MobileTrak™

User Guide

Version 4.6

Sunflower Systems

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TRADEMARKS

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PREFACE

The *MobileTrak™ User Guide v4.6* will help you understand Sunflower MobileTrak 4.6 including a section on the newest features available in MobileTrak. This guide provides insight, overviews, and instructions for this latest release of MobileTrak, whether you're a current user who has experience with previous versions, or a prospective user interested in the new features and functionality that have been incorporated into this version of MobileTrak.

This guide includes information on the following topics:

- Chapter 1 Sunflower Assets Application Setup
- CHapter 2 MobileTrak 4.6 Setup
- Chapter 3 Manage Asset Reads
- Chapter 4 Transfer (Upload) Physical Inventory
- Chapter 5 Get Help
- Appendix A Frequently Asked Questions
- Appendix B Common SyncLink Error Messages
- Appendix C Reports

WHAT'S NEW?

Sunflower MobileTrak improves and simplifies the physical inventory process whether enterprise assets are located in a single building, across town, or across the world. The introduction of Sunflower MobileTrak v4.6, streamlines the physical inventory process with the addition of several new application features and enhanced mobile computing capabilities. This guide contains discussion and reference on the following new features and enhancements:

- **2D Data Matrices:** In addition to supporting traditional scanning methods for 1D barcodes, MobileTrak is also equipped to support the scanning of 2D data matrices (Marks).
- **Radio Frequency Identification (RFID) scanning:** In conjunction with Sunflower Assets, MobileTrak v4.6 can accommodate multiple simultaneous reads of assets with RFID tags, thereby making it possible to scan more than one asset in a given location with just one push of the scanner button.
- **Asset Marks:** With new asset tracking technologies such as 2D data matrix and RFID being integrated into existing asset management processes, it is a requirement in some cases to replace traditional barcodes with new technology. If an asset is affixed with a new mark type and then scanned, MobileTrak will recognize the new mark type and prompt the barcode operator with a decision; Add the Mark to an existing asset or replace the mark.
- **Unique Identification (UID) Entry:** MobileTrak v4.6 supports the entry of Sunflower Assets UIDs, as well as Department of Defense UIDs.
- **User Interface:** MobileTrak's graphic user interface has been given a new look and feel to improve the ease of navigation through the use of icons and more intuitive terminology on the main menu. Although the functionality of the menu items remains the same, the traditional list of menu items has been replaced with icons and accompanying terminology. For example, "File Statuses" is now "Review Scans."
- **Expanded Data Model:** The data model has been expanded to include Organizations, People, Mark Types, Symbologies, and various other tables. Additional validation for fields such as custodian and steward has also been included.
- **Term Set Enabled:** The Term Set (Personalized Application View) feature allows you to change the field names visible not only in your Sunflower Enterprise repository but also on the Barcode Scanner.
- **User Defined Fields Extension:** User Defined Fields (UDFs) have been extended to the MobileTrak application. Based upon your business policy, extend the appropriate UDFs to capture your organization's unique data. Create up to **30** UDFs; these UDFs will display on the barcode scanner Asset Details page when you scan or manually enter an asset.
- **Barcode Menu:** Upon installation and configuration of MobileTrak 4.6 a new menu will be visible within your instance of Sunflower Assets call "Barcode". This menu provides forms and reports specific to the management of Sunflower Mobile Applications. Based on the application you install (i.e. Sunflower MobileTrak), relevant forms and reports will be available for your use.
- **Asset Reads and Asset Receiving:** The MobileTrak menu now contains two ways in which to create an asset read, 1) Asset Reads screen, enhanced but similar to the former Asset Receiving screen, enables you to create resolutions for your physical inventories. 2) The Asset Receiving screen, which while similar to Asset Reads, is provided for the purpose of receiving new assets into your inventory.

- **Error Management**: New forms are available in the Sunflower Enterprise under a new menu called Barcode. Error forms help you manage and resolve issues that may arise when you process and transfer asset reads from the barcode scanner to the Sunflower repository via SyncLink.
- **Report Management:** New reports are available in the Sunflower Enterprise under the menu called Barcode. The reports, Difference Detail by Asset and Error Detail by Error Code enable you to better assess and resolve issues for the assets that are uploaded from the barcode scanner to the Sunflower repository.
- **Mass Transfer:** The mass transfer and print options are no longer available in MobileTrak v4.6. Mass transfers can be performed in Sunflower Assets.

ABOUT THIS GUIDE

The MobileTrak User Guide v4.6 is an introduction to the features and functionality that are compatible with the release of Sunflower Enterprise® v4.5. This guide is not intended to serve as a comprehensive guide for the entire Sunflower product offering. The information provided in this guide addresses new features, functions, and enhancements that have been added to MobileTrak since v4.0.

This document was prepared and tested using an Intermec handheld scanner. MobileTrak functionality will display the same on either the Intermec or Psion Workabout Pro scanners. However, there may be differences in barcode System Utilities tab (which are not MobileTrak functions) options that address the Battery Status and Alarm capabilities of the scanner.

INTENDED AUDIENCE

This guide is designed for functional users who want to learn how to configure and use MobileTrak v4.6 in conjunction with the Sunflower Enterprise v4.5 barcode scanner software suite.

ADMINISTRATORS AND REVIEW MANAGERS

This guide provides administrators and review managers who are responsible for setting up and managing physical inventory efforts in Sunflower Enterprise with illustrations and discussions that address new features of Sunflower MobileTrak v4.6. This guide assumes that you have knowledge of your operating system and the relational database that supports your environment, as well as knowledge of the Review module in Sunflower Assets.

FUNCTIONAL USERS

This guide provides functional users who are responsible for executing physical inventory efforts the knowledge to use the MobileTrak application to collect asset data using a handheld barcode scanner.

DOCUMENT CONVENTIONS

This guide uses the following formatting conventions:

Style	Meaning
Bold	Field Term, Menu Name or Screen Name.
Field Value	Input Value or List Of Values.
Emphasis	Emphasized subject.
NOTE:	Provides additional facts and tips.

NAVIGATION

Menu selections are displayed as a series of steps with bullets that define the name of the menu, submenu, icon, and/or screen.

Example: Access the MobileTrak Setup screen from the mobile device main menu as shown below:

NAVIGATION

- Tap the **Start** icon
- Tap **MobileTrak**
- Tap the **Setup** icon

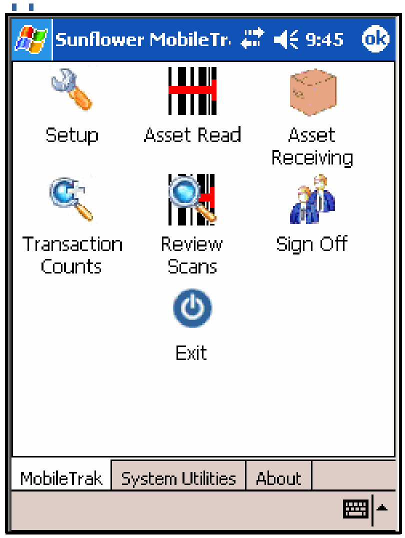

Figure 0-1: MobileTrak Main Menu

Step 1 Tap **Start** on the barcode scanner touch screen.

Step 2 If available, Tap the **MobileTrak** icon on the **Start** menu drop-down.

NOTE: Alternatively, Tap **Start > Programs > MobileTrak**.

Step 3 Tap the **Setup** icon.

PERFORM AN ACTION

When performing a task, the guide will specify when and where you are required to take action by displaying the steps to execute next to the screen graphic, as shown above under **Navigation**.

ADDITIONAL DOCUMENTATION

Visit the Customer Care section of the Sunflower Systems website at http://www.sunflowersystems.com to download the latest user guides for Sunflower Assets, MobileTrak™, ExcessTrak™, PackTrak™, Sentry™ and many other Sunflower product-related services and news.

For MobileTrak 4.6 installation information refer to the Readme.htm and Handheld.htm located in the “Doc” directory of the MobileTrak 4.6 installation zip file.

Access to downloads are available with a Sunflower Passport. Register for a Sunflower Passport on the http://www.sunflowersystems.com website.

CONTACT US

Your comments and feedback are welcome. Contact Sunflower Systems by one of the following:

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2420 Camino Ramon, Suite 130
San Ramon, CA 94583

Voice: (866) 209-3516 x201

Fax: (925) 355-0733

E-mail: helpdesk@sunflowersystems.com **or** training@sunflowersystems.com.

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SUNFLOWER SETUP

A key component of a successful asset management strategy is the physical inventory process. Sunflower Enterprise® facilitates total asset visibility, asset security, and reconciliation of asset records during the physical inventory process by integrating seamlessly with MobileTrak™ to capture asset data with a single click of the scanner button. To make the most of these capabilities it is necessary to define the parameters of the physical inventory you wish to perform.

This chapter will discuss core concepts related to a physical inventory and define the process used to prepare for an inventory using the MobileTrak application. With a basic understanding of physical inventory fundamentals you can begin working with MobileTrak to scan assets.

This chapter will include the following discussion points and concepts:

- Lifecycle Asset Management
- About Physical inventory
- Sunflower Assets Setup

LIFECYCLE ASSET MANAGEMENT

Lifecycle Asset Management is the process of monitoring, managing, and accounting for assets throughout their lifecycle; from the time funds are obligated for an asset and procurement, through transfers of custodial and organizational accountability, *physical inventory reviews*, financial accounting including depreciation, capture of maintenance events, calculation of the cost of ownership, excess determination, and finally, retirement.

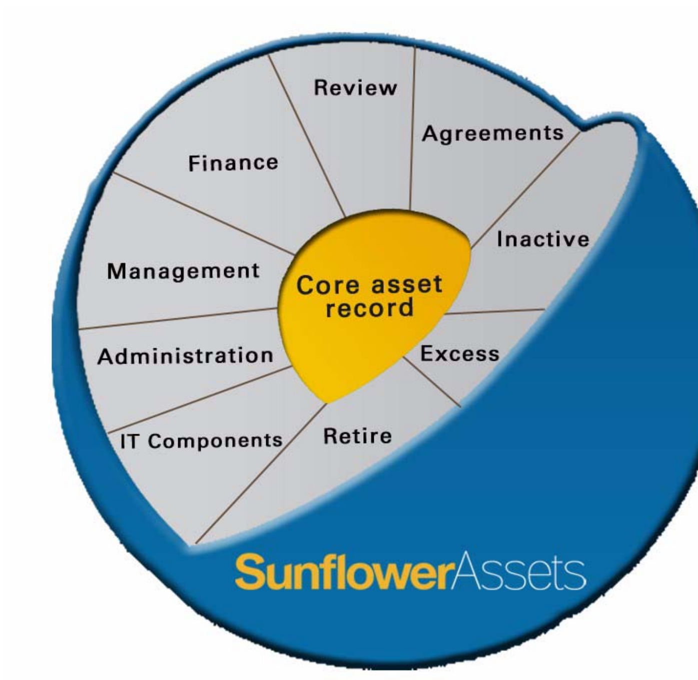


Figure 1-1: Sunflower Assets

Sunflower Assets delivers a robust enterprise application with the capability to manage all aspects of the asset lifecycle, including the audit process. As part of any sound asset management strategy, the auditing (or physical inventory) process facilitates total asset visibility, asset security, and reconciliation of asset records. In conjunction with MobileTrak, Sunflower Assets employs an approach to managing physical inventories that provides unparalleled flexibility, enables multiple inventories to occur at the same time, and drives accuracy and accountability into the review process. This chapter will discuss the setup preparations of a physical inventory to facilitate the auditing process.

ABOUT PHYSICAL INVENTORY

The setup of a physical inventory begins within the Sunflower Assets application by creating a review campaign in the Review module. Working within the guidelines of your organization's audit cycle (e.g. annual, semi-annual, quarterly, etc.), the following steps are performed by the Review Manager to establish a review campaign in Sunflower Assets:

Step 1 **Define a campaign:** The review campaign establishes the parameters within which you intend to conduct your physical inventory (e.g. campaign name, sponsor, start/end dates, type of sampling, transaction types, etc.).

Step 2 **Define the baseline:** The baseline specifies the group (base) of assets to be accounted for within the specified review campaign.

Step 3 **Freeze the baseline:** Freezing the baseline enables you to perform the review for a predefined set of assets against a specified period of time, without being concerned about "asset creep" (newly created assets constantly being added to the campaign).

Step 4 **Define resolution types:** The resolution types indicate the method you intend to use to locate and/or validate the assets for your review campaign, (e.g. MobileTrak barcode scanning, online declarative, online physical, etc.).

It should be noted that although setting up a review campaign facilitates an efficient and organized auditing process, assets that are found and not part of the existing baseline can still be scanned (or manually entered) and accounted for using MobileTrak and Sunflower Assets. The use of the MobileTrak application does not require a campaign be established in order to use the software.

Refer to the *Sunflower Enterprise Assets v4.5 User Guide* (available for download from Customer Care (http://www.sunflowersystems.com) for detailed information on setting up a review campaign.

Physical Inventory Process

The MobileTrak application is equipped with several features to support physical inventories in a variety of situations whether the assets are located in a single building, across town, or across the country. In addition to recording automated barcode scans (asset reads) on the spot, MobileTrak enables you to manually capture information for new assets using the asset identifier or the UID (Unique Identifier), as well as make changes to existing assets found in the reference database. The following diagram depicts a typical physical inventory process using MobileTrak.

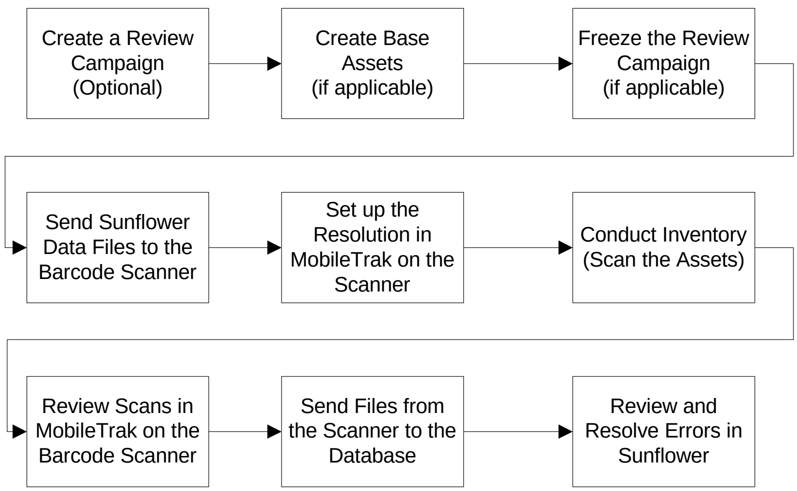


Figure 1-2: Flowchart illustrating a typical physical inventory process

MobileTrak Barcode Scanning Process

Sunflower Assets, in conjunction with MobileTrak, provides mobility in the tracking and management of your assets. MobileTrak enables field representatives to conduct a physical inventory with the use of a hand held barcode scanner. The scanning of an asset not only validates that the asset exists, but further documents the asset's existence by identifying the location of the asset and the individual who performed the scanning activity. The following flowchart depicts the barcode scanning process using MobileTrak.

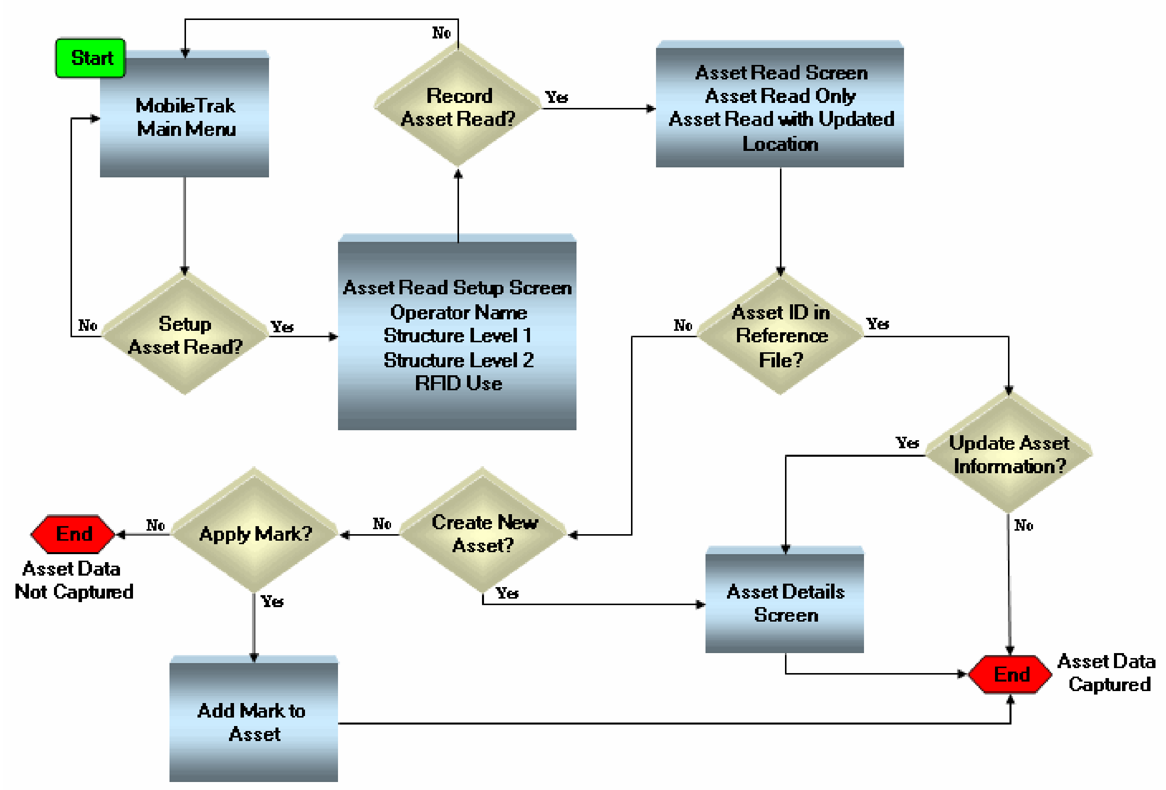


Figure 1-3: MobileTrak scanning process

SUNFLOWER ASSETS SETUP

After the initial installation of MobileTrak 4.6, there are business decisions you need to consider regarding which forms and tables to populate before using your barcode scanner(s); which include:

- Force Authorization
- Term Set
- Extend Valid Asset Events (by creating User Defined Fields)
- Maintaining Approvers
- Maintaining Operators

This section discusses the setup requirements, which must be performed by your Sunflower Systems Administrator.

NOTE: The Sunflower Assets Functional Foundation (SFA200) course discusses and the Sunflower Assets Administration (SFA300) course provide in-depth coverage of the Term Set and User Defined Field options.

Force Authorization

Force Authorization determines if you can enter the **Operator Name** on the Barcode Scanner's Asset Read Setup screen or if that data is determined by the user that Logs In to SyncLink. The figure below illustrates where to set the Force Authorization parameter values.

The default Value is **Y** (Yes) which indicates that the Barcode Scanner operator must be authenticated. Based upon your Business Policy, select **Y** (Yes) or **N** (No) for the **Value** field.

Navigation

- Click **Admin**
- Click **User Extensibility**
- Click **Enter Registered Application Parameter Values**
- Enter **FORCEAUTH** in the Code field.
- Click the **Find** icon.

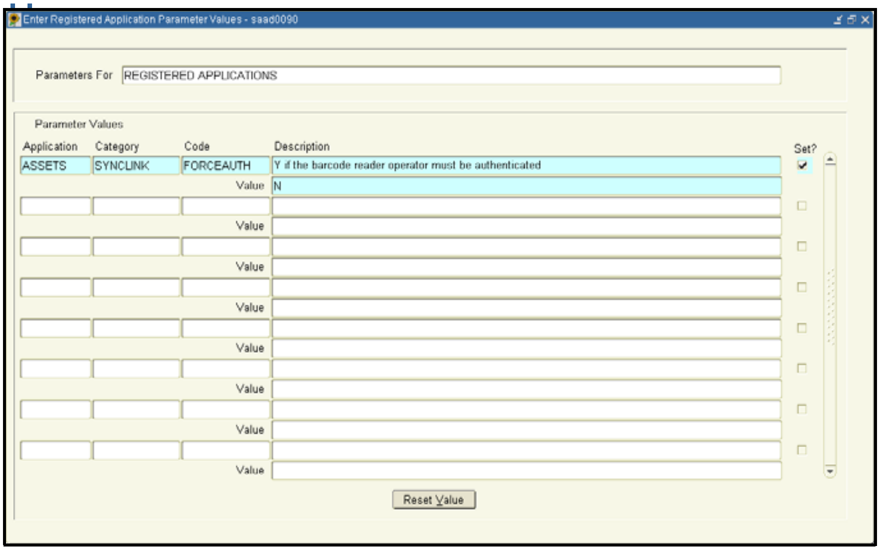


Figure 1-4: Force authorization parameter setting

As shown above, when you change any factory delivered setting on the Enter Registered Application Parameter Values form, the **Set?** checkbox automatically is enabled (checked).

To revert a line item back to the factory delivered value select (highlight) the line item and click the **Reset Value** button at the bottom of the page.

TERM SET

The Term Set (Personalized Application View) feature allows you to change the field names visible on the Barcode Scanner (i.e. change **Steward** to Department, Cost Center, or Project). The figure below illustrates where to create and change the Barcode Scanner term set values.

NOTE: If you are not currently using modified Term Sets in your Sunflower instance then you must first create a new Term Set value to be able to change terminology as the delivered Sunflower Systems term set can not be modified.

NAVIGATION

- Click **Admin**
- Click **Domains**
- Click **Maintain Domains**
- Enter **T%** in the **Name** field.
- Click the **Find** icon.

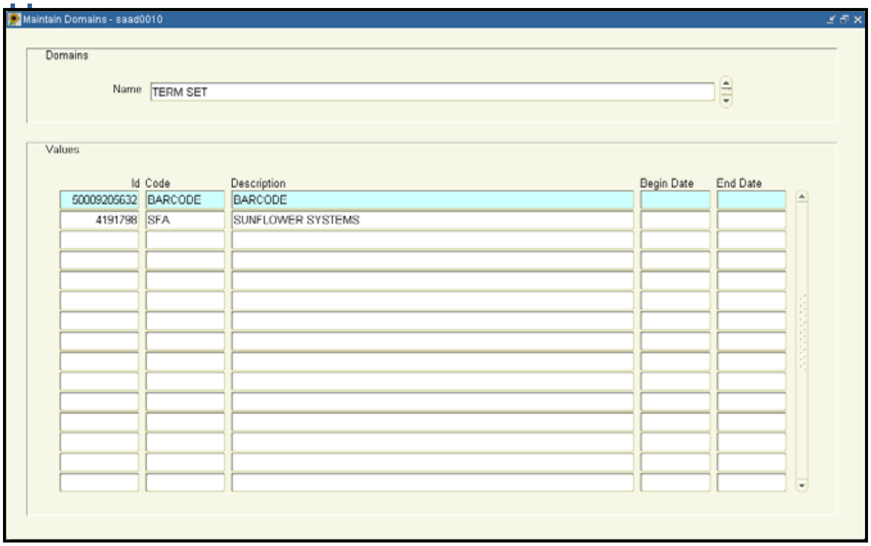


Figure 1-5: View where you create and change a new term set Value (i.e. BARCODE).

Once you create a new Term Set, you can personalize the field names in accordance with your Business Policy. The next two figures illustrate how to access and change the field name **Steward** (a default name in Sunflower Assets) to **Department**.

NAVIGATION

- Click **Admin**
- Click **User Extensibility**
- Click **Maintain Terminology**

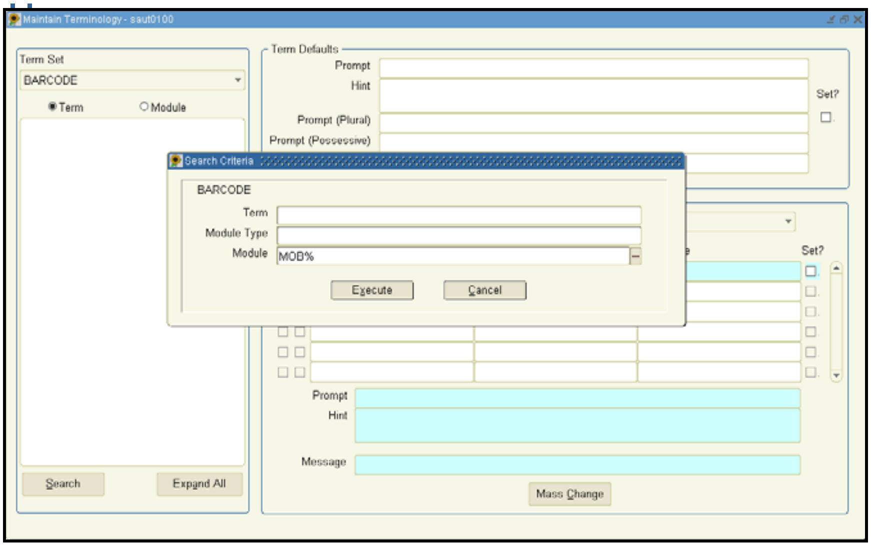


Figure 1-6: Personalize term set field names.

Step 1 In the **Term Set** dropdown select the newly created Term Set (i.e. BARCODE).

Step 2 Accept the **Term** radio button default.

Step 3 Click the **Search** button, which opens the Search Criteria pop-up window.

Step 4 Enter **MOB%** in the Search Criteria **Module** field and click the **Execute** button.

Step 5 Select (highlight) **STEWARD NAME**, which populates the **Term Defaults** and **Items** block.

Step 6 Change the term **Steward** to **Department** (circled below).

NAVIGATION

- Click **Admin**
- Click **User Extensibility**
- Click **Maintain Terminology**

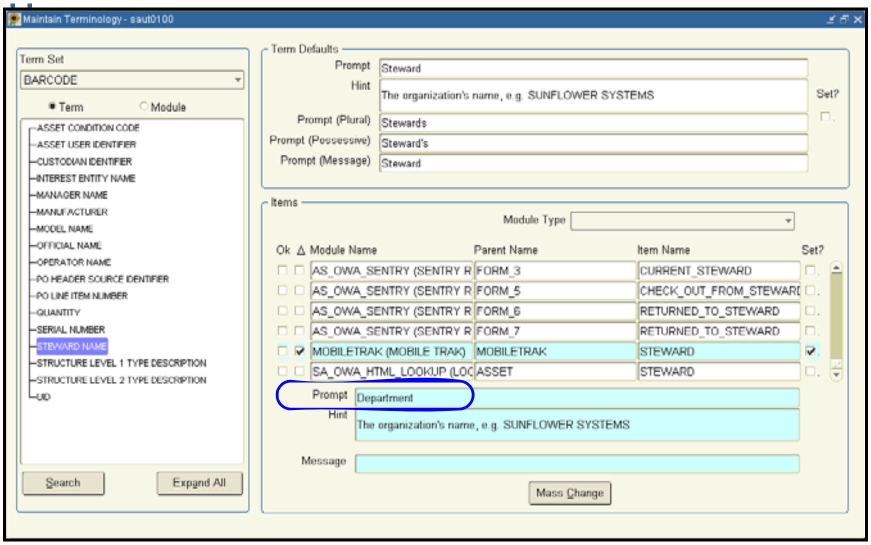


Figure 1-7: View where to make the appropriate changes to change from Steward to Department.

Step 2 Save your changes.

Note: You may need to completely close and then re-open Sunflower Assets in order to see the change reflected, especially if you made global changes to the Sunflower Forms as well as the Mobile device.

EXTEND VALID ASSET EVENTS

Based upon your Business Policy, extend the appropriate User Defined Fields (UDFs) to capture your organization’s unique data. You can create up to **30** UDFs per Context Value entry (or **_NO_CONTEXT_** as shown in this example).These UDFs will display on the barcode scanner **Update Asset - Page 2 of 2** page when you scan or manually enter an asset.

This section illustrates where you can extend UDFs. The example illustrates how to add the field “**Comments**” as a UDF which will then display as a field when using MobileTrak. To learn more about creating UDFs refer to the *Sunflower Enterprise Administration v45 User Guide*, available for download from the Customer Care center (www.sunflowersystems.com).

NAVIGATION

- Click **Admin**
- Click **User Extensibility**
- Click **Maintain Attribute Sets**
- Select **ASSET READ UDF**

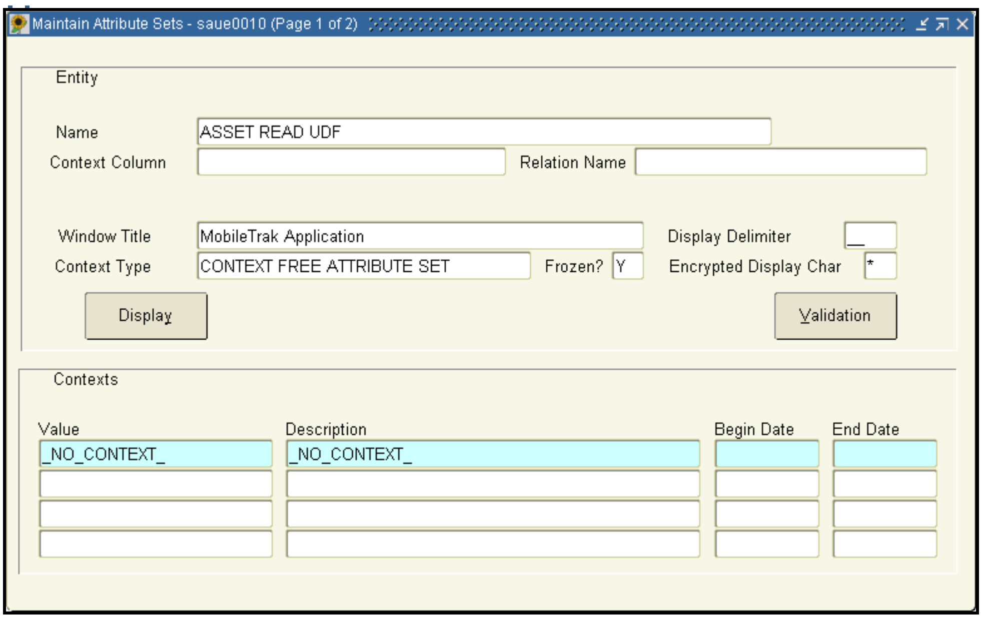


Figure 1-8: Extending UDF for mobile application use.

Step 1 Navigate to the Maintain Attribute Sets form, which opens in the **Query** mode.

Step 2 Click the **Find** icon **once** and scroll until **ASSET READ UDF** displays in the **Name** field.

Step 3 Click the **Next Block** icon, which automatically highlights **_NO_CONTEXT_**.

NOTE: To create new UDFs, you would first change the **Frozen?** field to **N** (No) and change it back to **Y** (Yes) when you have completed the attribute definitions.

Step 4 Click the **Next Block** icon to go to the Attribute Definitions form and enter the desired data.

NAVIGATION

- Click **Admin**
- Click **User Extensibility**
- Click **Maintain Attribute Sets**
- Select **ASSET READ UDF**
- Select **_NO_CONTEXT_**
- Click the **Next Block** icon
- Click the **Display** button

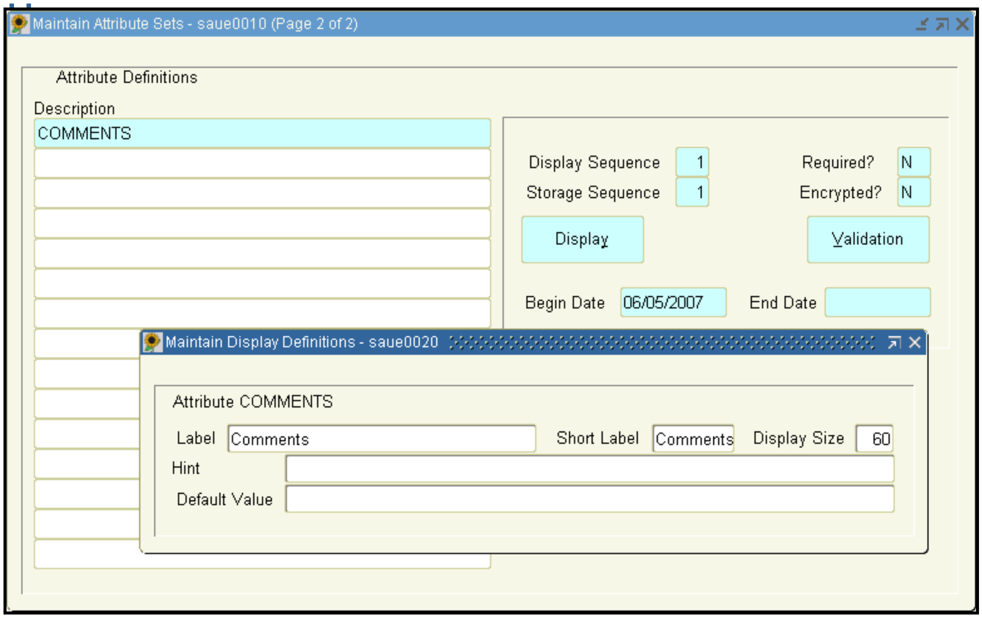


Figure 1-9: UDF attribute definition form.

Step 2 Click the **Exit** icon to close the Maintain Display Definitions form.

Step 3 Click the **Validation** button (and then click the **Cancel** button) to display the Maintain Validation Definitions form, as shown below.

NAVIGATION

- Click **Admin**
- Click **User Extensibility**
- Click **Maintain Attribute Sets**
- Select **ASSET READ UDF**
- Select **_NO_CONTEXT_**
- Click the **Next Block** icon
- Click the **Validation** button

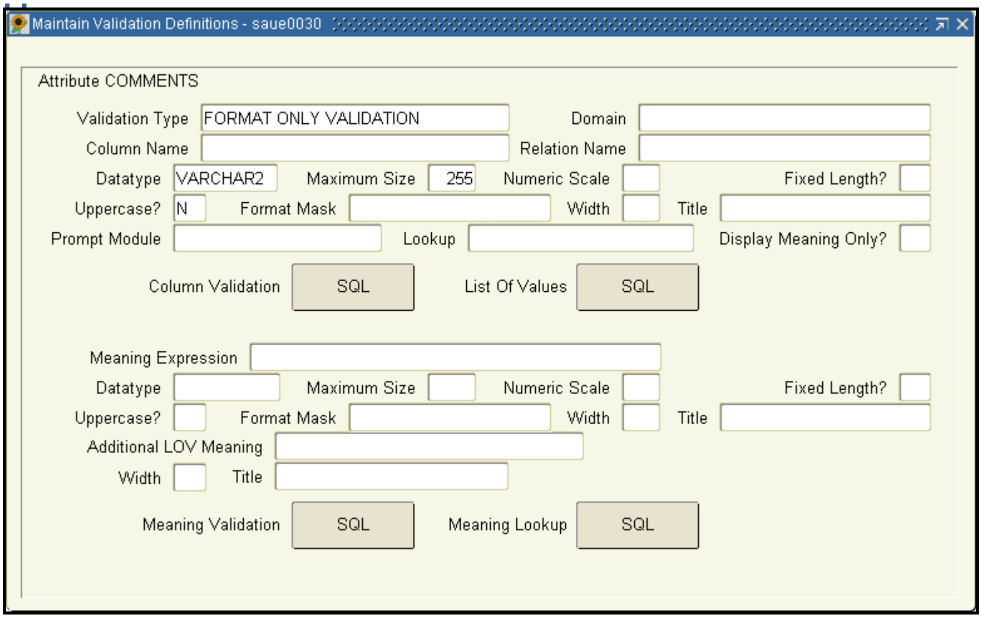


Figure 1-10: Maintain Definition form.

Step 2 Click the **Exit** icon to close the Maintain Validation Definitions form.

Step 3 Click the **Previous Block** icon to return to the Maintain Attribute Sets form.

Note: UDFs created for Organizations and/or People will either have a drop-down or will be free text entry, based upon how you establish their Validation.

The following figure shows an example of a User Defined Field (UDF) named **Comments** in MobileTrak.

NAVIGATION

- Tap **Start**
- Tap **MobileTrak**
- Tap **Setup** and enter the appropriate data
- Tap **Asset Read** and enter the appropriate data
- Tap the **ok** button
- Tap the **Next** button
- Scan or Manually Enter an Asset
- Tap the **Update** button
- Tap the **Next** button
- Scroll down the page until the **UDF** displays

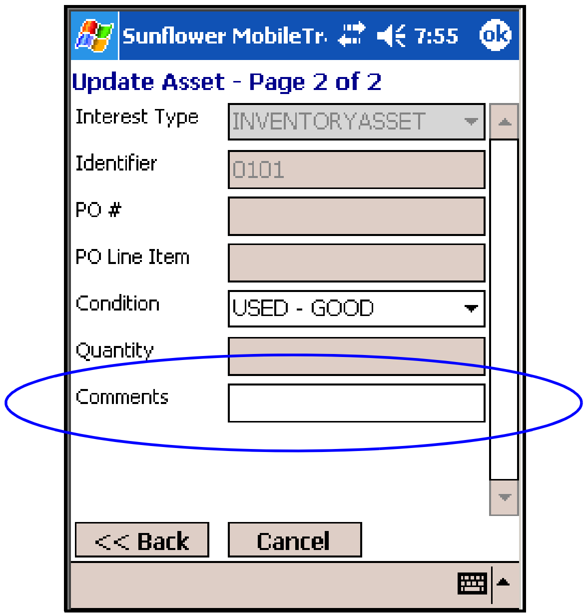


Figure 1-11: UDFs extended in the MobileTrak application.

Note: During installation, user code must be established to handle the user defined fields data entry when barcode scanned data is sent to the Sunflower Enterprise database. Otherwise the user defined field data will be lost during the barcode scanner upload process.

MAINTAIN APPROVERS

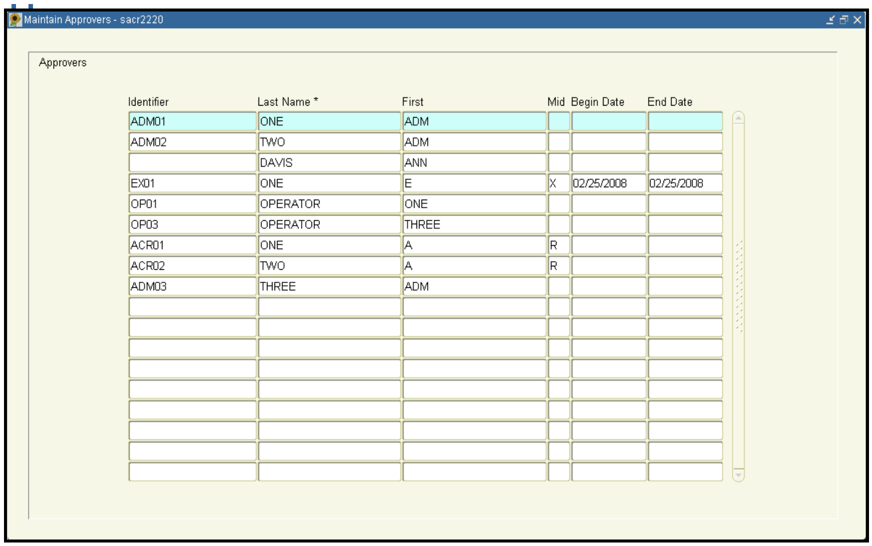
Use the Maintain Approvers form to allow individuals to Create New Assets or Update Existing Assets in the Sunflower database via the Barcode Scanner. Otherwise the new/updated asset information will not process through the appropriate interface table (i.e. Edit Inventory Asset Interface Records). Regardless of whether a person has been added to this form, the Resolution will still occur in the Review module.

- Add individuals to the Maintain Approvers form.

Note: Approvers must already be in the Sunflower Enterprise People table.
If they are not, select Admin > People > Maintain People and create Person records as required. The figure below illustrates how to add individuals to the Maintain Approvers form.

NAVIGATION

- Click **Admin**
- Click **People**
- Click **Maintain Approvers**



Maintain Approvers - sacr2220

Approvers

Identifier	Last Name *	First	Mid	Begin Date	End Date
ADM01	ONE	ADM			
ADM02	TWO	ADM			
	DAVIS	ANN			
EX01	ONE	E	X	02/25/2008	02/25/2008
OP01	OPERATOR	ONE			
OP03	OPERATOR	THREE			
ACR01	ONE	A	R		
ACR02	TWO	A	R		
ADM03	THREE	ADM			

Figure 1-12: Maintain Approvers form.

If you do not add an individual to the approver's list you can still perform a physical inventory and do asset reads; however, any data changes would not be allowed and the uploaded data would go into the Interface table, awaiting action from a Sunflower Assets user.

MAINTAIN OPERATORS

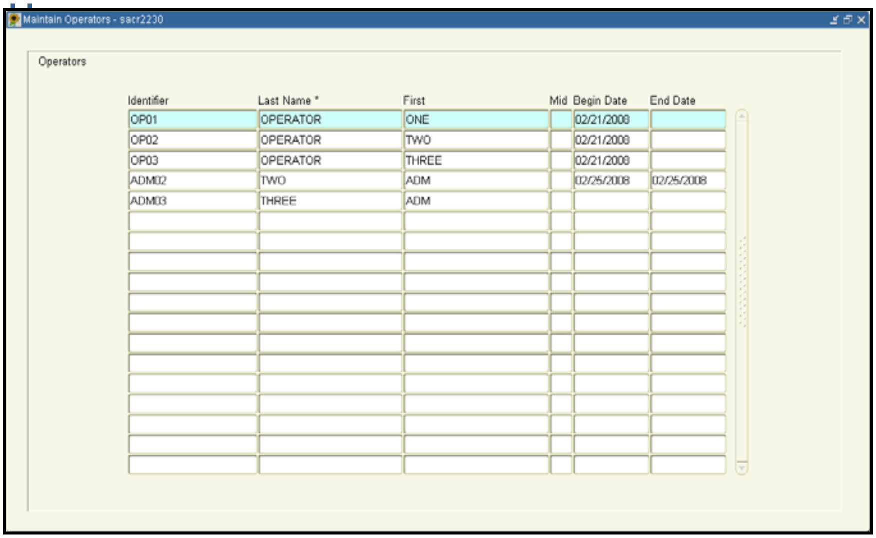
Use the Maintain Operators form to determine the list of operators in MobileTrak. An operator is the person scanning assets. This list of values (LOV) will be available if the FORCEAUTH (Force Authorization) parameter is set to **No** in Sunflower Assets. If Force Authorization is set to **Yes**, then the Scanner Operator defaults to the person that performed the SyncLink Login.

Of note; you can manually enter an individuals name if it is not in the LOV; however, if the entry is not in the proper format, then the Resolution data goes into the Edit Resolution Interface Records table, awaiting action from a Sunflower Assets user.

Note: Operators must already be in the Sunflower Enterprise People table.
If they are not, select Admin > People > Maintain People and create Person records as required. The figure below illustrates how to add individuals to the Maintain Operators form.

NAVIGATION

- Click **Admin**
- Click **People**
- Click **Maintain Operators**


Maintain Operators - sacr2230

Operators

Identifier	Last Name *	First	Mid	Begin Date	End Date
OP01	OPERATOR	ONE		02/21/2008	
OP02	OPERATOR	TWO		02/21/2008	
OP03	OPERATOR	THREE		02/21/2008	
ADM02	TWO	ADM		02/25/2008	02/25/2008
ADM03	THREE	ADM			

Figure 1-13: Maintain Operators form.

This completes the Sunflower Assets portion of the MobileTrak Setup.

MOBILETRAK™ SETUP

2

MobileTrak™ is a Sunflower Assets® inventory management tool that is deployed via a fully integrated barcode reader that records and delivers asset information directly to your Sunflower Assets database. By integrating Sunflower Assets with mobile computing technology solutions, MobileTrak meets the needs of enterprises that track and manage assets using various types of data collection technologies such as traditional bar codes, 2D data matrices, and Radio Frequency Identification (RFID) tags. MobileTrak records and then delivers your inventory data back to Sunflower Assets on demand.

This chapter will include the following discussion points and concepts:

- MobileTrak Overview
- Preparing to Use MobileTrak
- Launch MobileTrak
- MobileTrak Icons
- MobileTrak System Utilities
- Terminate a MobileTrak Session

MOBILETRAK OVERVIEW

By integrating Sunflower Assets with mobile computing capabilities, MobileTrak meets the needs of enterprises that track and manage assets using various types of data tracking methods such as 1D barcodes, 2D data matrices (Marks), and/or RFID tags. MobileTrak records inventory data gathered in the field during a physical inventory and then delivers the data back to Sunflower Assets on demand. The benefits of using mobile computing capabilities to manage your physical inventories include:

- Immediate notification of asset status, asset additions, reviews and/or deletions, and additional details such as the individual who performed the scanning activity and the asset's location.
- The capability to transfer (download/upload) multiple assets in one action.
- Advanced filtering capabilities allows for specific sites, campaigns, stewards, agreements, or any combination of these four choices to be transmitted into the core reference file, which provides complete accuracy of each inventory.
- File transfers through standard protocols gives MobileTrak users the capability to transmit inventory files directly to a central location using STMP protocols rather than conducting multiple file uploads.

MobileTrak includes all of the files needed to perform a physical inventory with your barcode scanner, which includes the files that populate drop-down lists in the barcode scanner application and an asset reference database. Identification of an asset for physical inventory begins by defining a review campaign in Sunflower Assets. Once the campaign is defined, the reference data is downloaded from Sunflower Assets to the scanner. The scanner can then be used to locate and scan the asset's barcode, called the Identifier, which identifies the asset in the same manner as a social security number identifies one person from another. Additionally, MobileTrak is capable of handling manual entry of asset identifiers and unique identifiers (UIDs) directly into the scanner if a barcode is damaged or unscannable.

Note: You have the option of connecting your Barcode Scanner base via USB or Ethernet. Ethernet requires additional setup. If using the Ethernet, connect the USB just to create a Partnership and then disconnect the USB cable. Contact the Sunflower Helpdesk for details. The Sunflower Helpdesk can be reached at:

Phone: 1-866-209-3516

Email: helpdesk@sunflowersystems.com

PREREQUISITE FOR SUNFLOWER MOBILETRAK

This guide assumes that the MobileTrak application has been installed onto the requisite handheld scanner(s) and that the appropriate patches have been installed in the Sunflower Assets 4.5 application.

For more information about the installation process refer to the ***MobileTrak Installation*** guide located in Product Downloads on the Sunflower Customer Care website: http://www.sunflowersystems.com.

PREPARING TO USE MOBILETRAK

Prior to using the MobileTrak application for the first time in the field, it is necessary to perform a few configuration steps to ensure the appropriate assets and reference data are available during a review campaign. These steps include:

Step 1 Create a Partnership (Standard or Guest) using Microsoft ActiveSync.

Step 2 Launch Sunflower SyncLink (login to the Sunflower Assets application).

Step 3 Determine the interest asset type or type(s) to be inventoried.

Step 4 Optionally apply data filters.

Step 5 Determine data to be transferred to the mobile application:

- All or selected Catalog data
- All or selected People data
- All or selected Managers
- All or selected Stewards

Step 6 Transfer data and look up files from the Sunflower database to the mobile application.

Create a Partnership Using Microsoft ActiveSync

If you will be sending a large amount of data to the scanner based on your number of assets, organizations, people, and catalogs then you should use an ethernet connection to the cradle (see “Ethernet Connection” below).

Of note, you will normally use a Standard Partnership with an ethernet connection to the cradle and typically use a Guest Partnership when using a USB connection to the cradle (see “Serial Port/USB Connection” on page 2-37).

The following guidelines are provided based on the setup required for an Intermec (model: 700c) scanner. This process applies to all scanners that provide an ethernet connection but other scanners may have slight variances in their configuration screens.

ETHERNET CONNECTION

Setting up activesync to work with an ethernet connection will enable you to upload and download asset records in a shorter period of time as compared to a standard serial port/USB connection. The basic steps required include:

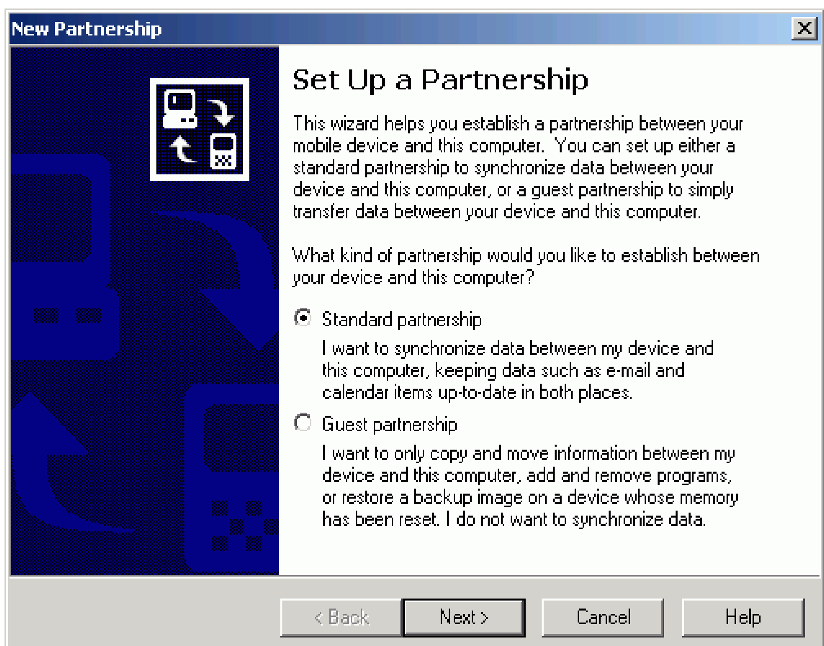
1. **Create a partnership**.
2. On your desktop, or laptop computer, change the Microsoft ActiveSync connection setting to **enable an Ethernet connection from your PC**.
3. On your scanner, update the options in ActiveSync to **enable an Ethernet Connection from the scanner**.

The following steps will guide you through the specific setup steps.

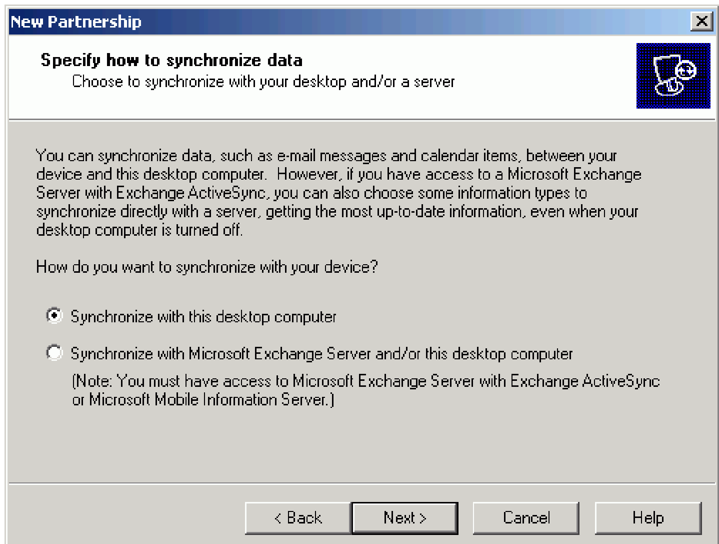
PART 1: CREATE A PARTNERSHIP

There are five steps required to create a partnership with an Intermec scanner running the Pocket PC operating system and using ActiveSync version 4.5. Note that the steps that you follow may vary slightly if you are using a different version of ActiveSync.

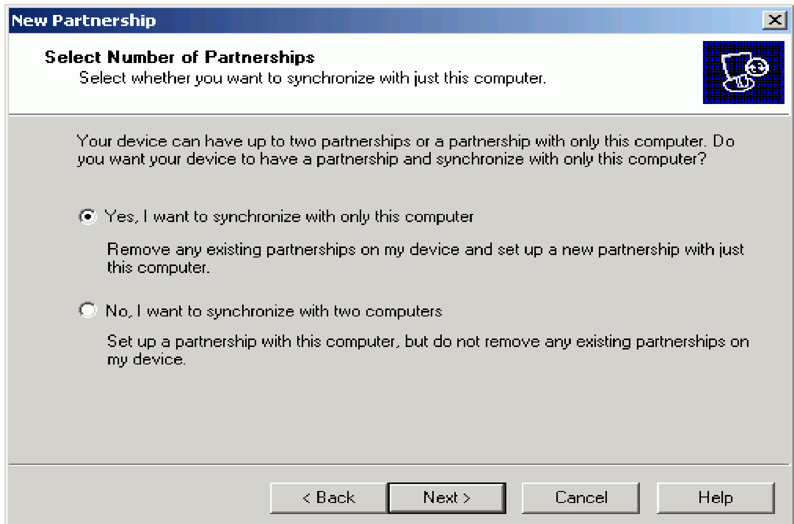
Step 1 To create a partnership connect the USB cable from the Intermec scanner to your PC that has Microsoft ActiveSync installed. A window will display asking you the type of partnership that you want to create. Select the **Standard partnership** radio button. Click the **Next** button



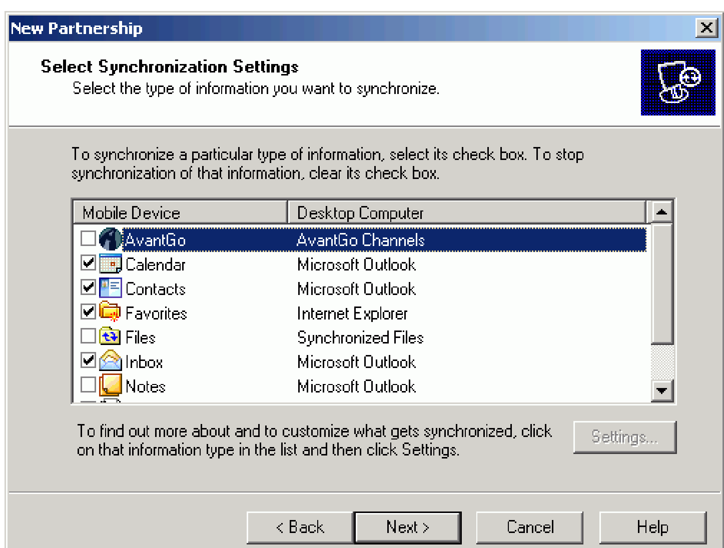
Step 2 Specify how to synchronize the data. Select the Synchronize with this desktop computer. Click the **Next** button



Step 3 Create partnerships. Select Yes, I want to synchronize with only this computer. Click the **Next** button.

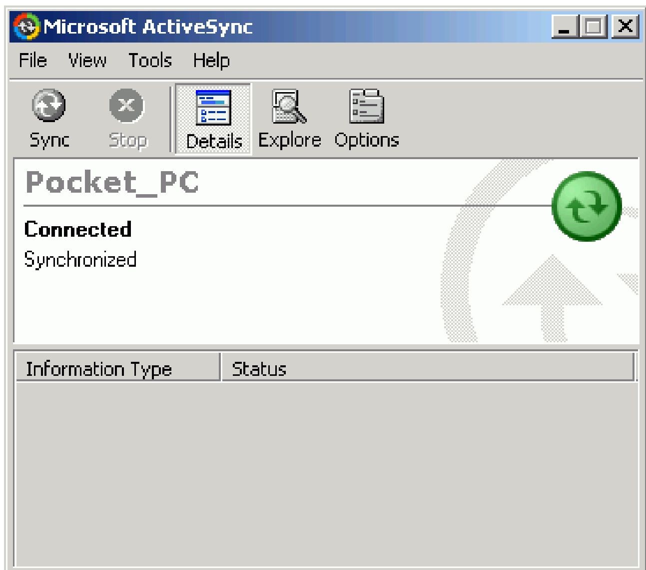


Step 4 Select the synchronization settings. Remove the check marks from every application in the Mobile Device column. Remember to scroll the window down using the scroll bar at the left of the window and remove the check marks from every application. Click the **Next** button.



Step 5 The next step completes the setup. Click the **Finish** button.

- Activesync makes the synchronization connection.
- The ActiveSync window will display. Synchronization is taking place between your desktop and the scanner. Synchronization may take a few minutes; when it is complete, Connected and Synchronized display in the window, see picture below.



- Now you may disconnect your USB port.

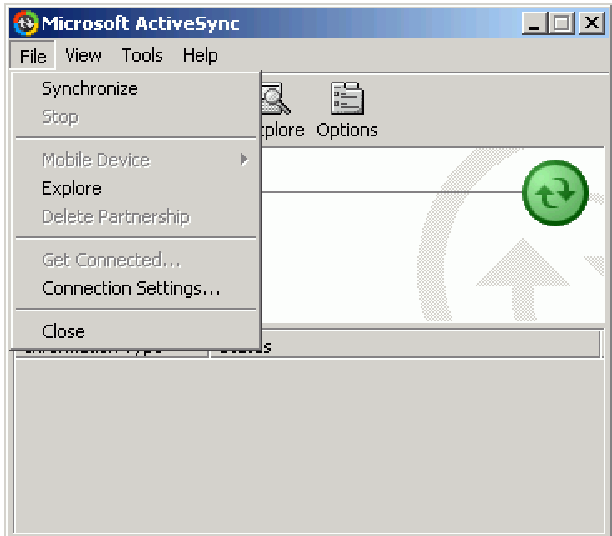
PART 2: Enable An Ethernet Connection From Your PC

In the following section use your desktop, or laptop computer, to change the Microsoft ActiveSync connection setting to allow an Ethernet connection.

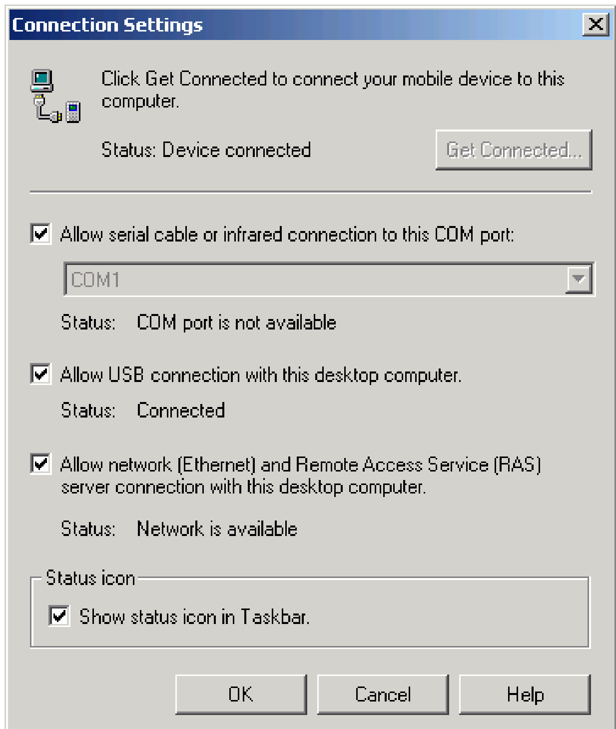
Step 1 From your PC, open the Microsoft ActiveSync window.

- You may have the window open based on the last step of the previous instruction describing how to create an Ethernet connection.
- You may need to double click the ActiveSync icon in your system tray (a round icon either grey or green with two arrows going in a circle).
- You may need to select Start -> Programs and find ActiveSync.

Step 2 From the ActiveSync window click the **File** menu then click **Connection Settings**.



Step 3 In the connection settings check the box next to **Allow network (Ethernet) and Remote Access Service (RAS) server connection with this desktop computer.**



Step 4 Click **OK.**

PART 3: ENABLE AN ETHERNET CONNECTION FROM THE SCANNER.

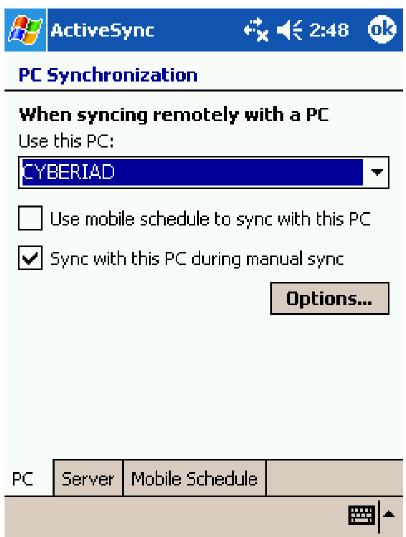
The following discussion will address how to enable an ethernet connection from your handheld barcode scanner.

Step 1 Connect the ethernet cable to your cradle or scanner.

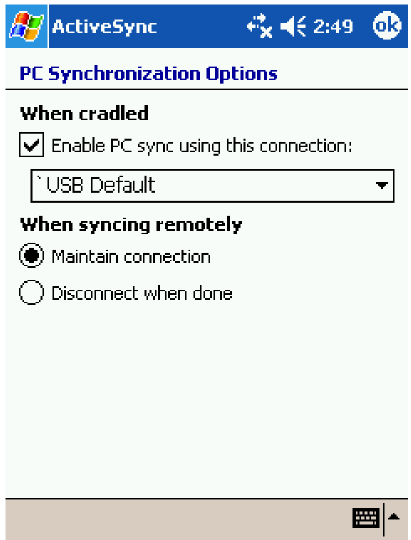
Step 2 Remove the scanner from the cradle. Tap **Start** and then tap **ActiveSync** from the scanner menu.

Step 3 Select **Tools**, then select **Options**, and choose to **Sync with this PC during manual sync**.

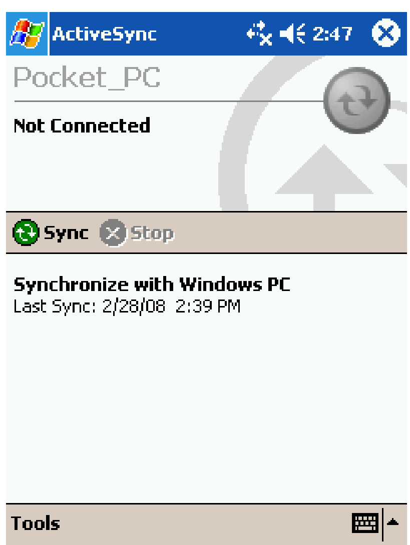
- Notice that *Use this PC* has the name of the PC that was used to create a partnership.



Step 4 Then select the **Options** button and select the **Maintain connection** radio button and click OK.



Step 5 Tap the Sync icon (located in the middle of the window with a green round icon with two arrows).



RE-INITIATE AN ETHERNET CONNECTION

If for any reason you are required to perform a hard boot on your PC or your scanner the ethernet connection will be broken. To reconnect the ethernet connection perform the following.

Step 1 From the scanner, tap **Start**, then tap **Settings**.

Step 2 Tap the **Connections** tab.

Step 3 Tap the **Connections** icon.

Step 4 Tap the **Advanced** tab.

Step 5 Tap the **Select Networks** button.

Step 6 In the first dropdown, select the **My work Network** option from the list of values.

Step 7 Tap **OK**.

Step 8 Go to Activesync and select the **Sync** icon.

For additional consideration refer to the installation instructions for additional details regarding the ethernet connection.

An alternative connection option is the use of a USB connection.

SERIAL PORT/USB CONNECTION

If you are using a USB connection, refer to the following discussion.

Microsoft® ActiveSync® is a tool used to join together the file transfer capabilities of Sunflower SyncLink™ with the mobile computing capabilities of MobileTrak™. When the barcode scanner is connected to your computer, it searches for ActiveSync. Select **Guest partnership** unless you are the only individual to use this barcode scanner and then click the **Next** button.

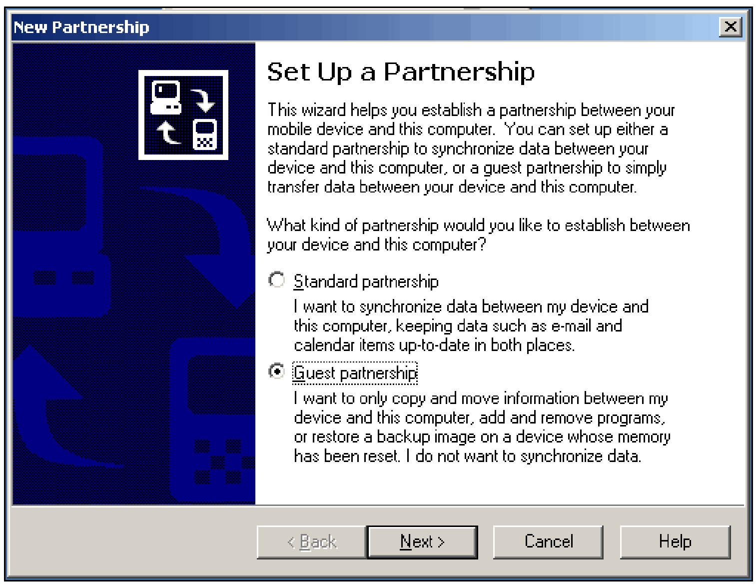


Figure 2-1: ActiveSync Partnership

In a connected state, ActiveSync enables communication between SyncLink and MobileTrak for successful data transfer between the files in the Sunflower database and the MobileTrak application. There is no data entry required in ActiveSync, except to select the appropriate Partnership. The ActiveSync dialog box will display information to verify the computer and barcode scanner connection, as shown below.

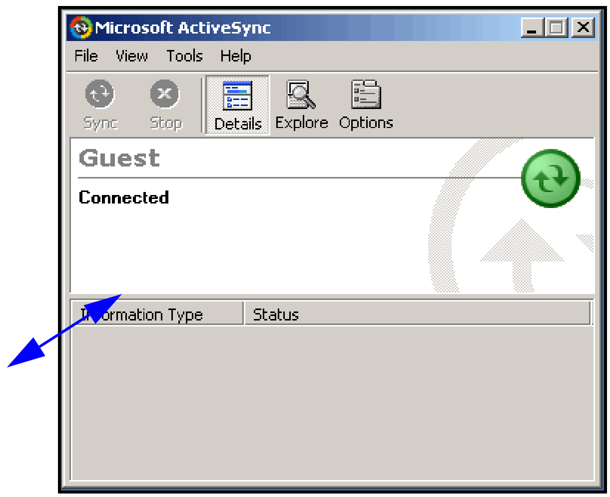


Figure 2-2: ActiveSync Connection Status

Step 1 Connect the scanner (cradle) to your computer.

Step 2 Turn on the scanner, which automatically launches (opens) Microsoft ActiveSync.

Step 3 Set up a partnership; **Guest** is recommended, unless you are the **only** barcode user.

Step 4 Click the **Next** button to display the ActiveSync status window, shown above.

Step 5 Once **Connected**, minimize or close the ActiveSync window.

Note: Once connected you may minimize or even close the ActiveSync window. If you close it, you will notice an ActiveSync icon remains open (active) in the tray of your Windows Task bar.

LAUNCH SYNCLINK

SyncLink is used to transfer (download) asset data from your Sunflower Assets database to your handheld barcode scanner containing the MobileTrak application. Synclink is also used to send asset data from your handheld barcode scanner back to your Sunflower Enterprise database. SyncLink must be used to send files to the scanner and retrieve files from the scanner.

When you log into SyncLink, Sunflower Enterprise is used to validate the permissions a user has according to how the user has been set up in the application's Administration module. For example, if a user has logged into SyncLink as an Inventory Manager, then the user is authorized to change *all* inventory assets. However, if the user is set up as an Inventory Clerk or Asset Center Representative, then the user is only authorized to change assets for the steward organization *to which they are assigned* as an Organization Contact.

Step 1 If available, double click the SyncLink icon on your desktop to open Sunflower SyncLink or navigate to the SyncLink.exe file to launch SyncLink.

Step 2 Enter your Sunflower Username and Password.

Step 3 Click the **Login** button.

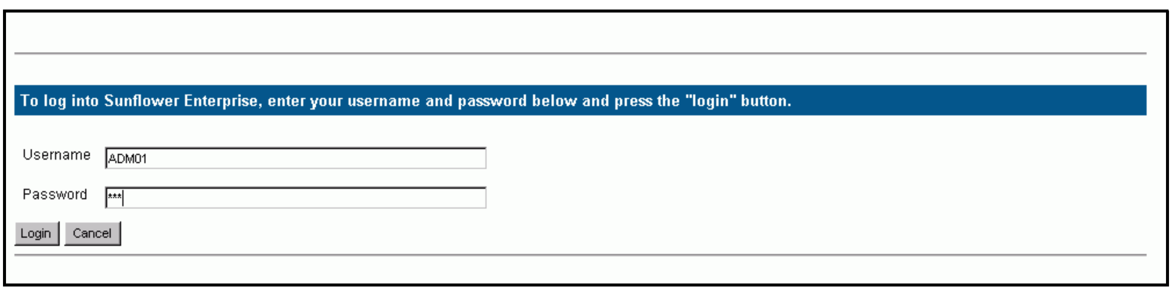


Figure 2-3: Login to SyncLink using Sunflower Enterprise

Note: Sunflower Enterprise is used to validate role permissions available to the person logging in. This means that all of the rules used in Sunflower Enterprise pertaining to roles and appropriate authorization are also applicable in MobileTrak.

About Lookup Files

To start MobileTrak on a barcode scanner, data must first be loaded from the Sunflower Assets (SFA) database. The data from Sunflower Assets includes the assets and the reference data used to populate drop down lists for fields such as sites, structure levels, steward, manager, custodian, user, and the asset catalog to name a few.

In order to work with the Sunflower Assets (SFA) data you will use SyncLink as the conduit to transfer data between SFA, your PC, and the barcode scanner for use with the MobileTrak application. When new data such as a catalog entry, site, structure level 1 type, structure level 2 type, or interest asset is added to your Sunflower Assets database, you will perform the following actions to update the MobileTrak application: Load lookup files, Select the interest asset type or types, and Send the data to the barcode scanner.

Note: If left unchecked (default setting) only the catalog, people, manager, and steward entries associated with your selected assets are transferred to the barcode scanner.

To facilitate the transfer process the following table describes checkboxes that are available in SyncLink:

Checkbox	Description/Explanation
Download	**Defaults**. Used to transfer data from the Sunflower Assets (SFA) database to your Desktop or Laptop PC during the Send To Scanner process. **Note**: If you have multiple Barcode Scanners supporting your Physical Inventory; transfer the data to the first Scanner with the Download checkbox enabled (checked), which loads the reference files onto your PC, then after the transfer to the Scanner is complete: • Uncheck the Download checkbox, leaving the Copy to Scanner checkbox checked. • Place another Barcode Scanner in the Cradle, create a partnership, and click the Send to Scanner button. • Repeat as required for each additional Barcode Scanner. This feature allows you to transfer the same data to multiple Scanners quicker and easier.
Copy to Scanner	**Defaults**. Used to transfer data from your PC to your Barcode Scanner during the Send To Scanner process.
Include All Catalogs	Check **only** if you wish to transfer **ALL** SFA Catalog (Manufacturer, Model, and Official Name) data to the Barcode Scanner. **Note**: The Catalog data needed to support your current asset base is automatically transferred.
Include All People	Check **only** if you wish to transfer **ALL** SFA People data (from the People Records in the Admin module) to the Barcode Scanner. **Note**: The People Record data needed to support your current asset base is automatically transferred.
Include All Managers	Check **only** if you wish to transfer **ALL** SFA Manager data (from the Organization table maintained in the Admin module) to the Barcode Scanner. **Note**: The Manager data needed to support your current asset base is automatically transferred.
Include All Stewards	Check **only** if you wish to transfer **ALL** SFA Steward data (from the Organization table maintained in the Admin module) to the Barcode Scanner. **Note**: The Steward data needed to support your current asset base is automatically transferred.

Selecting the Interest Asset Type

Selecting an interest Asset Type will tell Sunflower Assets from which Module or “Interest” the assets are going to be scanned. Essentially, the interest asset type is an umbrella under which a group of assets are housed such as all Inventory assets or all Excess assets.

New with MobileTrak Release 4.6 you may send and scan multiple asset types (modules) at a time.

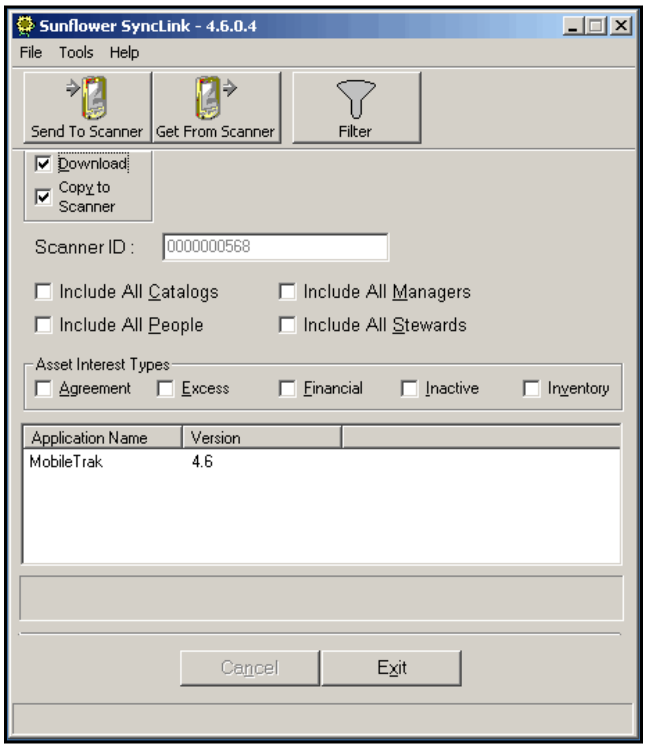


Figure 2-4: Interest Asset Types. Selecting an asset type identifies the interest assets that will be retrieved from the Sunflower Assets database and downloaded to the barcode scanner.

Use the steps on the next two pages to setup SyncLink.

Step 1 Launch SyncLink by double-clicking SynkLink.exe or the SyncLink icon on your PC.

Step 2 Enter your Sunflower Assets Username and Password, and then click the **Login** button.

Step 3 Accept the default settings for the **Download** and **Copy to Scanner** checkboxes; at least for the first Barcode Scanner. Then if desired, uncheck the **Download** checkbox.

Step 4 Select the desired “Include” checkbox(es) per your Business Policy.

Step 5 Select the Asset Type(s) for which you are conducting the inventory (i.e. **Inventory**).

Step 6 Select **MobileTrak** from the list of applications by clicking on the name to highlight it.

NAVIGATION

- Select the appropriate checkboxes
- Select the asset type(s)
- Select the **MobileTrak** application name
- Optionally click the **Filter** button
- Click the **Send To Scanner** button

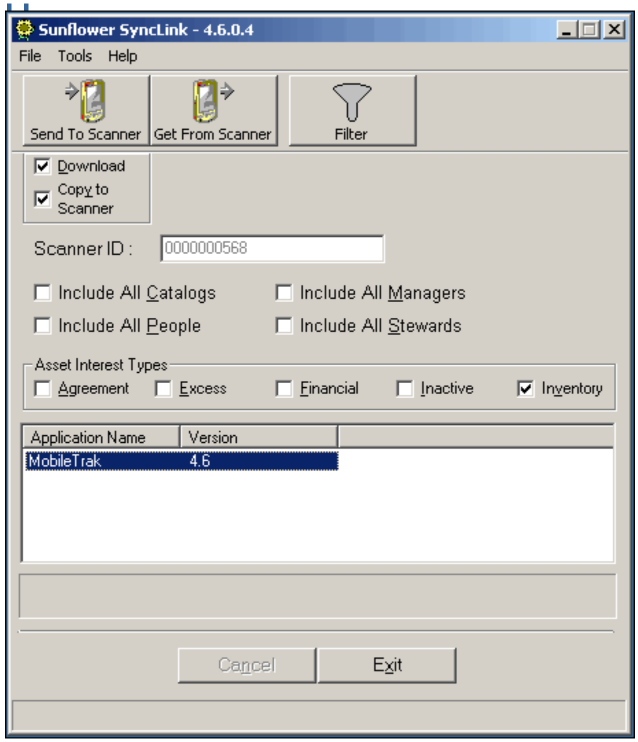


Figure 2-5: Application Name. Selecting an application identifies to SyncLink the mobile computing tool you wish to use, whether it is MobileTrak™, PackTrak™, or ExcessTrak™. In the figure above only one application has been installed, if there were other mobile applications installed they would be visible here.

The next page discusses the optional filtering that is available in Synclink.

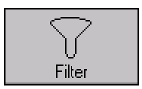
FILTERING ASSET DATA (OPTIONAL)

The last step in completing the configuration of MobileTrak for a review campaign involves applying any special filters to the asset data in accordance with your organization's business processes. *As this is an optional step*, it is not required to ensure the success of your barcode scanning operations.

Using a filter serves to narrow the assets you expect to find during a physical inventory to a particular site, steward, manager, agreement, campaign, or any combination of these filter selections. You may select more than one entry from each tab.

NAVIGATION

- Click the **Filter** button



- Select a tab(s) containing the filter(s) to be applied
- Select the appropriate data
- Click the **Apply** button
- Click the **OK** button

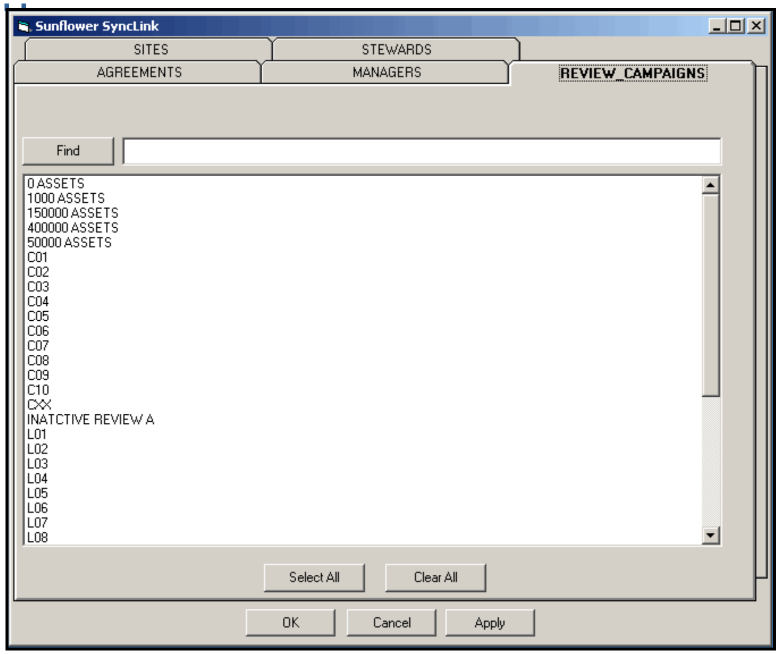


Figure 2-6: Filters can be applied for specific Sites, Agreements, Review Campaigns, and/or Stewards

Note: If filtering is selected the **Filter** button will be activated, changing from **Gray** to **Blue**.

Step 3 Click the **Send To Scanner** button to transfer reference and asset files to your PC and on to the barcode scanner.

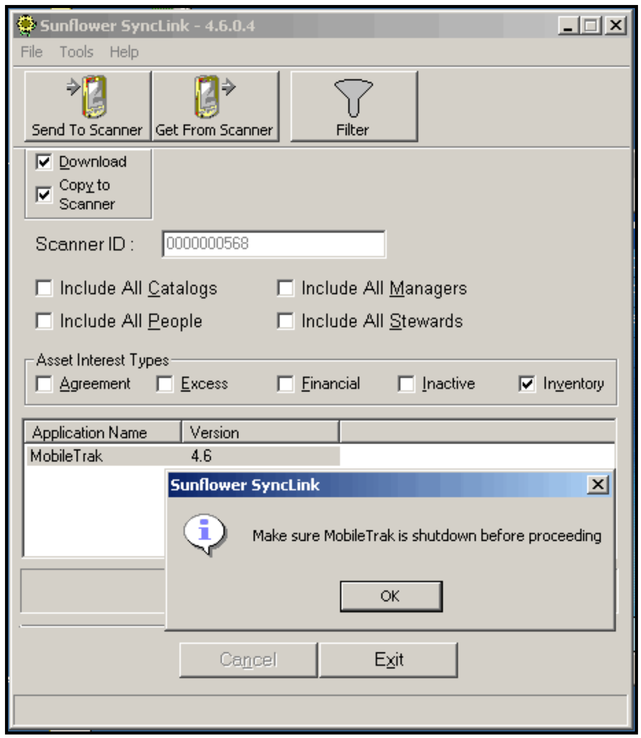


Figure 2-7: Download to the PC and Copy to the Barcode Scanner pop-up window.

A pop-up window displays, shown above, reminding you to shutdown MobileTrak before transferring the data from the Sunflower Assets database.

Step 4 Click the **OK** button on the pop-up window, which will start the transfer process.

Step 5 A Download and Copy Complete pop-up window displays, as shown below, which means that the Download to the PC and the Copy to the Scanner are both complete.

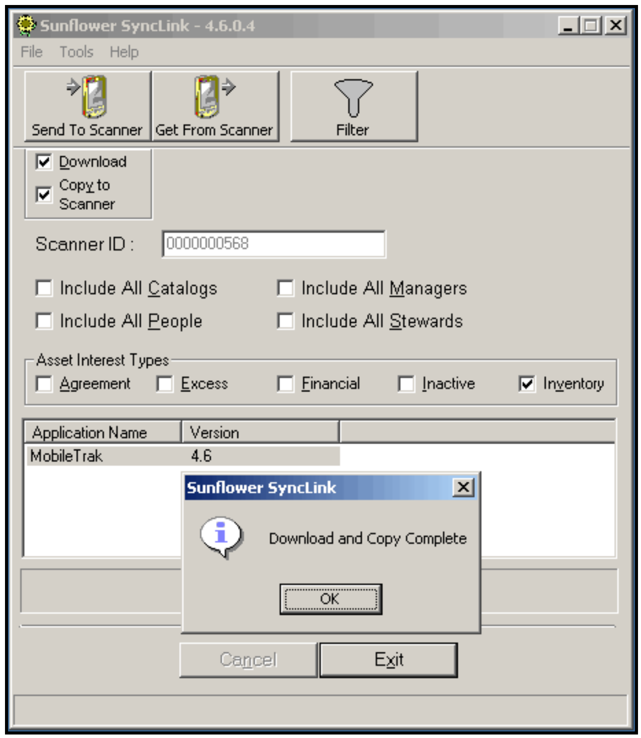


Figure 2-8: Download to the PC and Copy to the Barcode Scanner pop-up window.

Step 6 Click the **OK** button on the pop-up window.

Note: You have the option to place additional Barcode Scanners into the cradle, create another Guest Partnership, uncheck the **Download** checkbox, and click the **Send To Scanner** button. You may copy the data to as many Barcode Scanners as required.

TRANSFERRING AND THE DATABASE REFRESH PROCESSES

TRANSFER (DOWNLOAD) DATA FROM THE DATABASE TO THE BARCODE SCANNER

The transfer of data between your Sunflower Assets database and MobileTrak involves a number of interactions between the various components of the barcode solution. The following diagram outlines the main components and the interactions between them.

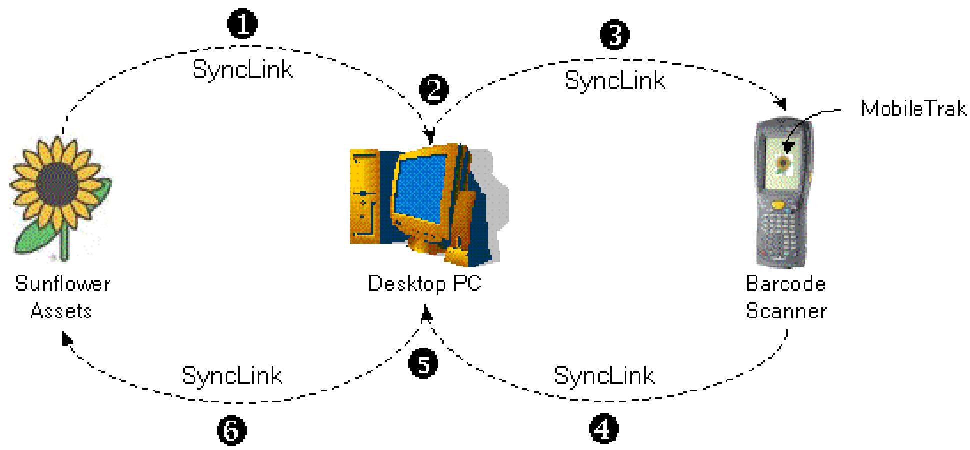


Figure 2-9: Transfer process

You may also interact with MobileTrak using HTML pages. The scanner must be docked in the cradle and the cradle connected to your computer. At a high level, the following automated steps are executed to download asset data from the database to the barcode scanner when you click the Send to Scanner button. The Send To Scanner process involves a number of interactions between the various components of the barcode solution. These interactions include copying reference files from the Sunflower Application to the PC, then copying the files from the PC to the scanner.

Step 1 Transfer data from the server for the lookups and reference files to the PC.

Step 2 SyncLink stores the data from the SFA database on the PC.

Step 3 Copy the new reference files, collectively known as the reference database, to the barcode scanner. To avoid any conflicts, SyncLink first removes the existing reference database from the barcode scanner (Number 3).

DOWNLOAD TIME-OUTS

SyncLink waits for each file to be downloaded before sending the files to your barcode scanner. SyncLink is capable of detecting when all of the files have been successfully downloaded and automatically resumes operation. Although SyncLink strives to ensure downloads happen as expected, it cannot anticipate some exceptional situations. For example, if you cancel the download of a file or change the default Save-to location, SyncLink will not be able to find the downloaded file.

When confronted with a situation similar to this, SyncLink waits a specified period before prompting you to restart the wait period or cancel the process. The default value for the time out is 30 seconds, but can be changed to a longer period if necessary. If you receive this notification and you have not yet finished acknowledging the download dialog boxes, clicking “Yes” will instruct SyncLink to continue waiting. If you have acknowledged all the file download dialog boxes, the notification indicates that at least one download has failed. You must repeat the entire download process to ensure that all of the files have been downloaded and transmitted to your barcode scanner.

TRANSFER (UPLOAD) DATA FROM THE BARCODE SCANNER TO THE DATABASE

Step 4 The Get From Scanner button is used to copy the MobileTrak output data file from the barcode scanner to your PC (Number 4). You will need to ensure the MobileTrak application is not in use prior to performing the upload.

Step 5 SyncLink assembles the data for delivery to the SFA database.

Step 6 Upload the data to the application server and invoke server side components that will insert the updated records into your Sunflower Assets database (Number 6).

Upon completion of the configuration steps, you are ready to begin using MobileTrak.

LAUNCH MOBILETRAK

This section will discuss how to launch and setup MobileTrak. Of note, there are a wide number of barcode scanners available, however, the process of using MobileTrak release 4.6 is the same regardless of the scanner in use.

Step 1 Tap, using the “Stylus” provided, Start on the barcode scanner touch screen.

Step 2 If available, Tap the MobileTrak icon located just below the **Start** menu.

Alternatively, you can Tap **Start** > **Programs** > **MobileTrak**.

NAVIGATION

- Tap **Start**
- Tap the **MobileTrak** icon

Figure 2-10: Launch MobileTrak using the Start menu on the barcode scanner

Tips: If, when starting MobileTrak, you receive an error message, then you do not have the required lookup files loaded on your barcode scanner.

Run the SyncLink procedure described previously. If the MobileTrak main menu displays then you have successfully loaded and initialized the barcode scanner with your lookup files.

MOBILETRAK PROGRESS BAR

After launching MobileTrak, a Progress Bar automatically displays, as shown below.

NAVIGATION

- Tap **Start**
- Tap the **MobileTrak** icon

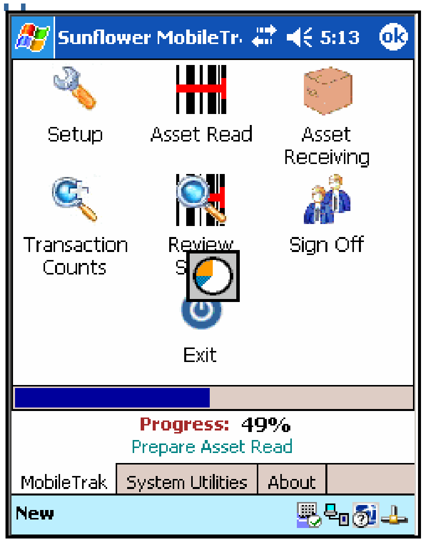


Figure 2-11: MobileTrak Progress Bar

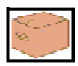
You must wait until the Progress Bar action is complete before proceeding any further.

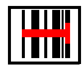
Once the Progress bar action is complete, the MobileTrak main menu displays icons, which replaced the lists of menu actions available in previous versions, representing various functions and new terminology.

MOBILETRAK ICONS

A new feature of MobileTrak v4.6 is the improved ease of use and navigation made possible through icons. The icons replace the lists of menu actions available in previous versions of the application. Additionally, the icons represent new terminology as represented in the table below.

MobileTrak icons:

Setup	
Asset Receiving	
Review Scans	
Exit	

	Asset Read
	Transaction Counts
	Sign Off

System Utilities icons:

Battery Status	
Thermal Info	
Memory Status	

	Test Scanner
	Set Clock

Figure 2-12: MobileTrak icons

MOBILETRAK SYSTEM UTILITIES

MobileTrak has a number of features available through its System Utilities to assist you in the management of the application with common tasks such as setting the clock on your barcode scanner, setting alarms, checking the battery status, and testing the scanner. The following system utilities are available in the MobileTrak application:

- Battery Status
- Test Scanner
- Terminal Info
- Set Clock
- Memory Status

All of the features listed above are available on the System Utilities tab of the MobileTrak application, as shown below.

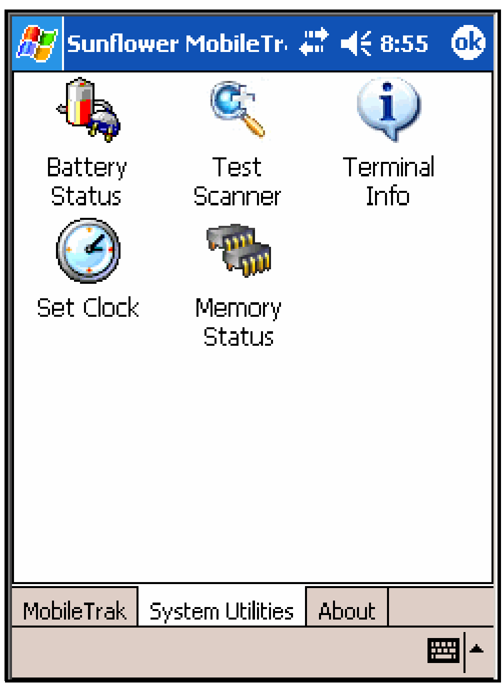


Figure 2-13: System Utilities tab

Battery Status

The Battery Status feature is used to monitor and manage usage of the scanner's battery, configure battery runtime, and setup and/or disable low battery notifications. It is important to monitor battery setup and usage so that data will not be lost in the event the scanner is operated in a low battery condition.

BATTERY POWER

The Power tab is used to monitor the charging status of the main and backup batteries. Additionally, this tab is used to set parameters on the time limits for keeping the device powered when not in use, whether it is used on battery or external power.

Navigation

- Tap the **System Utilities** tab
- Tap **Battery Status**

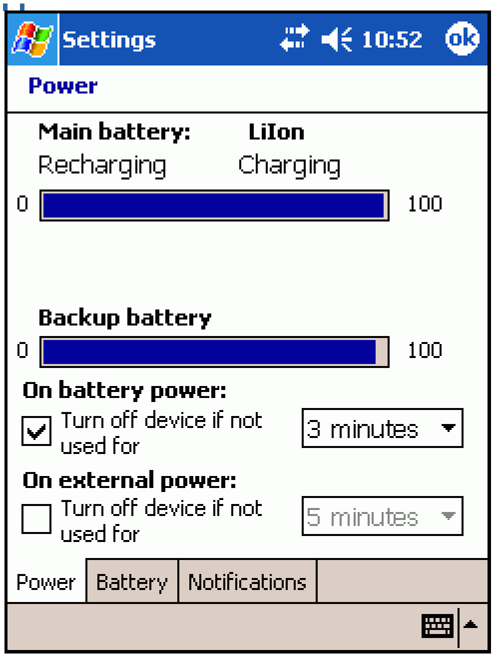


Figure 2-14: Battery Status. Power Settings

BATTERY RUNTIME

The Battery tab is used to configure the application's use of the battery runtime. If you choose to increase the battery runtime, however, it will decrease RAM retention time and/or performance.

NAVIGATION

- Tap the **System Utilities** tab
- Tap **Battery Status**
- Tap the **Battery** tab

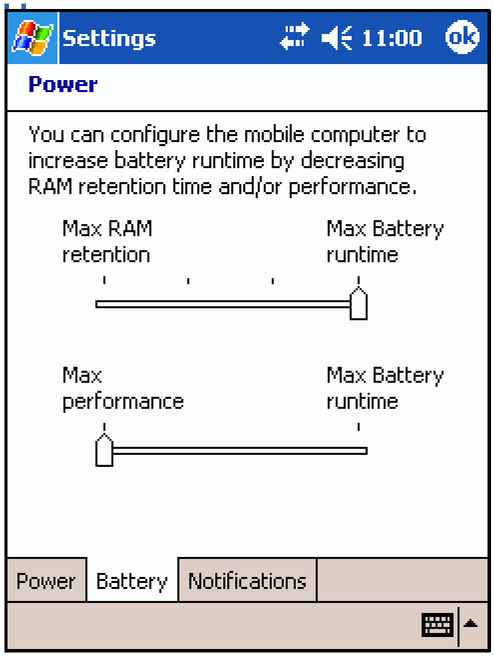


Figure 2-15: Battery Status. Battery Runtime

BATTERY NOTIFICATIONS

The Notifications tab is used to disable low battery notifications on the application. The application is setup by default to provide you with two warnings.

1. The first warning occurs when the main battery is running low.
2. The second warning is more serious and will appear when the main battery is running very low.

You can choose to disable these notifications, however, this is not recommended because you will receive no warning if the scanner is operating in a low battery condition and data could be lost.

NAVIGATION

- Tap the **System Utilities** tab
- Tap **Battery Status**
- Tap the **Notifications** tab

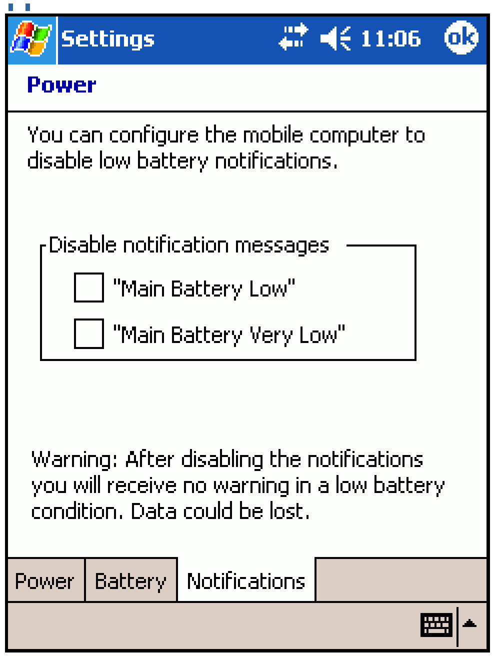


Figure 2-16: Battery Status. Battery Notifications

TEST SCANNER

The Test Scanner feature can be used to test the scanner prior to scanning actual barcodes or RFID tags during a physical inventory. If you believe the scanner is not operating properly, this feature provides a way for you check the application's asset read feature without recording scans against a physical inventory.

NAVIGATION

- Tap the **System Utilities** tab
- Tap **Test Scanner**
- Scan a barcode or RFID tag to test the scanner

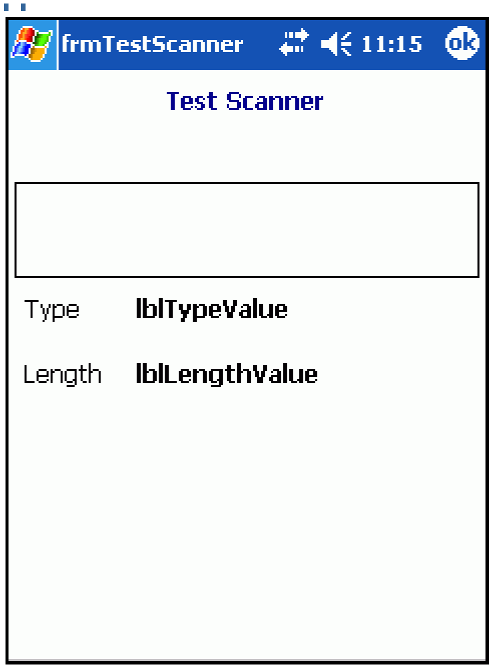
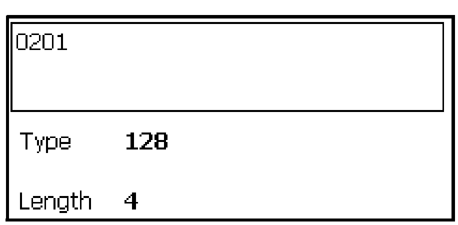


Figure 2-17: Test Scanner

When you scan an asset's barcode or RFID tag, the information will appear in the blank box to confirm the tag has been successfully scanned, as shown below.



TERMINAL INFO

The Terminal Info feature is an information-only screen that contains data about the Terminal ID of the scanner being used and the type of connection being used for communication with ActiveSync. Recall that ActiveSync enables communication between SyncLink and MobileTrak for successful data transfer between the files in your database and the MobileTrak application.

NAVIGATION

- Tap the **System Utilities** tab
- Tap **Terminal Info**

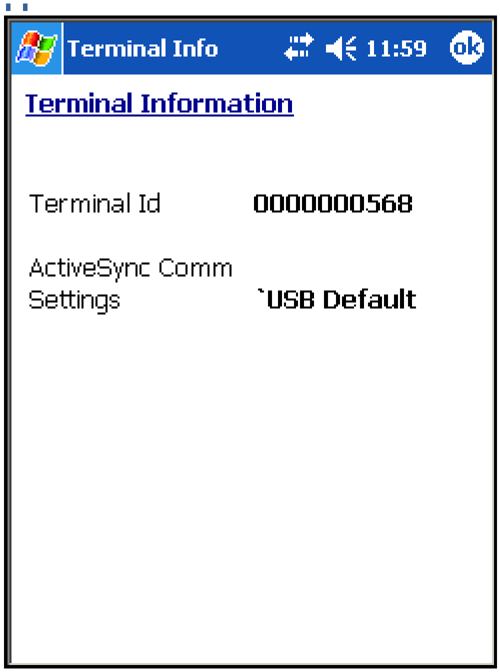


Figure 2-18: Terminal Information

Set Clock

The Set Clock feature assists you in setting the time zone the application will use when recording time and date-sensitive information on asset scans. This feature also has the capability to allow the user to set four different alarms as reminders to take action on a specific task, which could be valuable during a physical inventory with time-sensitive requirements.

TIME TAB

The Time tab is used to set the Home clock, which is the clock used on the actual scanner. In the event you are conducting multiple physical inventories in other locations, a Visiting clock can also be set to help you track the date and time in another location. Use the drop down menus on the Time tab to set or change the time zone, time, and date.

Navigation

- Tap the **System Utilities** tab
- Tap **Set Clock**

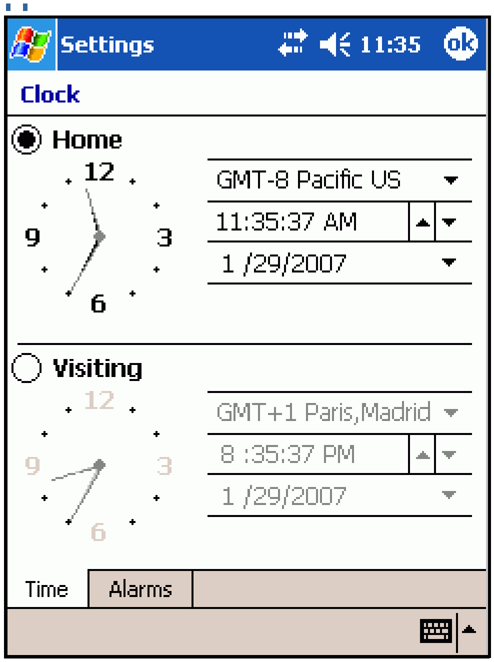


Figure 2-19: Set Clock. Time Tab

ALARMS TAB

The Alarms tab can be used to set up to four different alarms. When an alarm is sounded, you have the option to dismiss it or snooze for a specified time using a drop down list of choices in minutes. You can also configure the alarm(s) to play a choice of sounds, and disable or enable the default message, flashing light, or vibration.

NAVIGATION

- Tap the **System Utilities** tab
- Tap **Set Clock**
- Tap the **Alarms** tab

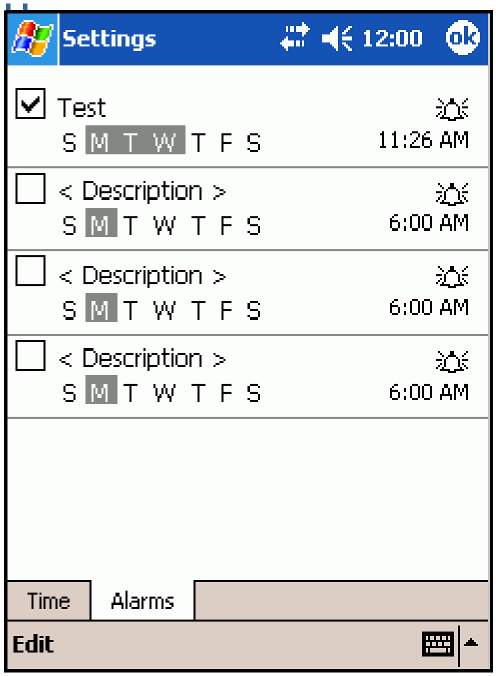


Figure 2-20: Set Clock. Alarms Tab

Tap the icon to set and/or adjust the alarm sound, message, flashing light, and vibration.

Tap the time display 11:26 AM to set the time of the alarm.

Tap the < Description > field and use the pop up keyboard to enter a name for the alarm.

Tap on a day of the week to set the day the alarm should appear S M T W T F S . You can set the alarm to go off on multiple days if desired; simply tap the appropriate day(s) of the week.

When you have set the desired alarms, you can choose to enable or disable the alarms by selecting or deselecting the checkbox next to the appropriate alarm(s).

MEMORY STATUS

The Memory Status feature is used to temporarily adjust the allocation of storage and program memory on the barcode scanner. Memory is managed automatically with MobileTrak, however, this feature can be used to make adjustments as needed.

MAIN TAB

The Main tab is used to adjust how storage and program memory are allocated to support the application. Move the slider to make adjustments to the application memory allocations.

NAVIGATION

- Tap the **System Utilities** tab
- Tap **Memory Status**
- Adjust memory allocation using the slider
- Click **OK** to save

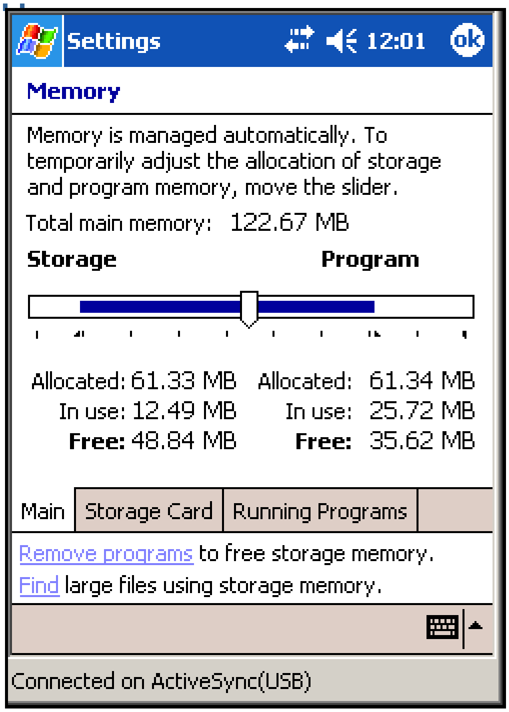


Figure 2-21: Memory Status. Main tab

STORAGE CARD TAB

The Storage Card tab is used to display the ratio of in use memory to free memory. Use the drop down menu below the memory bar to switch between ratios for Flash File Store and SDMMC Disk store.

NAVIGATION

- Tap the **System Utilities** tab
- Tap **Memory Status**
- Tap the **Storage Card** tab

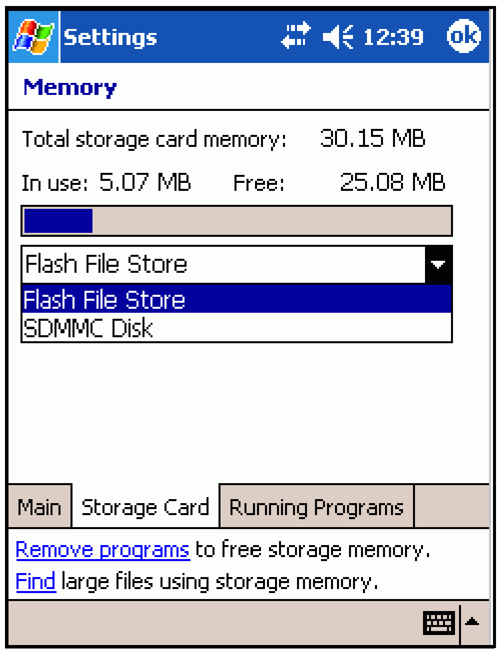


Figure 2-22: Memory Status. Storage Card Tab

This is an information-only screen, therefore no data entry is required.

RUNNING PROGRAMS

The Running Programs tab displays the programs available on the scanner. It is similar to the Windows Task Manager on your PC. You can activate or stop a program from running by highlighting it in the Running Program List and choosing the Activate or Stop buttons, respectively.

NAVIGATION

- Tap the **System Utilities** tab
- Tap **Memory Status**
- Tap the **Running Programs** tab

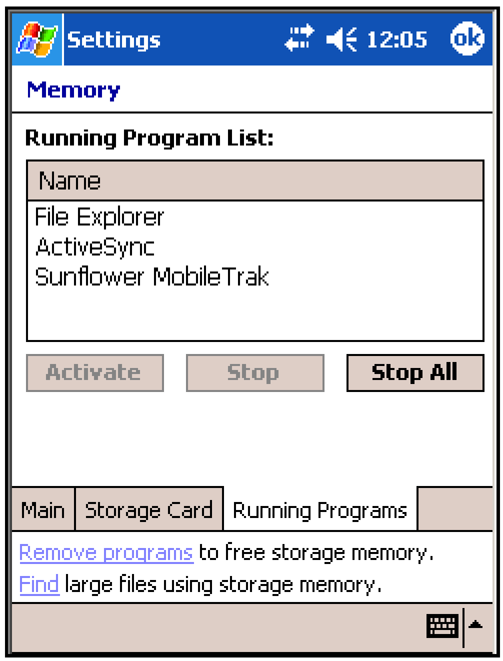


Figure 2-23: Memory Status. Running Programs Tab

Note: The Remove programs link is discussed on the next page.

REMOVE PROGRAMS

Use the Remove programs link to free storage memory by eliminating listed programs from the scanner's available memory.

NAVIGATION

- Tap the **System Utilities** tab
- Tap **Memory Status**
- Tap the **Remove Programs** link

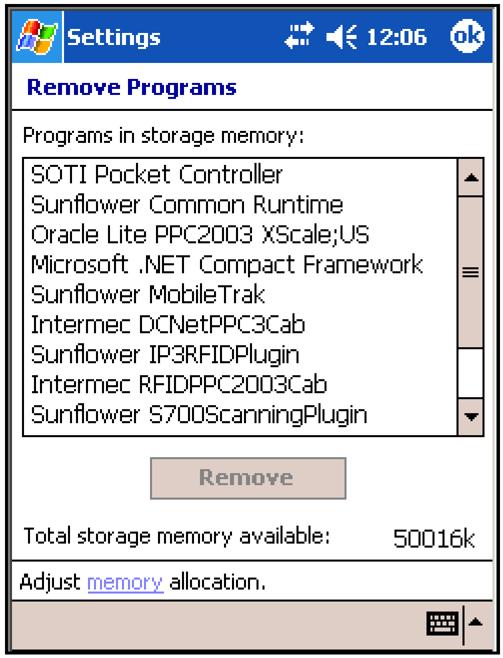


Figure 2-24: Remove Programs feature

Highlight an application in the **Remove Programs** list and click the Remove button to eliminate the application from the scanner's storage memory.

TERMINATE A MOBILETRAK SESSION

When you want to terminate a MobileTrak session, you can do so in two different ways, depending on how you have configured Sunflower Enterprise to authenticate MobileTrak users. The two options that are available include:

- Sign Off
- Exit

SIGN OFF MOBILETRAK

The Sign Off feature in MobileTrak is used to indicate a particular user is no longer the Operator of the barcode scanner. Sign Off is only an active feature if the FORCEAUTH parameter is set to **Yes** in the Administration module of your Sunflower Enterprise database. When FORCEAUTH = Yes the person who logs into SyncLink will be the Operator in MobileTrak and you cannot change the Operator ID. When you click the Sign Off icon, a prompt will inform you that signing off will require you to reauthenticate with SyncLink. If you want to terminate the MobileTrak session, select **Yes**. Select **No** to return to the main menu.

NAVIGATION

- Tap the **Sign Off** icon on the main menu
- Select **Yes** or **No** as appropriate

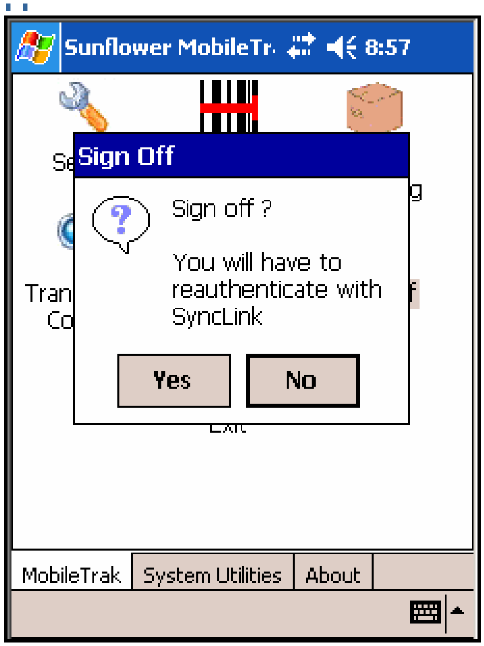


Figure 2-25: Sign Off MobileTrak

EXIT MOBILETRAK

The Exit feature does not require reauthentication in SyncLink. When you click the Exit icon on the main menu in MobileTrak, you are effectively telling the database there is no change in the operator of the barcode scanner, but you wish to terminate the session. This contrasts with Sign Off, which is used to terminate the session of a specific user.

NAVIGATION

- Tap the **Exit** icon on the main menu
- Select **Yes** or **No** as necessary

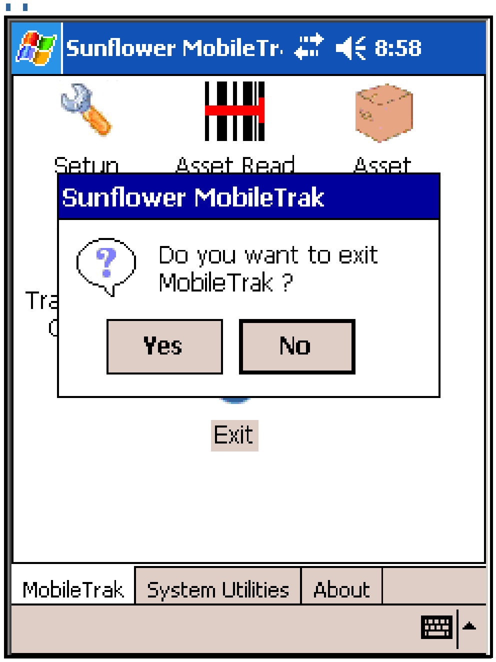


Figure 2-26: Exit MobileTrak

3

Manage Asset Reads

Performing a physical inventory using a barcode scanner is accomplished in several quick and easy steps that begin with using MobileTrak™ for the creation and definition of the scanning process. The barcode scanning process using MobileTrak entails the synching of data between your Sunflower Assets® database and your barcode scanner. MobileTrak will scan your assets and record resolutions which are then uploaded to Sunflower Assets. This chapter will discuss the process of performing a physical inventory using a barcode scanner with MobileTrak installed.

This chapter will include the following discussion points and concepts:

- Asset Read Overview
- About Asset Read Setup
- Record Asset Reads
- Perform Asset Receiving
- Review Transaction Counts
- Review Scans

ASSET READ OVERVIEW

Sunflower Assets, in conjunction with MobileTrak, provides mobility in the tracking and management of your assets from acquisition through final disposal. An asset will likely be audited through a series of physical inventories before it is disposed. Assets tracked through a physical inventory will go through the following stages in Sunflower Assets and MobileTrak.

Physical Inventory Lifecycle	Sunflower Assets	MobileTrak
1. Define assets in a campaign (baseline)	X	
2. Freeze baseline	X	
3. Define parameters for an asset find (resolutions)	X	
4. Perform asset reads (resolutions)	X	X
5. Review asset reads	X	X

Figure 3-1: The chart above identifies the actions related to physical inventories that are performed in Sunflower Assets, MobileTrak, or both.

Users that are a part of the physical inventory process can create resolutions for assets manually by entering the information through a Sunflower Assets form, through the use of Sunflower Assets' HTML Transaction web pages, or by using a barcode scanner to record asset reads.

Performing asset reads, also referred to as recording resolutions, is the process of using a barcode scanner to collect data about the assets in your physical inventory. The barcode scanner simplifies the scanning of assets for inventories and allows you to:

- Add, edit or delete asset scans
- Add assets found during a scan
- Review previously recorded scans

About Asset Read Setup

This section illustrates how to setup asset reads using the MobileTrak screens. Before you can begin scanning and recording (asset reads), you must first provide the application with the following basic information:

- Operator for the barcode scanner
- Structure Level 1 Type
- Structure Level 2 Type

The Asset Read Setup screen is used to specify background information related to the assets that will be scanned. The drop down menu values must be loaded onto the barcode scanner the first time you use MobileTrak and may be refreshed periodically to provide new values that are added in Sunflower Enterprise. The elements displayed below are updated any time there is a new Structure Level Type or Operator added to the Sunflower Enterprise database. The update will occur each time files are sent to the scanner. Once values are loaded from the reference database, you will be able to define the setup menu by selecting values from the drop down list or entering valid values for each field.

Navigation

- Tap the **Start** icon
- Tap **MobileTrak**
- Tap the **Setup** icon

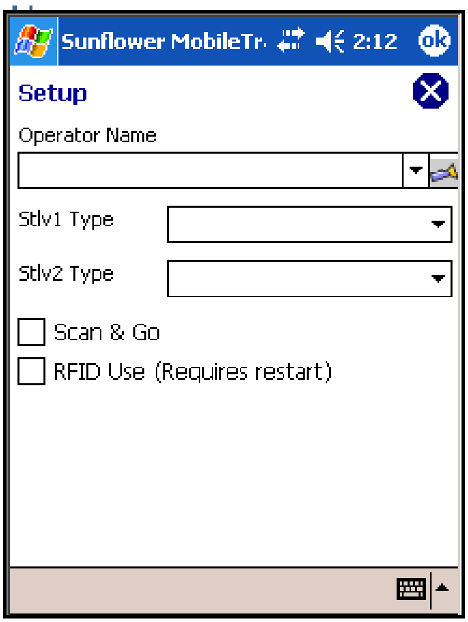


Figure 3-2: Asset Read Setup screen.

OPERATOR NAME

The Operator Name field contains unique alphanumeric user code defined by your organization and name data that represents the user performing the scanning activity. This field may autopopulate based on a parameter set in Sunflower Assets. If it does autopopulate, it is set to the person that logged in with SyncLink.

To change the user, you must:

- Have the new user log in to SyncLink and do a Send To Scanner, or
- Select the new user from the LOV, which is populated from the Maintain Operators form in the Sunflower Assets Admin module.

The Operator Name is a **required** field used to setup the resolution.

If the Operator Name field is blank, use one of the following data entry methods to display the name (or populate a list of values (LOV) that you may then select the name from):

1. Operator Identifier (usually the Employee Number or Badge Number) + **Find**
2. One comma (,) followed immediately (no spaces) by the Last Name + **Find**
   (For example: ,smith)
3. Two commas (,,) followed immediately (no spaces) by the First Name + **Find**
   (For example: ,,alice)

Note: You must Tap the **Find** icon to initiate the search. If you are using an Intermec scanner, the **Action** key works the same as the **Find** icon.

Based upon your search criteria, Sunflower will either populate the Operator Name field or provide a LOV. If there are greater than 5,000 operators Sunflower will populate only the first 5,000 returns for you to select from in either ID order, Last Name order, or First Name order depending on whether you used commas to enter a last name or first name prior to Tapping the **Find** key.

There are also audio tones incorporated into MobileTrak, which provide an indication of whether the data is found or not found.

STRUCTURE LEVEL TYPES

Structure Level Types are used to provide flexibility when describing structures and parts of structures.

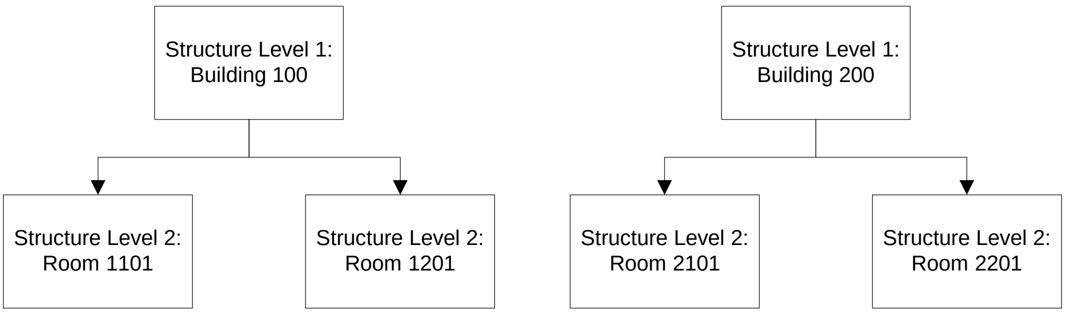


Figure 3-3: Structure Level Types

Structure Level 1 and 2 Types:

Structure Level 1 (Stlv1) Type identifies higher level structures (i.e. buildings, warehouses, containers, ships, etc.). The structures are defined in the Sunflower Enterprise Administration module and the reference data is included in the files sent to MobileTrak. Select from the LOV.

Structure Level 2 (Stlv2)Type identifies a substructure such as a floor, room, wing, or drawer in which assets may be stored. This Structure Level Type provides a second level of detail for the storage location of your asset and is also included in the files sent to MobileTrak. Select from the LOV.

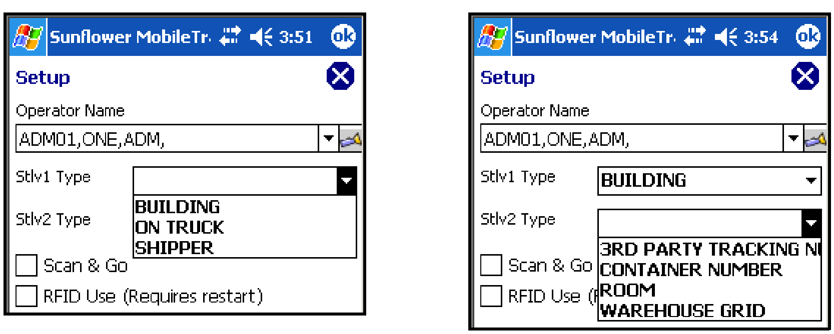


Figure 3-4: Structure Level 1 and Structure Level 2 Types

NOTE: These are **required** fields. You will enter the actual value of the structure (i.e. BUILDING 100 ROOM 1101) in the next menu items.

SCAN & GO

The Scan & Go feature allows you to perform continuous scanning (asset read) activity where you prefer not to view the details of each scanned asset.

Note: If you select (check) the Scan & Go checkbox the scanner will not display asset details and the Update or Add features on the Asset Reads screen will not be available.

Note: If, in SyncLink, you selected multiple Interest Types (i.e. Inventory Management and Agreements), have two different assets with the same Barcode Identifier, and the asset you scan has one of those barcodes, then the Barcode Scanner will automatically drop the Interest Identifier (i.e. INV or AGR). When you open SyncLink and perform the Get From Scanner process the following will occur:

- The resolution will go to the Auxiliary Load Resolutions Table, which is not accessible from Sunflower Assets.
- When you run the Resolution Interface Processing Report, an error will display.
- Notify your Sunflower Assets DBA, who can then relocate this error into your Review Resolutions Interface table for your resolution.

RFID USE

MobileTrak, in conjunction with Sunflower Enterprise, is capable of supporting physical inventory efforts for assets utilizing Radio Frequency Identification (RFID). Sunflower MobileTrak can accommodate simultaneous multi-tag RFID scanning, thereby making it possible to scan more than one asset in a given location with one push of the scanner button.

If your organization utilizes RFID technology for its assets, selecting the RFID checkbox will initialize the devices required to enable MobileTrak to read RFID scans. When MobileTrak is started the first time, the RFID checkbox will default to the deselected (unchecked) state.

Note: If you will be using RFID, then you must check the RFID checkbox and restart MobileTrak. When MobileTrak is restarted, the checkbox will be checked.

ASSET READ SETUP

When the required fields have been completed, you are ready to begin collecting asset data with the barcode scanner.

Tips: Taping the ok button in the upper right-hand corner of the screen will save the entries to the scanner. If you need to exit the screen without saving, Tap the “X” just below the ok button.

NAVIGATION

- Tap **Start** icon
- Tap **MobileTrak**
- Tap **Setup**
- If empty, enter a valid name in the **Operator Name** field
- Select a **Structure Level 1 Type**
- Select a **Structure Level 2 Type**
- Optionally check Scan & Go
- Optionally check RFID Use
- Tap **OK** to save

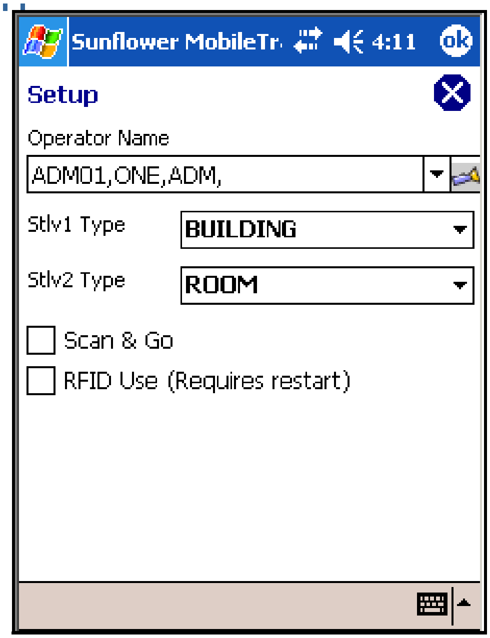


Figure 3-5: Perform asset reads setup.

FIELD NAME	DESCRIPTION/EXPLANATION
Operator Name	Enter or select from the list of values if your user name does not auto-populate.
Structure Level 1 Type	**Structure Level 1Types** defines structures such as buildings, warehouse, or containers. Essentially any structure that may contain one or more rooms, compartments, or bins in which items may be stored. This is a **required** field.
Structure Level 2 Type	**Structure Level 2 Type** defines a substructure such as room or wing within a **Structure Level 1 Type** in which assets may be stored. This type provides a lower level of specification in the storage location of your asset. This is a **required** field.
Scan & Go	Optional. Only select if you do not wish to view scanned asset details.
RFID Use	Optional. Only select if your organization utilizes RFID technology for its assets. Restart is required.

RECORD ASSET READS

Once you have defined the Asset Read Setup screen on the scanner, you can begin recording asset reads (resolutions). The process of recording asset reads is a simple and easily executed process that uses a barcode scanner to collect data on assets that are a part of your physical inventory.

Tap the Asset Read icon. Specify your current location. Each resolution you record is captured using the current location that you establish on this screen. As you move from location to location, return to this screen to update the barcode scanner's location.

Recording Asset Reads involves the following steps:

Step 1 **Select the Asset Read Type:** Specify one of the two options available:

- Asset Read Only
- Asset Read with Updated Location

Step 2 **Define Location:** Specify the current location for the scanning activity and Tap the **Next** button.

Step 3 **Record the Asset Read:** Scan the 1D, 2D, or RFID asset tags (or enter manually).

Step 4 **Review the Scan:** Apply changes to asset reads as needed by either Tapping the **Update** button or the **New** button.

The steps above are accessed through the main menu using the Asset Read icon.

The following pages will discuss and illustrate how to perform the steps listed above.

Select the Asset Read Type

To record an asset read using the scanner you are required to define the type of asset read you plan to perform. Two options are available:

- Asset Read Only
- Asset Read with Updated Location

The selected mode is indicated by the drop-down list located at the top of the Asset Read screen just below the Sunflower MobileTrak menu bar.

Navigation

- Tap **Start** icon
- Tap **MobileTrak**
- Tap **Asset Read**
- Select an asset read type from the drop down menu

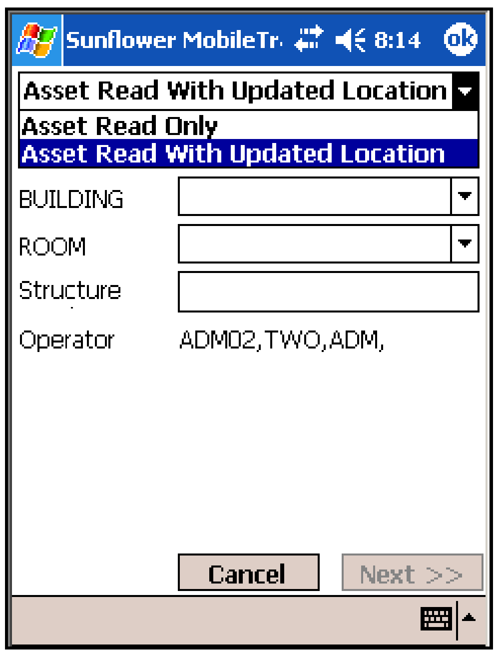


Figure 3-6: Asset Read selections

Tap the **Cancel** button to return to the MobileTrak main menu.

Note: The **Next** button will activate after you have entered the appropriate Location information. **Site** level is the minimum required location entry.

ASSET READ ONLY

Use the Asset Read Only option to record asset reads without changing location information. Selecting this option will allow you to record that you scanned the asset against the current asset location definition from the Sunflower Assets database. This option will not update the asset's location in Sunflower Assets since the location has not changed.

Step 1 Tap the **Asset Read** icon from the MobileTrak main menu.

Step 2 Select Asset Read Only as the asset read type from the drop down list. Selecting this option indicates that you are *not* updating the asset's location with new location information.

ASSET READ WITH UPDATED LOCATION

Use the Asset Read with Updated Location option to specify *new* location information for assets you plan to scan. Selecting this option will update the asset's location in Sunflower Assets if the scanned location is different from the asset's location as reflected in your Sunflower Assets database.

The login of the person uploading the asset reads through Synclink has to be authorized to update assets' locations. This authorization is performed in the Administration module of Sunflower Enterprise as part of the setup for user roles. If the person is not authorized to update location data, the Resolution information is still processed in the Review module; however, the location will not be updated.

Step 1 Tap the **Asset Read** icon from the MobileTrak main menu.

Step 2 Select Asset Read with Updated Location as the asset read type from the drop down list. Selecting this option indicates you are or are intending on updating an asset's location with new location information.

DEFINE LOCATION

After selecting an Asset Read Type, you will need to specify your current location for the scanning activity. Each asset read you record is captured at the location you have entered on this screen. As you move from location to location you will need to return to update the location information on this screen, which is the same screen used to select an Asset Read Type.

NAVIGATION

- Tap **Start** icon
- Tap **MobileTrak**
- Tap **Asset Read**
- Select the appropriate location data from the drop down menu

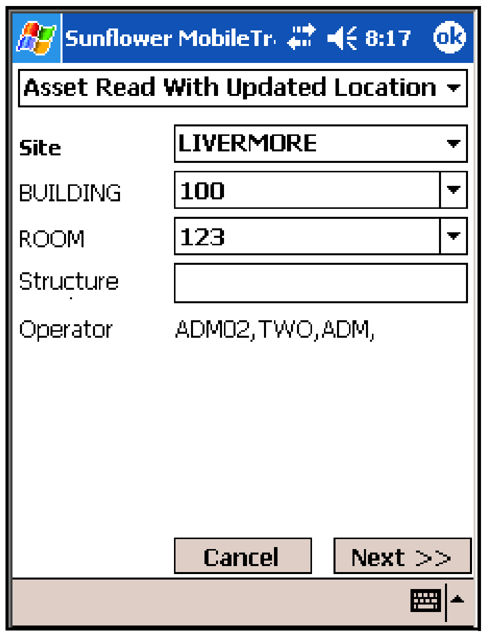


Figure 3-7: Define Location. Specify a current location for the scanning activity

Values available for selection from drop down lists are populated by the reference files transferred to the scanner from Sunflower Assets. If you do not see valid values in the drop down lists, then it may be necessary for you to do a Send To Scanner in SyncLink.

A Site must be selected from the Site LOV; however, if a Building and/or Room is not available in the LOV, you may type in the correct value.

Note: Once you enter the appropriate data and Tap the **Next** button you must return to this screen in order to exit the Asset Read function and return to the main menu.

The steps on the next page describe how to define a location for an asset read.

The Define Location screen consists of the following field parameters and actions:

Parameter	Definition	Example
Site	The asset's site.	San Francisco, Palo Alto, Livermore
BUILDING (Structure Level 1)	The main structure of the asset. **Note**: The parameter name is dynamic and is based on the value selected for Structure Level 1 Type on the Setup screen. Automatically clears if a new Site is selected.	100, Administration, Wing A, Parking Lot 15A
ROOM (Structure Level 2)	The substructure of the asset. **Note**: The parameter name is dynamic and is based on the value selected for Structure Level 2 Type on the Setup screen. Automatically clears if a new Building is selected.	123, Property Office
Struct Level 3	Optional. The specific section of the substructure defined by Structure Level 2 of the asset is located.	Container, Safe, Bin
Operator	Name of the person performing the scanning. **Note**: Can only be changed on the Setup screen.	ADM01,ONE,ADM or 1234,DOE,JOHN

Figure 3-8: Define Location fields

Step 1 Select Asset Read with Updated Location or Asset Read Only as the asset read type from the drop down list to indicate whether your are updating the asset's location or not when capturing asset resolutions.

Step 2 Use the drop down list to select the Site.

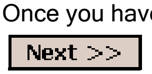
Step 3 Enter the asset's **Building** (Structure Level 1).

Step 4 Enter the asset's **Room** (Structure Level 2).

Step 5 Optionally, enter the asset's Structure Level 3 (e.g. Container, bin, etc.).

Note: The Operator name field is display only. To change this value, tap **ok** or **Cancel** to go back to the Main Menu and then select **Setup**.

NOTE: If FORCEAUTH = Y, then the operator name is from the SyncLink logon ID and can not be modified by the handheld's operator.

Once you have defined your current location you are ready to begin scanning assets. Tap the 

button to begin the scanning process.

RECORD THE ASSET READ

Recording asset reads with a barcode scanner is as simple as “point and shoot.” In addition to supporting traditional scanning methods for 1D barcodes, MobileTrak is also equipped to support the scanning of 2D data matrices (Mark) and multiple simultaneous reads of RFID tags. In the event a barcode is damaged or unscannable, MobileTrak’s manual entry feature can be used to key in the asset identifier, DOD UID, or Sunflower UID.

Step 6 Scan the asset’s 1D barcode, 2D data matrix (Mark), or RFID tag. After each scan, the asset will appear on the Asset Read screen.

Note: MobileTrak Release 4.6 is equipped to perform multiple simultaneous reads of RFID tags. If this is this case for your organization, all the assets scanned will be listed on the Asset Read screen after a single push of the scan button.

NAVIGATION

- Tap **Start** icon
- Tap **MobileTrak**
- Tap **Asset Read**
- Select the appropriate asset read type from the drop down menu
- Scan the asset’s 1D barcode, 2D data matrix, or RFID tag
- The asset(s) will appear in the Asset Reads box

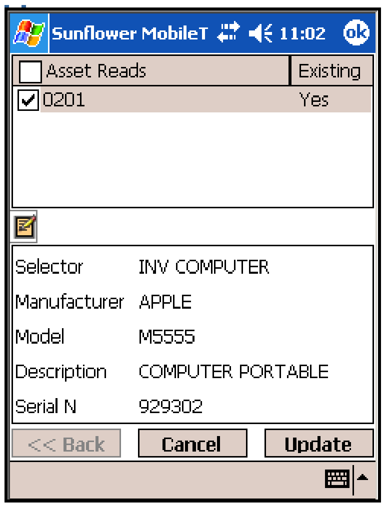


Figure 3-9: Asset read output.

The Asset Reads screen consists of the following field parameters and actions:

Parameter	Definition	Example
Asset Reads checkbox	Displays the scanned or manually entered asset barcode(s) and is automatically selected (checked).	0201
Existing	Indicates if the asset is in the current Sunflower database that was transferred to the scanner or not.	**Yes** or **No**

Edit icon	Tap the **Edit** icon to manually enter the barcode.	
Data display	Automatically displays existing asset data for the asset, which includes Module (i.e. INV for Inventory), catalog information, and Serial number.	INV COMPUTER “Catalog data” 929302
Back button	Initially inactive since nothing has been done. When enabled, allows you to return to the previous screen.	*select as required*
Cancel button	Initially inactive since there is nothing to cancel. When enabled, select to cancel this asset read, which removes the asset from the list without processing the resolution. **Note**: If selected a confirmation pop-up window displays to verify whether you wish to cancel.	*select as required*
Update button	Select to update data for existing assets. Takes you to the **Update** screen, which is a 2-page data entry screen. **Note**: **Update** displays for assets found in the database. If you scan/enter an asset not found, this button automatically changes from **Update** to **New**.	*select as required*
OK icon	Used to process your asset resolutions. **Note**: The **ok** icon Does Not take you back to the main menu. To return to the main menu you must Tap the **back** button and then Tap the **ok** icon.	*select as required*

Figure 3-10: Define Location fields

Step 7 Tap 

to create all resolutions without updating or adding new assets.

Step 8 If you wish to scan another asset, simply scan the barcode or Tap the **Edit** icon.

Continue scanning or manually entering the asset barcodes until you have scanned/entered all applicable assets within the current location.

Tap 

to **create** one resolution or all of your resolutions.

You can then Tap the **Back** button to return to the previous screen, enter a new location, Tap the **Next** button and resume scanning.

ALTERNATE MANUAL ASSET IDENTIFIER/UID ENTRY METHOD

As previously discussed you can Tap the **Edit** icon to perform a manual entry or you can use the alternate method for manual entry, which is holding the Stylus onto the Asset Read screen until a Blue **Enter identifier/UID** box displays, as shown below.

Step 1 Hold down the Stylus for a few seconds in the blank portion of the Asset Reads screen until the **Enter identifier/UID** box appears, as shown below.

NAVIGATION

- Tap **Start** icon
- Tap **MobileTrak**
- Tap **Asset Read**
- Select the appropriate asset read type from the drop down menu
- Hold down the stylus in the blank box until prompted to enter the identifier/UID
- Enter the identifier/UID and click **Enter** on the keypad

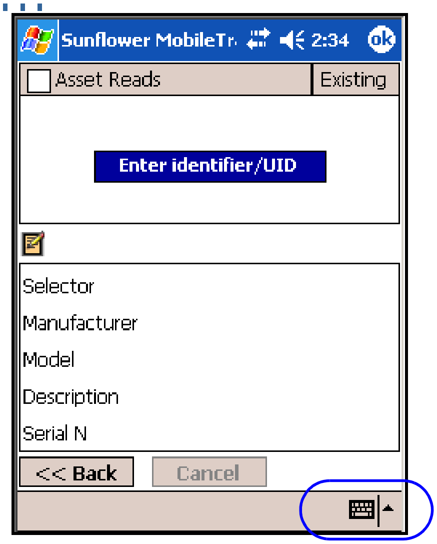


Figure 3-10: Manual asset identifier/UID entry

Step 2 Tap the **Enter identifier/UID** box, which opens a data entry field to the right of the **Edit** icon and automatically places your cursor in this field.

Note: For manual data entry you can use your scanner's keypad or Tap the **Keyboard** icon in the lower right-hand corner (circled above) to display an on-screen keyboard that you can use for data entry.

Step 3 Use your scanner's keypad or on-screen keyboard to enter the asset Identifier, DOD UID, or Sunflower UID, as shown below.

Step 4 Either click the **Enter** button on your scanner's keypad or Tap the **Return** key that is on the scanner's on-screen keyboard.

NAVIGATION

- Tap **Start** icon
- Tap **MobileTrak**
- Tap **Asset Read**
- Select the appropriate asset read type from the drop down menu
- Hold down the stylus in the blank box until prompted to enter the identifier/UID
- Enter the identifier/UID and click **Enter** on the keypad

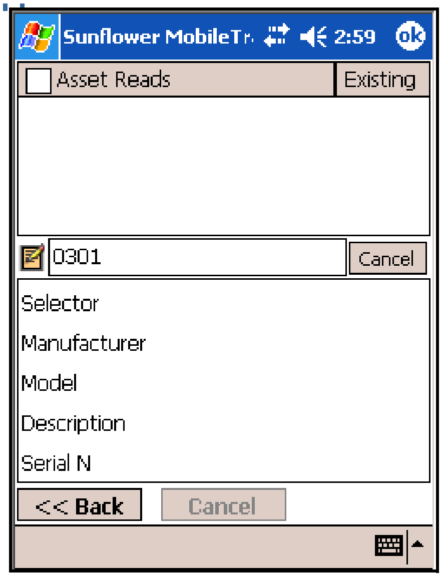


Figure 3-11: Populated Asset Selector screen using manual entry

When the asset has been entered, the Asset Selector section of the screen will be populated with the asset information just as if it had been scanned.

Update Asset Information

After scanning or manually entering an asset that is found in the reference file, you may change a wide variety of information. Perform the following to edit the asset's information.

Navigation

- Tap **Start** icon
- Tap **MobileTrak**
- Tap **Asset Read**
- Scan or manually enter the asset identifier/UID
- Tap the **Update** button

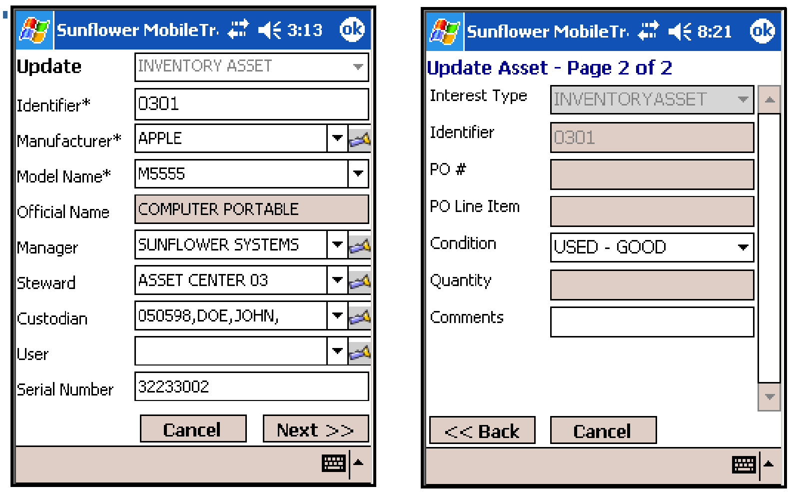


Figure 3-12: Update asset details screen

Step 1 Scan or manually enter an asset and then Tap the **Update** button, which opens the **Update** screen, as shown above on the left-hand graphic.

Step 2 Tap the **Next** button, which takes you to the **Update Asset - Page 2 of 2** screen, as shown above on the right-hand graphic.

Step 3 Update the appropriate data.

Note: Use the vertical scroll bar as required to update the appropriate field.
The **PO Number** and **PO Line Item** fields are only enabled when selecting Asset Receiving from the main menu.
The **Quantity** field is only enabled if the asset is a commodity asset.
The **Find** icon must be used to provide a list of values.

Step 4 Tap the icon to **save** your changes and return to the Asset Reads screen or Tap the **Cancel** button to cancel your changes.

Once you have tapped the icon, MobileTrak displays a message indicating that your record data has been saved, as shown below.

NAVIGATION

- Tap **Start** icon
- Tap **MobileTrak**
- Tap **Asset Read**
- Select the appropriate asset read type from the drop down menu
- Enter the identifier/UID and click **Enter** on the keypad
- Tap the **Update** button
- Tap the **ok** icon

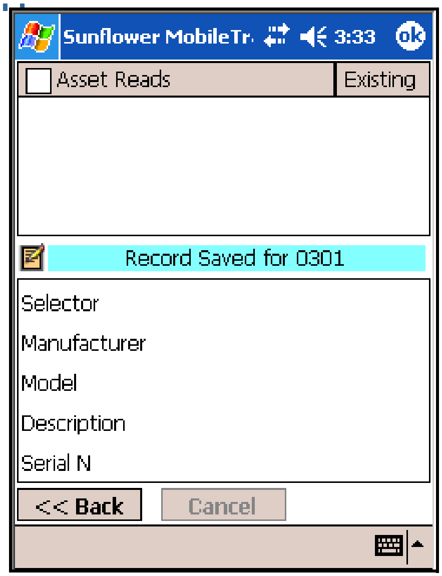


Figure 3-13: Populated Asset Selector screen using manual entry

You can either continue scanning other assets or Tap the **Back** button to return to the Asset Reads Location screen.

Asset Not Found in Reference Files

When an asset has been scanned or manually entered and MobileTrak does not recognize it as part of the reference database, MobileTrak indicates that it is not an Existing asset, as shown below.

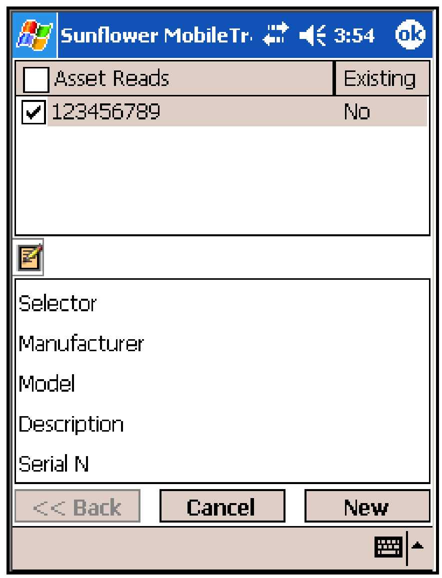


Figure 3-14: Asset not found in reference database

Notice that the Asset Selector fields are not populated, the Existing column indicates the asset is not in the reference database, and the **Update** button has automatically changed into a **New** button.

When an asset is scanned (or manually entered) and it is not in the database, the scanner operator has the following four options:

- Create a new asset
- Create a new SKU (used for commodity assets)
- Apply a Mark to an existing asset
- Tap the **Cancel** button to clear the asset read.

CREATE A NEW ASSET

The **Create New Asset** feature enables you to create a new asset record through MobileTrak. Perform the following steps to create a new asset:

Step 1 Tap the **New** button on the **Asset Read** screen to select an action.

NAVIGATION

- Tap the **New** button from the Asset Read Screen
- Select **Create New Asset**
- Tap **Next**

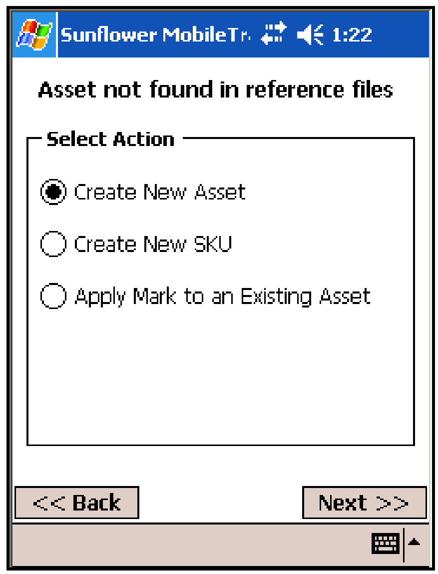


Figure 3-15: Select Action. Three options are presented when an asset is not found in the reference database

Step 2 If required, Tap the **Create New Asset** radio button.

Step 3 Tap the **Next >>** button.

Step 4 Complete the data entry fields by entering the appropriate data or selecting the entry from the drop down list (**required** fields have an **asterisk**).

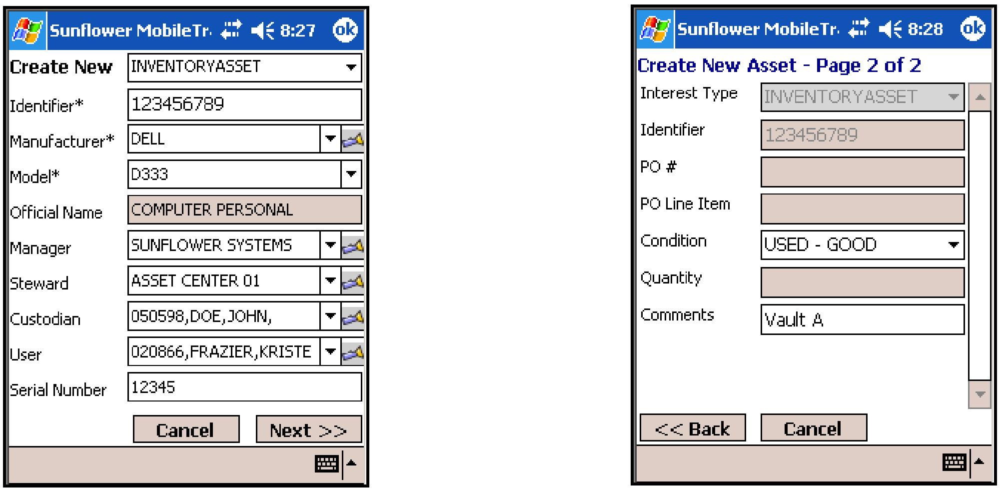


Figure 3-16: Create New Asset screen; use the **Next** and **back** buttons as required

FIELD NAME	VALUE	DESCRIPTION/EXPLANATION
Interest Type	INVENTORY ASSET	**Required**. Select the appropriate module from the drop-down.
Identifier	*defaults*	Defaults from your scan or manual entry on the Asset Read screen, but can be changed.
Manufacturer	DELL	**Required**. Enter the appropriate manufacture and Tap the **Find** icon.
Model Name	D333	**Required**. Enter or select the appropriate model name from the LOV.
Official Name	*defaults*	Defaults, based upon the catalog Manufacturer/Model combination.
Manager	Sunflower Systems	Optional. If known, enter the Manager and Tap the **Find** icon.
Steward	Asset Center 01	Optional. If known, enter the Steward and Tap the **Find** icon.
Custodian	050598,DOE,JOHN	Optional. If known, enter the Custodian and Tap the **Find** icon.
User	Kristen Frazier	Optional. If known, enter the User and Tap the **Find** icon.
Serial Number	12345	Optional. If known, enter the asset's serial number.
PO#	*shaded*	This field is only available when adding assets using the Asset Receiving screen.
PO Line Item	*shaded*	This field is only available when adding assets using the Asset Receiving screen.
Condition	USED - GOOD	Optional. Enter or select the asset's condition from the LOV.
Quantity	*shaded*	This field is only available when creating asset reads for commodity assets.
UDFs	VAULT A	As required. User Defined Fields (UDFs) allow capture of additional data.

Step 4 Tap ok to save the entered data and return to the Asset Read screen.

CREATE NEW SKU

Currently you can not create a new commodity asset using Sunflower MobileTrak. This choice provides the information that you scanned or manually entered a Stock Number and not an Asset Identifier.

This example shows what happens if you attempt to create a new SKU using MobileTrak after scanning a new Commodity Barcode or Tag Number.

Step 1 Tap the **Next** button on the **Asset Read** screen to select an action.

NAVIGATION

- Tap the **Next** button from the Asset Read Screen
- Select **Create New SKU**
- Tap **Next**

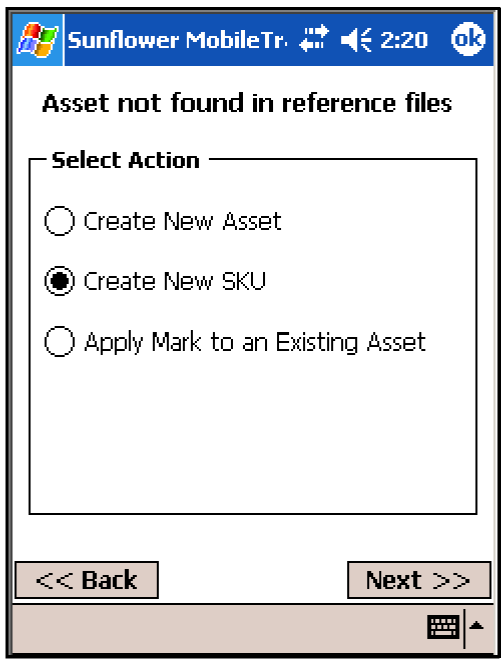


Figure 3-17: Create New SKU

Step 2 Tap the **Create New SKU** radio button.

Step 3 Tap the **Next >>** button.

Step 4 View the system generated message, as shown below.

NAVIGATION

- Tap the **Next** button from the Asset Read Screen
- Select **Create New SKU**
- Tap **Next**

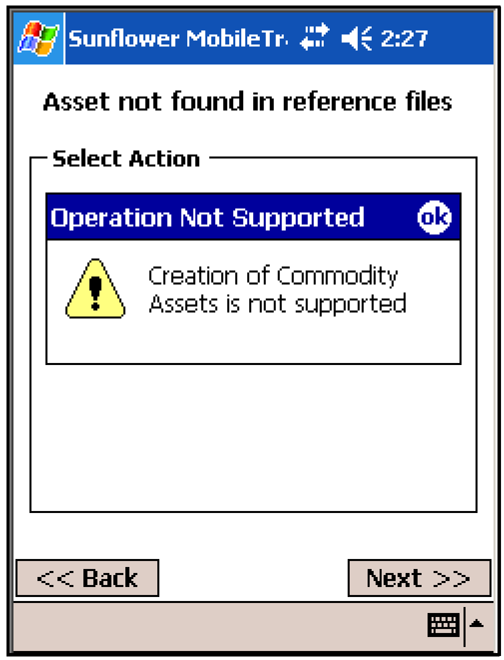


Figure 3-18: Create New SKU

In this situation you must Tap the **ok** icon, which returns you to the Asset Reads screen. Tap the **Cancel** button to cancel this scan and report your finding based upon your Business Policy.

APPLY MARK TO AN EXISTING ASSET

In addition to scanning traditional barcode technologies, MobileTrak also has the ability to recognize a 2D data matrix (Mark) affixed to assets. This choice provides the information that an additional or different type of tag has been affixed to the asset. For example, in the event a 2D data matrix is affixed to an asset that previously used a 1D barcode. Is this a new asset or is it an existing asset that has a new barcode technology affixed to it? If the latter is the case, MobileTrak can apply the new mark to the existing asset.

Step 1 Scan the 2-D Mark, which displays on the Asset Reads screen.

Step 2 Tap the New button on the **Asset Read** screen to select an action.

Step 3 Tap the **Apply Mark to an Existing Asset** radio button, which activates a data entry field.

NAVIGATION

- Tap the **New** button from the Asset Read Screen
- Select **Apply Mark to an Existing Asset**
- Scan or Enter the 1-D Identifier/UID
- Tap **ok**

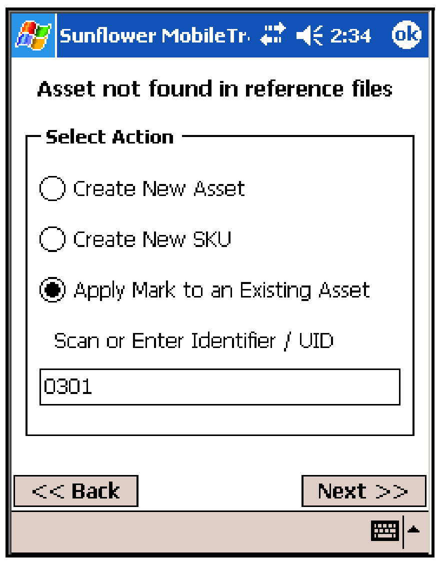


Figure 3-19: Apply Mark to an Existing Asset

Step 4 Scan (or manually enter) the 1-D asset identifier or UID.

Step 5 Tap ok to save the entered data and return to the Asset Read screen.

- If you determine that the new mark should not be applied to the asset, you can delete the transaction using the Review Scans feature.

REVIEW TRANSACTION COUNTS

The Transaction Counts screen is used to review data stored within the barcode scanner according to the type of transaction that occurred. This screen displays two columns: Transaction Type and Count. Transaction Type lists the types of transactions processed while using the barcode scanner (e.g. Asset Addition, Add Mark, Asset Change, etc.). The Count column displays the corresponding number of records associated to the transaction type.

NAVIGATION

- Tap **Start** icon
- Tap **MobileTrak**
- Tap **Transaction Counts**

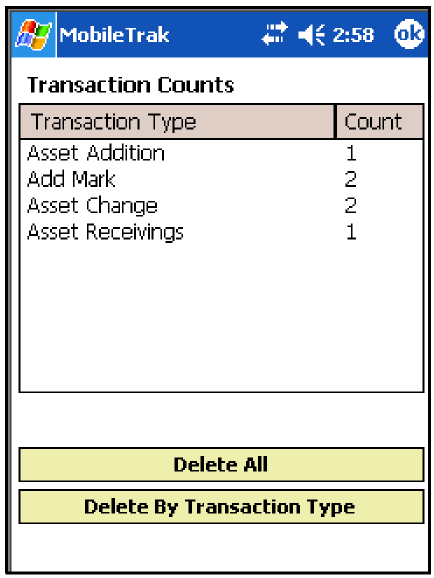


Figure 3-20: Transaction Counts screen and fields

Parameter	Definition
Transaction Type	Displays the types of transactions processed while using the barcode scanner.
Count	Displays the number of records associated with each transaction file.
Delete All button	Tap to erase **all** files from the scanner. **Note**: This action cannot be undone.
Delete by Transaction button	Tap to erase all files of a specific transaction type from the scanner (e.g. all Asset Additions, all Asset Changes, etc.). **Note**: This action cannot be undone.

Tap ok to exit the Transaction Counts screen and return to the main menu.

REVIEW SCANS

While the Transaction Counts feature provides a high level overview of the scans made during a physical inventory, the Review Scans feature drills down for more detail about the individual asset scans. Once assets have been scanned and saved, you may review the various asset reads from the Review Scans screen. Use the arrows at the bottom of the screen to review all the asset records.

NAVIGATION

- Tap **Start** icon
- Tap **MobileTrak**
- Tap **Review Scans**
- Use the arrow buttons to review assets

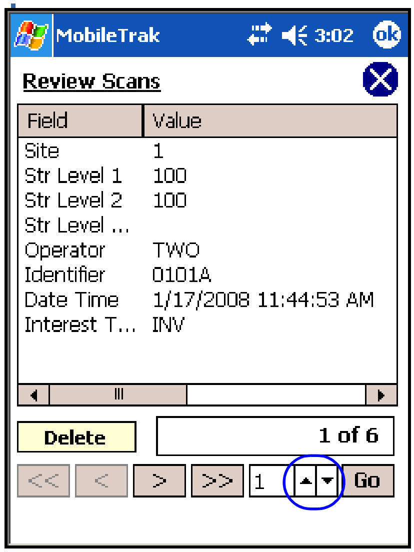


Figure 3-21: Review Scans screen

Parameter	Definition
Field	Displays the field names.
Value	Displays the information in the field for the specified asset.
Asset Number	Displays the record number of the asset you are viewing and the total number of records entered.
Delete button	Marks the individual asset scan for deletion. This function is shown in the next exercise.
Arrows (<<, <, >, >>)	Use these arrows to move back and forth between assets. << = Go to the First asset record. < = Go to the Previous asset record > = Go to the Next asset record >> = Go to the Last asset record
Up & Down arrows	Use these arrows (circled) like the Arrow Up and Arrow Down keys on a computer keyboard to move back and forth between assets.
Go button	Optionally enter an assets record number (i.e. 5) and tap the **Go** button to display the asset.

Delete an Asset Scan

Individual asset reads can be deleted from the scanner before uploading the data back to the Sunflower Assets database via SyncLink. Taping the **Delete** button will mark the individual asset scan for deletion, but will not delete the asset until you Tap the **ok** button.

If you want to undo the deletion before saving, Tap the **Undelete** button. Once a record is deleted from the scanner, it cannot be recovered. You will need to rescan the asset to include it in the physical inventory.

Navigation

- Tap **Start** icon
- Tap **MobileTrak**
- Tap **Review Scans**
- Use the arrow buttons to review assets
- Tap the **Delete** button to mark a scan for deletion

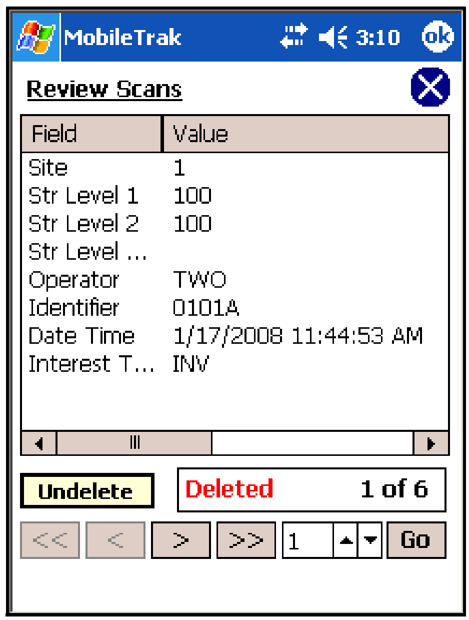


Figure 3-22: Asset marked for deletion

Step 1 Use the arrow buttons to locate the asset to be deleted.

Step 2 Tap the **Delete** button (which changes to **Undelete**) to mark the asset for deletion.

Step 3 Tap the ok button to save the deletion.

- To cancel deletions, Tap the **Undelete** button or Tap the icon.

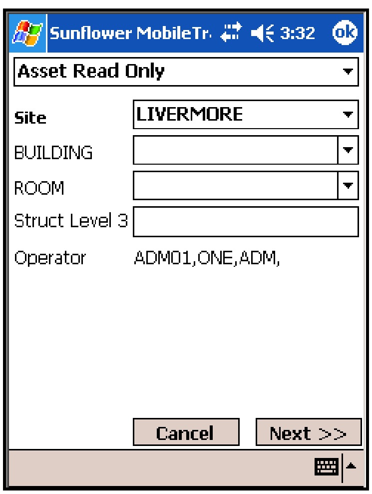
PERFORM ASSET RECEIVING

New to MobileTrak 4.6 is the Asset Receiving functionality. The Asset Receiving screen was created to help organizations with receiving staff use their barcode scanners configured with MobileTrak to easily and quickly receive new assets into inventory.

The Asset Receiving screen works exactly the same way as the Asset Read screen, except the **PO #** and **PO Line Item** fields are now available for the appropriate purchasing data entry.

No resolutions are recorded when using Asset Receiving.

Note: During installation, user code must be established to handle the two purchasing fields data entry when barcode scanned data is sent to the Sunflower Enterprise database. Otherwise the PO # and PO Line Item data will be lost during the barcode scanner upload process.



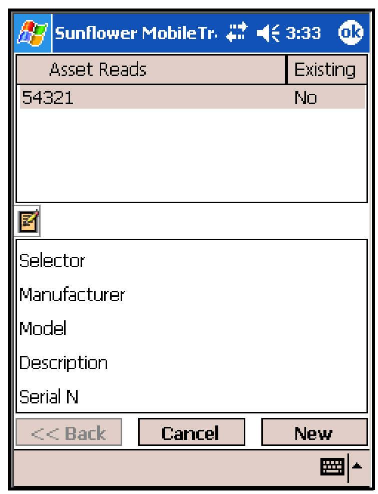


Figure 3-23: Asset Receiving

Step 1 If required, tap **Setup** and enter the appropriate data.

Step 2 Tap **Asset Receiving**.

Step 3 Select the appropriate Asset Read (i.e. Asset Read Only) and Location (i.e. **Site** = **LIVERMORE**), as shown above left, and Tap the Next button.

Step 4 Scan or manually enter the asset data, as shown above right (ID = 54321).

Step 5 Tap the New button to go to the **Receive New** screen.

Step 6 Enter the appropriate data. If applicable, enter the **PO #** and **PO Line Item** fields, which are now activated and available for data entry on Page 2 of 2, as shown below.

Step 7 Use the **Next** and **Back** buttons as required to complete the data entry.

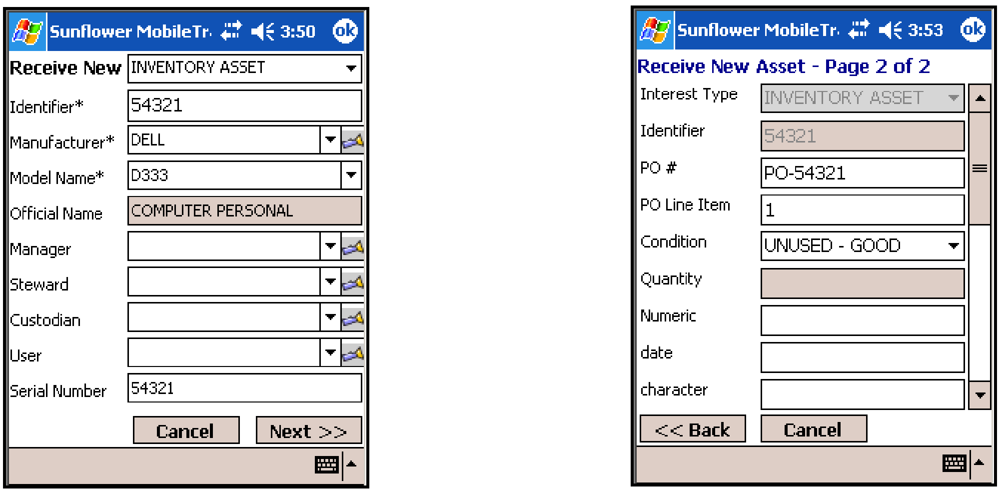


Figure 3-24: Asset Receiving Data Entry

Step 7 Upon completion of the data enter, Tap **ok** to return to the **Asset Reads** screen.

NAVIGATION

- Tap **Asset Receiving**
- Enter the appropriate Site and Tap **Next**
- Scan or Enter the Identifier/UID
- Tap **New**
- Enter the data
- Tap **ok**

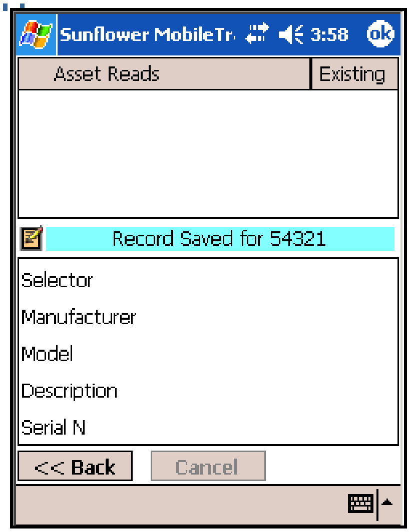


Figure 3-25: Asset Receiving - Record Saved

Step 4 Tap **OK** to close Asset Receiving.

UPLOAD PHYSICAL INVENTORY

4

When you have completed the task of scanning assets for your physical inventory, you will use SyncLink to transfer data from the barcode scanner to your Sunflower Assets database. This chapter discusses the steps involved to upload physical inventory data from the scanner, verify uploaded data, delete scanner files, and manage errors using the SyncLink application and the Sunflower Assets application.

This chapter includes the following discussion points and concepts:

- Upload Asset Reads
- Delete Barcode Scanner Files
- Manage Errors with Reports
- Manage Errors with Forms

UPLOAD ASSET READS

After you have completed the scanning (and/or manual entry) activities for your physical inventory, you will need to upload the collected data to your Sunflower Assets database via SyncLink. Recall that SyncLink acts as the conduit to transfer data between your PC and the barcode scanner for use with the MobileTrak application. This chapter will discuss how to:

- Transfer (upload) asset reads from the barcode scanner to your Sunflower Assets database
- Process asset reads that were transferred (uploaded) to the interface tables in your Sunflower Assets database

Note: Only records with errors will be in the interface tables, awaiting resolution.

Depending upon your settings more than one interface table may be involved. For example; if an error exists in the resolution of an asset record the Review Interface table will be affected (Path: Review > Edit Resolution Interface Records).

However, if an error exists with a location data update for an Inventory Management asset record the Management Interface table will also be affected (Path: Mgmt > Edit Inventory Asset Interface Records).

Upload Asset Reads to the Sunflower Assets Database

With just a few clicks of your mouse, SyncLink provides an easy mechanism for transferring (uploading) data from the barcode scanner to your Sunflower Assets database and/or interface tables. Ensure the scanner is in the cradle and connected to your PC before commencing the upload process.

Step 1 Place the scanner into its cradle (verify it connected to your PC).

Step 2 Ensure you have shut down MobileTrak.

Step 3 Start SyncLink and enter your Username and Password on the login page.

Step 4 Highlight **MobileTrak** in the Application Name column.

Step 5 Click the Get From Scanner button.

Step 6 Acknowledge the reminder message to shutdown MobileTrak.

NAVIGATION

- Place the scanner in the cradle, verify it is connected to your PC
- Start SyncLink and enter Username and Password
- Select **MobileTrak** in the Application Name column
- Click the **Get From Scanner** button

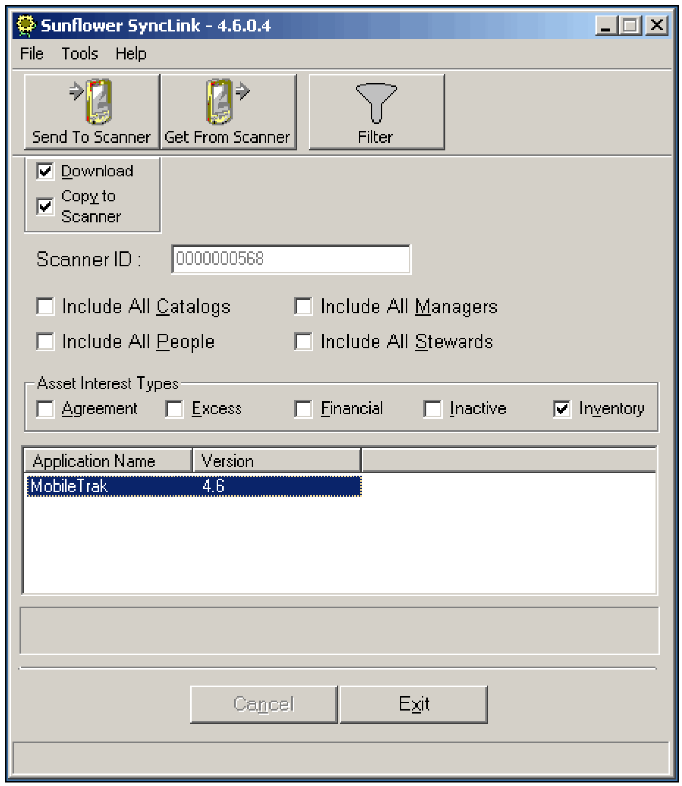


Figure 4-1: Transfer (upload) barcode scanner files via SyncLink to the Sunflower Assets database

Step 5 View the results of your barcode processing, as shown below.

Note: The **Messages** field is not used for showing why records failed to process. This area is used to display errors in getting data to the database (such as the reason that the information is not physically getting from the scanner to the database). The **Next** and **Previous** buttons, when activated, allow you to scroll back and forth between different error messages.

NAVIGATION

- Click **Get From Scanner**

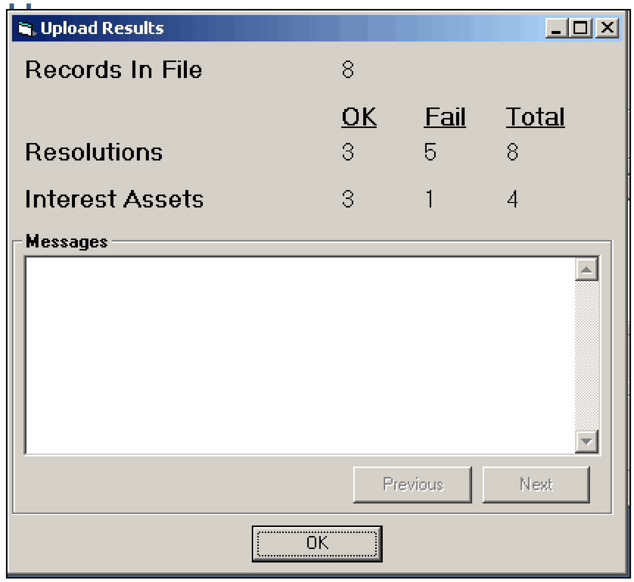


Figure 4-2: SyncLink upload results

Step 5 Click the **Ok** button. A Delete Files pop-up window displays.

DELETE SCANNER FILES

When uploading is complete, you will receive a prompt asking if you would like to delete the files from the scanner. Deleting the existing files from your barcode scanner will prevent uploading the same resolutions, changes, and additions more than once, which would result in an error message. SyncLink will display the following message when the upload is complete:

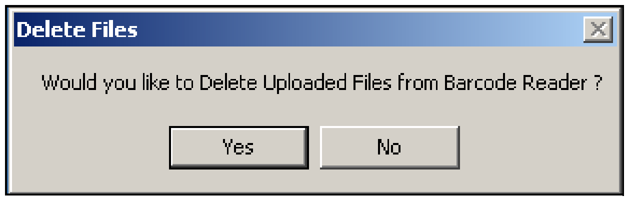


Figure 4-3: Delete scanner files

SELECTING YES OR NO TO DELETE UPLOADED FILES

The answer to this question depends on your understanding of the Upload Results form shown on the previous page. In this example it shows that all of the resolutions failed to process from the load tables into the core Sunflower Enterprise. In addition, the one change or create new asset also failed to process.

Print out the Resolution Interface Processing Results report (**Reports > Review Reports > Resolution Interface Processing Results**) and the appropriate Asset Interface Processing Results report(s).
For example, if you changed an Agreement asset and created an Inventory asset then you need to print both the Agreement Asset Interface Processing Results and the Inventory Asset Interface Processing Results reports.

If you understand the outcome of the report's results, then click the **Yes** button and delete the files.

If you select the **No** button you can always go back to the scanner, Tap **Transaction Counts**, and then Tap **Delete All**.

In addition, in the Upload Results form, if the number of records in the file is greater than the number of total resolutions then contact your organization's authorized representative to get help.

Essentially, when you receive any failures in the Upload Results form, you need to run the appropriate report and go to the applicable form in Sunflower Enterprise and resolve the failures.

MANAGE ERRORS WITH REPORTS

Errors can occur during the processing of the interface table records. Sunflower Enterprise provides a report that displays the details of processing the interface records that have been uploaded from the barcode scanner. Some of the errors may be due to invalid values entered in the MobileTrak fields or insufficient rights for the user to upload the resolutions to Sunflower Enterprise.

You can run the Resolution Interface Processing Results report directly from SyncLink by selecting Reports from the File menu. Alternatively, you can also run the appropriate reports in Sunflower Enterprise by selecting **Reports > Management Reports** and then selecting the **Inventory Asset Interface Processing Results** report from the menu and then selecting **Reports > Review Reports > Resolution Interface Processing Results**. The benefit from running the report from SyncLink is that the Load Group value will auto populate.

NAVIGATION

- Click **File**
- Click **Reports**

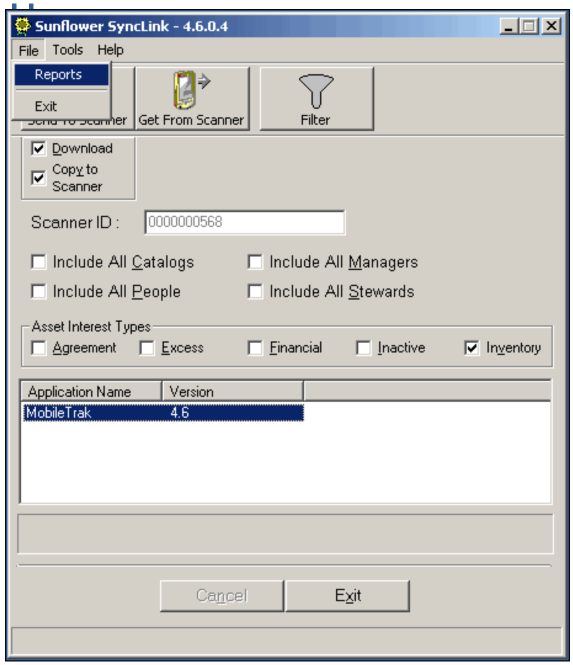


Figure 4-4: Resolution Interface Processing Results

Use the following steps to create an Interest Asset Interface Processing Results report.

Step 1 Select **Reports** from the SyncLink **File** menu, as shown on the previous page.

Step 2 Select a file display output type; either Adobe **Acrobat** or **HTML**, as shown below.

Step 3 Click the **eXecute** button to create the report.

NAVIGATION

- Click **File**
- Click **Reports**
- Select **Acrobat** or **HTML** as the file output
- Click the **eXecute** button

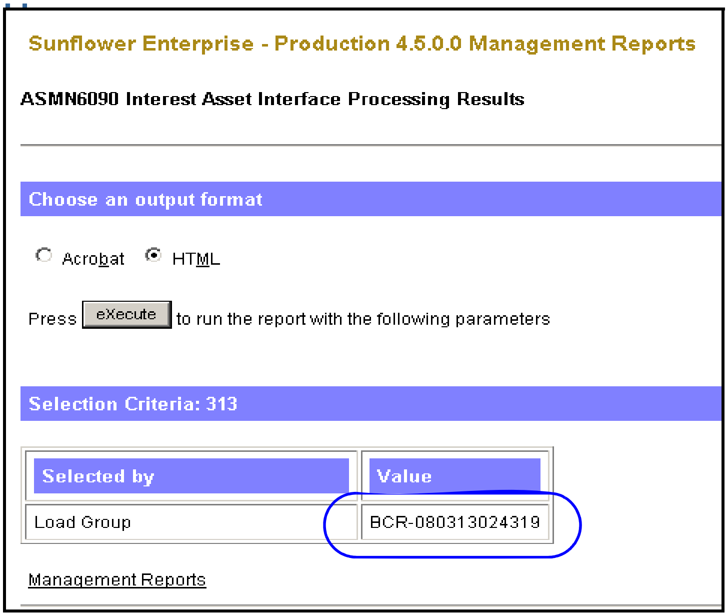


Figure 4-5: Inventory Asset Interface Processing Results

Note the Load Group, which can be helpful on the Interface forms.

Step 5 View the report, an example of which is provided below.

NAVIGATION

- Select **Adobe** or **HTML** as the file output
- Click **Execute** to run the report

Sunflower Enterprise
ASMN6090

Interest Asset Interface Processing Results

Page 2 of 4
03/13/2008 15:10

Load Group : BCR-080313024319

Record Group	Date	Result
568-5	03/13/2008 13:43:33	OK (Identifier:0309 INV - Site:1 Stlvl 1:BUILDING 100 Stlvl 2:ROOM 123 Stlvl 3:)
568-7	03/13/2008 13:43:33	OK (Identifier:0109A INV - Site:1 Stlvl 1:BUILDING 100 Stlvl 2:ROOM 100 Stlvl 3:)
568-8	03/13/2008 13:43:33	OK (Identifier:98765 Site:1 Stlvl 1:BUILDING 100 Stlvl 2:ROOM 100 Stlvl 3:)
Success Total	3	

Record Group	Date	Result
568-4	03/13/2008 13:43:33	AS-01011: Two instances of AS_INVENTORY_ASSET cannot have identifier 11308 simultaneously (Identifier:11308 Site:1 Stlvl 1:BUILDING 100 Stlvl 2:ROOM 123 Stlvl 3:)
Failure Total	1	
Load Group Total	4	

Figure 4-6: Report Output

This report example shows that 3 items were processed Successful and 1 item Failed.

Run the BCR Upload Differences Detail by Asset Report

New to MobileTrak 4.6, are two reports specific to barcode processing, which are available from the Barcode menu in Sunflower Enterprise v4.5 application.

- BCR Upload Differences Detail by Asset report
- Updates Made Through Inventory report

The **BCR Upload Differences Detail by Asset** report is only populated if there were errors in the barcode scanner to Sunflower Enterprise database upload process, either due to missing or incorrect data or possibly a lack of privileges on the barcode user. This report can also be run from the Differences Detail By Asset form by clicking the **Print Report** button at the bottom of the form. This report provides a line-by-line comparison of the original Sunflower Enterprise database information and what was entered through the barcode scanner.

Navigation

- Click **Reports**
- Click **Barcode Reports**
- Click **BCR Upload Differences Detail By Asset**

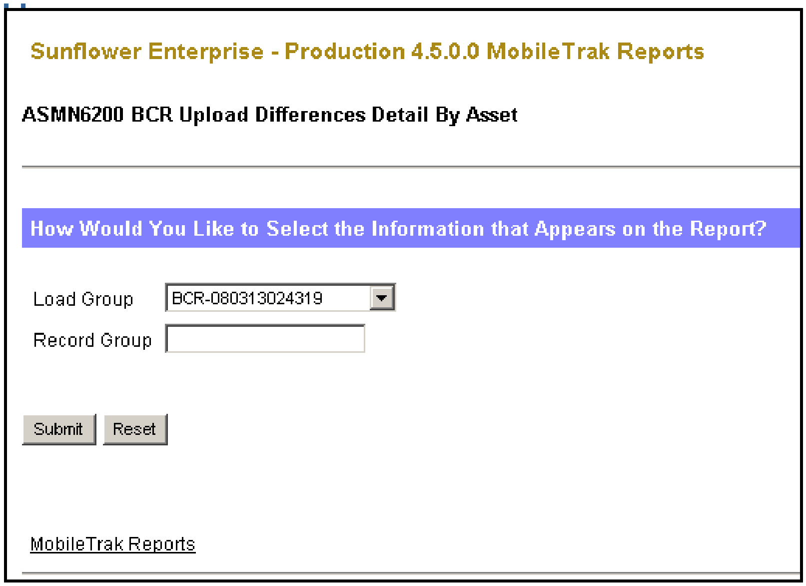


Figure 4-7: BCR Upload Differences Detail By Asset Report Parameter Page

Step 1 Navigate to the Barcode Reports screen.

Step 2 Select the BCR Upload Differences Detail By Asset link.

Step 3 Enter or select the desired Load Group from the List of Values.

Step 4 Optionally, enter the desired Record Group or leave this field blank.

Step 5 Click the **Submit** button.

Step 6 Chose an output format, either Acrobat or HTML and click the **eXecute** button.

Step 7 View the report output. The example shown below is for a new asset.

Sunflower Enterprise — Bar Code Reader Upload - Differences Detail By Asset — Page 2 of 4
ASMN6200 — 03/13/2008 15:21

Load Group : BCR-080313024319 — Record Group : 568-4
New Asset:11308

Modified?	Field/Context	Old (Current) Value	New (As Recorded)Value
Y	Serial Number The serial number assigned by the manufacturer		11308ABC
Y	Manufacturer Name The organization's name, e.g. SUNFLOWER SYSTEMS		DELL
Y	Model The model number assigned by the manufacturer		D333
Y	Official Name The institution's nomenclature for this mfr/model pair		COMPUTERPERSONAL
Y	Custodian Identifier An identifier assigned by the institution, e.g. badge no		050698
Y	Custodian First The person's first name, e.g. JANE		JANE
Y	Custodian Last Name The person's last name, e.g. SMITH		DOE
Y	Manager Name The organization's name, e.g. SUNFLOWER SYSTEMS		SUNFLOWERSYSTEMS
Y	Steward Name The organization's name, e.g. SUNFLOWER SYSTEMS		ASSETCENTER01
Y	Site Code The site's short name, e.g. 02		1
Y	Structure Level 1 Type Code The structure level 1 type's short name, e.g. BLDG		BUILDING
Y	Structure Level 1 Identifier The number assigned to the structure by the institution, e.g. 671		100
Y	Structure Level 2 Type Code The strucute level 2 type's short name, e.g. RM		ROOM

Figure 4-8: Report Output

Step 5 Either close the report or click the Browser **Back** button three times.

Run the Updates Made Through Inventory Report

The Updates Made Through Inventory report provides a historical look at changes made to assets through the barcode scanner process. You can either run the report for a load group or for a number of load groups (uploads) over a given period of time.

Navigation

- Click **Reports**
- Click **Barcode Reports**
- Click **Updates Made Through Inventory**

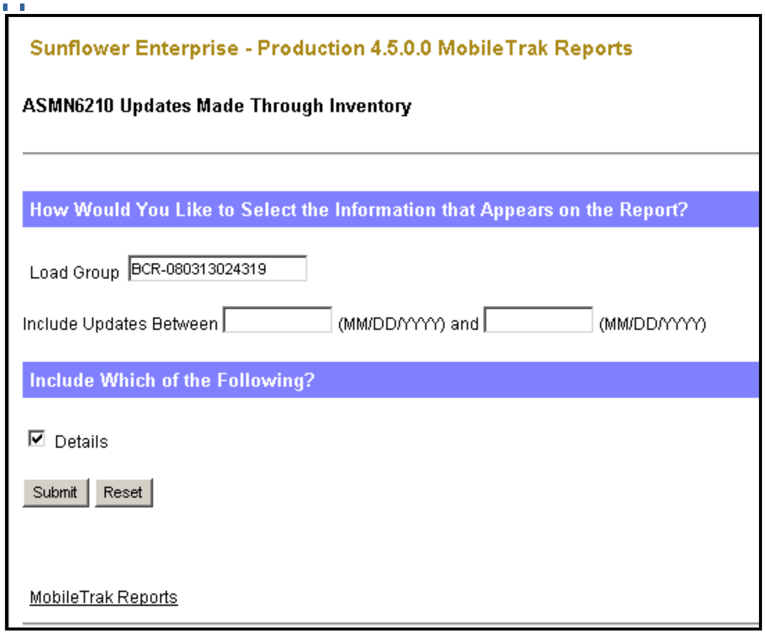


Figure 4-9: Updates Made Through Inventory Report Parameter Page

Step 1 If required, navigate to the Barcode Reports screen.

Step 2 Select the Updates Made Through Inventory link.

Step 3 Either enter a Load Group or a date range.

Note: For a detailed output, select (check) the **Details** checkbox.

Step 4 Click the **Submit** button.

Step 5 Chose an output format, either Acrobat or HTML and click the **eXecute** button.

Step 6 View the report output, as shown below.

Sunflower Enterprise

BAR CODE READER UPLOAD - UPDATES MADE THROUGH INVENTORY

ASMN6210

Run By
THREE ADM ADM03

Run Date
03/13/2008 15:33

Selection Criteria : 315

Load Group : BCR-080313024319
Begin Date:
End Date:
Include Detail: Y

Sunflower Enterprise
ASMN6210

Page 2 of 4
03/13/2008 15:33

Load Group	Identifier	Condition	Catalog	Manager	Steward	Custodian	User	Location
BCR-080313024319	2	1	0	0	0	0	0	1

Figure 4-10: Updates Made Through Inventory Report Output

Step 5 Close the report.

ERROR MANAGEMENT WITH FORMS

New to MobileTrak 4.6, two new forms (screens) are available from the Barcode menu within the Sunflower Enterprise application that help you to manage and resolve errors in barcode processing.

- Differences Detail by Asset form
- Error Detail By Error Code form

DIFFERENCES DETAIL BY ASSET

When you upload the data from your barcode scanner, there may be incorrect data or missing required data field information. If this occurs, the appropriate identifier information will stay in the load table, where you can view and correct the error(s).

Note: Data will **only** display on this form if there is an error.

NAVIGATION

- Click **Barcode**
- Click **Differences Detail By Asset**

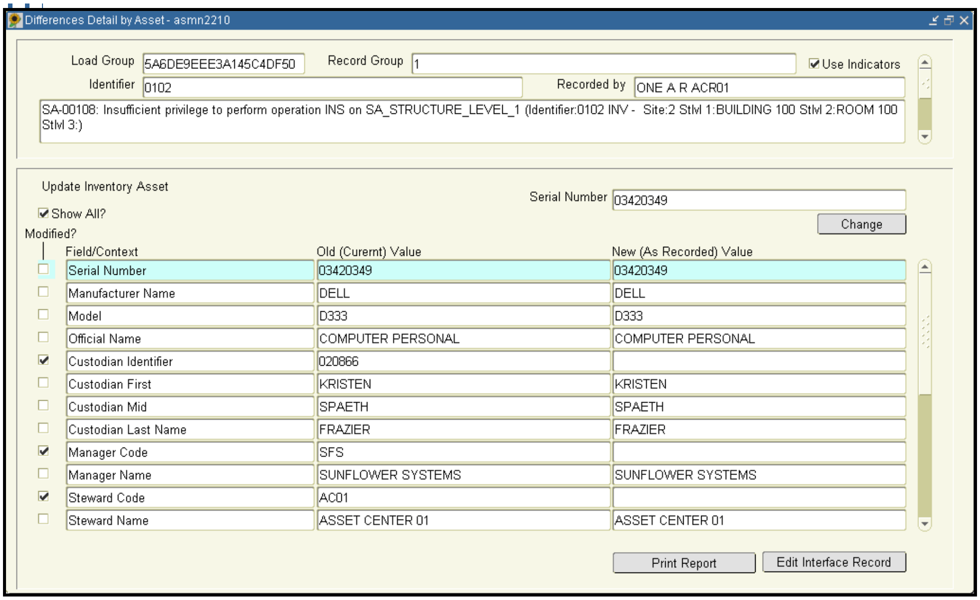


Figure 4-11: Differences Detail by Asset form

Step 1 Navigate to the **Differences Detail by Asset** form.

Step 2 Use the default values or select as desired.

Tips: After resolving the error (or errors), click the **Save** icon to save your changes and allow the system to validate the revised data. If there are no further errors, then your data entry will automatically update the Sunflower Assets database and no longer display on the Differences Detail by Asset form.

FIELD NAME	DESCRIPTION/EXPLANATION
Load Group	Enter the specific load group designation or click the **Find** icon twice to populate the form. For training, click the **Find** icon twice. **Note**: If the Vertical scrollbar is activated (as shown on the previous page), you can use the Arrow Down and Up keys on your keyboard to view other Load Group data.
Record Group	Displays the system assigned record group number.
Use Indicators checkbox	Used to determine how you want the system to process "Null" or blank data fields. If the Default = False (unselected), all fields that have an upload value of NULL will be affected.
Identifier	Displays the asset Identifier.
Recorded By	Displays who performed the barcode scan.
"Message Window"	Displays the error or problem that needs to be resolved.
Update Inventory Asset block	
Show All? checkbox	Default. Shows **all** Barcode related fields. **Note**: Uncheck to display only those lines that have the **Modified?** checkbox selected, which are those that have been changed or modified.
"Display Field"	The Field/Context displayed coincides with the line item selected (highlighted). Used to update **New (As Recorded) Value** data as appropriate.
Change button	Use this button to populate (change) the selected **New (As Recorded) Value** data based upon your entry in the "Display Field."
Modified? checkbox	Autopopulates to show those line items that have changes between the Old (current SFA database) and New (barcode) data.
Field/Context	Displays the MobileTrak Barcode fields.
Old (Current) Value	Displays the Sunflower Asset's database source (reference) data that was downloaded to the barcode scanner.
New (As Recorded) Value	Displays the barcode scan or barcode manual entry that was uploaded from the barcode scanner.
Print Report button	Provides a shortcut to the BCR Upload Differences Detail By Asset report and automatically fills in the appropriate search criteria.
Edit Interface Record button	Provides a shortcut to the Edit Inventory Asset Interface Records form. **Note**: If you click this button, to return to the Differences Detail by Asset form click the **Exit** icon.

Error Detail by Error Code

The BCR Upload Error Detail by Error Code form is used to update one, some, or all records for a specific category (i.e. location, catalog, etc.) error.

Note: Data will **only** display on this form if there is an error.

Navigation

- Click **Barcode**
- Click **Error Detail by Error Code**

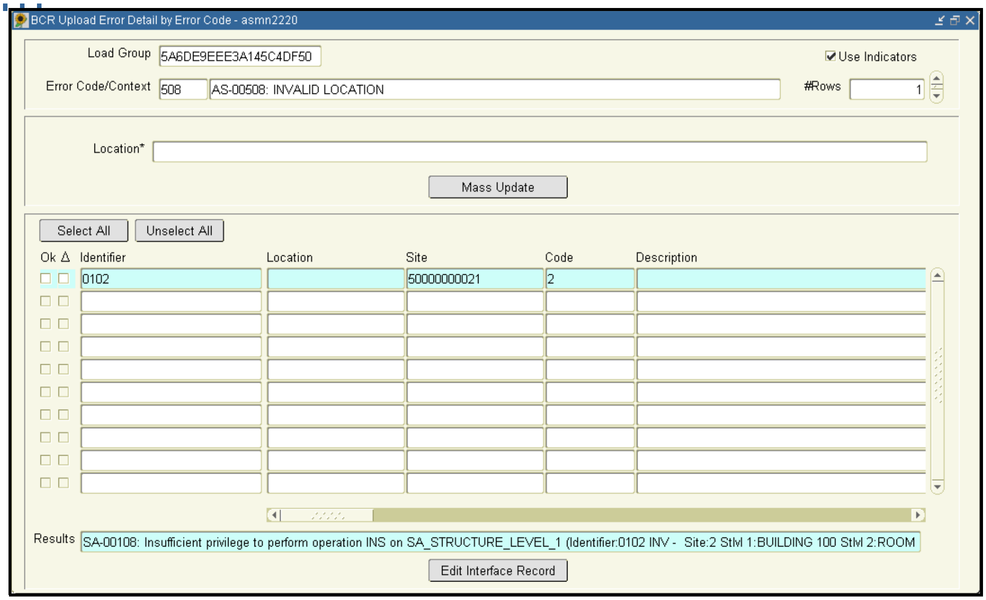


Figure 4-12: Error Detail by Error Code Form

Step 1 Navigate to the **BCR Upload Error Detail by Error Code** form.

Step 2 Use default or select values as needed.

Step 3 After resolving the error(s) select the appropriate line items and then click the **Save** icon to save your changes and allow the system to validate the revised data. If there are no further errors, then your data entry will automatically update the Sunflower Assets database and no longer display on the BCR Upload Error Detail by Error Code form.

FIELD NAME	DESCRIPTION/EXPLANATION
Load Group	Enter the specific load group designation or click the **Find** icon twice to populate the form. For training, click the **Find** icon twice. **Note**: If the Vertical scrollbar is activated (as shown above), you can use the Arrow Down and Up keys on your keyboard to view other Load Group data.
Use Indicators checkbox	Used to determine how you want the system to process “Null” or blank data fields. If the Default= False (unselected), all fields that have an upload value of NULL will be affected.
Error Code/Context	Displays the system generated error code and context.
#Rows	Displays the system generated row information.
“Category Resolution” block	Displays the appropriate fields that you can use to fix the error. In the example shown above, the error deals with an invalid location entry. Therefore, the Location* complex field displays. Double-click to open the complex field, enter the correct location data, and click the **Save** icon to close the Locations pop-up window and save your location data entry.
Select All button	Select this button to check (enable) all displayed Delta line items. **Note**: Only the line items that have the Delta (change) checkbox selected will be affected when you save the form.
Unselect All button	Select this button to uncheck (disable) all displayed Delta line items.
Ok checkbox	Autopopulates upon saving, but only for those line items that have the Delta (change) checkbox selected (enabled).
Delta (change) checkbox	Determines which line items are affected upon saving. Only those items that are checked (enabled) will be affected.
Identifier	Autopopulates only for those items where there is an error present.
Additional Fields	Additional fields display based upon the nature of the error.
Results	If applicable, displays additional error related information.
Edit Interface Record button	Provides a shortcut to the Edit Inventory Asset Interface Records form. **Note**: If you click this button, to return to the Differences Detail by Asset form click the **Exit** icon.

5

GET HELP

The Get Help chapter introduces you to the Sunflower Assets online context sensitive help system, other methods for getting support, and tips for using your Sunflower application.

KEY CONCEPTS

This chapter will include the following discussion points and concepts:

- Online Help
- Customer Care
- Sunflower Academy

OBJECTIVES

By the end of this chapter, you should be able to:

- Use Context Sensitive Help
- View and Navigate Sunflower Online Help
- Access Sunflower's Customer Care Website
- Access Sunflower Academy

USE CONTEXT SENSITIVE HELP

Use the online Help system to learn more about a form's function or purpose. The online Help System is context-sensitive. Therefore, when activated it will open and automatically take you directly to the HTML page that corresponds to your current form (screen). A brief description of your current form is provided along with a list of common tasks that you can accomplish with the relevant form. Select a Help option (hyperlink) to receive step-by-step instructions about how to perform a task. This chapter will acquaint you with Sunflower's online help system, which is always available to assist you.

ACCESS CONTEXT SENSITIVE ONLINE HELP

To access Sunflower's Online Help, open a form and either click the Tool Bar Help icon (**?**) or select **Help > Help** from the Menu Bar.

Note: If you are on the Sunflower Splash page (no form open) the Tool Bar (icons) are not available. Select **Help > Help** from the Menu Bar, which opens the Help Main Menu page.

Step 1 Navigate to the Maintain Inventory Assets form.

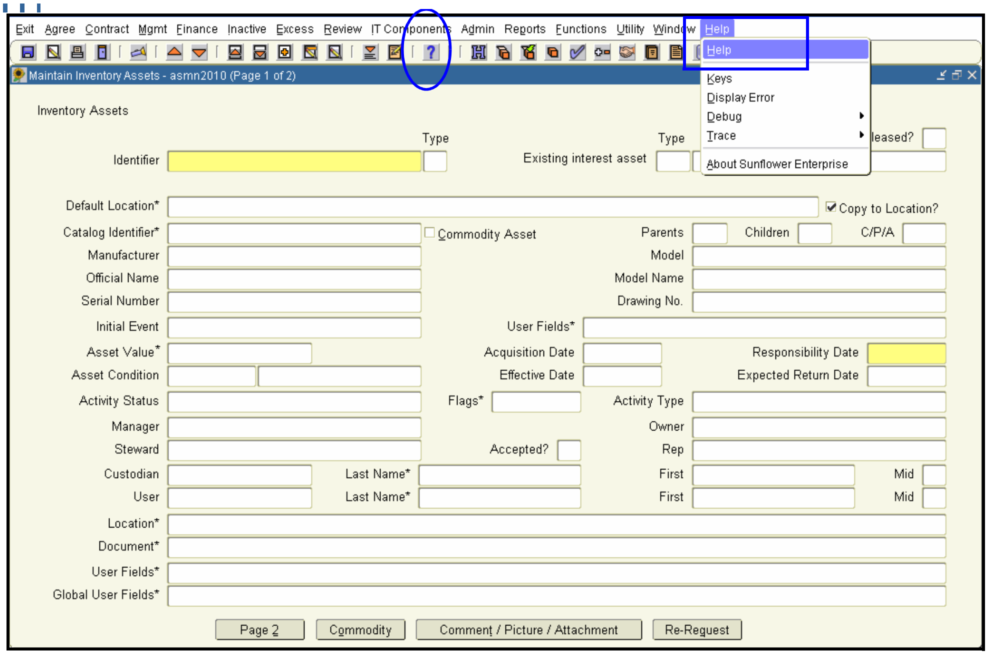
Step 2 Either click the **Help** icon (circled) or select **Help > Help** (highlighted).

NAVIGATION

- Click **Mgmt**
- Click **Maintain Inventory Assets**
- Click the Help icon (**?**)

or

- Select **Help > Help**



View Context Sensitive Online Help

Once you open the Sunflower Online Help file, you can select the applicable task to review.

Step 1 Review the brief description.

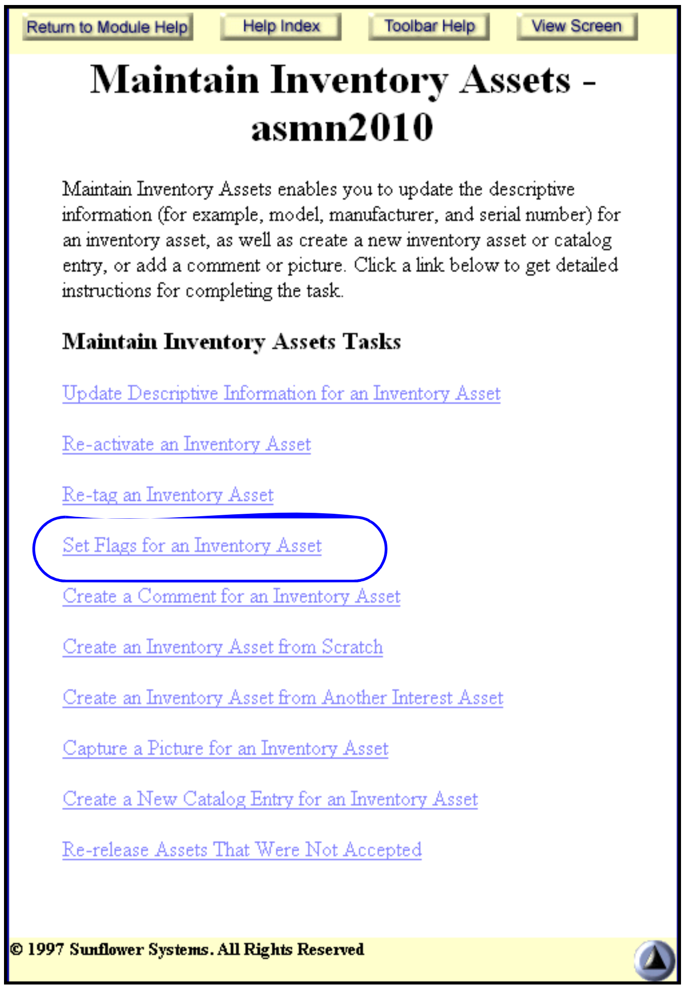
Step 2 Click the **Set Flags for an Inventory Asset** hyperlink (circled).

Navigation

- Click **Mgmt**
- Click **Maintain Inventory Assets**
- Click the Help icon (**?**)

or

- Select **Help > Help**
- Click **Set Flags for an Inventory Asset**



NOTE: The Set Flags for an Inventory Asset detailed help screen is shown on the next page.

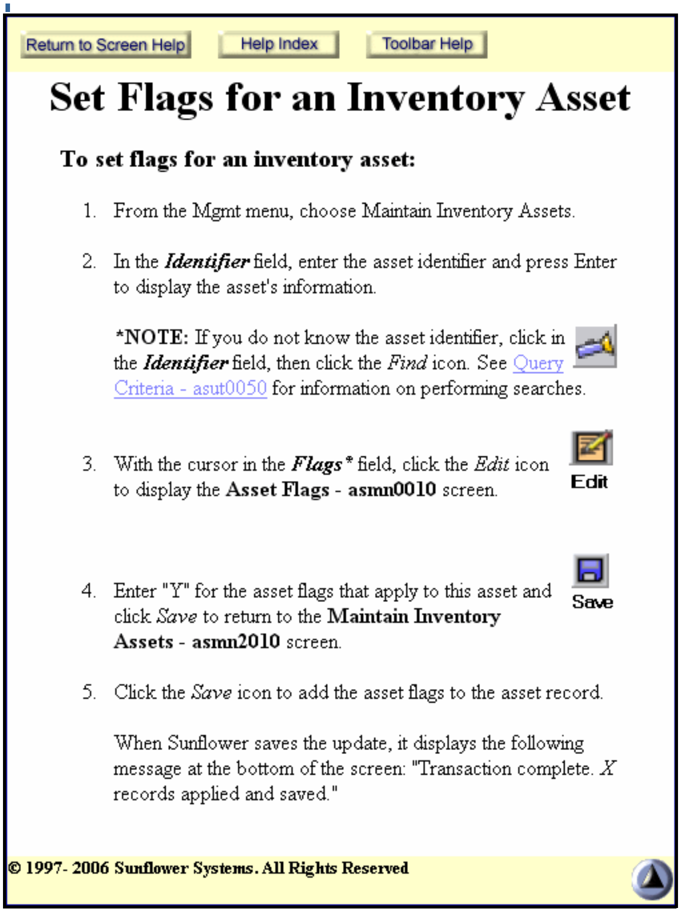
Step 3 View the **Set Flags for an Inventory Asset** page, as shown below.

NAVIGATION

- Click **Mgmt**
- Click **Maintain Inventory Assets**
- Click the Help icon (?)

or

- Select **Help > Help**
- Click **Set Flags for an Inventory Asset**



Return to Screen Help | Help Index | Toolbar Help

Set Flags for an Inventory Asset

To set flags for an inventory asset:

1. From the Mgmt menu, choose Maintain Inventory Assets.
2. In the ***Identifier*** field, enter the asset identifier and press Enter to display the asset's information.

   NOTE:** If you do not know the asset identifier, click in the ***Identifier field, then click the *Find* icon. See Query Criteria - asut0050 for information on performing searches.

3. With the cursor in the ***Flags**** field, click the *Edit* icon to display the **Asset Flags - asmn0010** screen.

   Edit

4. Enter "Y" for the asset flags that apply to this asset and click *Save* to return to the **Maintain Inventory Assets - asmn2010** screen.

   Save

5. Click the *Save* icon to add the asset flags to the asset record.

   When Sunflower saves the update, it displays the following message at the bottom of the screen: "Transaction complete. *X* records applied and saved."

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Step 4 Click the **Return to Screen Help** button.

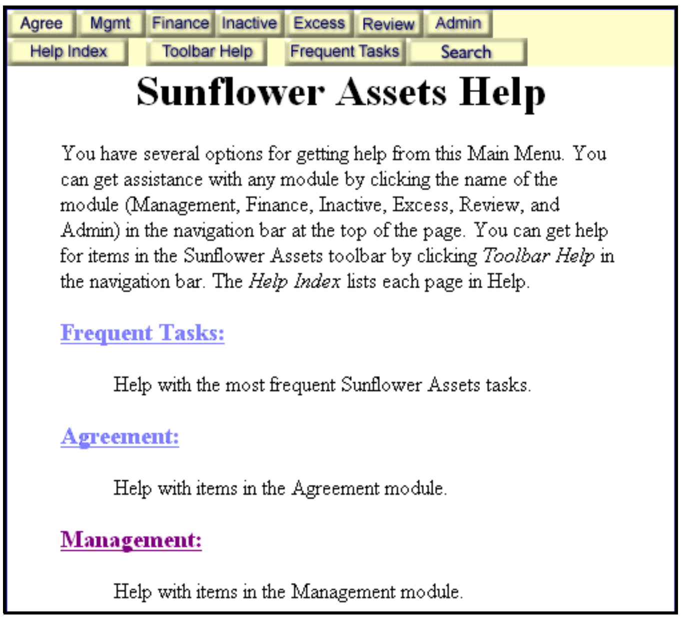
Step 5 Click the **Return to Module Help** button, which displays all help items within the Management module.

Step 6 Click the **Return to Main Help** button, which displays the Main Help menu screen, which will be used in the following exercise.

VIEW SUNFLOWER HELP (MAIN MENU)

The Sunflower Assets Help “Main Menu” provides you with several options for getting assistance. You can view any of these help topics at your convenience.

Step 1 If required, close any open Sunflower forms and select **Help > Help** from the Menu Bar.

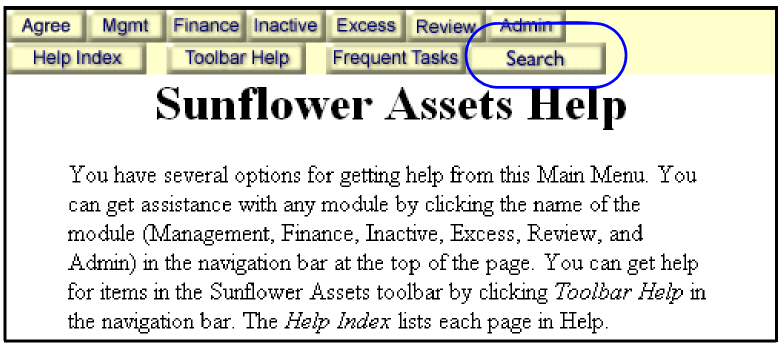


FIELD NAME	VALUE	DESCRIPTION/EXPLANATION
Sunflower Assets Help (Main Menu)	**Module**	Click any of the module buttons (i.e. Agree, Mgmt, Finance, Admin, etc.) across the top of the page or the hyperlinks listed down the page to view help topics associated with those individual modules.
	Help Index	If you know the activity you wish to perform, but don’t know where to locate it within the Sunflower Help System you can search for it by expanding the entire Help library.
	Toolbar Help	Displays the **Tool Bar icons** and their uses.
	Frequent Tasks	Displays hyperlinks to the most frequent tasks performed with Sunflower Assets.
	Search	Enter a word or phrase in the **Search for** field, select your **Find** criteria, and click **Search**.

SEARCH FOR HELP TOPICS

Use the search function provided within the online help system when you know the activity you wish to perform, but do not know where to find the help topic discussion in the help system.

Step 1 Click the **Search** button (circled).

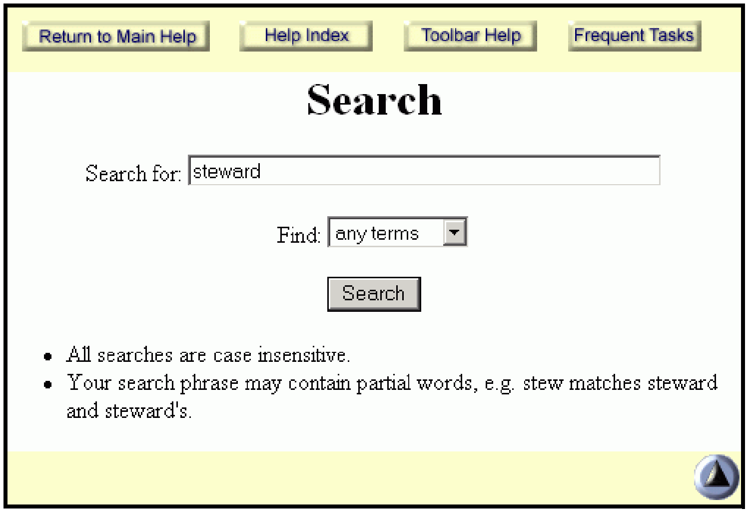


Step 2 Enter the task or key word of the task you wish to perform, such as ***steward***.

Step 3 In the **Find** field, select **any terms**.

Note: Using the Sunflower Enterprise Personalized Application View (Term Set) feature effects Forms, Report Parameter pages, and Reports. However, Help is constructed of static HTML pages and therefore is not currently effected by any Term Set changes or modifications.

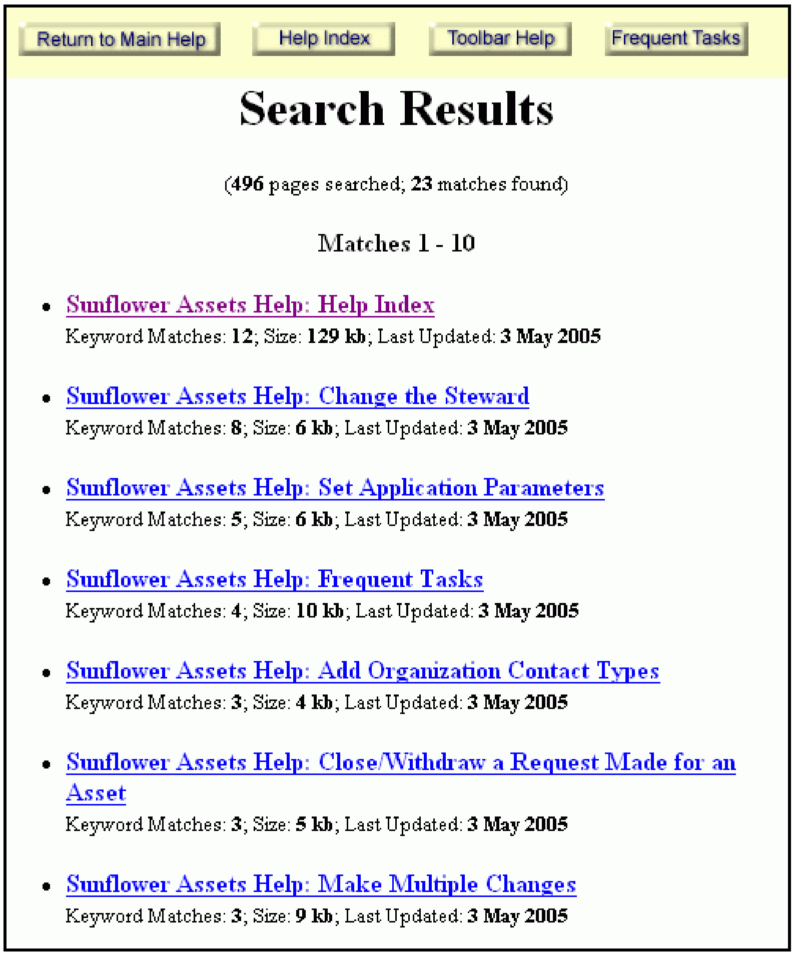
Step 4 Click the **Search** button.



NOTE: Example Search Results are displayed on the next page.

SEARCH RESULTS

Step 5 View the results of your search.


Return to Main Help | Help Index | Toolbar Help | Frequent Tasks

Search Results

(**496** pages searched; **23** matches found)

Matches 1 - 10

- Sunflower Assets Help: Help Index
  Keyword Matches: **12**; Size: **129 kb**; Last Updated: **3 May 2005**
- Sunflower Assets Help: Change the Steward
  Keyword Matches: **8**; Size: **6 kb**; Last Updated: **3 May 2005**
- Sunflower Assets Help: Set Application Parameters
  Keyword Matches: **5**; Size: **6 kb**; Last Updated: **3 May 2005**
- Sunflower Assets Help: Frequent Tasks
  Keyword Matches: **4**; Size: **10 kb**; Last Updated: **3 May 2005**
- Sunflower Assets Help: Add Organization Contact Types
  Keyword Matches: **3**; Size: **4 kb**; Last Updated: **3 May 2005**
- Sunflower Assets Help: Close/Withdraw a Request Made for an Asset
  Keyword Matches: **3**; Size: **5 kb**; Last Updated: **3 May 2005**
- Sunflower Assets Help: Make Multiple Changes
  Keyword Matches: **3**; Size: **9 kb**; Last Updated: **3 May 2005**

Step 6 You can select any of the hyperlinks to view information related to your search criteria.

ACCESS THE CUSTOMER CARE WEBSITE

Another means of accessing support is through the Sunflower Systems Customer Care website.

The Customer Care website provides:

- Sunflower User's Group information.
- Search (to search the Sunflower Website for desired information).
- Documentation (to access release notes, user guides, installation guides, samples, alerts, plus a glossary and FAQs).
- Downloads (to access product downloads and patches).
- Resource Links (to access documents, organizations, regulations, security, publications, and other property management related information).
- My Profile (to update your information in order to receive alert and product information).

NOTE: The Sunflower Systems **Customer Care** website is accessed via sunflowersystems.com.

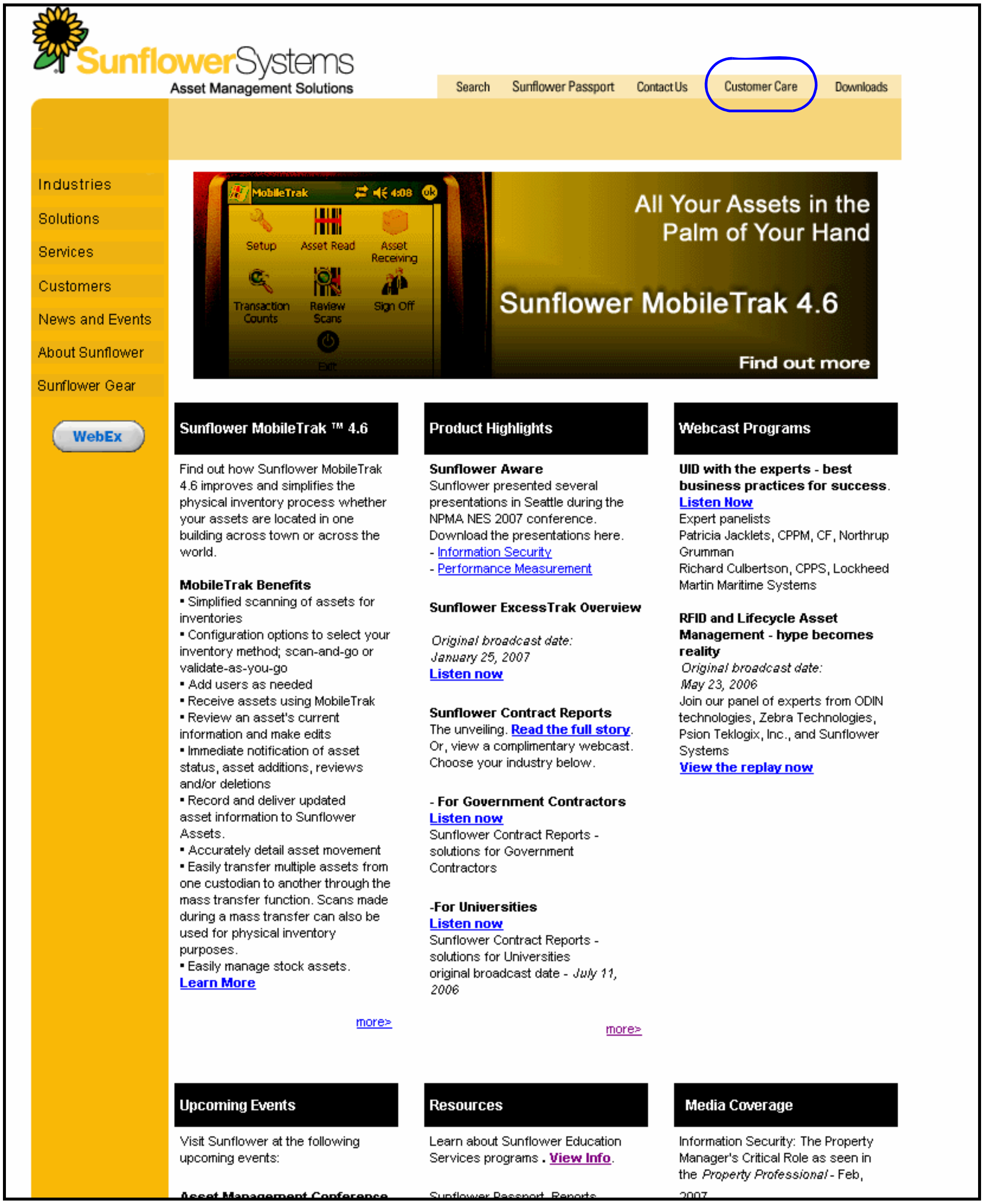


Figure 5-1: Sunflower Systems Home Web Site

ONLINE CUSTOMER CARE SUPPORT

Sunflower Systems online support gives you the tools to research and answer many of your questions through the Sunflower Systems Knowledge Base. Access the **Customer Care** Website by perform the following:

Step 1 Access the Sunflower Systems home page at the following web address with your browser, http://www.sunflowersystems.com/.

Step 2 Click the **Customer Care** link to access the Customer Care website login, http://www.sunflowersystems.com/j2ee/ccare/login/index.jsp.

Step 3 Enter your E-mail address and Password; and then click the **Enter** button.

NOTE: Only existing customers and Sunflower Systems employees may access the Customer Care Website. Enter your user name (email address) and password address and click the **Enter** button.
If you are unable to access the Customer Care Website, please contact your organization's Sunflower Enterprise System Administrator or Sunflower Systems Help at helpdesk@sunflowersystems.com.

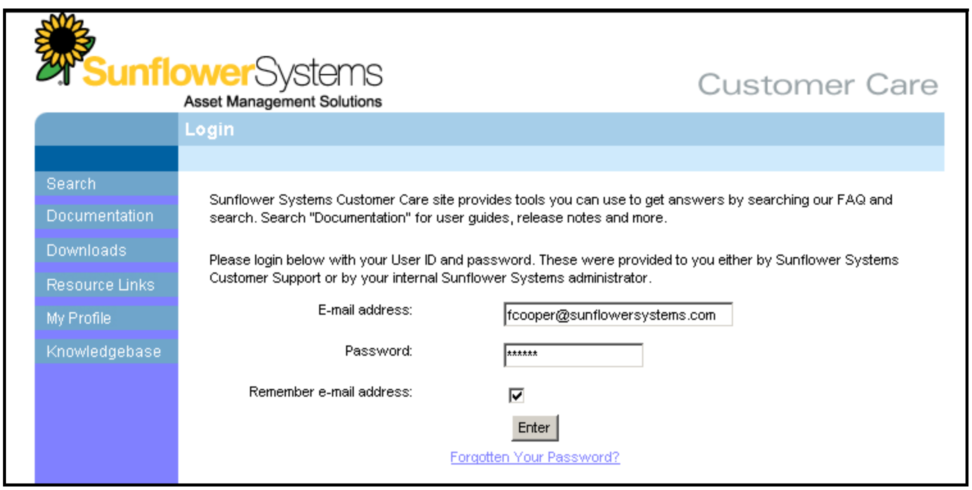


Figure 5-2: Sunflower Systems Customer Care Login Screen

If you are having any problems accessing the site, call Sunflower Systems Customer Support toll-free at **1-866-209-3516** or reach us by email at helpdesk@sunflowersystems.com.

Our Customer Care specialists are liaisons between users, product development, professional services, sales and marketing. Sunflower Systems depends on this communication flow to fully understand your needs and to ensure successful future product releases.

Sunflower Systems Users Group

The Sunflower Systems **Users Group** provides you with an opportunity to discuss common issues and resolutions that arise from the use of the Sunflower applications. Sunflower Systems supports the Users Group through participation in monthly teleconferences, quarterly web-based education-related updates, product updates, and subject matter expertise discussions.

We encourage all users of Sunflower Systems to join the Sunflower Systems Users Group in order to keep up-to-date and informed on the latest events. To participate in the Sunflower Systems User Group send your inquiries and feedback to **darbee3@llnl.gov**.

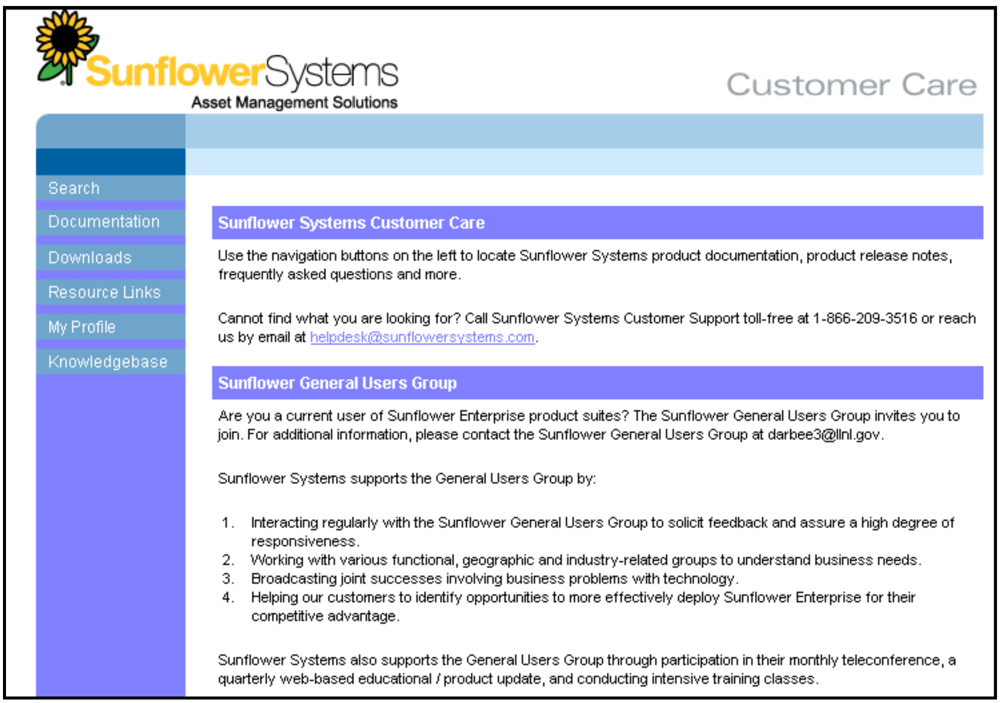


Figure 5-3: Sunflower Systems Customer Care & Users Group

Sunflower Systems Documentation

To access documents, select the **Documentation** (circled) topic on the Customer Care page and then click the link of the document that you want to view or download. Click the 'more' link for an expanded section view.

Figure 5-4: Sunflower Systems Customer Care Website Documentation Page

Click the desired **User Guides** link to and an Adobe Acrobat PDF version of the document will display for viewing, downloading, and/or printing.

After selecting the desired document, it will automatically open in Adobe Acrobat, as shown below.

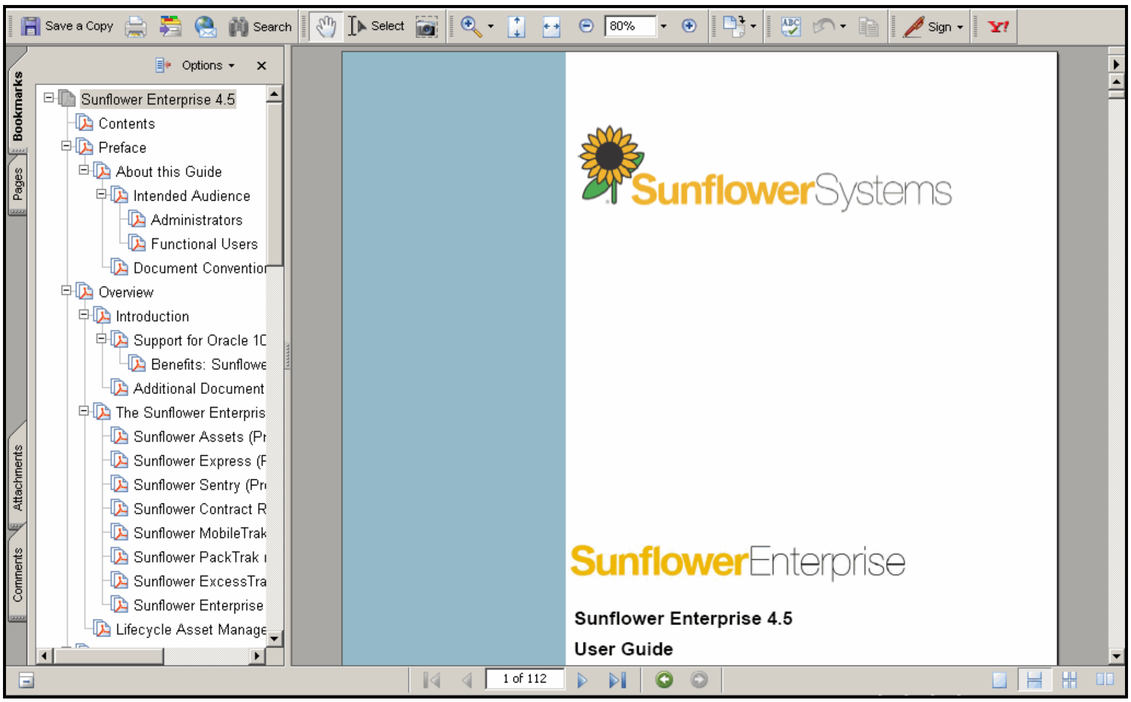


Figure 5-5: Adobe Acrobat PDF Document Download

You may then copy it to your computer (Save As) and/or print it out.

INSTALLATION GUIDES

You can also access Sunflower Systems installation guides to assist you with your implementation at the **Customer Care** website, under the **Documentation** link.

For example, to access the Sunflower Enterprise 4.5 Installation Guide from the Customer Care Website, perform the following:

Step 1 From the Customer Care Documentation page, click the Installation Guides hyperlink.

Step 2 Select the Sunflower Enterprise 4.5 Installation Guide link (Arrow).

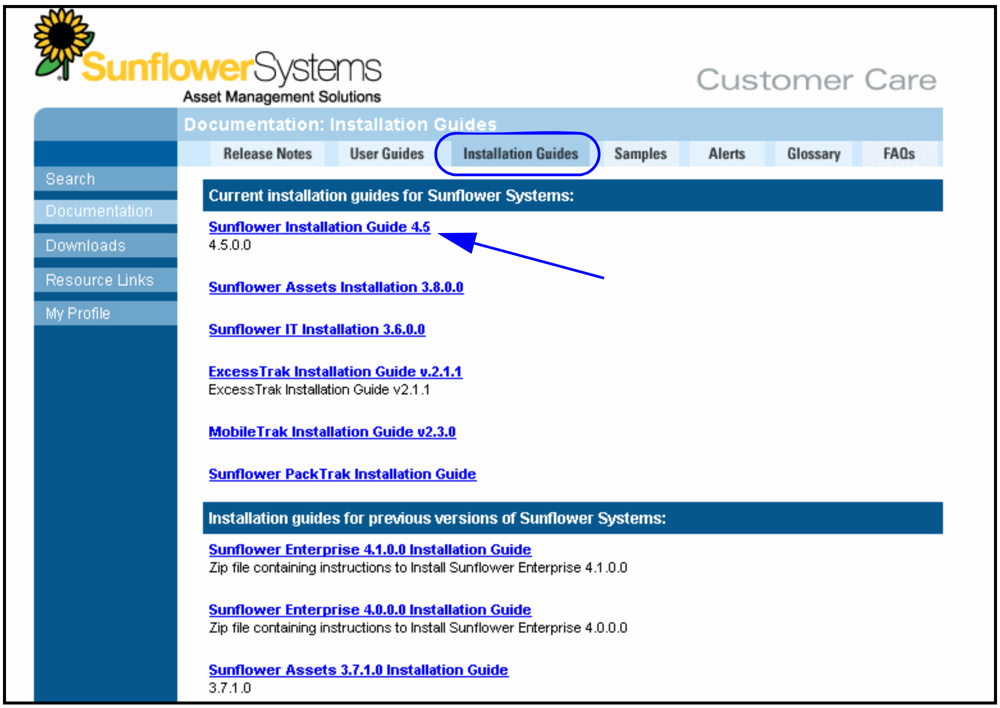
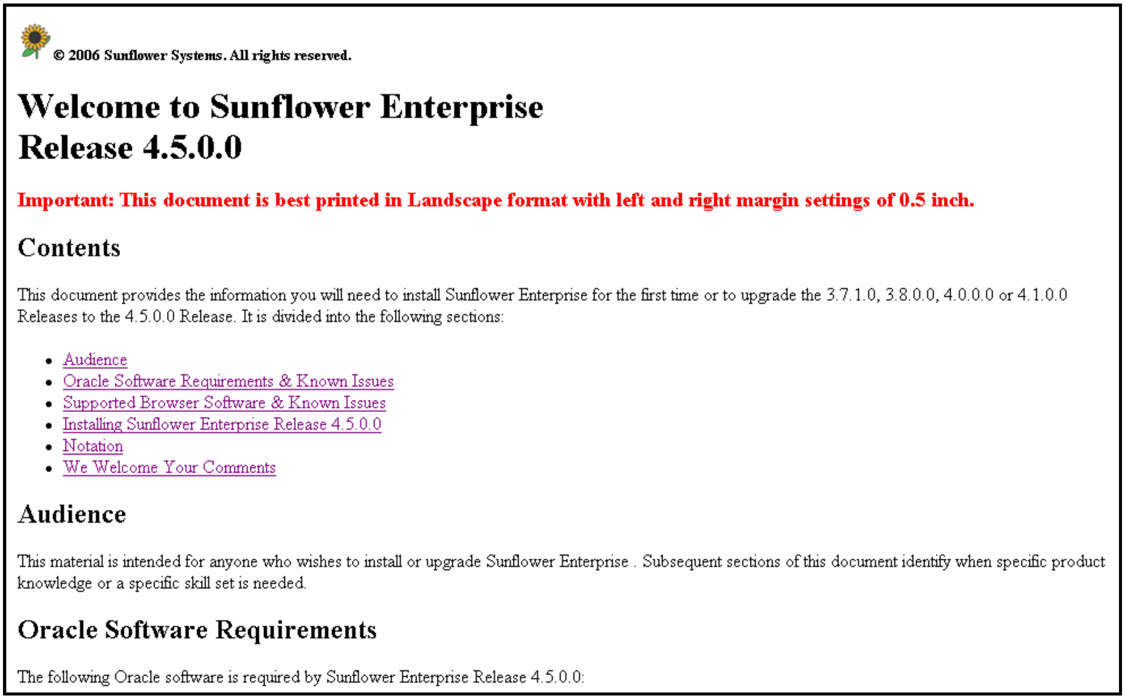


Figure 5-6: Sunflower Systems Customer Care Website Installation Guides

Step 3 View and/or save the Installation Guide onto your computer.



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Welcome to Sunflower Enterprise Release 4.5.0.0

Important: This document is best printed in Landscape format with left and right margin settings of 0.5 inch.

Contents

This document provides the information you will need to install Sunflower Enterprise for the first time or to upgrade the 3.7.1.0, 3.8.0.0, 4.0.0.0 or 4.1.0.0 Releases to the 4.5.0.0 Release. It is divided into the following sections:

Audience

This material is intended for anyone who wishes to install or upgrade Sunflower Enterprise . Subsequent sections of this document identify when specific product knowledge or a specific skill set is needed.

Oracle Software Requirements

The following Oracle software is required by Sunflower Enterprise Release 4.5.0.0:

Figure 5-7: Sunflower Systems Customer Care Website 4.5 Installation Guide

ALERTS

Another resource on the Customer Care Website is the Documentation **Alerts** page. Click on the **Alerts** link (circled) to view discussions and scripts that impact Sunflower Enterprise' users. Alerts contains information about product application work-arounds and scripts for optimizing Sunflower Enterprise.

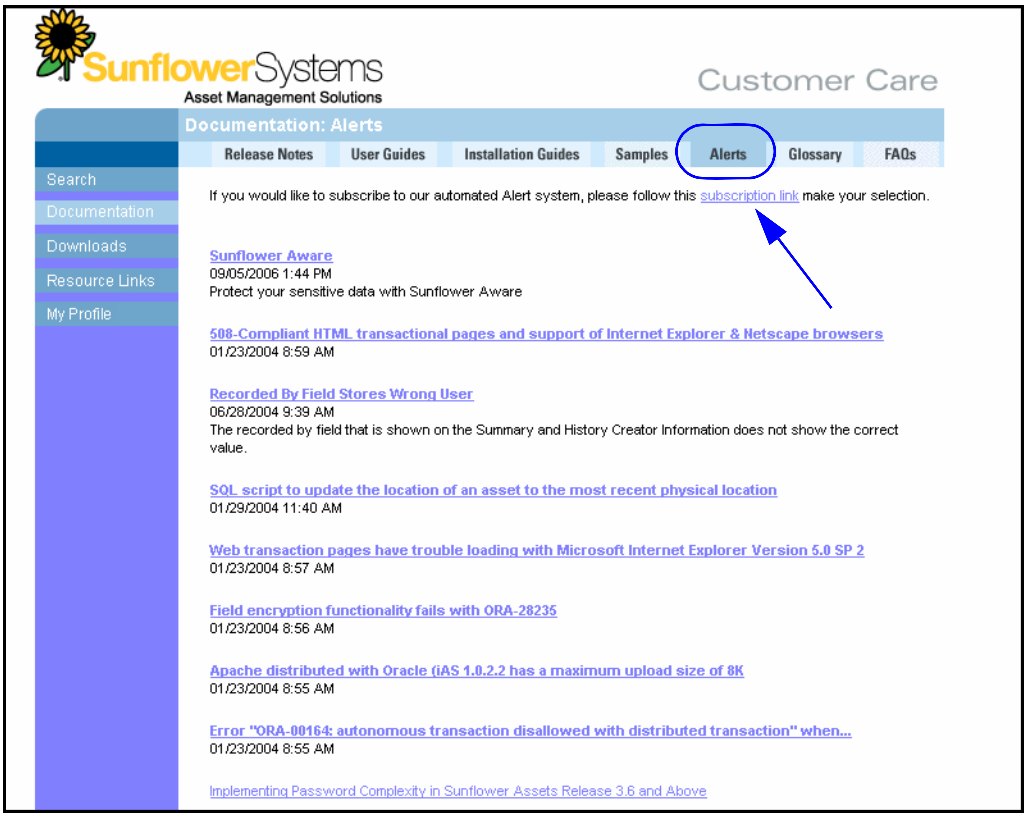

Figure 5-8: Documentation Alert Page

You can subscribe to the automated Alert system by clicking on the **subscription link** (arrow).

Select the alert categories of interest, as shown below.

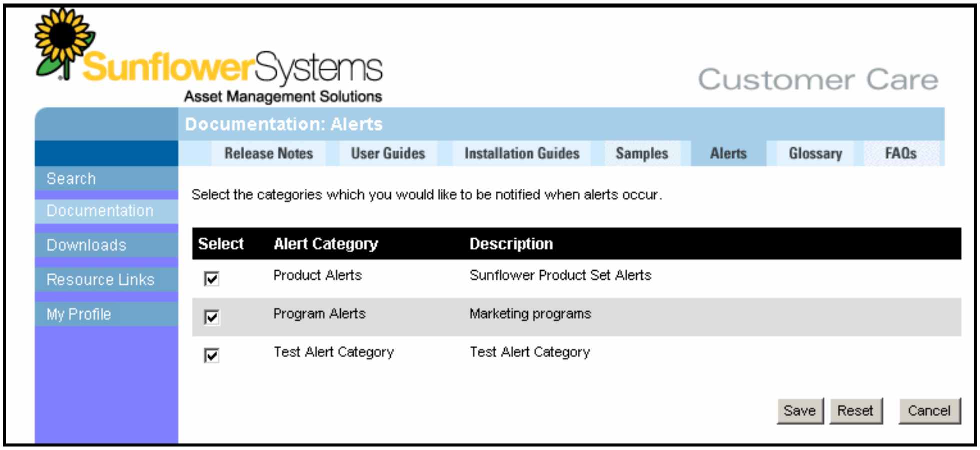

Figure 5-9: Documentation Alert Subscription Page

After selecting the desired alerts, click the **Save** button.

Note: You can always return to this screen and change your selections.

Product Downloads

You can use the **Product Download** resource on the Sunflower Systems Customer Care website to view and download the latest available product software and software patches.

Click the **Downloads** link (circled) to access the Sunflower Systems Product Downloads page where you can then select a desired hyperlink to begin the download process.

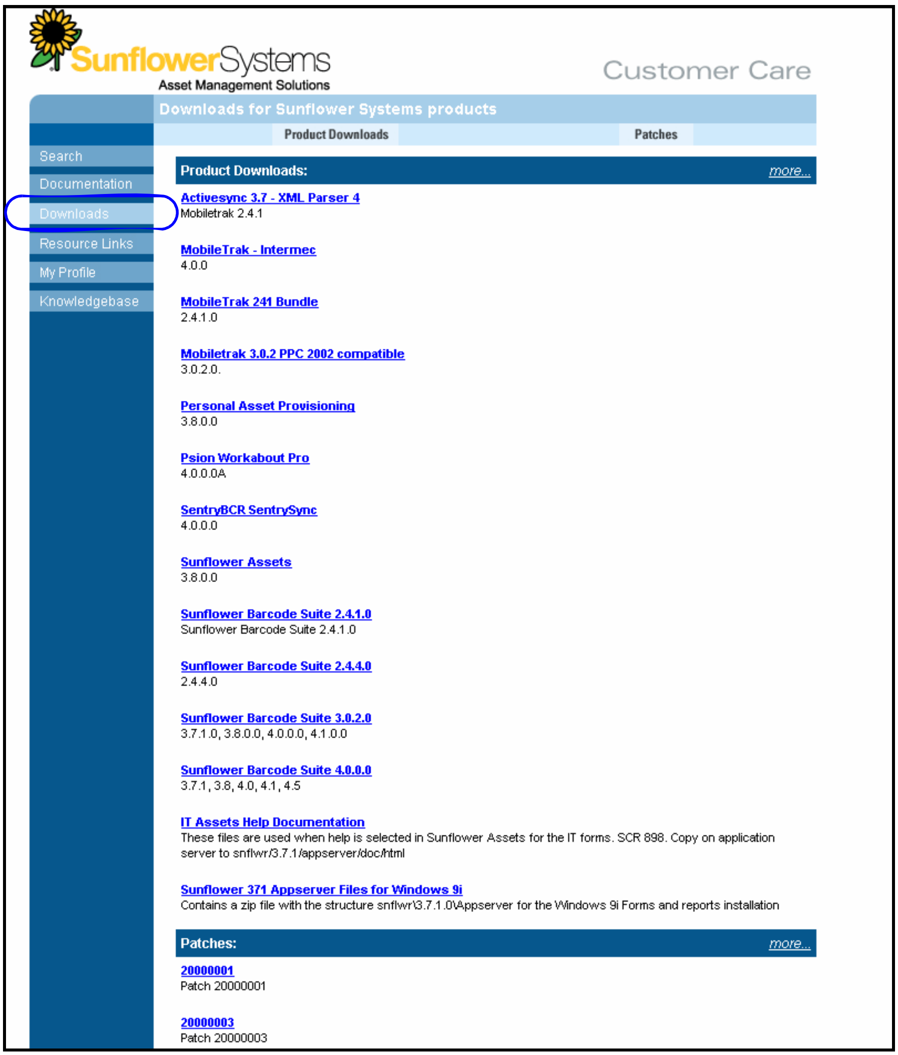

Figure 5-10: Sunflower Systems Customer Care Downloads Page

Resource Links

In addition to the resources available from the Sunflower Systems Customer Care Website, you can use the **Resource Links** page to find numerous internal and external documents of interest covering organizations, government, regulations, security, publications and other resources that affect or relate to the Property Management or Sunflower product offering.

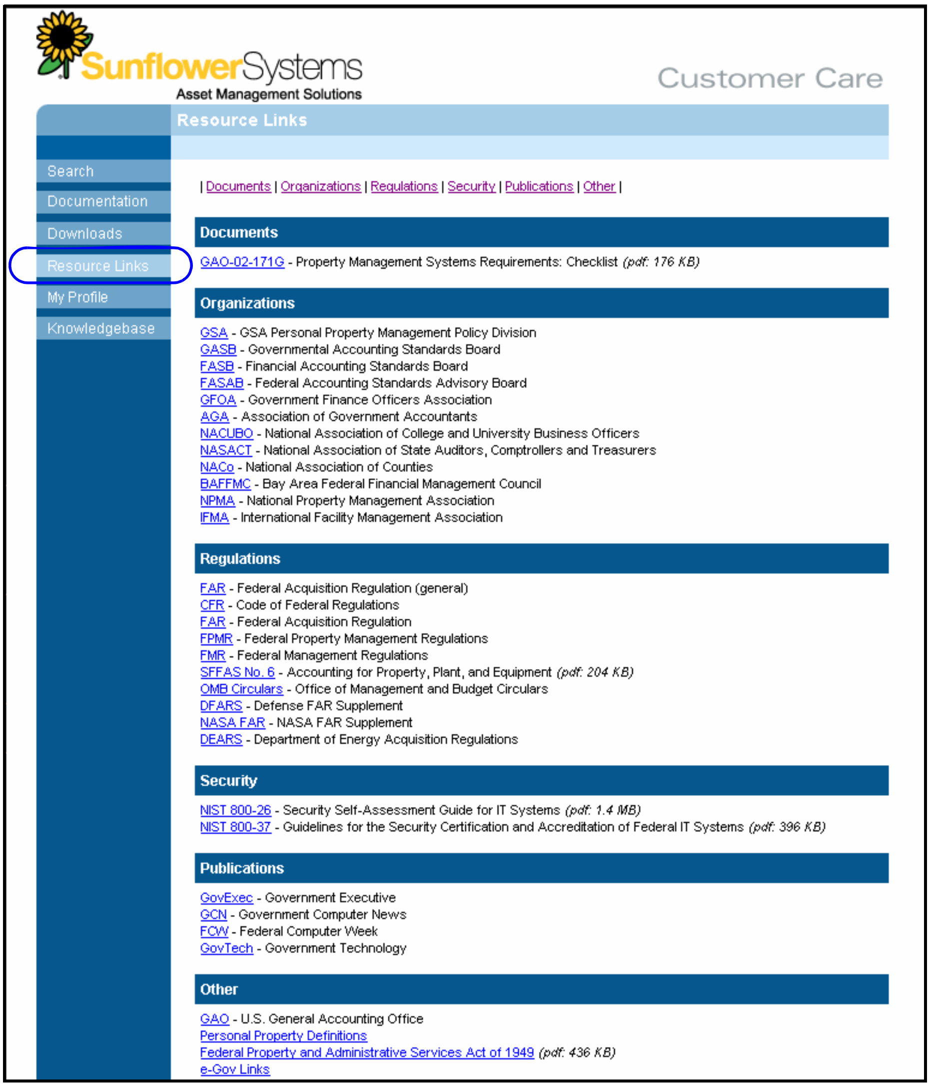

Figure 5-11: Resource Links Page

MY PROFILE

To keep in touch with the latest information and product application alerts, keep your contact information up-to-date with the **My Profile** page.

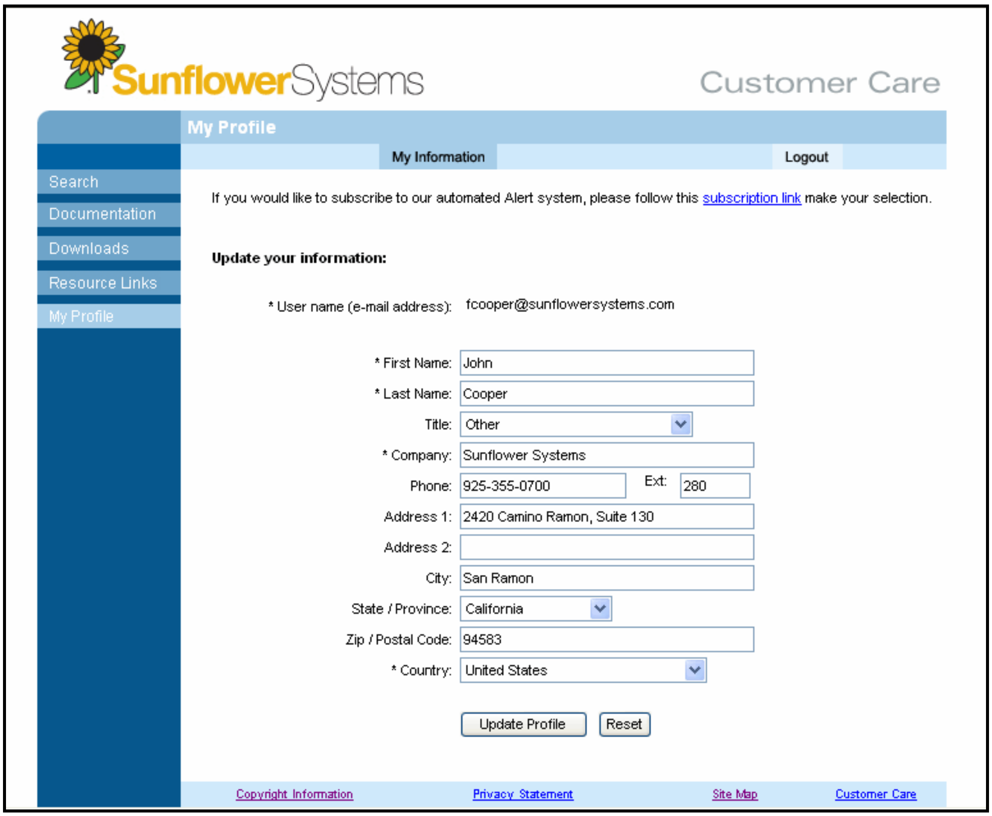

Figure 5-12: My Profile Page

ACCESS SUNFLOWER ACADEMY

Sunflower Academy™ courses are designed to maximize your valuable time and resources. Developed by education specialists with special expertise in adult learning concepts, focused sessions get to the details quickly with hands-on workshops and exercises.

From the Sunflower System Home Page select **Services > Education** to get an overview of the training programs offered at Sunflower Systems or email training@sunflowersystems.com.

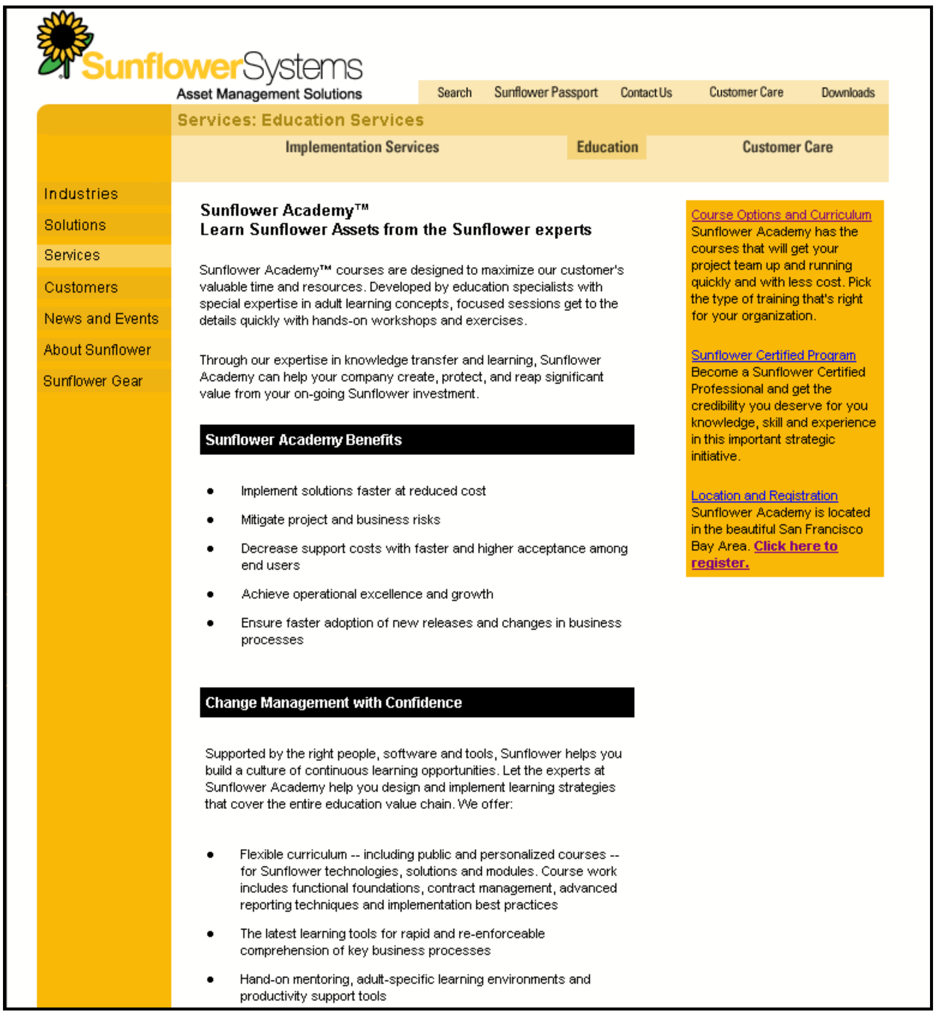

Figure 5-13: Education Services Page

SITE SURVEY AND UPGRADE SUPPORT SERVICES

Sunflower Systems offers comprehensive implementation services to assist enterprises when they make the move to a lifecycle asset management system. Critical factors for success include understanding the current business processes and defining objectives for the new system to ensure that the new lifecycle asset management system meets all of your enterprise's needs including management, finance, IT and your end-users.

More details can be found by clicking the **Services** link on the Sunflower System Home page and then click the **Systems Review** link to receive a comprehensive review that scopes and details the level of effort required to implement a lifecycle asset management system for your organization.

Figure 5-14: Implementation Services Page

Frequently Asked Questions

A

Use the following list of frequently asked questions (FAQ) to help you troubleshoot while using the MobileTrak 4.6 application.

- "Why are the locations of scanned assets not updated?"
- "Why do I not see the changes in Sunflower Assets?"

WHY ARE THE LOCATIONS OF SCANNED ASSETS NOT UPDATED?

The location for assets that are scanned will change only under the following circumstances:

- The scanner was set to “Resolutions with Updated Location” on the resolution screen
- The person who uploads the data has sufficient privilege to update the asset’s location

If the location is not updated due to an invalid location code, the user will be able to resolve the error through the Sunflower Assets Edit Interface Resolutions screen.

WHY DO I NOT SEE THE CHANGES IN SUNFLOWER ASSETS?

When an asset’s information is changed in the barcode scanner, the change will not be recorded in the database if any of the following are true:

- The barcode scanner operator does not have sufficient privilege to change the asset’s information
- The barcode scanner operator does not possess a role which enables the change to be captured or some other unexpected error occurs.

Changes that are not successfully captured can be reviewed via the Edit Inventory Assets Interface Records Screen on the Management, Agreements, Finance, Inactive, Excess, or Review menus of the Sunflower Assets application. Each change and addition can be corrected if necessary and then re-processed by a user with the appropriate privileges.

COMMON SYNCLINK ERROR MESSAGES

B

The following list identifies and addresses common error messages that are related to the SyncLink application. Use this list to help you troubleshoot while using SyncLink.

- "The remote server has been paused or is in the process of being started"
- "SyncLink is already running"
- "Unable to parse Sequence ID – A string literal was expected, but no opening quote character was found"
- "Error in Form_Load : Error number = ActiveX component can't create object (429)"
- "Create File Error 5 occurred copying <filename> Access is denied"
- "The system cannot find the file specified"

The remote server has been paused or is in the process of being started

Explanation: SyncLink was unable to communicate with the bar code scanner. This is usually caused by trying to send files to the scanner while MobileTrak is running.

Solution: Close MobileTrak and try again.

SyncLink is already running

Explanation: Another instance of SyncLink is already running on your PC. You can only run a single instance of SyncLink at any given time.

Solution: Check if you have SyncLink open on your desktop. If you don't have SyncLink open and are still getting this message, check in the Windows Task Manager to determine if there is a SyncLink process, terminate it and retry.

Unable to parse Sequence ID – A string literal was expected, but no opening quote character was found

Explanation: When uploading data, SyncLink requests a sequence ID from your server through an HTTP (Web) connection. You will see this error if SyncLink cannot establish a connection to the web server or the response from the server is malformed.

Solution: Open your SyncLink.xml configuration file in a text editor and check whether the upload_download_url parameter is correct by pointing your browser at the UR formed by the value of the upload_download_url parameter + "as_owa_barcode.main".

Error in Form_Load : Error number = ActiveX component can't create object (429)

Explanation: One or more of the ActiveX components required by SyncLink is not installed or is corrupted.

Solution: Re-install and setup SyncLink as described in Chapter 2 of the installation guide.

CREATE FILE ERROR 5 OCCURRED COPYING <FILENAME> ACCESS IS DENIED

Explanation: SyncLink was unable to overwrite the file <filename> in the bar code scanner because the file is currently in use.

Solution: Make sure that MobileTrak is not running and try again.

THE SYSTEM CANNOT FIND THE FILE SPECIFIED

Explanation: SyncLink was unable to overwrite Scanref.odb in the bar code scanner. because the file is currently in use.

Solution: Make sure that MobileTrak is not running and try again.

C

REPORTS

This appendix provides a list of the delivered reports that are available in the Sunflower Enterprise modules covered within this guide. A brief description of each report is provided. The following reports are alphabetically listed, either by module or function:

- Management Reports
- Review (Physical Inventory) Reports
- Barcode Reports

Management Reports

Report	Description/Explanation
ASMN6010 Inventory Assets Pending Release by Age	Shows a summary of accountable assets pending release to the initial custodian by age and steward.
ASMN6020 Inventory Assets Pending Acceptance by Age	Shows a summary of assets awaiting acceptance by age and steward.
ASMN6030 Inventory Assets (Global Information)	Shows detail and summary information of accountable assets.
ASMN6040 Inventory Assets with Requests	Shows accountable assets with open change steward, custodian, user and location requests.
ASMN6050 Inventory Assets with Recently Denied Requests	Shows accountable assets with denied change steward, custodian, user and location requests.
ASMN6060 Inventory Asset History	Shows the detailed changes, and who made them, for accountable assets.
ASMN6070 Inventory Asset Final Events	Shows the details of accountable asset final events, e.g. loss, abandonment and transfer out.
ASMN6075 Inventory Asset Initial Events	Shows the details of accountable asset initial events, e.g. purchase, construction and transfer in.
ASMN6076 Inventory Asset Ongoing Events	Shows detailed information for ongoing events, e.g. maintenance, repairs and mileage captured, for accountable assets for a time period.
ASMN6090 Inventory Asset Interface Processing Results	Shows the results of processing the contents of interface table as_load_inventory_assets.
ASMN6095 High Volume Shipping Interface Processing Results	Shows the Bar Code interface processing results.
ASMN6120 Asset Search	Searches the asset repository for assets matching a description, manufacturer or model; used for asset review.
ASMN6130 Inventory Asset Summary by Asset Flag	Summarizes accountable asset value and count by asset flag.
ASMN6140 Inventory Asset Activity Summary by Asset Flag	Shows the details of accountable asset activity grouped by asset flag.
ASMN6150 Inventory Asset Utilization	Shows the percentage utilization for inventory assets in a time period.
ASMN6160 Inventory Asset Summary by Asset Type	Summarizes accountable asset value and count by asset type.
ASMN6170 Inventory Asset Activity Summary by Asset Type	Shows the details of accountable asset activity by asset type.
ASMN6180 Asset Structure	Shows parent/child relationships between assets.
ASMN6190 Inventory Asset Timeline	Shows timeline activities by asset Identifier.
ASPO6010 Purchase Order Aging Report	Shows detailed information of outstanding purchases orders requiring receipt and tagging of property.

Review (Physical Inventory) Reports

Report	Description/Explanation
ASRV6010 Review Campaign Base Assets	Shows the details of review campaign base assets, by review type, e.g. open, barcode scan and barcode key, for a selected set of review campaigns.
ASRV6020 Review Campaign Properties	Shows the properties, i.e. baseline criteria, allowed resolution and salient dates, for a selected review campaign.
ASRV6030 Review Resolution Summary	Shows a summary of physical inventory results, by review type and person for a selected set of review campaigns.
ASRV6040 Review Campaign Base Assets with Resolution Information	Shows assets subject to an ongoing review with detailed resolution information; also provides for hand-written capture of changes to asset steward, custodian, user or location.
ASRV6050 Executive Review Resolution Summary	Shows percentage found, open and declared unaccounted, for a selected set of review campaigns.
ASRV6060 Review Resolution Summary by Person	Shows a summary, by resolution type and person, of resolutions captured for a selected set of review campaigns.
ASRV6070 Current Resolutions at Different Location than Asset	Shows assets whose last physical inventory review occurred at a different location than the location of the asset record.
ASRV6080 Review Accruals	Shows untagged assets found, and lost assets recovered, for a selected set of review campaigns.
ASRV6090 Resolution Interface Processing Results	Shows the results of processing the contents of interface table as_load_resolution_assets.
ASRV6100 Base Asset Interface Processing Results	Shows the results of processing the contents of interface table as_load_base_assets, a mechanism which is used to load review baselines from files.

Barcode Reports

Report	Description/Explanation
ASMN6200 BCR Upload Differences Detail By Asset	Shows the barcode data by asset that contains errors from your scanner upload. Displays the data for all barcode related fields in a side-by-side column format, which allows you to compare the Old (current Sunflower database) values with the New (barcode recorded) values.
ASMN6210 Updates Made Through Inventory	Shows a history of changes made to assets through the barcode scanner process. You can either run the report for an individual asset or for a number of uploads over a giver period of time.

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