**PalmMagic Release 2**

**DevTech Services, LLC**
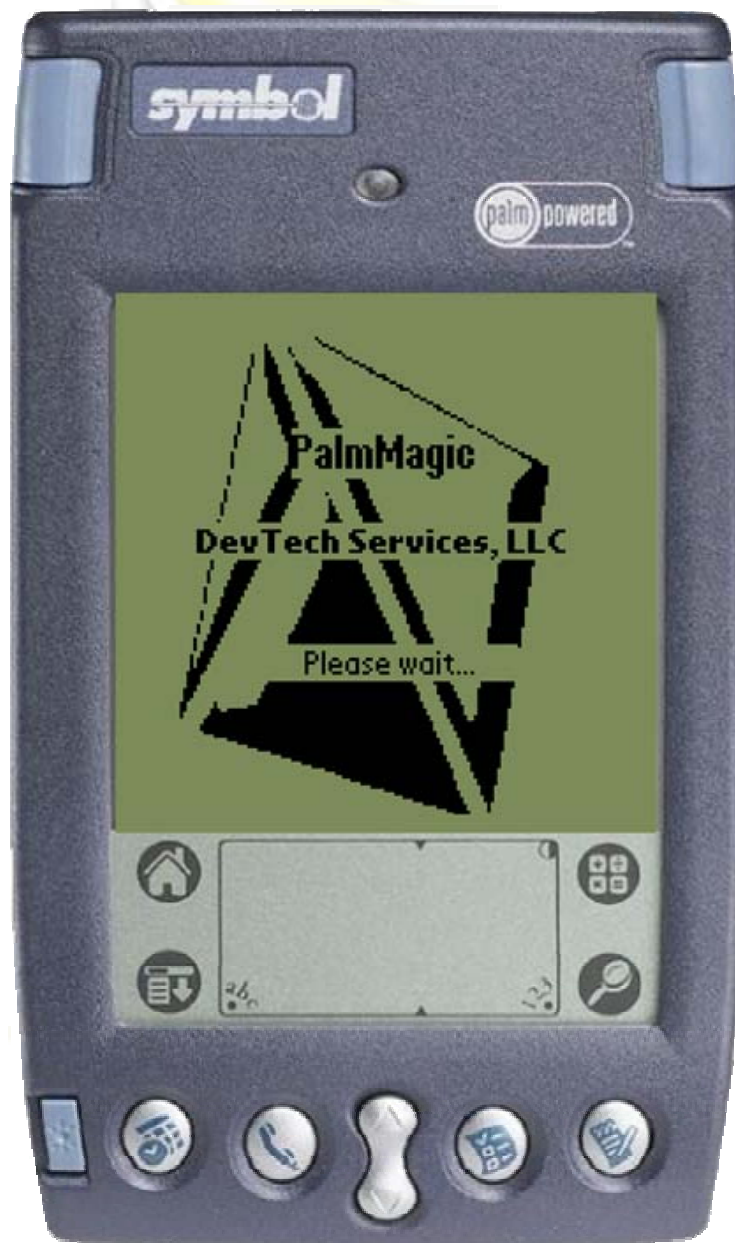
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# Make a Quick Start with PalmMagic

With PalmMagic, DevTech Services, LLC offers Magic users an efficient, intuitive tool for managing Magic data on the go. PalmMagic's user interface allows you to begin working immediately after installation and synchronization. Installation and configuration are a snap, taking less than five minutes for each work station, and twenty minutes for the server installation.
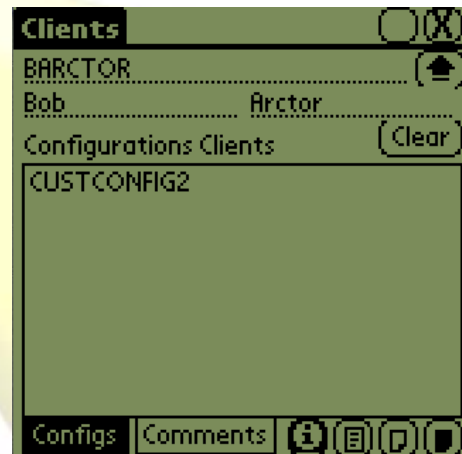
# Managing Data with PalmMagic

PalmMagic release 2 gives you access to a wide range of Magic's available modules, allowing you to perform most of the day-to-day activities you do at your own workstation. From adding client records to managing Incidents to receiving Purchasing Items, accomplish your most common activities on the go.

By using PalmMagic on a laser barcode scanner equipped device, you'll also gain the added benefit of super quick, accurate data entry. Barcode scanning has been estimated to be 10,000 times more accurate and 50 times faster than manual entry. With PalmMagic, you can save time and money when managing Inventory data and be confident that you are accurately tracking your assets from request to retirement.
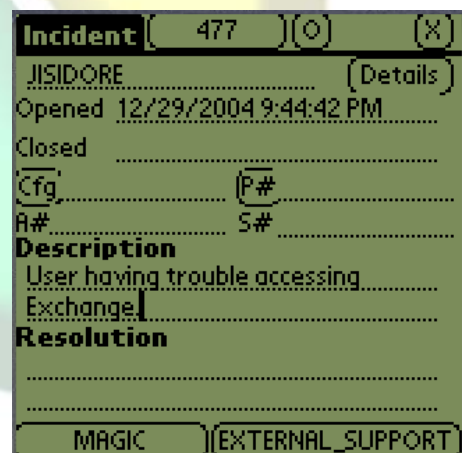
## *Clients*

- Create and view Client records
- Toggle the record between active and inactive
- Add or delete Configurations Clients, the link that joins a client to one or more Configurations
- View, add, and delete Client Comments.
- Drill down to existing or new Configurations

## *Incidents*
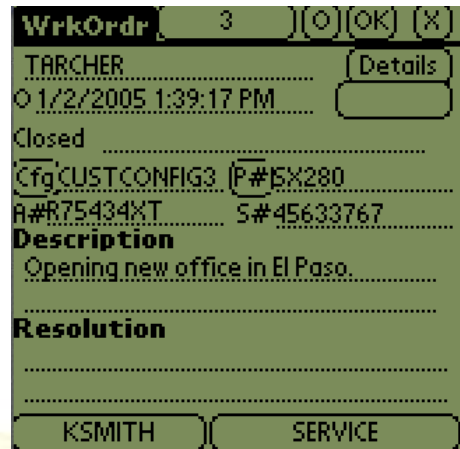
- Update details
- Record new actions
- Change assignments for user and group, or just group
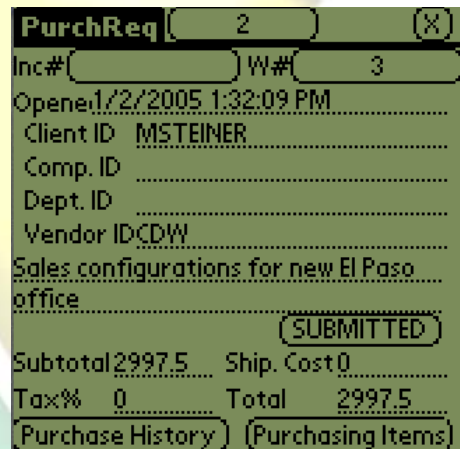- Close and re-open Incidents

## Work Orders

- Closed and re-opened Work Orders
- Re-assign to a user and group or just a group
- Change Configuration or Inventory Item
- View the Work Order's parent Incident if it has one

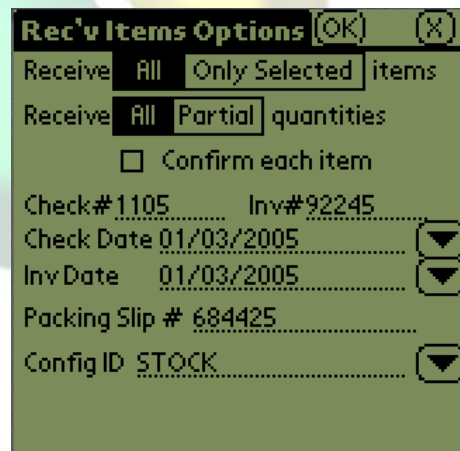## Purchase Requests

- Change the Purchase Request's status
- Add, view, and change Purchase History
- Add, view, change, and receive Purchasing Items
- View the Purchase Requests parent Incident and Work Order

## Receive Purchase Request

- Quickly receive new Inventory Items
- Automatically assign new items to a Configuration
- Enforce Serial # and Asset Tag recording for each item when required

## *Configurations*

- Create new Configurations
- Toggle records active or inactive
- Create or delete Configurations Clients records
- Assign existing Inventory Items to each Configuration.
- Create new Inventory Items and automatically assign them to the current Configuration
- When using a barcode scanning device, scanning an Asset Tag or Serial # will retrieve the Configuration associated with the scanned item

## *Inventory Catalogs*

- Create new Catalogs
- Set rules for enforcing Asset Tag and Serial Number entry
- Create new or delete existing Inventory Items
- View associated Inventory Items, shown by Asset Tag #, Serial #, and Configuration ID
- With a barcode scanning enabled device, PalmMagic will retrieve and display the parent catalog when the Asset Tag or Serial number for an inventory item is scanned.

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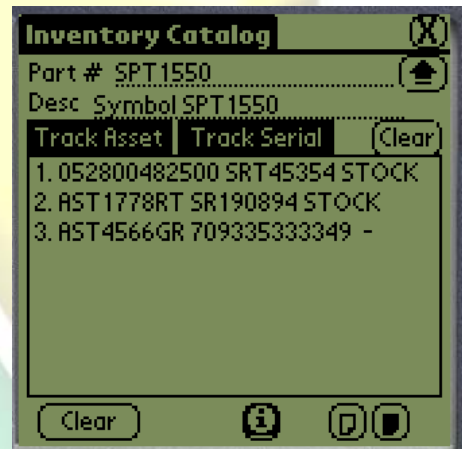
## Inventory Items

The Inventory Item form allows you to create and modify individual Inventory Items. It can be accessed from the main form by clicking the Inventory Items button or by viewing or creating a new list item from the Inventory Catalog or Configurations forms. The Inventory Item form is designed to be the center of activity in PalmMagic, allowing quick receiving of new inventory, data gathering during inventory verification, and easy maintenance of onsite data. When using a Symbol bar code scanning device, PalmMagic can quickly and accurately enter Asset Tag and Serial number data, or look up existing Inventory Item records.
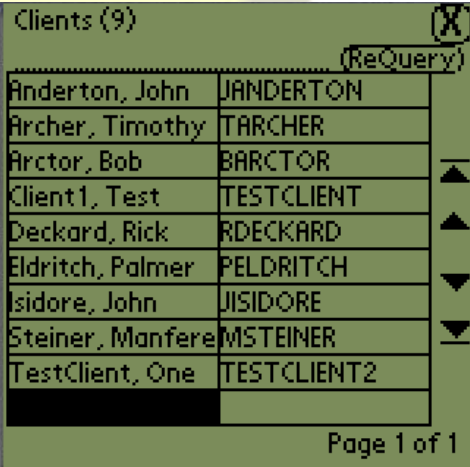
## *Inventory Verification*

PalmMagic Release 2 now includes a tool for verifying and reconciling inventory.  You can notify PalmMagic that you are sending inventory verification data to Magic during the next synchronization.

- While viewing the Inventory Item form, the user scans the Asset Tag or Serial # of an Inventory Item
- PalmMagic looks up and displays the appropriate Inventory Item
- Choose the appropriate Verification value and save the record.  The item can be marked as:
    - Verified
    - Unverified
    - Missing
    - Wrong Location
- When PalmMagic synchronizes inventory item data with Magic, Inventory Service History records are created to reflect the Verification status for each item on the handheld.  The Inventory Service History records can then be used to report on the current and historical disposition of each item.

## *Navigation*

PalmMagic uses pop up grids for choosing from lists of data.  All pop ups have the ability to query on user-defined criteria.  When choosing data for Configurations, Inventory Catalogs, and Inventory Items, Symbol bar code scanning devices can quickly locate related records when a Serial or Asset Tag is associated with data scanned from a bar code.

Button controls allow users to manual page through data, or skip to the beginning or end of the list.  The pop ups also respond to the handhelds up and down buttons for easy one-handed use.

# Installation Requirements

**Server**
Windows 2000 Server with Service Pack 3 or higher
Magic web application version 7.5 or higher
Server should meet at least the minimum hardware and software requirements for the associated Magic web application

**Client**
Windows 2000 with Service Pack 3 or greater
Windows XP with Service Pack 1 or greater
Palm Desktop version 4.0 or higher
HTTP access to the Magic server where the PalmMagic server component is installed

Palm OS based handheld device
      Palm OS version 3.5.2 or higher

A separate build of PalmMagic is available that takes advantage of performance enhancements available in Palm OS 5 ARM-based devices.

For Laser Scanning

      Handspring Visor with optional Symbol CSM150 laser scanner for the Springboard expansion slot

      Symbol SPT1500, SPT1550, SPT1700, SPT1800

**Note:** Laser scanning capability is not required on the Palm device for PalmMagic to function.

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