

OnTrak[®]

*Truck Scale Data Management
Version 2*

Operation Manual



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Contents

1.0 Introduction	1
1.1 System Requirements	1
1.2 Installation	2
1.2.1 License	2
1.3 Updates	3
2.0 Starting OnTrak	4
2.1 Operating Modes	4
2.1.1 Administrator mode	4
2.2 User Mode	4
2.3 The OnTrak Screen	5
2.4 Menus	5
3.0 Setting up OnTrak	7
3.1 Application Settings	7
3.2 Scale Settings	10
3.2.1 Scale One	10
3.2.2 Scale Two	11
3.3 Ticket Formatting	12
3.3.1 Templates	13
3.3.2 Ticket Formatting Tokens	13
3.4 Ticket Printing	14
3.5 Creating Users and Permissions	16
3.5.1 Creating a New User and Setting Their Permissions	16
3.5.2 Changing a Password and Permissions	17
3.5.3 Deleting a User	17
4.0 Creating and Modifying Database Information	18
4.1 Customer	18
4.2 Vendors	20
4.3 Product	20
4.4 Creating a New Hauler	21
4.5 Creating a New Truck	22
4.6 Creating a New Job	24
4.7 Creating a New Discount	25
4.8 Modifying Database Information	26
4.9 Deleting Database Information	26
5.0 Making Weighments	27
5.1 Automated Kiosk Mode	28
5.2 Manual Weigh-Ins	29
5.3 Manual Weigh-Outs	29
5.4 Managing In-Process Trucks	29



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6.0 Automated Weighing	30
6.1 Operation Sequence	30
6.2 Processing a Truck	30
6.3 Processing a Truck with Loop Detectors	31
6.4 Additional Prompts	31
6.4.1 Entering a Job ID	31
6.4.2 Entering a Product ID	31
6.4.3 Entering a user Field (1-3)	32
6.4.4 Complete Weighment	32
6.5 Application Setup & Configuration	33
6.6 Hardware Setup	33
6.6.1 Outbound Kiosk	33
6.6.2 Inbound Kiosk	34
7.0 Reports	35
7.1 Viewing and Printing a Report	35
7.2 Viewing/Printing a Transaction Report	36
7.3 Exporting a Report	37
7.3.1 Microsoft and Acrobat Files	37
7.3.2 Export an Extensible Markup Language (XML) Transaction	38
7.3.3 Export a Comma Separated Value (CSV) Transaction	39
8.0 Maintenance	41
8.1 Backing up a Database	41
8.2 Restoring a Database	42
8.3 Resetting Indicator Communications	42



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1.0 Introduction

OnTrak Truck Scale Data Management[™] is a powerful scale data management program. The software tracks customer account information, haulers, trucks, products, discounts and inventory. It allows quick and easy report generation, performs weigh in/out, stored tare and keyed tare transactions. It also offers a web kiosk for drivers who use wireless devices such as smart phones and tablets.

OnTrak can connect with most Rice Lake indicators and supports both Windows® and serial printers.

The *OnTrak Truck Scale Data Management* software can be downloaded from the Rice Lake website.



Manuals are available for viewing and/or downloading from the Rice Lake Weighing Systems website at www.ricelake.com/manuals

Warranty information can be found on the website at www.ricelake.com/warranties

OnTrak uses a simple approach for processing transactions. Features include:

- Weigh ticket processing
- Hauler and product information
- Report generation by criteria selection
- Customer-specific, product-specific, and job specific rates and surcharges
- Inventory management based on shipping and receiving transactions
- Scale interface
- Interface to serial and Windows printers

1.1 System Requirements

Refer to the Rice Lake website for system requirements.



1.2 Installation

1. Download the *OnTrak Truck Scale Data Management* program, extract the zip file and double click on the *OnTrak.Installer.exe* file. The *Open File - Security Warning* popup displays.

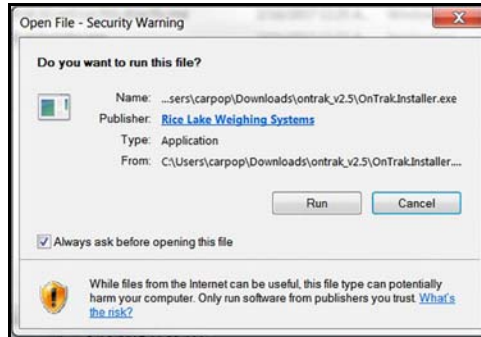


Figure 1-1. Security Warning

2. Press .
3. Read the *Rice Lake Weighing Systems License Agreement*. Check the box below agreement if the terms are acceptable.
4. Press , then to install the program in the desired location.
5. Press . Display returns to setup *Rice Lake Weighing Systems License Agreement*.
6. Press . If not already installed on the PC, Microsoft SQL Server^{®2} 2012-Express Edition installs. A *Database Installer* displays.



Figure 1-2. Rice Lake Weighing Systems License Agreement

7. Press , confirm the *SQL Server Name*.
8. Select the appropriate radio buttons for the *Remote SQL Server Security* and *Action* areas of the display.
 - To authenticate the SQL server, select the SQL Authentication radio button and enter a user name and password. This is only required if connecting to a remote SQL Server. For assistance, contact the IT department.
 - If creating a new database, check the box under it if sample data is desired.
 - If using an existing database, select it from a pull-down menu. The default database is *RLWS_OnTrak*.
9. Press . *Installation Complete* popup displays.
10. Press . *OnTrak* is successfully installed.



Figure 1-3. Database Installer

If there were errors during installation, contact Rice Lake Weighing Systems support.

1.2.1 License

OnTrak initially installs in demo mode and a *Machine ID* number is displayed. Record this number, it must be provided when contacting Rice Lake Weighing Systems to unlock the program. Once unlocked all of its features will be available.

1. Call Rice Lake Weighing Systems Sales or tech support at 800-472-6703 to purchase the full version of *OnTrak Truck Scale Data Management*.
2. Provide them with the sales order number and machine ID number. Then a license file will be provided.
3. Place this file in the installation directory, (typically C:\Program Files\Rice Lake Weighing Systems\OnTrak unless a different location was specified during installation).
4. Reopen the *OnTrak* program. Once the license file is in the correct location the full version of *OnTrak* will be unlocked.

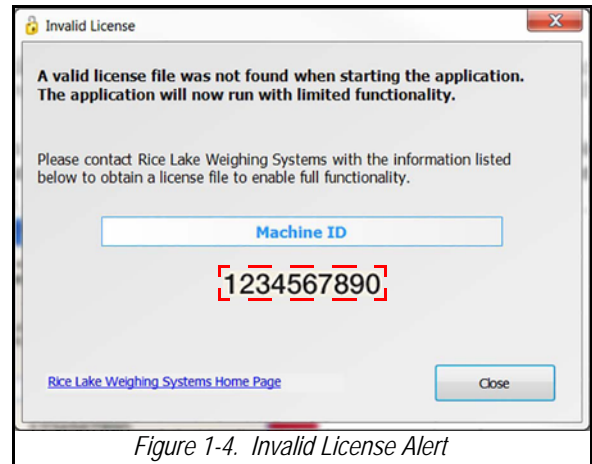


Figure 1-4. Invalid License Alert

IMPORTANT

The license file is specific to the PC it is installed on only. Each PC required to run the program must have its own separate purchased license file.

2.0 Starting OnTrak

OnTrak can be launched from the following location: **Start » Programs » Rice Lake Weighing Systems » OnTrak Truck Scale Data Management.**

2.1 Operating Modes

OnTrak has two modes of operation. The available functions differ depending on the mode that is logged in to.

2.1.1 Administrator mode

Administrator mode allows full control of *OnTrak*. Many of the features described in this manual may require being in administrator mode. Log on using the User Name and Password below, both are case sensitive:

User name – Administrator

Password – password

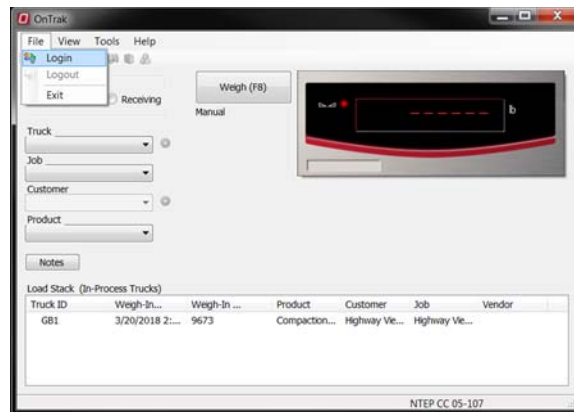


Table 2-1. Default Administrator Login.

2.2 User Mode

If logged in as a user, there is only access to make weighments and add transient trucks. The *OnTrak* database cannot be modified nor view reports. See [Section 3.5 on page 16](#).

2.3 The OnTrak Screen

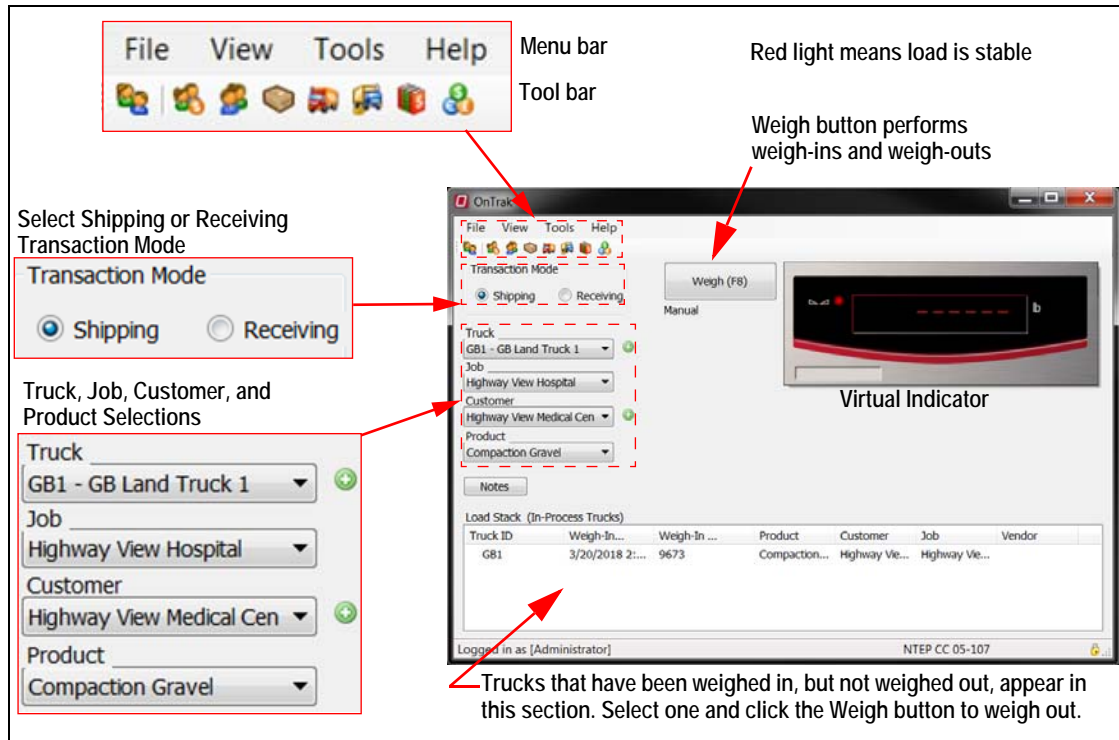


Figure 2-1. OnTrak Truck Scale Data Management Main Screen.

2.4 Menus

File Menu	Function
Login	Prompts to enter a user name and password to log into <i>OnTrak Truck Scale Data Management</i> .
Logout	Logs the user out of <i>OnTrak Truck Scale Data Management</i> .
Exit	Closes the program.
View Menu	Function
Users	Opens <i>Users</i> dialog box; users can be added, deleted and modified
Customers	Opens <i>Customer Report</i> dialog box; add, delete, modify and search customers; run a report to be viewed and printed
Vendor	Opens <i>Vendors</i> dialog box; add, delete, modify and search vendors; run a report to be viewed and printed
Products	Opens <i>Select Product</i> dialog box; add, delete, modify and search products; run a report to be viewed and printed
Haulers	Opens <i>Haulers</i> dialog box; add, delete, modify and search haulers; a report can be viewed and printed
Trucks	Opens <i>Trucks</i> dialog box; add, delete, modify and search trucks; a report can be viewed and printed
Jobs	Opens <i>Select Job</i> dialog box, add, delete, modify and search jobs; a report can be viewed and printed
Discounts	Opens <i>Discounts</i> dialog box, add, delete, modify and search discounts; a report can be viewed and printed
Reports » Customer	Access <i>Customer Report</i> dialog box; criteria can be entered and reports can be viewed/saved/printed
Reports » Hauler	Access <i>Hauler Report</i> dialog box; criteria can be entered and a reports can be viewed/saved/printed.
Reports » Product	Access <i>Product Report</i> dialog box; criteria can be entered and a reports can be viewed/saved/printed.
Reports » Truck	Access <i>Truck Report</i> dialog box; criteria can be entered and a reports can be viewed/saved/printed.
Reports » Job	Access <i>Job Report</i> dialog box; criteria can be entered and a reports can be viewed/saved/printed.
Reports » Discounts	Access <i>Discount Schedule Report</i> dialog box, where criteria can be entered and a reports can be viewed/saved/printed.
Reports » Shipping Transactions	Access <i>Transaction Report</i> dialog box, where criteria can be entered and a reports can be viewed/saved/printed. See Section 7.2 on page 36

Table 2-2. Menus and Functions

File Menu	Function
Reports » Receiving Transactions	Access <i>Transaction Report</i> dialog box; criteria can be entered and a reports can be viewed/saved/printed See Section 7.2 on page 36
Reports » Shipping Usage Reports » By Product...	Access <i>Usage By Product (Shipping)</i> report; displays quantity of selected product shipped during time frame selected
Reports » Shipping Usage Reports » By Customer...	Accesses the <i>Usage By Customer (Shipping)</i> report, displays quantity of loads/total/units of product a selected customer has been shipped in time frame selected
Reports » Shipping Usage Reports » By Truck...	Accesses the <i>Usage By Truck (Shipping)</i> report, displays quantity of loads/total/units of product a selected truck has used in time frame selected
Reports » Shipping Usage Reports » By Hauler...	Accesses the <i>Usage By Hauler (Shipping)</i> report, displays quantity of loads/total/units of product a selected hauler has used in time frame selected
Reports » Shipping Usage Reports » By Job/Customer...	Accesses the <i>Usage By Job/Customer (Shipping)</i> report, displays quantity of products, loads and total units used by job and customer.
Reports » Shipping Usage Reports » By Job/Vendor...	Accesses the <i>Usage By Job/Vendor (Shipping)</i> report, displays quantity of products, loads, and total units used by job and vendor.
Reports » Receiving Usage Reports » By Product...	Accesses the <i>Usage By Product (Receiving)</i> report, displays quantity of a selected product received during time frame selected.
Reports » Receiving Usage Reports » By Customer...	Accesses the <i>Usage By Customer (Receiving)</i> report, displays quantity of loads/total/units of product received from a selected customer in time frame selected.
Reports » Receiving Usage Reports » By Truck...	Accesses the <i>Usage By Truck (Receiving)</i> report, displays quantity of loads/total/units of product received from a selected truck in time frame selected.
Reports » Receiving Usage Reports » By Hauler...	Accesses the <i>Usage By Hauler (Receiving)</i> report, displays quantity of loads/total/units of product received from a selected hauler in time frame selected.
Reports » Receiving Usage Reports » By Job/Customer...	Accesses the <i>Usage By Job/Customer (Receiving)</i> report, displays quantity of products, loads and total units received by job and customer.
Reports » Receiving Usage Reports » By Job/Vendor...	Accesses the <i>Usage By Job/Vendor (Receiving)</i> report, displays quantity of products, loads and total units received by job and vendor.
Manage In-Process Trucks	Opens a dialog box showing all in-process trucks, allowing the removal of them from the load stack.
Tools Menu	Function
Export Transactions...	Opens the <i>Export Transactions</i> wizard; exports selected criteria to an .XML file.
Export Transactions to CSV	Opens the <i>Export Transactions</i> wizard; exports selected criteria to a CSV file.
Reprint Transaction Ticket	Reprints the last transaction ticket.
Void Transaction...	Opens the <i>Void a Transaction</i> dialog box, which allows a search for and void transactions.
Zero Scale One	Zeros scale
Zero Scale Two	Zeros scale
Options	Accesses the <i>Options</i> dialog box, where application settings, scale settings, and ticket settings are set. See Section 3.0 on page 7 for more information.
Help Menu	Function
Contents	Opens this help file.
Reset Indicator Communications	If communications with the indicator are lost, use this feature to reset them.
Unattended Kiosk Monitor	Allows user to monitor communication with remote kiosk; troubleshoot communication and other issues
About	Opens the <i>About</i> dialog box, displaying program information.

Table 2-2. Menus and Functions (Continued)



3.0 Setting up OnTrak

Before using *OnTrak Truck Scale Data Management*, specify application settings, scale and communication options and ticket formatting preferences.

3.1 Application Settings

1. Expand the *Tools* menu and select *Options*. The *Options* dialog box displays.
2. Expand the *Application* menu, if needed.

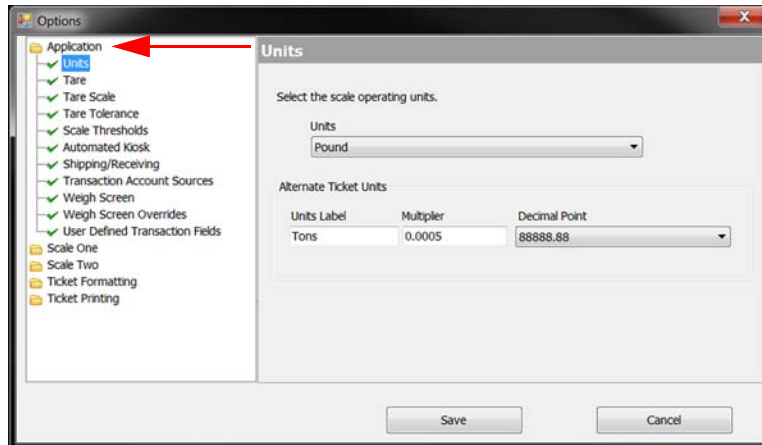


Figure 3-1. Options Dialog Box

3. Select *Units*. The units set on the indicator must match the units set in *OnTrak*. If they do not match, *OnTrak*'s readout will display: *Indicator Sending Incorrect Units*.
4. Expand the *Units* pull-down menu and select the units that match the indicator's setting.

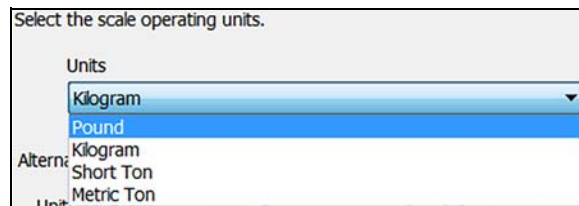


Figure 3-2. Select Units

5. Select *Tare*. Tare age determines the amount of time (in business days) to allow before a stored tare expires, at which time a warning is displayed, alerting the operator of an expired tare.
6. Enter number of days desired, in the *Tare Age* text box, before a stored tare expires. Business days only, do not include weekends

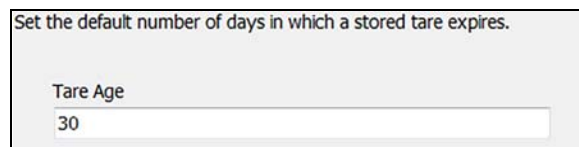


Figure 3-3. Tare Age

7. Select *Tare Scale*. Settings under the Tare Scale selection apply to only two-scale systems.
8. Select scale to be used to capture tare values.

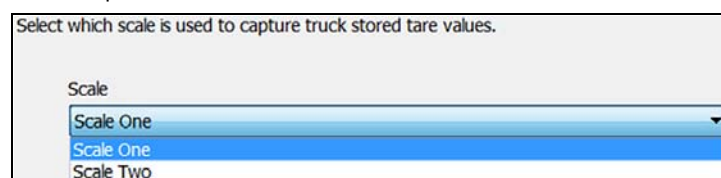


Figure 3-4. Select Scale

9. Select **Tare Tolerance**. Enable or disable tare tolerance by marking the check box. If enabled, enter the desired tolerance value percentage.

Figure 3-5. Tare Tolerance

10. Select **Scale Thresholds**. Set the weight threshold that allows the operator to process a new transaction on the scale.
11. Enter the scale reset weight in the **Scale Reset Weight** text box.

Figure 3-6. Scale Threshold

12. Select **Automated Kiosk**.
13. Use the text boxes to enter the weight threshold that indicates that a truck is on the scale, and the maximum amount of time (in seconds) to wait for a value to be entered.

Figure 3-7. Automated Kiosk Settings.

14. Select **Shipping/Receiving**.
15. From the **Transaction Mode** pull-down menu, select **Shipping** or **Receiving** to be the default transaction mode. This will determine which is selected automatically with each new transaction.

Figure 3-8. Shipping and Receiving

16. Using the radio buttons, select the mode to be used to calculate charges. Select:
 - **Shipping** if there is a charge for product leaving the facility
 - **Receiving** if there is a charge for product entering the facility

17. Select Weigh Screen.

Select weigh screen options.

- Show inactive trucks in weigh screen truck list.
- Show uninsured trucks in weigh screen truck list.
- Show closed jobs in weigh screen job list.
- Show inactive customers in weigh screen customer list.
- Show inactive products in weigh screen product list.
- Display a notification if an uninsured truck performs a weighing operation.

Figure 3-9. Weigh Screen

18. Check or un-check the boxes to customize the appearance of the weigh screen.

19. Select Weigh Screen Overrides. Check or un-check the boxes to customize settings.

- Allow the ticketing operator to allow an overweight truck to perform a transaction.
- Allow the ticketing operator to allow an uninsured truck to perform a transaction.
- Allow reprinting of transaction tickets.

Figure 3-10. Weigh Scree Overrides

20. Select User Defined Transaction Fields.

21. Use the text boxes to label any user defined fields. Mark the check box to prompt for data on inbound and outbound weighments.

Enter the labels for the user defined transaction fields.

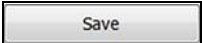
User Defined Field 1 Label

User Defined Field 2 Label

User Defined Field 3 Label

Prompt for data on Inbound as well as Outbound weighments.

Figure 3-11. User Defined Transactions

22. Press  when all application settings are set as desired.

3.2 Scale Settings

OnTrak may be using a one- or two-scale system. If using a two-scale system, both scales need to be configured. If using a one-scale system, ignore *Scale Two* options.

3.2.1 Scale One

1. Expand the *Tools* menu and select *Options*. The *Options* dialog box displays.
2. Expand the *Scale One* menu.

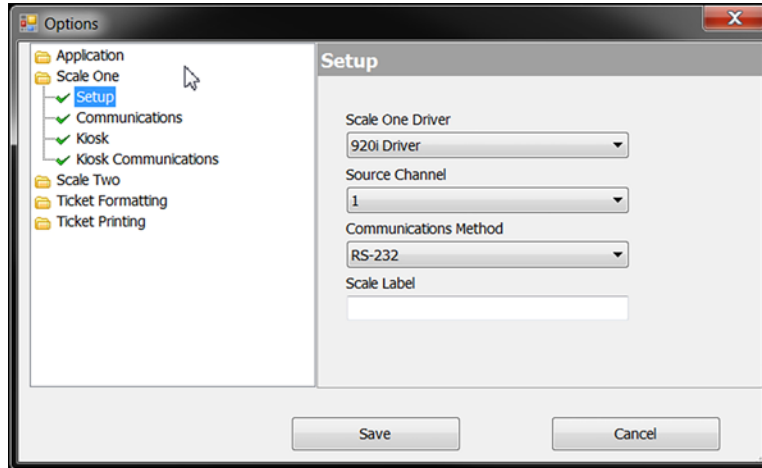


Figure 3-12. Setup Dialog Box

3. Select *Setup*.
4. Expand the *Scale One Driver* menu and select the indicator connected to scale one.
5. Expand the *Source Channel* menu and select the desired channel to use.



Note Channel selection options will vary depending on which indicator is selected in Step 4. If using an indicator with multiple channels, and a two-scale system, select one channel for scale one and a different channel for scale two.

6. Expand the *Communications Method* menu, select whether the indicator is connected via *RS-232* or *TCP/IP*.
7. Enter the desired name for the scale in the *Scale Label* text box.
8. Select *Communications*.
9. Specify the correct communications options. The options available will depend on whether RS-232 or TCP/IP are selected.

Comm Port [Dropdown]	Baud Rate 9600 [Dropdown]	IP Address 127.0.0.1 [Text Box]
Data Bits 8 [Dropdown]	Parity None [Dropdown]	Tcp Port 10001 [Text Box]
Stop Bits One [Dropdown]		
RS-232 Options		TCP/IP Options

Figure 3-13. Communication Settings

10. Select **Kiosk**.
11. Check the box **Enable Automated Kiosk for Scale One**.
12. Use the pull-down menus to specify the kiosk communications method, printer driver, and Windows printer name.

Figure 3-14. Kiosk Configuration

13. Select **Kiosk Communications**. The options displayed depend on the kiosk communications method selected.
14. Specify the correct communications options. The options available will depend on whether RS-232 or TCP/IP are selected.

Figure 3-15. Kiosk Communications Settings

3.2.2 Scale Two

Follow the steps in [Section 3.2.1](#) for *Scale Two* setup.

3.3 Ticket Formatting

OnTrak supplies an editor to format the inbound and outbound tickets, as well as audits that can be set to print any additional information at weigh-out. Use the ticket editor's tool bar buttons to insert pre-coded tokens, or manually enter them using the tokens from [Section 3.3.2 on page 13](#).



Figure 3-16. Ticket Editors Tool Bar Icons

Icon No.	Inserts
1	Gross Weight
2	Tare Weight
3	Net Weight
4	Net Weight Alternate Units
5	Transaction Date and Time (use pull-down menu for more options)
6	Transaction Notes (use pull-down menu for more options)
7	Customer ID (use pull-down menu for more options)
8	Vendor ID (use pull-down menu for more options)
9	Product ID (use pull-down menu for more options)
10	Job ID (use pull-down menu for more options)
11	Truck ID (use pull-down menu for more options)
12	ASCII Character
13	Font Selection

To set the ticket format:

1. Expand the **Tools** menu and select **Options**. The **Options** dialog box displays.
2. Expand the **Ticket Formatting** menu.

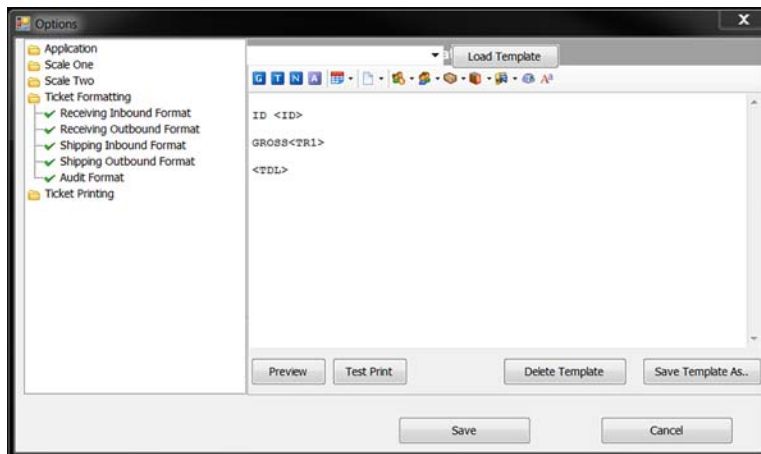


Figure 3-17. Ticket Formatting

3. Select **Receiving Inbound Format**. The ticket editor displays.
4. Using the tool bar buttons, insert pre-coded variables as desired.
5. Press to view how the ticket will look, a print preview box displays.
6. Press to print the code.



Note Set the **Receiving Outbound Ticket**, **Shipping Inbound**, **Shipping Outbound**, and **Audit Formats**, using the same steps used to set **Receiving Inbound Format**.



3.3.1 Templates

To avoid having to build the same format each time it is needed, format templates can be saved and imported the next time it is needed. They can also be deleted once they are no longer useful.

- Use the drop down menu to select a saved template. Press  to load it.
- Press  to save a template
- Press  to delete a template

3.3.2 Ticket Formatting Tokens

Token	Will insert...
<@nnn>	ASCII character value in the ticket. Valid values for 'nnn' are between 0 and 255.
<ALNETUNITS>	Alternate Units
<ALNETWTGT>	Net Weight Alternate Units (No Units)
<AMOUNTDUE>	The amount due for this transaction
<CU>	Customer ID, if applicable
<CUSTBILLADDRRCITY>	Customer Bill To Address City
<CUSTBILLADDRRCOUNTRY>	Customer Bill To Address Country
<CUSTBILLADDRRLINE1>	Customer Bill To Address Line 1
<CUSTBILLADDRRLINE2>	Customer Bill To Address Line 2
<CUSTBILLADDRRLINE3>	Customer Bill To Address Line 3
<CUSTBILLADDRRPOSTAL>	Customer Bill To Address Postal Code
<CUSTBILLADDRRSTATE>	Customer Bill To Address State/Province
<CUSTCONTACT>	Customer Contact Name
<CUSTDISCNAME>	Customer Discount Name
<CUSTDISCRATE>	Customer Discount Rate
<CUSTFAX>	Customer Fax
<CUSTNAME>	Customer Name
<CUSTNOTES>	Customer Notes
<CUSTPHONE>	Customer Phone
<CUSTSHIPADDRRCITY>	Customer Ship To Address City
<CUSTSHIPADDRRCOUNTRY>	Customer Ship To Address Country
<CUSTSHIPADDRRLINE1>	Customer Ship To Address Line 1
<CUSTSHIPADDRRLINE2>	Customer Ship To Address Line 2
<CUSTSHIPADDRRLINE3>	Customer Ship To Address Line 3
<CUSTSHIPADDRRPOSTAL>	Customer Ship To Address Postal Code
<CUSTSHIPADDRRSTATE>	Customer Ship To Address State/Province
<DA>	Transaction Date in the format of 'MM/dd/yy'
<DA4>	Transaction Date in the format of 'MM/dd/yyyy'
<DELIVERYADDRRCITY>	Delivery Address City
<DELIVERYADDRRCOUNTRY>	Delivery Address Country
<DELIVERYADDRRLINE1>	Delivery Address Line 1
<DELIVERYADDRRLINE2>	Delivery Address Line 2
<DELIVERYADDRRLINE3>	Delivery Address Line 3
<DELIVERYADDRRPOSTAL>	Delivery Address Postal Code
<DELIVERYADDRRSTATE>	Delivery Address State/Province
<HAULERADDRRCITY>	Hauler Address City
<HAULERADDRRCOUNTRY>	Hauler Address Country
<HAULERADDRRLINE1>	Hauler Address Line 1
<HAULERADDRRLINE2>	Hauler Address Line 2
<HAULERADDRRLINE3>	Hauler Address Line 3
<HAULERADDRRPOSTAL>	Hauler Address Postal Code
<HAULERADDRRSTATE>	Hauler Address State/Province

Table 3-1. Ticket Formatting Tokens

Token	Will insert...
<HAULERCONTACT>	Hauler Contact Name
<HAULERFAX>	Hauler Fax
<HAULERNAME>	Hauler Name
<HAULERPHONE>	Hauler Phone
<ID>	Truck ID
<JB>	Job ID, if applicable
<JOBCLOSED>	Indicates CLOSED if the job is closed, blank if not.
<JOBDAILYTOTAL>	The amount of product delivered on the job for the current day.
<JOBDELIVERED>	The amount of product remaining on the job for the product specified in the transaction.
<JOBNAME>	Job Name
<JOBNOTES>	Job Notes
<JOBORDERED>	The amount of product remaining on the job for the product specified in the transaction.
<JOBREMAINING>	The amount of product remaining on the job for the product specified in the transaction.
<NLxx>	New Line (carriage return and line feed) (xx = number of spaces; i.e., <NLxx> would insert two new lines).
<NONTAXABLECHARGES>	The list of non-taxable charges. This includes charges from Customer, Product, and Job.
<NONTAXABLESUBTOTAL>	The subtotal of non-taxable charges
<NP>	Calculated Net Product Price, adjusted for special job pricing and customer discount, if applicable.
<PR>	Product ID, if applicable
<PRODESC>	Product Description
<PRODMINCHARGE>	Product Minimum Charge
<PRODNAME>	Product Name
<PRODNOTES>	Product Notes
<PRODPRIICE>	Product List Price
<PRODPRIICEUNIT>	Product Price Unit of Measure
<SP>	Space
<SPxx>	Multiple spaces (xx = number of spaces; i.e., <SPxx> would insert two spaces).
<TAXABLECHARGES>	The list of taxable charges. This includes charges from Customer, Product, and Job.
<TAXABLESUBTOTAL>	The subtotal of taxable charges.
<TAXES>	The list of taxes
<TAXSUB>	The subtotal of taxes
<TD>	Transaction Time and Date in the format of 'h:mm AM/PM MM/dd/yy'
<TD4>	Transaction Time and Date in the format of 'h:mm AM/PM MM/dd/yyyy'
<TDL>	Transaction Time and Date formatted per Windows Short Time and Short Date regional settings.
<TI>	Transaction Time in the format of 'h:mm AM/PM'
<TR1>	Truck Gross Weight
<TR1WGT>	Truck Gross Weight (No Units)
<TR2>	Truck Tare Weight (Includes KEYED, RECALLED, and INBOUND as appropriate).
<TR2WGT>	Truck Tare Weight (No Units)
<TR3>	Truck Net Weight
<TR3WGT>	Truck Net Weight (No Units)
<TRAILER1ID>	Trailer 1 ID
<TRAILER2ID>	Trailer 2 ID
<TRAILER3ID>	Trailer 3 ID
<TRANID>	Transaction ID
<TRANSNOTES>	Transaction Notes
<TRUCKNAME>	Truck Name
<TRUCKTAREACQ>	Truck Tare Acquired Date
<TRUCKTAREEXP>	Truck Tare Expiration Date
<USER>	The name of the user/operator that performed the transaction.

Table 3-1. Ticket Formatting Tokens (Continued)

3.4 Ticket Printing

Specify what type of printer (Windows printer or serial printer) being using. If using a serial printer, also specify its communication settings. Different printers can be set for the tickets and audits.



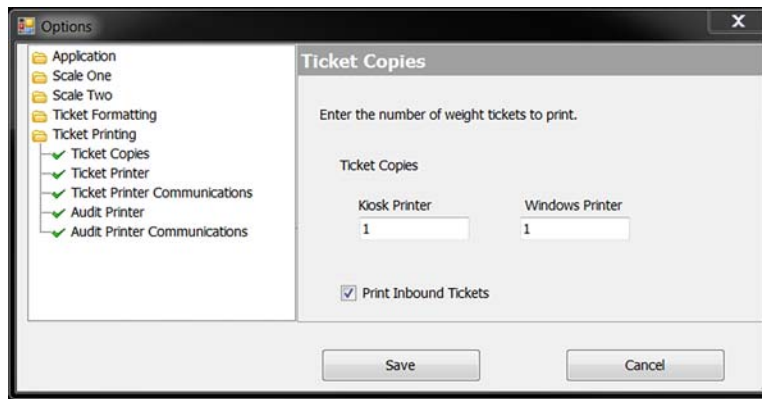


Figure 3-18. Ticket Printer Screen

1. Expand the **Tools** menu and select **Options**. The **Options** dialog box displays.
2. Expand the **Ticket Printing** menu and select **Ticket Copies**.
3. Enter the number of weight tickets to print.
4. Check the box to print inbound tickets, if needed.
5. Select **Ticket Printer**.

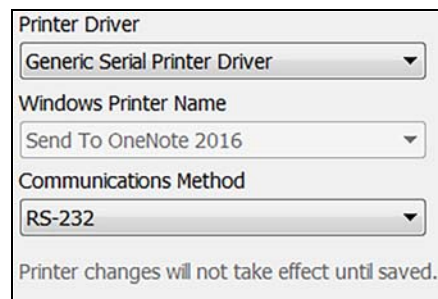


Figure 3-19. Ticket Printer Settings

6. Expand the **Printer Driver** menu and select either the Windows printer (Windows Printer Driver) or a serial printer (Generic Serial Printer Driver).
7. For a Windows printer, expand the **Windows Printer Name** menu to select a printer. All printers installed on the computer are listed. Skip to [Step 10](#).
For a serial printer, expand the **Communications Method** menu and select whether it is connected via RS-232 or TCP/IP.
8. For a serial printer, select **Ticket Printer Communications**.
9. Specify the correct communications options. The options available will depend on whether RS-232 or TCP/IP are selected.

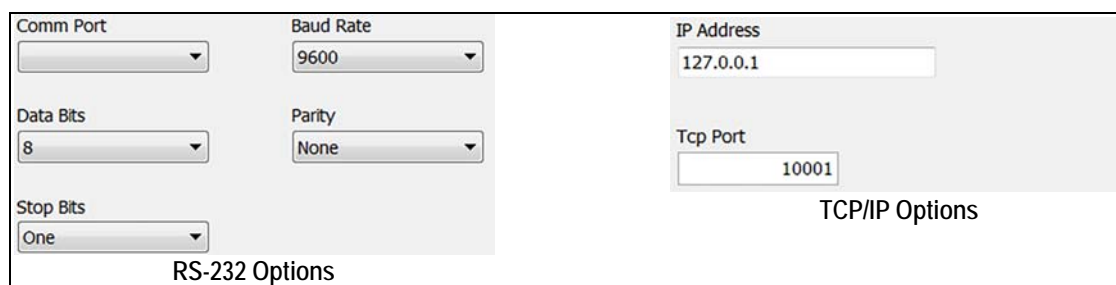
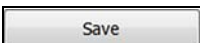


Figure 3-20. Communication Settings

10. Select **Audit Printer**.
11. Expand the **Printer Driver** menu and select either the Windows printer (Windows Printer Driver) or a serial printer (Generic Serial Printer Driver).
12. If using a Windows printer, expand the **Windows Printer Name** menu to select a printer. All printers installed on the computer are listed. Skip to [Step 15](#).
If using a serial printer, expand the **Communications Method** menu, select whether it is connected via RS-232 or TCP/IP.
13. If using a serial printer, select **Audit Printer Communications**.
14. Specify the correct communications options. The options available will depend on whether RS-232 or TCP/IP are selected.

Figure 3-21. Communication Settings

15. Press  when all application settings are set as desired.

3.5 Creating Users and Permissions

When logged in as the administrator, create new users and set their permissions as having either administrator or user rights. User rights disable all features except for making a weighments. [Table 3-2](#) contains the default administrator login. To change the password, see [Section 3.5.2 on page 17](#).

User name	Administrator
Password	password

Table 3-2. Default Administrator Login.

3.5.1 Creating a New User and Setting Their Permissions


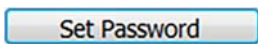
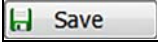
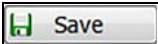

1. Expand the **View** menu and select **Users**. Or press the **Users** icon on the tool bar. The **Users** dialog box displays.
2. Press . The **Edit User** dialog box displays.


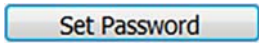



Figure 3-22. Edit User Dialog Box

3. Type a name in the **User Name** text box. This will be the user's log-in name.
4. Press  to assign a password. The **Set Password** dialog box displays.
5. Enter the desired password in the **New Password** text box and enter the same password in the **Confirm Password** text box.

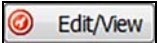

6. Press .
7. Check the box in the **Roles** section to the desired permissions.
8. Ensure there are no errors in the **Broken Rules** section.
9. Press .
10. Press  to return to the main screen.

3.5.2 Changing a Password and Permissions

OnTrak allows a user's permissions and/or password to be changed. The user name cannot be modified; a new one must be created.

1. Expand the **View** menu and select **Users**. Or press the **Users** icon on the tool bar. The **Users** dialog box displays.
2. Select the user name to modify.
3. Press . The **Edit User** dialog box displays.
4. Press  to assign a new password. The **Set Password** dialog box displays.
5. Enter the desired password in the **New Password** text box and enter the same password in the **Confirm Password** text box.
6. Press .
7. Check the box next to the desired permissions, in the **Roles** section.
8. Press .
9. Press  to return to the main screen.

3.5.3 Deleting a User

1. Expand the **View** menu and select **Users**. Or press the **Users** icon on the tool bar. The **Users** dialog box displays.
2. Select the user name to delete.
3. Press . A confirmation dialog box appears.
4. Press **Yes** to delete, the user name no longer appears in the list.
5. Press  to return to the main screen.

4.0 Creating and Modifying Database Information

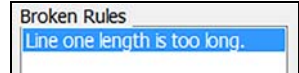
OnTrak's database allows the storage of information for customers, products, haulers, trucks, jobs, and discounts. The system must be logged in as a user with administrator permissions to create or modify database information.

When creating or modifying database information, a consistent element of the dialog boxes is the **Broken Rules** section. When modifying database information, the **Search** function can be used. These two features are described below.

Broken Rules Section

This appears in any dialog box where database information is entered.

The **Broken Rules** section displays error messages during database information creation.



Search Function

When making a selection from the **View** menu (excluding **Users**), a dialog box similar to that shown in [Figure 4-1 on page 18](#) will appear. To quickly locate an item, it is recommended to use the **Search** function. To do so, in the **Search Text** text box, type a keyword matching the item to retrieve and press the **Search** button. This will display only items matching the keyword. To view all items (e.g., all customers), leave the **Search Text** text box blank and press the **Search** button. Doing so may be a time-consuming operation the database is large.

4.1 Customer

1. Log in as an administrator. See [Section 2.1.1 on page 4](#).
2. Press the **Customer** icon from the tool bar or select **View** and press Customers. The **Select Customer** dialog box appears.

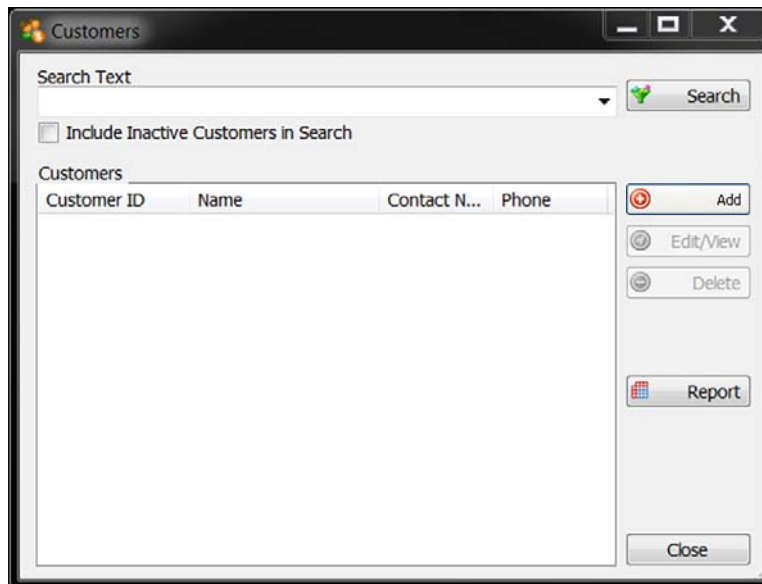


Figure 4-1. Customer Dialog Box

3. Press  Add. The **Edit Customer** dialog box appears.

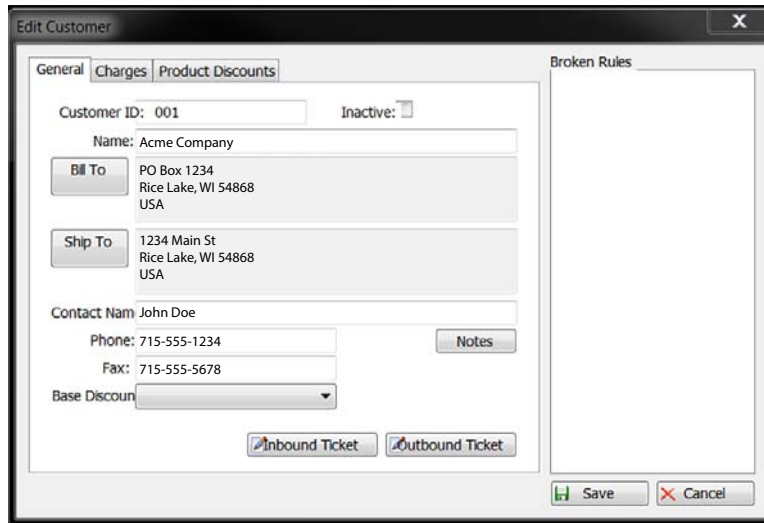


Figure 4-2. Edit Customer Dialog Box.

4. Fill in the text boxes as appropriate for the customer.
5. To create a custom inbound or outbound ticket for this customer, press the Inbound Ticket or Outbound Ticket buttons, respectively. Refer to [Section 3.3 on page 12](#) for information on ticket formatting.
6. To apply a discount, select it from the *Discount* pull-down menu.



Note

The discount must already be entered for it to be in the list. See [Section 4.7 on page 25](#) for adding discounts and [Section 4.8 on page 26](#) for information on modifying the database.

7. To add charges to this customer, select the *Charges* tab.

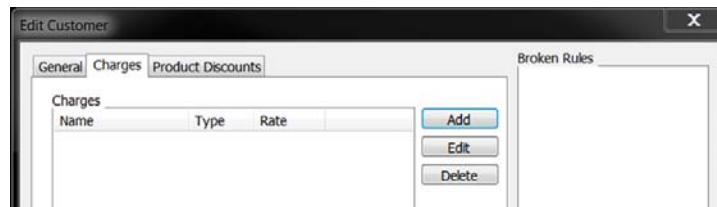


Figure 4-3. Charges Tab

8. Press **Add**. The *Edit Charge* dialog box appears.

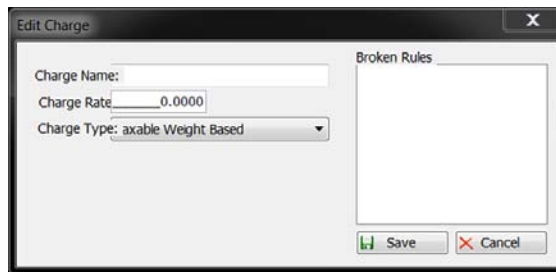


Figure 4-4. Edit Charge dialog box.

9. Complete the dialog box as appropriate and press **Save**. The charge now appears in the *Charges* section.
10. When all information is entered as desired, press **Save**. The customer is added to the database and appears in the *Select Customer* dialog box.
11. To return to *OnTrak*, press **Close**.

4.2 Vendors

1. Log in as an administrator.
2. Press the **Vendor** icon from the tool bar or select **View** and press **Vendors**. The **Vendor** dialog box appears.

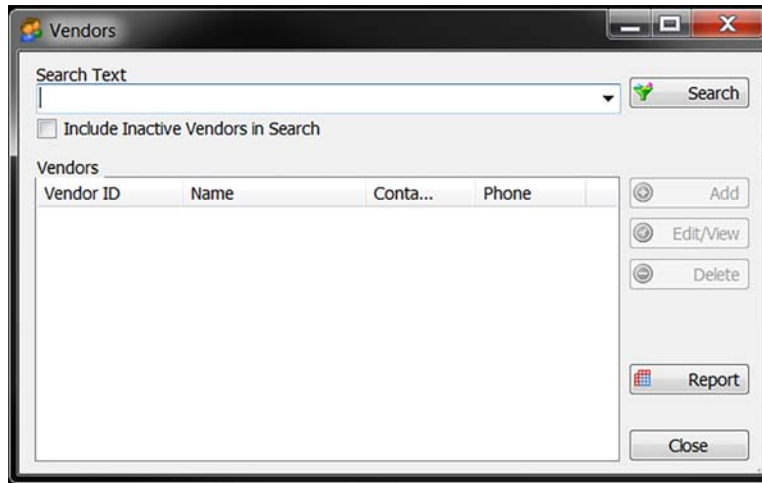



Figure 4-5. Vendors Dialog Box

3. Press  **Add**. The **Edit Vendor** dialog box appears.
4. Fill in the text boxes as appropriate for the customer.

This box allows for a vendor to be added, edited/viewed and deleted. Follow the prompts in each section.

4.3 Product

1. Log in as an administrator.
2. Press the **Products** icon from the tool bar or select **View** and press **Products**. The **Products** dialog box appears.

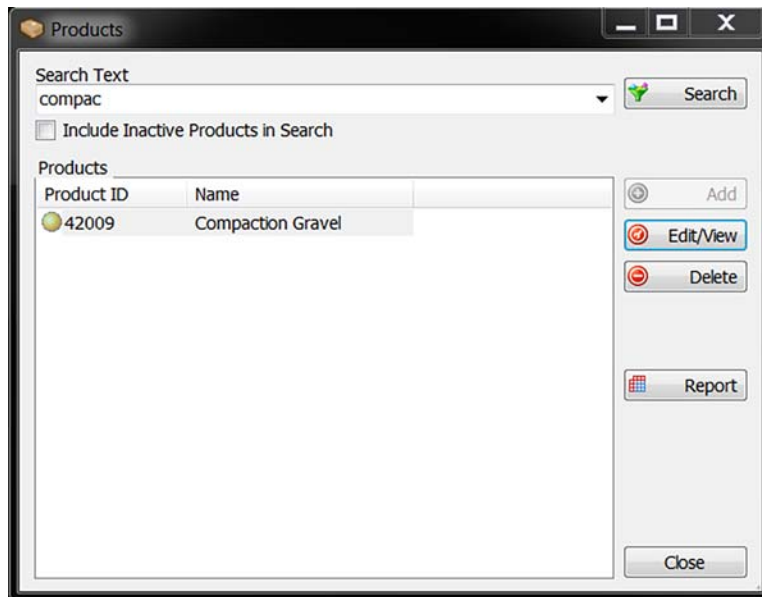


Figure 4-6. Products Dialog Box

3. Press  **Add**. The **Edit Products** dialog box appears.
4. Fill in the text boxes as appropriate for the customer.

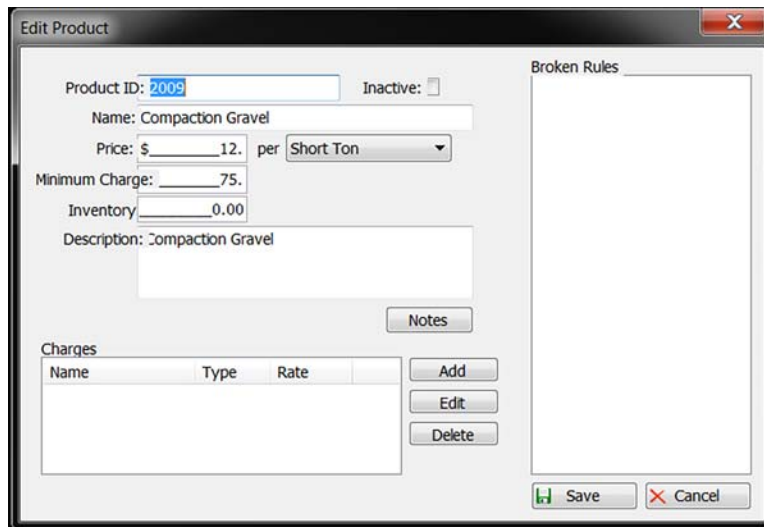



Figure 4-7. Edit Product Dialog Box

5. Enter an ID in the **Product ID** text box
6. Enter the product's name in the **Name** text box.
7. Enter the price in the **Price** text box and select the unit of measure.
8. Enter a minimum charge, if needed, in the **Minimum Charge** text box.
9. Enter the product description in the **Description** text box, if needed.
10. Add any applicable notes to the product by pressing the **Notes** button.
11. If there are any charges to be attached to this product, in the **Charges** section press . The **Edit Charge** dialog box appears.

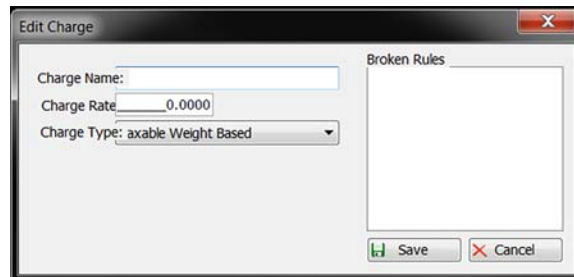





Figure 4-8. Edit Charge Dialog Box

12. Complete the dialog box as appropriate and press . The charge now appears in the **Charges** section.
13. When all information is entered as desired, press . The product is added to the database and appears in the **Select Product** dialog box.
14. To return to *OnTrak*, press .

4.4 Creating a New Hauler

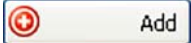
1. Log in as an administrator. See [Section 2.1.1 on page 4](#).
2. Press the **Haulers** icon from the tool bar or select **View** and press **Haulers**. The **Haulers** dialog box displays.
3. Press . The **Edit Hauler** dialog box appears.

Figure 4-9. Edit Hauler dialog box.




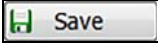


4. Enter the haulers name in the **Name** text box.
5. Press the **Address** button and enter the hauler's address.
6. Enter the hauler's phone and fax numbers into the **Phone** and **Fax** text boxes.
7. If there are any charges to be attached to this hauler, in the **Charges** section press . The **Edit Charge** dialog box appears.

Figure 4-10. Edit Charge dialog box.

8. Complete the dialog box as appropriate and press . The charge now appears in the **Charges** section.
9. If there are any trucks to be attached to this hauler, in the **Trucks** section press . The **Edit Truck** dialog box appears.
10. Complete the dialog box as appropriate. See [Section 4.5](#) for information on the **Edit Truck** dialog box.
11. When the **Edit Truck** dialog box is complete, press . The truck now appears in the **Trucks** dialog box.
12. To return to *OnTrak*, press .

4.5 Creating a New Truck

Trucks can be assigned to a hauler. A new truck can be created during the hauler creation process, or it can create a new truck in its own process, during which pre-existing hauler is assigned.

1. Log in as an administrator. See [Section 2.1.1 on page 4](#).
2. Press the **Trucks** icon from the tool bar or select **View** and press **Trucks**. The **Trucks** dialog box displays.
3. Press . The **Edit Trucks** dialog box appears.

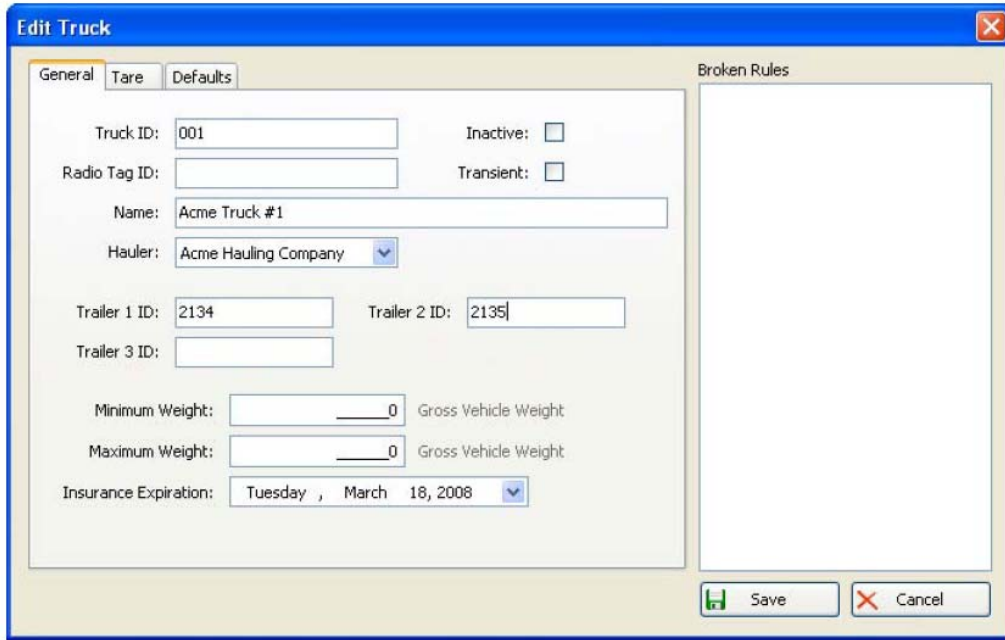


Figure 4-11. Edit Truck dialog box, General tab.

- From the **General** tab, enter the truck ID, truck name, minimum weight, and maximum weight. Use the **Hauler** pull-down menu to select the corresponding hauler, and use the **Insurance Expiration** pull-down menu to select the date of insurance expiration.



Note *The truck's radio tag ID and is currently not used in this version; it is for future purposes. Entering the truck's minimum/maximum weights is optional. If the truck is not currently in use, mark the Inactive check box; if it is a short-term truck, select the Transient check box.*

- Select the **Tare** tab.

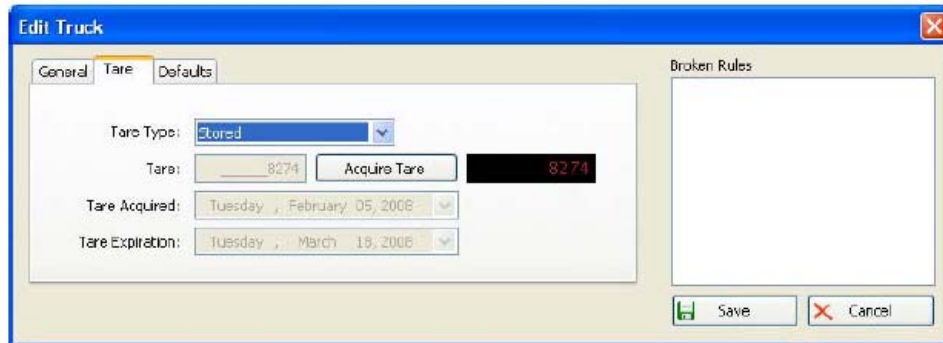


Figure 4-12. Edit Truck Dialog Box, Tare Tab

- From the **Tare Type** pull-down menu, select **Keyed** to type the truck's tare value; select **Weighed** for weigh-in/weigh-out functionality; select **Stored** if the truck is on the scale and the **Acquire Tare** button is to be pressed to acquire the tare now.

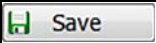
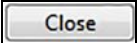


Note *The Tare expiration pull-down menu displays the tare's expiration date. This is calculated based on the application settings. Refer to Section 3.1 on page 7 for information on setting the tare age.*

- Select the **Defaults** tab. Information specified in the **Defaults** tab will automatically appear when the corresponding truck is selected from the main screen. This is helpful if a truck is consistently working for the same customer, carrying the same product, or working on the same job.




Figure 4-13. Edit Truck Dialog Box, Defaults Tab

8. Using the pull-down menus, select a default customer, default product, and/or a default job.
9. When the *Edit Truck* dialog box is complete, press . The truck now appears in the *Trucks* dialog box.
10. To return to *OnTrak*, press .

4.6 Creating a New Job

Jobs provide another level of organization and pricing control within *OnTrak*. If there are multiple haulers all working on the same job, such as a major highway construction; or if one hauler is working on multiple jobs, creating each job in *OnTrak* allows tracking of where products are going and view overall totals. Special pricing and/or charges can also be specified for the job.

1. While logged in as an administrator, from the *View* menu, select *Jobs*. Or press the *Jobs* button from the tool bar. The *Select Job* dialog box appears, and offers the same features as the *Select Customer* dialog box shown in [Figure 4-1 on page 18](#).
2. Press . The *Edit Job* dialog box appears.

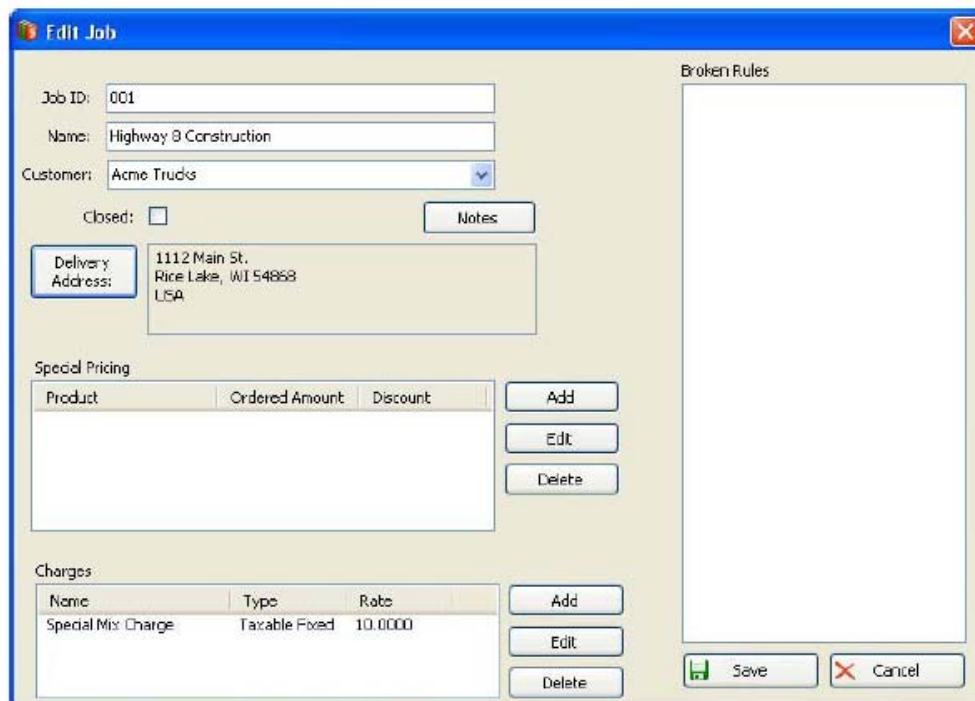


Figure 4-14. Edit Job Dialog Box

3. Complete the dialog box as appropriate.
4. To specify special pricing for the job, in the *Special Pricing* section press . The *Edit Job Pricing* dialog box appears.

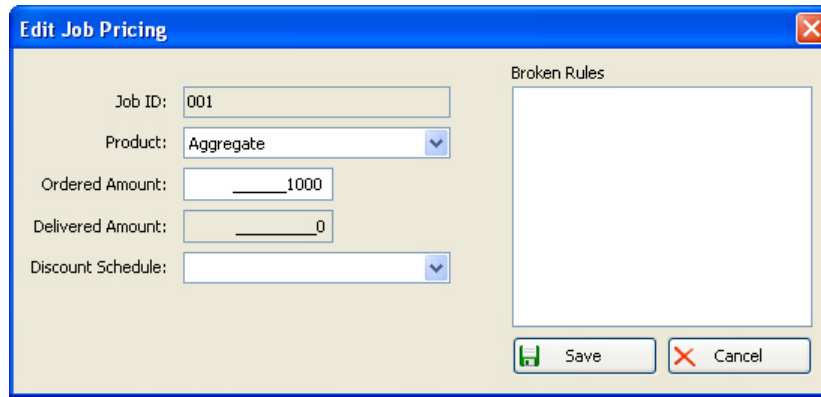
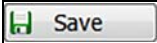



Figure 4-15. Edit Job Pricing Dialog Box

5. Complete the dialog box and press . The pricing now appears in the *Special Pricing* section.
6. If there are any charges to be attached to this job, in the *Charges* section press . The *Edit Charge* dialog box appears.

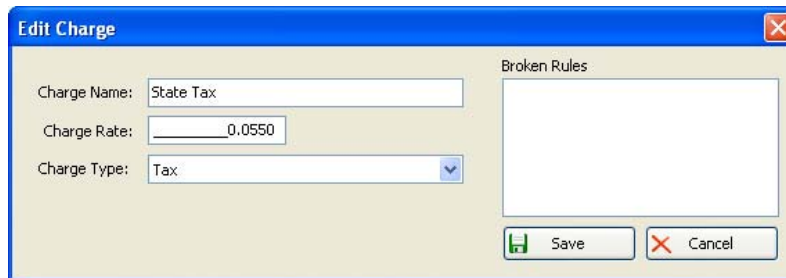

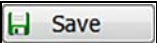

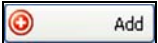


Figure 4-16. Edit Charge dialog box.

7. Complete the dialog box as appropriate and press . The charge now appears in the *Charges* section.
8. Any errors regarding the information entered (i.e., a name with too many characters) will appear in the *Broken Rules* section of the dialog box.
9. When all information is entered as desired, press . The job is added to the database and appears in the *Select Job* dialog box.
10. To return to *OnTrak*, press .

4.7 Creating a New Discount

If running special discounts, or there is an agreement with a certain customer for a discount, it can be easily added to *OnTrak*.

1. While logged in as an administrator, from the *View* menu, select *Discounts*. Or, from the tool bar, press the *Discounts* button. The *Discounts* dialog box appears, and offers the same features as the *Select Customer* dialog box shown in [Figure 4-1 on page 18](#).
2. Press . The *Edit Discount* dialog box appears.

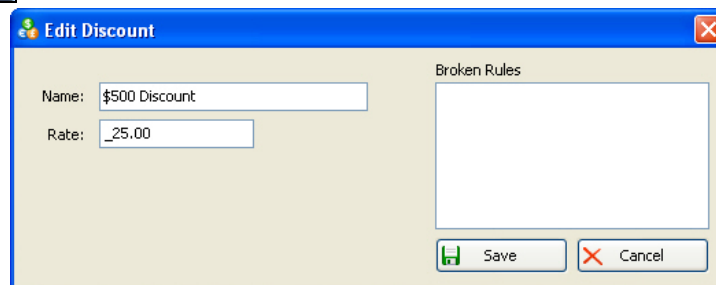




Figure 4-17. Edit Discount dialog box.

3. In the **Name** text box, type a name to identify the discount.
4. In the **Rate** text box, type the rate as a percentage (i.e., 25.00 would equal 25% off the product price).
5. When the **Edit Discount** dialog box is complete, press . The discount now appears in the **Discounts** dialog box.
6. To return to *OnTrak*, press .

4.8 Modifying Database Information

If any information regarding customers, products, haulers, trucks, jobs, or discounts needs to be changed, it is simple to do so.

1. From the **View** menu, select which category contains the information to be modified. A corresponding dialog box appears. Each category follows the same procedure. For this example, we will modify a product, so the **Select Product** dialog box appears.
2. In the **Search Text** text box, type a keyword that will match the desired product. This is helpful if it is a large database. To view all products in the database, leave the **Search Text** text box blank.
3. Press **Search**. Products matching the keyword, or all products, are retrieved and appear in the **Products** section.

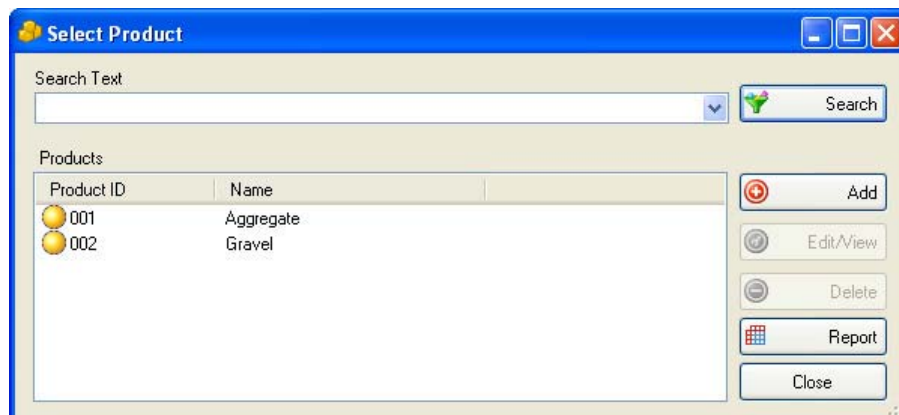
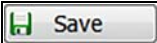
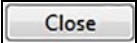
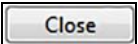


Figure 4-18. Modify Database

4. If more than one product is retrieved, select the desired item from the **Products** list.
5. Press **Edit/View**. The **Edit Product** dialog box appears. This is the same dialog box that appeared when creating the item. Refer to creation instructions for more information on filling out the dialog box.
6. Make any desired changes.
7. When all changes have been made, press . The item is updated.
8. To return to *OnTrak*, press .

4.9 Deleting Database Information

1. From the **View** menu, select which category contains the information to be deleted. A corresponding dialog box appears. Each category follows the same procedure. For this example, a truck will be deleted, so the **Trucks** dialog box appears.
2. In the **Search Text** text box, type a keyword that matches the desired product. This is helpful if it is a large database. To view all items (in this case, trucks) in the database, leave the **Search Text** text box blank.
3. Press **Search**. Items matching the keyword, or all items, are retrieved and appear in the **Trucks** section.
4. If more than one truck is retrieved, select the desired item from the **Trucks** list.
5. Press **Delete**. A confirmation dialog box appears.
6. Press **Yes**.
7. To return to *OnTrak*, press .

5.0 Making Weighments

Weighments in *OnTrak* can be made manually through the program's main screen. Select to enter shipping or receiving mode, as well as the truck, job, customer, and product. Refer to Section 3.1 on page 7 for instructions on shipping and receiving modes.

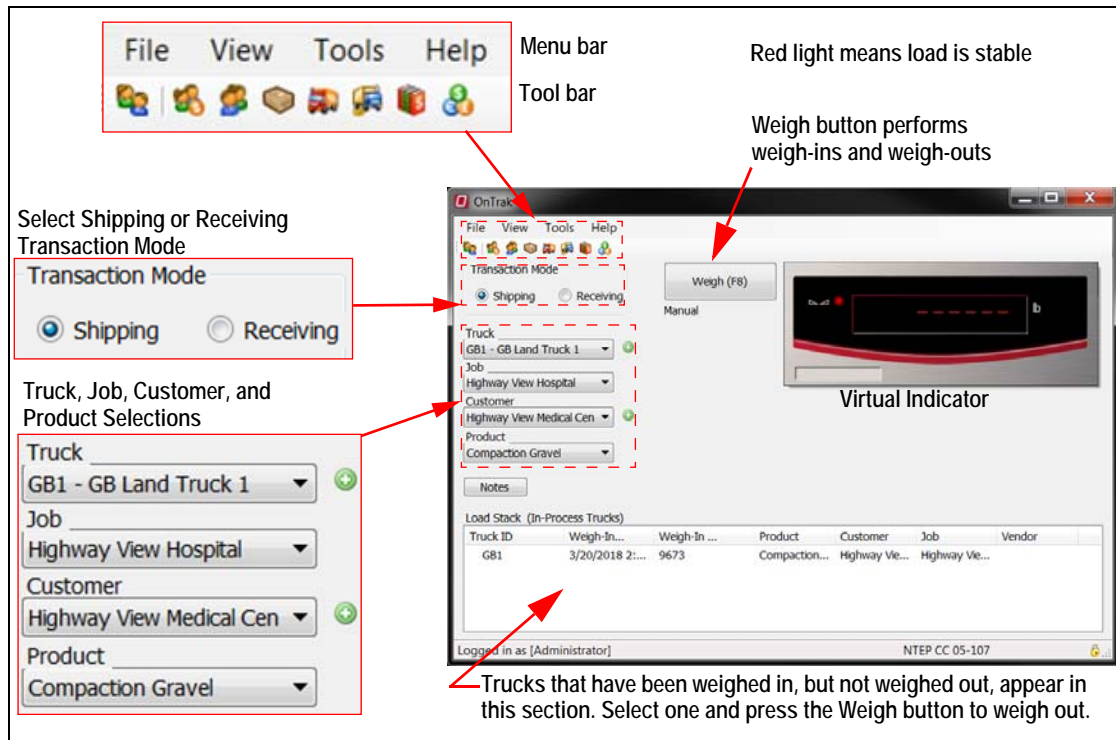


Figure 5-1. OnTrak Truck Scale Data Management Main Screen

5.1 Automated Kiosk Mode

Weighments can automatically be made by enabling automated kiosk mode. First, automated kiosk mode must be configured. See [Section 3.1 on page 7](#), then it can be enabled on scale one, scale two, or both. To enable automated kiosk mode,

1. From the **Tools** menu, select **Options**. The **Options** dialog box appears.
2. Display the **Scale One** or **Scale Two** options by double-clicking the folder.
3. Under **Scale One** or **Scale Two**, press **Kiosk**. Ensure the correct communications method is specified, as well as the printer driver and Windows printer name. Mark the **Enable Automated Kiosk** check box.

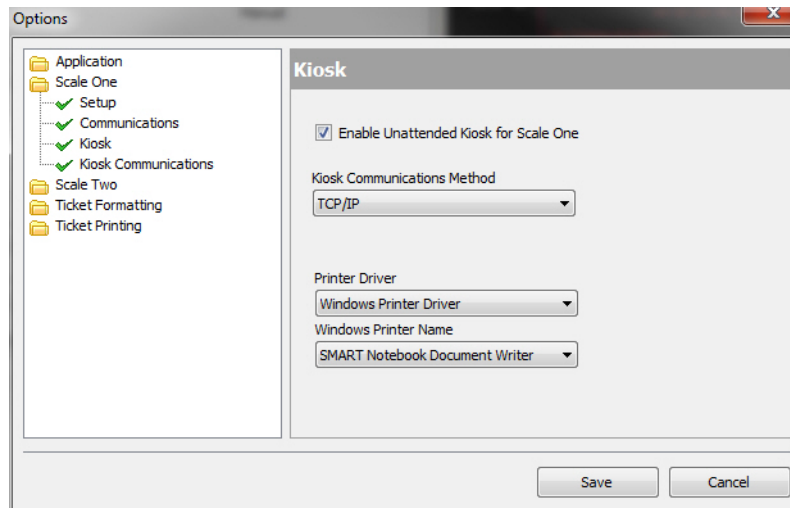


Figure 5-2. Kiosk Configuration Settings

4. Under **Scale One**, select **Kiosk Communications**. The right pane's options will depend on the kiosk communications method selected in Step 3.
5. If TCP/IP was selected for the kiosk communications method in Step 3, specify the IP address and TCP port.

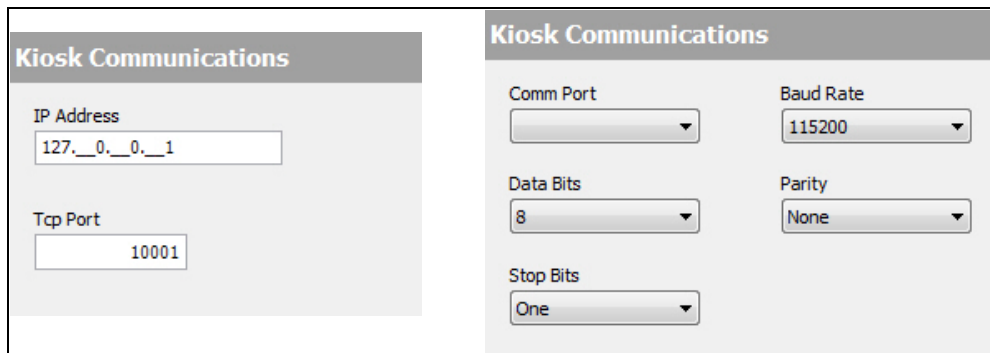
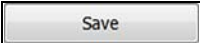


Figure 5-3. Kiosk Communications Settings. TCP/IP (Left) RS-232 (Right)

6. If RS-232 was selected for the kiosk communications method in Step 3, use the drop-down menus to specify the communications port, data bits, stop bits, baud rate, and parity.
7. To begin automated kiosk mode, press .

5.2 Manual Weigh-Ins

Before weigh-in of a truck, the truck must already be entered in the *OnTrak* database. Customer, product and job information may also be entered, but are not required. Refer to Section 4.0 on page 19.

1. From the *OnTrak* main screen, select either shipping mode or receiving mode.



Note

*Shipping mode is used when product is leaving the facility.
Receiving mode is used when product is coming in.*

2. From the **Truck** pull-down menu, select the customer's truck that is being used.
3. If this weighment relates to a specific job, from the **Job** pull-down menu, select the applicable job.
4. From the **Customer** pull-down menu, select the appropriate customer.
5. From the **Product** pull-down menu, select the product being weighed.
6. Have the truck drive onto the scale. The light next to the standstill annunciator on the virtual indicator displays gray when the load is in motion, and it displays red when the load is stable and ready for weighment.
7. Press **Weigh**. The transaction is added to the **Load Stack (In-Process Trucks)** section of the screen.



Note

To add any applicable notes about the weighment, press the Notes button.

5.3 Manual Weigh-Outs

When the truck is ready to be weighed out,

1. If the truck has been weighed in (and a tare has been acquired from the scale), select the truck from the **Load Stack (In-Process Trucks)** section and press **Weigh**. The weighment is complete and the ticket (audit information that has been set up) is printed.
2. If using a keyed or stored tare, the truck will not appear in the **Load Stack (In-Process Trucks)** section. The ticket (audit information that has been set up) will be printed.



Note

If a truck has been weighed in and cannot be weighed out, ensure its tare is set to Weighed. To delete a truck from the load stack, refer to [Section 5.4](#). If indicator communications are lost, refer to [Section 8.3 on page 41](#).

5.4 Managing In-Process Trucks

If a truck has been weighed in, to delete it from the load stack (in-process trucks grid):

1. From the **View** menu, select **Manage In-Process Trucks**. The **In-Process Trucks** dialog box appears, displaying all trucks in the grid.
2. Press the **Delete** button. A confirmation dialog box appears.
3. Press **Yes** to remove the truck from the load stack (in-process trucks grid).

6.0 Automated Weighing

The 920i *OnTrak* Automated Weighing Kiosk is supported by the *OnTrak* truck weighing application. It communicates with *OnTrak* for all required information. The software may be loaded into a single kiosk (outbound) for a single-direction truck scale application, or it may be loaded into two kiosks (inbound/outbound) to support dual-direction automated weighing.

IMPORTANT After a successful download, the 920i needs to be power cycled.

6.1 Operation Sequence

The 920i displays the [] – [] – [] – [] – [Setup Menu] softkeys and welcome message when it powers up or exits the configuration or setup menus.

- When connection between the *OnTrak* Automated Weighing Kiosk and *OnTrak* is broken or lost, the 920i will display **Unable to process truck, See attendant for help.**
- When the connection between the *OnTrak* Automated Weighing Kiosk and the printer is broken or lost, the 920i will display **Error: Printer Communication.**
- If the printer is enabled in the set up menu and goes off line, the 920i will not continue to run normally.

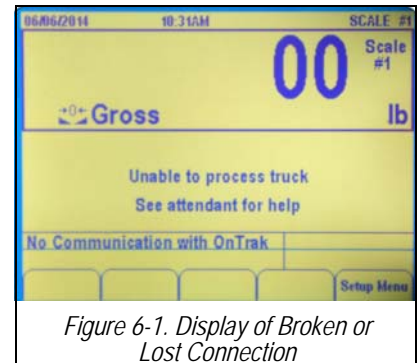


Figure 6-1. Display of Broken or Lost Connection

6.2 Processing a Truck

1. Ensure the scale is empty, zeroed and displaying a GREEN traffic light.
2. Drive onto the scale. The traffic light turns to RED. The 920i display reads **Please enter your Truck ID.**



Note If the traffic light does not turn to RED when a truck is on the scale, adjust the threshold weight within the *OnTrak* software.

3. Enter the truck ID by using the numeric keypad/keyboard, scanning an HID RFID card, or by scanning a SmartPass RF tag.



Note If using the HID or the SmartPass RFID, the tag/card number must be entered in the Radio Tag ID field in the trucks database in the *OnTrak* software. Port 1 must also be configured for the correct device in the setup menu.

Port 1 baud rate settings need to be set appropriately for the attached device in the 920i configuration menu (not the software setup menu).

4. The 920i queries *OnTrak* to search the truck's SQL database for the entered ID.
 - Truck/Radio Tag ID FOUND
Proceed to the next prompt.
 - Truck/Radio Tag ID FOUND without additional prompts

Proceed to complete weighment.

- Truck ID NOT FOUND

The 920i displays **Truck ID was not found, Try again or see attendant for help.**

Enter valid ID or exit the scale.

If the driver does not exit the scale, the prompt will time out and revert back to the **Please enter your Truck ID** prompt. When this occurs, it is normal for the traffic light to turn GREEN momentarily while the prompt is reset.

6.3 Processing a Truck with Loop Detectors

1. Ensure the scale is empty, zeroed, and displaying a **RED** traffic light. Double zeros display on the kiosk and remote displays (*OnTrak* will still show weight). Drive onto the approach, driving over the loop detector. The *OnTrak* Automated Weighing Kiosk will attempt to zero the scale. The system performs one of the following actions:
 - Scale Zeroed – Traffic light turns **GREEN**, program continues to Step 3.
 - Scale not Zeroed – Displays continue to show the **RED** traffic light and double zeros. The truck must back off the approach and continue from the beginning of Step 2.
2. Drive onto the scale. The traffic light turns to **RED**. The 920i displays *Please enter your Truck ID*.



Note

If the traffic light does not turn to RED when a truck is on the scale, adjust the threshold weight within the OnTrack software.

3. Enter the truck ID by using the numeric keypad/keyboard, scanning an HID RFID card, or by scanning a SmartPass RF tag.



Note

If using the HID or the SmartPass RFID the tag/card number must be entered in the Radio Tag ID field in the trucks database in the OnTrak Software. Port 1 must also be configured for the correct device in the setup menu.

Port 1 baud rate settings need to be set appropriately for the attached device in the 920i configuration menu (not the program setup menu).

4. The 920i queries *OnTrak* to search the truck's SQL database for the entered ID.
 - Truck/Radio Tag ID FOUND – Proceed to the next prompt.
 - Truck/Radio Tag ID FOUND without additional prompts – Proceed to complete weighment.
 - Truck ID NOT FOUND – The 920i displays *Truck ID was not found, try again or see attendant for help*.
Enter valid ID or exit the scale.

If the driver does not exit the scale, the prompt will time out and revert back to the *Please enter your Truck ID* prompt. When this occurs, it is normal for the traffic light to turn GREEN momentarily while the prompt is reset.

6.4 Additional Prompts

Prompts vary depending on how the truck is configured in the OnTrack program. The 920i may prompt the user for the following:

6.4.1 Entering a Job ID

1. The 920i prompts driver for job ID.
 - If a vendor is selected in the default tab for the entered truck ID, the 920i displays *Please enter your Job ID or leave blank to skip*.
 - If a vendor is not selected in the default tab, the 920i displays *Please enter your Job ID*.
2. Enter Job ID and press Enter.
 - If the job ID is found and there are additional prompts, proceed to the next prompt.
 - If the job ID is found and there are no additional prompts, proceed to Complete Weighment.
 - If the job ID is not found, the 920i displays *Job ID was not found, try again or see attendant for help*. Enter a valid job ID, seek an attendant for help, or press Enter to skip the prompt and proceed to the next one.

6.4.2 Entering a Product ID

1. The 920i prompts driver for product ID.
 - The 920i displays *Please enter your Product ID*.
2. Enter product ID and press Enter.
 - If product ID is found and there are additional prompts, proceed to the next prompt.
 - If product ID is found and there are no additional prompts, proceed to complete weighment.
 - If product ID is not found the 920i displays *Product ID was not found, try again or see attendant for help*. Enter a valid product ID, seek an attendant for help, or drive off the scale without completing the transaction.

6.4.3 Entering a user Field (1-3)

1. The 920i prompts driver for user field.
 - The 920i displays *Please enter {User Field Name}*.
2. Enter user field ID and press Enter.
 - If there are additional prompts, proceed to the next prompt.
 - If there are no additional prompts, proceed to complete weighment.

6.4.4 Complete Weighment

The system performs the following actions:

- The 920i displays *Processing, Please Wait*.
- If the truck insurance in the *OnTrak* Software is expired, the 920i displays *Truck insurance has expired, See attendant for help*. If the truck insurance has not expired, it will proceed to the next step.
- The 920i captures the stable gross weight and sends it to *OnTrak*.
- The *OnTrak* software will calculate gross, tare and net based on the captured gross weight and the recalled inbound weight. The software will perform value swapping if necessary.
- The software stores the transaction to the *OnTrak* SQL Database.
- The system prints a ticket.
- The 920i displays *Transaction Complete, Take ticket and exit scale*.
When the scale weight drops below threshold, the 920i returns to step 1 on page 31.

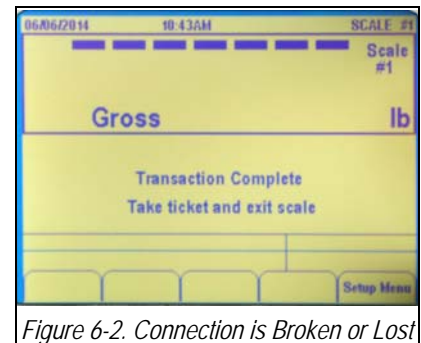


Figure 6-2. Connection is Broken or Lost



Note

The OnTrak Automated Weighing Kiosk will never prompt for customer or vendor. Customers and vendors will be tied to a specific truck for shipping/receiving mode.

The OnTrak Software has a Virtui driver. A Virtui license will be supplied to users with their purchase of an OnTrak license if they are using an iQube2 with the Automated Weighing Kiosk system.

Loop detectors will not be supported if the A/D that OnTrak is getting weight from is NOT located in the Automated Weighing Kiosk because it will not have a way to zero the scale.

6.5 Application Setup & Configuration

The setup menu softkey is password-protected and offers access to the following:

- Display program name & version
- Display a weight widget

Parameter	Default	Softkey	Description
System Time and Date	Current	Time/Date	Time and Date of the 920i
System Password	""	Setup Password	Changing the password that is required for entry in the setup menu; setting the password to nothing will cause the system to not prompt for a password when the setup menu softkey is pressed
<i>OnTrak</i> Timeout	30 Seconds	<i>OnTrak</i> Timeout	Allows user to define how long to wait for customer entry before system resets the prompt back to <i>Enter Truck ID</i>
Printer Enabled/Disabled	Enabled	Printer Enabled/Disabled	Allows the user to enable or disable the monitoring of the printer DTR line; when enabled, the program displays <i>Error: Printer Communication</i> and inhibits truck processing when the printer goes off-line
Setup Serial Port 1	HID Reader	Setup Port 1	Allows operator to change the device connected to serial port 1; operator must manually change the baud rate in the 920i configuration menu to match the baud rate settings of the device connected
Inbound Kiosk/ Outbound Kiosk	Outbound	Inbound/Out	Allows operator to tell <i>OnTrak</i> if the kiosk is the inbound kiosk or the outbound kiosk
Loop Detectors On or Off	Off	Loops On/Off	Allows operator to turn the loop detector functionality on or off <i>Note: If there is no A/D detected in the 920i, this softkey will not be available</i>

Table 6-1. Setup and Configuration Parameters

6.6 Hardware Setup

The hardware setup for the outbound and inbound kiosks.

6.6.1 Outbound Kiosk

Option Card Locations	
Slot	Type
1	Dual Channel Serial Card
2	1Mb Memory Card
3	Currently Not Used (Optional A/D Card)
4	Currently Not Used

Digital I/O			
Slot	Bit	Type	Function
0	1	Output	Red Light Control
0	2	Output	Green Light Control
0	3	Input	Loop Detector 1 (Optional)
0	4	Input	Loop Detector 2 (Optional)
0	5-6	Off	Currently Not used

Serial Port			
Port	Type	Description	Setup
1	PROGIN	RFID Reader	57600,8,E,2
2	KEYBRD	Qwerty Kiosk Keyboard	115200,8,N,2
3	PROGIN	Numeric Keypad/Remote Display	9600,8,N,2
4	CMD	Inbound Kiosk	9600,8,N,2
5	PROGIN	Epson EU-T482 Printer	9600,8,N,2
6	CMD	PC Connection (Kiosk Communication)	9600,8,N,2

6.6.2 Inbound Kiosk

Option Card Locations	
Slot	Type
1	Dual Channel Serial Card
2	1Mb Memory Card
3	Currently Not Used (Optional A/D Card)
4	Currently Not Used

Digital I/O			
Slot	Bit	Type	Function
0	1	Output	Red Light Control
0	2	Output	Green Light Control
0	3-6	Off	Currently Not used

Serial Port			
Port	Type	Description	Setup
1	PROGIN	RFID Reader	57600,8,E,2
2	KEYBRD	Qwerty Kiosk Keyboard	115200,8,N,2
3	CMD	Numeric Keypad/Remote Display	9600,8,N,2
4	CMD	Currently Not Used	9600,8,N,2
5	PROGIN	Epson EU-T482 Printer	9600,8,N,2
6	CMD	Outbound Kiosk	9600,8,N,2



7.0 Reports

OnTrak can generate several reports based on which information to be viewed. To access reports, log in as a user with administrator permissions.

The reports include:

- Customer Report
- Hauler Report
- Product Report
- Truck Report
- Job Report
- Discounts Report
- Shipping Transactions
- Receiving Transactions
- Shipping Usage Reports (by product, customer, truck, hauler, or job)
- Receiving Usage Reports (by product, customer, truck, hauler, or job)

These reports can be viewed, printed or exported. Within the report, export options include Microsoft Excel format (.xls), or Acrobat (.pdf) format. Access to the **Export Transactions** wizard (Tools » Export Transactions...) to export transactions (based on selected criteria) to an .XML file is accessible.

7.1 Viewing and Printing a Report

1. Log in as an administrator. See [Section 2.1.1 on page 4](#).
2. Expand **View** and select **Reports**. The process is the same for all reports except transaction reports. The report dialog box displays, customer is being used for examples.

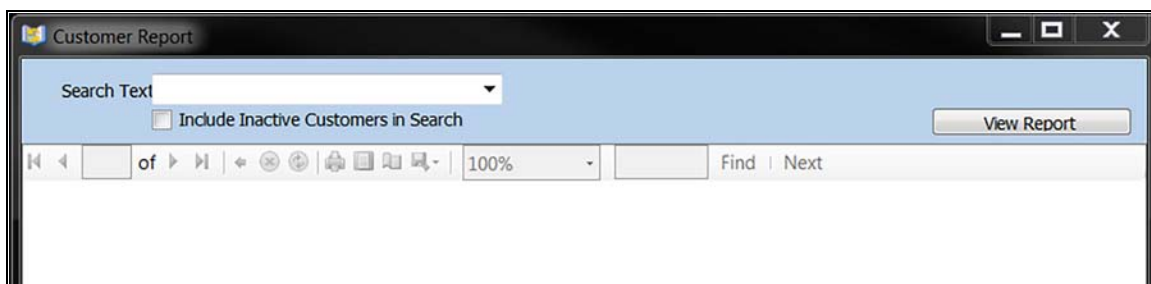


Figure 7-1. Example Dialog Box – Customer Report

3. In the **Search Text** text box, type a keyword to identify the customer. This text box can be left empty, but this will create a report of all customers and may be a lengthy process depending on the size of the database.

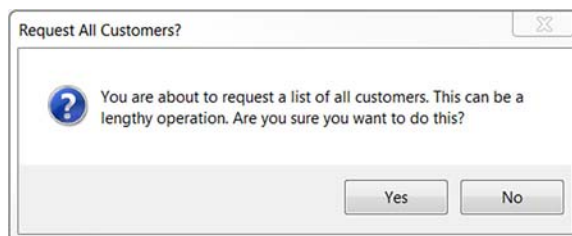


Figure 7-2. Report Length Awareness



Note Recent keyword searches will appear in the Search Text pull-down menu.



- Press . The *Customer Report* dialog box generates the customer report.

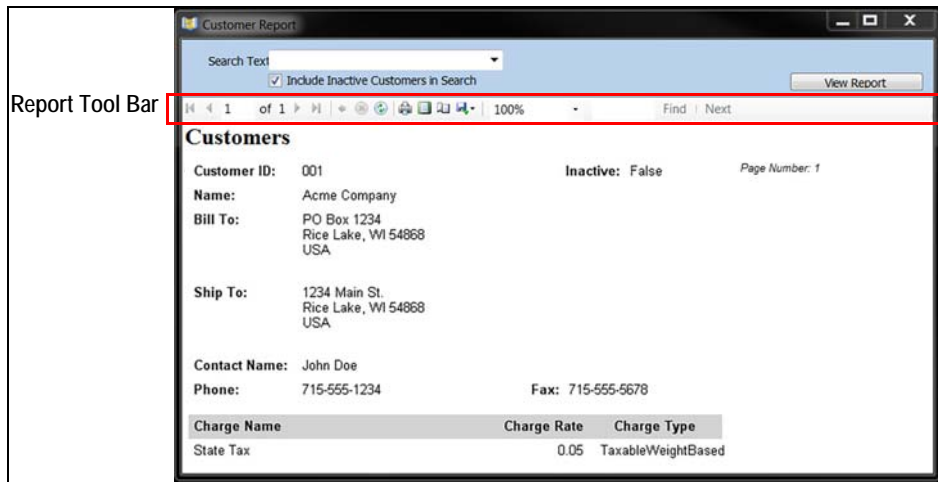


Figure 7-3. Customer Report

- To print the report, press  on the tool bar. The printer selection box displays.
- Select a printer and press .

7.2 Viewing/Printing a Transaction Report

Transaction reports are added to the database frequently, so when searching for them use keywords and dates to locate and view/print specific transactions.

- Log in as an administrator. See [Section 2.1.1 on page 4](#).
- Expand *View* and select *Reports*. The process is the same for shipping and receiving reports. The transaction dialog box displays, Shipping Transactions are being used for examples.

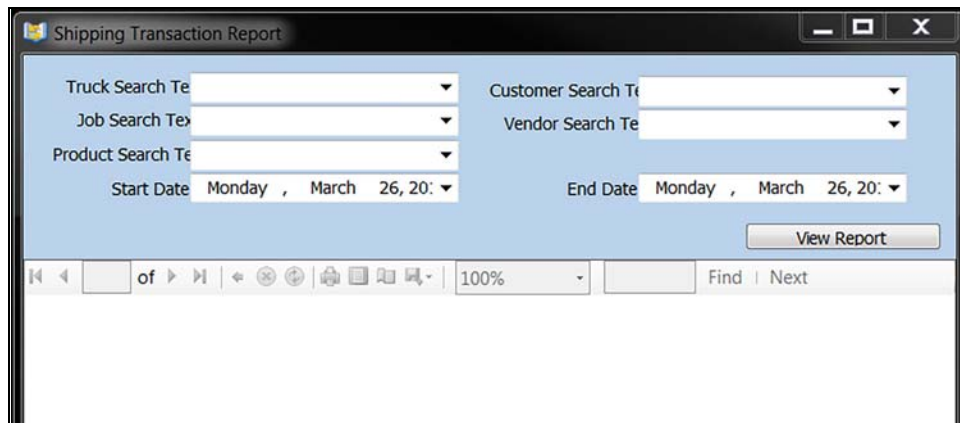


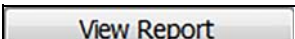
Figure 7-4. Shipping Transactions Report

- Enter information into the text boxes or enter keywords to identify the transaction. A date range can also be specified, leaving the other text boxes blank, use the pull-down menus for *Start Date* and *End Date* to set dates.


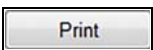


The Start Date and End Date range is always in effect. The other text boxes are optional criteria that can be used to further refine the search. All transactions occurring within a selected date range will appear if no keywords are entered in the Search text boxes.

Shipping or Receiving transactions occurring within a selected date range will appear if no keywords are entered in the Search text boxes.

- Press . The transaction report is generated and displayed.



5. To print the transaction report, press  on the tool bar. The printer selection box displays.
6. Select a printer and press .

7.3 Exporting a Report

After a report is generated, it can be exported to one of the following file types:

- Microsoft Excel (.xls)
- Microsoft Word (.doc)
- Acrobat (.pdf)
- Extensible Markup Language (XML)
- Comma Separated Value (CSV)

7.3.1 Microsoft and Acrobat Files

Use these steps to save as one of the Microsoft (xls or doc) files types or the Acrobat (pdf) file type.

1. Generate a report (see [Section 7.1](#)).
2. Press the save icon on the report tool bar. The files types are displayed.

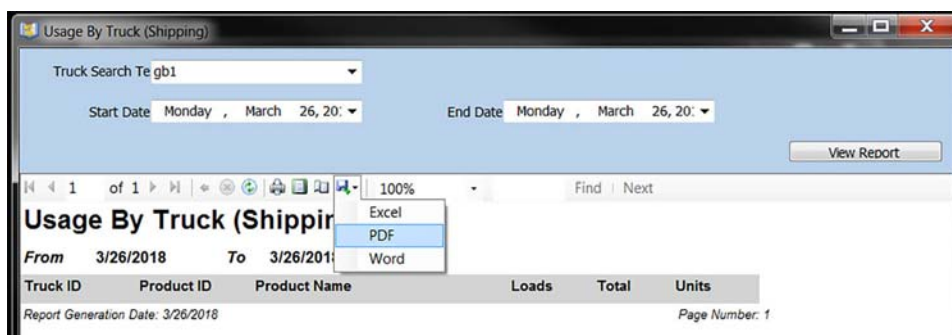



Figure 7-5. Export Drop-Down Menu

3. Select the desired file type.
4. Navigate to the desired save location and enter a file name.
5. Press . The file saves in the selected location

7.3.2 Export an Extensible Markup Language (XML) Transaction

OnTrak has the ability to export transactions (based on criteria specified) to an XML file.

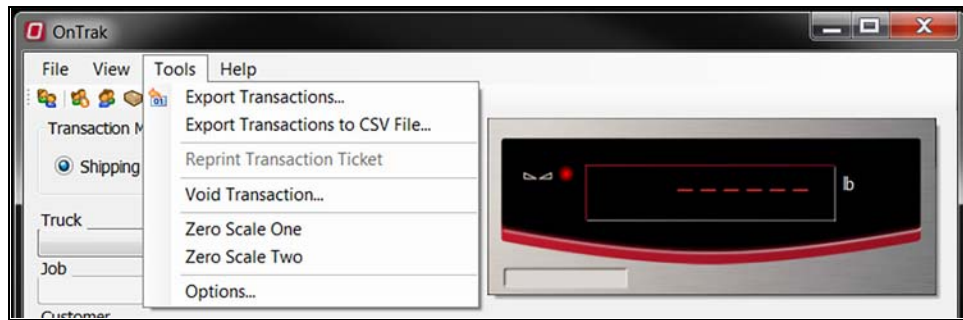


Figure 7-6. Export Transactions Wizard

1. Expand the *Tools* menu and select *Export Transactions*. The *Export Transactions* wizard displays.

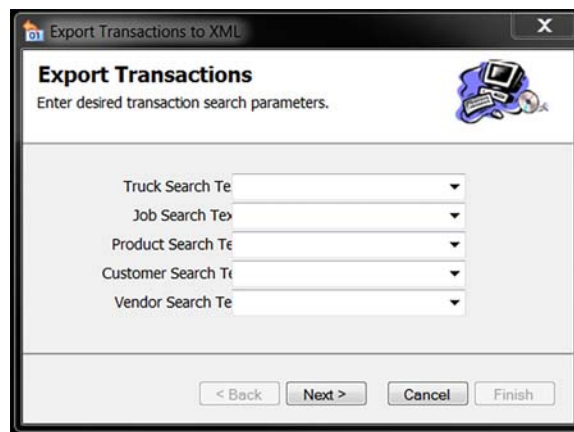


Figure 7-7. Export XML Transactions

2. Use the pull-down menus to select desired criteria for each item. Leave a field blank to include all of its database entries.
3. Press . The date range dialog box displays.

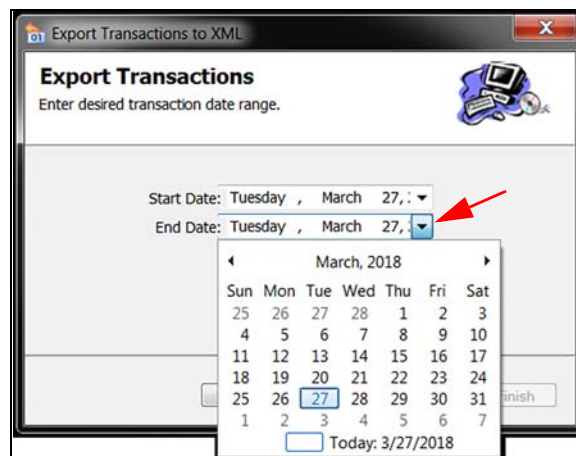


Figure 7-8. Date Range Dialog Box

4. Enter the *Start Date* and *End Date* by pressing the arrow at the end of the date fields.
5. Press .

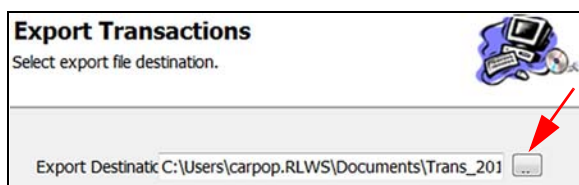


Figure 7-9. Export Destination

6. Press . A file save box displays.
7. Enter a file name for the export and press . The data is exported to an .XML file at the location specified.

7.3.3 Export a Comma Separated Value (CSV) Transaction

OnTrak has the ability to export transactions (based on criteria specified) to an CSV file.

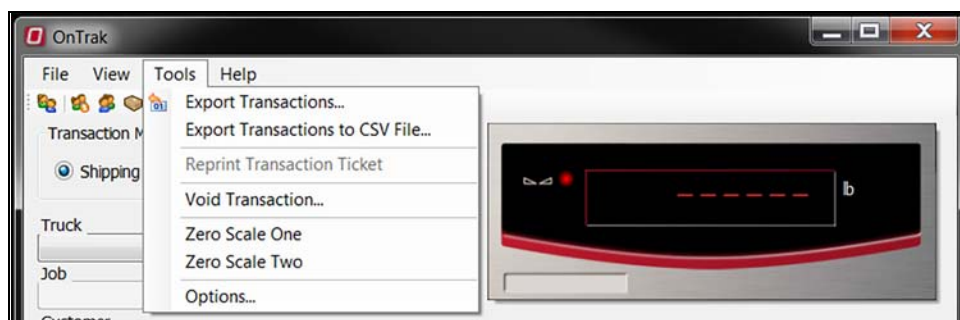


Figure 7-10. Export Transactions Wizard

1. Expand the **Tools** menu and select **Export Transactions to CSV File**. The **Export Transactions** wizard displays.

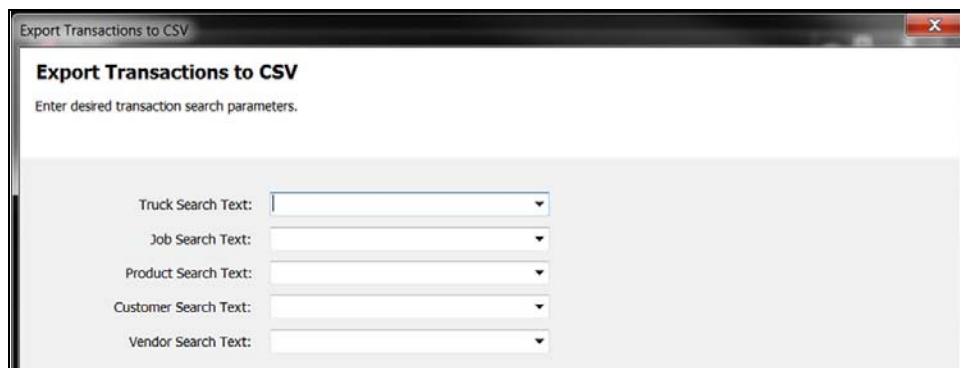


Figure 7-11. Export XML Transactions

2. Use the pull-down menus to select desired criteria for each item. Leave a field blank to include all of its database entries.
3. Press . The date range dialog box displays.

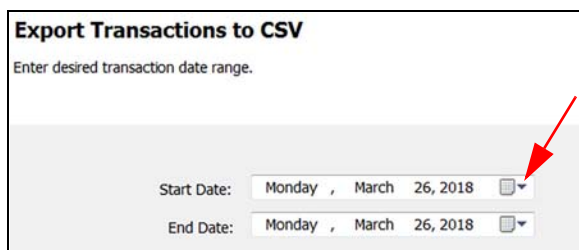


Figure 7-12. Date Range Dialog Box

4. Enter the **Start Date** and **End Date** by pressing the arrow at the end of the date fields.
5. Press . The template dialog box displays.

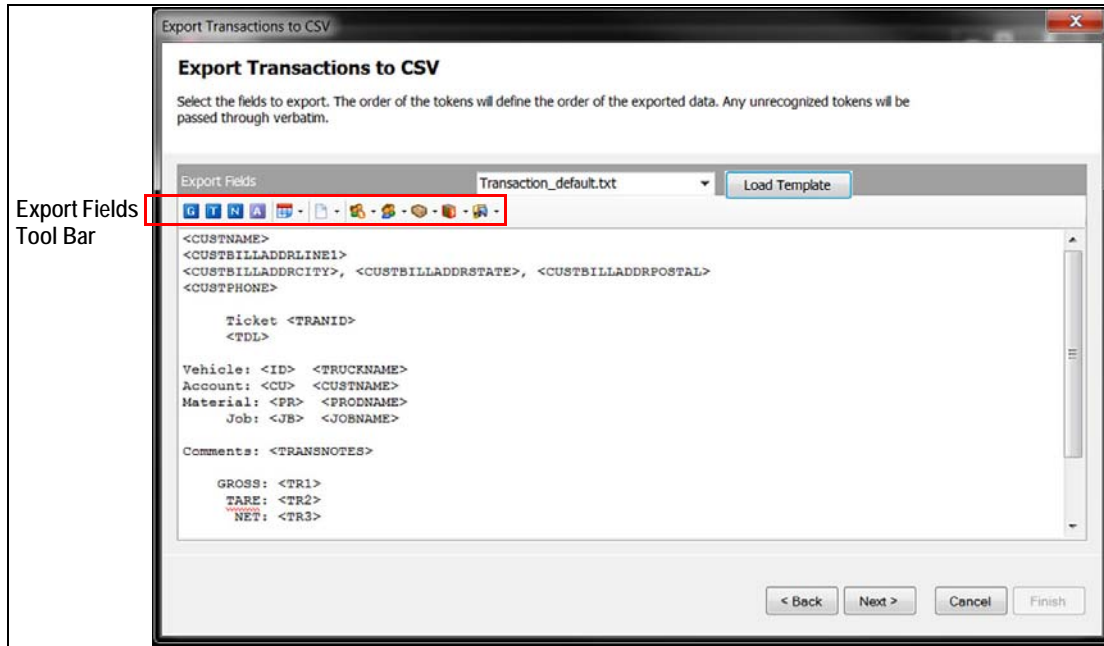


Figure 7-13. Template Dialog Box

6. Select the fields to transport using the export fields tool bar or load a saved template by selecting it from the pull down menu and pressing . The export destination box displays.

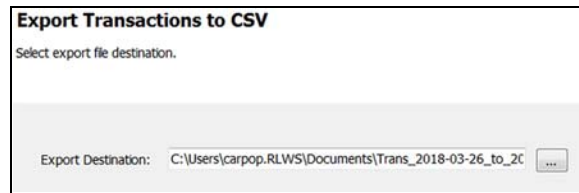


Figure 7-14. Export Destination

7. Press . A file save box displays.
8. Enter a file name for the export and press . The data is exported to an CSV file at the location specified.

8.0 Maintenance

OnTrak uses the Database Backup Restore Utility to backup and restore databases. It is recommended to make regular backups of the database.

8.1 Backing up a Database

1. Open the Database Backup Restore Utility (Start » Programs » Rice Lake Weighing Systems » OnTrak » Database Backup Restore Utility).

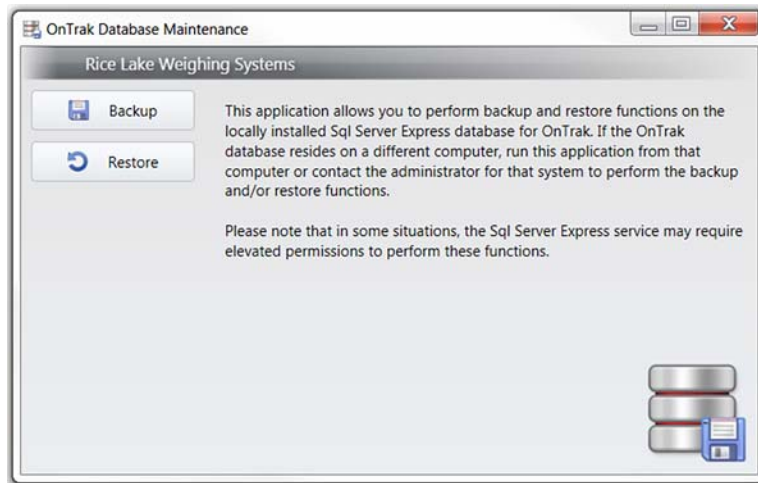


Figure 8-1. OnTrak Database Maintenance

2. Press .

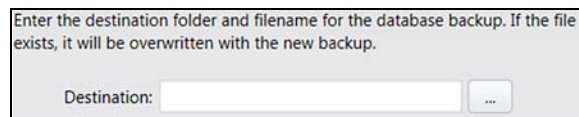


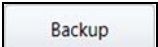


Figure 8-2.

3. Press  and navigate to the desired save directory.
4. Enter a name for the file and press .
5. Press . *Performing Backup* displays momentarily, then [Figure 8-3](#).

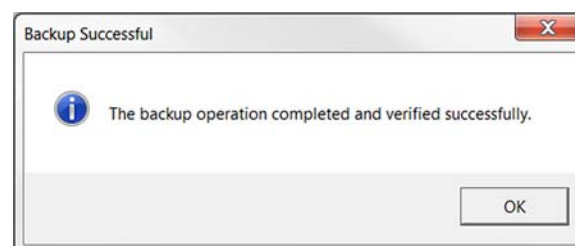




Figure 8-3. Backup Success

8.2 Restoring a Database

Before restoring a database, ensure that *OnTrak* is closed.

1. Open the Database Backup Restore Utility (Start » Programs » Rice Lake Weighing Systems » OnTrak » Database Backup Restore Utility).
2. Press .
3. Press  and navigate to the backup files.
4. Select a file and click **Open**.

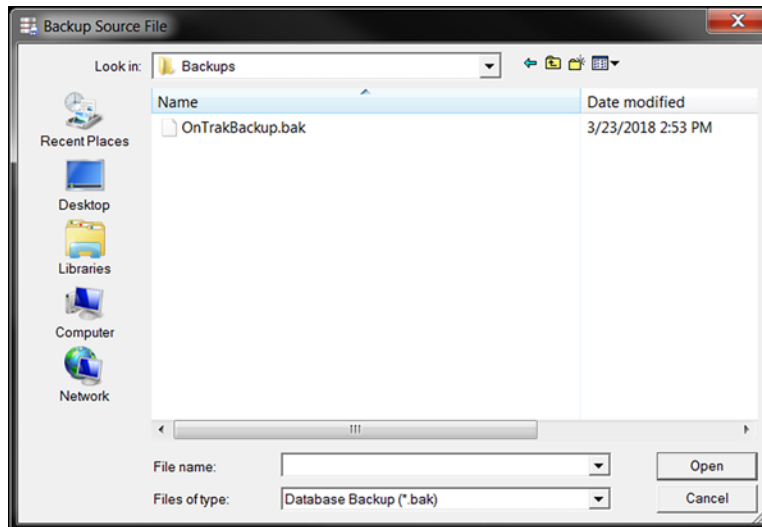


Figure 8-4. Restore File

5. Press . *Performing Restore* displays momentarily, then a confirmation dialog box displays.

8.3 Resetting Indicator Communications

If communications with the indicator are lost and all cables are connected properly, it can easily be reset.

1. From the *Help* menu, select *Reset Indicator Communications*. The communications are reset.
2. If communications are still not functional, contact Rice Lake Weighing Systems support.



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