Anthology, Inc.

Physical Inventory- using RGIS

2-4 weeks Plan for prior to PI Physical Inventory   While you can rent scanners for a Physical Inventory, you can also have an outside group such as RGIS come to your store and scan/count the items for you. Assistance with the RGIS process or importing of the counted qty's is not covered by the normal Anthology Support & Maintenance contract and must be done on a Billable basis by the Anthology Consulting Services department.

Normally this process has 3 stages:

1)   In the first stage you are making arrangements with RGIS. They will also want a "Validation" file. If they do not ask you for one, you should ask them to use one. A Validation file is a small sample file for RGIS to use in formatting their final summary of the counted qty's.   This will make it faster and simpler for getting the counted values into your system.   Please contact Anthology Consulting Services now to get the Validation file.

2)   In the 2nd stage RGIS will be at your store counting your inventory. Some stores have reported that while the RGIS rep was aware of the special barcode needs of a bookstore (EAN vs UPC) the staff doing the actual counting was not always aware of it. You will want to verify that the team counting your store is aware of mass market paper backs having the correct barcode on the inside front cover instead of the back cover.

3)   In the 3rd stage RGIS has completed the inventory and will be providing you with a file containing the summarized counts. This file must be imported by an Anthology Consulting Services technician into the Physical Inventory Module of your Visual Anthology program.   This must be scheduled in advance so please schedule this task at the same time you are arranging for the Validation file in stage #1.

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.**

Completely Read PI documentation watch Video Tutorials		As you'll be using Visual Anthology to wrap up the RGIS Physical Inventory you will need to be familiar with using that module. Go to the Customer Zone on the Anthology Website and review the documents on PI and the Video Tutorials as well.

1-2 weeks before PI	**Prepare PI 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, 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.
	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.

Complete Optional 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 entering in counts, and posting them. If your staff will be using the barcodes to identify a title, consider reviewing with them the different barcodes. Check our help system for pictures of different barcodes under Help | Contents | Special Topics | Understanding Barcodes.	

1-2 days for PI	**Prepare before PI by getting Validation file**	As you are in final discussions with RGIS on the Date/time the team will arrive to count your store, you should also be in touch with Anthology Consulting Services to provide a Validation file for RGIS. Having this file will allow RGIS to properly count your inventory and provide you with a proper summary file.

Day of PI	**RGIS in store doing counts**	At this time the RGIS team will be in your store doing the counts

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Day after RGIS sends PI		
	completed Count file	At this time RGIS should have provided you with the final count file. Depending on your prior arrangments they may have given that file directly to you or they may have sent it directly to us.
	Anthology Consulting Services logs onto system	The Anthology Consulting Services group will log onto your system and import the RGIS file into your Visual Anthology program, directly into the Physical Inventory module. From here you will be double checking the qty's, correcting any mis-scanned item counts, running reports, etc.
	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. Remember that the inventory OnHand will be completely **Replaced** by the PI's TotCount values.