PC companion
scale data reporting software

Cardinal
Cardinal Scale Manufacturing Co.

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PC Companion Overview

PC Companion is a database driven reporting application. When using the USB-A external storage option on Cardinal Scale 200 series indicators, the data can easily be imported into the PC Companion application, allowing a user to generate reports showing transaction information. Using either the standard option of a SQL compact database or with the option of using SQL Server / SQL Server Express, the application lends itself to its users needs.

For further information on USB-A and 200 series indicators
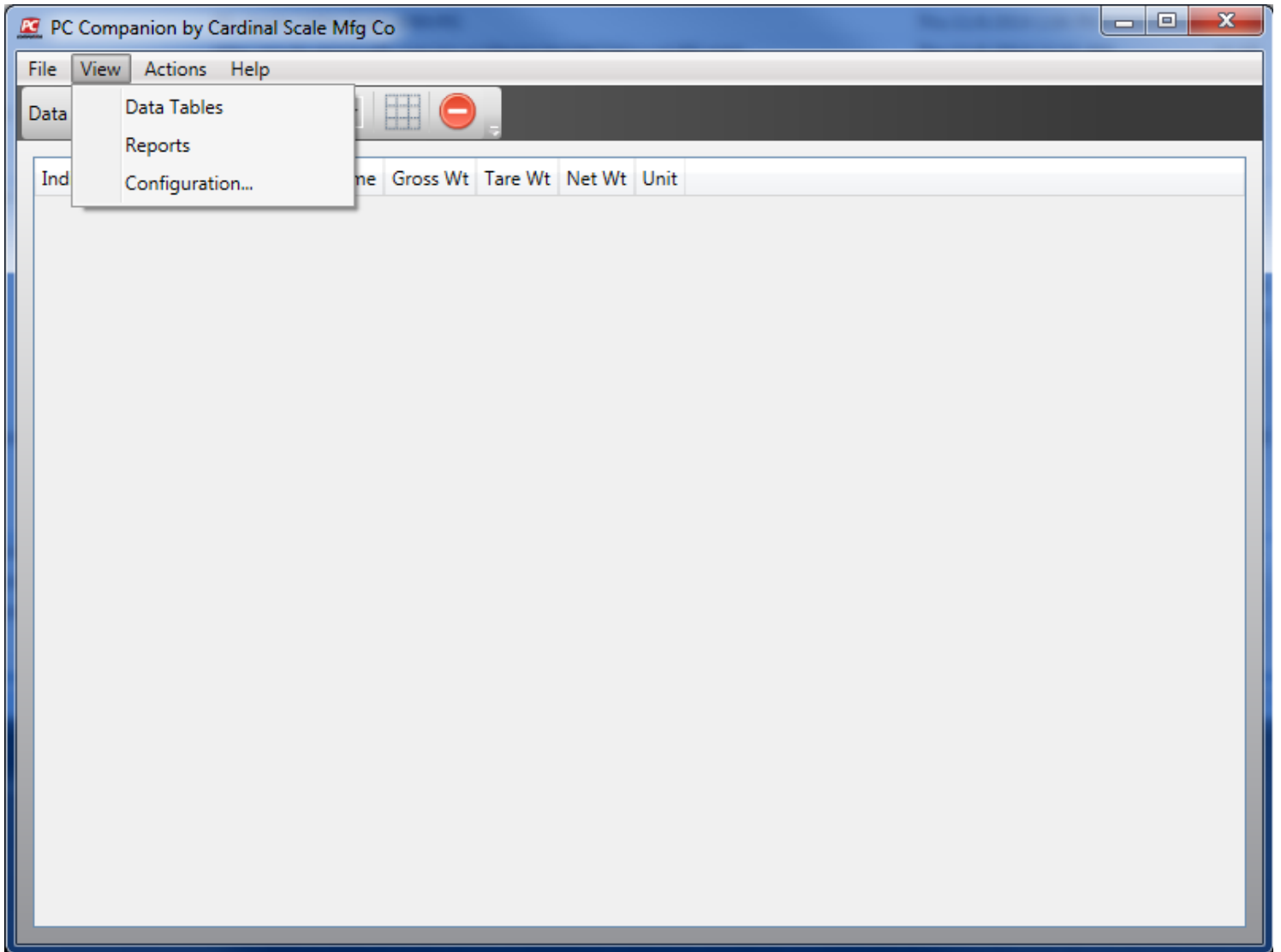- www.cardinalscale.com
- (800) 441-4237

This manual has been created in support of PC Companion version 2.x.x.

PC Companion supports the following operating systems.
- Windows XP
- Windows Vista
- Windows 7
- Windows 8.0
- Windows 8.1

Configuration

The software configuration may be reached by clicking on View on the menu at the top of the window and choosing Configuration.

The configuration window will look similar to that shown below. This is primarily used for database setup (see next section), but it also contains a selection of the default units that will be used when showing reports (this can be changed on the reports view).

PC Companion Configuration

Database Setup

◉ Use SQL Compact

Database File Location
C:\ProgramData\Cardinal Scale Mfg\Companion\companion.sdf

[Browse...]

○ Use SQL Server

Server Name [   ]   Instance Name [   ]

☑ Use Integrated Security   Username [   ]

                              Password [   ]

[Test SQL Server Connection]

General Setup

Default Report Unit [lb ▼]

[Done]

Database Setup

When PC Companion is first started, the default selection of SQL Server Compact is selected and a default path to the operating system's program data directory is used. On Windows Vista/7/8/8.1 this will be the C:\ProgramData\Cardinal Scale Mfg\Companion\ directory. For Windows XP this will be C:\Documents and Settings\All Users\Application Data\Cardinal Scale Mfg\Companion\. At first startup, a new SQL Server Compact database will be created automatically. The name of the database is companion.sdf.

To switch the database to use and existing SQL Server / SQL Server Express, click on the "Use SQL Server" option in the configuration window and fill out all necessary information that will allow PC Companion to successfully connect to the SQL Server.

Parameter Information

Server Name
> The computer name of the machine on which the SQL Server software resides.

Instance Name
> Sometimes SQL Server (and always with SQL Server Express) can be setup with multiple instances, each with its own distinguishing name. If the installation of SQL Server has been given an instance name, this must be entered here.

Use Integrated Security
> This option tells the software to use this user's Windows credentials to access the SQL Server. This is also known in the SQL Server software as "Windows Authentication". If this is not desired, then uncheck this option which will allow the "Username" and "Password" fields to be entered.

Username
> The user name of the SQL Server credentials to be used to access the SQL Server.

Password

The password of the SQL Server credentials to be used to access the SQL Server.

Ensuring SQL Server Connectivity

Once the connection information for SQL Server has been entered, it is suggested that this information be tested using the "Test SQL Server Connection" button. If done is clicked, the software will automatically try to test the connection and if there is a problem, a notification box appears.
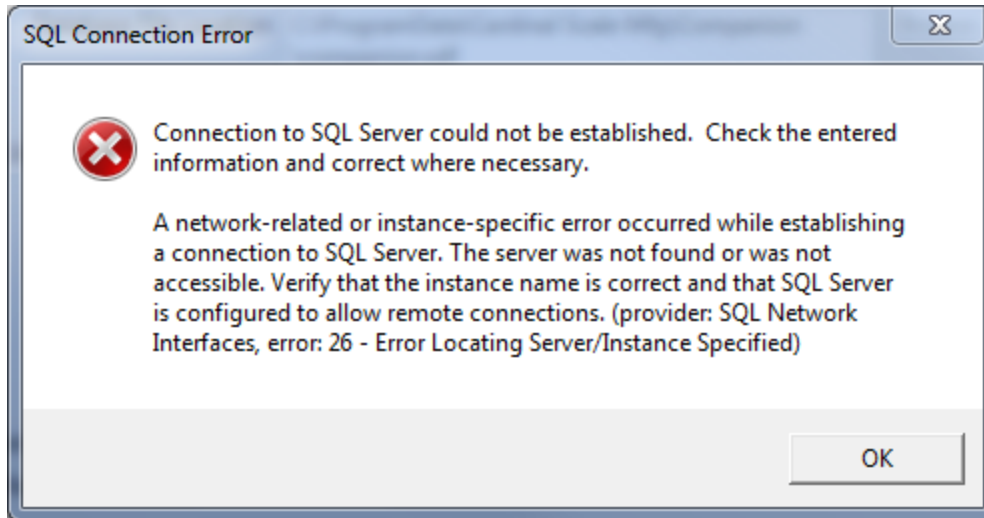
If the test is successful, and the "Done" button has been clicked, the software will attempt to find the database on the SQL Server. If it does not exist, it will be created automatically.

Importing Data

There are two different types of data imports PC Companion can handle: transactions and identifiers. When a thumb-drive is inserted into the USB-A card of a Cardinal Scale 200 series indicator, any transactions performed will be recorded to the thumb-drive as will any identifiers. This is the data that the software will try to import.

Also, now supported in version 2.0, Cardinal Scale 825 transactions can be exported to a thumb-drive using the on-board USB slots. This requires that the 825 has the latest ID Storage application. Please contact Cardinal Scale Mfg for more information on how to identify the proper 825 ID Storage application.

Supported Indicator Models, Modes of Operation, and Import Types

Transactions

- 205
  - Standard
- 210 / 212G / 212GX
  - Standard
  - Digital Fill Control
  - Check-weigh
  - ID Storage
  - Axle Weigh
  - Preset Weight Comparator
  - Livestock Weigh
- 225
  - Standard
  - Digital Fill Control
  - Check-weigh
  - ID Storage
  - Preset Weight Comparator
  - Batching
  - Package Weigh
- 825
  - ID Storage

Identifiers

- 210 / 212G / 212GX
  - Digital Fill Control
  - ID Storage
- 225
  - ID Storage

Auto-Detecting Data

When PC Companion is running on the computer, it is actively looking for a USB thumb-drive with importable data to be inserted into an open slot. Once inserted and importable data verified, a new window will appear showing all removable drives that have importable data. If the import window does not appear when inserting a USB thumb-drive, then the software has determined there is not data on that device that it can import.

Note: Although transactions are stored a comma-delimited data files, this is not the only file the indicator writes to the thumb-drive. PC Companion will also search for the other necessary files before it determines if there is importable data. If this other information is not present, then the import window will not appear.

Note: If the thumb-drive with importable data is already attached to the computer when PC Companion is started, the software will NOT automatically detect this drive. It only searches a removable drive when it is running and a new removable drive is added. In this case, an import request will need to be performed by the user.
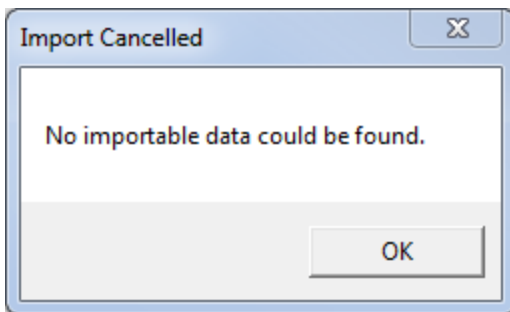
Requesting Import

To request an a check for importable data, select "Import From USB" from the "Actions" menu item.
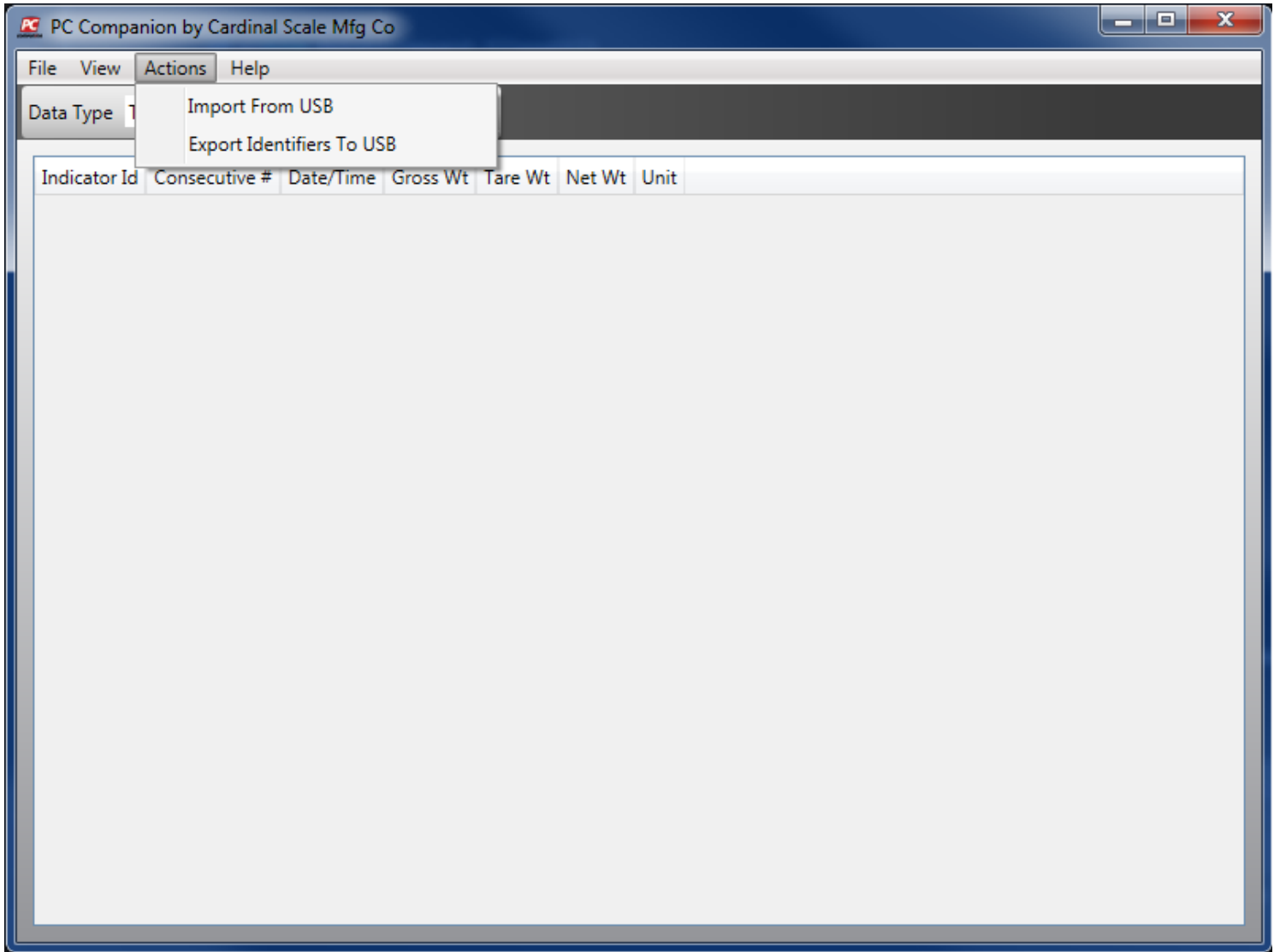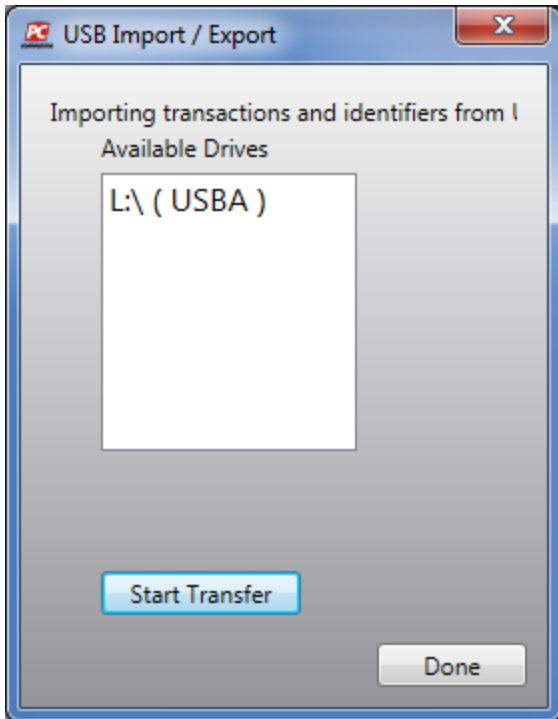

Request Failure

If there is not a removable drive with importable data, then a message box stating this will appear.


Request Success

If data is found, the import window will appear.
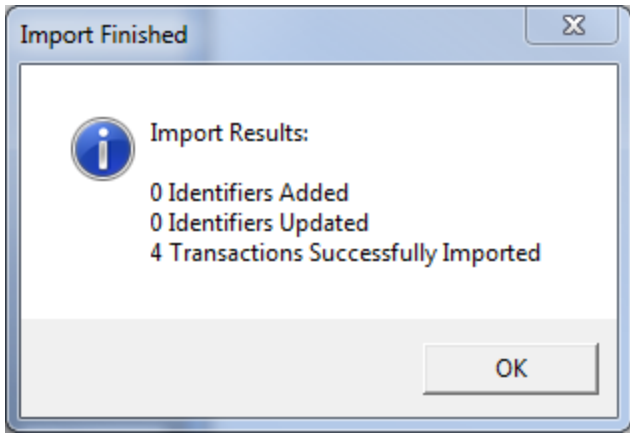
Import Window

The import window allows the user to select any removable drives (one at a time) from which to import data. The list box will show all drives, including their volume names, that contain importable data. To import this data, select a drive from list and click the "Start Transfer" button. If no drive is selected when the "Start Transfer" button is clicked, then an error message will appear.
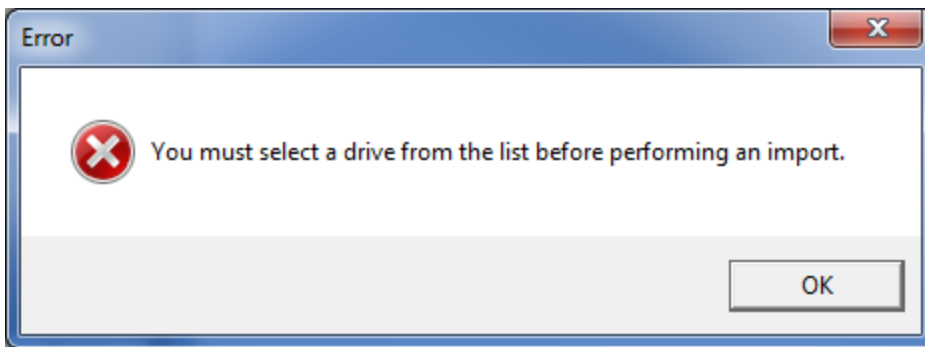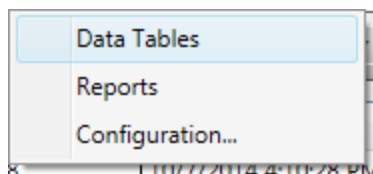

Once the data import begins, a progress bar will appear on the import window showing the status of the import. When the import has completed, a message window will appear stating the number of imported records and what type of records they were. Once the import window is closed, the transaction data view and identifier data view will be refreshed and show the newly imported data.

Import Finished

Import Results:

0 Identifiers Added
0 Identifiers Updated
4 Transactions Successfully Imported

OK

Transaction Data

Transaction data can be reviewed on the Data Tables View. The "Data Type" drop down must be set to "Transactions".
If the current view is the Reporting View, simply select "Data Tables" from the "View" menu.

Note: Transaction data cannot be added or edited manually.

Transaction Columns Setup

 Grid Icon

Depending on the type of transaction data stored in the software, it might be preferable to show different columns than what is shown by default. The grid icon on the tool bar is used to select the columns of data to display in the grid. Left click on the grid icon and a drop down list of available fields will display. The column options have been placed in groupings to make finding them easier. The groups are based on indicator modes of operation. Place a check next to the columns that should be shown and un-check any that should be hidden. When selected, this information will save between uses of the software. Left click anywhere off of the drop down list to hide it.

Deleting Transactions

The only type of manual manipulation of the transaction data that is allowed is deleting a single or group of transactions.

Delete Icon

In order to delete a single transaction, select the desired transaction from the list of transactions and click the delete icon on the tool bar. Once the delete icon is clicked, a confirmation message will appear. Click 'Yes' to proceed with the delete, or click 'No' to cancel.

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File   View   Actions   Help
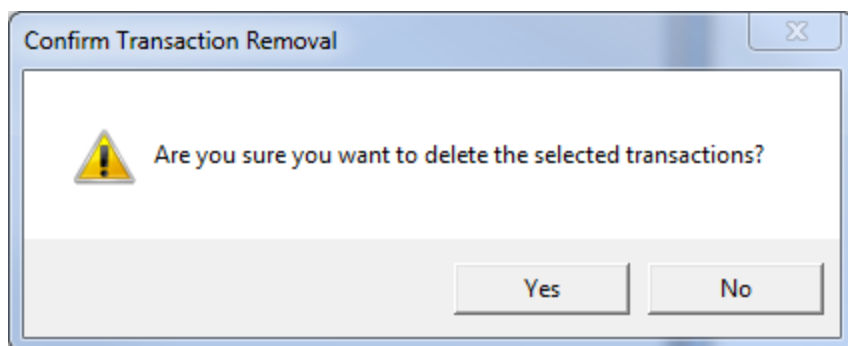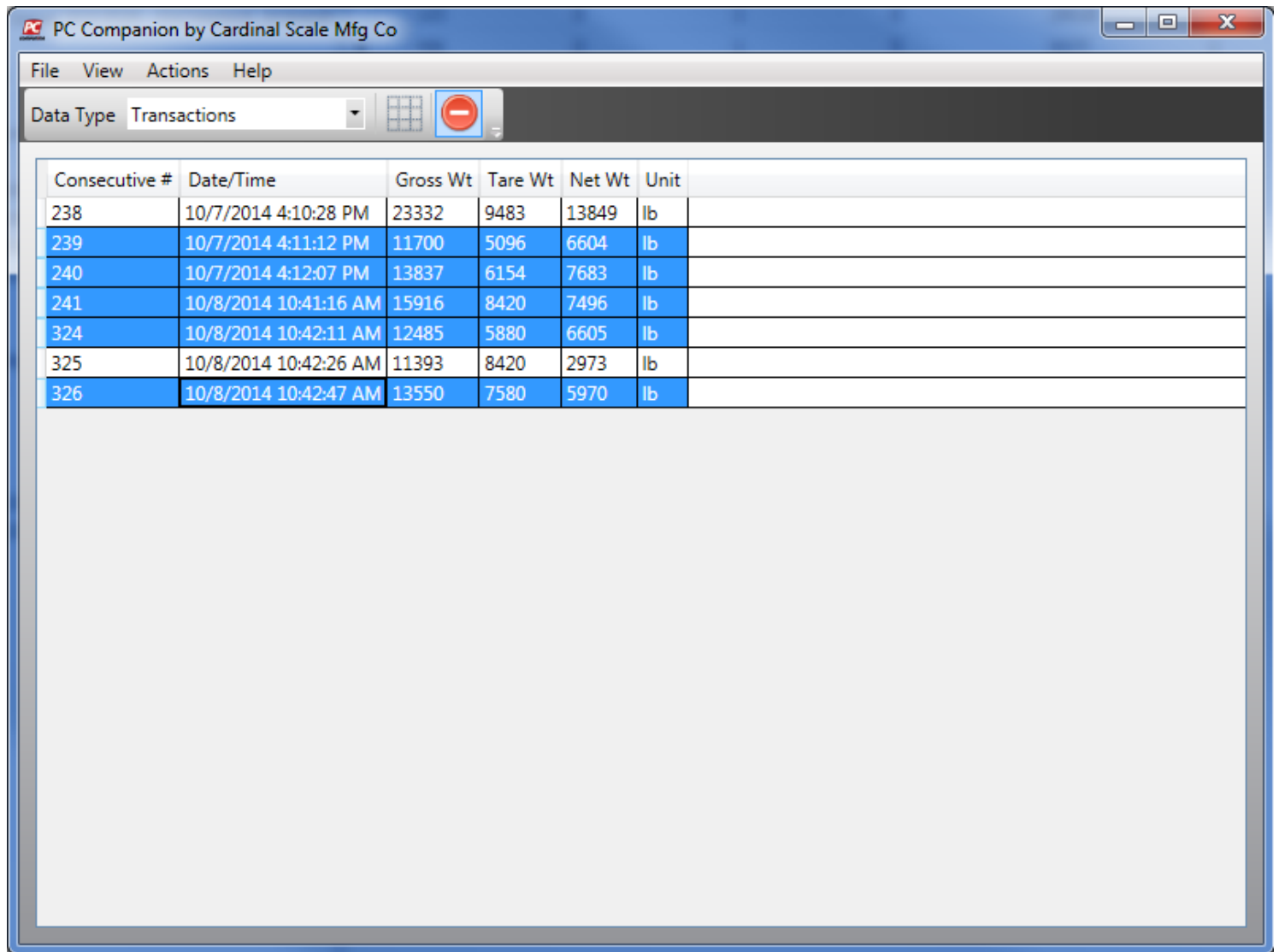
Data Type   Transactions

Consecutive #	Date/Time	Gross Wt	Tare Wt	Net Wt	Unit
238	10/7/2014 4:10:28 PM	23332	9483	13849	lb
239	10/7/2014 4:11:12 PM	11700	5096	6604	lb
240	10/7/2014 4:12:07 PM	13837	6154	7683	lb
241	10/8/2014 10:41:16 AM	15916	8420	7496	lb
324	10/8/2014 10:42:11 AM	12485	5880	6605	lb
325	10/8/2014 10:42:26 AM	11393	8420	2973	lb
326	10/8/2014 10:42:47 AM	13550	7580	5970	lb

Confirm Transaction Removal

⚠ Are you sure you want to delete the selected transactions?

Yes   No

In order to delete a group of transactions, either using the contiguous selection (SHIFT) or the multi-select (CTRL), select the desired transaction from the list of transactions and click the delete icon on the tool bar. Once the delete icon is clicked, a confirmation message will appear. Click 'Yes' to proceed with the delete, or click 'No' to cancel.
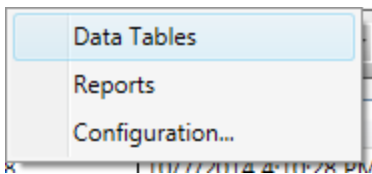

Note: *Once a transaction has been deleted, it cannot be recovered.*

Identifier Data

Identifier data can be reviewed on the Data Tables View. The "Data Type" drop down must be set to "Identifiers". If the current view is the Reporting View, simply select "Data Tables" from the "View" menu.

Identifier Columns Setup

 Grid Icon

Depending on the type of identifier data stored in the software, it might be preferable to show different columns than what is shown by default. The grid icon on the tool bar is used to select the columns of data to display in the grid. Left click on the grid icon and a drop down list of available fields will display. The column options have been placed in groupings to make finding them easier. The groups are based on indicator modes of operation. Place a check next to the columns that should be shown and un-check any that should be hidden. When selected, this information will save between uses of the software. Left click anywhere off of the drop down list to hide it.

Editing Identifiers

 Edit Icon

To edit an existing identifier, select the identifier from the list and click the edit button on the tool bar.

Clicking the save button will save any changes. Clicking the cancel button will remove any changes made while the edit window was open.

Note: The "Id Name" cannot be edited. To change the "Id Name" create a new identifier and delete the old one.

Adding Identifiers

 Add Icon

To create a new identifier, click the add button on the tool bar.

Once the identifier creation window appears, fill out any desired data. Only the "Id Name" is required to be filled out. Clicking the save button will create the identifier and add it to the list. Clicking the cancel button will discard the identifier and return to the list.

Deleting Identifiers

 Delete Icon

To remove an identifier from the database, select the identifier to delete and press the delete button on the tool bar. When the button is clicked a confirmation window will appear.
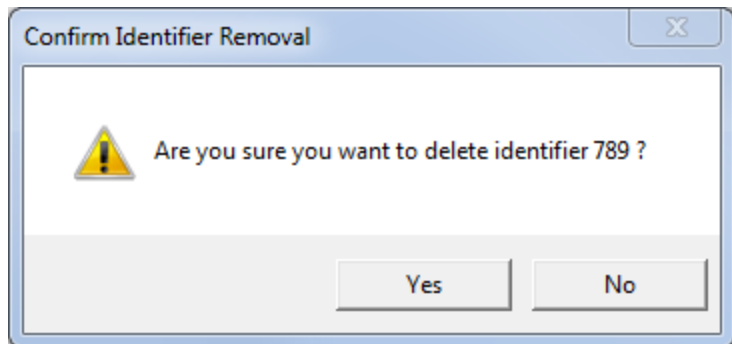
If "Yes" is clicked, the identifier will be permanently removed from the database. If "No" is clicked, the software will not remove the identifier.

Note: Only one identifier may be deleted at a time. If multiple identifiers are selected, the button will be disabled and will not highlight when the cursor is placed over it.

Exporting Identifiers

Identifier data may be exported to certain indicators. Supported indicators and modes of operation are listed here.

- 210 / 212G / 212GX
  - Digital Fill Control
  - ID Storage
- 225
  - ID Storage

A blank or new USB drive **can not** be used to export identifiers. The drive must have been initialized by the indicator that will be importing the identifiers. The reason is that the indicator also writes other configuration files to the drive and these files are needed to properly format the identifiers so that the indicator will know how to import them.

To export the identifiers, use the list to select all those that are desired for export. Then from the menu item "Actions" select "Export Identifiers to USB".
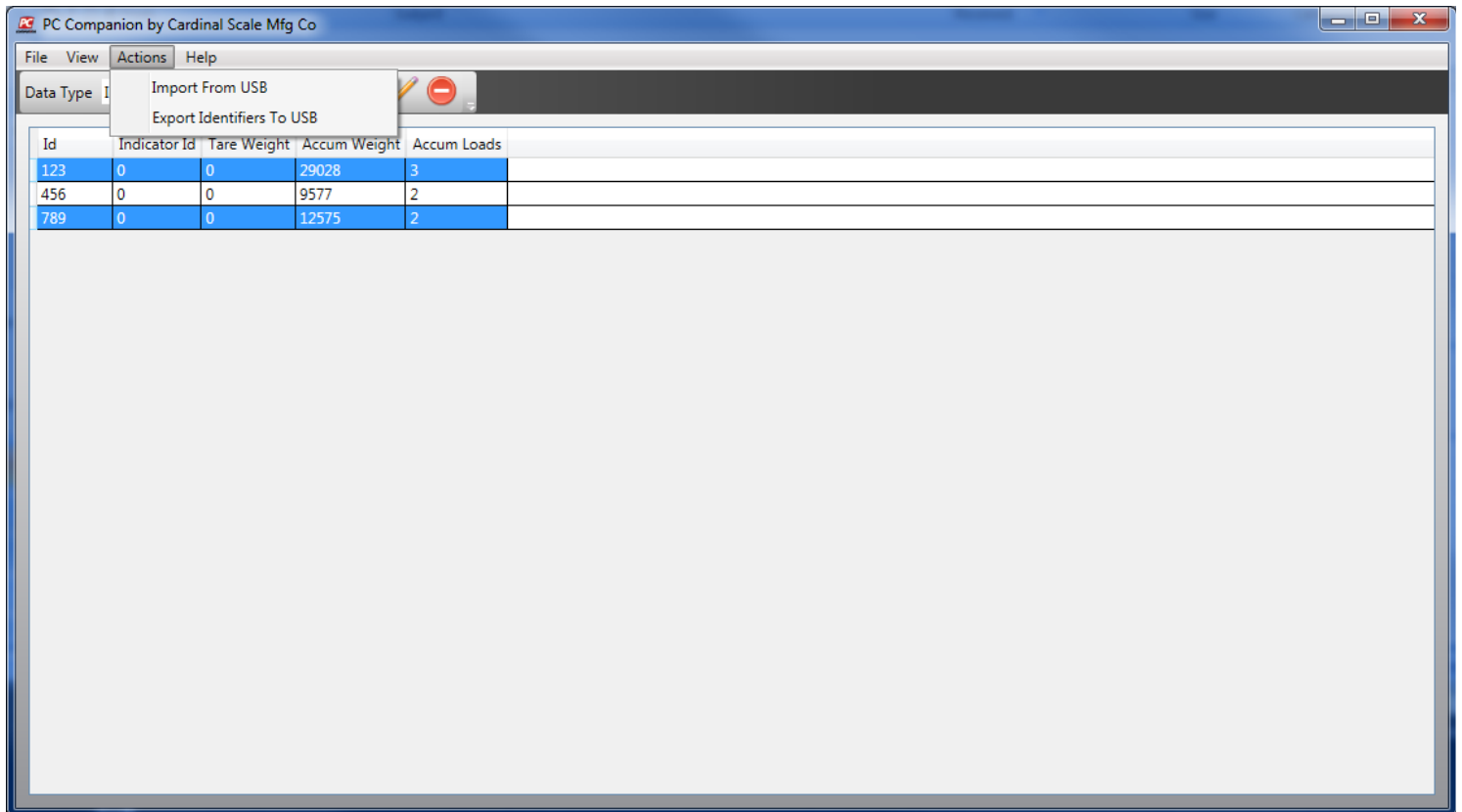
The removable drives currently attached to the computer will be scanned and if any are able to be used for export (see above) then the export window will appear.
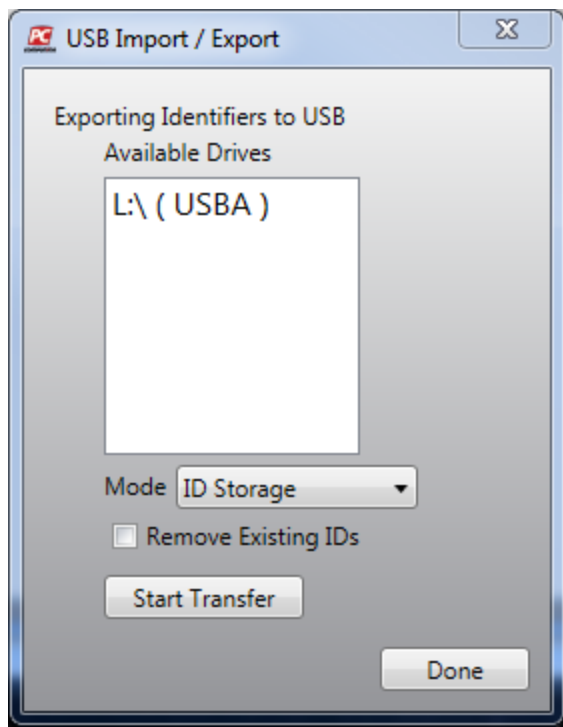
Select the drive to use for export from the list. Select the mode of operation for which the identifiers will be used. The default mode of operation is ID Storage. See the list above for supported indicators and modes of operation.

If the drive already has an identifier file existing, it will be updated with the identifiers to be exported. If the exporting identifiers name matches one already in the file, the information will be updated.

If any identifiers still existing on the drive should be removed before the export occurs, then check the option "Remove Existing IDs".

When ready click the "Start Transfer" button. A progress bar will appear and when done, a new message will appear.
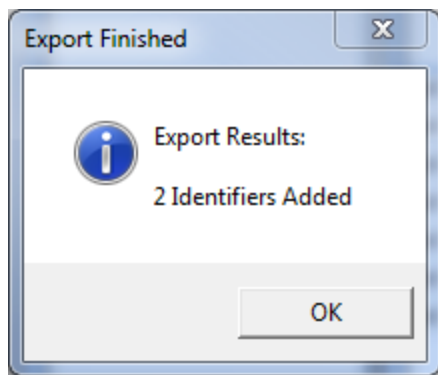
Click the "Done" button when finished.

Troubleshooting Tips

If no drive is selected from the list, the following message will appear. Select a drive and try again.

Error

You must select a drive from the list before performing an export.

OK
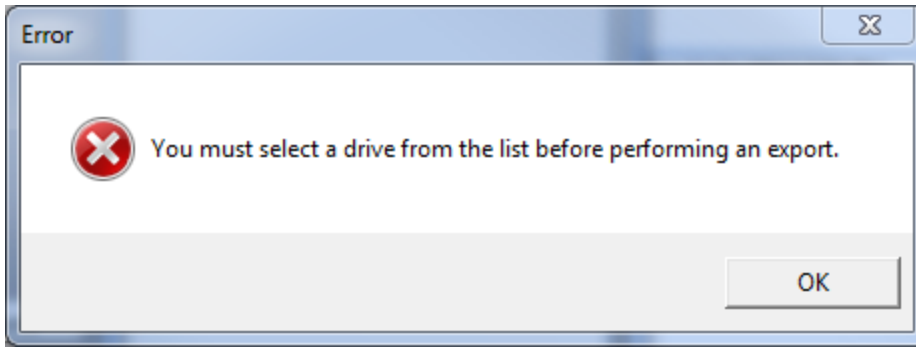
If no identifiers are chosen when the export option is selected, the following message will appear. Select the identifiers to be exported first, then click on the "Export Identifiers To USB" option.

Please select identifiers to export to the removable drive.

OK
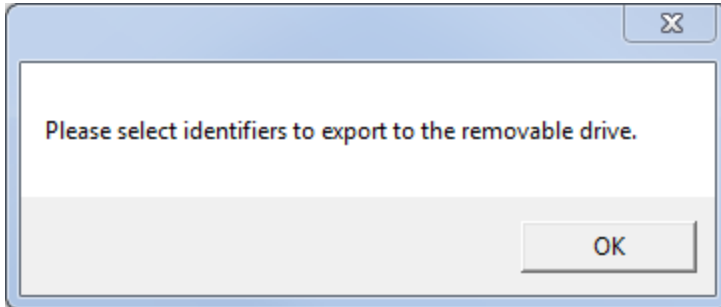
If there are no removable drives which the software can export to, the following message will appear. Initialize the drive in the indicator first, then use it for export from the PC Companion software.

Export Cancelled

No USB-A formatted removable drive could be found.

OK
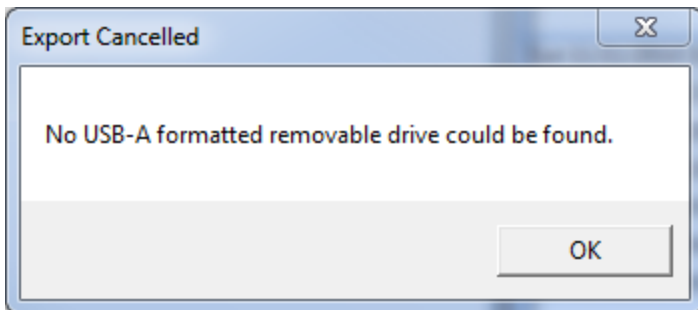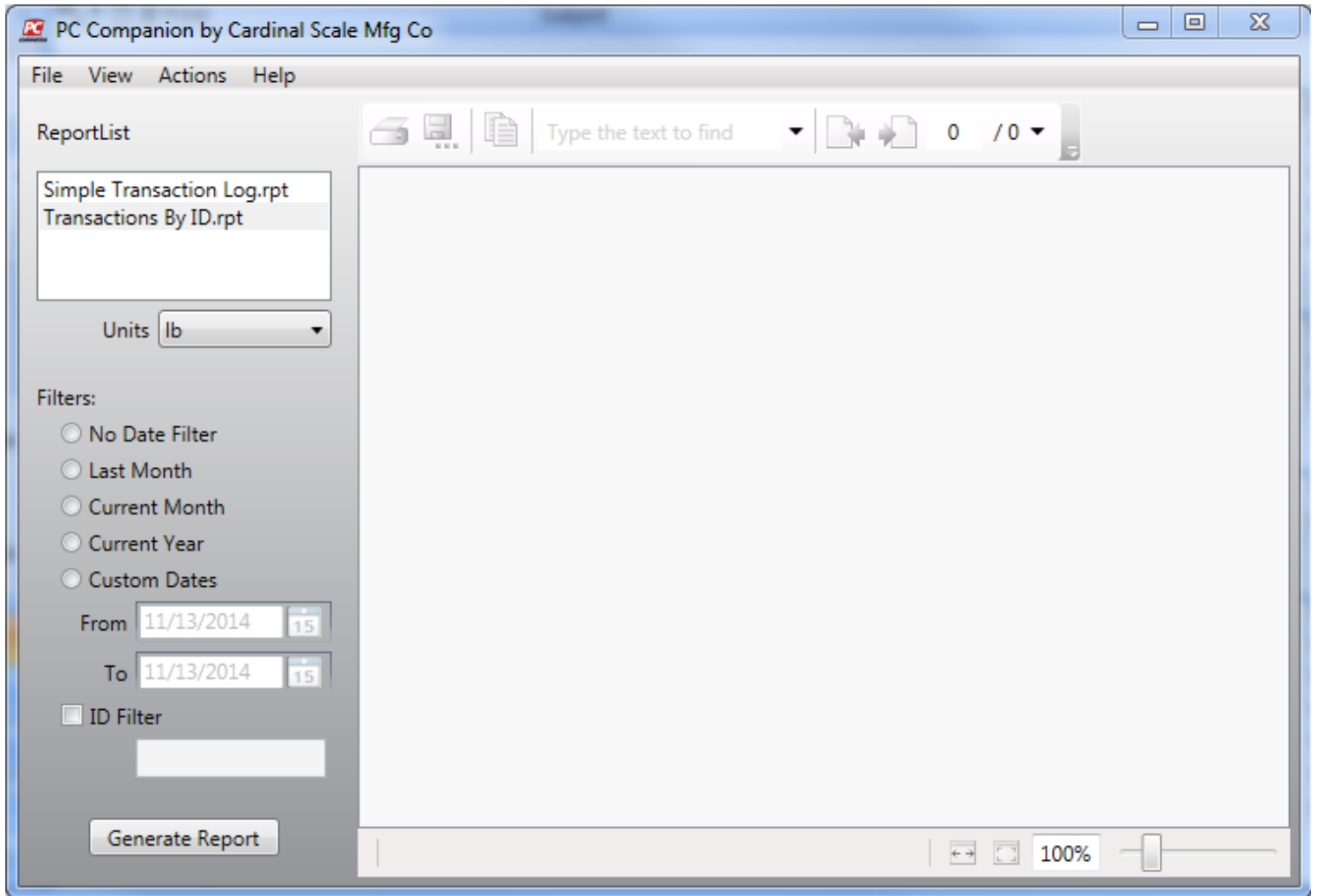
Reports View

To view reports for the data stored in the database, under the "View" menu item click "Reports View".
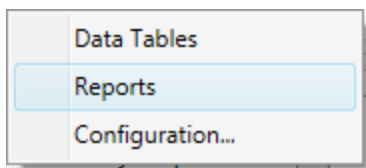
There are two standard reports that come with PC Companion: "Simple Transaction Log" and "Transactions By ID". If something different is desired, contact Cardinal Scales sales offices at (800) 441-4237. The "Units" drop down will be preset to the value selected for the configuration option "Default Report Unit". If a different unit is desired, change this to the desired value. Use the date filter to select a date range for the transactions. If a filter for a particular identifier is desired, check the box for "ID Filter" and then enter the id in the edit box below. The "ID Filter" looks for the value stored in the transaction field "Identifier 1".

When all options have been chosen, click the "Generate Report" button. Below is a sample of each report without any filters set.

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File   View   Actions   Help

ReportList

Simple Transaction Log.rpt
Transactions By ID.rpt

Units lb

Filters:
- ○ No Date Filter
- ○ Last Month
- ○ Current Month
- ○ Current Year
- ○ Custom Dates

From 11/13/2014
To   11/13/2014
☐ ID Filter

Generate Report

Preview

Type the text to find   1 /1

11/14/2014   Simple Transaction Log   Page 1 of 1

Transaction Date/Time	Consec. #	Identifier	Gross Wt (lb)	Tare Wt (lb)	Net Wt (lb)
10/7/2014 4:10:28PM	238	123	23332	9483	13849
10/7/2014 4:11:12PM	239	456	11700	5096	6604
10/7/2014 4:12:07PM	240	123	13837	6154	7683
10/8/2014 10:41:16AM	241	123	15916	8420	7496
10/8/2014 10:42:11AM	324	789	12485	5880	6605
10/8/2014 10:42:26AM	325	456	11393	8420	2973
10/8/2014 10:42:47AM	326	789	13550	7580	5970
Grand Total:			**102213**	**51033**	**51180**

Page 1 of 1   Main Report   100%

PC Companion by Cardinal Scale Mfg Co

File   View   Actions   Help

ReportList

Simple Transaction Log.rpt
Transactions By ID.rpt

Units lb

Filters:
- ○ No Date Filter
- ○ Last Month
- ○ Current Month
- ○ Current Year
- ○ Custom Dates

From 11/13/2014
To   11/13/2014
☐ ID Filter

Generate Report

Preview

Type the text to find   1 /1

11/14/2014   Transactions By ID   Page 1 of 1

Identifier	Transaction Date/Time	Consec. #	Gross Wt (lb)	Tare Wt (lb)	Net Wt (lb)
123					
	10/7/2014 4:10:28PM	238	23332	9483	13849
	10/7/2014 4:12:07PM	240	13837	6154	7683
	10/8/2014 10:41:16AM	241	15916	8420	7496
			53085	**24057**	**29028**
456					
	10/7/2014 4:11:12PM	239	11700	5096	6604
	10/8/2014 10:42:26AM	325	11393	8420	2973
			23093	**13516**	**9577**
789					
	10/8/2014 10:42:11AM	324	12485	5880	6605
	10/8/2014 10:42:47AM	326	13550	7580	5970
			26035	**13460**	**12575**
Grand Total:			**102213**	**51033**	**51180**

Page 1 of 1   Main Report   100%