Welcome to the DATA-MAXX family of customers. With this manual and our available technical staff, you will learn how to fully implement your DATA-MAXX system. If you need additional technical support beyond this manual, please contact our support group at 1-888-995-0184 or log your issue on www.data-maxx.net/support. You can use our automated support system to log and track your technical issues.

Let's begin your first steps to automated inventory data collection!

Section I

Installation and Setup:

1: Overview

The DATA-MAXX V7 data collection system manages data collection in remote and stationary environments.

While DATA-MAXX was designed to run effortlessly under Microsoft Windows this manual does not provide the user with training to run Microsoft Windows. Refer to the MS Windows tutorials located in the MS Windows help menu and the manuals that came with the Windows program for more information. Proficiency with Windows enhances your productive use of DATA-MAXX.

There are many ways to approach learning DATA-MAXX. It is suggested that you read through this manual, then practice going through all the functions of the program with some trial data. Delete the trial data before going live with your payroll system.

Your ongoing business is appreciated. Please do not hesitate to call or write with comments or desires. We will continue to provide more features based on requests.

The DATA-MAXX Process

The DATA-MAXX system has three main components that work together and play the role of collecting, storing, processing and using data.

1. Capture the data with any one of several devices. Devices for inventory data collection include remote hardware such as mobile scanners, Nextel phones with bar code scanners, PDA (Palm, Windows Mobile and Windows CE operating systems).

2. Program the data collection devices by installing the software on the units and setting up the Web Services Application program to communicate with them. Consult the appropriate DATA-MAXX manual for setup of your particular device.

3. Start collecting data with the chosen device.

4. Use Data-Maxx Data Web Services Application program to facilitate the transfer of the data from the device to the DATA-MAXX V7 software.

5. View, edit, report and export the data with the DATA-MAXX V7 software.

Note: This manual focuses on setting up and using the inventory software. For assistance setting up and using clocks or other collection software modules, please refer to the appropriate user guide.

Tips for a successful Startup and Operation

1. Read this manual.
2. Test all components including data collection communications and database before "going live".
3. Complete a trial run with only a few employees before bringing on all employees.
4. Parallel your existing system with DATA-MAXX for one or two periods.
5. Use an uninterrupted power supply (UPS) for data integrity.
6. Back up your database daily!

Step-by-Step Guide

As with all new programs, understanding the program's basic flow makes it easier to use effectively and gets results faster. Here is a step-by-step flow of the data clock process.

1. Data is entered into the data collection device via drop downs, bar code scanning, RFID read, typically with a rugged PDA with a built in bar code or RFID reader. Data is synced from the PDA device itself and Web Services Application must be left running or set up as a service (see PDA User Guide for more information on this setup and configuration).

   The PDA sends data to the host either via serial connection, modem transmission or wirelessly, depending on the device model purchased. The application runs under Palm, Windows Mobile, or Windows CE operating systems. The device chosen will determine what version of the software is needed, depending on operating system, as well as the transmission method the unit is capable of. The units typically come with either bar code or RFID readers and the scanning is activated with the scan button on the PDA. See the device User Guide for additional information on the keypad of your unit.

2. DATA-MAXX Web Services Application updates the files on your device when synced, and punches can also be synced to Web Services Application that have been entered into the device.

3. DATA-MAXX creates transactions based on the punches from the device. Screens are available for edit of those transactions before they are synced to the accounting system, as well as a variety of inventory reports. Transactions can be modified until they are synced to the accounting system. Once synced to the accounting system, they will show a posting date on the transactions and edits will not be allowed to be made.

4. Summary or detail reports are printed. Optional management reports are printed.

5. Summary information exports to the accounting system.

6. Optionally archive the data. Archiving allows you to send previous data to another file so your current file remains small, which helps in the time it takes to process data.

7. Back up data files regularly.

Note: Follow the Getting Started setup and processing instructions in the next chapter to ensure you are ready to receive data before using DATA-MAXX for the first time.

Requirements for Operating DATA-MAXX

Hardware/ Software Required:

Microsoft Windows Vista or higher
4 gigabytes of RAM
20 gigs of free Hard drive space

Recommended:

Microsoft Windows 7 Professional/ Server 2008 R2 or higher

8 gig of RAM
20gigs of free Hard drive space

DATA-MAXX V7 Inventory Features

Ability to run system standalone or integrated with your accounting system

User entry allowed for items, jobs, vendors, cost codes as well as automatic posting of these tables from the accounting system.

Ability to print one or multiple bar code labels for items

Editing of transactions before going to accounting system.

Transaction types broken down into separate review/edit screens.

Inventory reports of transactions that can be filtered by Date, Item #, Class, Job, Phase, and Cost Code.

Automatic sync routine available for posting to accounting system with logged posted date.

Upgrade Instructions

If you are upgrading DATA-MAXX from a previous version, please refer to the Upgrade instructions that are provided with the upgrade links or download file.

2. Getting Started

Getting Started Overview

Getting started with DATA-MAXX is easy. The following check list of activities will insure you have everything set up correctly.

STEP 1
CHARGE DEVICES AND INSTALL DEVICE SOFTWARE

- Install batteries in PDA devices and charge for 24 hours. Mobility scanners come with the battery installed, but does require charging for 24 hours.
- Learn keys on the device (see User Guide for your particular device).

- Install the device software per the DATA-MAXX User Guide for your particular device. Device software installation for PDAs should include the Microsoft Mobile Device Manager for future communications with the device in installing upgrades and additional software. See the PDA User Guide and your device User Guide for complete details on installing Microsoft Mobile Device Manager.

STEP 2
INSTALL V7 AND WEB SERVICES APPLICATION SOFTWARE

- Install the DATA-MAXX Web Services Application software on your server or chosen client workstation. The Web Services Application software is used to determine device setting and drop down configurations, as well as sync back and forth between the device and V7. It is typically installed on the file server, but can also be installed on a client workstation. Refer to the PDA User Guide for complete instructions on the installation of the Web Services Application program.
- Install DATA-MAXX V7 database program. V7 software is a client/server software that should be installed on each workstation that will be accessing the data once the transactions come from the device. It can be installed on multiple workstations, but does not need to be installed on the server. Once installed, a database will be created upon opening the program. If multiple users are going to share this database, then the database needs to be moved to an appropriate place on the server and rights given to the users for that folder.
- Set up the Company information in Setups, Company. Be sure to point DATA-MAXX to the company by entering the correct drive and path. It is best to place the company data file on your network file server so it gets backed up with the network backup. Each individual workstation that will be running the V7 program will need to have the database installed and point to the same data file on the network. Pointing to the shared database file can also be done in Administrative Tools.
- Make sure your integration is completed and in place on all PCs that need to run it to bring over data from the accounting system such as items, jobs, vendors, cost codes, purchase orders, etc. (Microsoft access will be needed if you have timberline (Sage 300))
- Set up department codes and descriptions if desired (optional)
- Set up division codes and descriptions if desired (optional)
- Set up job codes and descriptions (optional)
- Set up phases and descriptions (optional)
- Set up cost codes and descriptions (optional)

- Note: Jobs, phases and cost codes correspond to 3 fields in our system that you can collect information for. In some cases, we will set your system up to track other items of information that may be called by different names. You can change the names of these 3 levels (fields) in our system to customize the type of information you are collecting.
- Set up the DATA-MAXX Web Services Application program. Test to be sure it is installed and working correctly. Once the information in the above sections has been setup and you can see data, test syncing the device to see if the data becomes available in the drop downs. Print a bar code label if you are utilizing bar codes to scan items and see if the device will scan the bar code properly.

STEP 3
TEST

Test the system by:

- Entering several transactions on the PDA, i.e. Issues, Returns, Transfers, etc.
- Sync the data via wireless or cradle, depending on setup method.
- Check date range at the top of the program to make sure you are looking at the data that you just transmitted. In order to change the dates, just double click on the date and choose the correct day by double clicking the date.
- Check data transmitted by going into Edits and Processes menu under the Inventory tab. Data should appear for all items that have transactions and have been set up in the system under Setups, Inventory. In the Edits and Processes section, click the Inventory tab and you then have multiple tabs available, depending on the type of transaction you want to view, i.e. Issue, Returns, Transfers, etc. Flip between screens by clicking on the tab you want to view data for.
- Delete test data. Go into Edits and Processes, Inventory. Highlight all records and press the Delete Key. Note: When deleting multiple records at a time, press the delete key on the keyboard instead of the delete icon.

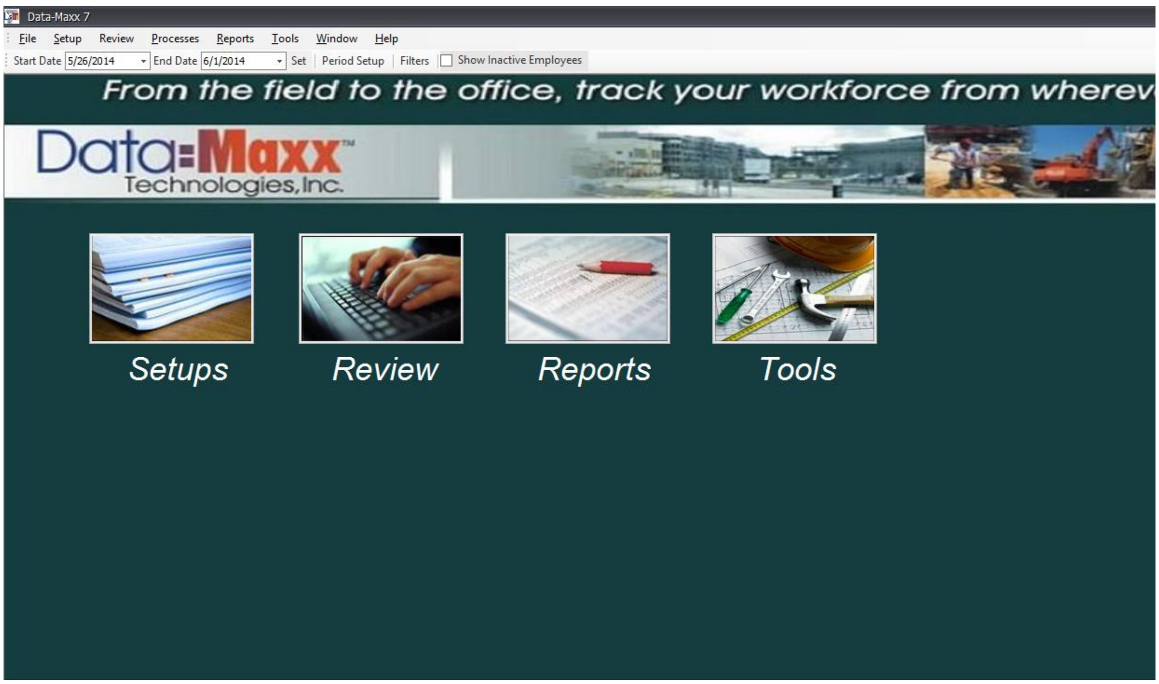
Installing DATA-MAXX

To install DATA-MAXX,
Follow the instructions on the document linked below
http://data-maxx.net/Manuals/DM7/How%20to%20Install%20Datamaxx%20Version%207.pdf

Once the installation is complete, the setup creates a new application group with all the DATA-MAXX icons.

Navigation Toolbar

When you first start DATA-MAXX V7 you will see the following main menu.



The items on the left side of the menu are the main icons. They are:

SETUPS – all setup functions including company, departments, divisions, items, jobs, phases, cost codes, employees, and vendors. To hide other tabs that may not be used, see the Security section of this manual to make the tabs invisible upon opening the program.

EDITS AND PROCESSES – used for viewing and editing data collected, as well as importing and exporting data.

REPORTS – used for viewing and printing inventory reports. Also used to print bar codes for items, jobs, cost codes, and other levels of tracking.

TOOLS – used for file management, for setup of user criteria, and archiving of data.

FILTERS – Used to view, print or export data for a particular range or set. Use filters to view one item or group of items in a range, one job or group of jobs, one phase or group of phases, one cost code or group of cost codes, one department or group of departments, one division or group of divisions (named Class in Inventory Setup screen) You can use the drop down or key in the range you wish to view. This criteria works in conjunction with the data range to view, print or export data.

When you press any of the main icons above, the system will then go to a screen that has other tabs for that section. To go into one of those sections, just click on the tab. In addition to these tabs in each main section, the following drop down are available at the top left of the main menu screen.

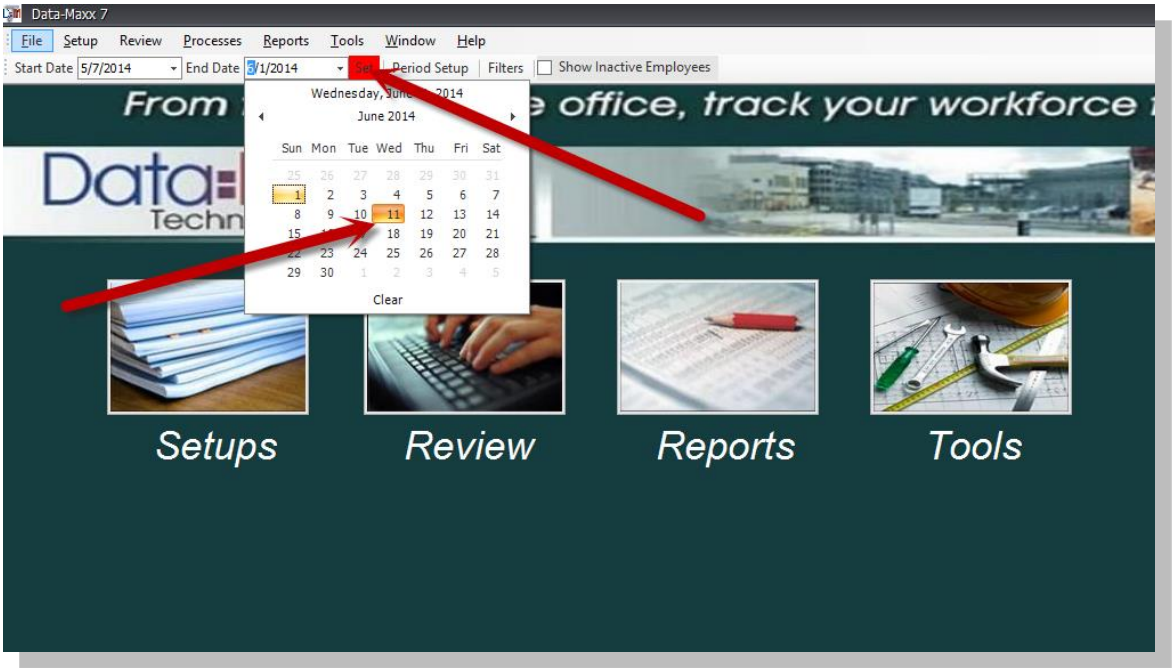
File – Printing functions such as page setup, print setup and print preview

Categories – Same functions as Setups, Edits and Processes, and Reports as the icons on the main menu.

Processes – Contains functions such as time processing (labor only) that is not run for inventory purposes.

Help – This section contains version and help information about DATA-MAXX. This drop down also allows you to go to the DATA-MAXX website and view the log file.

Changing Dates – To change the dates being viewed in Data-Maxx, just double click on the date and the system will bring up a calendar to pick the beginning and ending dates. The pay period is also located in the date selection. When done with your selection, hit the red set button



The Next Steps in DATA-MAXX

You are now ready to:

1. Set up Company information
2. Set up Department Codes if desired
3. Set up Division Codes if desired (Item Classes)
4. Set up Jobs if desired
5. Set up Phases if desired
6. Set up Cost Codes if desired)
7. Set up Employees
8. Set up Communications between the PDA and the DATA-MAXX software

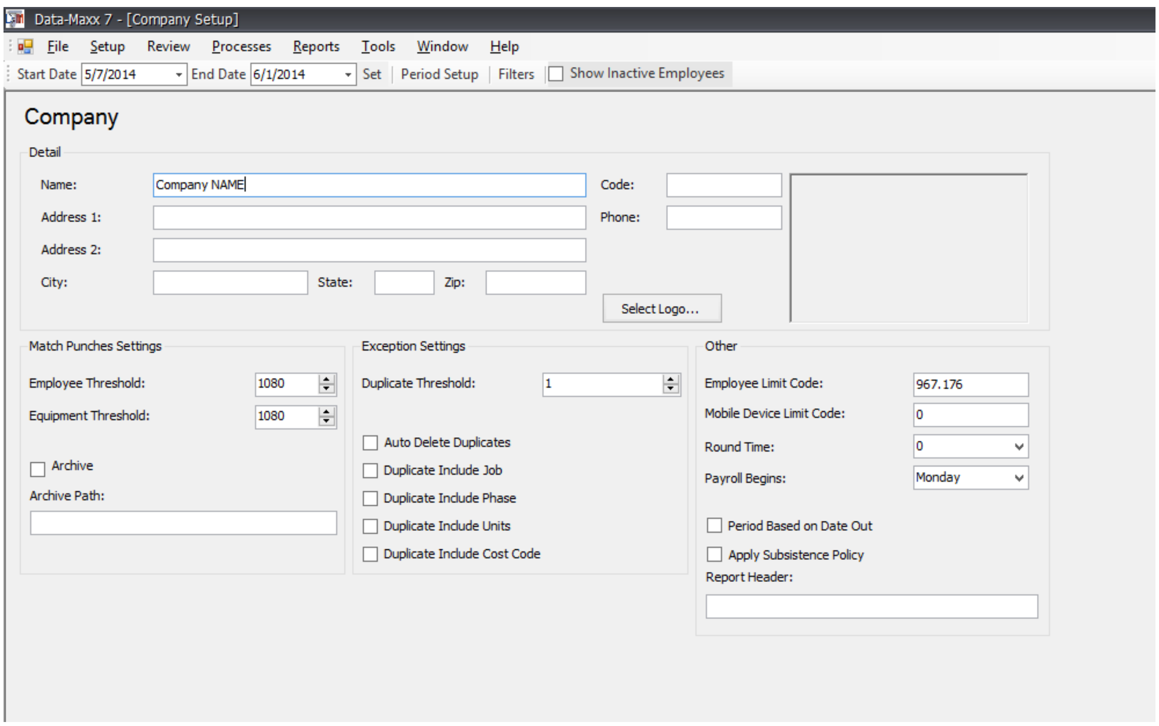
SETUPS -----

COMPANY

Overview

All company additions, edits and selections are made from the Company Setup form in DATA-MAXX. To access the Company Setup form, click on the Setup icon from the main menu, then Company button on the toolbar.

When you first launch DATA-MAXX after installing, you may get a message indicating you must create or set up a company or choose an existing company. Click to create a new company and the system will create the necessary data files and then bring up the company setup screen. The system will require you to create a filename. Normally this is named your company name such as datamaxx. The system would create a datamaxx.dmd file at the specified location. You now add the information necessary to create the company data base and set the parameters for your company.



Setting Up a Company

Fill in the fields, pressing Tab or Enter to move to the next field.

Company Name: This is the name of the company that will appear on reports if you do not have a report header, which is entered in this same screen.

Code: (Optional field) This field is used for connecting DATA-MAXX data to other programs that require a separate company code. Refer to your Data-Maxx tech support representative to see if this code is necessary for your integration.

Address: This is your company address with City, State and Zip Code.

Report Header: This is the header that you want to appear on the top of any report you print from V7. When printing bar codes, you can change this to reflect the type of bar codes you are printing at the top of the page. Otherwise, in most instances, it would be your company name.

Round Time To: This function will not be used in inventory processing.

Data File Path: This is the full drive and path name of the location of the company and data clock files. Choose the data file path by either typing it in or hitting the … button to the right of the Data File Path directory box.

Employee Limit Code (top right of the Company Setup Screen) – this is the employee limit code you are given when you register the program. An employee limit code is not necessary with the inventory module as it is purchased for use of an unlimited amount of items.

Icons

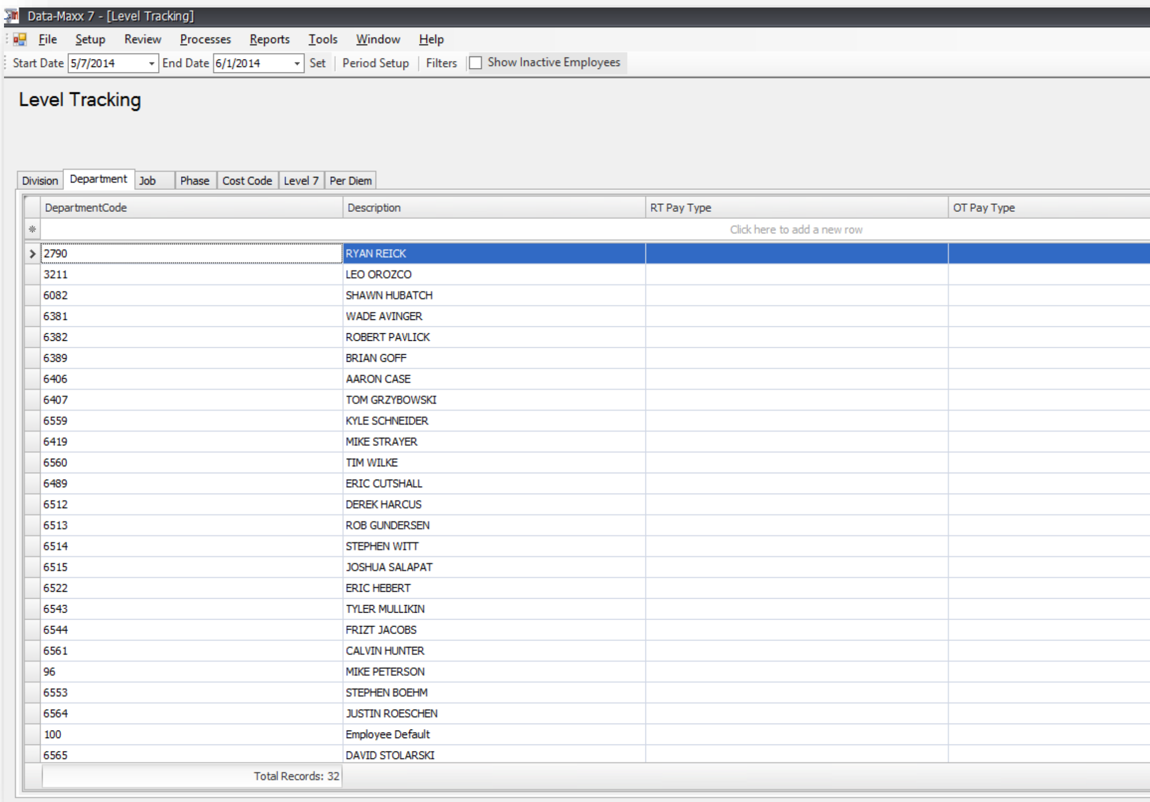
Note: All icons in the DATA-MAXX V7 will display the description when your cursor is placed on them.
Add Company Icon – Use this icon bottom left, first icon, to add additional companies.

Delete Company Icon – Use this icon bottom left, middle icon, to delete the current company.

LEVEL TRACKING

Level tracking contains the setups for departments, divisions, jobs, phases and cost codes.

DEPARTMENT CODE SETUP



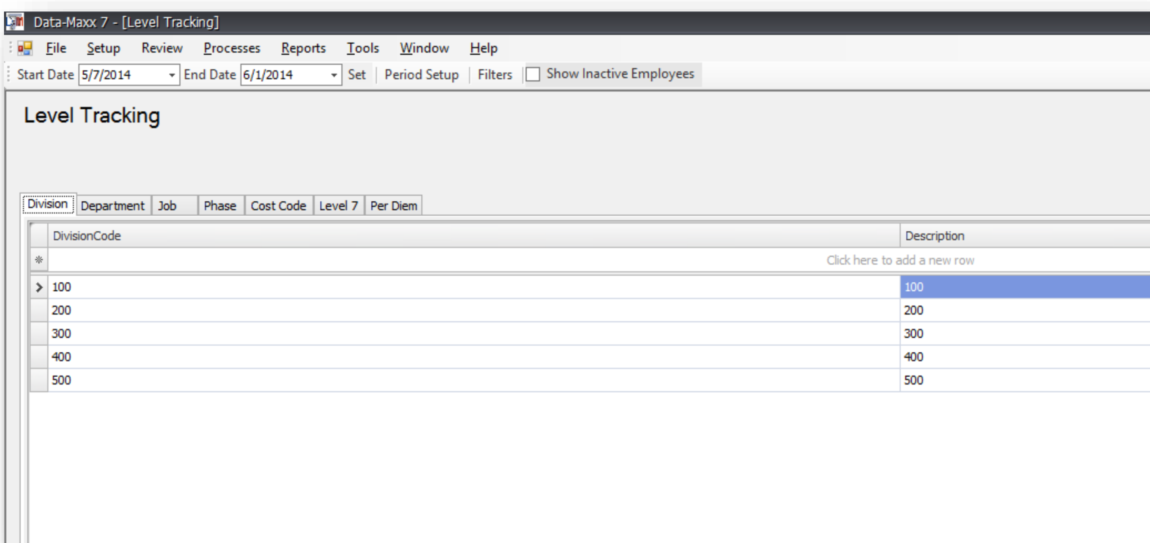
DepartmentCode	Description	RT Pay Type	OT Pay Type
2790	RYAN REICK		
3211	LEO OROZCO		
6082	SHAWN HUBATCH		
6381	WADE AVINGER		
6382	ROBERT PAVLICK		
6389	BRIAN GOFF		
6406	AARON CASE		
6407	TOM GRZYBOWSKI		
6559	KYLE SCHNEIDER		
6419	MIKE STRAYER		
6560	TIM WILKE		
6489	ERIC CUTSHALL		
6512	DEREK HARCUS		
6513	ROB GUNDERSEN		
6514	STEPHEN WITT		
6515	JOSHUA SALAPAT		
6522	ERIC HEBERT		
6543	TYLER MULLIKIN		
6544	FRIZT JACOBS		
6561	CALVIN HUNTER		
96	MIKE PETERSON		
6553	STEPHEN BOEHM		
6564	JUSTIN ROESCHEN		
100	Employee Default		
6565	DAVID STOLARSKI		

In an inventory configuration, the Department is typically used to define your warehouses or locations as they correspond to warehouses or locations in your accounting system. Also, you will want to default the location in the PDA Level 2 field if the PDA is going to be used at only one location. See the PDA User Guide for complete details on defaulting the Location (Level 2 Department field) so all transactions from that PDA are marked with the appropriate location. You can also set up multiple Departments (locations) in this section and then choose the appropriate location on the PDA.

The location, once defaulted or chosen from the drop down list in the transaction screen on the device is attached to every transaction. This allows you to print reports by location.

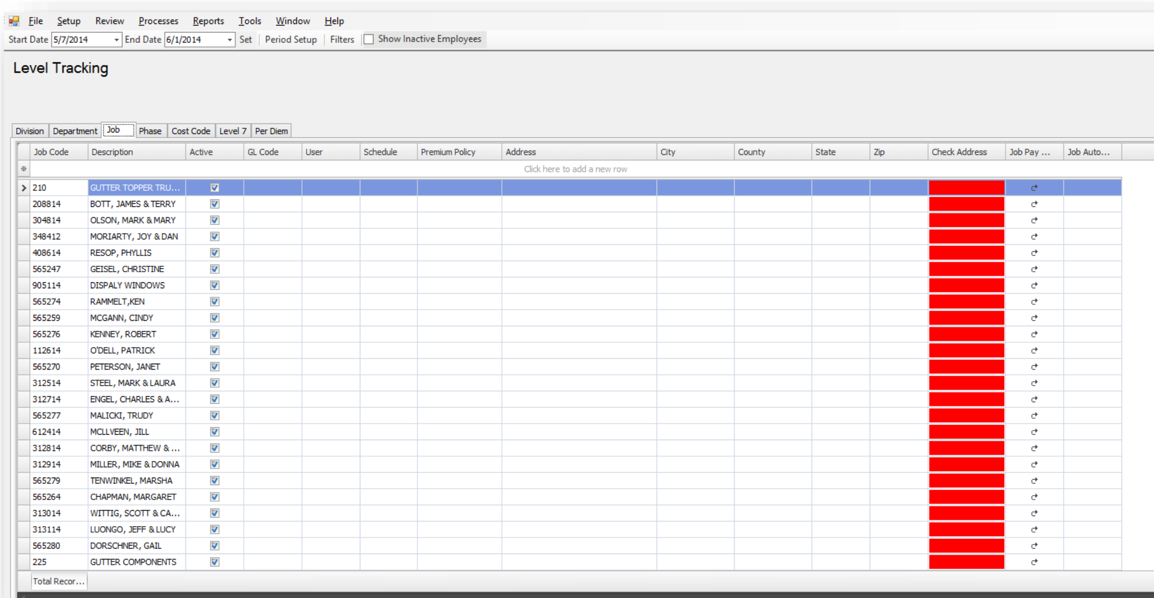
If you are using the Level 2 field to track the location or warehouse on the device, (generally required for inventory integrations), and wish to display the name of the location on reports, the location numbers and names need to be entered. In some cases, this information can also be brought over from the integration. To add locations manually, hit the Add Department icon located in the bottom left of the window. Type in the department or location number and then description. To delete locations, or locations, highlight the record of the location you wish to remove (the grey area to the left of the department number), and then hit the delete department icon, bottom left of the window. If you have more than one line to delete in any table, highlight the lines in the grey area to the left of the records, then hit the delete key on the keyboard.

DIVISION CODE SETUP



Divisions are used to differentiate groups of items. It is also displayed as the Class inside the Item setup screen. Defining classes on your items allows you to print reports by class or groups of items, which can also be helpful in printing bar code labels and bar code sheets for notebook scanning. Sometimes we also use divisions for multiple companies if the customer would like to keep all of the companies in one data file. To add divisions, hit the Add Division icon located in the bottom left of the window. Type in the division number and then description. To delete divisions, highlight the record of the division you wish to remove (the grey area to the left of the department number), and then hit the delete division icon, bottom left of the window. If you have more than one line to delete in any table, highlight the lines in the grey area to the left of the records, then hit the delete key on the keyboard.

JOB SETUP

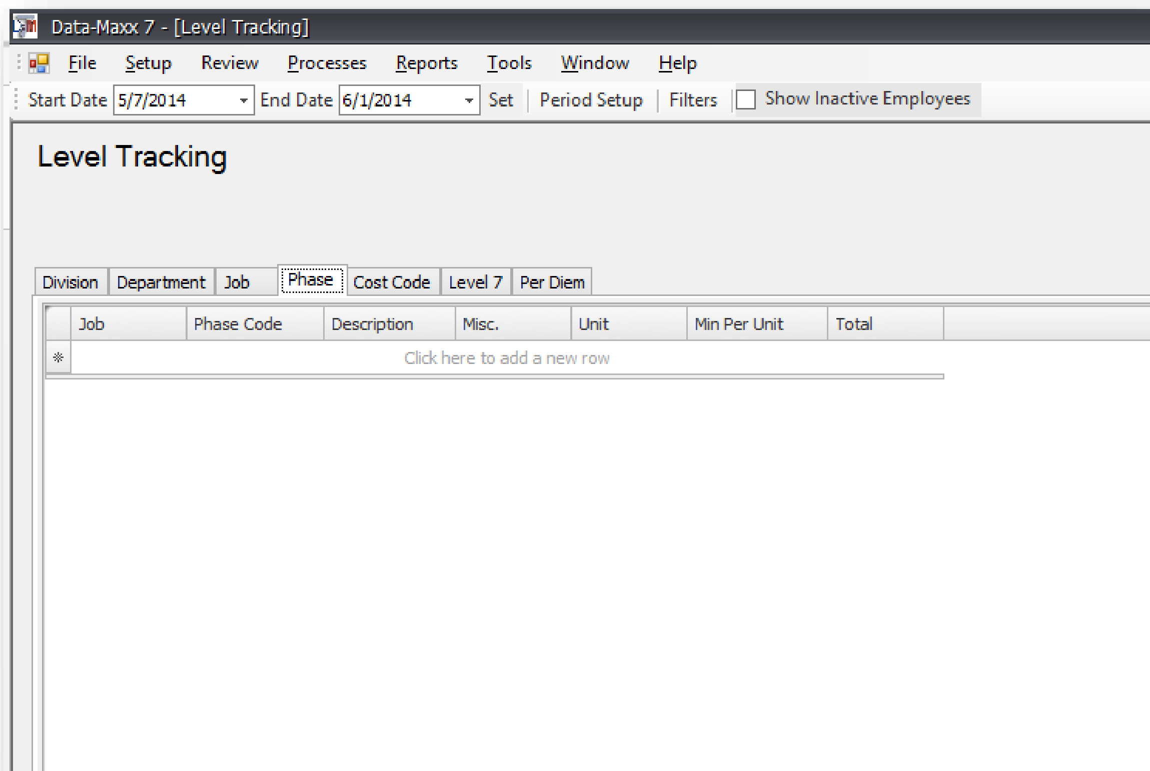


Jobs can be entered into DATA-MAXX, or in many cases, we bring them over from automatically from your job cost accounting system through an ODBC integration.

Data-Maxx Technologies, Inc.

Contact your DATA-MAXX representative for the best way for your jobs to get recorded into DATA-MAXX. To add jobs, hit the Add Job icon located in the bottom left of the window. Type in the job number and then description. To delete jobs, highlight the line to the left of the job you wish to remove (the grey area to the left of the job number), and then hit the delete job icon, bottom left of the window. If you have more than one line to delete in any table, highlight the lines in the grey area to the left of the records, then hit the delete key on the keyboard. You can make a job inactive by clicking the active checkbox. Checking it will make the job active, un-checking it will make it inactive. Inactive jobs will not be available in the drop downs on the PDA device.

PHASE CODE SETUP

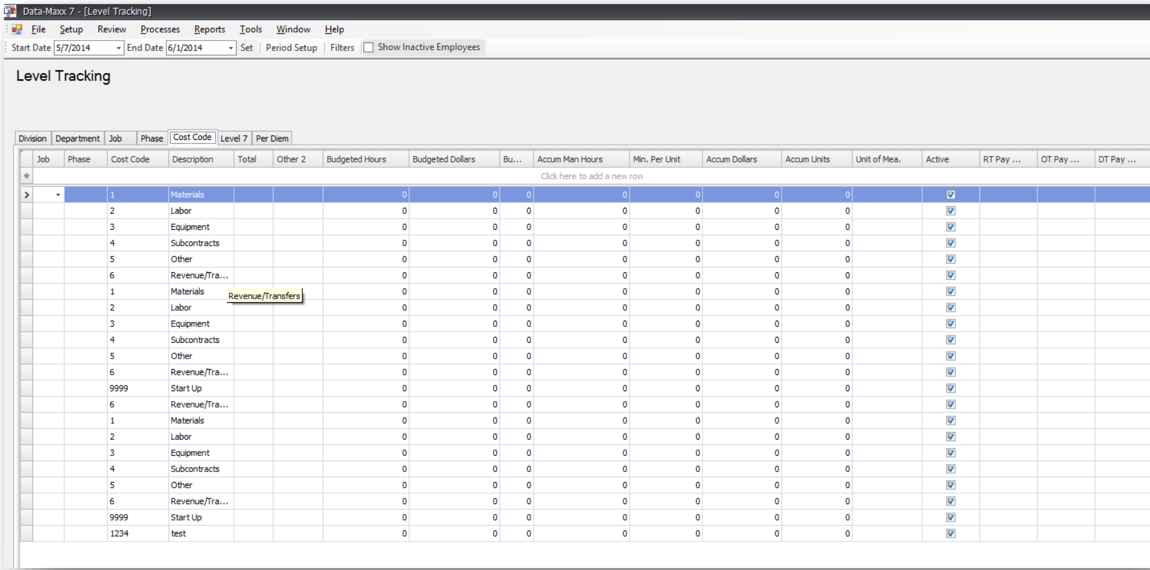


Phases are cost categories within a job. Some clients have track phases and cost codes, some just cost codes. If you have phases you want to track, they will need to be added into this section. **Phases can be entered into DATA-MAXX, or in many cases, we bring**

them over automatically through an ODBC integration to your accounting system. Contact your DATA-MAXX representative for the best way for your phases to get recorded into DATA-MAXX. To add phases, hit the Add Phase icon located in the bottom left of the window. Type in the job # (if you are tie your phases to a job), the phase number and then the description. To delete phases, highlight the line of the phase you wish to remove (the grey area to the left of the phase number), and then hit the delete phase icon, bottom left of the window. If you have more than one line to delete in any table, highlight the lines in the grey area to the left of the records, then hit the delete key on the keyboard. Phases that do not have a job number tied to them are considered to be standard phases.

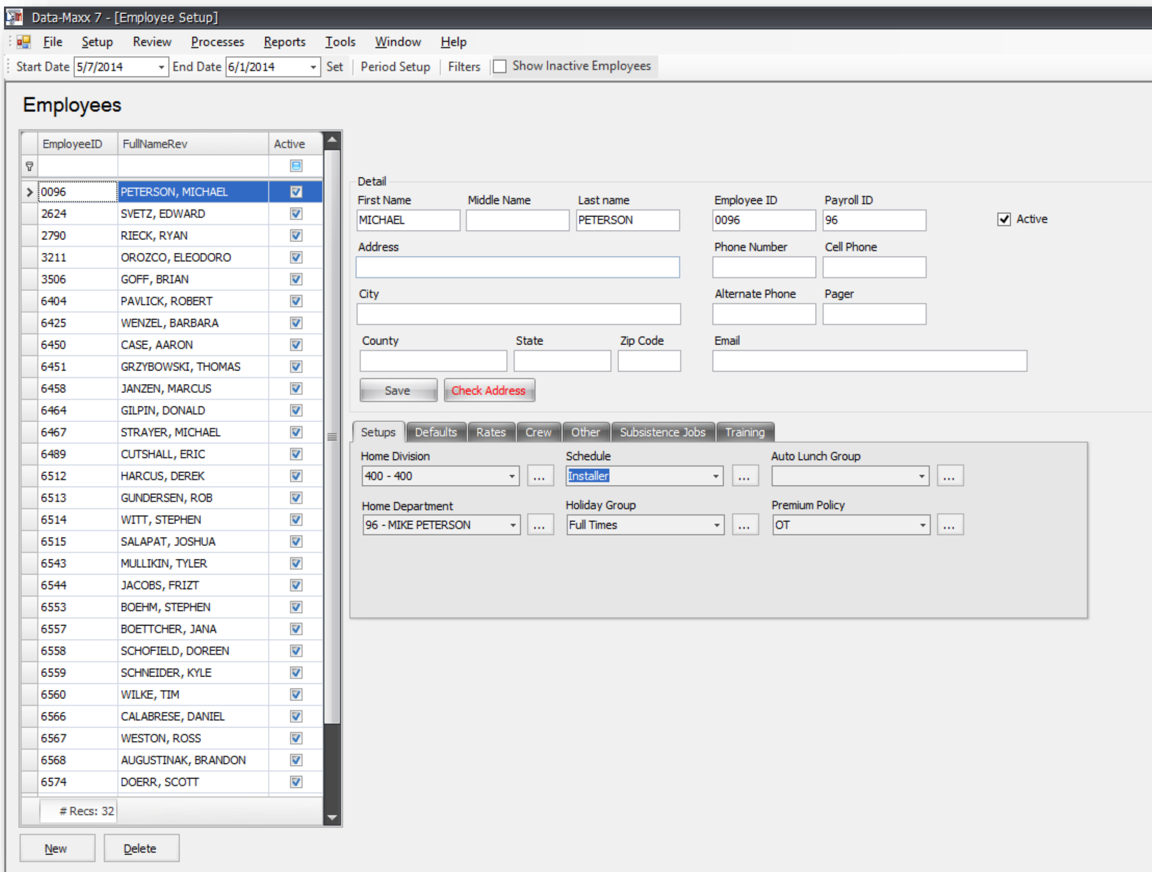
COST CODE SETUP

Cost Codes are cost categories within a job. Some clients have track phases and cost codes, some just cost codes. If you have phases you want to track, they will need to be added into the phase setup section (see above). **Cost codes can be entered into DATA-MAXX, or in many cases, we bring them over automatically through an ODBC integration to your accounting system. In typical inventory installations, the cost code that is defaulted to the item itself is brought over through that integration and any applicable cost codes dealing with inventory will be brought over to the cost code table. Contact your DATA-MAXX representative for the best way for your cost codes to get recorded into DATA-MAXX.** To add cost codes, hit the Add Cost Code icon located in the bottom left of the window. Type in the job # (if you are tie your cost codes to a job), the cost code number and then the description. To delete cost codes, highlight the line of the cost code you wish to remove (the grey area to the left of the phase number), and then hit the delete cost code icon, bottom left of the window. If you have more than one line to delete in any table, highlight the lines in the grey area to the left of the records, then hit the delete key on the keyboard. Cost codes that do not have a job number tied them are considered to be standard cost codes.



EMPLOYEE SETUP (is not needed in most inventory cases)

All active employees that are going to be tracked in DATA-MAXX need to be setup in the employee file. The screen is as follows and the items are described below. Employees are not typically tracked in the inventory module, however, some customers may choose to set up their employees so they can turn on an additional field for the employee that checked out the item. If this is desired, your employees will either need to be entered, imported, or brought over from your accounting system through the ODBC interface. Check with your DATA-MAXX technical support representative for the appropriate configuration if employee with transaction is desired. A customization may need to be done to have the employees show in the appropriate drop down on the PDA transaction screen. Typically, employees show in the drop down for Level 1, which if you are running the inventory module, level 1 would be the item number dropdown. If the employee names/numbers are necessary to be stored with the transaction, a customization can be done to move them to show in another dropdown. Alternatively, if you are not using Phase, you can also place them in the Phase table and they will show in the drop down of Level 4 on the PDA screen. If you are not using the Location field (check with your DATA-MAXX technical support representative for information on your particular accounting system and whether your integration requires the location before utilizing the Level 2 (Department) field on the PDA to store something other than location.



If you do add your employees to the employee table, the following is the definition for each of the fields.

Employee ID – The DATA-MAXX employee ID

Payroll ID – Your payroll system employee ID for this employee

First Name – First name of the employee

Last Name – Last name of the employee

Active – Checked if the employee is active. If you have terminated the employee but want to keep them in the file to be able to pull out reports with their employee information on it, just click here to make them inactive. If you want to make them active again, just click on the box to make them active again.

Note: If you want to view inactive employees when you look at the employee file, just click on the item at the bottom of the screen titled View Inactive Employees. Uncheck it to only see active employees.

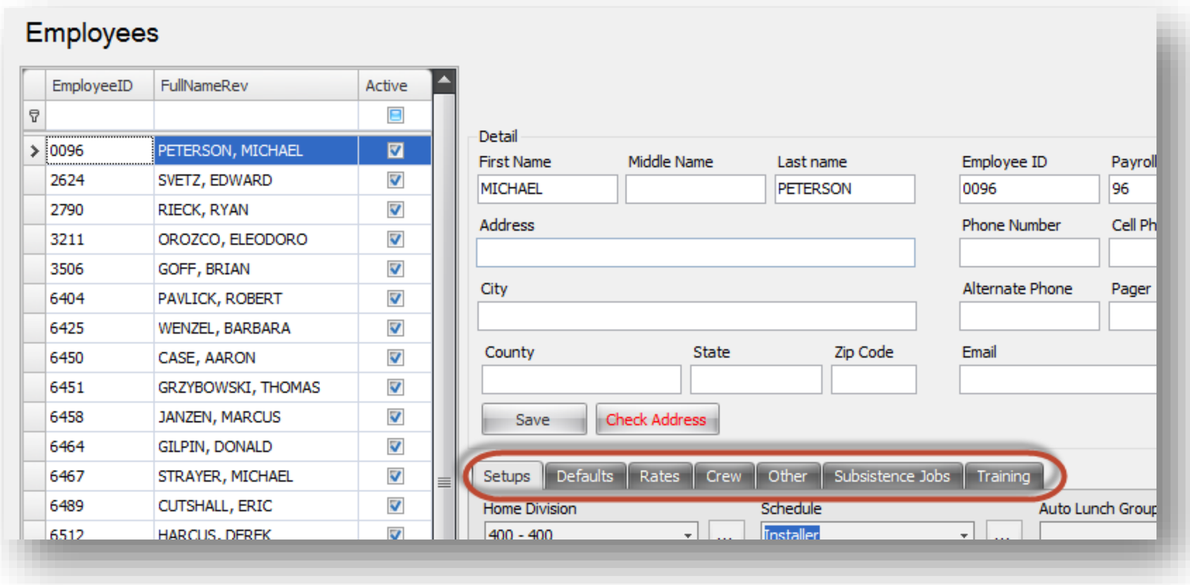
The fields above are the only fields necessary to track employees within the inventory module.

To add employees, hit the New Employee icon located in the bottom left of the window. Type in the employee information and choose the appropriate drop downs. To delete employees, highlight the record of the employees you wish to remove (the grey area to the left of the Employee ID), and then hit the Delete Employee icon, bottom left of the window. If you have more than one line to delete in any table, highlight the lines in the grey area to the left of the records, then hit the delete key on the keyboard.

DATA-MAXX can bring your employees in directly from an ODBC interface with your payroll system or perhaps an ASCII import from your payroll system. Ask your DATA-MAXX representative if this can be done for your system. If we do bring your employees in from an outside system, we will try to prefill any fields necessary from the information in your payroll system.

In addition to the information on each employee you see on the screen when you first enter the Employee Setup, there is additional information you can enter on the employee. This is entered by clicking the View Employee Detail icon at the bottom left of the screen. This information is optional and is strictly used for information purposes to the user.

View Employee Detail Setup



Contact Information – Allows you to enter address information for the employee.

Rates – Allows you to enter hourly pay rates and bill rates for the employee, as well as worker's comp percentages and overhead percentages. Normally, pay rates are not kept in the DATA-MAXX system, but are kept in the payroll system. The only time we suggest keeping pay rates within DATA-MAXX is if you want to print reports with pay rates and total dollars for the hours from DATA-MAXX.

Defaults – You can use defaults setup to always put the employee on a particular job, phase or cost code without having it scanned in or entered into the device. In order to do this, check the use defaults box, and choose the default for each level from the drop down.

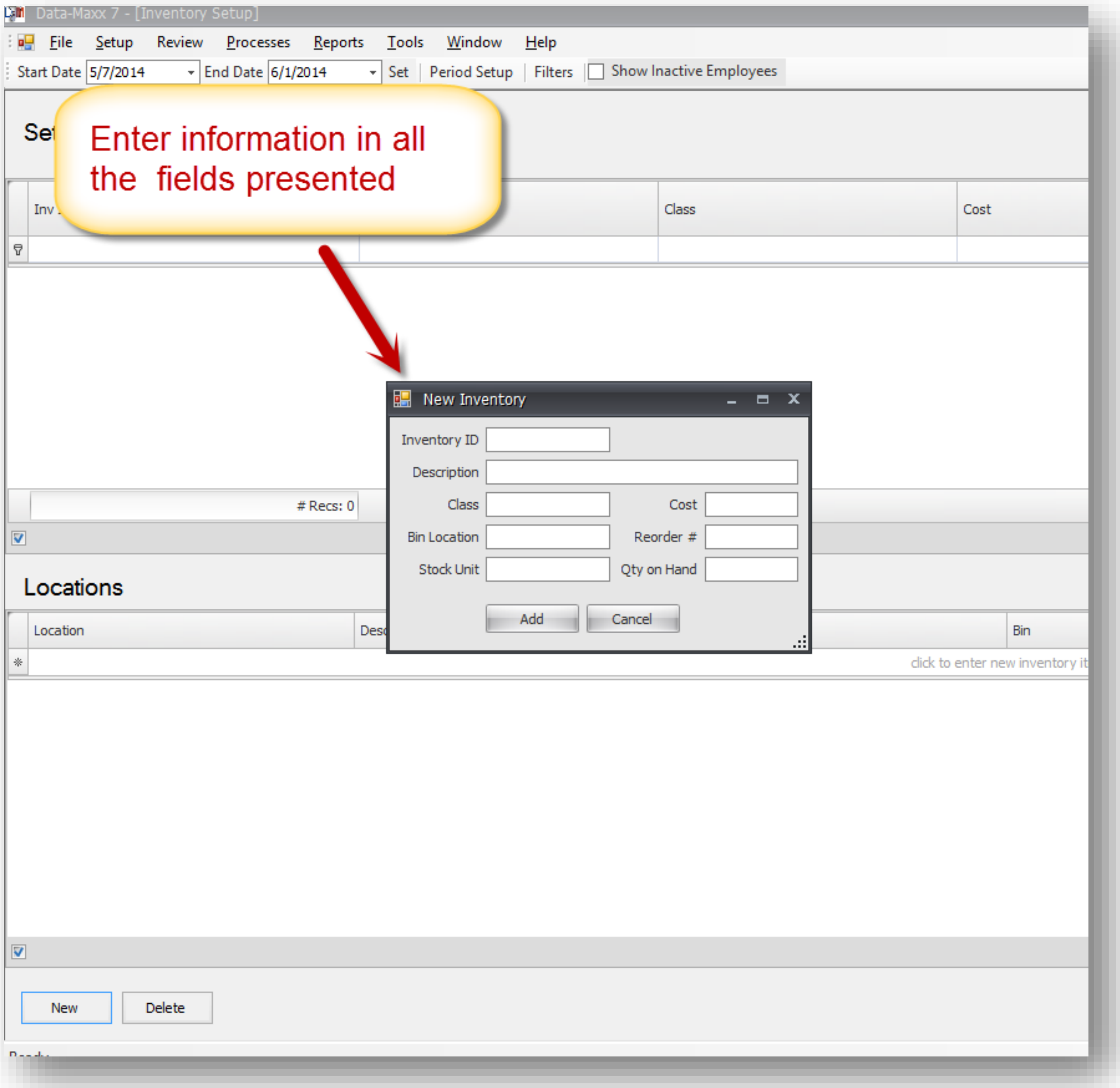
Crew – Allows you to enter crew information such as the vehicle the employee has, the supervisor he reports to, and the scanner device the employee has, if any. You can also check whether this employee is a supervisor, which will place them in the supervisor table.

Other – Allows entry of other additional information you may want to keep on the employee such as General Ledger, Union, Classification, etc. and allows you to keep their photo on file, as well as notes.

Note: Information entered on View Employee Detail setup is not available in reports and is only for viewing information purposes. Sometimes DATA-MAXX uses additional employee detail fields for custom reporting requests from our customers.

ITEM SETUP

Item setup is used to store all of your item numbers and descriptions, their bin location (if bins are used), stocking unit (which is the unit of measure), bin location, class, average cost, and quantity on hand. This section is also used to print a single bar code label for an item.



Items are considered active by the checkbox in the active column. Click the checkbox to make the item active, click it again to make the item inactive. You can view all inactive items by clicking the checkbox at the bottom of the screen or un-check it to view just active items. The item setup screen will show all items that are not filtered with your

Filters criteria. See the Filters section in this manual for more information on using filters.

Items are typically brought over from your accounting system through an ODBC integration, however, they can also be entered or deleted manually.

To add items, hit the New Item icon located in the bottom left of the window. Type in the item information and choose the appropriate boxes. To delete items, highlight the record of the item you wish to remove (the grey area to the left of the Item ID), and then hit the Delete Item icon, bottom left of the window.   If you have more than one line to delete in any table, highlight the lines in the grey area to the left of the records, then hit the delete key on the keyboard.

DATA-MAXX can bring your items in directly from an ODBC interface with your payroll system or perhaps an ASCII import from your payroll system. Ask your DATA-MAXX representative if this can be done for your system. If we do bring your items in from an outside system, we will try to pre-fill any fields necessary from the information in your accounting system.

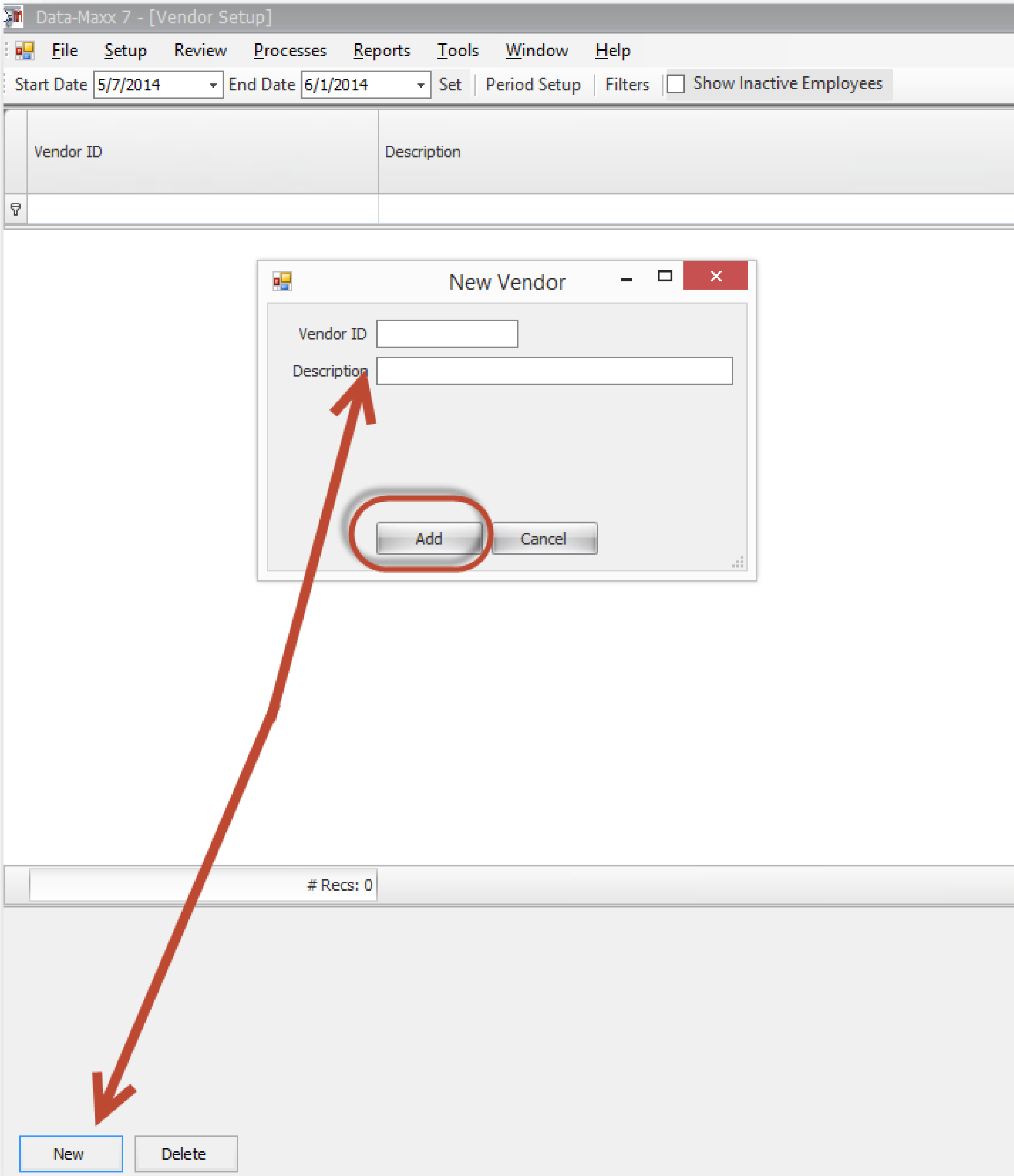
In addition to the information on each item you see on the screen when you first enter the Item Setup, there is additional information you can enter on the item. This is entered by clicking the View Item Detail icon at the bottom left of the screen. The information in the View Item Detail are the locations and quantities for this particular item.

VENDORS

The Vendor Setup screen is a listing of your vendor numbers and names. Vendors are typically brought over from your accounting system through an ODBC integration, however, they can also be entered or deleted manually.

To add vendors, hit the new icon located in the bottom left of the window. Type in the vendor name and number... To delete vendors, highlight the record of the vendor you wish to remove (the grey area to the left of the Vendor ID), and then hit the Delete icon, bottom left of the window.   If you have more than one line to delete in any table, highlight the lines in the grey area to the left of the records, then hit the delete key on the keyboard.

DATA-MAXX can bring your vendors in directly from an ODBC interface with your accounting system or perhaps an ASCII import from your accounting system. Ask your DATA-MAXX representative if this can be done for your installation. Vendors are used in the selection for filling purchase orders on the PDA screen.



Data:Maxx Technologies, Inc.

EDITS AND PROCESSES

Edits and Processes is the section where you will review and/or edit the data that comes in from the devices by transaction type.

Choose Edits and Processes, then Inventory, and choose the appropriate tab for the type of transactions you want to see in the date range and filter criteria you have selected.

Issues - This screen is a view of all data that has been received from the devices for issues, items that went out to jobs within the date range and filter criteria, if any, you have currently selected.

Returns – This is a view of all data that has been received from the devices for returns to inventory from jobs.

Transfers – Shows all transfer transactions from one location to another. Note in this screen that the field that the column for location shows Location From and there is a location to where the Job column would normally be. Transfer transactions are only transfers from location to location and not job to job. If you are transferring an item from one job to another, first return it to inventory with a Return transaction, and then issue it out to the job it is going to with an Issue transaction.

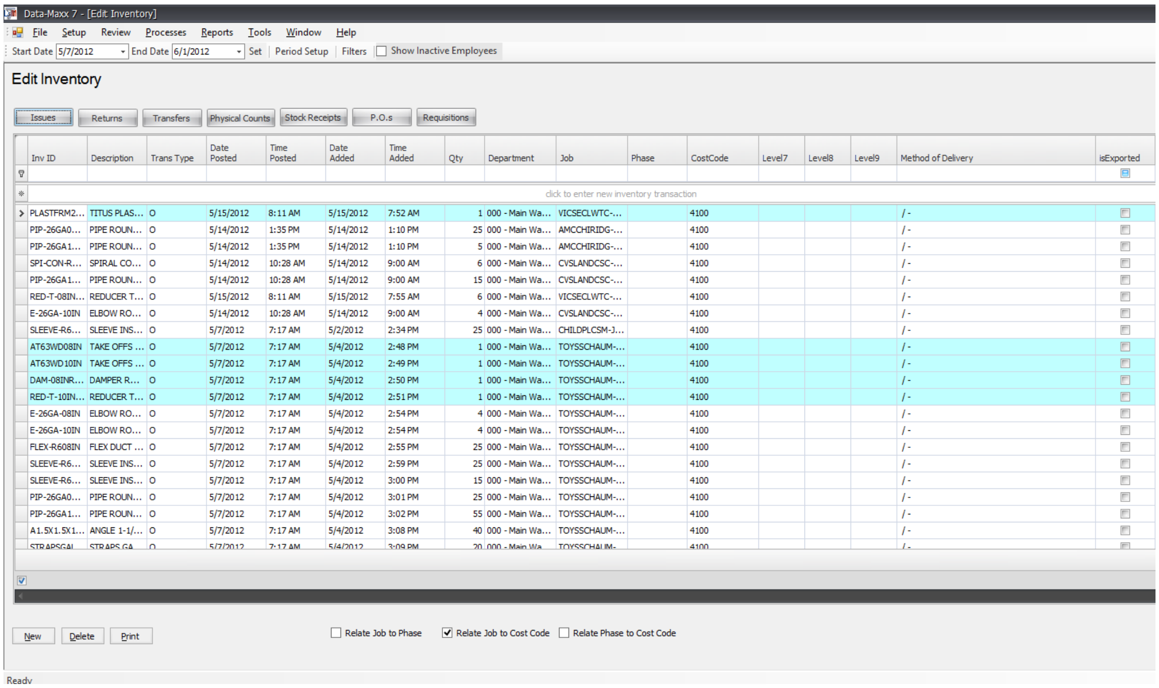
Physical Counts – Shows all data that has been received from the devices for physical count **transactions**.

Stock Receipts – Shows all stock receipt transactions recorded on the device. Stock receipts are typically receipts into inventory that are not connected to a purchase order.

P.O.s – Allows the viewing of all transactions that were receipts against a purchase order. The purchase order number would show as the Job in this screen.

Requisitions – Shows all requisition line items that have been filled. Not all accounting systems have a requisitions feature, which allows for the provisioning or reserving of stock inventory for a particular purpose, mainly a job. If you have the ability to create requisitions in your accounting system, DATA-MAXX can bring over the requisitions to the PDA and allow the user to fill them on the device.

The columns in each of these tabs are the same, with the exceptions listed above.



ID – number for the item that was entered or scanned.

Name – Item name as listed in the item setup.

Punch Type – issues are always considered an O or Out punch type as they are leaving inventory. Returns are an I punch type as they are coming in to inventory. Transfers are a T punch type, physical count transactions are a type PC, stock receipts transactions have an I punch type as they are coming In to inventory, purchase order transactions are a PO, and requisition transactions are identified with an R punch type.

Date Posted – the date the transaction has been posted to your accounting system through a DATA-MAXX defined ODBC interface.

Date – the date of the transaction

Qty – The quantity or number of this item that was issue

Dept – the location the item transaction was entered for. This is Level 2 on the device.

Job – the job number that was used when the transaction was entered (this is Level 3 on the device).

Extra – this is the data chosen in Level 4 on the PDA or other device. This is a user definable field, and is typically used for the Extra # on the job, or other information that the user has defined to be tracked in the Phase (Extra) table.

Cost Code – this is the data chosen in Level 5 on the PDA or other device. This is a user definable field, and is typically used for the Cost Code # on the job or other information that the user has defined to be tracked in the Cost Code field.

Level 7 – filled if Inventory Tickets was used to generate the transaction. If the device was used to generate it, this field would be blank.

Level 8 – filled if Inventory Tickets was used to generate the transaction. If the device was used to generate it, this field would be blank.

Level 9 – the date and time the transaction was brought into the database is listed in this field.

Method of Delivery – filled with the method of delivery chosen if Inventory Tickets was used to generate the transaction. If the device was used to generate it, this field would be blank.

To go on to the following columns, shift the screen to the right with the scroll bar at the bottom right of the screen.

See your DATA-MAXX sales representative for device differences and the number of fields of information each will collect. The PDA program currently collects 6 fields of data and those fields correspond to fields of the same name on the screens inside the Inventory transactions tabs.   If you program the device to collect the fields that you want to collect and/or export in the PDA setup and configuration, the device will prompt for those fields and once collected, the data for each of the fields will show up in the Inventory tab under the particular transaction type tab. You can also change the names of the fields on the device, as well as on this edit screens.

To add or delete transactions in the edit screens, use the following procedures.

New – use this second row from the top to add a new transaction that did not come from the device. (First row is a filter row)

Delete – use this icon to delete a transaction from the device. Highlight the row to the left of the transaction (grey area to the left of the ID), then hit the Delete icon. If you are deleting multiple time cards at a time, highlight them all, then hit the delete key on the keyboard.

Editing the Data

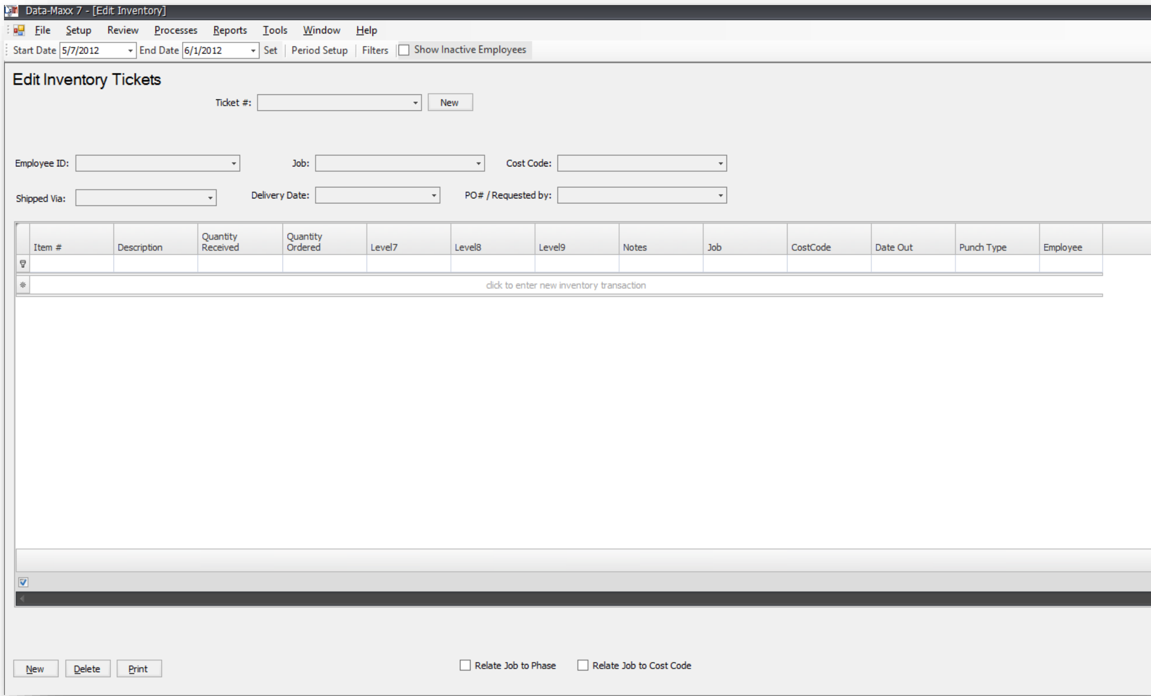
To edit data in any of the transactions, you must first have security rights to edit the data in this screen. If the transaction has not been posted to the accounting system, and you have edit rights, simply click on the field you want to change and then re-key the data or pull the new selection from the drop down list.

Viewing Individual Items

Use the Top Filter row to help find individual items

INVENTORY TICKETS

The Inventory Tickets tab is used for a PC user to create a ticket for items coming in (returns) or going out of inventory (issues) in a format of one job per ticket and prints a picking ticket for the list of items chosen.



Ticket # - Assigned automatically by the system, and includes the date

Picker ID – The employee who is pulling the items being chosen on the ticket.

Job # - Job # the items are being issued to. This is a drop down list of the active jobs in the jobs setup screen.

Cost Code # - this is the cost code being cost for the items being chosen on the ticket.

Shipped Via – how the items are being shipped. A drop down list contains the different shipping methods that can be selected.

Delivery Date – the date of delivery for the items being chosen on the ticket. Click the ... button to the right of the Delivery Date field and you will be able to select the date from a calendar.

PO #/ Requested By – information field for either the PO # or the person requesting the items being issued or returned. This is a text field for entry by the user.

Item # - scan an item or pick it from the drop down. The name of the item then displays.

Qty Received – enter the quantity that was received. This quantity will be the quantity issued in the transaction.

Qty Ordered – enter the quantity, if desired, that was ordered.

Printing the Ticket

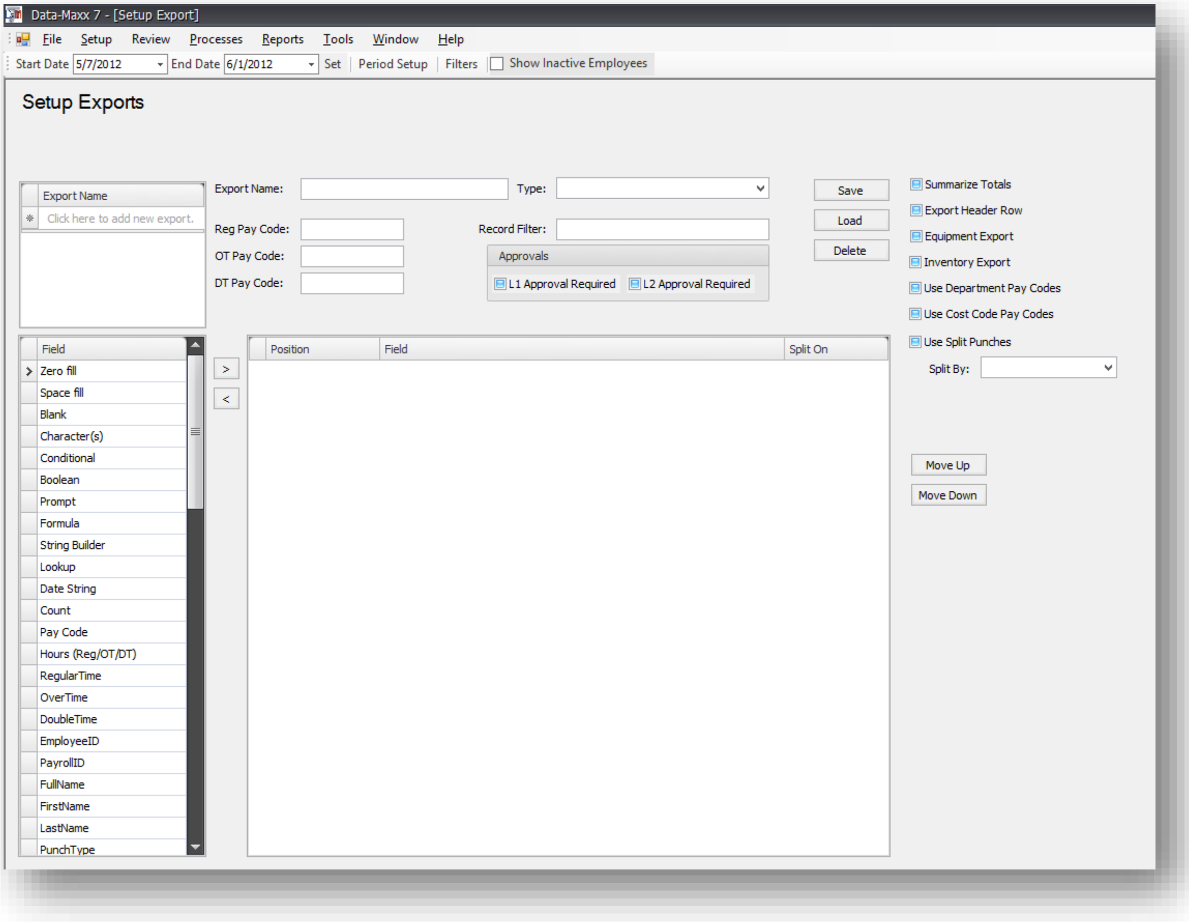
To print the pick ticket, click on the printer icon in the lower left corner of the screen. Printing the ticket must be done in order for the items to be posted to the issues and returns sections.

Viewing a Ticket Already Printed

To choose a ticket that has already been printed, click on the drop down titled Ticket # in the bottom lower left of the screen.

EXPORT DATA

EXPORT DATA



Use the Export Data feature to export records to a system other than DATA-MAXX 7.

You can export the timecards in a wide variety of formats. DATA-MAXX 7 allows you to choose the fields that will be needed in your export. Contact your DATA-MAXX technical representative to see if there is a pre-defined export available that has already been defined for your accounting system. DATA-MAXX 7 is loaded with predefined exports for outside payroll systems that require certain file specifications.

In order to export records to other systems, perform the following:

1. Choose the type of file you wish to export from above.
2. Choose the file type, ASCII (Text), Excel, or Access

3. Choose the delimiter within the file if ASCII is chosen. ASCII files fields are delimited by characters, normally the comma. Choose the delimiter of your ASCII export file.
4. Choose whether you want the header exported in the file. The header is a line at the top of the file denoting the field names.
5. Choose the export fields in your file in the order they appear in the file within the Field window from the available fields. Then hit the > icon to transfer the field to the Selected Fields window.
6. Select whether you want the field to be exported in quotes, and the format of the field.
7. Set up advanced export field criteria if necessary. Advanced export fields allow you to put conditions on the fields, parse data in fields, perform mathematical calculations on fields, and concatenate fields.

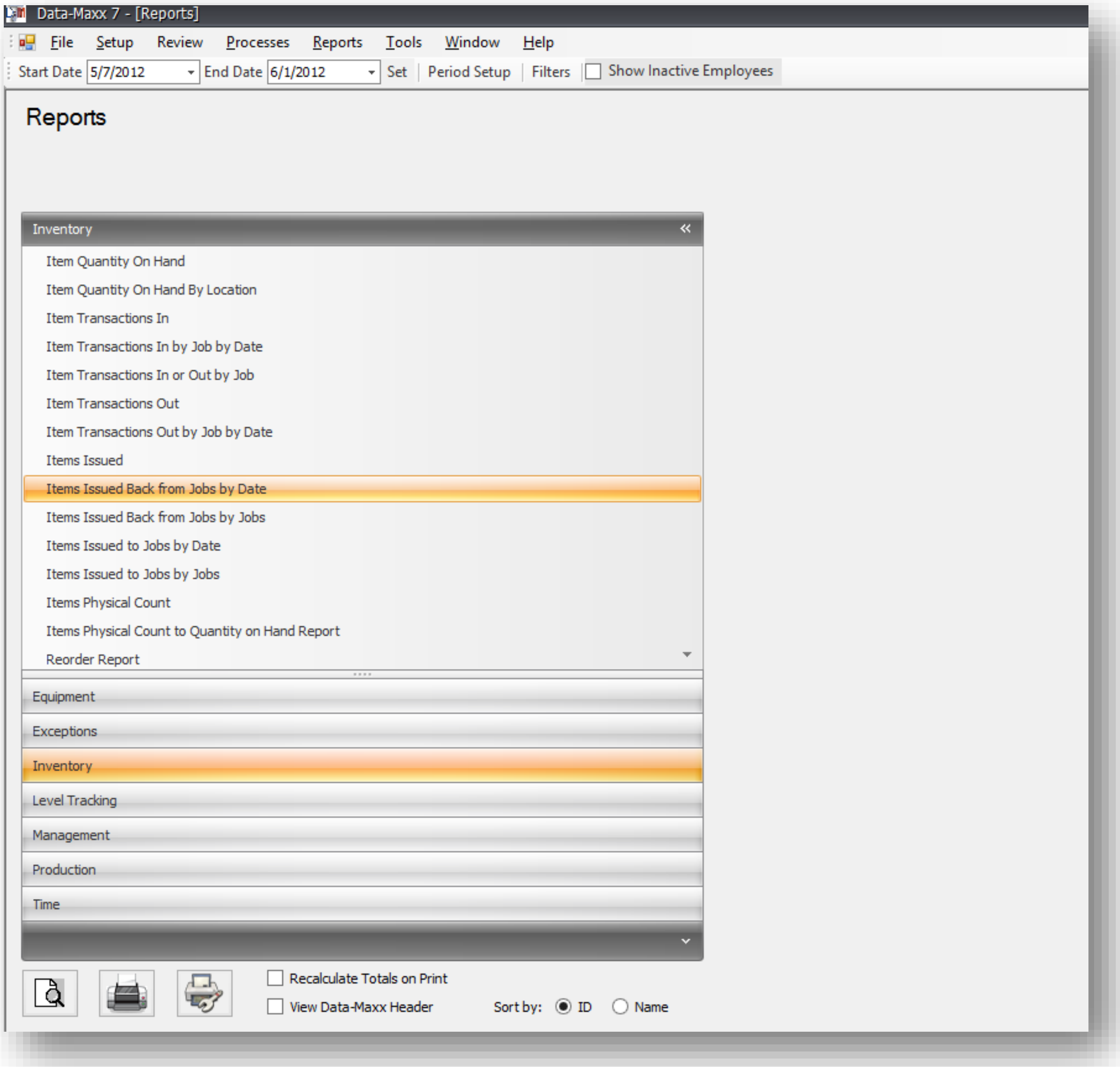
Export Path – choose the path and file for the file you are importing. The path and filename do not save in this screen. It will need to be inputted each time you perform an export, even a predefined export.

Save Export Format – you can save the format of the export you have created with this icon located on the left of the screen.

Once all information is entered, hit the Import Records large icon, left side of screen. The number of records imported will show as Records Added. The screen will show the number of records exported.

REPORTS

Data-Maxx has a variety of inventory reports of the following types:



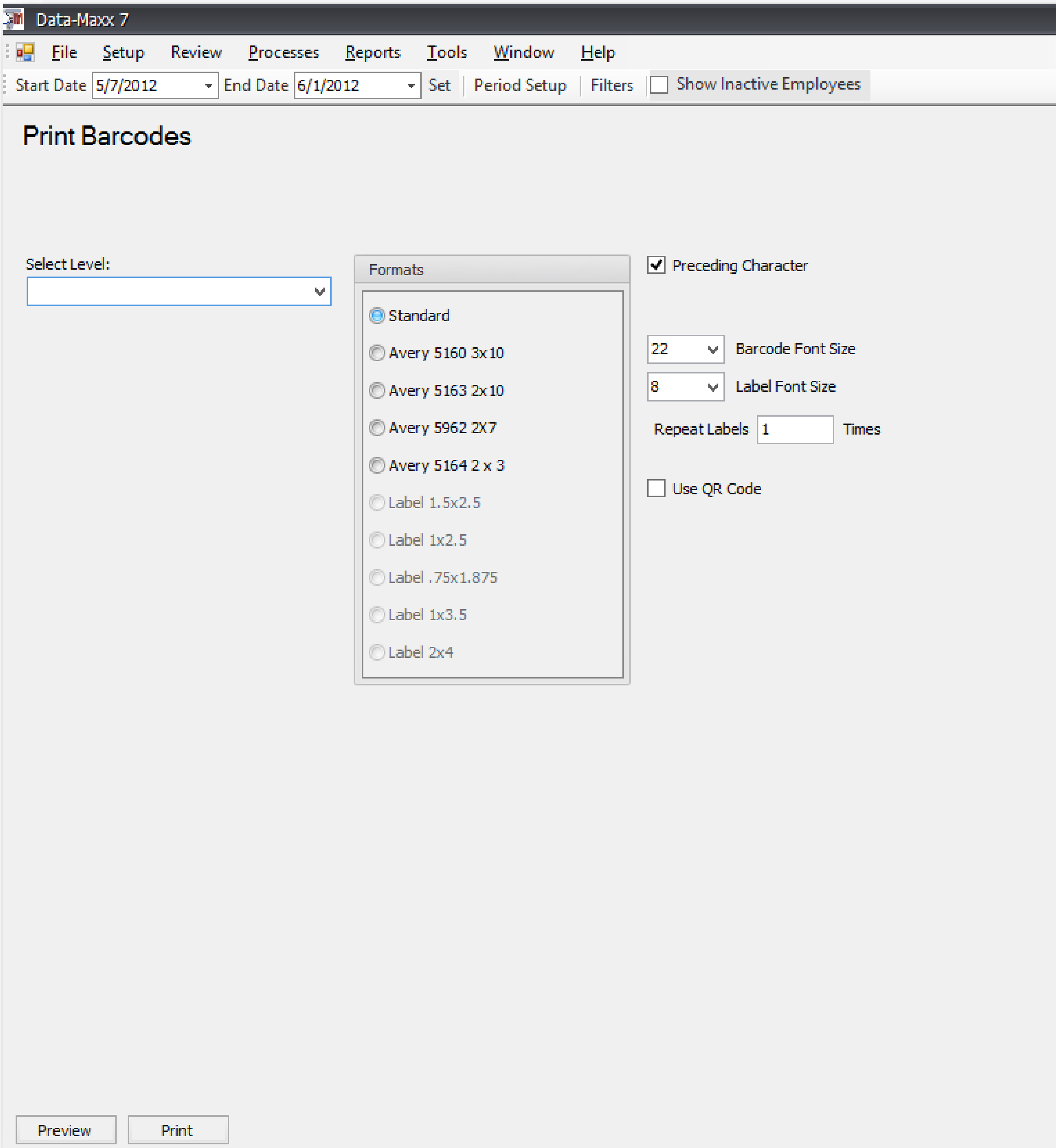
To print the report, go to Reports from the main menu, choose Inventory, and then highlight the report. The report description shows to the right once you select the report.

To print the report, choose your date range, and apply any other filters you may want applied to the data on the report (see Filters section below), choose the Category, choose the Report, and then choose either the Preview Report icon or Print Report icon. Click on the magnifying glass and paper icon to print the report .Then you can hit File, Print to print the report you have previewed.

BAR CODES

To print bar codes:

1. Choose Reports, then the Bar Codes tab
2. Apply filters for the data you want bar codes for (see Filters section below)
3. Choose the file you want to print bar codes for. You can choose employees, jobs, phases, cost codes, work departments (locations), inventory and equipment. The system will print bar codes 3 across, 10 down, in a standard laser label format and only the information you have selected with your filters. You can increase the font size and label size, however, the sizes shown are standards if you choose one of the Avery label options.
4. Preceding character is only used for mobility scanners. Mobility scanners must have the preceding character checkbox checked before printing bar codes.
5. Sort By Description – allows you sort by the description instead of the number. The number is the standard sort when this checkbox is not checked.
6. Either choose the Preview or Print icon. Once you have previewed the report, if that is selected, in order to print it, choose File, Print. If you choose Preview and you then want to print the report you have previewed, click on File and then Print.


Data-Maxx 7
File Setup Review Processes Reports Tools Window Help
Start Date 5/7/2012 End Date 6/1/2012 Set Period Setup Filters Show Inactive Employees
Print Barcodes
Select Level:
Formats
Standard
Avery 5160 3x10
Avery 5163 2x10
Avery 5962 2X7
Avery 5164 2 x 3
Label 1.5x2.5
Label 1x2.5
Label .75x1.875
Label 1x3.5
Label 2x4
Preceding Character
22 Barcode Font Size
8 Label Font Size
Repeat Labels 1 Times
Use QR Code
Preview
Print

CUSTOM LABELS

Custom Labels allow you to change the names of the levels for the following fields: This is found under Tools > Options > Custom Labels

Employee (although this table is where the Items are located, all changes have been made within code so the appropriate heading of Item # is used in all inventory screens and reports. It should not need to be labeled differently in this section).

Division (this is the Class field in Inventory Item Setup)

Department (this is typically Location in an inventory installation and can be re-labeled here to use the term Location instead of Department if desired.

Job

Phase

Cost Code

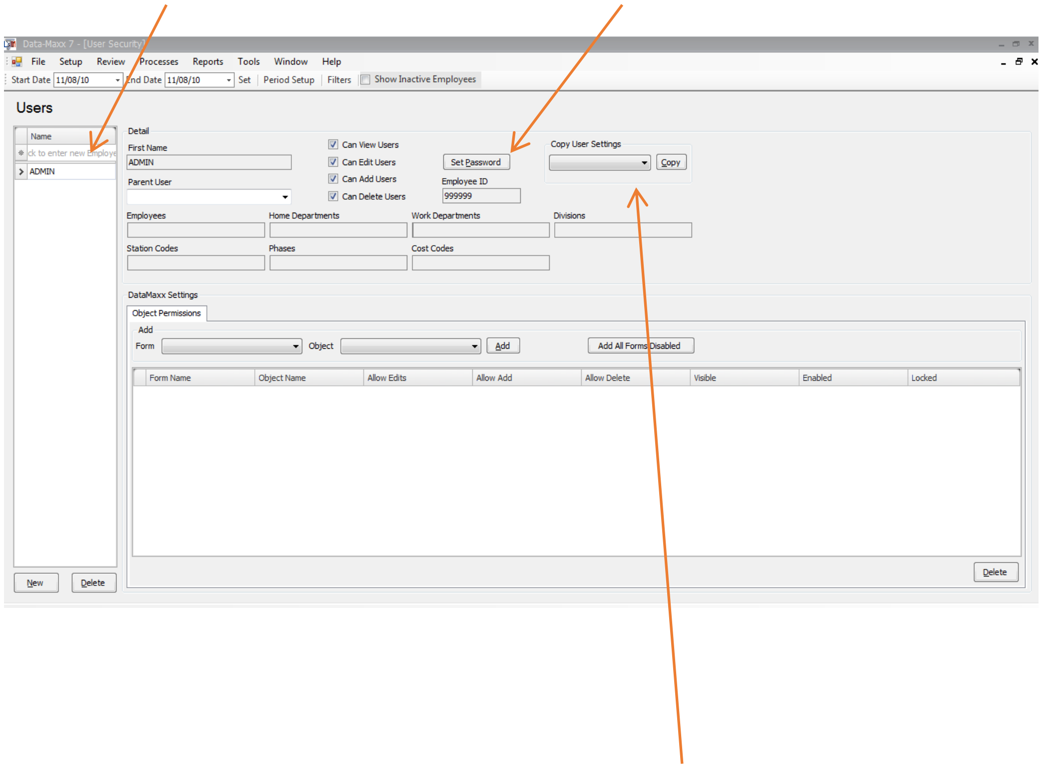
Units

In order to change the labels for these fields, click on the Custom Labels On field, then choose the level you want to change from the drop down list, and then enter the custom name and custom description that you want used for that level. For instance, you may want the Job field to be called Project instead. Then choose the level Job, and enter Project in both fields for name and description.

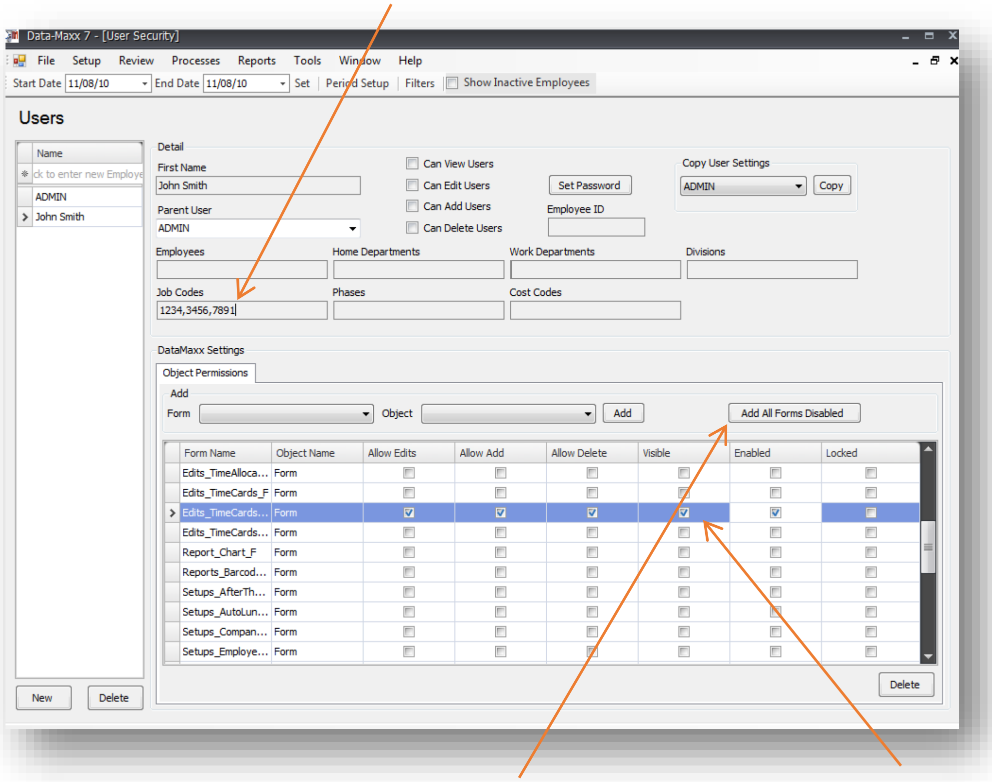
CURRENT USER FILTERS

Security Setup

1. In DM7 go to Tools > Security > Users
2. Add a new user here. After adding the user set the password.



3. You can copy other user’s settings by selecting one in a drop down here.
4. If you only want have the user see certain department, job etc... Add them here. For multiple jobs separate them with commas with no space. For a range use a colon; example 1000:2000



5. To disable forms from being seen by the user click Add all forms disabled and check the forms you want them to see.

FILTERS

Filters are used to view, edit, print or export data for a particular range or set. Use filters to view one employee or group of employees in a range, one job or group of jobs, one phase or group of phases, one cost code or group of cost codes, one department or group of departments, one division or group of divisions, or one shift or group of shifts. You can use the drop down or key in the range you wish to view. This criteria works in conjunction with the data range to view, print or export dataFilters are used for defining the exact data you would like to view, edit, report on, or export. See CHANGING DATE RANGES near the beginning of this manual for changing date ranges and pay period types. You can filter for any of the following fields.

Employee (Used for Items in an inventory installation)

Job (Level 3)

Phase (Level 4)

Cost Code (Level 5)

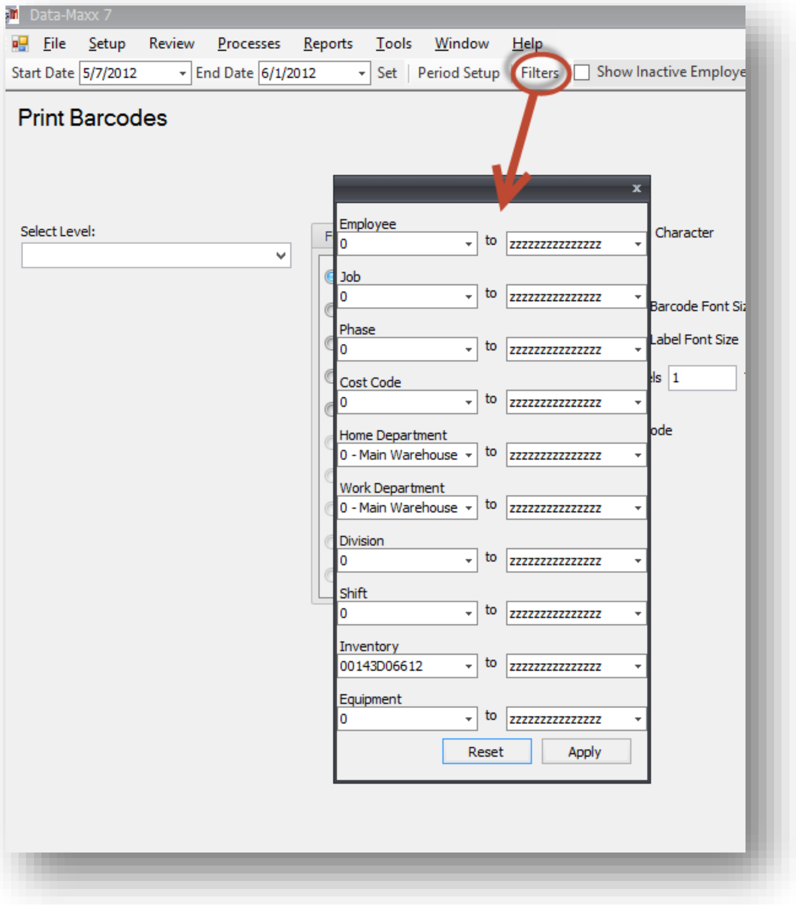
Home Department

Work Department

Division

Shift

In order to change filters, first make sure your date ranges are correct. Then click on the main category, FILTERS, then change the appropriate filters by either finding the data you want in the dropdown list or inputting it. Then click on the Apply Filter button and exist the window. Filters apply to all views, reports, and exports, including printing bar code sheets.



Hitting the More button allows you save filters and apply a particular report header when that filter is used again. This feature can be useful when generating a particular report that you often generate with certain filters. It saves the time of re-inputting the filter along with a particular report header.

Sort numerically is checked when the system is sorting the data alphabetically and you need it to be sorted numerically.

INTEGRATIONS

Integrations of the transactions going back to your accounting system through an ODBC connection, which is a standard in the DATA-MAXX inventory installation, can be set through Windows Task Scheduler to happen at specific timed intervals. See your Windows manual or use Help in Windows to determine settings. Integrations can also be set to happen based on user intervention (manually double clicking on the integration icon). Speak with your DATA-MAXX technical support representative to see how your system has been configured.

We thank you for your purchase of the DATA-MAXX inventory data collection system. If you have any questions or need any additional assistance, please contact our technical support representative online at support@data-maxx.net or at 1-888-995-0184. We will be happy to assist you.