



## **Handheld Installation Instructions**

Version 2.x

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## Requirements

- **ActiveSync (for Windows XP):**
  - ActiveSync 4.5 or greater must be installed on the machine from which the installer is run.
    - A standard or guest partnership must be set up between the handheld and the install machine. Refer to the ActiveSync documentation for further details.
  - ActiveSync 4.5 must be installed at each health facility on the machine that the handheld will connect to.
    - A standard partnership should be set up between the handheld and the machine the handheld connects to at each health facility. Refer to the ActiveSync documentation on how to set up a standard partnership.
- **Window Mobile & Pocket PC Operating Systems:** The handheld must be running version Windows Mobile 5 or Windows Mobile 6.x operating system.
- **Compact Framework:** Version 3.5 of the Compact Framework must be installed on the handheld. The installer may be downloaded directly from Microsoft at: <http://www.microsoft.com/downloads/details.aspx?familyid=E3821449-3C6B-42F1-9FD9-0041345B3385&displaylang=en>
- **OpenNETCF SDF Library:** StockTaker Version 2.0 and greater requires that version 2.3 of the OpenNETCF Smart Device Framework library be installed on the handheld. The MSI will install this automatically. Refer to the **Alternate Install Methods** section of this document if you are not using the MSI to install StockTaker.
- **OEM Drivers – Motorola, Honeywell and Intermec**  
The handheld model may require specific scanner drivers available from the manufacturer. Contact StockTaker to inquiry about specific devices.
- **Handheld Date and Time:** Before running the installer, make sure the date and time are set correctly on the handheld. The stock take files created by the StockTaker application will contain the incorrect dates if the date and time on the handheld are incorrect.

## ***Motorola Symbol Devices***

- **Symbol Class Libraries:**

The Symbol .NET 2.0 class libraries must be installed on Symbol devices before running StockTaker. A .cab file containing the class libraries can be found on the install CD along with instructions on how to install the libraries. The class libraries can also be found in the Symbol Mobility Developer Kit for .NET, which is available for download from the StockTaker Support site:

<http://www.stocktaker.ca/support.php>

- **Ethernet Cradles and Ethernet Drivers (Available Mid-2009):**

**MC55:** Symbol MC55 devices require an Ethernet cradle driver to access the network via an Ethernet cradle. An Ethernet cradle driver for the MC55 can be found on the install CD along with instructions on how to install it. The Ethernet cradle driver can also be downloaded from the Symbol web site.

NOTE: You will need a Symbol user account to access this part of the Symbol web site.

## ***Dolphin 7900***

- **Dolphin Class Libraries:**

The Dolphin class libraries must be installed on Dolphin 7900 devices before running StockTaker. A .cab file (netcf.hhp.wce4.armv4\_x.xx.cab) containing the class libraries can be found on the install CD along with instructions on how to install the libraries.

## ***Intermec CN3 and CN4***

- **Intermec Class Libraries:**

The Intermec class libraries are included with the StockTaker cab installer.

## Download .cab Installation Packages

StockTaker .cab install packages are available on the [www.StockTakerSoftware.com](http://www.StockTakerSoftware.com) website for registered users. 4 packages must be installed for Motorola Handhelds:

- Microsoft .Net 3.5 Compact Framework: **NETCFv35.wm.armv4i.cab**
- OpenNETCF library: **SDF2.3.cab**
- Motorola Symbol driver library: **symbol.all.arm.cab.**
- StockTaker: **StockTakerHandHeldInstaller.cab**

## Installing Updates

The following procedure is recommended for installing an updated version of StockTaker:

1. If StockTaker is currently running on the handheld, exit from StockTaker. Refer to the StockTaker Handheld user guide for instructions on how to do this.
2. On the handheld tap **Start Menu → Settings → System tab** (at the bottom of the screen) **→ Remove Programs.**
3. Select StockTaker and tap the **Remove** button. Tap the **Ok** button at the top of the screen. StockTaker should then be removed from the handheld.
4. If you are using an MSI to install StockTaker, remove the install directory that was created when the StockTaker application was originally installed. This directory will be located on the computer from which the previous version of the installer was run. The usual path for the install directory is c:\Program Files\StockTaker\StockTaker\
5. Follow the install instructions as outlined in the **Running the Install or Alternate Install Methods** section of this document.

## StockTaker Initialization File

The StockTaker initialization file (StockTaker.ini) is used to associate StockTaker with a specific health facility and to configure how the StockTaker application runs. Below is a description of the fields that make up the file.

<b>StockTakeBackUp:</b>	The file path where stock take data is stored before it is uploaded to the server. <b>DO NOT EDIT THIS FIELD.</b>
<b>TransactionPath:</b>	The file path where incomplete stock take data is stored. <b>DO NOT EDIT THIS FIELD.</b>
<b>LicenceKey:</b>	Licence key. The value for this field is found in the Licence.txt file on the install CD.
<b>FacilityId:</b>	The ID of the health facility
<b>FacilityDesc:</b>	A description of the health facility
<b>WebServiceUrl:</b>	The URL for the StockTaker web services
<b>KioskMode:</b>	A flag to indicate if StockTaker will be the only application the user is able to access on the device. "true" indicates StockTaker is the only application the user is able to access. "false" indicates the user will be able to exit out of StockTaker and access other applications.
<b>AdminPw:</b>	Password used to exit out of StockTaker running in kiosk mode. It is also used to access the Settings screen. This password should not be disclosed to the user if you do not want them to exit StockTaker. This field is empty if StockTaker is not running in kiosk mode. <b>The admin password must be numeric and 4 digits long. The default admin password is 2006.</b>
<b>DefaultStart:</b>	This field identifies the feature that will be displayed when StockTaker starts up. The two features are StockTaker and StockReceiver. The features available to you are determined by your licence.
<b>HHT File Prefix:</b>	This field is prepended to each HHT file produced by StockTaker.

Each field in the ini file must appear on a separate line and the fields must appear in the order they are listed above. The ini file must be placed in the same directory as the StockTaker application on the handheld (\Program Files\StockTaker\). Below is an example of what an ini file looks like.

```
StockTakeBackUp~\Program Files\StockTaker\StockTakeFile
TransactionPath~\Program files\StockTaker\IncompleteTransaction
LicenceKey~YURLICENCE
FacilityId~GBS HC
FacilityDesc~Sample Hospital
WebServiceUrl~http://comp1/StocktakerWebServices/WebServices.asmx
KioskMode~false
AdminPw~2006
DefaultStart~STOCKTAKER
```

## Alternate Install Methods

### Please Note:

- If you are able to connect to the device using Microsoft ActiveSync, you do not need to use one of the following install methods. Please proceed to the section **Running the Installer** of this document for instructions on how to install using ActiveSync.
- If you are not using ActiveSync, you will need to ensure the date, time and time zone are set correctly on the handheld. Stock take date is dated and uploaded into MEDITECH using the date and time on the handheld.
- **Kiosk Mode Notes:**
  - To run StockTaker in kiosk mode, you will need to manually start the application after the install process is complete (Start Menu → Programs → StockTaker).
  - Ensure the Windows Mobile Today screen timeout is turned off. To turn off the Today screen timeout on the handheld, tap **Start Menu → Settings → Today → Item Tab** and uncheck the **Today timeout** checkbox.
  - **Dolphin Devices:** Ensure that the functionality for the programmable side buttons is set to None. To do this tap **Start Menu → Settings → Buttons**. You will see a list of buttons. Ensure **LSide** and **RSide** are both set to **<None>**.

### *Option 1: Using a Memory Card*

You will need the following to install StockTaker using a memory card:

- 1) A memory card containing the StockTaker install file (.cab file) and the StockTaker.ini file. Refer to the section **StockTaker Initialization File** of this document for information on the ini file.
  - 2) A handheld device that can read memory cards (SD, MiniSD, Memory Stick, or Compact Flash)
- Make a copy of the StockTaker.ini file (found in the Network Install folder) and update the following fields to match the details of the health facility that the handheld will belong to. Refer to the section **StockTaker Initialization File** of this document for information on the ini file. Do not update any other fields in the ini file.

<b>LicenceKey:</b>	Licence key
<b>FacilityId:</b>	The ID of the health facility
<b>FacilityDesc:</b>	A description of the health facility
<b>WebServiceUrl:</b>	The URL for the StockTaker web services
<b>KioskMode:</b>	A flag to indicate if StockTaker will be the only application the user is able to access on the device.
<b>AdminPw:</b>	A password that allows administrators to exit out of StockTaker when it is running in kiosk mode. The password is also used to access the Settings screen. This password should not be given to regular users.

- Insert the memory card into the handheld device.
- Use the File Explorer application (Start Menu → Programs → File Explorer) to view the contents of the memory card and copy the .cab files to the Temp directory (My Device → Temp) on the handheld device.
- Tap on **NETCFv35.wm.armv4i.cab** file in the Temp directory to install the Microsoft .Net Compact Framework 3.5 Installer.
- Tap on **SDF2.3.cab** file in the Temp directory to install the OpenNETCF library.
- If using a Motorola Handheld such as a M55, MC75, tap on **the symbol.all.arm.cab** file in the Temp directory to install the Motorola Symbol driver library
- Tap on **StockTakerHandHeldInstaller.CAB** to install StockTaker
- Use the File Explorer application to copy the StockTaker.ini file from the memory card to the StockTaker directory (\Program Files\StockTaker).
- You are now ready to run StockTaker.

## **Option 2: Using a Network Share**

The handheld device must meet the following criteria to install StockTaker using a network share:

- 1) Your device is connected to the network (wirelessly or via an Ethernet cradle)
  - 2) You can use the device to browse to a network share on your network.
- Create a network share on your network and copy the 4 .cab install packages from the [www.StockTakerSoftware.com](http://www.StockTakerSoftware.com) website.
  - Update the following fields in the StockTaker.ini file to match the details of the health facility that the handheld will belong to. Refer to the section **StockTaker Initialization File** of this document for information on the ini file. Do not update any other fields in the ini file.

<b>LicenceKey:</b>	Licence key
<b>FacilityId:</b>	The ID of the health facility
<b>FacilityDesc:</b>	A description of the health facility
<b>WebServiceUrl:</b>	The URL for the StockTaker web services
<b>KioskMode:</b>	A flag to indicate if StockTaker will be the only application the user is able to access on the device.
<b>AdminPw:</b>	A password that allows administrators to exit out of StockTaker when it is running in kiosk mode. The password is also used to access the Settings screen. This password should not to be given to regular users.

- Ensure your device is connected to the network

- On the device, click on the Start Menu → Programs → File Explorer. Tap on the network share icon once File Explorer is running:



- Enter the UNC path to the network share and tap **OK**:



- Enter the username and password for an account that has access to the network share. The account can be local to the computer where the network share resides or it can be a domain account.



- Tap and hold on StockTakerHandHeldInstaller.CAB file name and select **Copy** from the pop up dialog :



- Tap on the Device icon and navigate to the Temp folder on the device:



- Tap and hold the stylus on an empty part of the screen and select **Paste** from the pop up dialog:



- Repeat the above process to copy the updated StockTaker.ini file from the network share to the Temp directory on the device.
- For StockTaker version 2.0 and greater, repeat the above process to copy the NETCFv35 cab, SDF2.3 cab and Symbol.all.arm cab (if applicable) file from the network share to the Temp directory. Once copied, tap on this file to install the OpenNETCF library. This is not required for earlier versions of StockTaker.
- Tap on the StockTakerHandHeldInstaller.CAB file in the Temp directory to install the StockTaker handheld application to the device. When the install process is finished, copy the updated StockTaker.ini file from the Temp directory to the Program Files\StockTaker directory on the device.
- You are now ready to run StockTaker.

## Running the Installer

- Run the following executable to install the StockTaker application to the handheld:
  - StockTakerInstaller\_XXX....msi (XXX... represents the type of handheld you are installing to)

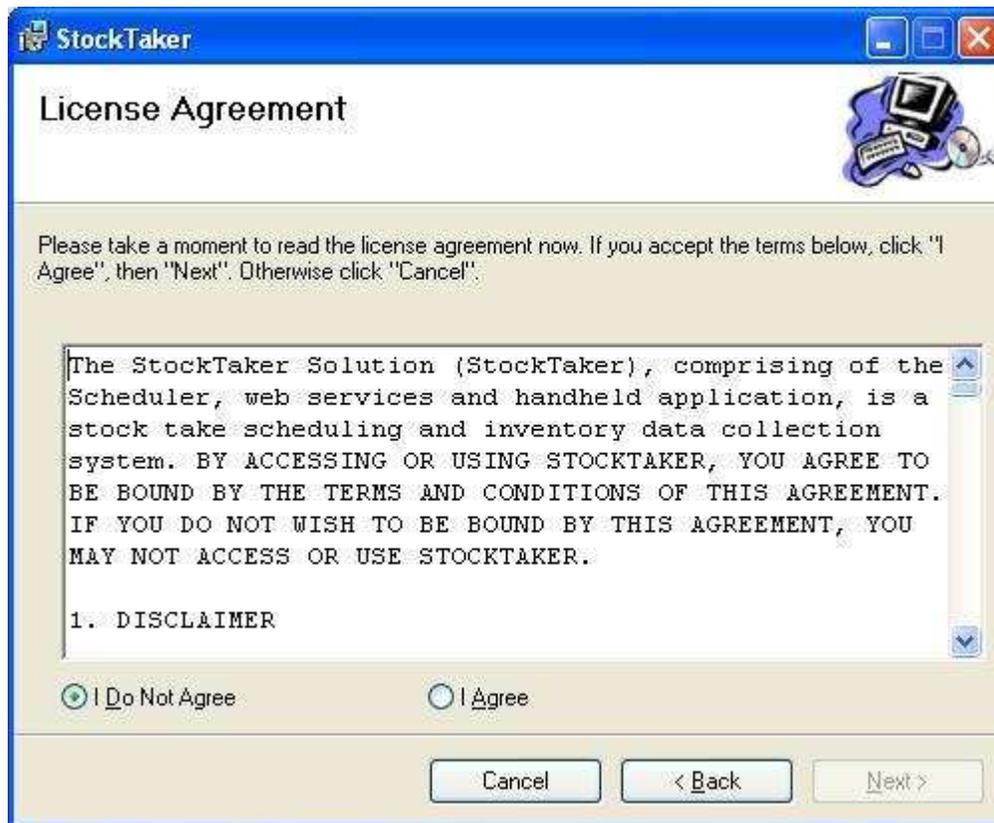


- The following screen will be displayed:

Click **Next** to continue.

## Licence Agreement

- Read through the licence agreement. Select “I Agree” if you are in agreement with the licence and click Next. You will not be able to install StockTaker if you do not agree to the licence.



## Initialization Settings

- Health facility name and ID:
  - Enter the ID and name of the health facility, which the handheld belongs to. For example, if the handheld will be used in the “StockTaker Health Campus”, which has an ID of ST HC, you would enter ST HC for the health facility ID and StockTaker Health Campus for the Health Facility Name.
- Web services URL:
  - This is the URL where the StockTaker web services are located. At the very least, you will need to replace “SCHEDULER\_SERVER” with the name of the server that hosts the StockTaker web services. Contact your system administrator if you are unsure of the URL for the StockTaker web services.
- Licence Key:
  - This required field is provided to you when you purchase StockTaker. The licence key can be found in the Licence.txt file on the CD. The licence key must be entered correctly or the installation process will fail.
- NOTE: If the Health facility ID and/or web services URL are incorrect, the StockTaker



The screenshot shows a Windows-style dialog box titled "StockTaker" with a sub-title "Initialisation Settings". The dialog contains a warning message: "The following settings will be used to identify the location of the handheld. Make sure the data is entered correctly otherwise the installation will fail or the StockTaker application will not function properly." Below this are four input fields, each with a label and a "REQUIRED" status:

- Health Facility ID (maximum of 7 characters): REQUIRED
- Health Facility Name (maximum of 50 characters):
- StockTaker Web Services URL: REQUIRED (with the example text "http://SCHEDULER\_SERVER/StockTaker/WebServices/WebServices.asmx" entered)
- Licence Key: REQUIRED

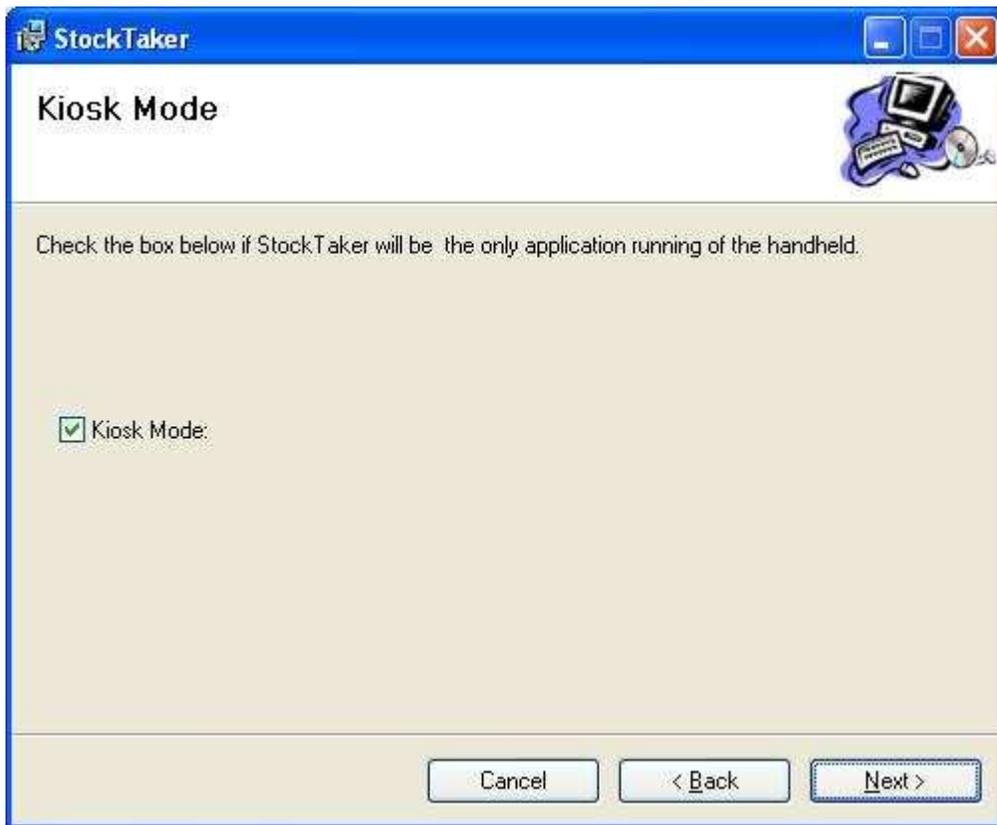
At the bottom of the dialog are three buttons: "Cancel", "< Back", and "Next >".

application will not function correctly.

- Click **Next** when you are finished entering these details.

## Kiosk Mode

- Check the Kiosk Mode box if you do not want the user to be able to access any other application besides StockTaker. If the Kiosk Mode box is unchecked, the user will be able to exit from StockTaker and run other applications on the handheld.
- **NOTE:** It is still possible to exit StockTaker if it is running in kiosk mode. However, you will need the admin password to do so. The default admin password is **2006**. You can change the default admin password by changing it in the StockTaker ini file. Refer to the section **StockTaker Initialization File** of this document for information on the ini file.



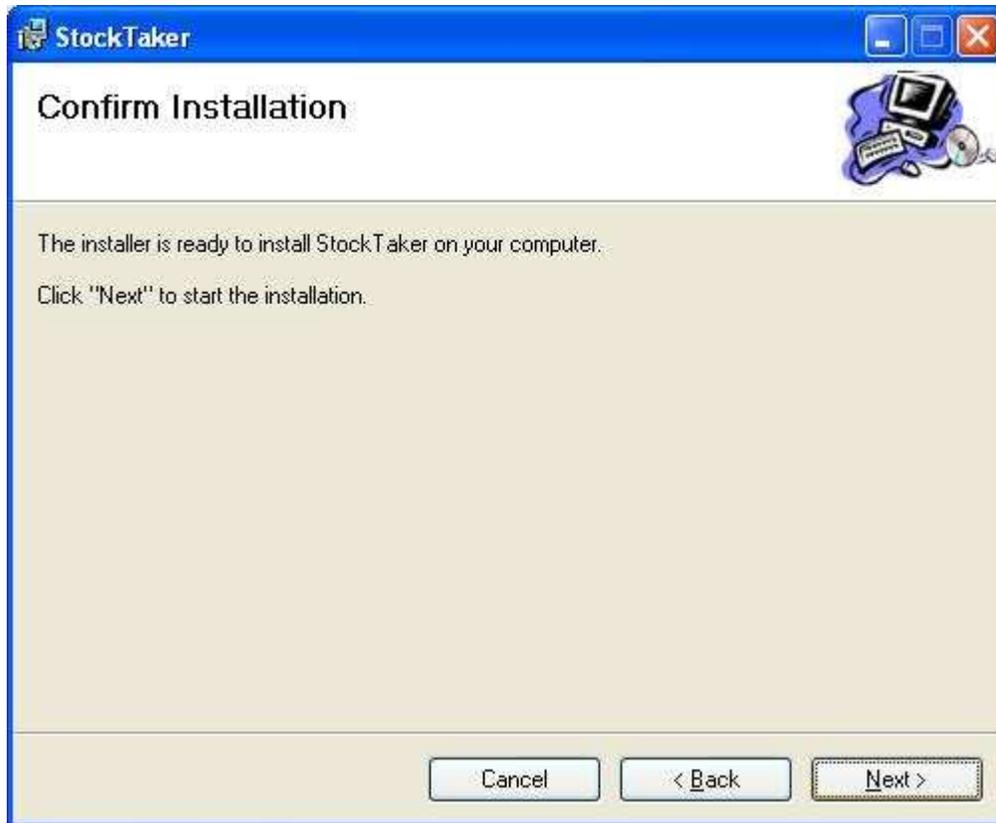
## Installation Folder

- Select a location where you want to place the installation files. You will need to remember this location as the installer will place the StockTaker initialization file here (more on this later).
- Select “Just Me” when asked who the application should be installed for.
- Click **Next** to continue.



## Confirm Installation

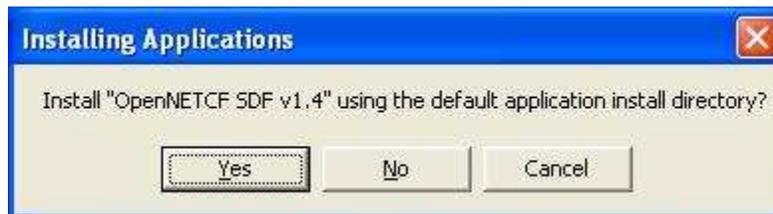
- You are now ready to install the StockTaker application to the handheld. Ensure that the handheld is connected to the computer and click **Next**.



## Downloading the Application to the Handheld

### OpenNETCF (StockTaker version 2.0 and higher)

- If you are using StockTaker version 2.0 or higher, the OpenNETCF library will be installed to the handheld. Click **Yes** when prompted to install OpenNETCF to the default install directory.



- Check the handheld screen to verify that no further action is required and then click the **OK** button.



- Click **Yes** when prompted to install StockTaker to the default install directory.



- StockTaker will then be downloaded to the handheld.



- Check the handheld screen to verify that no further action is required and then click the **OK** button.



## Installation Complete

- The application has now been successfully installed to the handheld. Refer to the StockTaker user's guide for instructions on using the application.
- Click **Close** to close the installer.



## **Setting Up an ActiveSync Partnership**

- If ActiveSync is used to connect the handheld to the network, a partnership must be established between the handheld and ActiveSync running on the machine to which the handheld will connect (at the health facility where it will be used). It is recommended that a standard partnership be created (as oppose to a guest partnership). Refer to the ActiveSync documentation for more information about setting up partnerships.

# Trouble Shooting

## *Kiosk Mode*

- **StockTaker exits if the handheld is left inactive for a period of time:**  
A possible cause for this is that the Today screen timeout is turned on. This causes the Today screen to be displayed after a period of inactivity. To turn off the Today screen timeout on the handheld, tap **Start Menu → Settings → Today → Item Tab** and uncheck the **Today timeout** checkbox.

## *Install Errors*

- **“Failed to create application short cut. Ensure that StockTaker is not already installed on the handheld and rerun the installer.”**  
This error occurs when you are trying to install StockTaker in kiosk mode when a version of StockTaker is already installed on the handheld. Uninstall StockTaker from the handheld and rerun the installer.
- **“Failed to copy the initialization file to the handheld: A connection to the handheld could not be established. Ensure that the handheld is connected to this computer and re-run the installer.”**  
This error will occur if the handheld is not properly connected to the computer from which the installer is being run. Make sure the handheld is connected to the computer and re-run the installer.
- **“An error has occurred while trying to install the application to the handheld. Verify that Microsoft ActiveSync is installed.”**  
The most likely cause of this error is that Microsoft ActiveSync is not installed on the computer from which the installer is run. ActiveSync can be downloaded from the Microsoft web site.
- **“Could not locate Microsoft ActiveSync. Make sure it is installed and re-run the installer.”**  
This error will occur if Microsoft ActiveSync is not installed on the computer from which the installer is run. ActiveSync can be downloaded from the Microsoft web site.
- **“Failed to initialise the remote API. Ensure Microsoft ActiveSync is installed and re-run the installer.”**  
The most likely cause of this error is that Microsoft ActiveSync is not installed on the computer from which the installer is run. ActiveSync can be downloaded from the Microsoft web site.

## **Runtime Errors**

- **“An initialization file could not be found.”**

This error could occur for one of the following reasons:

1. The StockTaker application was installed to a directory other than the default application install directory (see ***Downloading the Application to the Handheld*** earlier in this document). If this is the case, the best solution is to reinstall StockTaker ensuring that it is installed to the default application install directory. Refer to ***Installing Updates*** earlier in this document for instructions on reinstalling StockTaker.
2. The initialization file was not created or did not get copied to the handheld successfully. To resolve this, you can either re-run the installer or locate a copy of the initialization file on the PC and manually copy it to the directory on the handheld where the StockTaker application has been installed. A copy of the initialization file should be located in the installation folder specified during the installation process (see ***Installation Folder*** earlier in this document). Refer to the handheld’s user documentation for instructions on copying files to the handheld.

## Support

- For support, please contact StockTaker:
  - Email: [Support@StockTakerSoftware.com](mailto:Support@StockTakerSoftware.com)
  - Web: [www.StockTaker.com](http://www.StockTaker.com)