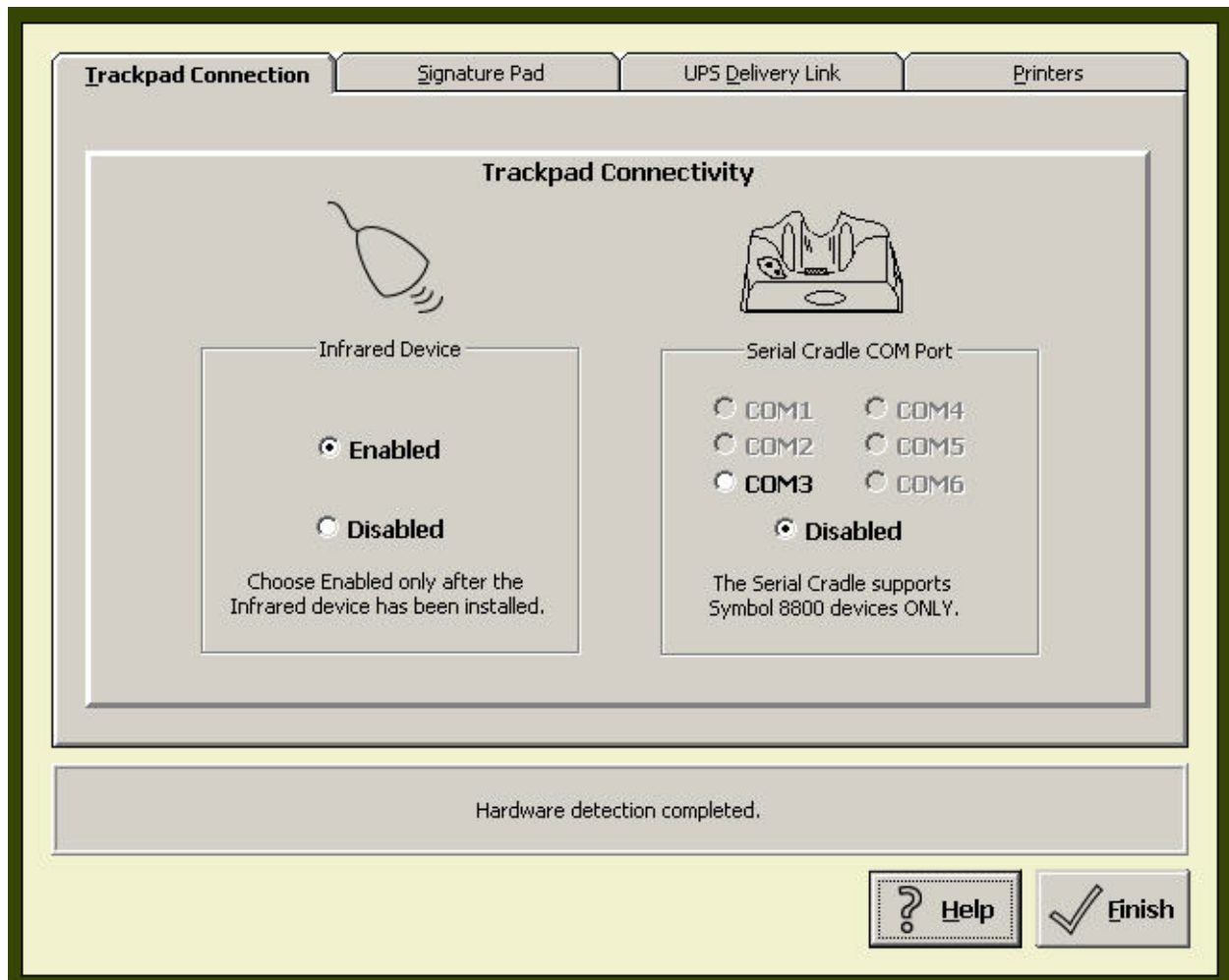


Figure 81 - Infrared Device Set Up Menu

SERIAL CRADLE COM PORT

If you are using Symbol 8800 series HPCs, you may also want to enable a serial connection instead of your IR connection. Only Symbol 8800s support serial data transfer, so if you are using another HPC, make sure this connection setting is disabled. For those who are using Symbol 8800 series HPCs, enable serial data transfer by simply clicking the radio button that corresponds to the serial communication port (COM) that connects to the HPC.

SIGNATURE PAD

Signature pads are part of the HPC. To capture a signature when delivering parcels on the desktop, a separate signature capture method must be used—the desktop signature pad.

Once the device is installed, setting it up for UPS Trackpad is a simple procedure. The signature pad menu allows you to either disable the signature pad, or to enable it by selecting the port it is connected to from the “Physical Pad Connection” area.

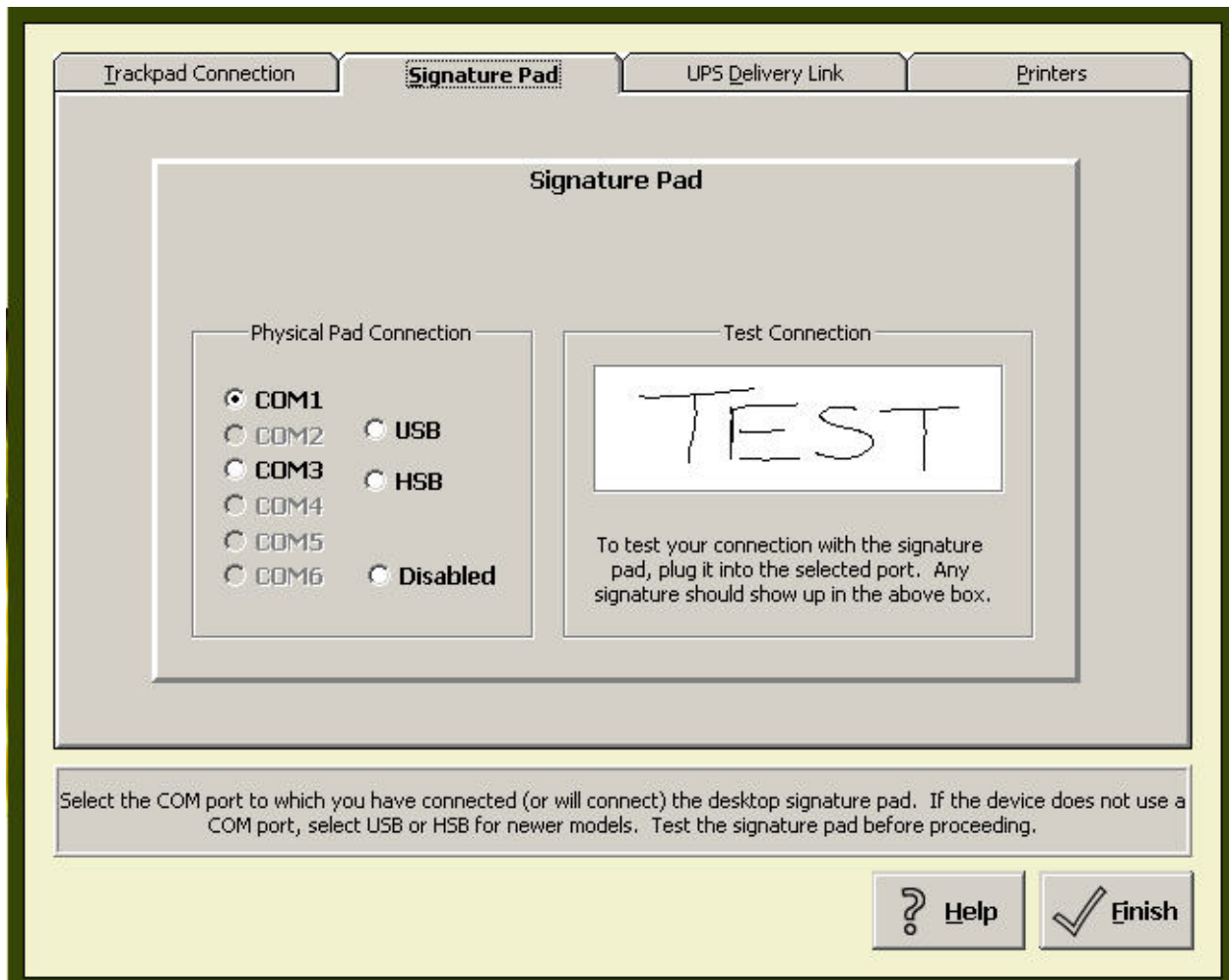


Figure 82 - Signature Pad Set Up Menu

The **test connection** window allows you to see if you are in communication with your signature pad. Your signature should appear in this window.

Once you've set up the signature pad properly, you will be able to deliver parcels and take signatures from any desktop running Trackpad without having to use an HPC.

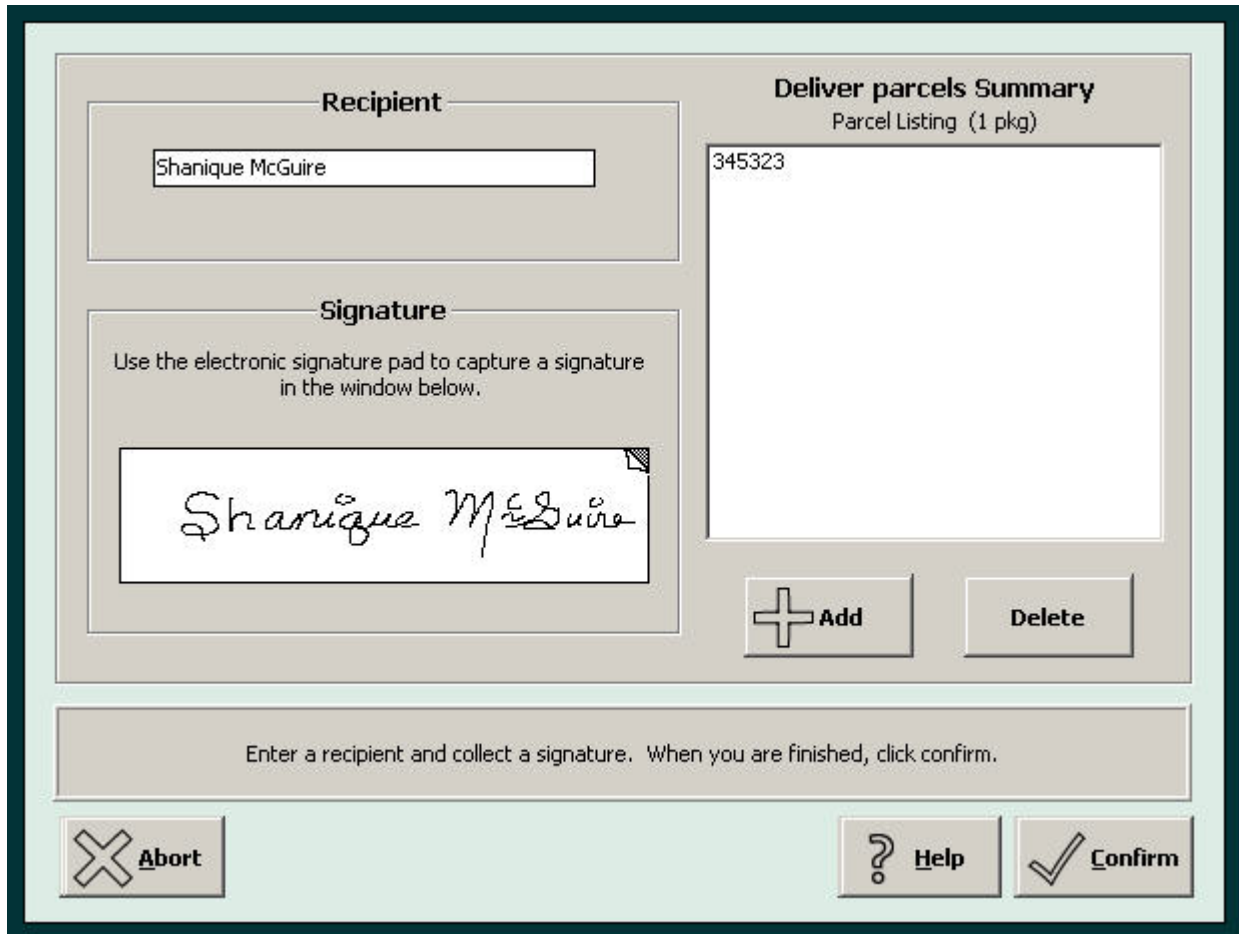


Figure 83 - Using Signature Pad to Delivery from Desktop

DELIVERY LINK

Delivery Link is a UPS software program that allows you to immediately access UPS package information at the time of delivery. The UPS driver beams package data through an infrared connection to Delivery Link. Delivery Link stores the file in a specified folder location. (If you are not running Delivery Link and would like to, contact your UPS representative.)

UPS Trackpad imports Delivery Link package files. Once its link is established, Trackpad can inbound packages directly from this file. This saves time over inbound using the HPC.

In order to configure UPS Trackpad to import data from Delivery Link, follow this procedure.

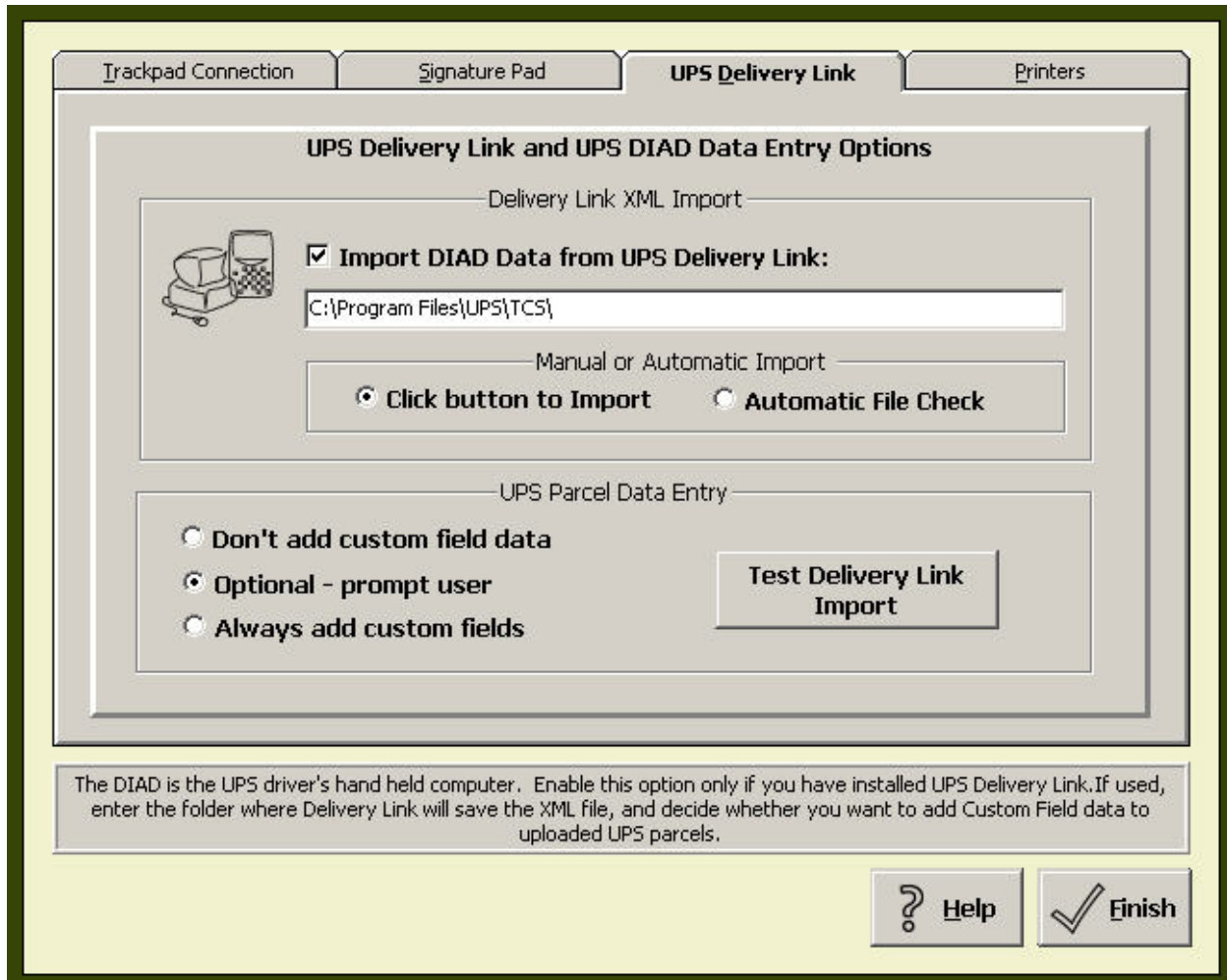


Figure 84 - Delivery Link Set Up Menu

1. Locate the path to the location where UPS Delivery Link stores its package log.
2. In Trackpad set up mode, open the UPS Delivery Link file tab on the Device Setup/Options menu. Check Import DIAD from UPS Delivery Link.
3. Choose if you would like to control when UPS Trackpad imports packages from Delivery Link, or if you would like Trackpad to check the file for you and make sure it always uses the most current one. **Click Button to Import** is the setting you want if you wish to manually control the import process. (The button you will use to import is on the user screen, called **UPS Delivery Link Import**.) **Automatic file check** means Trackpad will continue testing its link to Delivery Link's file at regular intervals. When a new file is posted, Trackpad will automatically import it. If you choose this setting, you may wish to disable custom field prompts so Trackpad can flow seamlessly.
4. Decide how to handle custom fields. You can ignore them, be prompted regarding them, or always be forced to fill them out.



- a. Choose **Don't Add Custom Field Data** to have Trackpad import the data only; there will be no opportunity to add additional data to the records.
 - b. If you choose **Optional – prompt user** the user will be prompted yes or no to enter custom data to the records
 - c. If you mandate **Always add custom fields** the inbound form will display options for additional data entry. This does not ensure data entry for the records will occur. Validation rules are configured in the set up screens, under **Custom Options -> Custom Fields**, and under **Barcode Filter**.
5. Click the **Test Delivery Link Import** button to confirm your settings are working. This button invokes the Delivery link file import process. Trackpad will scan the folder specified for files. If there are none, it will simply wait for one to appear. As soon as a file appears, the import process will begin.

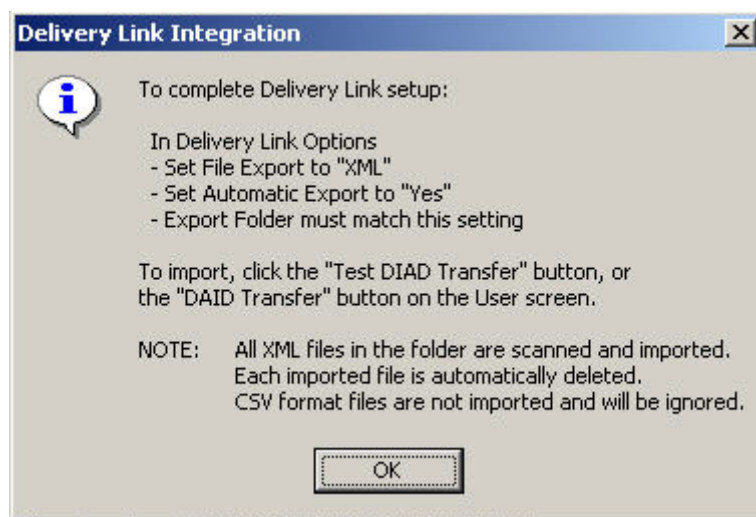


Figure 85 – UPS Trackpad's Delivery Link Setup Note

CONFIGURING DELIVERY LINK TO EXPORT DATA

1. Start Delivery Link on the desktop.
2. Click on Tools > Preferences.
3. Select XML file (*.xml) for your export file type.
4. Set the default Export Directory to the same path set in UPS Trackpad (E:\Program Files\UPS\ TCS in this example).
5. Auto Export: Check the box next to **When delivery data is received**. Click **OK**.

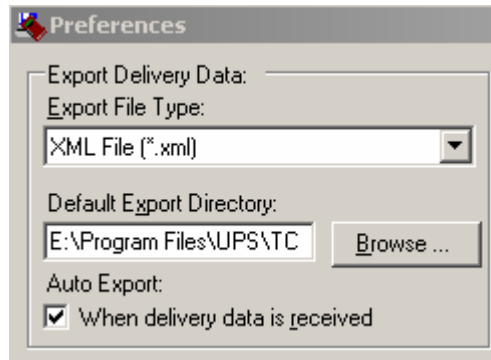


Figure 86 - Preferences Menu in Delivery Link

For further information on using Delivery Link, please see your UPS Delivery Link installation instructions and user guide.

PRINTERS

In order to print reports and labels from within UPS Trackpad, your specific printers must be set up on this screen. Different printers must be used for printing reports and printing labels due to the differences in format. Only the Zebra LP 2844 label printers is supported for barcode label printing in Trackpad.

SETTING UP THE REPORT PRINTER

The report printer is used to print reports from the user's **Parcel Reports** menu. Any printer available from your desktop will be available in Trackpad. Use the drop down menu to select the printer you wish to print reports to. If you do not want to print reports, choose **Disable**.

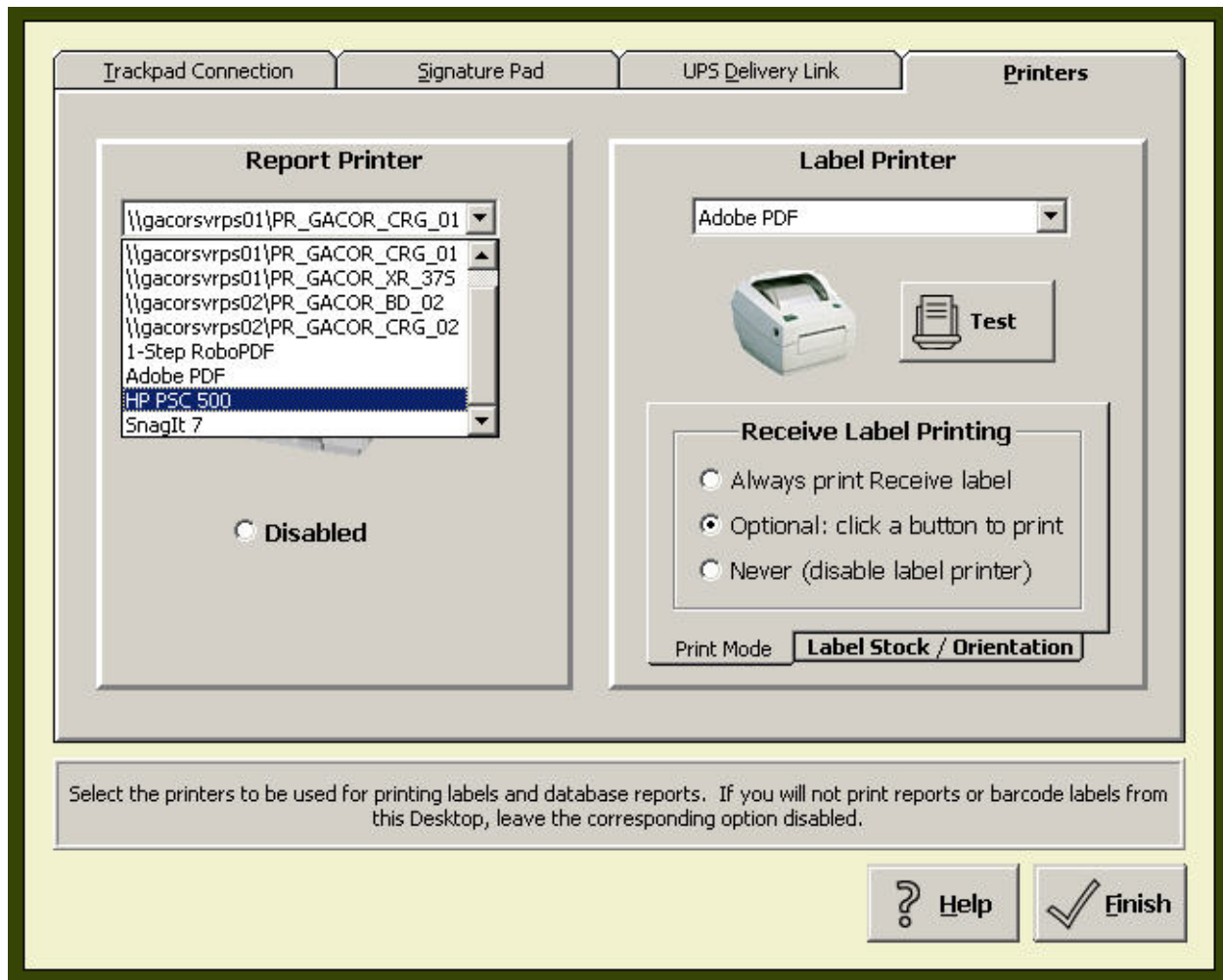


Figure 87 - Use Drop-down Menu to Choose Report Printer

SETTING UP THE LABEL PRINTER

The label report function can only work with specialized label printers. Currently, label printing will not work with printers other than [Zebra LP 2844](#). Refer the hardware installation chapter and make sure your label printer is installed correctly. Then, simply choose it from the drop-down menu under **Label Printer** within the **Printers** tab on the **Device Set Up/Options** menu of setup mode.

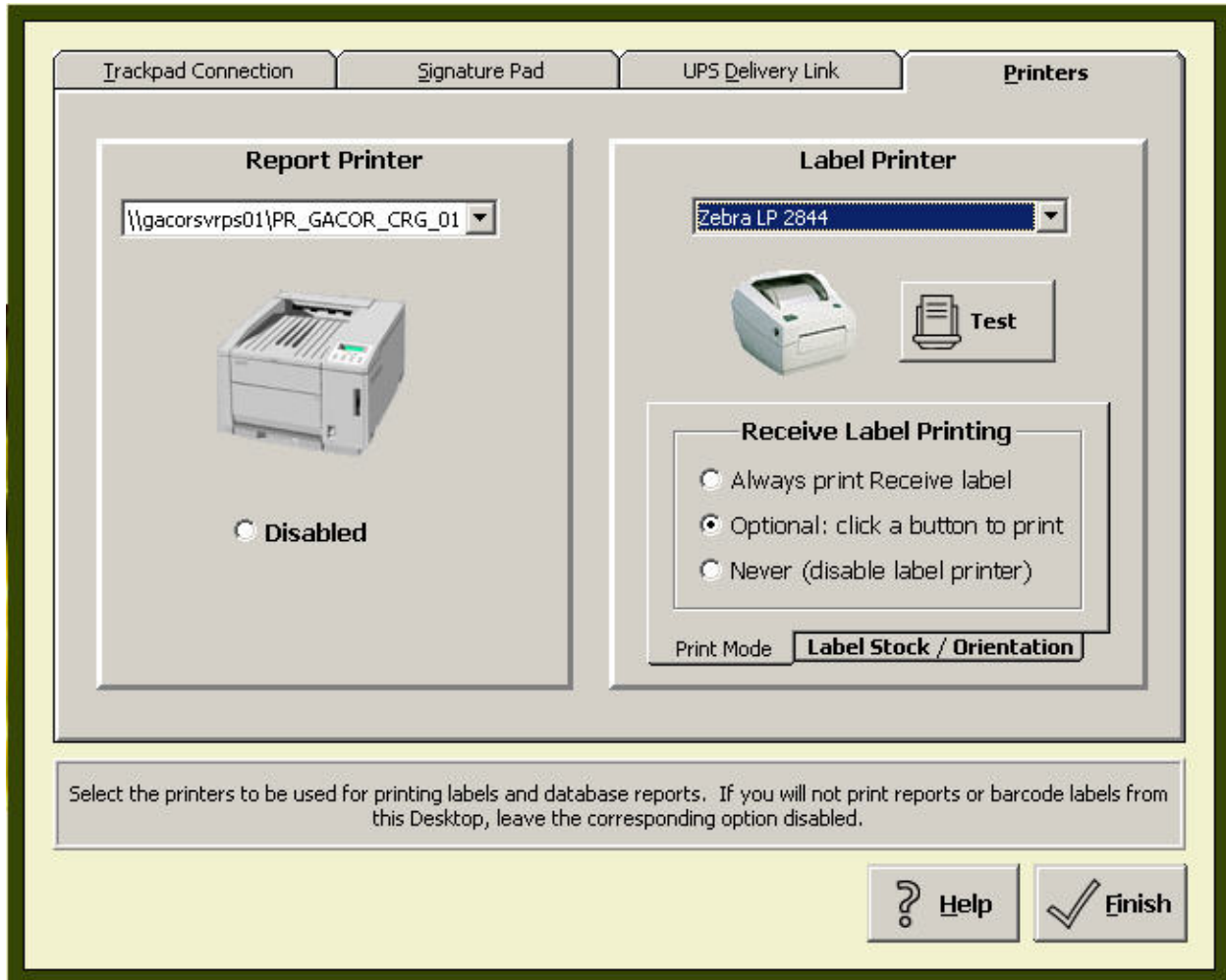


Figure 88 - Setting Up Label Printer

You have three choices regarding handling label printing:

1. **Always print Receive label.** This feature is handy if you never track pre-barcode packages or wish to standardize on your own system. Some UPS Trackpad users optimize the software to track assets or other non-package goods. If that is your situation, always printing a label when performing an inbound function is a useful setting.
2. **Optional** – click a button to print. This allows you to have the option of printing an inbound barcode label.
3. **Never.** This choice disables your label printer. Choose this if you do not have an Eltron or other UPS Trackpad compatible printer.



LABEL PRINTING OPTIONS

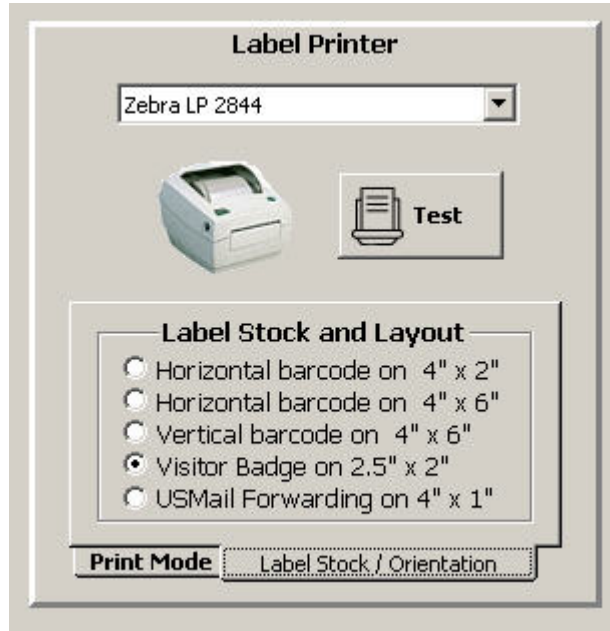


Figure 89 - Label Stock Options

There is a small tab underneath the Label Printer menu that allows you to access options for your label stock. You may choose:

- **Horizontal barcode** on 4 inch x 2 inch labels
- **Horizontal barcode** on 4 inch x 6 inch labels
- **Vertical barcode** on 4 inch x 6 inch labels
- **Visitor badge** on 2.5 inch x 2 inch labels
- **US Mail Forwarding** label on 4 inch x 1 inch labels

Set the label stock option that you intend to carry in that label printer as a default. If you print different formats frequently, you might consider more than one label printer. Although Trackpad can only link to one label printer at a time, having two choices already loaded with popular label formats makes it faster to switch from the desktop from one stock (perhaps a barcode package label) to another (like a US Mail forwarding label).



Handheld Device (HPC) Configuration

This section, new in UPS Trackpad 4.0, controls the communication between the desktop and a Handheld Personal Computer (HPC). You set which features of the transfer process are used and when they are used. To modify the behavior of the HPC, in Trackpad's set up mode, click on the **Trackpad Handheld Set Up** button.

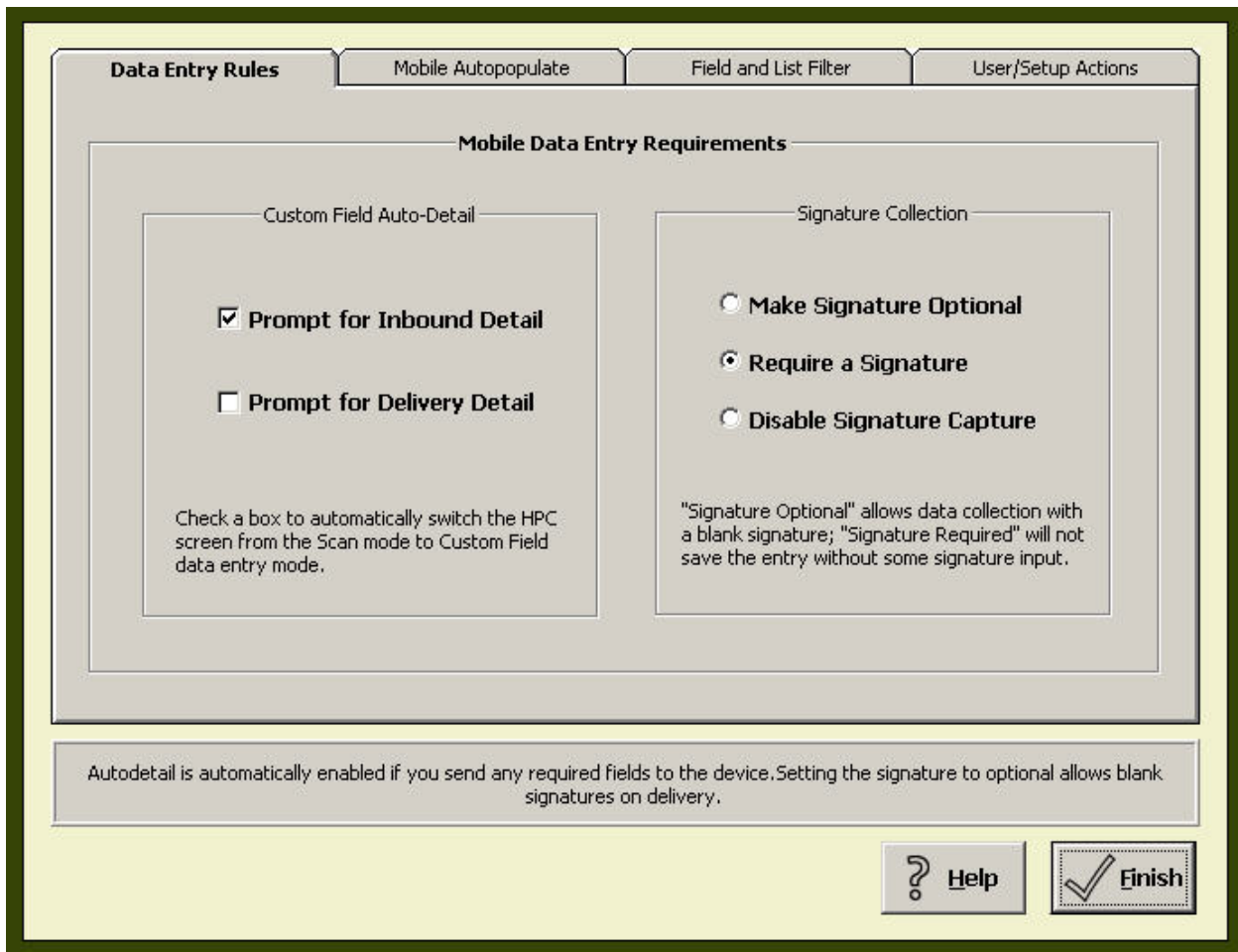


Figure 90 - Handheld Setup Main Screen



DATA ENTRY RULES

The Data Entry Rules tab applies to how data is entered on handheld devices.

Custom Field Auto Detail

In the **Custom Field Auto Detail** section of the menu, you can choose whether or not to prompt the user to enter detail during inbounding or during delivering. If you do not check these boxes, the HPC will simply scan items and display the list of items scanned. To edit or add information to an item, the user will have to double-tap the item in the list they wish to edit.

- Delivery Default Fields
- Tracking Number
- Recipient Signature

Trackpad also automatically records time and date information for both inbounding and delivering procedures.

When you enable Custom Auto Fields by checking the boxes **Prompt for Inbound Detail** and **Prompt for Delivery Detail**, you prompt the user to enter additional information for custom and carrier filter fields you have set up. Later, in the **Field and List Filter** tab, you have the option of excluding some custom fields from the handheld device. In the **Signature Collection** portion of the menu, you can choose to require a signature (the default) for every delivery event (meaning one signature can cover a list of packages). You can also make a signature optional—meaning the user will be prompted to collect one, but if one is not collected, the transaction is still allowed. The **Disable Signature Collection** setting is for operations where you prefer not to collect any signatures.



MOBILE AUTO POPULATE

Data Entry Rules	Mobile Autopopulate	Field and List Filter	User/Setup Actions
<p>Inbound Autopopulate</p> <p>During Desktop Receive data entry, fields that are set to "parcel" mode can be automatically filled in from a record in the Directory.</p> <p>Manual Entry</p> <p><input type="radio"/> Autopopulate OFF: Manually enter data into each custom field. Do not synchronize the [Inbound] directory.</p> <p>Directory Lookup</p> <p><input checked="" type="radio"/> Receive Autopopulate ON: The entry in Key Field will automatically retrieve details from the directory.</p>		<p>Deliver Autopopulate</p> <p>During Desktop Deliver data entry, fields that are set to "parcel" mode can be automatically filled in from a record in the Directory.</p> <p>Manual Entry</p> <p><input type="radio"/> Autopopulate OFF: Manually enter data into each custom field. Do not synchronize the [Deliver] directory.</p> <p>Directory Lookup</p> <p><input checked="" type="radio"/> Deliver Autopopulate ON: The entry in Key Field will automatically retrieve details from the directory.</p>	
<p>Auto-populate is a Custom setting. Use the Custom form to enable the Autopopulate feature. This option lets you turn OFF autopopulate on the mobile device. This requires that user enter a value for each field on the device.</p>			
		<input type="button" value="Help"/>	<input type="button" value="Finish"/>

Figure 91 - Mobile Auto-Populate Menu

The **Mobile Autopopulate** menu has two sections, one for inbound autopopulation, and the other for delivery autopopulation.

Autopopulate is a fancy term for a simple function. It means that the handheld device will automatically fill in some fields for you, based on one simple selection. The one simple selection is the key field. So if, for example, your "key field" is "name," then when you select a specific name from the delivery company directory, other custom fields associated with that name (for example, profit center, supervisor, floor, department, or any other field you may have set up) will be automatically entered for you. Obviously this speeds parcel transactions because the user does not have to scroll through lists or use the keypad to enter custom information.

A key is by definition a field you use to sort data. It can also be called a *key field*, *sort key*, *index*, or *key word*. For example, if you sort records by age, then the age field is a key. You can choose any key you want to sort your information, just make sure it's unique.

- For your inbound information, autopopulation references your inbound company directory, and uses field one of the custom fields for its key.



- For delivery information, autopopulation uses your delivery company directory, where field number eleven of the custom fields is your key.

Autopopulation & Custom Fields

In order to use autopopulation, you have to set up your custom fields correctly and have imported inbound and delivery company directories. (See the section on Custom Fields and Directory & Lists).

If you do use name, which is a popular choice, you'll have to consider ways to distinguish among people who have the same name. The key field has to be unique. That means you can't have a Larry Jones and another Larry Jones. (You could do Larry Jones 1 or L. Jones or some variant.)

When you create your company directory files, make sure the first column of data contains the information you wish to use as your key.

Autopopulation Settings

Inbound and Delivery both have the same options. For either, you may **choose Manual Entry**, which allows the user to use the keypad, or select from a **drop down list**, or use **Directory Lookup**, which means that based on one entry, the rest of the custom fields will be pre-populated from the directory as much as possible. Obviously you may have some custom fields that are not in the directory, but for all fields that are in the directory, checking **Directory Look-up** means those values will be entered for the user.



FIELD & LIST FILTER

The field and list filter menu, located under the Trackpad Handheld Setup button in set up mode, allows you to customize which custom fields are used on the handhelds. You might choose to tailor these options if you find the inbounding or delivery processes are being bogged down by too many features, and yet you do not want to delete custom fields completely.

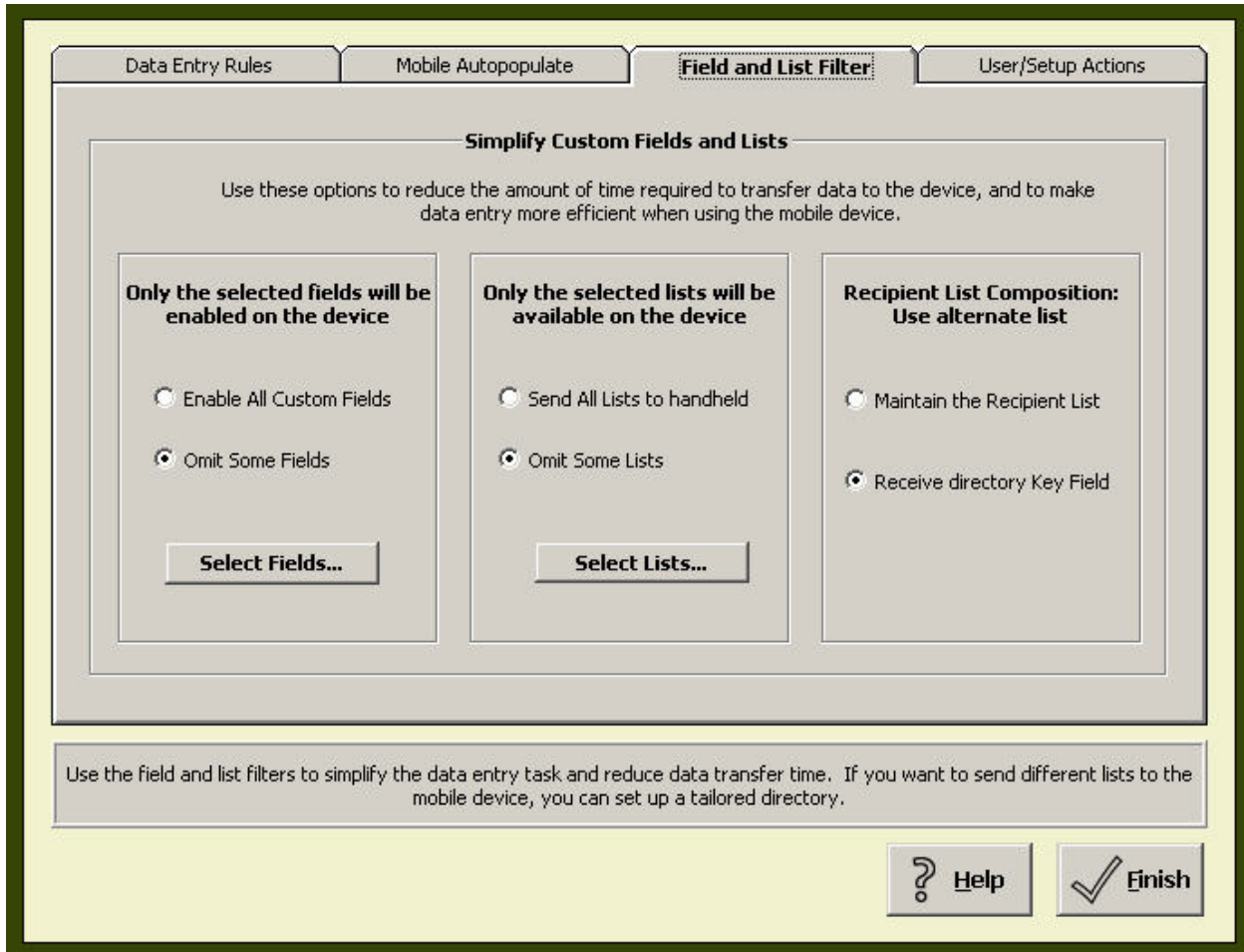


Figure 92 - Field & List Filter Menu

This menu gives you three opportunities to customize—one for fields, one for lists, and one for the unique recipient list.

Selected Fields

This area allows you to either enable all custom fields for entry on the HPC, or to omit some fields.



Figure 93 - Omitting Custom Fields from the HPC

Unlike some areas of Trackpad, which have separate options for inbound-oriented fields and delivery-oriented fields, this menu lumps all the fields you have enabled (in **Custom Options**) on the right, and allows you to move them to the left if you wish to omit them. Click OK to save your preferences. They will take effect on each handheld the next time the individual HPC syncs with Trackpad's central system. This is a global setting and will apply to all handhelds on the system.

Selected Lists

Selected Lists works in a similar way. All of the lists you enabled in Custom Options are available to the handhelds. Through this menu, you can choose not to enable certain lists for the handheld by simply moving them to the left. Click **OK** to finalize your selection.

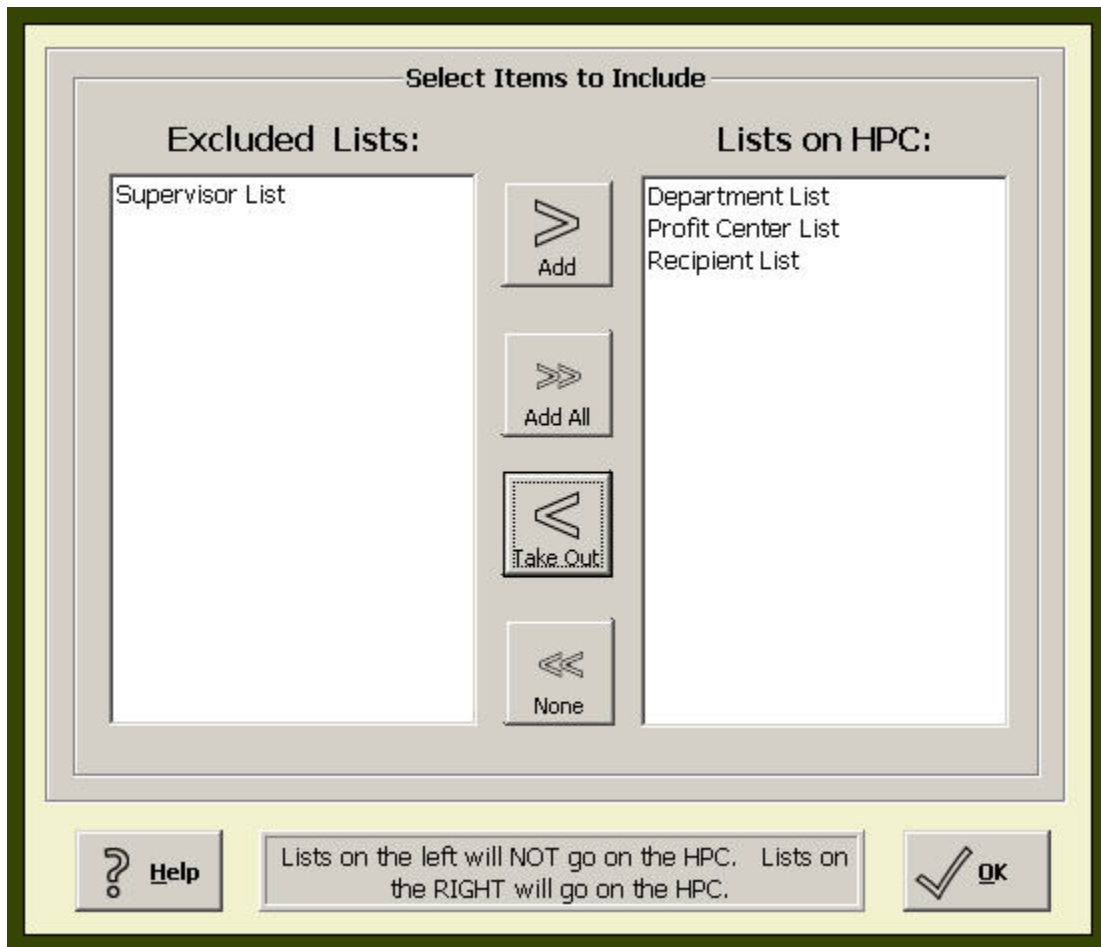


Figure 94 - Selecting Lists for HPCs

Recipient List Composition

This setting simply tells Trackpad where to find your recipients. Depending on how you prefer to work with Trackpad, there are two options:

1. **Maintain Recipient List.** This means that in Directory & Lists, under the **Lists** tab, you have chosen to import a .csv file that is a list of your recipients. Trackpad will provide this list to the HPCs. This setting is appropriate if you maintain a different inbound list than the Custom 1 field.
2. **Receive Directory Key Field.** This setting means that you have created a company delivery directory, and that your first column of data is composed of your recipient names. If you are using a company directory and can configure the file so that names are your first column of data, this is the choice you want to enable. If this is a very long list of names, a significant performance boost can be obtained by using one list for both fields (i.e., recipient and custom 1).



USER/SETUP OPTIONS

The **User/Setup Options** menu, the fourth tab under the **Trackpad Handheld Setup** button, allows you to configure the different transfer privileges for end users and Trackpad administrators.

- Users are people who run Trackpad from the user menus.
- Administrators are people who run Trackpad from the administrative setup menu.

If you are running Trackpad in user mode and initiate a transfer, you will be able to effect certain settings as configured by this menu.

Similarly, if you are running Trackpad in set up mode and initiate a transfer, this menu allows you to define a different range of privileges.

The left column defines privileges for users, and the right column defines access for administrators.

The areas you can differentiate user versus administrator privileges for are:

- handheld device registration,
- custom field options, and
- list replacement options.

Your choices for these functions are one of the following:

1. always,
2. prompt user, or
3. never.

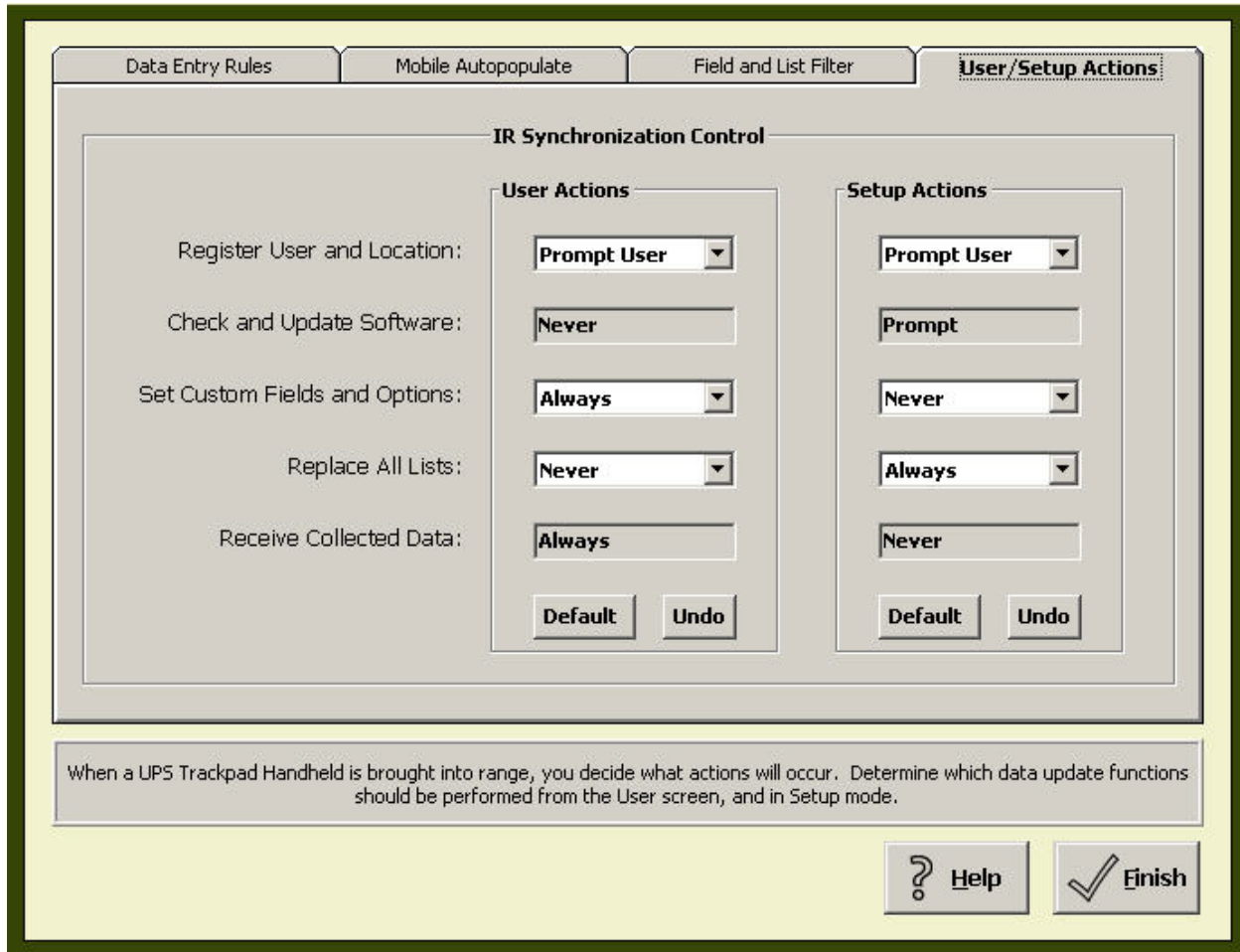


Figure 95 - User/Setup Action Menu

Register User and Location

This menu allows you to define privileges for users separately from administrators.

- The default setting for user actions is Never.
- The default setting for administrative action is Always.

For users, set this to “always” if you want to always re-register the device on transfer, and set it to “never” if you wish to not view the handheld device registration menu. Many organizations find it helpful to forego prompting registration at a user level because it speeds the transfer of data to Trackpad’s central system.

Check and Update Software

This action is functional in Trackpad 4.0 but its settings cannot be changed.



Figure 96 - User "Prompts" For Registration, Configuration, & Updates

Set Custom Fields and Options

This option, which is configurable by user or by administrator, allows the handheld device to update its settings and preferences in accordance with the settings maintained by Trackpad's central system. This operation takes time, so it may not be something you wish to enable for every transfer. The options the device will prompt for are:

- Handheld registration
- Sending configuration information from Trackpad's central system to the HPC
- Updating lists and directories

Replace All Lists

This setting allows you to choose under which circumstances—user or administrator access—you wish to have lists replaced with the newest version. When you enable this setting, Trackpad's central system sends the entire list to the handheld device. This often takes several minutes and significantly slows the individual transfer operation. For this reason, many organizations set this option to "never" for users, and to "always" for administrators. If users are allowed to update lists, it is often a "prompt user" option, and the user is instructed on the proper schedule on which to update lists (for example, on Tuesday mornings).

Receive Collected Data

This field reflects settings that cannot be changed.



Advanced UPS Trackpad Configurations

The following sections are provided to assist IT managers in advanced configurations of UPS Trackpad for the unique needs of their organizations. For assistance or further information on some of these options, contact your UPS PSI representative or UPS Trackpad technical support.

LINKING THE UPS TRACKPAD DIRECTORY TO A LIVE DATA SOURCE

UPS Trackpad can be configured to draw information from a customer's existing databases on a continuous basis. This is called a Linked Database, and is used to synchronize the UPS Trackpad delivery with an existing data source. The following discussion centers around the Trackpad directory which is stored in a file named TCS_LIST.MDB.

USING THE UPS TRACKPAD DIRECTORY LIST DATABASES

Finding the TCS_LIST.mdb file depends on the kind of installation your organization is running and which options you have configured. The TCS_LIST.MDB file may be present on the shared directory, and in the local C:\Program Files\UPS\TCS\ folder. UPS Trackpad Desktop uses the TCS_LIST.MDB on the Shared File system for Email Notification. The Desktop uses the TCS_LIST.MDB in C:\Program Files\UPS\TCS\, if present, for transmission to Handheld Personal Computer (HPC) units. Please see the section on **Using Local Dropdown Lists** for more information. In C:\PROGRAM FILES\UPS\TRACKPAD, there may be an additional TCS_LIST_xxx.MDB file for each HPC, where xxx is the HPC registration number. These are referred to as "Tailored lists." The tailored TCS_LIST_xxx.MDB file is used when that specific HPC is registered.

Within each TCS_LIST.MDB file, there are two sets of information.

- The Company Directory is stored in a table named DIR_LIST.
- The HPC drop-down lists are stored in tables named CUSTOM1 through CUSTOM20 and RECIPIENT. These tables each contain a single column titled "Item."

The "Import Directory" screen in UPS Trackpad Setup is used to populate both the DIR_LIST and the DEL_LIST tables. Once they have both been filled in, the lists included in the directory are automatically generated. Fields that are not set to autopopulate are not included in the directory and their lists must be updated separately.

The procedures in this section provide information on how to replace these two manual operations with automated import through Database Links and Queries.

GENERAL PROCEDURES TO CREATE LINKS

Linking UPS Trackpad to a live data source requires changing the internal structure of the UPS Trackpad Company Directory database file, and adding instructions to extract the desired data. These instructions, in the form of a Microsoft Access Structured Query Language (SQL) statement, are executed every time a UPS Trackpad feature is used that calls for such data.



Areas where data can be linked include the "Look Up Lists" used on the Inbound data entry form and in UPS Trackpad Setup's HPC update, and addresses used for electronic mail notification.

For Inbound data entry, UPS Trackpad HPC configuration, and Email Notification, UPS Trackpad reads tables in the Microsoft Access database file TCS_LIST.MDB. To reduce manual data management tasks, these table objects can be replaced with SQL query objects. This process must be done manually after a standard UPS Trackpad installation has been completed.

For UPS Trackpad to see dynamic data from an external data system, you must add an ODBC Linked Table connected to the online data system to the TCS_LIST.MDB database. Two preliminary requirements must be met to establish a connection:

1. A valid ODBC data source name (DSN) must exist on the PC, and
2. A linked table must be created in the Access database file

Once these requirements are satisfied, two more configuration steps complete the conversion to a linked directory:

3. MS Access tables in the file must be deleted
4. MS Access Queries must be created and saved to replace the tables

The following instructions serve as a general guide. During the process you will probably have to take actions specific to your environment, such as logging in to a valid account on a database server. These instructions apply to Microsoft Access97. The same approach could be taken in Microsoft Access 2000 or 2002, but the steps could vary.

CREATING LINKED TABLES

STEP 1. CREATE AND/OR VERIFY THE ODBC DATA SOURCE(S)

In the Windows Control Panel, open the ODBC32 applet, and click on the System DSN tab. A list of Names and their associated Drivers appears.

The Drivers column shows data source types the PC is set up to access via ODBC. The Names column shows the individual access profiles defined for the data type. These named connections include additional necessary information for the driver, such as database server names and login credentials.

If a named connection already exists to access the information needed for UPS Trackpad, proceed to the end of Step 1, "Testing the data source."

Installing Necessary Drivers

ODBC drivers cannot be installed from the ODBC Control Panel. If a driver for the data source (for example, Oracle or Sybase) does not show on the "Drivers" tab, exit the ODBC Control Panel. The vendor's ODBC driver installation program will provide prompts for setting default values or upgrading existing data sources.

Setting up a new Data Source Name

The UPS Trackpad data source should be a "System" not a "User" DSN. It is suggested that a dedicated DSN be created specifically for the UPS Trackpad



linked table(s). That way, changes made to the DSN for other applications won't disrupt UPS Trackpad operation.

To create a new DSN, Open the Windows Control Panel, and double click the ODBC32 Icon to open the ODBC Control Panel.

Using the ODBC Control Panel to set up a System DSN

1. Click "Add..." while viewing the System DSN list.
2. Select the driver used to connect to the data source, such as "SQL Server."
3. Click "Finish" or "OK."
4. The next screen depends on the driver you have selected. Usually, you set a user name, a database server name, and a password.
5. Enter all information required by the driver, and click "Save" or "OK."

After the information has been entered, the new System DSN should appear on the list.

Testing the data source

Microsoft Access is a convenient tool for testing the data source. All of the following instructions were written for Access97.

Using Access97 to test a System DSN

1. Double click on the file "C:\PROGRAM FILES\UPS\TRACKPADTCS_LIST.MDB."
2. Select **File -> Get External Data -> Link Tables**.
3. In the "Link" Dialog box, at the bottom left, pull down the "Files of type:" list.
4. At the bottom of the list, select "ODBC Databases."
5. The "Select Data Source" dialog will appear. Click on the "Machine Data Source" tab.
6. Select the data source you created for UPS Trackpad.
7. There will be a delay, and you will see a list of Tables.

When you see the list of tables, your new data source is configured correctly. Verify that the tables you are seeing are from the correct data source.



STEP 2. CREATE THE LINKED TABLE(S)

In Microsoft Access, from the list of Tables retrieved during Step 1, select the table or tables you will need to populate the UPS Trackpad Lists and Company Directory.

After selecting the tables, Access may prompt you to "Select unique record identifier." Cancel this screen. UPS Trackpad will not update the data accessed through the data source.

Each table you selected will now appear along with the existing UPS Trackpad tables in the Table list.

STEP 3. DELETE THE TARGET TABLE(S)

In order to create a dynamic link, you must replace the existing UPS Trackpad static table with a query. Delete any tables from the following list that you plan to replace with a query. For reference, the default tables for UPS Trackpad and their text field definitions are:

UPS Trackpad Table	Column definitions
CUSTOM1 - 20	"item" - 50 characters
DIR_LIST	"Custom1-20," "Email" and "Recipient" – each 50 characters
RECIPIENT	"item" - 25 characters
DEL_List	"Custom 1-10," "Email," and "Recipient" – each 50 characters

These definitions are important for the next step, creating a query in place of the table(s) you deleted.

STEP 4. CREATE NEW QUERIES

Click the "Queries" tab. Click the "New" button. You are given five options, the first two of which can be used to create your query.

The easiest approach is to use the "Simple Query Wizard" to pick all of the relevant fields you will need in order to populate the column or columns needed to replace the target UPS Trackpad table.

After finishing the wizard, you can edit the query using the SQL view (in Design mode) to format the UPS Trackpad linked data as necessary.

The result of your query must match exactly the original definition of the UPS Trackpad table you are replacing. For Custom1 through Custom 20 and Recipient, this means returning a single column called "Item." For DIR_LIST, this means returning all of the columns shown above. However, the column may not need to have any data. If a column is not populated by your query, simply return an empty column by including the statement "NULL as *ColumnName*" in the SELECT clause.



The following examples were extracted from working test scenarios:

Example 1. A Simple Lookup Query

This query replaces the CUSTOM1 table in an installation where Custom1 is defined as "Last Name." The linked table made from the ODBC data source is named SYSTEM_USER_DB:

```
SELECT SYSTEM_USER_DB.LAST_NAME AS ITEM FROM SYSTEM_USER_DB;
```

Example 2. A Filtering Query

This query selects only those names in the location named "HQ":

```
SELECT SYSTEM_USER_DB.LAST_NAME & ", " &  
SYSTEM_USER_DB.FIRST_NAME AS ITEM, SYSTEM_USER_DB.BUILDING AS  
LOCATION FROM SYSTEM_USER_DB WHERE LOCATION = "HQ";
```

You can also filter the results based on joined queries from other tables. We recommend using the Query Design Wizard as much as possible to compose these queries.

SUPPORT ISSUES FOR ONLINE SYSTEMS

ODBC DRIVER SETTINGS ARE USER ACCESSIBLE

The ODBC Control Panel applet is accessible to all users, so the UPS Trackpad ODBC Data Source may inadvertently be modified or deleted.

Installations relying on a UPS Trackpad ODBC DSN should have an "ODBC-readme.txt" file in the C:\Program files\UPS\TCS folder, describing the exact setting made at install time. At a minimum, the readme file should contain:

- the name assigned to the UPS Trackpad DSN,
- the Driver type (and exact version)
- the date that the configuration was put in place
- copies of the SQL query strings from the Access database in this file
- your technical contact
- the sales person's contact information

Supporting notes about the goal of this interface are also helpful for future troubleshooting.

If the driver information is lost, it can be reconstructed by reading this file. This also helps in troubleshooting, as the documented settings can be compared to the DSN settings on the PC if trouble should occur.



LIMITATIONS OF THE MS ACCESS QUERY LANGUAGE AND LINKED TABLES

If a complex query is necessary to return the appropriate data to UPS Trackpad, it may be better to have your database administrator save the query as a "View" or a "pseudo column" in the database if possible. With a server-side query, the server will return only the specific data needed for UPS Trackpad.

If a server-side query or view is put in place, the Access query in TCS_LIST can be simplified to something like "Select * from {UPS TrackpadView} as item." This will always result in the best UPS Trackpad performance.

Note: If the query must join data from more than two tables, or if it must process a large number of records (over a few thousand), a server-side query is strongly recommended. This is because the Microsoft Jet engine working over a network connection to the data source may simply be too inefficient for acceptable performance. Complex queries on large data sets also consume large amounts of RAM on the workstation. This can cause "swapping" which will slow UPS Trackpad performance significantly.

If the customer's linked database will grow over time, a server-side query should be installed before this growth occurs to ensure continued performance of UPS Trackpad in a linked data installation.

APPLICATION LOGGING

UPS Trackpad has the ability to record feature usage and to track performance of database updates. Enabling logging causes UPS Trackpad to record information in a log file named eventlog.txt. This is particularly useful when tuning an installation for the network environment, or to optimize shared databases with multiple workstations using a shared drive. In a heavily used UPS Trackpad System, the log file can become quite large. Because of the file size issue, only enable logging to collect usage and performance data while optimizing the installation. Logging should then be reduced or disabled once the desired performance data has been collected.

Contact UPS Trackpad Technical Support before using these options for advice on how they can best be applied to your situation.

ENABLING AND DISABLING LOCAL EVENT LOGGING

Use a text editor to modify the following line in the [Administration] section of the file Trackpad.ini. The Trackpad.ini file can be found in the UPS Trackpad install directory (default is C:\Program Files\UPS\TCS)

LocalLogEnable = True	This setting will enable UPS Trackpad to log errors and events to the eventlog.txt file.
LocalLogEnable = False	This setting will disable UPS Trackpad from logging events and errors other than startup and shutdown.

Regardless of the setting, UPS Trackpad desktop startup and shutdown events are always recorded in the log file.



Because detailed logging generates a large amount of information (about 2Kb per data update action), it should only be used for short periods of time.

Note: The log file **eventlog.txt** can be deleted at any time. If the log file is deleted while UPS Trackpad Desktop is running, logging will not resume until the desktop is restarted.

ENABLING AND DISABLING NETWORKED SHARED EVENT LOGGING

UPS Trackpad can also send log messages from all desktops to a common file on the network share.

Due to the performance implications of forcing all UPS Trackpad desktops to update the same shared file, this option should only be used under controlled conditions. UPS Trackpad users should be notified before this option is changed. Each UPS Trackpad desktop must be restarted for this change to take effect.

This option is set in the configuration file **tcs_sys.ini** located in the network share directory on the network shared drive. The example below assumes x:\tcsdata as the shared network folder. UNC paths are also supported.

LogToShare = True	All UPS Trackpad desktops will send copies of their log messages to x:\tcsdata\eventlog.txt. Shared logging will occur even if logging is disabled in the local trackpad.ini file.
LogtoShare = False	UPS Trackpad desktops will not send any messages to the shared eventlog.txt file.

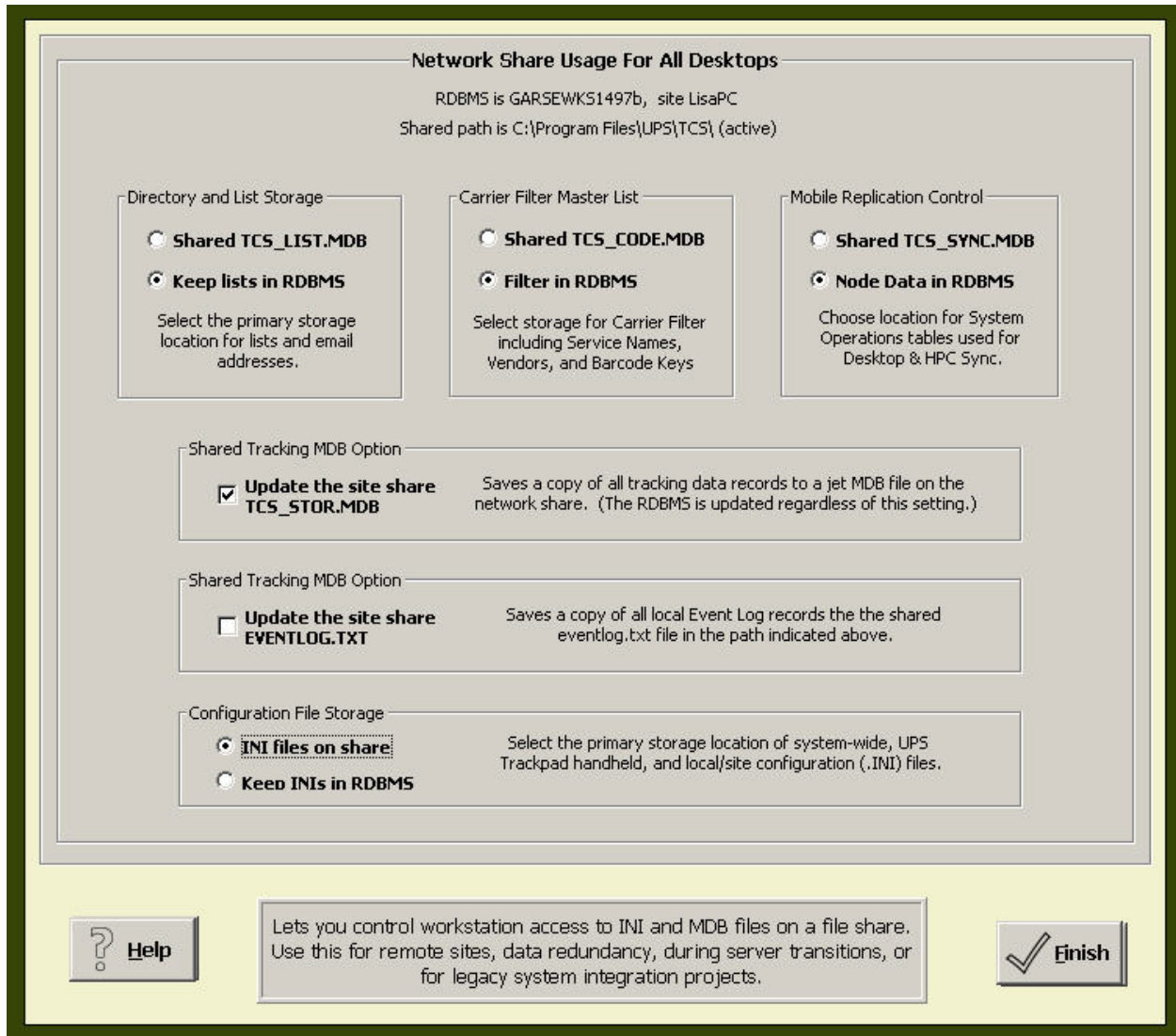


Figure 97 - System Setup Menu Controls Event Log Updates



Symbol 8800 Series Handheld Accessories

The Symbol 8800 series handheld personal computer is one of two HPCs that will work with the Trackpad system. With the release of Trackpad 4.0, the Casio HPCs are being phased out for the more robust Symbol 8800 series HPC.

Several optional accessories are available to make your UPS Trackpad Symbol 8800 series HPC even more convenient to operate. Ask your UPS Professional Services representative about utilizing them for your environment.

FOUR SLOT SERIAL CHARGING CRADLE.

- Allows you to charge four HPCs simultaneously.
- Accommodates either standard battery or larger capacity battery.
- Can be used with TRG8800-00 trigger handles.
- Does not accommodate spare battery charging.
- Part Number: CRD8800-400S.

SERIAL/CHARGING CABLE

- Serial Cable.
- Includes a power supply.
- Includes a nine-pin serial connector.
- Plugs into your UPS Trackpad HPC to both charge it and connect it to your desktop PC.
- Part Number: CBL2700-100U.

LARGE CAPACITY SPARE BATTERY KIT

- Large capacity 3400 mAh spare battery.
- Includes door to the battery compartment.
- Part Number: KT-61579-01.

SINGLE SLOT CRADLE

- Allows one UPS Trackpad HPC to charge and simultaneously connect to your PC.
- Part Number: CRD8800-100S.

STYLUS

- Includes three plastic styluses.
- Each includes a secure HPC tether.



- Part Number: 11-43912-03.

HOLSTER WITH VELCRO CLASP AND BELT

- Convenient for those who do not wear belts.
- Nylon web belt and holster keep HPC handy.
- Part Number: 21-58840-01.



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