

TEKLYNX®

# BACKTRACK®

RemoteLink

VERSION 2.0

SETTING THE STANDARD



U S E R ' S G U I D E



# User's Guide

The information in this manual is not binding and may be modified without prior notice.

Supply of the software described in this manual is subject to a user license. The software may not be used, copied or reproduced on any medium whatsoever, except in accordance with this license.

No portion of this manual may be copied, reproduced or transmitted by any means whatsoever, for purposes other than the personal use of the buyer, unless written permission is obtained from Teklynx Newco S.A.S.

© 2013 Teklynx Newco S.A.S  
All rights reserved.

# Table of Contents

---

<b>Chapter 1: Getting Started . . . . .</b>	<b>1-1</b>
Overview . . . . .	1-1
BACKTRACK RemoteLink Main Menu Options . . . . .	1-1
Initializing the BACKTRACK RemoteLink & BACKTRACK Programs . . . . .	1-3
BACKTRACK RemoteLink Program Initialization . . . . .	1-3
BACKTRACK Program Initialization . . . . .	1-6
<b>Chapter 2: Transferring the PDT Application . . . . .</b>	<b>2-1</b>
Creating the PDT Application Programming File . . . . .	2-1
Importing the PDT Application Programming File . . . . .	2-4
<b>Chapter 3: BACKTRACK RemoteLink PDT Functions . . . . .</b>	<b>3-1</b>
One-Time PDT Firmware Programming . . . . .	3-1
PDT Application Programming . . . . .	3-2
Using the PDT Main Menu . . . . .	3-4
PDT Data Retrieval . . . . .	3-8
<b>Chapter 4: Exporting Retrieved Data . . . . .</b>	<b>4-1</b>
Importing the Remote Data File into the BACKTRACK Program . . . . .	4-2

# Getting Started



---

## Overview

BACKTRACK RemoteLink, an add-on module to BACKTRACK asset and inventory tracking software, enables portable data terminal (PDT) users to update BACKTRACK files via a high speed Internet connection or a local area network without having a direct connection to the main database. BACKTRACK RemoteLink takes batched PDT information and packages it into a file that can be sent electronically via e-mail or FTP.

BACKTRACK RemoteLink is ideal for organizations that have remote offices, route drivers or salespeople who collect information during the day and need to update the central BACKTRACK database at the end of the day.

The BACKTRACK RemoteLink module runs as a stand-alone program. The software includes one portable data terminal (PDT) license. Additional PDT licenses can be purchased and installed into the RemoteLink program directory. (To find out how many PDT licenses are installed, click the **Help** menu and select **About**.)

## BACKTRACK RemoteLink Main Menu Options

### Note

If buttons on the main menu appear “grayed out” and are not available for selection, this simply means that the button’s function has not yet been activated. The buttons will be activated and available for selection once the necessary initialization and PDT programming activities have been performed.



- **PDT Data Retrieval:** Allows you to transfer the PDT transaction records from the PDT into BACKTRACK RemoteLink so they can be transferred back to the main BACKTRACK program at a later time. (See page 3-8 for more information on the PDT Data Retrieval function)
- **PDT Application Programming:** Allows you to program the PDT to remotely perform Check Out/Take Out, Check In/Restock, Move, Add Items, and Physical Inventory transactions in BACKTRACK RemoteLink. (See page 3-2 for more information on the PDT Application Programming functions.)
- **One-Time PDT Firmware Program:** This function is necessary to set up the PDT firmware to receive the PDT application program from the BACKTRACK RemoteLink program. This function sends the information that was received from the main BACKTRACK program to the PDT. (See page 3-1 for more information on the One-Time Firmware Program functions.)
- **Import PDT Programming File:** Allows you to take the applications that the PDT will use and import them from the main BACKTRACK program to the BACKTRACK RemoteLink site. (See page 2-4 for more information on the Import PDT Programming File functions.)
- **Export Retrieved Data:** Allows you to export the retrieved PDT data to a file to be sent to the main BACKTRACK program to update the master file. (See page 4-1 for more information on the Export Retrieved Data functions.)
- **Export Archived Retrieved Data:** Allows you to send the history of PDT retrievals from the BACKTRACK RemoteLink site (up to 10 retrievals are saved). This allows exported data to be resent if one of the retrieved data files gets destroyed or lost during transmission to the main BACKTRACK program.
- **Initialize/Re-Initialize Site:** Allows you to create the link between the main BACKTRACK program and the BACKTRACK RemoteLink site so that you are able to send PDT retrieved data to the main BACKTRACK program. The first time you start BACKTRACK RemoteLink you need to initialize the site. You also have the ability to re-establish that link if needed.



# Initializing the BACKTRACK RemoteLink & BACKTRACK Programs

In order for the BACKTRACK RemoteLink module to work with BACKTRACK, you must first “initialize” both the BACKTRACK RemoteLink program (installed at a remote site) and the main BACKTRACK program.

## Note

It is only necessary to go through the initialization process once, when BACKTRACK RemoteLink is first installed.

## BACKTRACK RemoteLink Program Initialization

- 1 From the remote location where BACKTRACK RemoteLink is installed, click the **Start** button on the Windows task bar and move the cursor up list to Programs. Select the **BACKTRACK RemoteLink** program group (or whatever name you gave to the program group when you installed it) and then select *BACKTRACK RemoteLink* again to start the program. The Initialize dialog box appears.

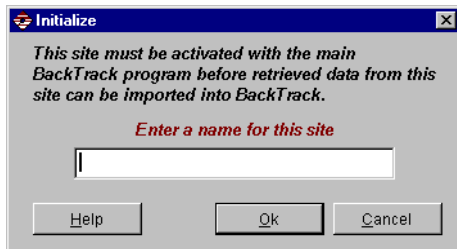
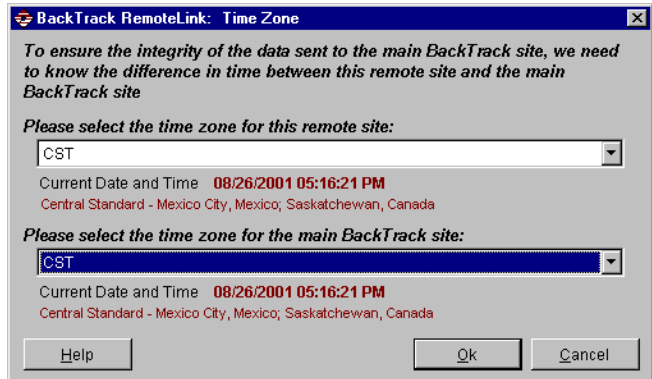


Figure 1-1 Initialize Program

## Note

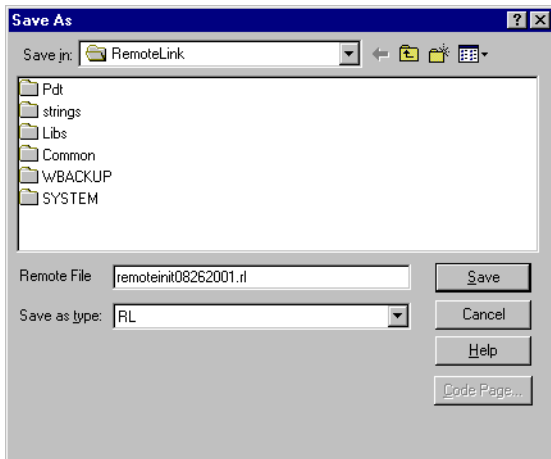
The Initialize dialog box will only appear the first time you start BACKTRACK RemoteLink. Thereafter, the BACKTRACK RemoteLink main menu screen display upon start up of the program.

- The Initialize dialog box allows you to identify the remote location with a name so that the main BACKTRACK program can retrieve data from this remote site. Type in the name of your site and click **OK** to continue. The BACKTRACK RemoteLink: Time Zone dialog box appears.



**Figure 1-2** Set Time Zones

- Select the appropriate time zones and then click **OK** to continue. The Save As dialog box appears.



**Figure 1-3** Save Initialization File

- 4 One file will be created. The default name is remoteinit<date>.rl. Write down the name and location of the saved file, as you will be sending this file to the main BACKTRACK site to initialize the remote site location. Click the **Save** button.
- 5 A dialog box will appear to ask whether you would like to protect this file with a password. To enable password protection and encryption on the file, click **Yes** and enter your password. To continue without a password click **No**.
- 6 A dialog box will appear to notify you that the initialization transfer file has been successfully created. Click **OK**.
- 7 Electronically send the initialization transfer file to the main BACKTRACK program. You can use any means for transfer that you would use to transfer any electronic file (i.e., email attachment, FTP file, floppy disk).

## BACKTRACK Program Initialization

Once you have created the initialization file in the BACKTRACK RemoteLink program and you have sent the electronic file, you then need to import that file into the main BACKTRACK program to establish the necessary link to the BACKTRACK RemoteLink program.

- 1 In the main BACKTRACK program, click the **Start** button on the Windows task bar and move the cursor up the list to Programs. Select the **BACKTRACK** program group (or whatever name you gave to the program group when you installed it) and then select **BACKTRACK** again to start the program. The BACKTRACK Main Menu appears.
- 2 In the Database Maintenance module, click on the **Administration Functions** button, then select **PDT Functions**, and then click the **RemoteLink Functions** button. The RemoteLink Functions dialog box appears.

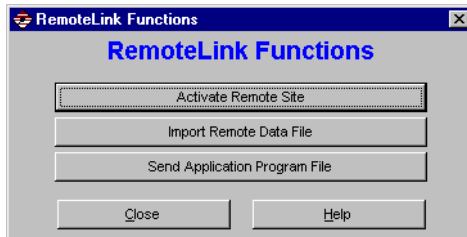


Figure 1-4 RemoteLink Functions

- 3 Select the **Activate Remote Site** button. The Open dialog box appears.

### Note

The "remoteinil08262001.rl" file name is for example only. The file you select will be the one that was sent from the BACKTRACK RemoteLink site.

- 4 Locate and highlight the "remoteinit<date>.rl" file that was created when you initialized the remote site. Click **OK**.

- 5 Enter the password if the "remoteinit<date>.rl" file has a password and click **OK**.
- 6 Once this file is imported, you will receive a notice that the remote site has been activated and you can now import data that has been retrieved at this site after programming the BACKTRACK applications. Click **OK** to return to BACKTRACK RemoteLink Functions dialog box.
- 7 The next step is to create a PDT application program file from the main BACKTRACK program to send to the remote site. Once the remote site imports the PDT Programming File from the main BACKTRACK program, the BACKTRACK RemoteLink program will be fully functional.

# Transferring the PDT Application



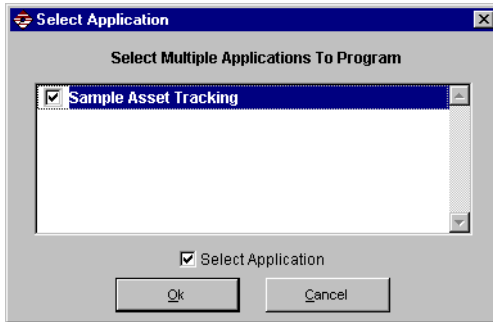
---

## Creating the PDT Application Programming File

Once the main BACKTRACK program has established the link to the remote site, you will need to generate the PDT application programming file for the BACKTRACK RemoteLink program. This step is performed in the main BACKTRACK program.

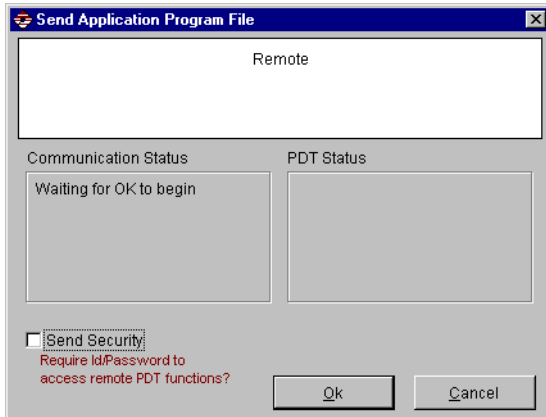
- 1 Open the main BACKTRACK program.
- 2 From the Database Maintenance Module, click on the **PDT Functions** button, select the **RemoteLink Functions** button and then click on the **Send Application Program File** button. The Select Application dialog appears.





**Figure 2-1** Select Applications to Transfer

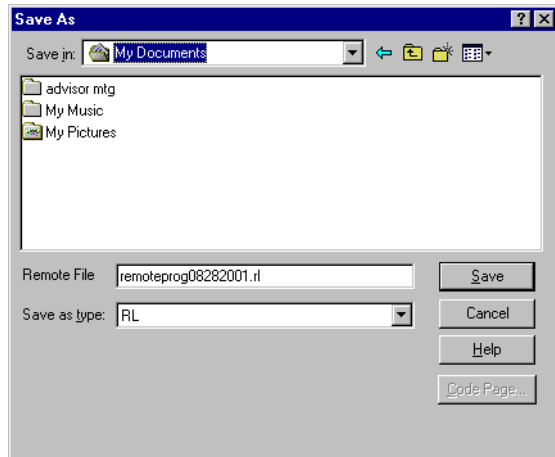
- 3 Select up to five applications to transfer and click **OK**. A check next to the application will indicate which applications are sent to the BACKTRACK RemoteLink application program created. The Send Application Program File dialog appears.



**Figure 2-2** Send Application Program File



- 4 If you would like to send the PDT password protection settings for each PDT Function, check the **Send Security** option when you create the Application Program File.
- 5 Click **OK** on the Send Application Program File dialog to create the file that will be sent to the BACKTRACK RemoteLink program. The Save As dialog appears.



**Figure 2-3** Save Application Program File

- 6 One file will be created. The default name is remoteprog<data>.rl. Write down the name and location of the saved file, as you will be sending this file to the BACKTRACK RemoteLink site to import these applications.
- 7 To enable password protection and encryption on the file, click **Yes** and enter your password. To continue without a password click **No**.
- 8 A dialog will appear to notify you that the Remote PDT Programming file has been successfully created. Click **OK** to return to the RemoteLink Functions dialog.

## Importing the PDT Application Programming File

After you create the PDT application programming file in the main BACKTRACK program and send it to the remote site, you will need to import that file into the BACKTRACK RemoteLink program. The applications you use on the BACKTRACK RemoteLink site must come from the main BACKTRACK program and all data captured by the PDTs needs to be sent back to the same BACKTRACK program.

- 1 From the main menu of the BACKTRACK RemoteLink program, click the **Import PDT Programming File** button. The Open dialog appears.
- 2 Locate and highlight the "remoteprog<date>.rl" file that was created when you programmed applications for the remote site. Click **OK** to continue. (Remember that the name may be different than the one in the example.)
- 3 Enter the password if the "remoteinit<date>.rl" file has a password and click **OK** to continue.
- 4 Once this file is imported, you will receive a notice that the PDT Programming File imported successfully. Click **OK** to return to BACKTRACK RemoteLink main menu.

# BACKTRACK RemoteLink PDT Functions



---

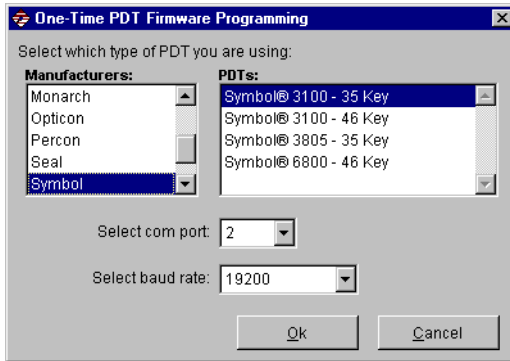
The BACKTRACK RemoteLink PDT Functions are for use with BACKTRACK's supported portable data terminals (PDTs). They allow you to perform BACKTRACK's Check Out/Take Out, Check In/Restock, Move, Add Items, and carry out Physical Inventory functions – wherever you are.

BACKTRACK makes it easy for you to integrate PDTs into your tracking solution by including pre-programmed settings for each model of supported PDT. The first thing you need to do is to specify your PDT make and model using the One-Time PDT Firmware Programming steps. Specifically, you will want to go through the BACKTRACK RemoteLink PDT functions in this order:

- 1 One-time PDT firmware programming
- 2 PDT application programming
- 3 Retrieve data as needed

## One-Time PDT Firmware Programming

- 1 Open the BACKTRACK RemoteLink program.
- 2 Click on the **One-Time PDT Firmware Programming** button. The One-Time PDT Firmware Programming dialog appears.



**Figure 3-1** One-time PDT Firmware Programming

- 3 Specify the manufacturer, PDT model, COM port, and baud rate settings for your PDT and then click **OK**. A dialog appears displaying the instructions for programming your PDT model.
- 4 Click the **Print** button to print out your PDT's programming instructions.
- 5 Click **OK** and follow the printed instructions to program your PDT.

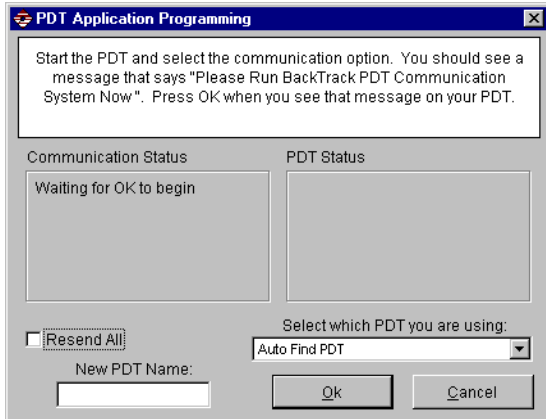
## PDT Application Programming

The PDT Application Programming function allows you to program the PDT to remotely perform Check Out/Take Out, Check In/Restock, Move, Add Items, and Physical Inventory transactions in BACKTRACK RemoteLink.

### Note

You must receive the PDT Programming file from the main BACKTRACK program and successfully import it into the BACKTRACK RemoteLink program before the PDT Application Programming function will be enabled.

- 1 Open the BACKTRACK RemoteLink program.
- 2 Click on the **PDT Application Programming** button. The PDT Application Programming dialog appears.



**Figure 3-2** PDT Application Programming

- 3 Each time BACKTRACK communicates with the PDT, or to replace a PDT license with a different PDT, the PDT's name is displayed. If you would like to distinguish this PDT from other PDTs you are using with BACKTRACK, enter a name in the **New PDT Name** text box.
- 4 On the PDT, press the key designated as the Communication key (this is typically the '9' key) to display the "Please Run BACKTRACK PDT Communication System Now" message. The figure below shows the message that should appear on your PDT display.
- 5 Click **OK** on the PDT Application Programming dialog on your PC to begin the transfer. BACKTRACK RemoteLink will now locate the PDT by checking all the serial ports and serial port parameters. Once found, the PDT information is retrieved and displayed. The PDT is then programmed with the BACKTRACK information.

- 6 When the programming is complete, the PDT will display a "BACKTRACK download done" message and will return to the main BACKTRACK RemotELink main screen.
- 7 Press any key on the PDT to bring up the PDT Main Menu.

### Using the PDT Main Menu

The PDT Main Menu shows the transactions you can perform and the keystrokes used to execute them. You can view the PDT Main Menu screens by pressing the up or down arrow on your PDT's keypad. To select a PDT Main Menu option, simply press the number or letter to the left of the menu option. Any of the Main Menu keys can be pressed at any time (even if the option is not displayed on the screen at the time). The following table outlines the Main Menu options used for normal operation of the PDT.

PDT Code	Command
1	Check Out/Take Out
2	Check In/Restock
3	Move
4	Add Item
5	Physical
7	PDT Status
8	Set Application
9	Communication (with BACKTRACK)
0	Turn Unit Off

#### Note

The command prompts may appear differently than those listed above if they were previously customized to fit a particular application.

#### X Check Out (Item Tracking Applications)

- 1 From the PDT Main Menu screen, select the "1. Check Out" option.
- 2 Enter your User ID by scanning an ID badge or entering it using the PDT keypad.

- 3 Enter or scan the Item Number and any additional information that you are prompted for.
- 4 Repeat step 3 until you have selected all of the items you intend to check out.

**X Check In (Item Tracking Applications)**

- 1 From the PDT Main Menu screen, select the " **2. Check In**" option.
- 2 Enter your User ID by scanning an ID badge or entering it using the PDT keypad.
- 3 Enter or scan the Item Number and any additional information that you are prompted for.
- 4 Repeat step 3 until you have selected all of the items you intend to check in.

**X Take Out (Inventory Tracking Applications)**

- 1 From the PDT Main Menu screen, select the " **1. Take Out**" option.
- 2 Enter your User ID by scanning an ID badge or entering it using the PDT keypad.
- 3 Enter or scan the Source Location (the location from which you are taking the item).
- 4 Enter or scan the Item Number and enter the Quantity you are taking from this location. Enter any additional information that you may be prompted for.
- 5 Repeat step 4 until you have entered all of the items you are taking from this location. (To change the source location you must return to the PDT Main Menu screen and start over.)

**X Restock (Inventory Tracking Applications)**

- 1 From the PDT Main Menu screen, select the " **2. Restock**" option.
- 2 Enter your User ID by scanning an ID badge or entering it using the PDT keypad.

- 3 Enter or scan the location from which you are taking the item.
- 4 Enter or scan the Item Number and then enter the Quantity of this item that is being restocked. Enter any additional information that you may be prompted for.
- 5 Repeat step 4 until you have entered all of the items you are restocking to this location.

#### X **Move (Item and Inventory Tracking Applications)**

- 1 From the PDT Main Menu screen, select the " **3. Move**" option.
- 2 Enter your User ID by scanning an ID badge or entering it using the PDT keypad.
- 3 Enter or scan the Source Location (where the item is coming from).
- 4 Enter or scan the Destination Location (where the item is being moved to).
- 5 Enter or scan the Item Number and then enter the Quantity of this item that will be moved. Enter any additional information that you may be prompted for.
- 6 Repeat step 5 until you have entered all items you will be moving.

#### X **Adding Items**

- 1 From the PDT Main Menu screen, select " **4. Add Item**" option.
- 2 Enter or scan your User ID.
- 3 Enter or scan the location where the items will be stored.
- 4 Apply the item ID label to the item and then scan its new Item ID bar code.
- 5 Enter a description of the item (or scan the description from the PDT Bar Code Menu if you previously created one).
- 6 Enter any additional information that you may be prompted for.



- 7 Enter all items for the current location.
- 8 Add the items for each additional location by repeating steps 1-6 above.
- 9 When you have finished entering items for all locations, press the key designated as the <Escape> key on your PDT. You can now retrieve the information as described in the PDT Data Retrieval section.

#### X **Performing a Physical Inventory**

- 1 Press "**5. Physical**" on the PDT.
- 2 Enter or scan your User ID.
- 3 Enter the location or scan it if you previously printed a menu of the locations.
- 4 For each of the items in that location, enter or scan the Item Number and Quantity (if applicable).
- 5 Press the key designated as the <Escape> key to change the location.
- 6 Repeat steps 2-5 for each location.
- 7 When the physical inventory is complete, retrieve the information as described in the PDT Data Retrieval section.

#### X **Check PDT Status**

Press "**7. PDT Status**" to view the PDT Status screen. The PDT Status screen shows how many records are in the PDT, how many more can be scanned, the memory that is still available, and the current date and time.

#### X **Set Application (to work with the PDT)**

The **Set Applicat** (short for Set Applications) Main Menu option allows you to set the BACKTRACK application to be used when capturing transaction information. The application can also be set at any time by scanning the appropriate bar code from the PDT Bar Code Menu if you created one previously. You can use the up and down arrows to view the available applications and press <Enter> to select an application.

**X Communicate with BACKTRACK**

Select the **"9. Communication"** PDT Main Menu option to retrieve data from the PDT and send programs from BACKTRACK to the PDT.

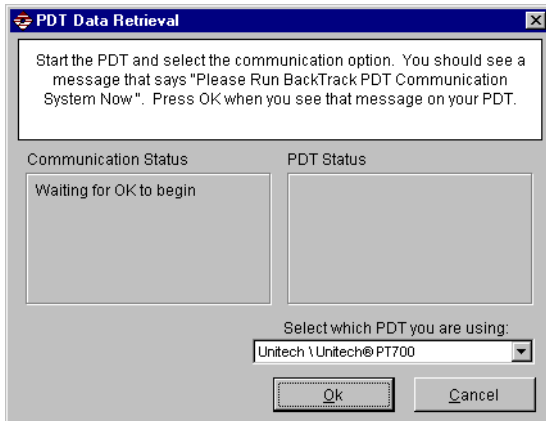
**X Turn Unit Off**

Although the PDT is configured to turn off automatically when not in use for a specified duration and can be turned off with the power button, it is better to turn off the PDT by selecting the **"O. Turn Unit Off"** PDT Main Menu option. This forces the password to be re-entered if one has been enabled.

## PDT Data Retrieval

The PDT Data Retrieval function allows you to transfer the PDT transaction records from the PDT into BACKTRACK RemoteLink so you can track all item activities performed using the PDT.

- 1 Open the BACKTRACK RemoteLink program.
- 2 Click on the **PDT Data Retrieval** button. The PDT Data Retrieval dialog appears.



**Figure 3-3** PDT Data Retrieval

- 3** On the PDT, press the key designated as the Communication key to display the "Please Run BACKTRACK PDT Communication System Now" message.
- 4** Click **OK** on the PDT Data Retrieval dialog on your PC to begin the transfer. BACKTRACK will now locate the PDT by checking all the serial ports and serial port parameters. BACKTRACK RemoteLink then retrieves all of the transaction records into a file that will be sent to the main BACKTRACK program.

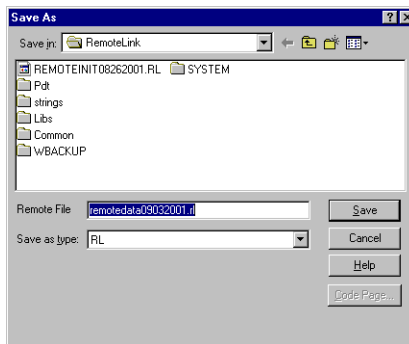
# Exporting Retrieved Data



The Export Retrieved Data function enables you create a file containing the data gathered from the BACKTRACK RemoteLink PDT data retrieval module, export it, and then send the data to the main BACKTRACK program.

## X Exporting Retrieved PDT Data from the BACKTRACK RemoteLink Program

- 1 From the main menu of the BACKTRACK RemoteLink program, click the **Export Retrieved Data** button. The Save As dialog appears.



**Figure 4-1** Export Retrieved PDT Data



- 2 One file will be created. The default name is remote-data<date>.rl. Write down the name and location of the saved file, as you will be sending this file to the BACKTRACK main program to import remote data.
- 3 To enable password protection and encryption on the file, click **Yes** and enter your password. To continue without a password click **No**.
- 4 A dialog will appear to notify you that the retrieved data transfer file has been successfully created. Click **OK** to return to the RemoteLink Functions dialog.

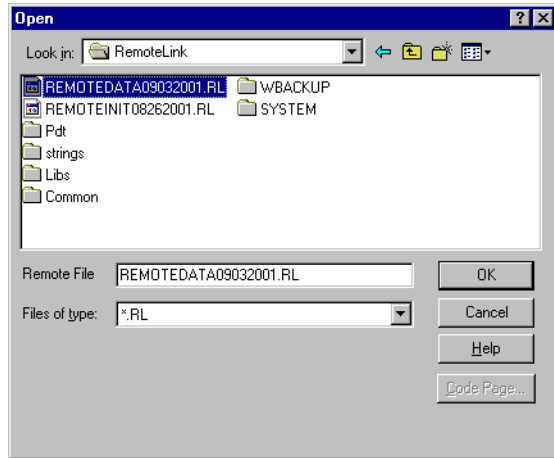
**Note**

After you have created one retrieved data transfer file and you return to the BACKTRACK RemoteLink main menu, the **Export Archived Retrieved Data** button will be enabled. This function allows you to resend previously stored export files in case a file does not get transmitted or processed properly.

## Importing the Remote Data File into the BACKTRACK Program

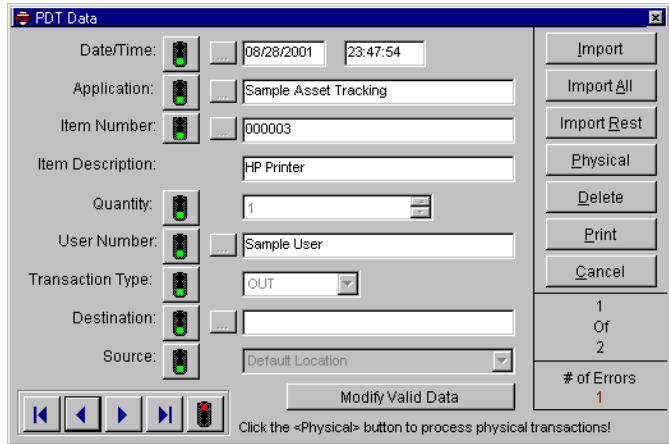
After you create and electronically send the Export Retrieved Data file from the BACKTRACK RemoteLink site, you will need to import that file into the BACKTRACK main program to update the master database with the remotely captured information.

- 1 In the main BACKTRACK program, click on the Database Maintenance Module, click on the **PDT Functions** button, and then click the **RemoteLink Functions** button.
- 2 Click on the **Import Remote Data File** button. The Open dialog appears.



**Figure 4-2** Import Remote Data File

- 3 Locate and highlight the “remotedata<date>.rl” file that was created when you exported the retrieved data from the remote site. Click **OK** to continue. (Remember that the name will be different than the one in the example.)
- 4 Enter the password if the “remotedata<date>.rl” file has a password and click **OK** to continue.
- 5 Once this file is imported, you will receive a notice that the retrieved data file imported successfully. Click **OK** to continue. The PDT Data dialog appears.



**Figure 4-3** View Imported PDT Data

The PDT Data dialog shows which records are being processed and any data records that have errors in them.

At this point the data has been successfully imported into BACKTRACK. Refer to the BACKTRACK Online Help and manual for information on processing the data.





United States  
1-414-837-4800

France  
33-562-601-080

Germany  
49-6103-30026-0

Singapore  
65-6477-7293

China  
86-21-6100-6588

Japan  
81-45-461-3603

Copyright 2013 Teklynx Newco SAS. All rights reserved. TEKLYNX and BACKTRACK are trademarks of Teklynx Newco SAS. All other brands and product names are trademarks of their respective owners. (Y575003)

[www.teklynx.com](http://www.teklynx.com)