

PDA Webinar Series

Part 2

SnapTracker Webinar Wenesday

May 18, 2016

Meet your presenters



Marcin Ortel

Field Services Specialist



Yishi Pan

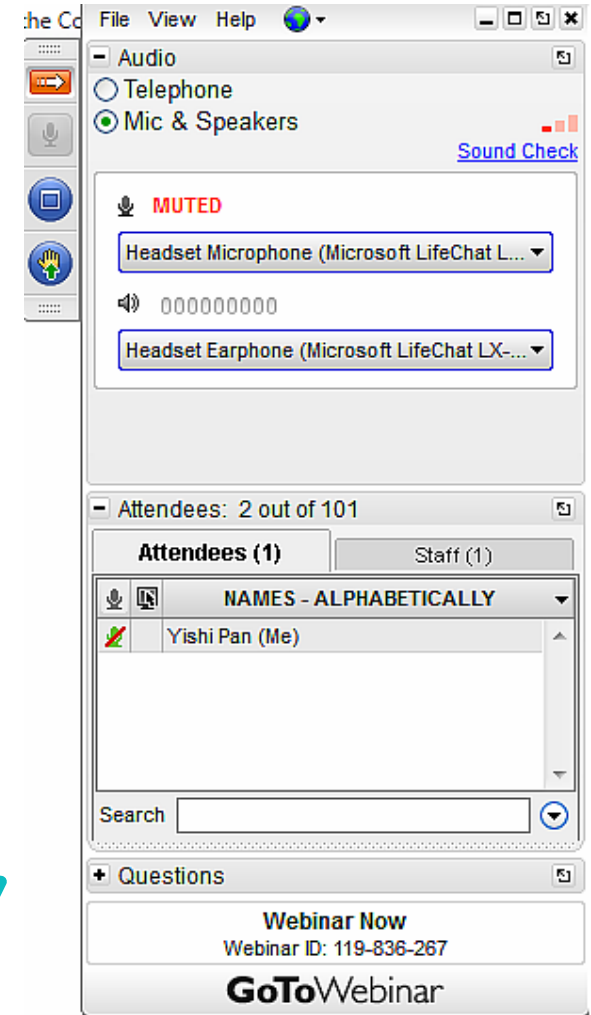
Jr. Product Manager

How to interact today?

Let us know if you
have any question
throughout the
webinar!



Type your comments
and questions here
anytime!



Agenda

01

Settings

Discuss initial settings
Setting up routines

02

Transactions

Types of movements
Discuss Asset vs. Like items
Admin. transactions

03

Q&A

PDA Webinar Series

PART 1

PDA Overview

PART 2

Transaction on the PDA

PART 3

Batch Processing & Error Fixing



Settings

- Initial Settings
- Set up routines

Initial Settings

SnapTracker 2:03

Initial Settings

Date 5/17/2016

Time 2:03:28 PM

Operator

☒ Use KiSP Label

- Serial No Length

☒ Validate Label Sequence

☐ Auto Increment

☒ Enable Record Editing

☐ International Date Format

Connection Settings...

Connected on ActiveSync(USB)

Reference to Date & Time - it is the transaction date

Set the default character limit for the Serial Number

*ADVANCED function - when enabled, will auto-populate next bar code in sequence

Set the date to: DD/MM/YY

Text field - specify individual who's performing the transactions on the PDA

When enabled, will notify operator that the bar code scanned is out of sequence

Allows to edit a completed transaction

PDA Routines

AA: Add Asset Item

AL: Add Like Item

TA: Transfer Asset Item

TL: Transfer Like Item

DA: Deliver Asset Item

DL: Deliver Like Item

WO: Deliver via Work Order Ticket

Movement Transaction

TA: Mass Asset Add

CA: Change Standard - Asset ONLY

NS: Issue New Serial Number

OA: Change Condition - Asset Item

OL: Change Condition - Like Item

Admin Transaction

Tip: You can save one routine per transaction type!

✓ Avoid having to enable routines for each new scanning session.

Data Identifier

Field to be scanned	Data Identifier
Customer No.	7V
Standard	20P
To Building	12B
To Location	2L
To Condition	11Y
Cost Center	11V
WOT No.	12S
WOT Line	12V
Ticket ID	12T

Tip: This information is available in the Training Manual in appendix D-1

Field Name Setting

P = Prompt

When taking inventory, it's a mandatory field.

D = Defaults

When taking inventory, this field will be automatically entered.

E = Exclude

When selected you are not prompted for this data field when taking an inventory or entering defaults.

T = Toggle

Enable the PDA operator to selectively decide during the collection cycle which data field's information will or will not be captured for the individual item.

Transaction Exercise

Sample Work Order Ticket (WOT)



Onsite Solutions
143 Whitgrove Dr.
Toronto, ON, M2H 6H9

5/17/2016

WORK ORDER PICKING LIST

Work Order No. :	53	Company :	Z
Export Order No. :		Customer :	BAR001
Cus. Ref. No. :	PO192830A	Proj. Ref. No. :	R2716276
Cus. Req. Date :	05-20-2016	WOT Date :	05-17-2016

Destination Indicator : Delivery

WOT No. : 18



Ticket ID : G3



Ticket Line : 1



Order Line : 1

Sequence No. : 1A

Standard : TBO0001

~
~ATOP
QTM
~
~ALEG
TU2
~
~
~

Elliptical Shape - Sculpted Base-Self Edge - 44D x 84W x 29H, ALBA TABLES

High Performance Thermally Fused Laminate (STD)

Abla Table Top Finishes

1-Quartered Mahogany

Table 1 Piece (STD)

Alba Table Leg Finishes

2-Tungsten

Grommet/Electrical Not Required - Left Position

Grommet/Electrical Not Required - Center Position

Grommet/Electrical Not Required - Right Position

Grommet/Electrical Not Required - Custom Grommet Location

Catalog No. : GEL7S

Allocation Type : A



Building	Location	Condition	Quantity
ZWHSE01	G0120	FAIR	1.00

Quantity : 1.00



Sequence No. : 2A

Standard : ETR0011

MT

*Fin End,Chg-Of-Ht,Panel/Conn

*MEDIUM TONE

Catalog No. : AO259.

Serial Number : ETR0011



Allocation Type : L



From Building : ZWHSE01



Summary : PDA Webinar -Part 2

1. Initial Settings

- Referencing date and time - important to ensure accuracy of date.
- Always put in the Operator who's doing the transaction - create visibility and able to follow up if inquiry occurs.
- Benefits of using KiSP bar codes
- Enable auto-increments - will populate next serial number(ADVANCED function)
- Edit transactions - give users opportunities to go into previous PDA scan records to make changes (i.e. fix mistakes)
- Suggest leave International date format off - keep the "MM/DD/YY"

2. Transactions

- 4 common types of movements: Adding, Transferring, Delivering and Delivering via WOT - how asset and like items are handled differently
- Mass Asset Add - max. 50 serial numbers; must be in same condition & to the same location
- Admin transaction: Change serial number, Change Stanadard, Change Conditions

Q&A

Upcoming Webinar :

"PDA Part 3"

Presenter: Marcin Ortel
Wednesday, June 1, 14:00 (EST)

A modern office interior with large windows, white columns, and a grid ceiling. The floor is covered with a pattern of square tiles.

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**See you at our next
Webinar Wednesday!**