



Anthology, Inc.

CS2000 Scanners and Visual Anthology Physical Inventory

Overview:

The Physical Inventory module in Anthology is used to help you count your inventory and get it into the computer for faster processing and adjustment.

Think of this module like your Purchase Orders and Receiving Memos. The master record is like a Purchase Order / Receiving Memo, and the Scan batch is like the Shipment records in Receiving.

Essentially you will have a master record with a status of OPEN. Depending on whether you are doing a FULL inventory or a Partial inventory, you will have one master record or several. Each scanned batch that is downloaded will have its own batch record with a status of SCAN until posted. Batches that have already been posted have a status of UPDATE.

IMPORTANT: You must be running the latest version 4.4.203 or higher.

IMPORTANT: Every inventory item must have a Department and a Section for the PI module. You should start by going to Master Files | Inventory | List Tab and sort by Department, the blanks will float to the top of the list. If you have several titles that are lacking department or section consider creating a temporary “Needs” department or section. Use the Multi-select technique to highlight several records and choose the Reassign option from the Action menu to mass reassign the items.

IMPORTANT: If you are doing a Partial inventory, it is best to restrict each batch to 1 section. If you must do multiple sections per batch be sure NOT to double up on a section. This means that if you set Batch #1 to cover History and Cuisine you do not want to re-use Cuisine in another batch. Doing so will cause you to overwrite one batch section counts with another, resulting in incorrect OH's.

The Physical Inventory module 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.

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 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 and move the whole PI to completion by adjusting the inventory on hands. This changes the master record status to Complete.

We will now go over the specific steps to setting up and using Physical Inventory and the CS-2000 scanner.

Hooking up the scanner:

- Insert fresh triple A (AAA) batteries into the handheld scanner
- While the computer is powered off, hook up the CS2000 Handheld Docking Base to an available serial port on the computer.
- Power on the computer and insert the CS2000 into its docking base. Make sure you have the scanner firmly seated. The scanner works best if the button on the scanner goes toward the front of the docking station, away from the cable.

Scanning barcodes with the scanner:

- Just press the large button marked with a (+) on the scanner and scan the barcode. A green light should appear on the front of the scanner, the red laser should appear from the tip of the scanner, and an audible beep be heard with a successful scan.
- **NOTE:** Be sure to scan the correct barcode. Many books will have two different barcodes to scan. The correct one to scan is called an EAN barcode and will start with 978. Please read the help system section entitled Special Topics | Understanding Barcodes. All staff assisting with the PI should be intimately familiar with using the appropriate barcode. It is a good idea to have new staffers practice identifying the correct barcode in advance of the PI.
- 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.

Scanner Details & Troubleshooting- Please read completely :

- 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 as soon titles are downloaded to the PI screen. Make sure that the scanner has signaled the all clear. When you give the signal to get the data

from the scanner, it will flash green and give 2 long beeps and begin downloading the data. As the scanner completes the download it will continue to flash green and give 3 long beeps. The scanner will then be given the signal to clear the memory, it will continue to flash green until it completes where it then flashes red and gives 3 short beeps. It can take a couple of minutes for the scanner to signal the all clear. If the scanner is pulled too soon, the scanner is not emptied and the subsequent scan will overload the 300 item limit.

- DO NOT scan more than 300 items. If you have hit the limit the scanner will emit to higher pitched beeps along with red flashes. You can hit the (-) to scan the last item to remove it from the scanner. The scanner has a limit of 300 items in the memory. Scanning more than 300 will cause serious problems such as the inability to download that batch or subsequent batches. You should take the time during “Planning the Physical Inventory” to divide shelving units into manageable sections of 150-300 items. This is one of the most common mistake stores make and will lead to lost time!
- The best case for doing PI is with the store closed. While you can use the rental scanners and bases during sales, it is not recommended for many reasons.
- You may have been provided with a 2nd scanner base. Use only ONE of the bases at any given time; the 2nd one is provided as a backup in case the first one fails.
- The batteries should be changed once a day for optimum batch downloading.
- You should stop periodically, save the PI and close it. Do a Quickbackup, Database Reindex, and Rebuild keywords at least once a day for best results. You should do these actions just before doing the final Alt+F12 Adjust Inventory option to complete the PI.
- Do not let scanners sit in docking station for extended periods of time after the all clear signal has been given as it can drain the batteries. Remove the scanners from the docking station once the batch has been downloaded and scanner has given the all clear signal.
- If the scanner has been in the docking station for several hours, it is possible the batteries have been drained. Change the batteries and try pressing the scan button again.
- You may wish to perform the manual clear on the scanner after pulling from base. Hold down the (-) button for 20 seconds until the light flashes yellow and beeps several times in a row. If the scanner flashes red or none of the above is seen/heard, then make sure the battery cover is firmly in place and the batteries are correctly inserted.
- If the scanner does not respond after changing the batteries then try the “Clear Scanner” option by holding the small button marked with a (-) for 20 seconds. The scanner will flash yellow and beep several times in a row. This acts as a reset for the scanner and clears all scanned items from memory.
- If you attempt to “Get Data From Scanner” and get a message of “Cannot connect CS2000 to serial port” the scanner base may have gotten dislodged from the tower. You should shut down the machine and double check all connections.
- If you attempt to “Get Data From Scanner” and get a message of “No Data to download” the scanner may not be resting firmly in the base. Double check all connections.
- If you attempt to “Get Data From Scanner” and get a message of “No Data to download” after checking all connections, the scanner may have been overloaded. Stop all scanning in the store. Verify with the staffer that last had the scanner what section they scanned and the size of it (no more than 300). Attempting to download other scanners immediately after this can lead to a complete lock up of the PI module. You should shut down the entire system and reindex. Perform a “Clear Scanner” and try a test scan of 3-

4 items to download to ensure the scanner is in working order. If the problem persists you should shut down the entire system, do a quickbackup, database reindex, and rebuild keywords. Every scanner should have the batteries replaced, and each must have a “Clear Scanner” done before attempting to go further. Try scanning 3-4 items on each scanner and downloading them. You can void these test batches before continuing on with the real system.

- If after attempting the above troubleshooting steps the scanners still cannot be downloaded, you may attempt to move the base to another computer. You must have the machine off to remove or connect a scanner base.

Testing CD Fetch:

- To ensure that CD Fetch has been properly setup and is functioning correctly, go the Anthology, Master Files, Inventory, and click F4 to add a new record.
- Type in an ISBN that is not currently in the Anthology system. If Fetch is working appropriately and the title is in the external database, the title information should appear. Sometimes a title is not found via Fetch, so the program will display the “Inventory Assistant” window so the user can add the item manually.
- Items not already in the inventory and downloaded in a batch will display the ISBN, but not a title. After downloading a batch you should sort by title to locate any blank title items at the top of the list. You should deal with these items before posting the batch.
- If you wish to change the Default information that is imported from the CD; such as default department, media, publisher, etc., please go to Tools | Options | External Data to change the settings.

Beginning Physical Inventory:

1. Open Anthology on the computer that has the scanner’s cradle physically attached
2. Click on Inventory Control | Physical Inventory
3. The first screen (List Tab) will show a list of all existing physical inventory batches.
4. Create a new Physical Inventory by clicking on “F4 New PI” button.
5. A wizard will appear, the first step is to supply a name for the batch. If you are doing a Full you can give it the name of PI2005 or anything else descriptive. If you are doing a partial, name it something that reflects the sections you are working on.
6. The 2nd step is to select a full or partial inventory. Partial means you only want to be updating information for the sections you choose. If a partial inventory is chosen and then an item is scanned that belongs to a section not picked for the PI you will be required to remove the item from that particular PI batch. A full inventory will allow you to scan any item in the store, as long as it exists in the inventory file.
7. The next step will ask you to choose the sections you will be scanning if you chose Partial Inventory.

8. After you complete the wizard the program will begin building a list of the titles selected based on the Full or Partial setting. This process can take several minutes.
9. Once the build process is complete, immediately F10 Save the PI.
10. Begin scanning the titles in the section. Don't try to scan all the books in the store in one batch—it's best to create relatively smaller batches of at most a couple hundred books at a time. If something goes wrong you won't lose too much work.

NOTE: The scanner will only hold 300 scans. Meaning if you scan a title that you have 6 copies of, you have used 6 of the available 300 spaces. It is best to limit yourself to 300 per batch. This is usually one standing shelf unit. If you go over this limit, you will have problems retrieving the data. This often results in needing to completely wiping out the scanner and re-scanning the batch and can prevent the other scanners from being downloaded as well.

11. Once the batch has been scanned insert the scanner into the docking station. Make sure the scanner is firmly seated. The scanner must be set in the base with the buttons facing forward. The base should have the lower rim in front, with the serial cable coming out of the backside away from you.
12. Click the ACTION menu and then "Get Data from Scanner" to retrieve the data from the scanner. It may take as long as 30 seconds for communication to be established with the scanner and another 30 seconds to complete the read and erase. When the data has been read, the scanner will give the all clear by giving 2 beeps, followed after a short pause by 3 faster beeps. While it is working on getting data the green light will flash. When done it will flash red. Don't remove the scanner from the cradle until the red light flashes.
13. You may wish to perform a Clear Scanner on the scanner once you've removed them from the base, put them into an "Empty" pile for staff to pick up.
14. Once the data has been retrieved from the scanner, you will be brought back to the list tab. You will now see an additional grey record for the scanned batch. It will be named the same as the master record. This record will have a status of "Scan".
15. Click on this record, click on the Details tab, and verify the items. You should immediately press the F6 Consolidate Quantities button.
16. Any items scanned that were not already in the inventory will show just the ISBN, no title. If you click on a blank title item the system will attempt to fetch the data. This only adds the information to the batch, not the main inventory. To add the item to the main inventory, highlight each item and click the "Alt+F5 Add to Inv" button.
17. Once the Scan status record is correct it needs to be posted to the PI master record. Just click on F12 Post Update to do so. If there are any items scanned that belong to a section not included you will be unable to post this scan until the item is removed/deleted from the batch.
18. Once completed the scan batch will have a status of Update which completes the scanned batch.
19. Continue scanning and posting the Scan status batches until all of the desired physical inventory counts have been done.

20. The PI master record (original record) will be green and with a status of Open and will have all the titles in the inventory or sections specified. You will see fields for InvQty and CountQty in the line item entry area.
21. This master record needs to have all of the batches so far summed up before making the final inventory adjustment. To sum the batches on the master record just click the “F12 Post Update” option. You will now see numbers in the “Total Count” field. This is a sum of all the batches so far for the title.
22. At this point you can go back in and manually edit any line items, in case some were missed in the scanning. Just save the changes when complete and post the update.
23. **IMPORTANT:** If you have missed a physical section, yet had the section on the PI, your total counts will be 0. 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 on hand will have 2 copies subtracted to change it to the correct 8 copies found. Be sure to run an exception report to spot any missed sections before finalizing the PI.
24. Once satisfied all the numbers are entered correctly, save any changes and close out of the PI module. Run a Quickbackup from the Tools menu before continuing on.
25. When you are ready to finalize the PI and adjust the master inventory file On Hand numbers, use the “Alt + F12 Adjust Inv” option. This will change all the On Hand numbers with the Total Count value. A message will come up verifying if you want to update the inventory On Hand. Let this sit for a while as this is working with every item in the inventory, it can take some time to do. This completes the entire PI.

SPECIAL NOTE

Introduction to Bar Codes

Anthology allows you to use a bar code reader to enter data. Within the publishing industry there are two types of bar codes commonly used EAN-13, and UPC codes. A third type exists called CODE 39. Visual Anthology uses the CODE 39 bar code when labels are generated from within the Visual Anthology system.

EAN-13 Bar Code

EAN-13 codes can be found on most books being published today, either on the back cover or on the inside front cover. You can recognize EAN-13 codes by the 978 which will appear at the beginning of the number printed beneath the bar code. EAN-13 codes encode (that is, contain within them) the ISBN numbers for the books on which they appear. Visual Anthology translates these codes into ISBNs automatically. You can use the bar code reader to enter ISBNs into inventory by scanning the code into the ISBN/SKU field. Because Visual Anthology automatically converts these numbers you may simply scan the EAN-13 code on the book to locate the item in inventory during sales.

Sample Code



UPC Bar Code

Some mass market books are printed not with UPC codes on their back covers. These codes do not encode an ISBN and therefore cannot be converted to ISBNs by Visual Anthology, LoadData, or Physical inventory tools. Generally these books will have the EAN-13 codes inside the front cover. You can still use UPC codes with Anthology if you so choose. But you must scan the code into the ISBN/SKU field in the Inventory file record for that book before Visual Anthology will be able to recognize a scanned UPC code.

This is good candidate for the Alternate SKU field in inventory. This way either code scanned will be located. It is important to note here that publishers will not accept orders by UPC code. They require ISBN.

For those books which do not come with any EAN-13 code, with no bar code at all, or even with no ISBN, you may want to print out bar codes through Visual Anthology. These labels will encode whatever number has been entered into the ISBN number field in the Inventory file

record for the books received (See [CODE 39](#) for limitations). You can paste these labels on your books so that they can be scanned at the register.

Sample Code



Understanding CODE 39

Code 39 is commonly used for bar coding labels in inventory and industrial applications. The symbology of the Code 39 character set consists of bar code symbols representing characters 0-9, A-Z, the space character and the following symbols: -, ., \$, /, +, %. All other symbols will be ignored by the code. Visual Anthology uses this type of code when generating labels.

Sample Code

