Anthology, Inc.

CS1504 Data Collector and Visual Anthology Physical Inventory

Overview:

The CS1504 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.

NOTE: You will need to purchase batteries to be used with the scanners. While we may provide one set to get you started, you will need more. Symbol recommends using 4 Energizer EPX76 batteries in each scanner for optimal performance. They further state that a brand new set of 4 batteries per scanner will do roughly 5,000 scans. These are also sold under the models 357/303, A76, AG13, LR1154, LR44, or SR44SW/W. You will need a small crosshead/Phillips screwdriver to change the batteries. We recommend using an eyeglass repair kit screwdriver. There is a single screw near the bottom end of the scanner. Be VERY careful putting in the batteries. The two batteries on the left should be printed side up, and the two batteries on the right should be printed side down. Putting in the batteries incorrectly could seriously damage the scanner.

Connecting the CS1504 Scanners

Decide which machine will be the 'central command' station during the PI. 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 CS1504 scanner comes with a standard Serial connection cable that connects between the computer and the scanner (mini connector). Additionally a USB to Serial adaptor is available. Anthology has decided to support the USB to Serial (with adaptor) combination only.

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. Verify the USB adaptor is firmly attached to the Serial connector. The male and female serial connectors can be screwed together for stability.

3. 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.

#1- Select "No, Not this time", click Next

#2- Select "Install from a list or specific location"
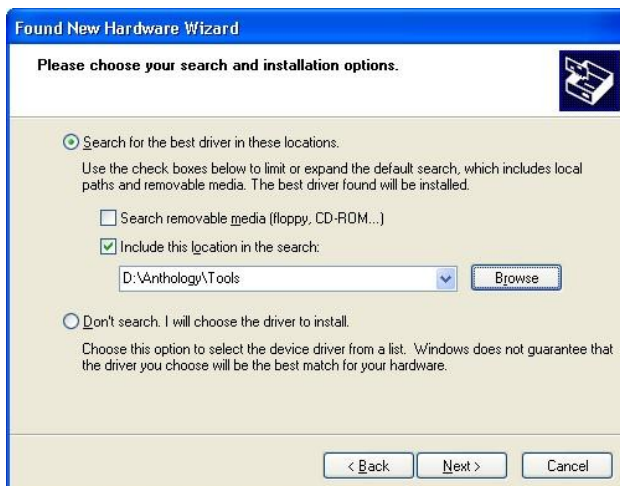
#3- Select "Include this Location in the Search"
Click Browse button and browse to the location of your Anthology folder on the server. Browse down to the "Tools" folder contained in the Anthology folder.

#4- Completion message upon successful driver installation.
Click Finish.

This folder contains the drivers necessary. Click Next.

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) Select the CS1504 scanner and Save
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.
7) Save settings. This authorization code will allow you to use the rental scanners for a set number of days. A message will display indicating how long the scanners can be used.
8) Repeat these same steps with your Test Copy, if you've created one to practice with before the real PI.

Doing the PI

You should use the information found in the "**PI Physical Inventory Overview**" document for specific information on how to do a PI.   Scanner rental does not include training time. If you would like to purchase training contact Janie@anthologysoftware.com a few days in advance of the PI.

Anthology Emergency Pager support does not support or recommend doing a PI on the weekend

Be sure to plan ahead.

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. Create new PI record on the morning of the PI.   Inventory Control | Physical Inventory | F4 New.
2. Choose whether you will be doing a Full or a Partial PI.

3. 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. 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".
7. Wait until scanner is finished beeping and flashing before removing now empty scanner from the cable.
8. 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
9. You can print this batch or review to locate any titles that were mis-scanned or are problematic. Once the review is complete, you should immediately click "Consolidate Quantities" and F10 Save before editing the batch.
10. Leave the batch in natural order to view any miss-scanned items or items not found in the inventory. You should attempt to Fetch these items if they are valid ISBNs (alt+F5), or delete them from the batch if they are bad scans before posting the batch.
11. Post the completed batch record to update the "CountQty" on the Master PI record. The master PI record is green in the list tab and has a status of Open. When a batch is posted it's countqty value gets added to the countqty on the master PI. When a Scan batch has been posted it 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. 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 sorting by the Discrepancy 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.
17. Then you can finalize your changes by using the "Alt+F12 Adjust Inventory" option. BE PATIENT! This change is updating every single inventory item in your system and can take several minutes. 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 5.16.058 or higher for the PI

• 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 DOUBLE UP on a 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.

- Each Scan batch must be double checked, and titles added or corrected as necessary. Once each Scan batch has been checked, it should be posted. This adds the physical counts to the master record in the "CountQty" column and changes each the batch status to Update. (Updates relate to the PI master record much as Shipments do in Receiving to their master PO.) Once you have posted all the scanned batches you can then manually make any last minute adjustments in the Master PI record (Open Status record) and move the whole PI to completion by adjusting the inventory on hands.

- You can note the name of the store section or shelving unit for the batch being downloaded. When in the Master PI record, just before doing the Get Data command, fill in the detail in the "Update Note" field. When you download the scanner that note will be copied to the batch record, where it is not editable. You may need to delete the contents of the Update Note field on the Master PI record before downloading a new 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".

- DO NOT leave any scanner connected to the cable after the download in completed because it drains the batteries. If you have problem downloading a batch from any scanner, disconnect the scanner, close out of anthology, wait one minute and try again.

- 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 books have two different barcodes printed on them. The correct one to scan for books is called an EAN13 barcode which starts with 978. Please read the help system section entitled Special Topics | Understanding Barcodes. To avoid heartburn, all staff assisting with the PI must know to scan the appropriate barcode.

- Once you have gotten the scanner and base working in the training, DO NOT install any new software, printers, hardware, etc. until the entire PI has completed. In some cases installing a new printer disables the serial port the scanner bases use.

- 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 to higher pitched beeps along with red flashes, but no laser light will appear. You can hit the (-) to scan the last item to remove it from the scanner. Continue to scan past the warming beep can cause serious problems such as the inability to download that batch and subsequent batches. This is one of the most common mistake stores make and will lead to lost time!

- If you attempt to "Get Data From Scanner" and get a message of "Cannot connect CS1504 to serial port" or "No Data to Download" the cable may have gotten dislodged from the scanner or the computer. Double check the cable connections before attempting again. It is important to connect to the exact same USB port as before or the driver will have to be reinstalled.

- If you attempt to "Get Data From Scanner" and get a message of "No Serial Ports found" or "No Data to download" after checking all connections. Don't force another upload and don't panic.

- o   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.
- o   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).
- o   3. Clear that scanner (hold – button for 20 seconds).
- o   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: What kind of batteries does the CS1504 use?

- • Symbol recommends using 4 Energizer EPX76 batteries in each scanner for optimal performance. These are also sold under the models 357/303, A76, AG13, LR1154, LR44, or SR44SW/W. You will need a small crosshead/Phillips screwdriver to change the batteries. We recommend using an eyeglass repair kit screwdriver. There is a single screw near the bottom end of the scanner. Be VERY careful putting in the batteries. The two batteries on the left should be printed side up, and the two batteries on the right should be printed side down. Putting in the batteries incorrectly could seriously damage the scanner.

Q: How long do the batteries last?

- • Symbol estimates up to 5,000 scans on a fresh set of batteries.

Q: How do I know the collector is full or the batteries are low?

- • The scanner will emit a beep when it is getting full and another when it is 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?

- • Again, 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. You should finalize the PI, then do a SalesHistory report to double-check any items sold. Use the Master Files | Inventory F6 OH

Edit option to correct those items. Some stores have attempted to modify the CountQty column for items sold while working on the PI. However this has proven to be a less accurate method as stores are unable to tell if an item was moved/sold before, during, or after the count.

Q: I plugged in the scanner and choose the "Get Data From Scanner" option from the action menu and am getting this error message.

- This error means the computer has not recognized the scanner and/or cable. You may need to shut down the computer again, leaving the cable connected. Bring the computer back up and try again.

| Physical Inventory	(Filter applied)	✕
ⓘ 1 Error code In SYMBOL_CS1504.VERIFYCONNECTION		
OK		

Q: I plugged in the scanner, and chose the "Get Data From Scanner" option from the Action menu and am getting this error message. How can I get my scanner to download again?

- Unplug the scanner, click ok, close out of the PI and Anthology. Open Anthology and the PI back up. It's critical that you connect the scanner first and then do the Get command, not the other way around.

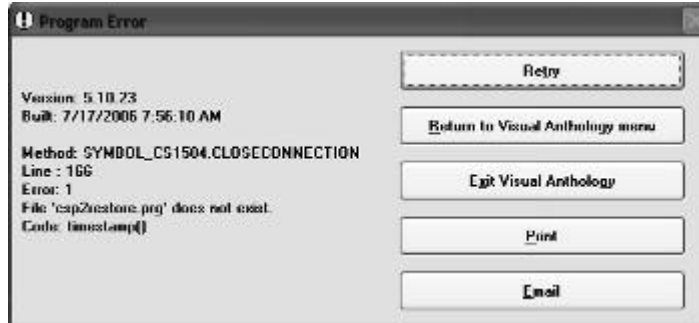| Physical Inventory	☒
ⓘ Communications Error In SYMBOL_CS1504.VERIFYCONNECTION	
OK	
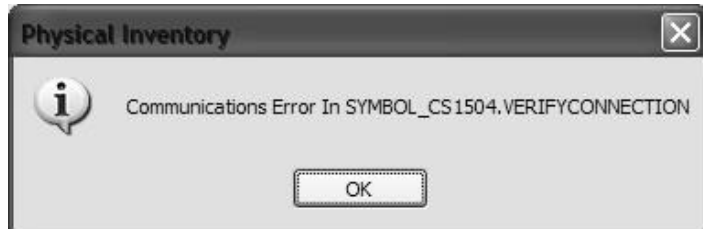
Q: I get the following error when trying to download from the scanner:

- Click OK, disconnect the scanner. Close out of PI and Anthology for 1 minute. If you try to get the data again and get the same message, try connecting the scanner and doing another Get Data command. Occasionally the scanner needs to be left sitting on the cable long enough for the green light to stop flashing and then have the Get data command to run again.

Load Data	☒
ⓘ Not able to connect to CS1504	
OK	
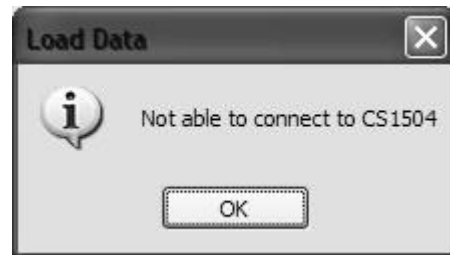
Q: I get the following error when trying to download the scanner:

- You may notice the scanner starts blinking immediately when connected to the cable. If this happens it's likely that doing the "Get Data" command will result in the above error. The quickest fix for this issue is to choose Exit Anthology, disconnect the scanner for 30 seconds, then get back into the PI and reconnect the scanner to try another Get command.

Program Error

Version: 5.10.23
Built: 7/17/2006 7:56:10 AM

Method: SYMBOL_CS1504.CLOSECONNECTION
Line : 166
Error: 1
File 'csp2restore.prg' does not exist.
Code: timestamp()

Retry
Return to Visual Anthology menu
Exit Visual Anthology
Print
Email

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

- First clear the scanner by holding the (-) for 20 seconds. You should hear it beep twice when cleared. 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. Further, if even a book item fails to be scanned, you may wish to change the batteries in the scanner. Further you may need to switch the audio mode on the scanner. Hold down the (+) button for 15 seconds, during this time the scanner may blink green, amber, then a steady amber light. This will toggle the sound off. Now toggle the sound back on by holding down the (+) again for 15 seconds until the scanner beeps. Attempt to scan the book item again.

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: 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.

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 "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?

- Close the PI, and Anthology. You may also need to shut down the computer for 1 minute and change the batteries as well if left for an extended period of time.

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. Go to the Master PI record and hold the scanner and cable in one hand, but not connected. Go to the Action menu and choose "Get Data From Scanner". Then immediately connect the scanner to the cable. Remember, that these scanners want to send the data as soon as they are connected. Think of the connection process as opening the door (Get Data) and walking through the door (connecting the cable). If you still experience problems you may need to replace the batteries on the scanner, or shut down the PI machine, disconnect the cables, and try to connect the PI scanner cable to 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@anthologysoftware.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.