Physical Inventory

2-4 weeks prior to PI	**Plan scanning your inventory using Physical Inventory**	Scanning your inventory using Physical Inventory in Anthology is like a doing any physical inventory, organization is the key to success. Consider cleaning up inventory on your floor by resorting and re-shelving inventory that may be in the wrong place. Consider identifying your shelving units and your shelves. You can use these descriptions to help keep you organized and later to locate items.

Plan to clean up inventory (departments, sections, etc.) in Anthology. **We urge you to ensure every single item in the inventory has a Department and a Section.**

Preplan the number of scanner batches you will do. The CS2000/CS1504 scanners hold 150 scans per batch. Figure out unit by unit how many batches it will take to complete. Once you have test how long it takes to scan one batch, you will have an approximate time it will take to complete the Inventory. Expect scanning your inventory to take several days to a week to complete.

You can not sell your inventory while you are counting it. Decide whether you will do a Full or a Partial Physical Inventory. We recommend that you do a Full Physical Inventory and close the store for those days to scan all inventories. If you can not close your store, consider a partial PI - scanning one section at a time while you are open. Decide what order you will scan your items. Decide how you will handle items that are scanned but not in your DBOB.

Many stores initially decide to have the store open during the first PI. Most of these stores later decide to close the store during the PI process.

Organize extra help for that time period. Consider 1 helper for every person scanning. If this is not possible, consider at least 1 helper overall.

	Completely Read PI documentation	It is very important you take the time to thoroughly read the PI documentation. Make use of the Yahoo Users group to talk to other users that have done a PI. This can be found at http://groups.yahoo.com/group/VisualAnthology

It is up to you to completely read the documentation and familiarize yourself with the module. All the information you will need is found in this document. Training on PI is billable at $125 an hour and must be scheduled in advance.

	Upgrade Anthology & Demo	The main copy of Anthology and the training copy that you will be using MUST be on at least 5.9.004. You are responsible for downloading this upgrade from the anthology website and running it on your system. Go to www.anthology.com and click on the downloads link.

1-2 weeks before PI	**Prepare training copy of Anthology**	You will likely want to practice with a test copy of your data before beginning the PI process. If you don't have an Evaluation or Hands On Anthology copy, call Anthology to get one.

Install the training copy on a computer that you can practice doing your Physical Inventory on.

Do a quick backup of your live data and extract it into the training version. We have a document on this, contact for more information.

	Prepare Anthology Data	Know that all receiving must stop during the PI. Start planning now what inventory needs to be received before the PI.

Consider moving old inventory out by returning books to vendors. You can manually create a Return Invoice or let Anthology help you by generating Overstock Returns.

Clean up your inventory (departments, sections, etc.) in Anthology. It will help to keep you organized and help you to run a smoother and more efficient PI. Use Reassign to assist the

process.

Decide if either the Stock Check or the Inventory Status report will be beneficial to your plan.

	Prepare inventory on your floor	You should know whether you are doing a Full or a Partial Physical Inventory by now. Begin to prepare the appropriate areas.
		If you are going to clean up inventory on your floor begin now. Identify your shelving units and your shelves. Some Booksellers have created a store map and mapped out the batches.
		Resort and re-shelf inventory that may be in the wrong place. If you are returning inventory to vendors start boxing them. Any inventory that has been received in Anthology needs to put out on the shelf.
	Purchase any additional training and schedule	Rental of the scanners does not automatically include PI training. Additional training should be purchased, scheduled, and completed the Friday before doing the PI. Weekend pager calls cannot answer "How To" questions on PI.
		You can purchase an hour of training at $125 ahead of time to have the tech provide detailed training.
2-3 days before PI Starts	**Receive Scanners**	You will most likely be receiving the scanners today or tomorrow. Once you receive them, fill out and fax back the Rental Agreement form. The clock starts now, you have 7 days to complete the PI and return the scanners.
		IMPORTANT! Many other customers are also waiting for these scanners. Even if you do not complete the PI, do not hold onto the scanners. Contact us immediately if you feel you will need the scanners longer. An extension may or may not be granted.
1-2 days before PI starts	**Connect scanners, Enter Authorization License, test Scanners**	You are responsible for following the document provided by Tech Support. Use the document titled "Connecting the CS2000/CS1504 Scanners" to connect and test the scanners.
		You should connect the scanners to the machine that will be the central station during the PI. This is the machine where all of the runners will drop off their full scanners to for downloading. Consider making this a machine that is easily accessible and central to the store. Most stores use the main cash register.
		You should have received an email from Tech Support by now that contains and "Authorization" code. This code must be entered into Anthology to enable the scanner downloads. Simply follow the instructions provided in the email. If you have not already received the code, please contact Support@anthology.com.
		Use the document titled "PI Setting up Test copy of data for PI Practice(QuickBackup).doc" to create a test set of data using your own data set to practice with.
1 day before PI	**CRITICAL TIP**	Once the scanners have been tested, do not install anything new on that computer, particularly printers, palm pilots, or display poles for the duration of the PI.
	Complete Optional PI Training	Rental of the scanners does not automatically include PI training. Additional training should be purchased, scheduled, and completed the Friday before doing the PI. Weekend pager calls cannot answer "How To" questions on PI.
		You can purchase an hour of training at $125 ahead of time to have the tech provide detailed training.

	Review PI Documents	Review the documents on using Physical Inventory again. Use the demp/practice copy of Anthology to practice scanning and downloading batches. Practice, practice, practice scanning EAN-13 barcodes! Experience has taught us that correctly identifying and scanning EAN-13 is a problem for most booksellers, even experienced ones.

Booksellers report problems with scanning UPC codes, double scanning the EAN-13 and scanning both the UPC and EAN-13 at the same time. EAN-13's start with a 978 and can be on the inside front cover of a book. Keep the scanner close to the book using a single stroke. Use your thumb to cover a vertical portion of the UPC code.

Did we mention that it is a good idea to practice scanning? Download the scans into a practice PI in Hands on Anthology. Check our help system for pictures of different barcodes under Help \| Contents \| Special Topics \| Understanding Barcodes. |
| **Start PI** | **Scan your inventory** | If you haven't started to scan your data, we strongly suggest you start now. Make sure that your staff knows they can not perform their usual job functions in receiving. These job functions should be suspended until after the Physical Inventory is complete.

Remember to do a backup once a day and reindex once, if not several times a day.

IMPORTANT! Change the batteries every three to four hours and clear the buffer before every new batch. If you have problems, shut off your computer properly, leave off for 30 seconds or more and then turn back on.

If you are scanning your inventory during the weekend, remember that there is no tech support over the weekend. Follow the Troubleshooting Document. Problems that can't be resolved through the documentation will need to wait until Monday. |
| | **Prepare to complete the Physical Inventory** | Double check your work by running an Exception report. Verify the exceptions listed on the report either by going through each item or by doing spot checks. |
| | **Complete PI** | Follow the instructions in the PI document for more specific information.   Once you are sure your Physical Inventory is correct; do a quick backup, reindex and then post the update (F12) on the open PI to finalize the Physical Inventory. |
| | **Return Scanners to Anthology** | Return scanner to Anthology. Use a shipping service that can track the package if it gets lost. Call us with the tracking number. Please use the original shipping containers.

You have rented the scanners for 7 business days, this starts on the day receive the scanners. |