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Capturx® Pen and Pen Manager User Guide

Version 3.4

Contents

The Digital Pen and Docking Station

The pen looks and feels just like an ordinary ballpoint pen and you use it in the same way. There are no keys to press. You simply activate the pen by removing the cap and deactivate it by replacing the cap.

The docking station is used to dock your pen and to connect your pen to a PC or laptop via the USB port so you can upload data. The docking station consists of the base, insert, and the USB connector you use to connect the docking station to your computer.

To upload the ink using the pen and docking station:

1. You may need to place the ink cartridge in the pen. To place the cartridge in the pen, take one of the ink cartridges and gently slide it into the hole at the tip until it is completely seated and does not fall out. It's normal for the cartridge to have some movement.
2. Attach the docking station to a PC or laptop via the USB port.
3. Fully insert the pen in the docking station.
4. The gold connection points on the pen and docking station need to be aligned and the pen needs to be firmly placed in the docking station.
5. After you connect the USB port to your computer and dock your pen, you will initially need to keep the pen in the docking station for four hours for it to fully charge.

Note: The pen needs to be charged before you can use it to capture data. To prevent your battery from running low, do not leave the cap off the pen for extended periods of time. Keep the pen cap in a safe place.

http://www.adapx.com/support/capturx-pen-manager-digital-pen

Capturx Pen Manager

Capturx Pen Manager is used to manage settings for the pen and to process ink records saved on the pen. Features and options include:

- View the docked and/or locked status of the pen
- Enter and save personal info on the pen
- Assign a password to the pen
- Set as a "Customer Reference Pen" for accessing additional services
- View the remaining time left on the battery of the pen
- Download or delete pages on the pen
- Choose pen download options
- Activate the pen for enterprise enabled applications
- Enable/Disable the Bluetooth feature on the pen
- Register the pen
- Enter an email or server address for sending ink records
- Install additional pattern
- Get updates about new versions of Capturx software

Use the Pen Manager icon to verify pen activity or access the Pen Manager by double-clicking on the icon in your system tray.
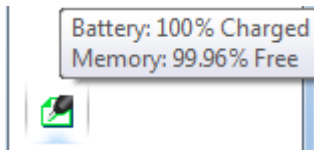
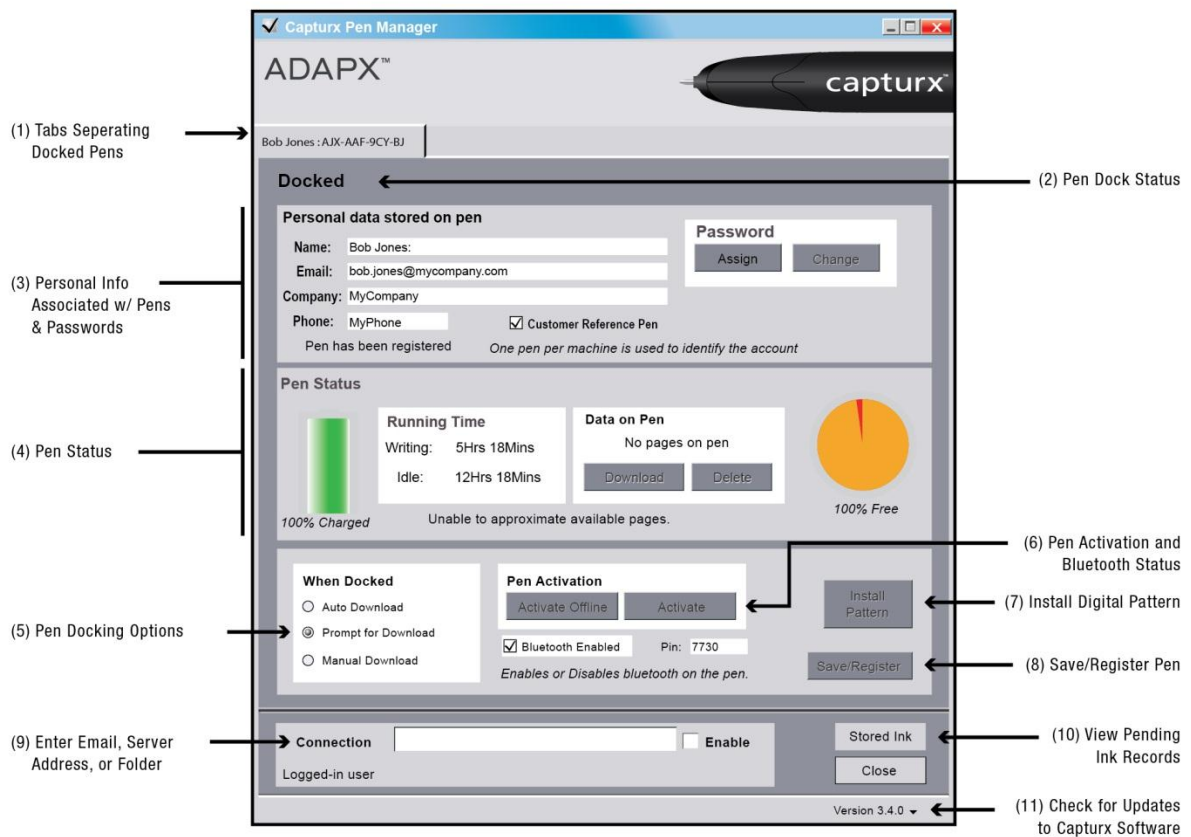Four states of the icon are used to show you status:

	Static Icon	One or more pens are docked
	Animated Icon	One or more pens have unprocessed ink in their memory
	Animated Icon	Pen is processing ink records - either downloading ink records from the pen or importing from an XID file to the personal computer
	Static Icon	One or more pens are locked
	Static Icon	No pens docked

Hovering over the system tray icon with your mouse pointer will provide you with the battery charge information and the memory status of the pen.
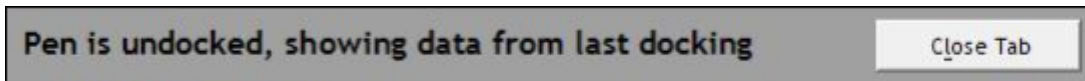
The Capturx Pen Manager includes features that enable the routing of pen data. Each of these is identified by the number in the diagram and chapters below with descriptions:

(1)A Tab For Each Pen
Tabs are used to separate Capturx Pen Manager options for each individual pen that has been docked. Selecting an individual tab will show you the options for that specific digital pen. The "Close" button is used to close the particular tab you have open.

Pen is undocked, showing data from last docking   Close Tab

(2) Pen Docking Status
Pen status tells you if the pen is currently docked or locked (using the password). If the pen is undocked, Capturx Pen Manager will show you the data from the last docking.

(3) Assign Personal Data & Password to Pen
Use this section to assign a password and to assign personal data to the pen. If you registered your pen during the original activation process, the information you entered will appear in the "personal data" section. Enter or change personal data anytime by filling in the desired fields, the updated fields will be used to identify the pen user when uploading pen data.

By assigning a password, you prevent others from using the pen to download data or from viewing the personal information you have entered. Once you assign a password, you will be asked to enter it before you can download data from a docked pen. The password options include:

- Delete Button: Use this button to delete the password on your pen
- Change Button: Use this button to change the password you have previously assigned to the pen

Note: Keep your password in a safe place. If your password is lost, you **cannot** retrieve it and you will need to reset the pen which will result in loss of pen data.

The Customer Reference Pen is used to designate the pen serial number that is sent to Adapx to identify the account used for acquiring additional pattern. You may be asked to supply this serial number when ordering products. Capturx will select the first pen that you dock as your CRP. After docking other pens, you may select them as your CRP.

Pen Status (4)
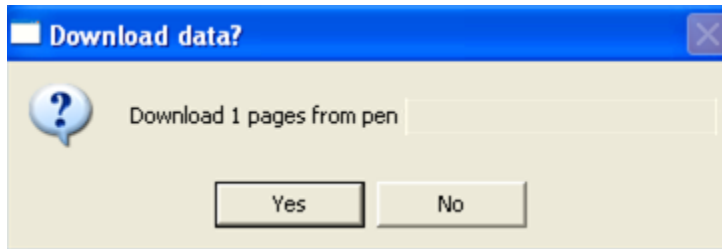This section allows you to view the following information:

- Battery Status: Percent charged, writing time, and idle time left on the pen
- Data on Pen: Percentage of free space left on the pen, pages remaining, and the number of current pages on the pen ready to download. You can also delete and download the current pages on the pen by selecting the desired button.

Pen Docking Options (5)
This section allows you to select a download option for how you want to download your pen data. For example, if you select "Auto download", the data will be auto downloaded. The download options include:

- Auto Download – Data is automatically downloaded as soon as the system detects a docked pen.

- Prompt for Download – When the system detects a docked pen, you are prompted for permission to download the data. For example:

- Manual Download – With the pen docked, the system will wait for you to initiate download using the Download button on the Pen Status section of the Pen Manager.

(6) Pen Activation and Enable Bluetooth

To begin using Capturx products, other than Capturx for Microsoft OneNote, you must have an activated pen. (Typically, your pen will come fully activated from Adapx.) Although activating the pen is part of the initial registration and activation process, you may want to activate additional pens or to activate your pen if you did not do it during the initial registration. You have the choice to activate using an offline key or via the internet. Activate offline by manually entering your software activation key.

The Enable Bluetooth option allows you to use the check box to enable the Bluetooth feature on the pen hardware. Your Bluetooth PIN will also be displayed, so that you can use it to pair your pen with a supported mobile device (for use with Capturx Mobile on that device). When using Bluetooth, see how Capturx works with mobile devices at: http://www.adapx.com/products/capturx-mobile.

(7) Install Pattern

The Install Pattern button is activated when you have a pattern credit on a docked pen. To add more pattern to your local PC, dock the digital pen which has the pattern credit and click the **Install Patern** button.

(8) Save/Register Pen

Selecting the Save/Register button will save the changes you made to the pen and update the pen's registration information sent to Adapx with the information shown in section 3.

(9) Enter Email, Server Address, or Folder

You can send ink records to an email recipient or to a Capturx-enabled Server by entering the mail recipient address or URL in the "Connection" field at the bottom of the Pen Manager and selecting **Enable**. Also, you can save the pen data (XID file) to a folder on your computer network by typing the path into the Connection box and selecting **Enable.** See "How to use the Connection Field" for more details.

(10) View Pending Ink Records

Ink records are available to view in the Capturx Pen Manager prior to being uploaded into the associated file and application. The Stored Ink Dialog can be selected from Capturx Pen Manager. This is also the place to view pen data associated with import errrors.

11) Check for updates to Capturx software

To check if Adapx has released a new version of Capturx Pen Manager, or any other Capturx software, click the arrow next to the version number in the bottom right corner, click **Updates**, and then click **Check for Updates**. At the top of the dialog, you will see the newest versions available. To upgrade, click the New Version number and follow the instructions on the displayed Web page.

How to use the Connection Field

Use the **Connection Field** to send pen data to Capturx-enabled servers or to email ink records to others for processing.

Ink Records routed to Capturx-enabled Server:

1. Enter a URL or site address of the Capturx-enabled Server in the **Connection** field
2. Select **Enable**

Records written on forms printed from the Capturx-enabled Server will be processed and remaining ink records on the pen will then be processed on the local machine.
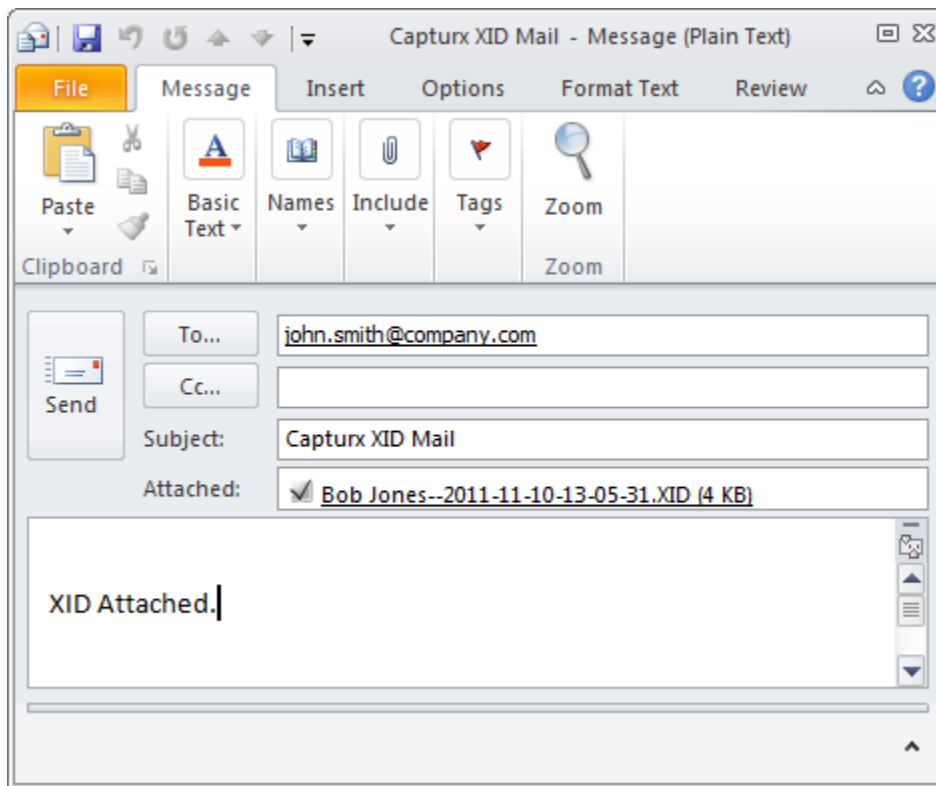
Ink Records routed to other Capturx installations via email:

1. Enter an email address formatted as *name@domain.com* in the **Connection** field and select **Enable**.
2. Dock the pen once the data is collected
3. Capturx will create an email using your default email client with the sender being whatever email address is entered into the **Connection** field. The ink records will be contained in an XID file (Adapx Ink Document) attached to the email.

When routing digital ink, an XID file will be created once the pen is docked – all data stored on the pen will be saved in this XID file.

Each XID file will be named with the following:
   a. Pen Author, date and time of the file upload

You can also use the **Connection Field to** save the pen data (XID file) to a location on your computer network by typing the path into the Connection box and selecting **Enable.**

Capturx Enabled XID Files

Opening XID files:

In order for the email recipient to open the XID file, the recipient must have Capturx Pen Manager 3.0 or later installed, a well as the corresponding Capturx application for each printout upon which digital ink was written.
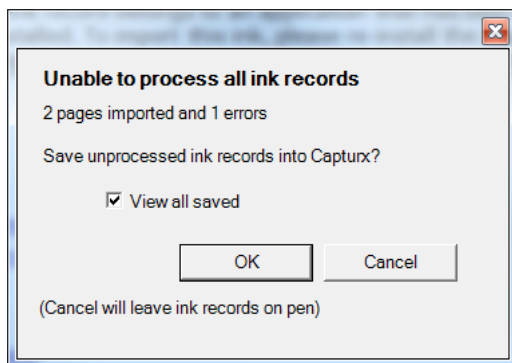
1. Double click on the XID file named with the appropriate date/time, author
2. Capturx Pen Manager will process the ink and make it available to the appropriate Capturx application.

For either kind of XID, successful processing of Ink Records will be reported by Capturx Pen Manager after processing.

Unsuccessful processing of Ink Records will result in a "Failure" message. Failures are generally explained by the following conditions and can be rectified with the accompanying actions:
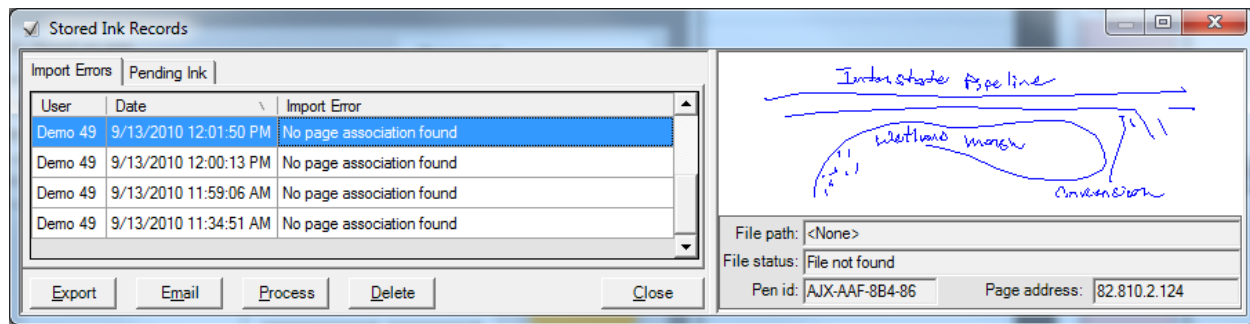
If an error has occurred while processing an ink record from and XID file, the following dialog will appear.

If Ink records cannot be processed a preview of each unprocessed record is available to view in the Stored Ink Records dialog on the "**Import Errors**" tab.

Each record will show:

- Ink Record displayed on the right side of the dialog
- Pen User Name
- Date and time record was downloaded
- Pen Serial Number
- Error message

Stored Ink Records

Ink records are available to view from **Stored Ink** within Capturx Pen Manager — prior to the ink being processed by the associated file or when an error occurs when attempting to process ink records.

Stored Ink can be selected from Capturx Pen Manager or by selecting "OK" from the error dialog when ink records cannot be processed.

Users can view stored ink records in two ways:

    a. Pending ink; prior to sending the ink record to the associated file.
    b. If an error has occurred processing the ink from the pen.
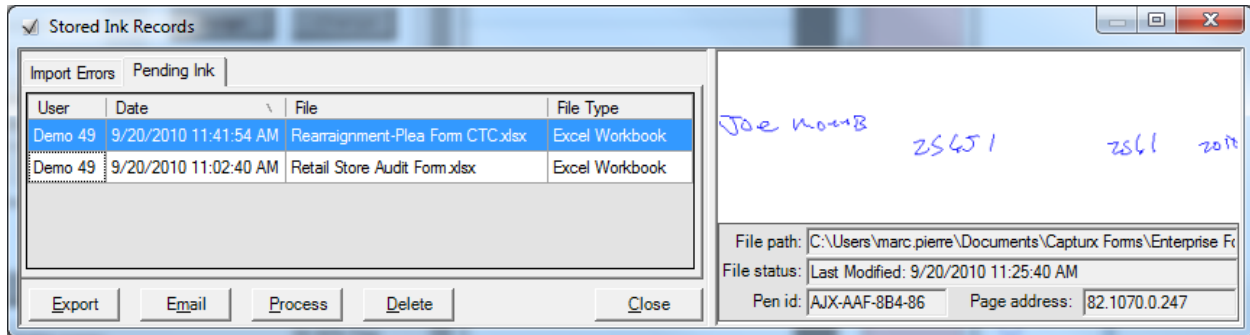
Pending Ink Tab

Ink records which can be viewed in the **Pending Ink** tab:

- Ink is successfully downloaded by docking the digital pen or clicking on an XID file, but no Capturx application has tried to process the ink record.

Each record will show:

- Ink Record displayed on the right side of the dialog
- Pen User Name
- Date and time record was downloaded
- Pen Serial Number
- File Name
- File Type

Note: OneNote ink records will be processed automatically and cannot be previewed
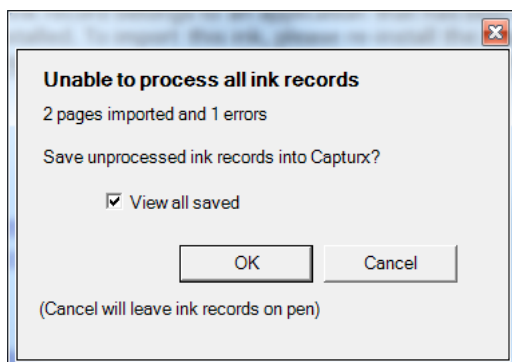

When a pending ink record has been previewed options include:

- **Export:** Select to save ink record as Capturx XID file to disk that can be processed with the associated file

- **Process:** Select to send the ink record to the associated file for processing once the error has been resolved.
  Notes: Processing an ink record for any PDF file will cause all pending PDF ink to be processed.
  Ink records for ArcGIS must be processed from within ArcGIS.

- **Email:** Select to save ink record as a Capturx XID file and send via email to a user with the appropriate destination file

- **Delete:** Select to delete the ink record from the digital pen
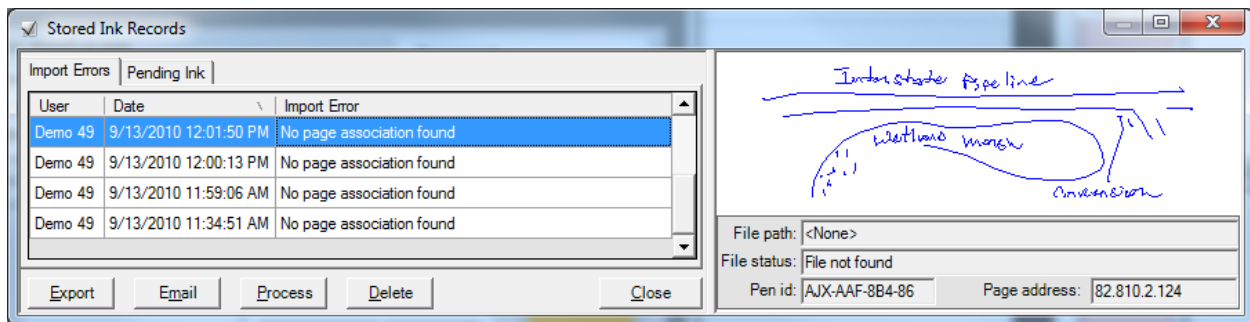
Import Errors Tab

If an error has occurred downloading ink from the pen the following dialog will appear.

If Ink records cannot be processed, a preview of each unprocessed record is available to view in the Stored Ink Records dialog on the **Import Errors** tab.

Each record will show:

- Ink Record displayed on the right side of the dialog
- Pen User Name
- Date and time record was downloaded
- Pen Serial Number
- Error message

Ink records that have received an error message can be previewed with options to:

- **Export:** Select to save ink record as Capturx XID file to disk that can be processed with the associated file
- **Process:** Select to send the ink record to the associated file for processing
- **Email:** Select to save ink record as a Capturx XID file and send via email to a user with the appropriate destination file
- **Delete:** Select to delete the ink record