Proxis Keychain Synch User's Guide

Version 2.1

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Keychain Synch Version 2.0
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Proxis Keychain Synch User's Guide

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1   Introduction

This user's guide is designed as a learning tool and technical reference for use with the Proxis Keychain Synch software. If at any time you require technical support or specific label designs please contact your Proxis Software reseller or our help desk: support@proxissoftware.com.

1.1   What is Keychain Synch?

Keychain Synch is a standard Windows desktop application for collecting and managing barcode scanning data from keychain barcode scanners such as the Opticon OPN2001 and the Symbol CS1504.
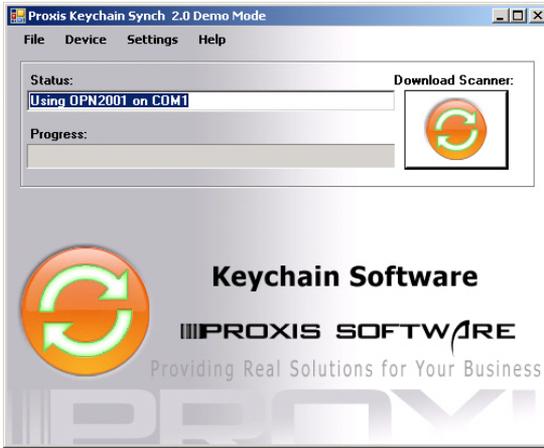
Figure a. Keychain Synch Main Screen

Keychain Synch is a simple but powerful data retrieval tool that supports additional data management functions such as Email and FTP transfer of synched comma separated value files.

Keychain Synch takes scanned barcodes, downloads them from a barcode scanning device and saves them to a Comma Separated Value (CSV) text file as well as in an Access Database.

1.2   Keychain Synch Features and Benefits

Proxis Keychain Synch is a simple and inexpensive way to address a number of different data collection scenarios.

Proxis Keychain Synch provides the following benefits:
- Inexpensive data collection: keychain scanners offer a budget alternative
- Flexible data management through CSV or Access databases
- Email and FTP synchronization for offsite integration
- Custom Programming to fit your specific requirements (Custom Programming is provided on a time and materials basis)

Features include:
- Supports CS1504 and OPN2001 scanners
- Auto Synch – recognizes a device with data and downloads it automatically
- Combine Quantities – takes each scan and adds them up.
- Date Time stamp
- Device ID Data Directory – use multiple devices with their own data directories
- Overwrite data or keep a running list
- Email data file after synch with support for secure SSL email connection.
- Access Database for easy data manipulation and access through ODBC or linked tables etc
- FTP synch the CSV file

1.3   Installation

Installing Keychain Synch is accomplished by clicking the SetupKeychainSynch.exe icon and following the installation steps. The application is installed to the c:\Program Files\Proxis Software\Keychain Synch folder by default.

After installation, the Keychain Synch application should be registered to unlock the demo mode. Demo mode is restricted and enters the word DEMO into the barcode data.

The Keychain Synch installer will create a shortcut to the program on the desktop and in the Windows Start Menu.
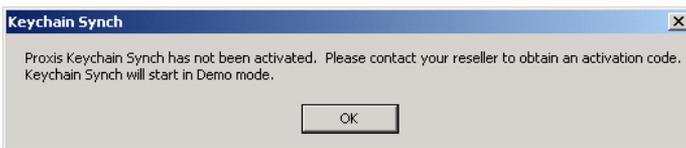
Figure a. Splash Screen

Attention: It is best to install Keychain Synch before connecting a barcode scanner.

The Keychain Synch installer will place both supported scanners' drivers on your system allowing easy installation of the drivers for your scanner.

1.3.1   Registration and Activation
To register and activate the full version of Keychain Synch:

1. Copy down the Registration Number found in the Product Registration screen.
2. Purchase a software license from a Proxis reseller.
3. The Proxis reseller will issue an activation code based on the registration number.
4. Enter the Activation Code in the field provided.
5. Click on Activate Demo to complete the Activation process.

Enter Activation code from a Proxis Reseller to enable all features
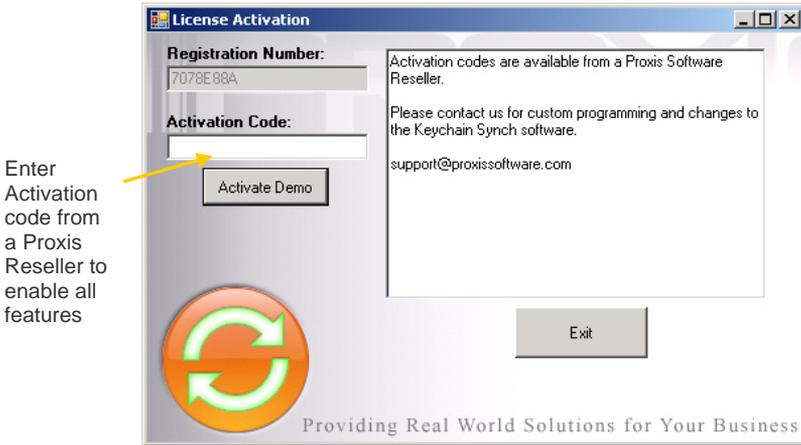
Figure a. Product Registration Screen

If the software is moved to another computer a new activation code will need to be requested from a Proxis Software reseller.

1.4   Hardware Setup

Keychain Synch works with two different hardware combinations:
OPN2001 and the CS1504. Most commonly, Keychain Synch is loaded
on a computer with an OPN2001 barcode scanner. This scanner has
more memory, longer scanning range and a better battery than the
CS1504.

1.4.1   Opticon OPN2001 barcode scanner setup
1. Plug the USB Cable into an available USB port.
2. Windows will automatically install a driver.
3. The system will automatically assign a virtual COM port for the
   device.

1.4.2   Symbol CS1504 barcode scanner setup
1. Plug the USB Cable into an available USB port.
2. Windows will automatically install a driver.
3. The system will automatically assign a virtual COM port for the
   device.
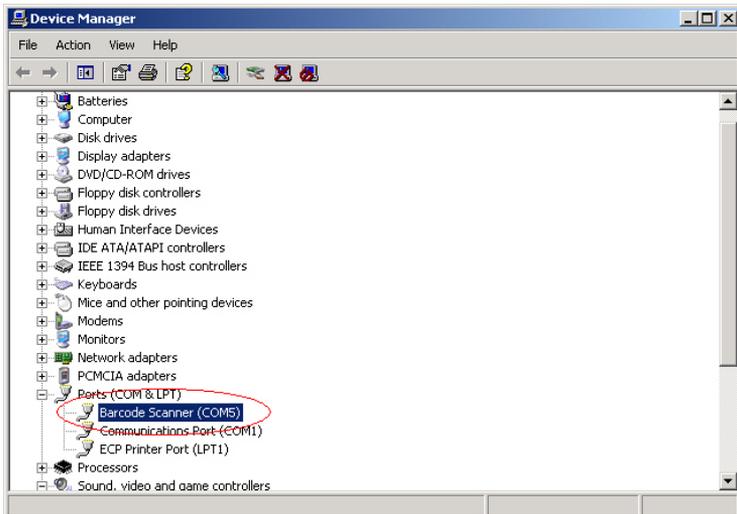
Figure a. USB Driver with associated COM port (COM5)

For assistance contact your reseller or the Proxis Software Help Desk:
support@proxissoftware.com.

1.5   Getting Started

Double click the desktop icon.

Figure a. Keychain Synch Desktop Icon

After registering the Keychain Synch software you'll want to customize your settings and assign a Com Port to your device.

1.6   Settings and Preferences

The Settings and Preferences screen provides the ability to modify application settings and preferences.

The Settings form is broken down into three groups with the following settings:

Scanner Settings:
- Set the com port
- Auto Synchronize Scanner
- Combine Quantities
- Import/Use the Date/Time stamp
- Use the unique device identification number as a Data Folder
- Overwrite/Replace the existing data file when synchronizing
- Process a .bat file (process.bat located in the Data Folder)

FTP Settings:
- Use the FTP function to update a scanned data file after downloading from the barcode scanner
- Set the FTP server name
- Set the FTP Username
- Set the FTP Password (Warning: saved in plain text)
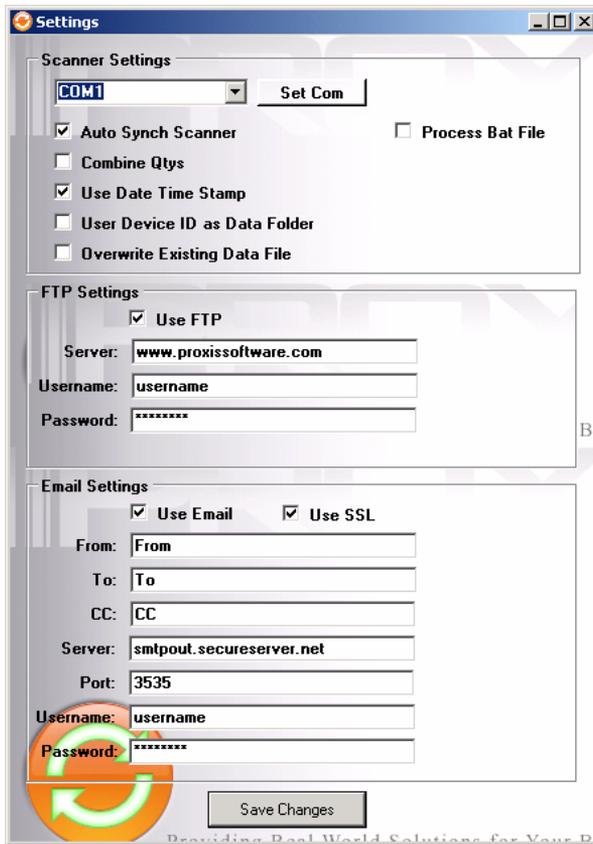
Figure b. Settings Zoom

Email Settings:
- Select whether to use the email feature to automatically email a copy of the data that's been downloaded from the barcode scanner
- Enter the address from which the email is being sent (this must often be the same as the SMTP account from which the email is being sent
- Enter the address to which the email is to be sent
- Enter a CC address to send a recipient a copy of the email
- Enter a SMTP server address
- Enter the SMTP server port to be used
- Enter a server username
- Enter a server password (Warning: saved in plain text)

2 Working with Keychain Synch

Keychain Synch has a Main Download Screen and a Settings Screen. The main screen controls the synchronization with the device while the Settings screen manages the download settings.

2.1 Main Download Screen

This screen is responsible for downloading data from the scanner and showing the progress and status of the download, FTP and Email operations.
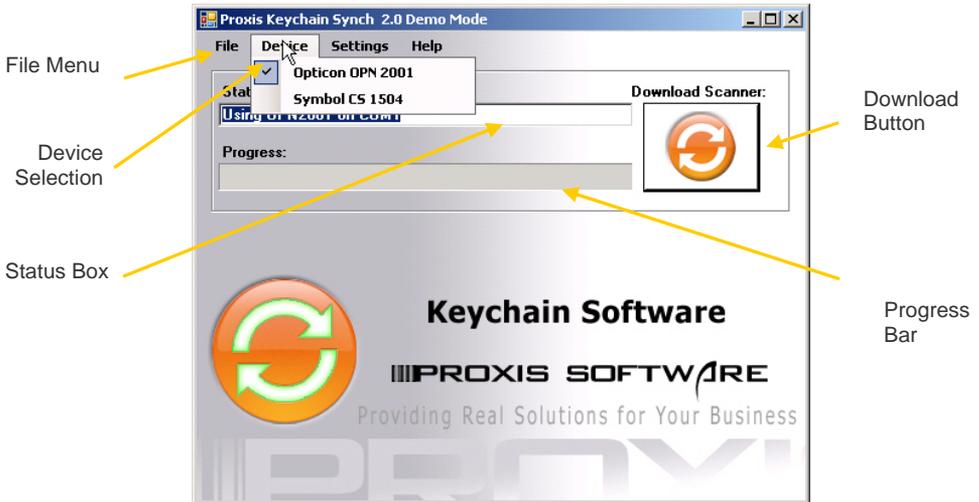
Figure a. Main Inventory Screen

File Menu
The file menu contains the following functions:
- Open the Data Folder (Default is c:\Documents and Settings\User Name\ Application Data\Proxis Software\Keychain Synch\data.txt)
- Choose the Data Folder
- Activate the License
- Exit
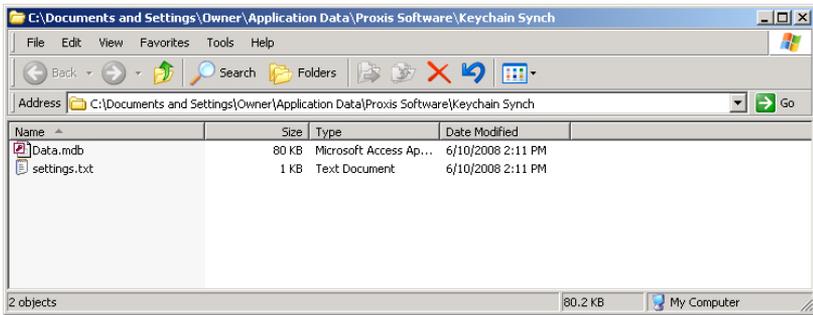
Figure b. The Default Data Folder

Device Menu
The device menu provides the choice of using either the OPN 2001 (default) or the CS 1504 barcode scanners.

Settings Menu
This will open the settings form.

Help Menu
- View the User Manual
- View the Error Log
- View the About screen that contains contact information and version number

Figure b. The About Screen

2.2   Synchronize Scanner

To download barcodes:

1. Plug the scanner into the computer.
2. Ensure that the proper Com Port is selected.
3. If the Auto Synch Scanner setting is enabled the barcode scanner will beep and download its contents.
4. If not enabled, click on the Download Scanner button.

2.3   FTP the CSV File

1. Ensure that the Use FTP setting is checked on the settings form.
2. Enter the FTP server address on the settings form.
3. Enter the FTP user name on the settings form.
4. Enter the FTP password on the settings form. (Warning: this password is stored in plain text).
5. Click on the Save Changes button.
6. Synchronize the scanner.

2.4   Email the CSV File

When selected in settings Keychain Synch will automatically email a copy of the barcode data file.
To Email the CSV File:

1. Ensure that the Use Email is checked.
2. Check Use SSL if SSL encryption is required you the server.
3. Enter the From Address.
4. Enter the To Address.
5. Enter the Copy Address (optional).
6. Enter the SMTP Server.
7. Enter the SMTP Server Port (usually 25).
8. Enter the Username.
9. Enter the Password (Warning: password is stored in plain text).
10. Click on the Save Changes Button.
11. Synchronize the scanner.

Select the
COM Port

Scanner
will synch
when
connected

Creates a
Date/Time
field

Overwrite
data files

Use FTP to
upload
data to
FTP server

Send a
copy of
Data file
via email

SMTP
outbound
server

Set the
COM Port

Run Auto
Process
file after
synch

Combine
scans to
create a
qty field

Create a
separate
data folder
for each
device

Use SSL

SMTP
server port
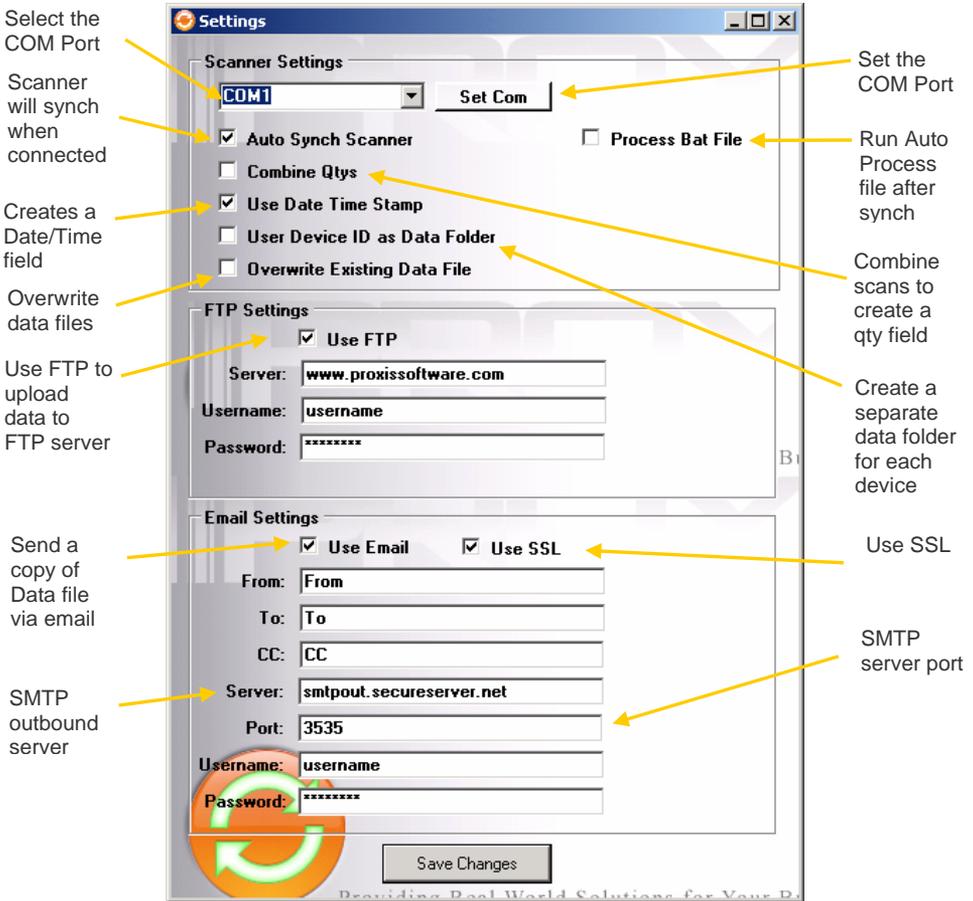
Figure b. Settings Zoom

2.5   Processing a .Bat File

Keychain Synch provides the ability to run a custom command or application automatically after synching with the device.

The command is executed through the processing of the Process.bat file. When the "Process Bat File" setting is checked on the Settings screen, Keychain Synch will automatically create the Process.bat file in the current Data Folder.

Batch files allow users to create a list of commands to run in sequence once the batch file has been executed. For example, a batch file could be used to run a command to move the downloaded CSV file to an

alternate directory or fire a Macro to import the data into a database. A simple batch file does not require any special programming skills and can be done by users who have a basic understanding of MS-DOS commands.

To add a batch command to the Process.bat file:
1. Open the Data Folder using the File Menu.
2. Right click on the Process.bat file and select Edit.
3. Enter the command into the text file.
4. Save and close the text file.

Example Batch Command:

```
start notepad myfile.txt
```

This command, when entered into the Process.bat file, will open the notepad and display the contents of myfile.txt when a scanner is synchronized.