Importing Data from a Handheld Scanner

Purpose Use this feature to import data from your portable data scanner into Executive.

To open the **Import Inventory Count** window, select **Import Reconciliation – Auto File** from the **Functions** menu.

1. Click on the yellow file folder to browse to the text file that you retrieved from the scanner. There are two ways to import the file type. Type 1 is for a fixed width scanner and Type 2 is for a comma-separated scanner. Please check your scanner manual to see which type of file the scanner creates.

2. Once you have found the text file, select it and click on the **Open** button.

3. Click on the **Import** button to import all the scanned items into the **Reconcile Inventory** window.

Note: The file will overwrite the information already existing in the Reconcile Inventory window. Make sure to check before proceeding.

If the operation is successful, you will receive the following two confirmation messages: This will remove any items that are currently selected to be Auto Reconciled. Do you want to continue? Click **Yes** to confirm.

Please note that you must import the scanned items into the auto reconcile first before adding any items to the auto reconcile manually.

Then a message will pop up stating the scanned items have been imported successfully. Click **OK**.

Complete steps 6 – 9 starting on page 14D-1.

When you have finished, click on the ⬛ button to save and close the window.
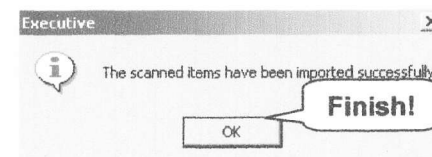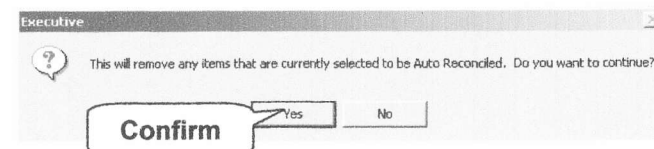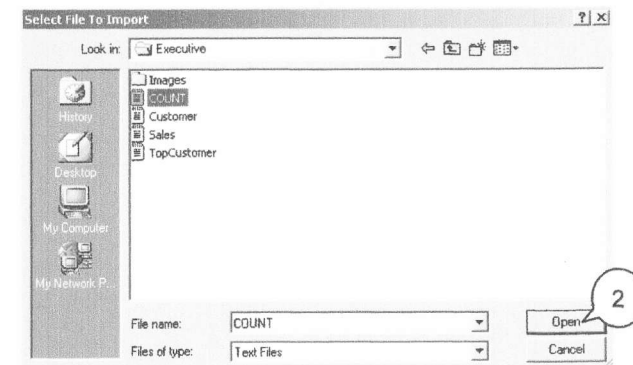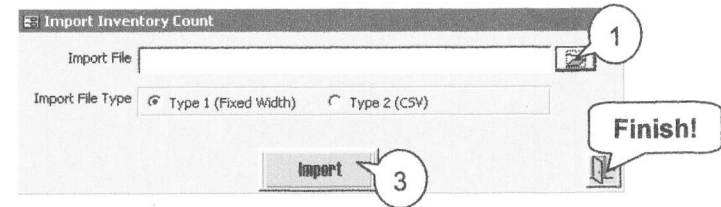
Scanner Package Checklist

Please complete this form before returning scanner package. Use check boxes to check off items to be returned.

Item	Qty	
PT600 Portable Scanner	1	❏
RS232 Cable	1	❏
9-pin M – 25-pin F connector	1	❏
DC Adapter	1	❏
User's Manual	1	❏
Installation CD	1	❏
Operating Instructions booklet	1	❏

HORNET™
DATA
COLLECTOR

Operating
Instructions
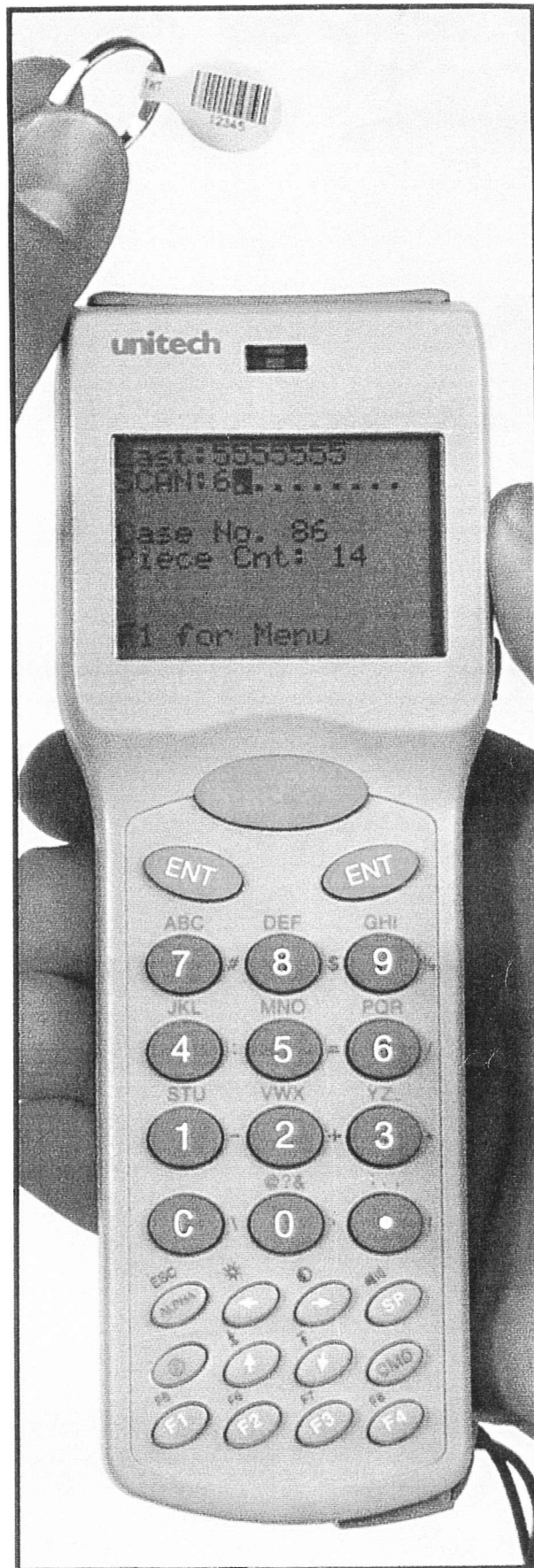
Display shows:
Qst:5555555
SCAN:6...........

Case No. 86
Piece Cnt: 14

F1 for Menu

unitech

Operating Instructions for the Hornet™ Data Collector

Manual

These instructions should be sufficiently detailed that you will be able to use the Hornet's resident Physical Inventory program without needing to refer to the Hornet's User's Guide. If you do refer to the User's Guide, be aware that there are procedures outlined in that Guide which could result in the destruction of the data you have collected and the application programs that reside in the Hornet's memory. In particular,

NEVER, EVER PERFORM A COLD BOOT.

Power

The Hornet is powered by a rechargeable battery. To charge the battery, plug power supply into an outlet, plug the jack on the black power cable into the receptacle on one end of the data cable, and plug the other end of the serial data cable into the Hornet. It takes about 14 hours to fully charge the Hornet's battery. When fully charged, the Hornet can scan at least 5000 items.

The Power button is near the lower left corner of the Hornet keypad, and is marked with a red circle. Press it briefly to turn the unit on. Press and hold for several seconds to turn the unit off (just like a cell phone). The Hornet will turn itself off after several minutes of inactivity to save the batteries. When turned back on, it will resume at the point in the program where it left off.

When first turned on, the following opening screen will display:

```
Kassoy
  Automated
    Solutions
Physical
  Inventory
    Program
Copyright 2001
Press any key..
```

Taking Inventory

1. **Identifying Information:** Depending on the version of the software in the Hornet, pressing any key at the opening screen (previous page) may result in your being asked to enter any or all of the following:

- a USER NO. of one to four characters to identify the person performing the actual counting process;
- a LOCATION (typically a store number) of one to four characters; and
- a single character ACCOUNTING CODE to differentiate between Store and Layaway merchandise, or between Owned and Memo goods, or for any other similar purpose.

2. **Main Menu.** Pressing any key at the opening screen (previous page) takes you to the Main Menu:

```
<< MAIN MENU>>
1. Collect data
2. Erase ALL data
3. End
```

3. **Erasing Data:** It is always a good idea to discard any data that may be left in the Hornet from a previous use. Old data that is not erased will have new data added to it when you take inventory, and thus might cause confusion. If you are not sure that the old data can safely be discarded, upload and save it on a PC [See below] before erasing it.

To **Erase ALL data,** select item 2 from the **MAIN MENU** to get the following screen:

```
Enter Password
To DELETE ALL
DATA: ____
Erase all?
```

The password for deleting all data is "**9876**", followed by an Enter key. Then press "1" to signify Yes at the **Erase all?** question. If unsure, press "2" for "No".

4. **Starting Inventory:** To begin taking inventory, press 1 from the **MAIN MENU** to **Collect data.**

5. **Cases:** Inventory data is collected by showcase, or "case". This is done to break down a large physical inventory task into a number of smaller tasks in order to make it easier to find and fix procedural errors, and to provide a useful record of what was found in each location. If this feature is not useful to you, it is possible to scan an entire store as if it were a single case. However we do not recommend this for the reasons mentioned above.

A case can be designated by any combination of up to four or five numbers and letters, depending on software version. To type letters, you need to press the Alpha Shift key (marked **ALPHA**) once to shift to letter mode. Note that the cursor changes from a block "□" to an underscore "_" when you are in alpha mode. Pressing any of the keypad keys enters the *center* letter of the three that are printed above the key. To enter the *left* (or *right*) of the three letters, press the "<" (or ">") key before pressing the key below the letter you want. If you make a mistake, you can backspace by pressing the Clear "**C**" key. After entering the letters you want, switch back to number mode by again pressing the Alpha Shift key "**ALPHA**". Finally, press either of the two **Enter** keys (the smaller orange buttons under the screen).

For example, you can enter the case number "**M15**" with the following sequence: **ALPHA** (to go to alpha mode), "<", "**5**" (to get the **M**, which is the leftmost of the three letters above the 5 key), **ALPHA** (to get out of alpha mode and back to number mode), and then the "**1**" and "**5**" keys, and finally either of the **Enter** keys.

6. **Starting a Case:** Enter the case number of the case you are starting at the **Start Case_____** prompt, then press **Enter**:

```
            Last Case:
            Start Case:  ____


            F1: MAIN MENU
```

When you are starting a case other than the first one of the inventory, the number of the case that was previously inventoried will display after the **Last Case** prompt to help you keep your place in the inventory process.

Now you can begin scanning by pointing the scanner at desired bar code and pressing the SCAN button, the largest orange button at the top of the data collector.

7. Scanning an item: Scan in the barcode of each individual item one after the other. If a bar code is not present or does not scan for any reason, you can enter the item number manually at the `ITEM____` prompt using the keypad, and pressing `ENTER` when done.

In order to help you keep your place, the display will show the number of the case that is being inventoried, the number of the scans that have been made, and the item number of the last item scanned; for example:

```
Last:14385722

ITEM:_____

Case No. M15
No. Scans: 23
 F2: Scan Menu
```

Note: If you reach the point where the program calculates that you are running low on memory, the following message will appear

free mem= nnn KB
Download data
 soon
 press any key

The "nnn" in front of "KB" is the amount of free memory left. This is a warning that you should soon download, then erase the data you have collected so far.

8. Removing an item from Inventory: If you mistakenly enter an item, you can immediately remove it from inventory. To do this, press the F2 key to get to the `SCAN MENU`:

```
<< SCAN MENU>>
1. QTY On/Off
2. Remove Last
3. End Case
4. Abandon Case
5. Continue Scan
Choice:
```

Select 2 to remove the *last* item entered. This item will be displayed and you will be asked if this is the correct item to be removed. Press 1 for the item to be removed; 2 if it should *not* be removed; then press any key to return to the **SCAN MENU**. *Note that only the most recently entered item can be removed.* Then press 5 from the **SCAN MENU** to continue scanning. The letters **DEL** will appear under the last item scanned to show that it was removed from inventory.

9. **Quantity Mode:** Sometimes you will have a number of identical items to be entered into inventory. Instead of scanning each of them individually, you can save time by scanning just one and entering the total quantity manually. To do this you must first enter Quantity Mode ON *before* scanning the item whose quantity you want to enter manually. You enter the Quantity Mode from item 1 of the SCAN MENU:

```
<< SCAN MENU>>
1. QTY On/Off
2. Remove Last
3. End Case
4. Abandon Case
5. Continue Scan
Choice:
```

Pressing 1 alternately turns the Quantity Mode ON or OFF as shown on the screen. After selecting the mode you want, press 5 to continue the scan. When the Quantity Mode is ON, you are prompted to key in up to two digits of quantity information after the item number is scanned. A quantity of zero may *not* be entered, but a quantity of one is acceptable.

When Quantity Mode is ON, the quantity for the last item scanned is also displayed. [Note that when you remove the last item scanned from inventory (Section 8), you remove whatever quantity of that item was manually entered if you were in quantity mode.] Use the option 1 on the **SCAN MENU** to turn Quantity Mode OFF when it is no longer necessary.

10. **Correcting Errors Immediately:** If you make an error and catch it immediately, there are two ways that you can correct that error very simply.

If you are in Quantity Mode and mistakenly enter (key or scan) a wrong item number and catch that error *before* you have entered a quantity for that item, simply press **F3** to re-enter that item correctly, followed by the **ENTER** key. The scanner will "beep" as a warning in case you have pressed the **F3** by mistake. The last line of the display will tell you when it is possible to re-enter an item number using the **F3** key.

If you are *not* in Quantity Mode, or do not catch your error until after you have entered the item *and* its quantity, you can immediately remove the bad data from inventory. To do this, press the `F2` key to get to the `SCAN MENU`:

```
<< SCAN MENU>>
1. QTY On/Off
2. Delete Last
3. End Case
4. Abandon Case
5. Browse Case
6. Continue Scan
Choice:
```

Select **2** to remove the *last* item entered. This item will be displayed and you will be asked if this is the correct item to be removed. Press **1** for the item to be removed; **2** if it should *not* be removed; then press any key to return to the `SCAN MENU`. Note that *only the most recently entered item* can be removed in this way. Then press **6** from the `SCAN MENU` to continue scanning. The letters `DEL` will appear under the last item scanned to show that it was removed from inventory. (Items other than the most recently entered can be removed from inventory via the Browse/Edit functions described below.)

11. **Browsing and Editing in the Open Case.** To review and edit data previously collected <u>in the current case</u>, press **F2** at the `ITEM_____` entry field to get to the `SCAN MENU` (shown above), then select item `5.Browse Case`. The following screen appears:

```
BROWSE CASE 14
   Prev: 125894
   THIS: 2269751
   QTY: 123

Scan 10 of 10
 < Back   AT END
1=Edit    2=Done
```

The current record is shown at the `This:` line, the preceeding one at the `Prev:` line. Pressing the left arrow key (represented as "`<`") moves one record back (earlier) in the case. (Note that you cannot move forward, since you are already at the `END` of the case.) The `Prev:` record becomes the new `This:` record; the previous `This:`

record is now shown on the `Next:` line, and a new `Prev:` record is displayed. A `Qty` is shown only for the current (`This:`) record.

Continuing to press the left arrow key moves you closer to the start of the case; when you reach it the display will say `AT START` and not allow you to move back any further. In addition, once you are no longer at the `END` of the case, you can move forward with the right arrow (">") key.

During the browse process, entries which have been changed by the user will be flagged internally in the data file. They will also be indicated as changed on the screen for the user. Deleted items will be indicated by an `X` in the left margin next to the item number. For the `Prev` and `Next` items, a `*` next to the item number indicates that either that item number, that quantity, or both were previously changed in a browse session. For the current item, a `+` next to the item number and quantity indicates a change in that data element.

At any time you can press `2` to go back to the `SCAN MENU`, or `1` to edit the current record:

When you press **1** to edit, at this point <u>some users</u> will be asked for a password with the following screen appearing:

> Edit Password
> Enter:

You will need to get this password from a supervisor in order to edit data.

When **1** is pressed, the edit screen appears:

```
C.14;  9/10
OLD: 11111111
1=NEW:
Qty:
  OLD: 23
2=NEW:
3=Delete
4=Abort  5=Save
```

The screen above shows the data for scan 9 of a total of 10 in `CASE 14`. The original item number and quantity are shown on the lines marked `OLD`. Pressing `1` allows the user to enter a new item number, which will replace the one originally

scanned. Pressing 2 allows the user to enter a NEW Qty, which will replace the one originally entered, or the default 1.00 if no quantity was previously entered. Pressing 3 deletes the current record. This is identical to what the Delete Last option of the SCAN MENU does for the last record in the case.

It is possible to edit (change) both the item number and quantity of the same scan record in one editing session. However, it is not possible to both change the data and delete the record at the same time; if this is attempted the record will be deleted with the data unchanged. A + next to the OLD Item or OLD Qty indicates that this value had been changed in a previous edit.

Note that when viewing a previously deleted record on this screen, the screen says DELETED!, and option 3 is UNdelete. Choosing this restores the record to its valid status before deletion.

After making changes to the data and status (valid or deleted), press 5=Save to save those changes to the data file. Pressing 4=Abort results in a return to the Browse screen with no changes made to the data.

Note that items which have been deleted are marked in the data file to indicate that the user's application should ignore them, but are not physically removed from the data file. This is done both to allow erroneously deleted items to be restored, and to provide an audit trail to help resolve any ambiguities in the physical inventory. See the section "Uploaded Data Format", below.

12. Ending a case: When you have finished scanning the items in the showcase, press the F2 key, which will bring you back to the SCAN MENU:

```
<< SCAN MENU>>
1. QTY On/Off
2. Remove Last
3. End Case
4. Abandon Case
5. Continue Scan
Choice:
```

Press the number 3 to end the case. The next screen will show the case number and the number of pieces that have been scanned, and the total number of pieces that have been inventoried. (These numbers will be different if you use the Quantity Mode to inventory many identical pieces after you scan just one of those pieces.)

```
Case No. : #
No. Items:
# Pcs:
End this Case?
 1=Yes  2=No
    Choice:
```

Press 1 to end the case while saving the data just collected; this gives you the opportunity to start another case. If you have changed your mind and do not want to end the case after all, press 2 to go back to the SCAN MENU.

13. Abandoning a Case.
If the data collected for a particular case turns out to be not useful because there are mistakes or for any other reason, that case may be "abandoned" instead of being normally "ended". Doing so deletes the data collected for that particular case. All items that have been scanned prior to abandoning case, will have to be rescanned in order to be counted.

To abandon a case, press F2 to get to the SCAN MENU, then choose option 4, Abandon Case. The screen will list the number of scans and the number of pieces inventoried. Select 1 to confirm your choice or 2 to return to the SCAN MENU without abandoning case.

```
Case No:
No. Scans:
No. Pieces:
Abandon Case?
ALL CASE DATA
WILL BE LOST!
 1=Yes  2=No
```

14. Ending the inventory.
After you have ended the last case, you will be at the START CASE screen, Section 5. Press F1 to go to the MAIN MENU (Section 2). *At this point some users will see the message* "File Processing, Please wait". *A data file is being created and depending on the number of items scanned, some delay may take place before you are sent back to the Main Menu.* At the Main Menu select item 3.END to go to the opening screen.

15. Uploading Data

Program Installation: In order to upload collected data to the users Personal Computer you must install the programs on the Job Gen Lite CD that comes along with the Hornet. This needs to be done only once. To do this:

1. Place CD disk in CD drive
2. Click on **Start** button, and select on Run
3. Browse to your CD-ROM drive, then Select the **Disk 1** folder
4. Double-click on that folder, and locate the **Setup** file in it
5. Click on the **Open** button
6. Click **OK** to run the program D:\Disk 1\Setup.exe, where D is your CD-ROM drive, and wait for the program to install.

Data Transfer: In order to transfer data, you must first connect the Hornet to your PC. Plug the smaller end of the RS232 serial cable into the Hornet and the other end of the serial cable to a serial port (typically COM1). You may need an adaptor if your COM port has a 25 pin rather than a 9 pin connector.

1. Next click on the **Start** button, then place the cursor over **Programs**
2. Select **Job Gen Lite** and then select **PT Comm Manager** from the sub-menu.
3. When this program opens, go to the **Seek Portable** icon (the icon that looks like a plug) located on the toolbar and double click. The PC will make contact with the portable data collector and display a directory of the files on the panel at the top right. The portable will be treated as a remote network drive ("**A : :**", with *two* colons), not to be confused with your floppy ("**A:**" with a *single* colon). If this does not happen, you may need select the proper COM port using the Settings option.
4. The left panel of the display shows a Windows-style list of all the drives on your system. You can click on a particular drive and it will open up to show the folders and sub-folders on that drive. Locate an appropriate folder for the data to be transferred from the portable.
5. Click on, and drag and drop the COUNT.TXT file to chosen folder on your hard drive (typically C:\).
6. You will be given the opportunity to type in an alternate location or filename. After you have done so, if you so choose, click **OK** and wait for the file to be transferred.
7. *CAUTION: It is possible to mistakenly use the Comm Manager to delete essential files from the portable in the same way that you would delete a PC file.*
<div align="center">

DO NOT USE THE COMM MANAGER TO
DELETE ANY FILE FROM THE PORTABLE.
</div>

If you wish to delete a data file from the Hornet after it has been transferred, use the program on the Hornet to do so, as discussed in Section 2 above, Deleting Data.

16. Using the Inventory Data in Your Application:

The file COUNT.TXT contains the data that is collected in the Hornet. Many jewelry programs can import data directly from COUNT.TXT. These programs take the Item Number and the Quantity directly from each record (line) in COUNT.TXT.
Other jewelry programs cannot use the Quantity information in COUNT.TXT. For these programs, the Hornet generates a special output file, SNGLITEM.TXT.
SNGLITEM.TXT contains one record (line) for each physical item counted, even if you entered a Quantity when that item was scanned. (Kassoy Automated Solutions has programmed your Hornet to produce this file only if your software requires it. If so, it is produced automatically in the Hornet at the end of the inventory when the user selects **F1** to go to the main menu (Section 14).)
Use the Upload Procedure in Section 15 to transfer SNGLITEM.TXT (if it exists) or otherwise COUNT.TXT as directed by your software vendor.

You can use a spreadsheet such as Excel with the data in COUNT.TXT to produce reports showing in which case your inventory is located. *If you do this, work with a copy of COUNT.TXT to avoid changing this file or deleting data accidentally.* If you open this file in Excel, the "File Import Wizard" will automatically separate it into columns for you. (If this does not happen, you can use Excel's Data/Text to Columns menu options to "parse" the inventory data into columns. Other spreadsheets provide similar tools to do this.)

You will see something like the following (without the headings, which have been inserted here for convenience):

Item	Quantity	Case
12457812	1	12
12459865	1	12
12459899	1	12
23548721	1	13
21245865	3	13
32612478	4	13
12124589	1	13
53213125	6	13
24587213	1	13

The first column is the bar code number, the second represents the quantity, and the third the case. Other fields, such as User No, Accounting Code, etc. are not shown here. You can very easily obtain useful inventory location reports. Sort first by case (Column C) and then by item number (Column A) to get a sequential list of what items are in each case. Or, sort first by item number (Column A) and then by case (Column C) to obtain a list showing where each item is located, and how many are there.