Anthology, Inc.

OPN2001 Rental Scanner and Visual Anthology Physical Inventory

Overview:

The OPN2001 series data collectors are small, lightweight, portable barcode scanners to use in collecting for your physical inventory. The data is then 'downloaded' into Anthology via the Physical Inventory module. These scanners are not programmable.

The Physical Inventory module in Anthology was designed so that you can scan several batches of books and save each one independently. This allows you to grab the data from a scanner and save it off so you can focus on correcting the batch later on. This way you can have several staff members using scanners, each dumping their scans and moving off to the next batch while one person continues to work on reviewing the batches on the computer.

Once you receive these rental scanners, please fill out and fax back the rental agreement immediately. You have these scanners for a pre-determined number of days from the time that you receive them.

You should already be using Visual Anthology version 7.4.133 or higher to use the PI module and these scanners and have watched the PI training videos available on the Customer Zone. Additional individual store training can be purchased at the discounted rate of $75/hour. Please note that weekend or after hours pager support is not available for Physical Inventory.

For more detailed information on the scanner download the document titled "PI OPN-2001 USB pocket scanner User Manual" from the Customer Zone.

Connecting the OPN2001 Scanners

A few days in advance to the inventory count, decide which machine will be the 'central command' station during the PI. We recommend connecting and preparing the scanners for inventory   This may be the main cash register or any other machine that is in a convenient location for all the runners to reach. This machine will have the one and only scanner cable connected to it. There should only be one person using the PI module at the central station, no others may use the PI at the same time.

The OPN2001 scanner comes with a standard USB data connection cable that connects between the computer and the scanner (mini connector).

1. If you have a Palm device docking unit, a Pole Display, or any other serial based device that is connected to COM1 already, shut down the machine, disconnect the device, then power the station back on. This should allow the computer to recognize the device is no longer connected.

2. Plug the USB end into the computer and allow a few moments for the computer to recognize new hardware. You may receive a message saying that "New Hardware" or "New USB Controller" was found. Shortly after a new window should appear. Follow the images below to set the correct options and install the necessary driver.

Note for CLOUD users: If you are a Visual Anthology Cloud user, be sure to have the scanner and cable connected to the computer before you launch your RDP icon. You may also need to right-click and Edit your RDP icon. The "Local Resources" tab needs to have the "Local Devices and Resources" set to allow "Ports", "Other Supported Plug and Play (PnP) Devices", as well as "Other Supported RemoteFX USB Devices". Be sure to Save your setting changes from the General tab before connecting.
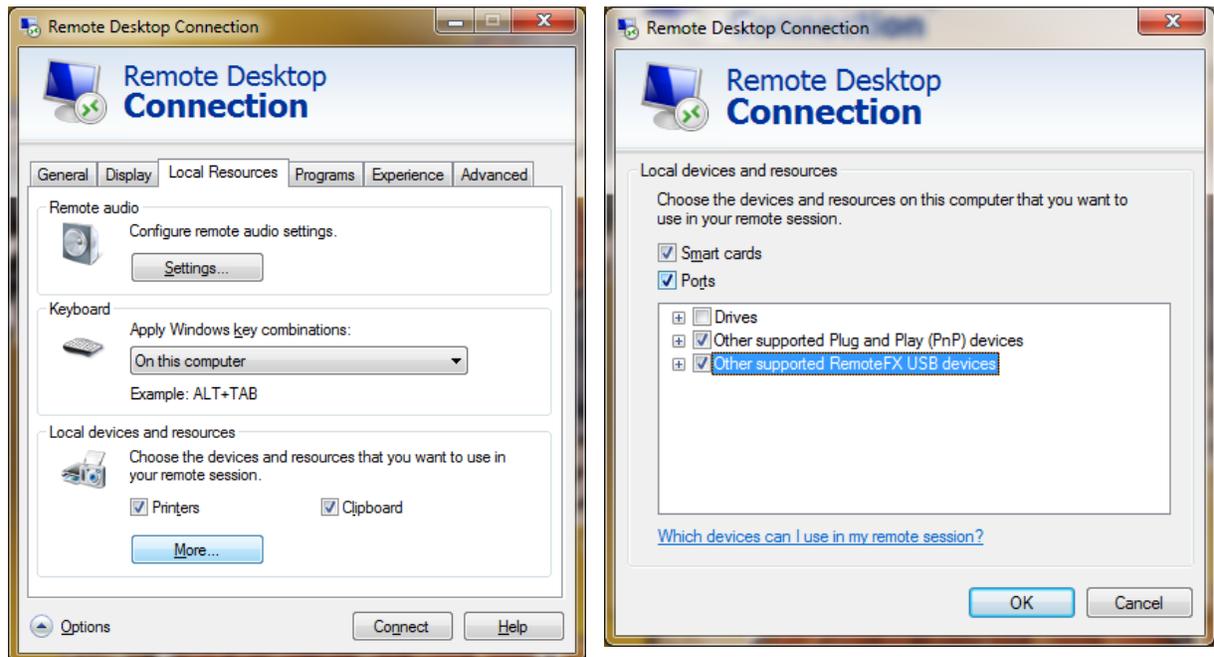
Activating the PI Scanning License

By now you should have received an email from Tech Support containing an "Authorization code". Use the steps in the email or the steps below to enable the scanner download function.

1) Open Visual Anthology, on any machine

2) Go to Inventory Control | Physical Inventory

3) Click on the Actions menu | Specify Scanner.

4) Please choose the scanner model "Symbol CS1504". This is the

same type of scanner as the OPN2001 you will be using.

5) Go back to the Actions menu | Enter/Review License for Scanning.

6) Paste in this authorization code, exactly as noted from the email. This is usually an 18 character

string of numbers and letters that is case sensitive. Click F12 Post to save.
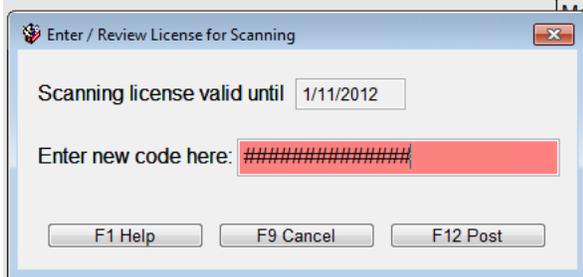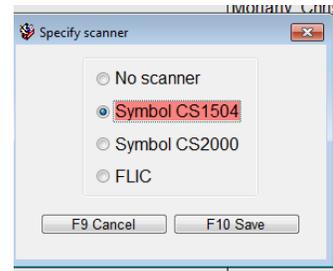
7) This authorization code will allow you to use the rental scanners for a set number of days. You will be shown the date your scanning license is valid to.

8) Repeat these same steps with your Test Copy, if you've created one to practice with before the real PI.

Installing OPN2001 driver

If the machine the scanner is connected to is a Windows 7 machine the scanner is typically recognized automatically by Windows Updates. If you are using a Windows XP machine or if the scanner does not appear to be recognized it may be necessary to install the OPN2001 driver first.

Log onto the Customer Zone and go to the Downloads page. Under the "Other Downloads" area you will find the "USB Drivers Installer.exe". Download to desktop (do not Run first), double click the exe and click OK through messages. A good install will show this final message:
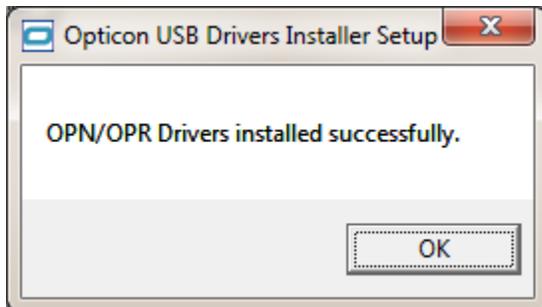
Quick Steps for PI

Below is a brief list of steps to get you started on a PI. The document listed above is CRITICAL to doing a proper and correct PI.   You will need information from that document to make appropriate decisions. The rest of this document has more detailed information you must review before starting the PI.

1. For record keeping, print/save an Inventory Status report before you start the PI. Use this pre-inventory report to compare against a post-inventory report to show the total $ of discrepancies.

2. Create new PI record on the morning of the PI.   Inventory Control | Physical Inventory | F4 New.

3. Choose whether you will be doing a Full or a Partial PI, do not use the "Edit By Exception" option during the PI Wizard for these any PI that you'll be using scanners/collectors.

4. Complete the wizard. Allow system a few moments to finish building the PI

5. Once created, immediately F10 to Save the Master PI record. This record will always have a status of Open until you complete the PI.

6. Scan titles, connect cable to scanner, go to the Master PI record, go to Actions, and choose "Get Data from Scanner". Wait until scanner is finished beeping and flashing before removing now empty scanner from the cable. With larger batches there will be longer delays between beeps.

7. The newly downloaded batch will be shown on the List tab of the PI with a batch number and a Status of "Scan". Select this record and go to the Details tab

8. You can print this batch to use in locating any titles that were mis-scanned or are problematic. Once the review is complete, use the "F6 Consolidate Quantities" and F10 Save before editing the batch further.

9. You can sort the scanned batch by ISBN, Title, etc. to locate any items needing attention. If an item has a blank title the scanned barcode was not recognized. Either a 12 digit UPC code was mistakenly scanned instead of the EAN/ISBN barcode, the barcode was damaged, or the item does not already exist in the system.

10. If the scanned barcode is a valid 10 digit or 13 digit ISBN use Alt+F5 to attempt fetching the item. Otherwise delete any bad items using the F7 Delete Line option.

11. Post the completed batch record to update the "CountQty" on the Master PI record. The scan batch record will now have a status of "Update".

12. Every so often return to the Master PI record (Open Status) and summarize the batch quantities added to it. Scan batches that were posted had their qty's added to the CountQty in the master PI. Doing an "F12 Post Update" in the master PI will add the CountQty values to the TotalCount column and will create a batch record with the status of "Manual" as an audit trail for you later.

13. Every few hours save your work, and close out of the PI. Go to the Tools menu and run a quickbackup, then Reindex. This will give you restore points in case of a serious problem with your network or hardware or if you later realize there were items miscounted.

14. Towards the end use the Master PI and the Stock Check reports with your hand counts to note any non-scannable items. Be sure to post those updates.

15. Before finalizing the total count run an exception report or sort by the Discrepancy column to find any items potentially missed.

16. When you are satisfied with the count, run a fresh quickbackup, reindex. You must do one more summarize of quantities on the Master PI by using the "F12 Post Update" or the Alt+F12 button will not be available. Finalize your changes by using the "Alt+F12 Adjust Inventory" option. Be patient as the current OnHand amount will be replaced by the Total Count value for every single item included in the PI. Do not interrupt this process. When it is finished you will see the Master PI record has a Status of Complete.

DOs and DONTs. Tips for Troubleshooting

- You must be on 7.4.133 or higher for the PI

- These scanners are re-chargeable via their USB data cable. Opticon recommends charging each scanner up to 2.5 hours prior to use for best results. The LED will change from red to green once fully charged.

- If you utilize 'fetch', verify it is working properly before uploading the data collector.

- Every inventory item should have a Department and a Section before starting the PI. Please refer to the document titled "PI PI Physical Inventory Overview" for more detail found on the Customer Zone under Documents. Also view the Video Trainers found on the Customer Zone as well.

- If you will be doing a Partial PI, consider restricting each Master PI record to one section. If you must do multiple sections per batch, be sure to not to double up on the same section. IE, do not attempt to include the same section in PI #3 and in PI#6. Posting PI # 6 after #3 will mean that any changes done to those inventory items from #3 will be completely overwritten with the values from #6.

- Towards the end of the inventory count process, before the final Alt+F12 Adjust Inventory option has been used the Total Qty values can be adjusted by changing the Count Qty. If the TotalCount value needs to be lower set the Count Qty to a negative value.

- To keep track of what area of the store has been scanned you can record a note in the "Update Note" field before downloading the scanner batch.

- When connecting the scanner to the cable, make sure you have the cable firmly seated. For proper download, always connect the collector to the cable first before selecting "Get Download".

- If you have problem downloading a batch from any scanner, disconnect the scanner, close out of anthology, wait one minute and try again. If the problem persists shut down the computer for 5 full minutes and retry the download.

- To scan a barcode with the scanner, just press the large button marked with a (+) sign. A green light should appear along with the red laser light. An audible beep will be heard with a successful scan. If you make a mistake, like doing a double scan, you can delete the last scanned item. Press the small button marked with a (-) and rescan the item. A beep will sound and the scanner will flash yellow.

- Be sure to scan the correct barcode. Many trade paperback books have two different barcodes printed on them. The correct one to scan for books is called an EAN13 barcode which starts with 978, sometimes located on the inside front cover. Please read the help system section entitled Special Topics | Understanding Barcodes. To avoid heartburn, review proper barcodes with everyone assisting during the inventory.

- Once you have gotten the scanner connected and working it is best to hold off on installing any new software, printers, hardware, etc. until the entire PI has completed. In some cases installing a new printer can create a conflict with IRQ/COM port settings the scanner may be using.

- DO NOT pull scanner from base too fast when it is downloading the cable as soon as titles are downloaded to the PI screen. Wait till it stops flashing and beeping. If the scanner is pulled too soon, the scanner is not emptied and you may lose data collected.

- If you have hit the limit the scanner will emit a high and then low beep and no laser light will appear. You can hit the (-) to scan the last item to remove it from the scanner. We recommend keeping batches to 150-300, typically one standing bookshelf unit, to reduce risk of data loss.

  - 1. You should shut down the entire system and wait for 5 minutes before turning it back on. Start Anthology and do a Rebuild Keywords, Reindex and a Quickbackup.

- - 2. If it has been more than 3-5 hours since the last battery change, change them now on the problem scanner (the last attempted upload).

  - 3. Clear that scanner (hold – button for 20 seconds).

  - 4. Try a small test scan first with 3-4 items to ensure the scanner/PC is in working order before uploading a full load.

- For smooth operation, save the PI periodically, close Anthology and restart Windows.

- You may wish to perform the manual clear on the scanner after pulling from the cable by holding the small button marked with (-) for 20 seconds. Doing this with every batch will use up the batteries so we do not recommend doing that frequently.

- If the scanner does not respond after changing the batteries then try the manual clear.

Frequently Asked Questions:

Q: How many barcodes will the scanner hold?

- The OPN2001 scanners can hold more than 1,000 barcodes. However, it is best to work with smaller batches to minimize the risk of error or data loss. Most stores scan 150-300 items per batch, roughly one standing bookshelf unit.

Q: How do I know the collector is full?

- The scanner will emit a "High-Low" beep when it is getting full. A different signal will emit when the batteries are getting low.

Q: What do I need to know about a partial PI?

- If you will be doing a Partial PI, consider restricting each Master PI record to one section. If you must do multiple sections per batch, be sure not to reselect the same section twice,   i.e. do not attempt to include the same section in PI #3 and in PI#6. Posting PI # 6 after #3 will mean that any changes done to those inventory items from #3 will be completely overwritten with the values from #6.

Q: My store must be open during this PI, what should we know about this?

- Anthology does not support or recommend doing PI during open hours. Know that most stores that attempt a PI during open hours, usually decide against this for the next PI as they find that doing a PI while open is too complex and time consuming to be cost effective or accurate.   If you absolutely must be open, you will need to take great care in the counts, it will be difficult to know if a title was moved before or after a section was counted.

- **DO NOT attempt to change the CountQty or TotCount value on the Master PI to adjust for sales**. This is the most repeated mistake of any PI done while the store is open. The PI will be REPLACING the Inventory OH value with the TotCount value. It is best to complete the PI and then later run a Sales History report for items sold during the counts. Recount or spot-check items sold during the inventory. Make any corrections by going to Master Files | Inventory and using F6 Edit OnHand to make corrections.

Q: When choosing my list of sections for my Partial PI I missed a section. Can I go back in and add the missing section?

- If you miss a section in a partial PI, but end up scanning and downloading those items in a batch, you will be forced to remove the items from the batch before they can be posted. Only items assigned to the sections listed in the PI record will be accepted. You can simply create a new PI with the missed section only. Do not create a new partial PI that has a section already selected in a previous PI created during this physical inventory as the first PI counts for that section will be completely overwritten with the counts for the partial PI posted later.

Q: I included a section on the PI, but that section of items was missed in the scanning. What happened to the Inventory OH's when the PI was posted?

- If you have missed a physical section, yet had the section on the PI, your total counts will be 0 when you post the final change. When you do the final update (Adjust Inventory) any item with a value in the Discrepancy column will have the OnHand changed by that value. For example, an item has 10 OH in the system at the start of a PI. The store only counts 8 copies. The Discrepancy is –2. The OH will have 2 copies subtracted to change it to the correct 8 copies found and an entry will be made in the OH Edit report for later reporting if needed. Be sure to run an exception report to spot any missed sections before finalizing the PI.

Q: I have several items that do not have barcodes on them, mostly sideline items. How should I handle these?

- For non-barcoded items you can still count them and include the counts on the Master PI record. Simply go to the Master PI record, again this is the only record that will have a Status of OPEN. This process is called a 'Manual Update". Sort the Master PI record by the section or title, or you can use the F8 Find Line key to locate the item by it's sku. Once you have the item located, modify the "CountQty" field for the amount just counted. Pay close attention to the "TotalCount" field in the grid as well. This TotalCount is the sum of all the batches done so far, the CountQty value gets added to the TotalCount each time you F12 Update the Master PI. Understand further that a batch record with the status of "Manual Update" will be created as a record. Do not confuse this with your downloaded and posted batches.

Q: What if I left the scanner connected for a long time after upload?

- If the scanner is not responsive, close the PI, and Anthology. Try manually clearing the scanner and testing with just a couple of items. You may also need to shut down the computer for 1 minute.

Q: My scanner doesn't want to read/accept barcodes.

- First check the scanner for full charge. Connect it to the computer, while charging the LED light will be red. When the scanner is fully charged the LED will turn green.

- If the scanner still does not respond, clear the scanner by holding the (-) for at least 6 seconds and aim away from any barcode.

- Next locate a book with the EAN barcode (978…) on the back and attempt to scan that item first. If successful then the other item being scanned may have a damaged barcode, or one that is too small to read. Try different angles and distances away from the barcode being scanned.

- In some cases the audible tone on the scanner may have been turned off. Hold down the (+) button for at least 10 seconds. The scanner will beep audibly when the sound is enabled.

Q: I've done a Get Data command and get a message saying "No Data to Download".

- The scanner may not be completely connected, or the scanner was manually cleared. First attempt to check the connections, close the program and reopen, and then try another get command.

Q: After shutting down the program, checking the cable connections, I still get an error saying I cannot download the data from the scanner. I have tried repeatedly with different scanners and am unable to download any scanners.

- First, stop all scanning. Close out of Anthology, disconnect the scanner from the cable, and shut down the PI machine for 5 full minutes.

- Bring the system back up and do a Quickbackup, and a Reindex from the tools menu.

- Pick one scanner and empty it by holding the (-) for 20 seconds until it beeps. Scan only 2-3 items as a test. Do not attempt to download other scanners at this time, concentrate only on this one scanner and getting the communications functioning again.

- If you still experience problems you may need to try a different scanner or a different machine. In rare cases the cable could be damaged, you should have received a backup cable to try. Know that the USB driver will need to be reinstalled if the scanner cable is moved to a different USB port or different computer.

Q: What if I followed all the troubleshooting tips and I still can not upload?

- Shut down computers and move the cable connection to another computer.

- As an absolute last resort, if after following the above directions you still have problems downloading batches, stores on support may page. Please be aware that techs are instructed to offer only 5-10 minutes assistance, but we cannot guaranty the issue can be resolved on an emergency page basis. Some problems may only be resolved by a login M-F, 9-5pm eastern.

- Please be aware that if you page, the tech on call will ask you to go through the same troubleshooting procedures listed here. When the scanner malfunctions, there is very little a tech can do remotely.

Q: What if I have problems posting a batch after hours?

- Note the problem batch number, do not post it. Continue with other scanning but do not complete the PI. You can safely hold off on completing the PI even if the store must open and do sales the next day. Email Support@anthology.com with the information and a tech will contact you the next business day.

  Please be aware that if you page, the tech on call will ask you to go through the same troubleshooting procedures listed here.